MERCURY NETWORK GUIDE
BROKER RESOURCE

Mercury Network is a powerful valuation management technology that connects the appraiser with our brokers and Orion Lending. The Mercury Network broker resource clarifies the process of utilizing this critical technology for new (or first) appraisal orders and revised (or second) appraisal orders. Nanotip and microlearning videos enhance the understanding of how to utilize Mercury Network successfully.

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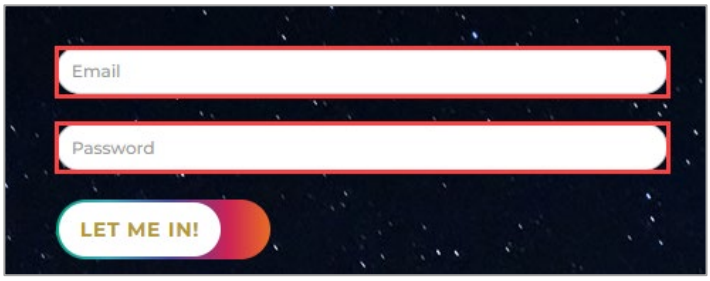
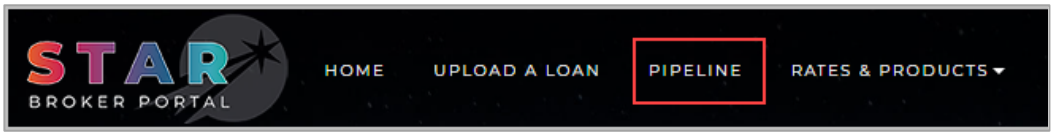
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Access Mercury Network

Orion provides convenient access to Mercury Network through the STAR Portal and the Orion Lending website.

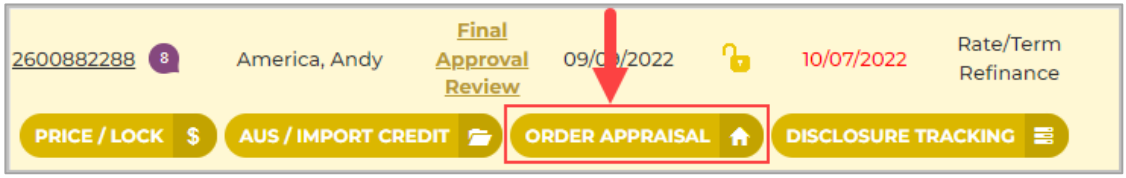
- *Access through the STAR Portal*
- *Using the Orion Lending Website*

Access through the STAR Portal

Step	Action
1.	Log in to the *STAR Portal* with the assigned credentials and click the **Let Me In** button.  **If** / **Then** Your company is an approved Broker, and you need your STAR Portal credentials. → Reach out to your company Admin to obtain your log in credentials. Your company is NOT an approved Broker yet. → Complete the *Broker Application* and submitting to *brokers@orionlending.com*.
2.	Click the **Pipeline** tab. 

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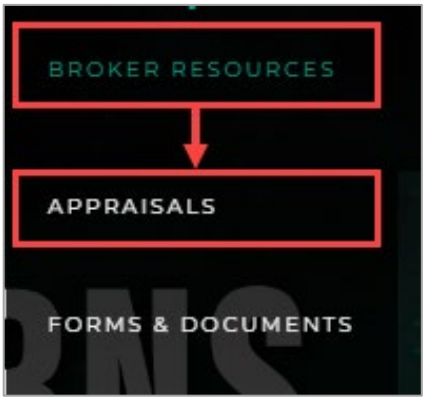
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Step	Action
3.	Click the appropriate **Loan Number** in the pipeline or complete a loan search. 
4.	Click the **Order Appraisal** button. **Note**: If the **Order Appraisal** button is grey, this option is not available.  
Proceed to the Mercury Network Sign In section.	

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Access through the Orion Lending Website

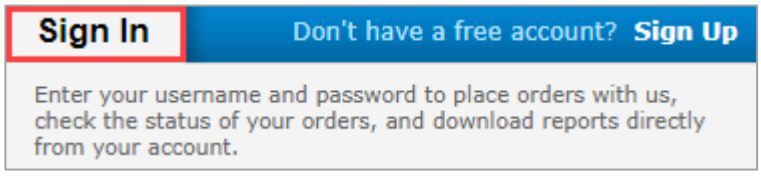
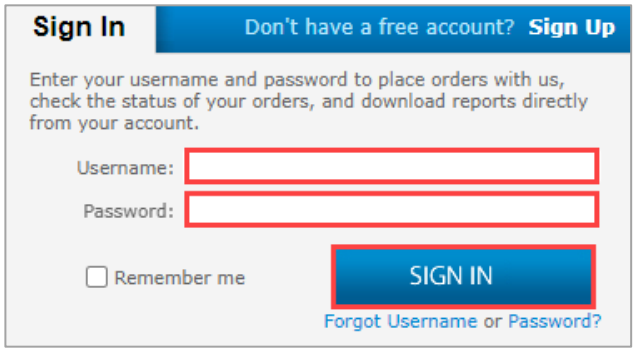
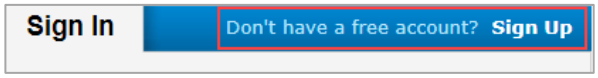
Step	Action
1.	Access the *Orion Lending Website*.
2.	Click the **BROKER RESOURCES** tab, and click the **APPRAISALS** button. 
3.	Locate the *Mercury Network* section and click the **LOGIN NOW** button. 

Proceed to the Mercury Network Sign In section.

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Mercury Network Platform
Signing In

Step	Action
1.	Click the **Sign In** tab. 
2.	Enter the **Username** and **Password**. Click the **Sign In** button. **Note***:* If credentials are needed, click the **Sign Up** link and follow the instructions to complete enrollment.  
3.	Determine next steps. **If** / **Then** Ordering an Appraisal → Continue to the *Ordering an Appraisal* section. Managing Existing Orders → Continue to the *Managing Existing Orders* section.

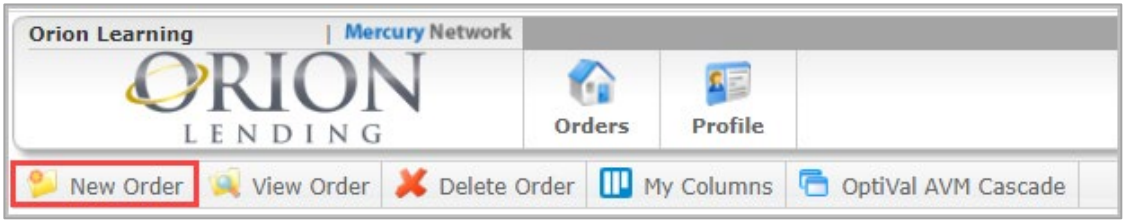
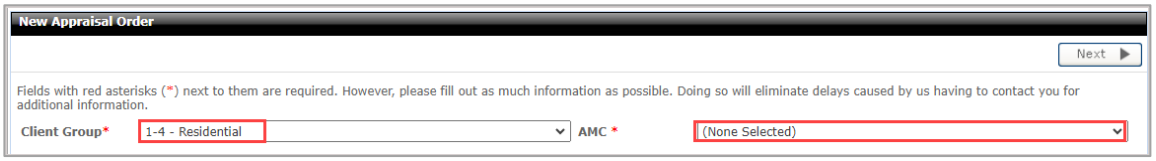
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Ordering an Appraisal

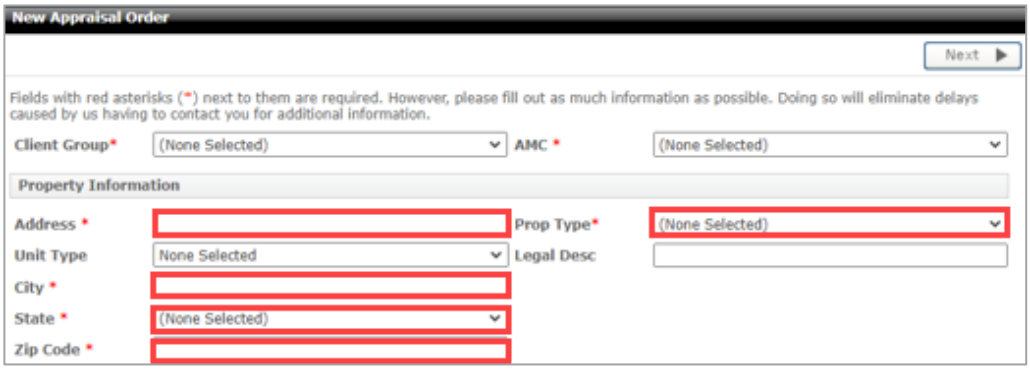
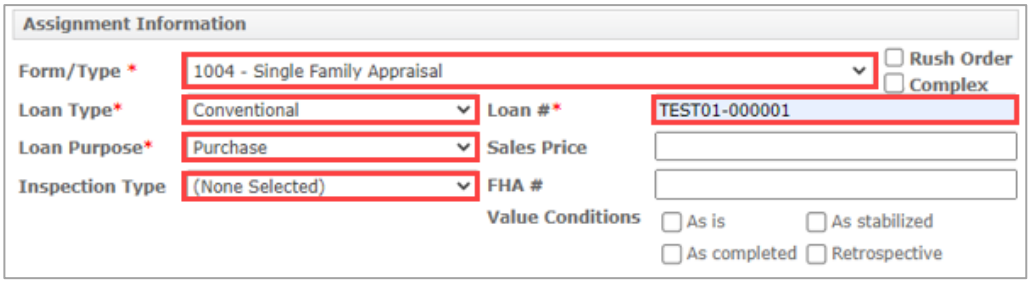
Residential

This report form is for an appraisal order of a one-unit property or a one-unit property with an accessory unit, including a unit in a planned unit development (PUD).

Step	Action
1.	Click the **New Order** button in the header. 
2.	In the *New Appraisal Order* screen, use the drop-downs and select the **Client Group** and **AMC**. 

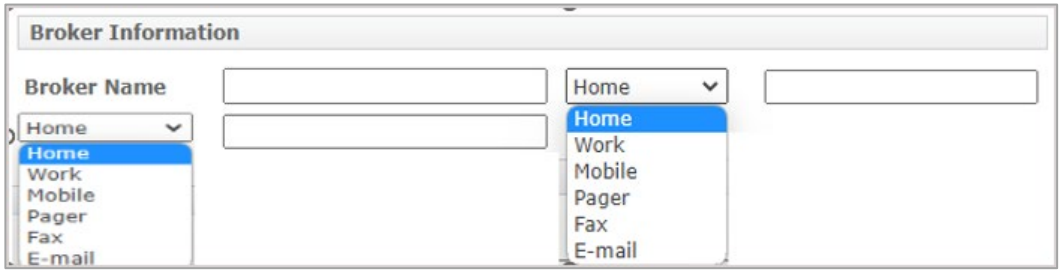
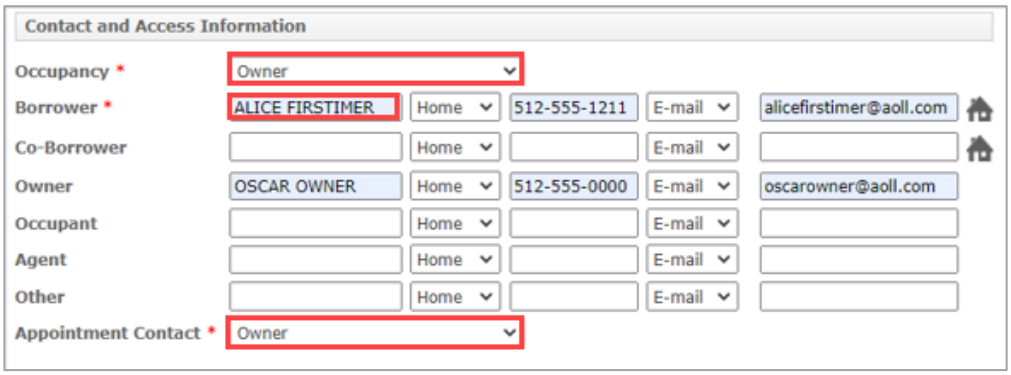
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Step	Action
3.	In the *Property Information* section, complete the following fields and use drop-downs when provided. • **Address** • **City** • **State** • **Zip Code** • **Prop Type** 
4.	In the *Assignment Information* section, complete the following fields and use drop-downs when provided. • **Form/Type** • **Loan Type** • **Loan Purpose** • **Inspection Type** • **Loan #** **Note**: *"An Accurate loan number is critical as it allows our system to auto file your report and task our appraisal team once the report is complete."* 

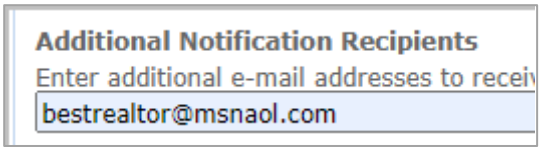
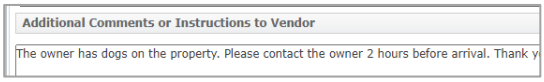
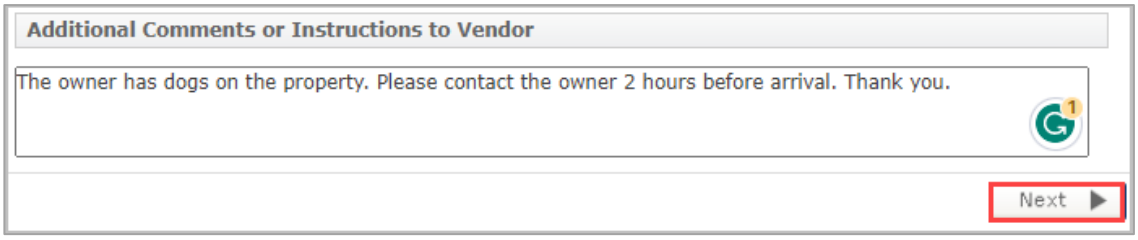
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Step	Action
5.	In the *Broker Information* section, complete the following fields and use the drop-downs when provided: • **Broker Name** • **Phone Number** • **Email** 
6.	In the *Contact and Access Information* section, complete the following fields and use drop-downs, as appropriate: • **Occupancy** • **Borrower:** Name, Phone Number, Email • **Owner:** Name, Phone Number, Email • **Agent:** Name, Phone Number, Email • **Appointment Contact** 

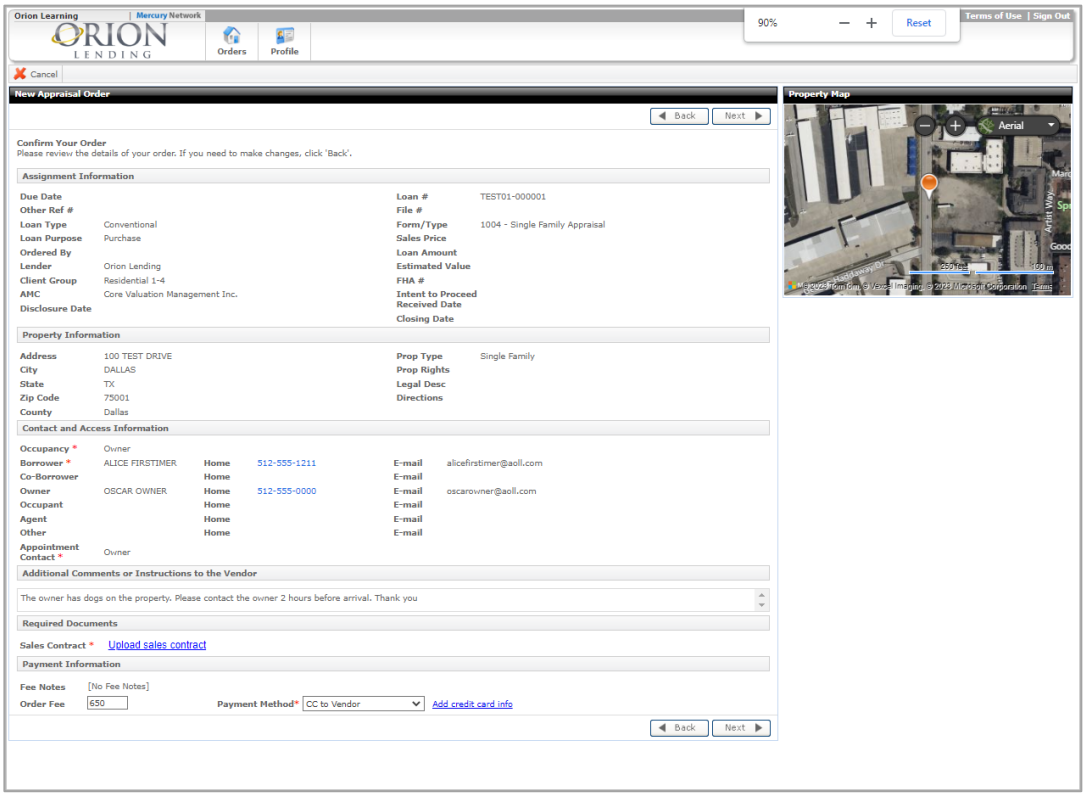
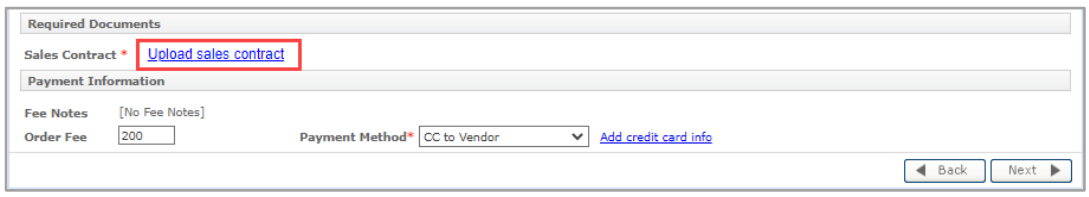
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<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>7.</td><td>Determine if Additional Notification Recipients or Additional Comment or Instructions to Vendor need to be entered.
<table>
<tr><th>If</th><th>Then</th></tr>
<tr><td>Additional Notification Recipients need to be entered.</td><td>Enter the additional email address(es) separated by semicolons (;) in the Additional Notification Recipients field.

</td></tr>
<tr><td>Additional Comment or Instructions to Vendor need to be entered.</td><td>Enter applicable comments or information in the Additional Comment or Instructions to Vendor field.

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<tr><td>8.</td><td>Click the Next button.

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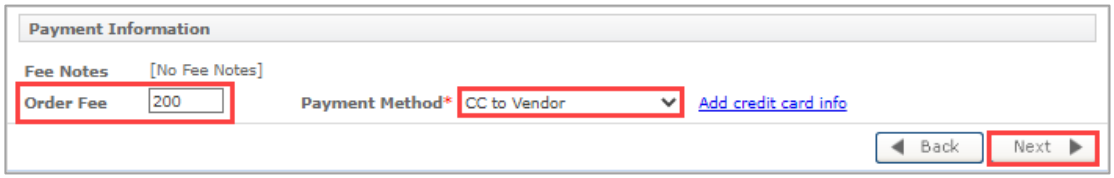
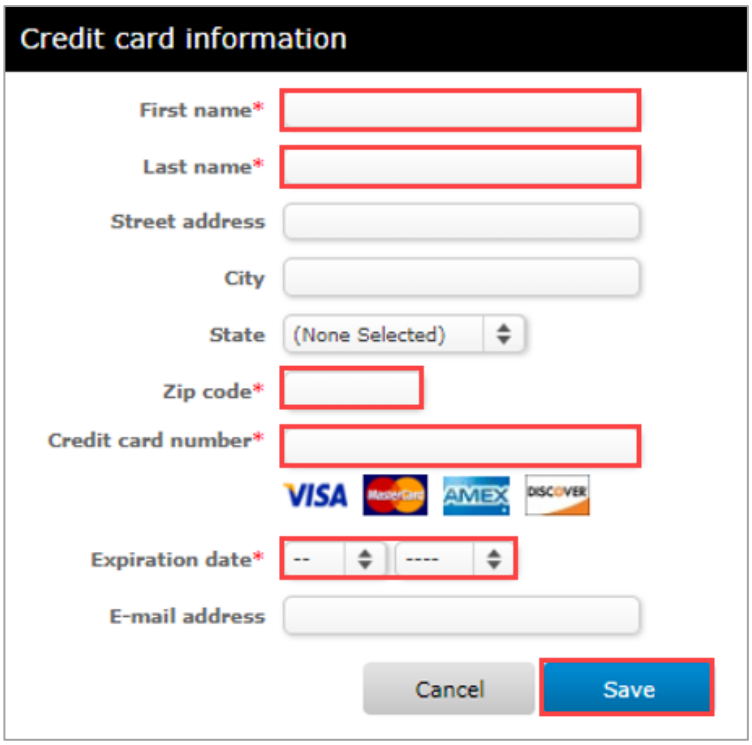
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Step	Action
9.	Once the *New Appraisal Order Summary* appears, validate that all information is correct. 
10.	Click the **Upload Sales Contract** hyperlink and upload the *Sales Contract* for purchase transactions. 

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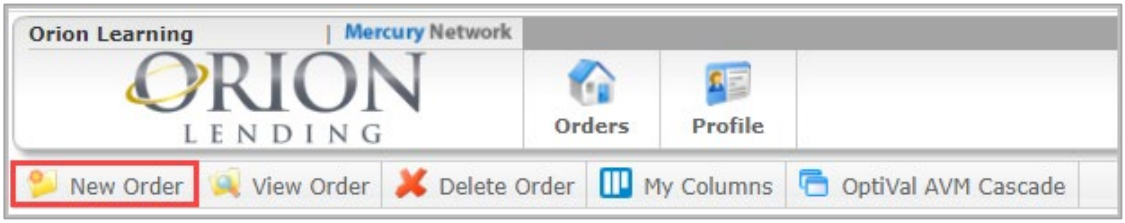
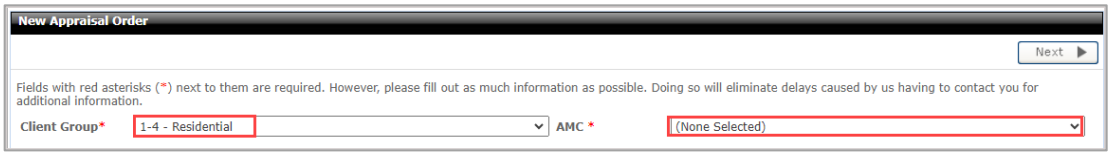
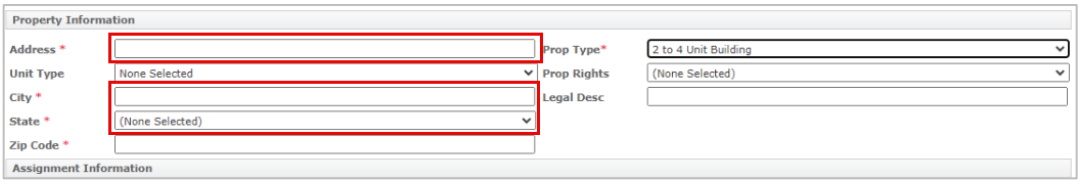
Step	Action
11.	In the *Payment Information* section, confirm or adjust the **Order Fee**, and use the **Payment Method** drop-down to select the payment method. Click the **Next** button. **Note**: If payment is not entered, canceled, or is not approved, the order will be saved and placed On Hold.  **Note**: The *Credit Card Information* screen will display. Enter all required fields that are identified with a red asterisk (*) and click the **Save** button. 

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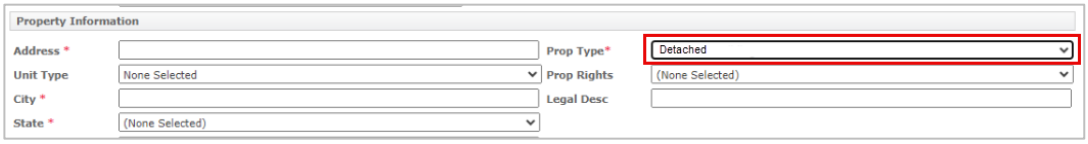
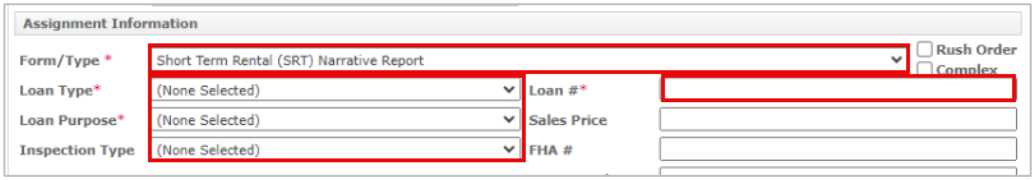
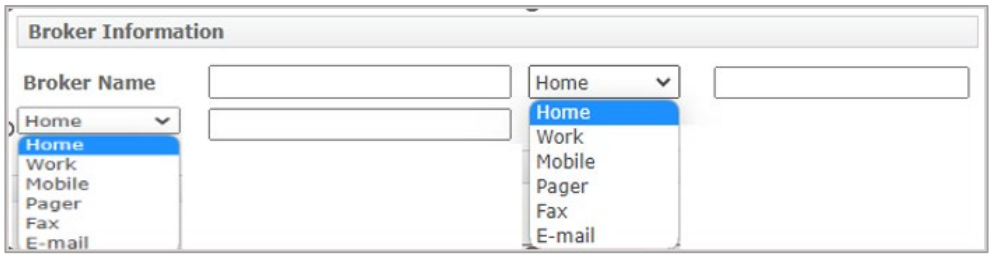
Short Term Rentals

Complete the order with the details captured below for a Short Term Rental (STR) Narrative Report.

Step	Action
1.	Click the **New Order** button in the header. 
2.	In the *New Appraisal Order* screen, complete the following: • Select the **Client Group** as **1 – 4 – Residential**. • Select the appropriate **AMC**. 
3.	In the *Property Information* section, complete the following fields and use drop-downs when provided. • **Address** • **City** • **State** • **Zip Code** 

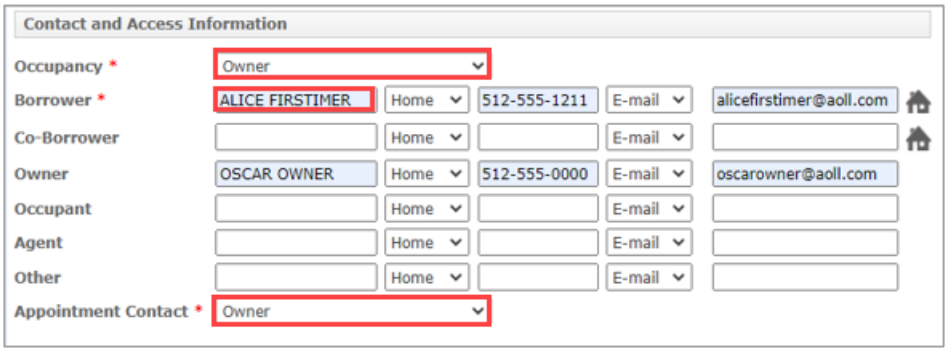
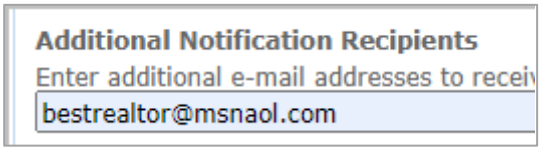
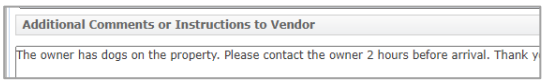
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Step	Action
4.	Select the appropriate **Prop Type**. 
5.	In the *Assignment Information* section, complete the following fields and use drop-downs when provided. • **Form/Type**: Select the **Short Term Rental (STR) Narrative Report** option. • **Loan Type** • **Loan Purpose** • **Inspection Type** • **Loan #** **Note**: *"An Accurate loan number is critical as it allows our system to auto file your report and task our appraisal team once the report is complete."* 
6.	In the *Broker Information* section, complete the following fields and use the drop-downs when provided: • **Broker Name** • **Phone Number** • **Email** 

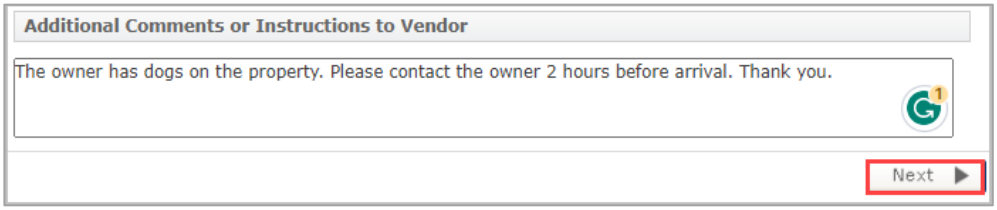
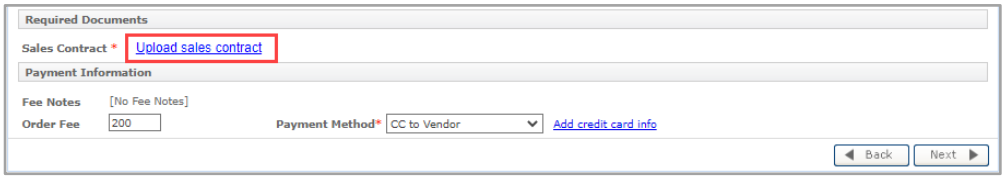
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Occupancy
Borrower: Name, Phone Number, Email
Owner: Name, Phone Number, Email
Agent: Name, Phone Number, Email
Appointment Contact

</td></tr>
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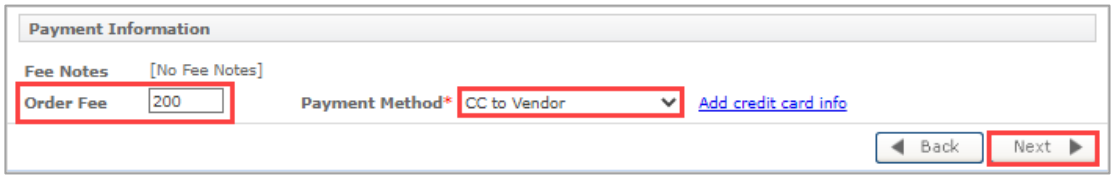
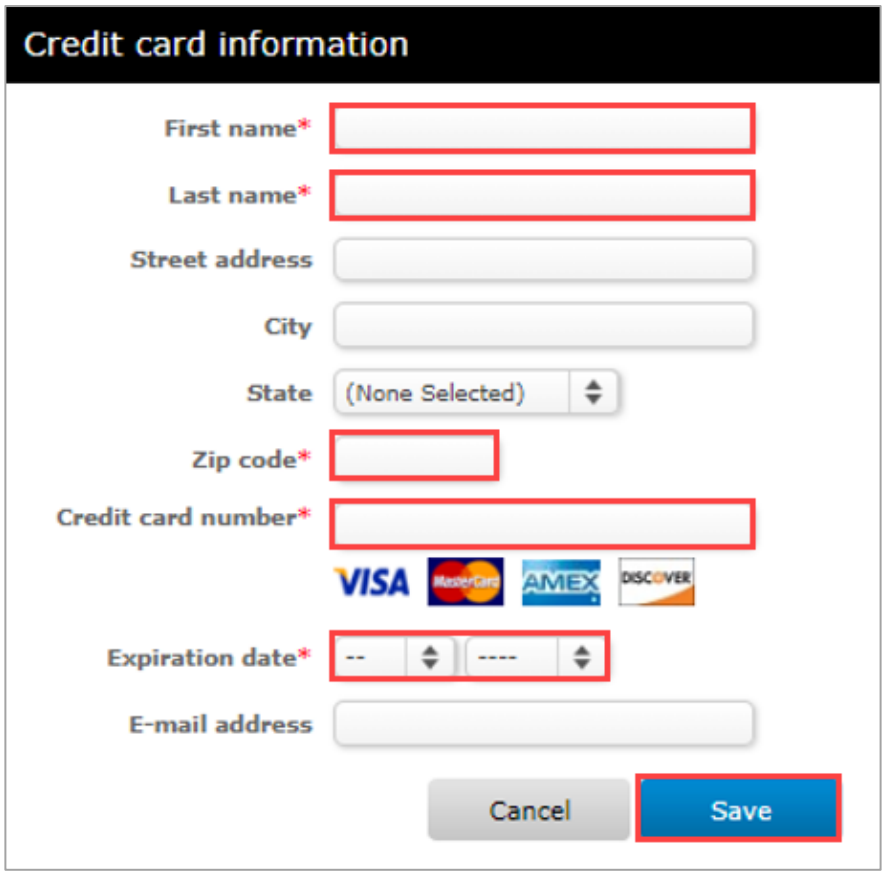
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Step	Action
9.	Click the **Next** button. 
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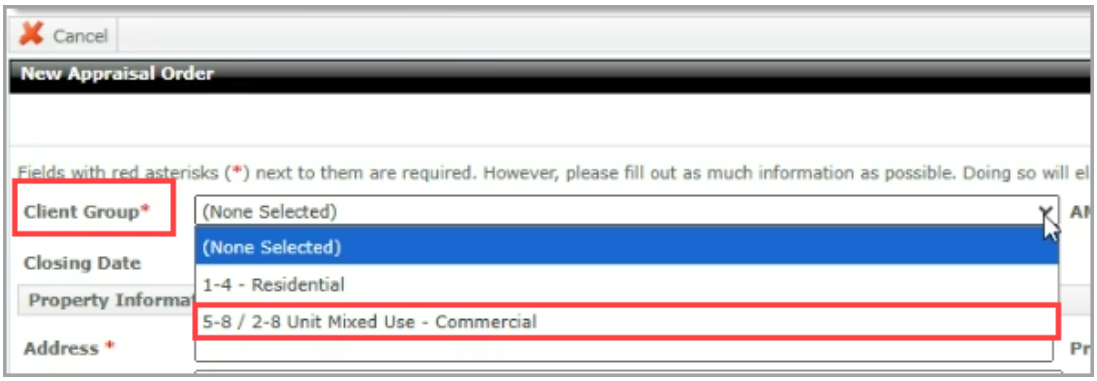
Step	Action
12.	In the *Payment Information* section, confirm or adjust the **Order Fee**, and use the **Payment Method** drop-down to select the payment method. Click the **Next** button. **Note**: If payment is not entered, canceled, or is not approved, the order will be saved and placed On Hold.  **Note**: The *Credit Card Information* screen will display. Enter all required fields that are identified with a red asterisk (*) and click the **Save** button. 

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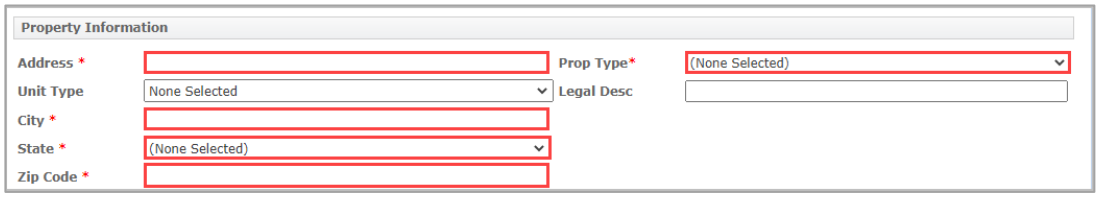
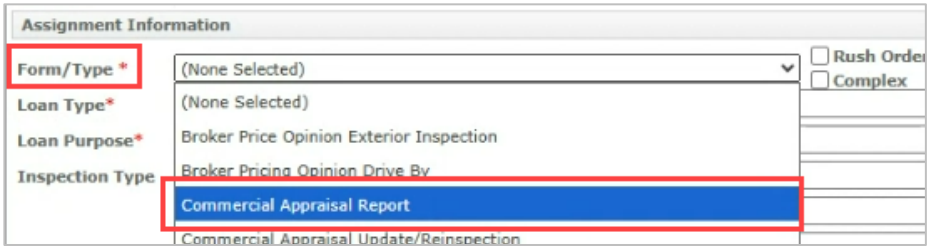
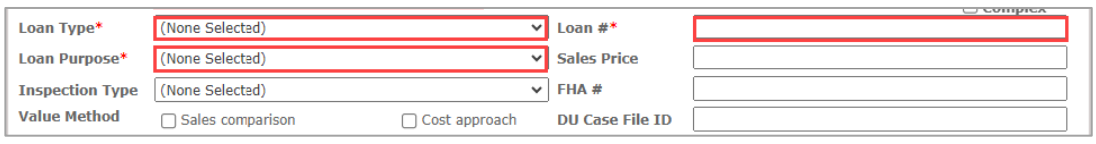
Commercial Appraisal

This designation is used for all 2-4 unit mixed use properties.

Step	Action
1.	Click the **New Order** button in the header. 
2.	In the *New Appraisal Order* screen, select **5-8 / 2-8 Unit Mixed Use – Commercial** from the **Client Group** dropdown and the appropriate AMC. 

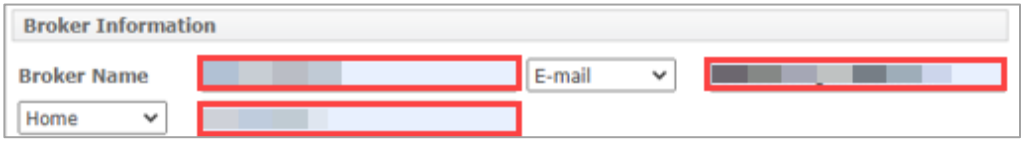
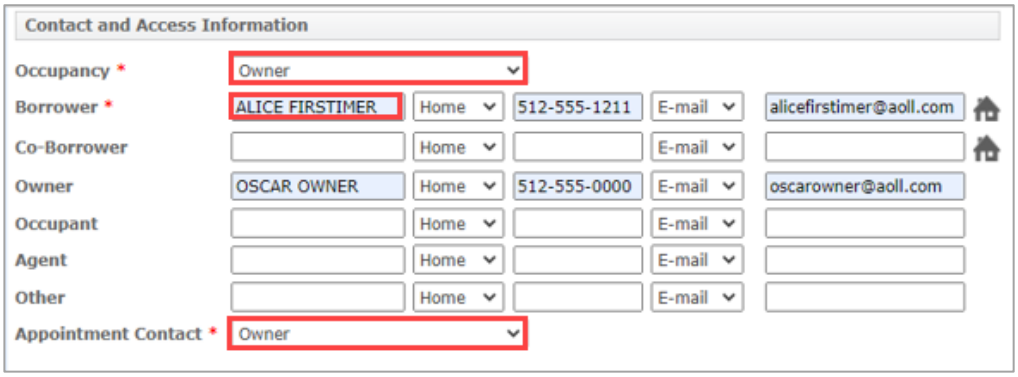
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Step	Action
3.	In the *Property Information* section, complete the following fields and use drop-downs when provided. • **Address** • **City** • **State** • **Zip Code** • **Prop Type** 
4.	Select **Commercial Appraisal Report** in the **Form/Type** dropdown box. 
4.	Complete the following fields and use drop-downs when provided. **Note**: This loan number must match the STAR loan number for direct import of the appraisal documents into Orion's loan origination system. Please do not enter more than one loan number (i.e.: DPA loans) in this order. FHA appraisals cannot be ordered until a current/updated FHA Case Number is assigned. • **Loan Type** • **Loan Purpose** • **Inspection Type** • **Loan #** 

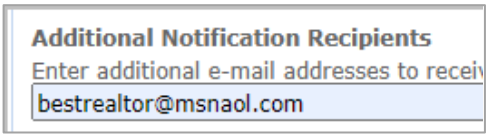
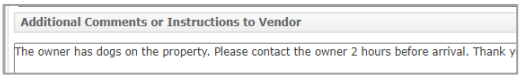
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Step	Action
5.	In the *Broker Information* section, complete the following optional fields, use drop-downs when provided. • **Broker Name** • **Email** • **Phone Number** 
6.	In the *Contact and Access Information* section, complete the following fields and use drop-downs when provided. • **Occupancy** • **Borrower:** Name, Phone Number, Email • **Owner:** Name, Phone Number, Email • **Agent:** Name, Phone Number, Email • **Appointment Contact** 

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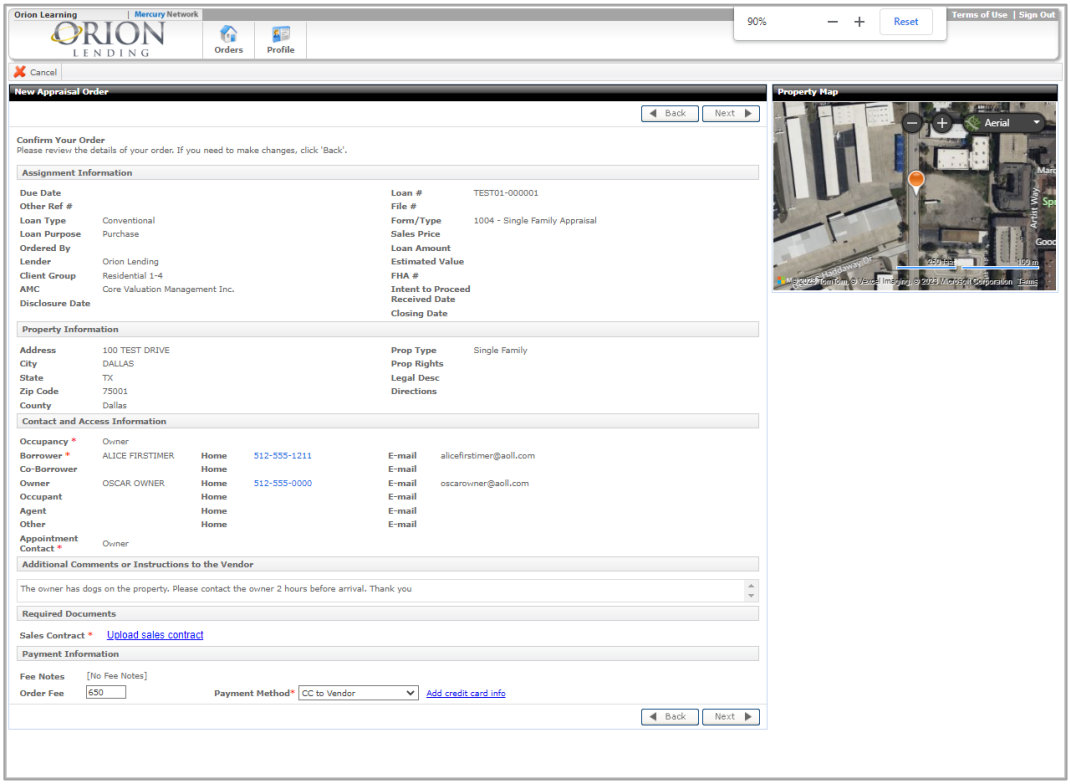
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<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>7.</td><td>Determine if Additional Notification Recipients or Additional Comment or Instructions to Vendor need to be entered.
<table>
<tr><th>If</th><th>Then</th></tr>
<tr><td>Additional Notification Recipients need to be entered.</td><td>Enter the additional email address(es) separated by semicolons (;) in the Additional Notification Recipients field.

</td></tr>
<tr><td>Additional Comment or Instructions to Vendor need to be entered.</td><td>Enter applicable comments or information in the Additional Comment or Instructions to Vendor field.

</td></tr>
</table></td></tr>
<tr><td>8.</td><td>Click the Next button.

</td></tr>
</table>

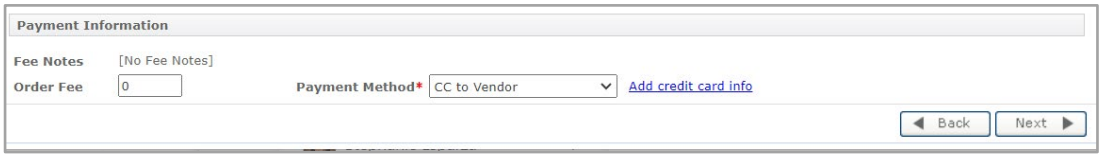
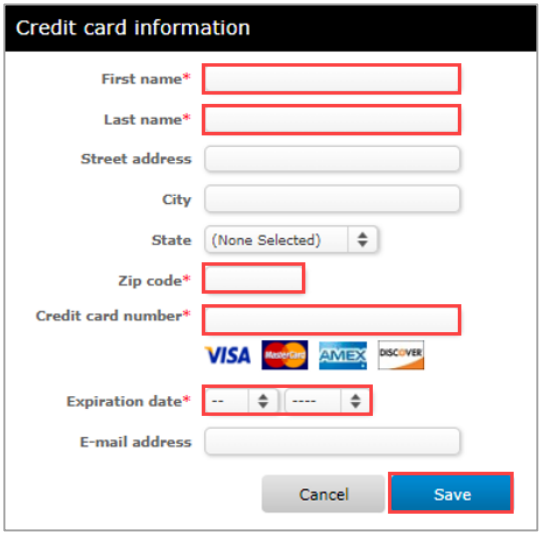
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Step	Action
9.	Once the **New Appraisal Order** appears, validate all information is correct. 
10.	In *Required Documents* section, click the **Upload Sales Contract** hyperlink, and upload the *Sales Contract*. 

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Step	Action
11.	Commercial Orders require a bid process where the order is sent to a group of eligible appraisers to determine: • **Appraisal Cost** • **Estimated Completion Date** **Note**: Commercial Orders take additional time over residential orders. Please plan your lock and closing dates accordingly.
12.	In the *Payment Information* section, use the **Payment Method** drop-down to select the payment method. Click the **Next** button. **Note**: If payment is missing, canceled, or is not approved, the order will be saved and placed On Hold. 
13.	Complete the credit card information and click **Save**. **Note**: The Credit Card is not charged until the fee has been confirmed and approved by you. 

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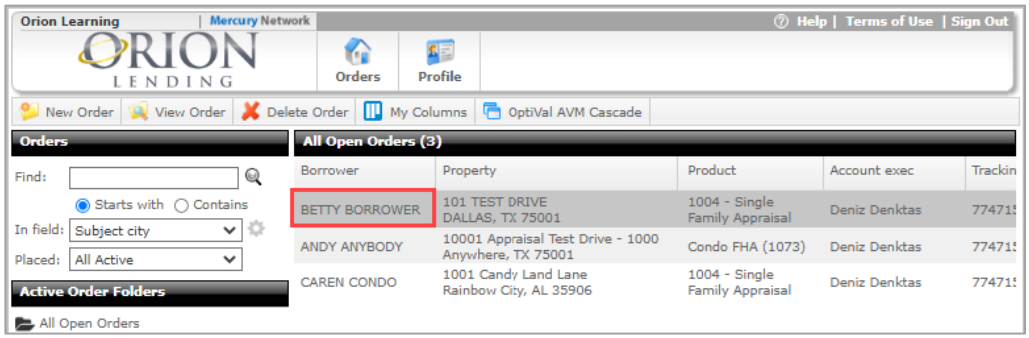
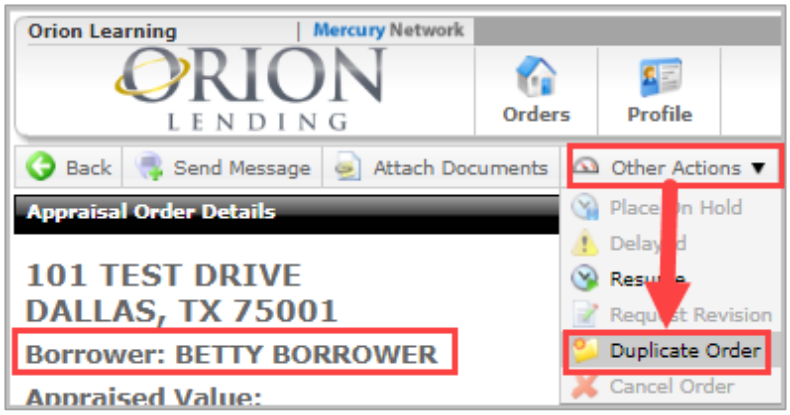
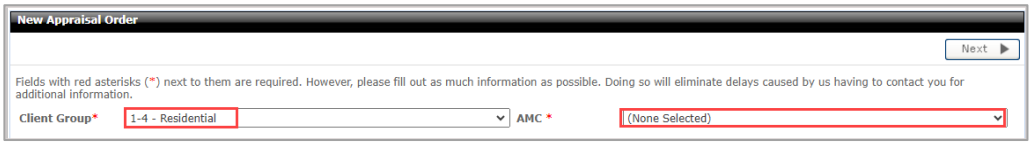
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<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>14.</td><td>When the bid process is complete, you will be notified via Mercury Network regarding the cost and estimated completion date.
<table>
<tr><th>If</th><th>Then</th></tr>
<tr><td>Cost and Estimate Completion Date are acceptable, and you have already completed payment information.</td><td>You must Send Message approving the charge amount to proceed with the charge and order.</td></tr>
<tr><td>Cost and Estimate Completion Date are not acceptable.</td><td>You may begin the order process with a different AMC.</td></tr>
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</table>

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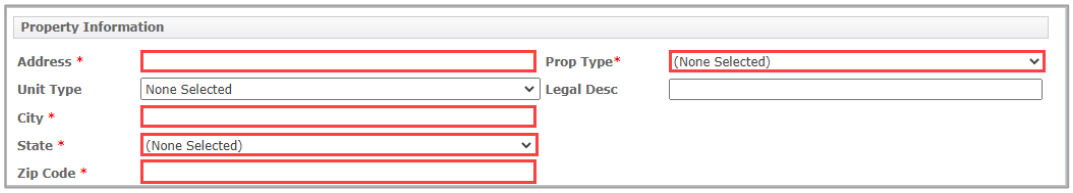
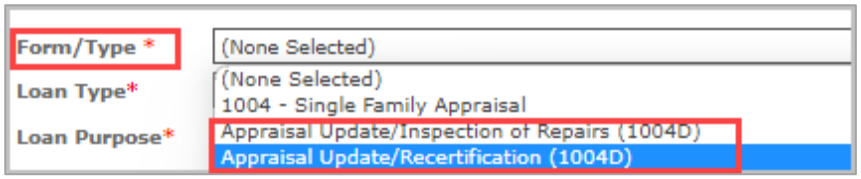
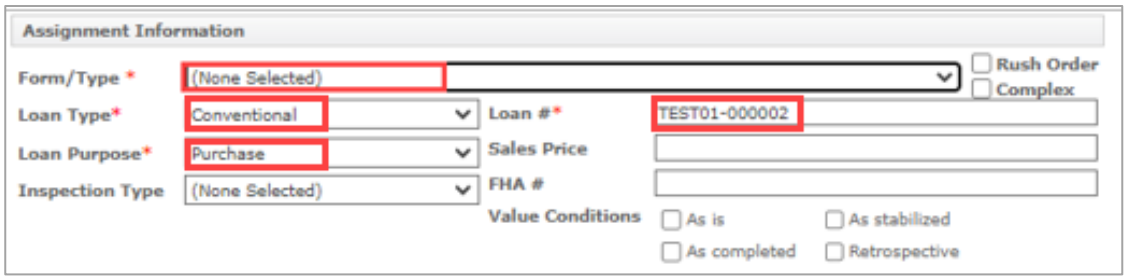
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Ordering a FNMA 1004D

Step	Action
1.	In the *All Open Orders* section, double-click the applicable order to order a *1004D*. 
2.	Click the **Other Actions** drop-down, and select **Duplicate Order**. 
3.	In the *Client Group* section, verify that the **Client Group** and **AMC** auto-populate with the original appraisal order information. 

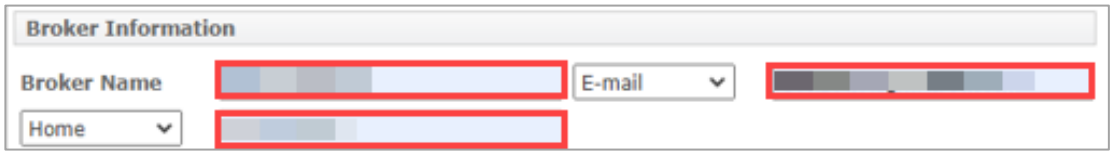
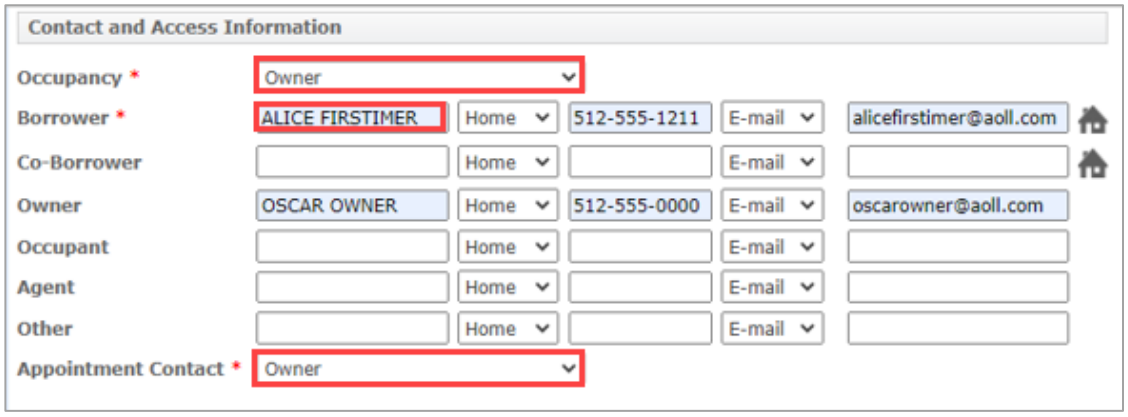
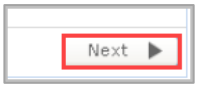
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Step	Action
4.	In the *Property Information* section, complete the following fields and use drop-downs when provided. • **Address** • **City** • **State** • **Zip Code** • **Prop Type** 
5.	In the *Assignment Information* section, click the **Form/Type** drop-down, and select **Appraisal Update/Inspection of Repairs (1004D)** or **Appraisal Update/Recertification (1004D)** as applicable. 
6.	Verify the following fields are accurate: • **Form Type** • **Loan Type** • **Loan Purpose** • **Loan #** 

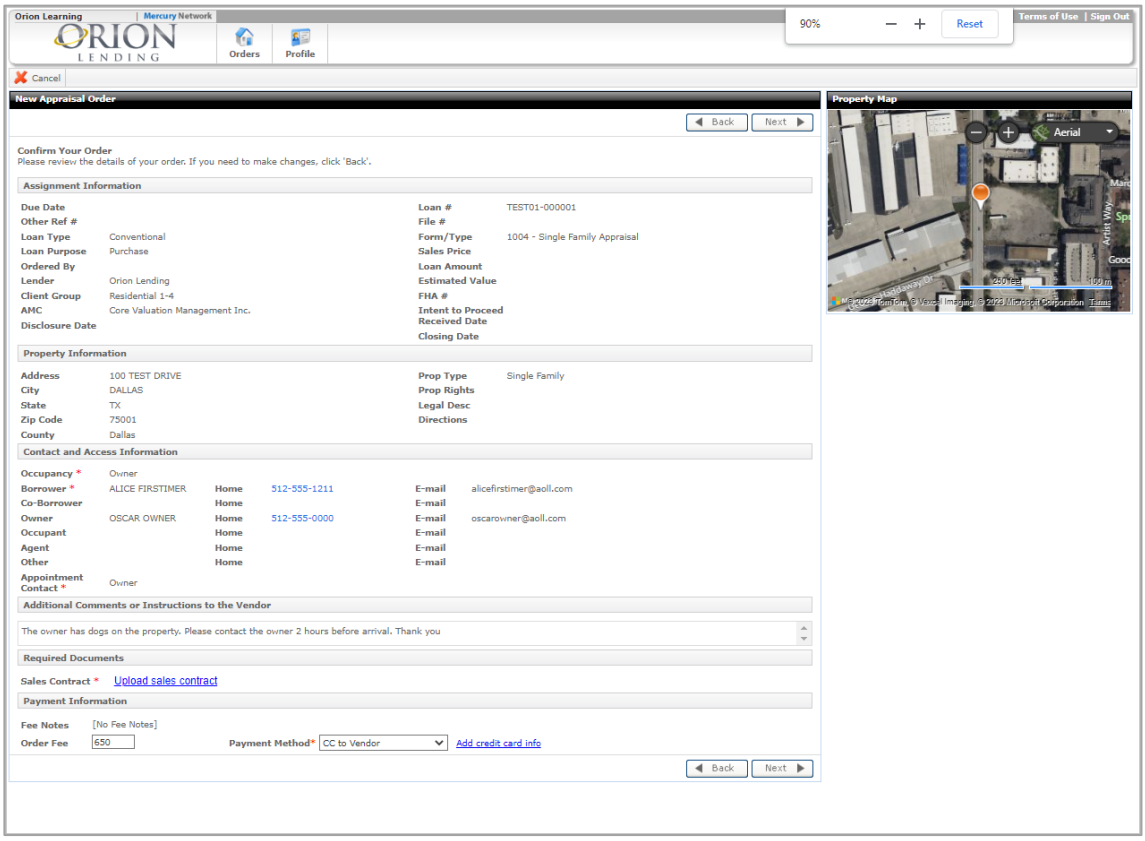
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Step	Action
7.	In the *Broker Information* section, complete the following optional fields: • **Broker Name** • **Email** • **Phone Number** 
8.	In the *Contact and Access Information* section, complete the following fields and use drop-downs when provided. • **Occupancy** • **Borrower:** Name, Phone Number, Email • **Owner:** Name, Phone Number, Email • **Agent:** Name, Phone Number, Email • **Appointment Contact** 
9.	Click the **Next** button. 

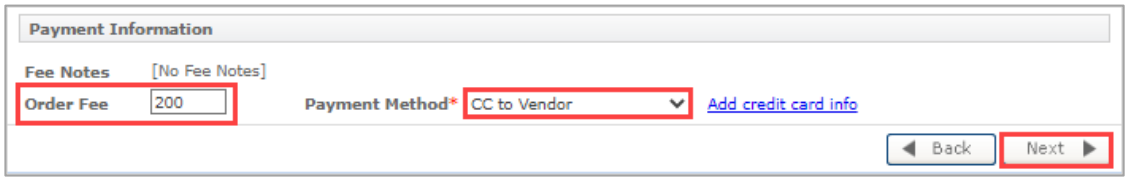
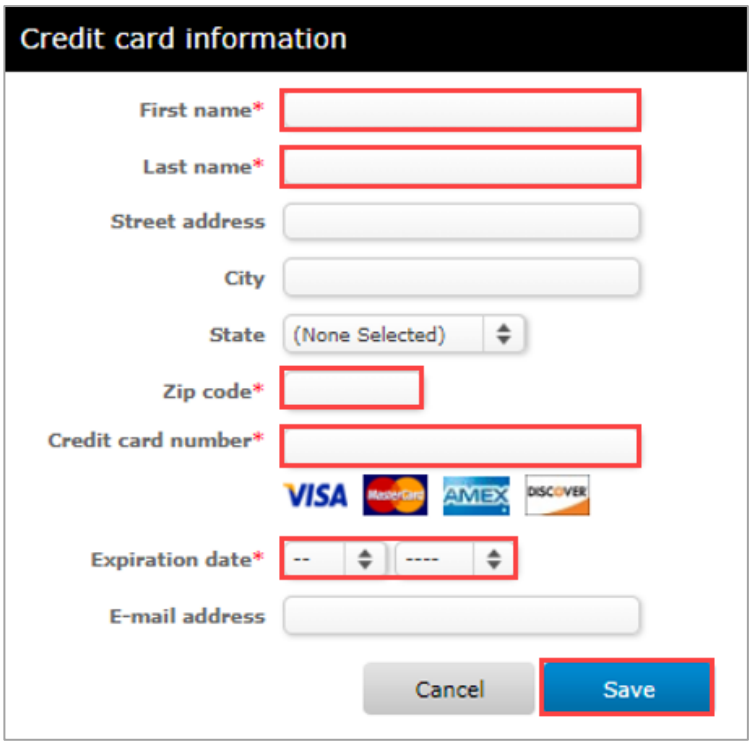
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Step	Action
10.	Once the *New Appraisal Order Summary* appears, validate that all information is correct. 
11.	Click the **Upload Sales Contract** hyperlink, and upload the *Sales Contract* for purchase transactions. 

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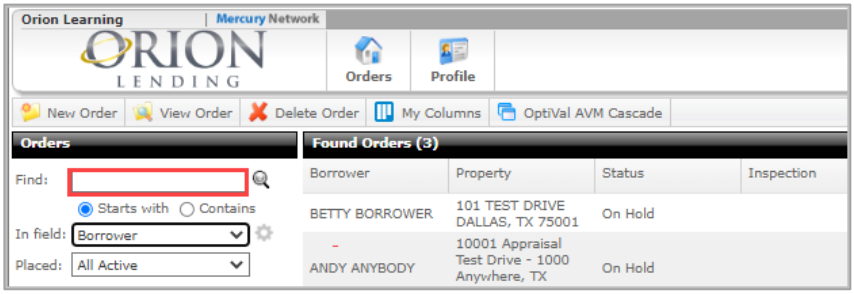
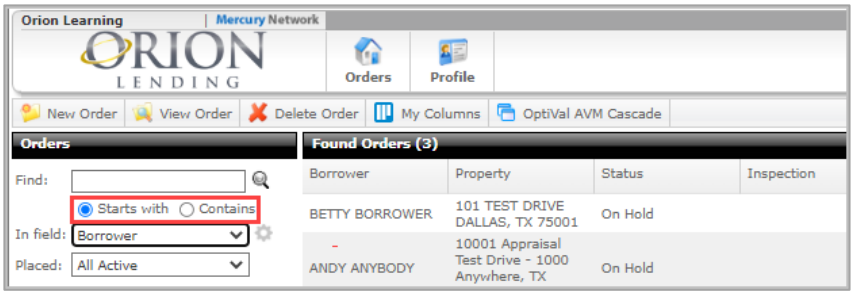
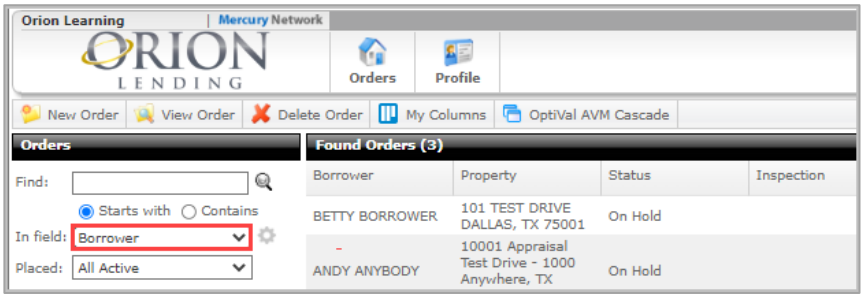
Step	Action
12.	In the *Payment Information* section, confirm or adjust the **Order Fee**, and use the **Payment Method** drop-down to select the payment method. Click the **Next** button. **Note**: If payment is not entered, canceled, or is not approved, the order saves and placed "On Hold".  **Note**: The *Credit Card Information* screen display. Enter all required fields that are identified with a red asterisk (*) and click the **Save** button. 

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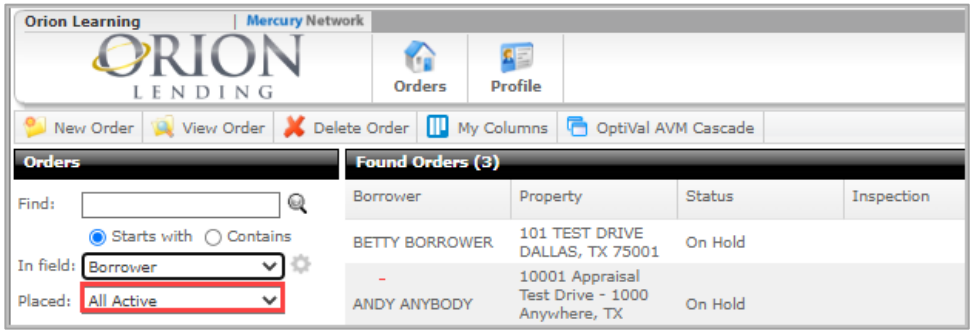
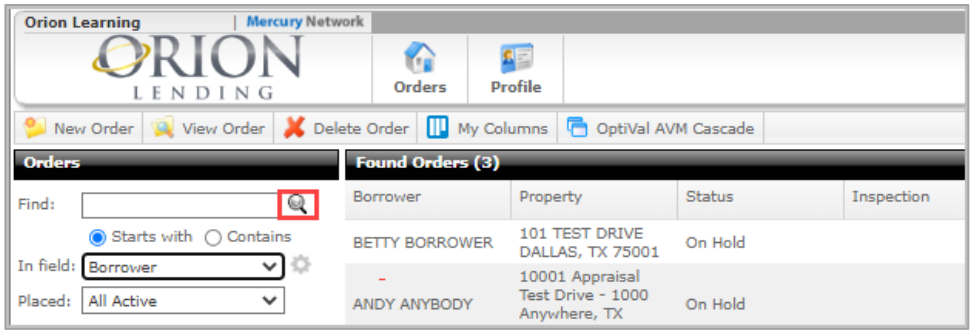
Managing Existing Orders

Searching for an Order

Step	Action
1.	In the *Orders* section, type the search criteria into the **Find** box. 
2.	Select the appropriate radio button to search for an item that **Starts With** or **Contains** with the search criteria. 
3.	Select the appropriate search field in the **In Field** drop-down. 

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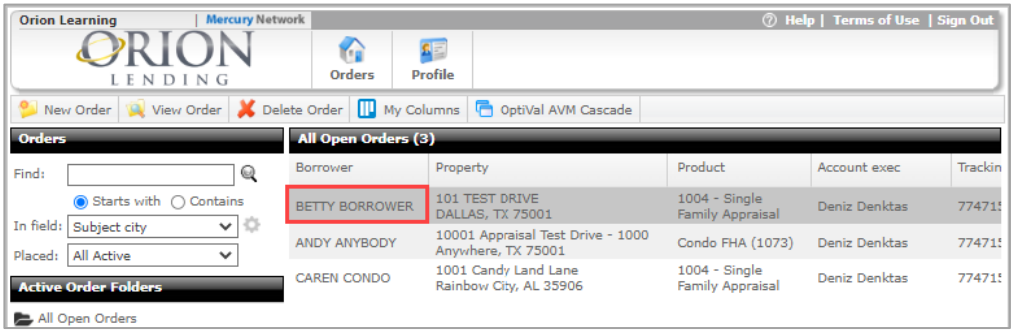
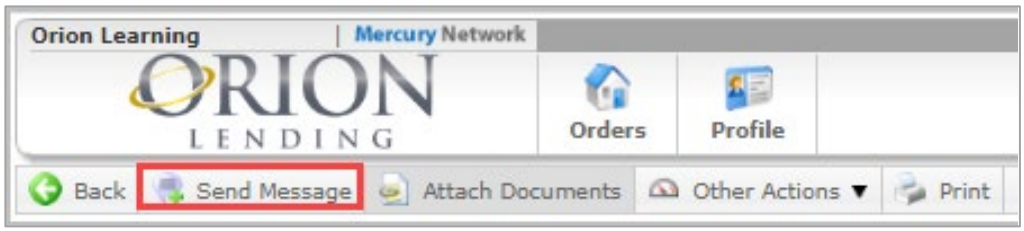
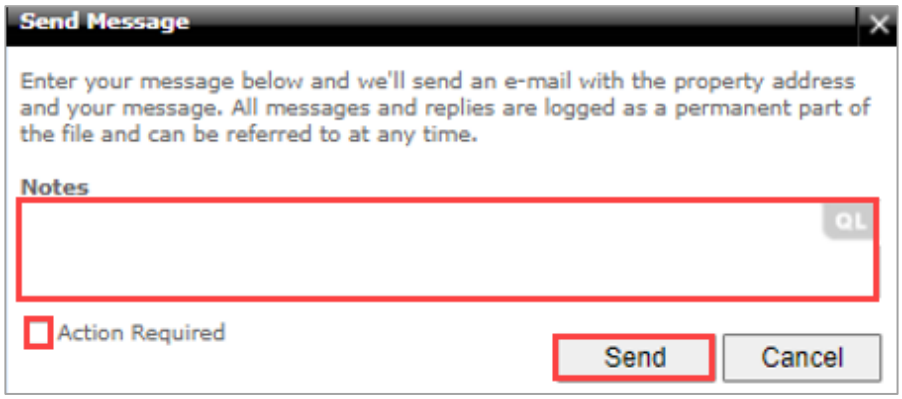
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Step	Action
4.	Select **Timeframe** from the **Placed** drop-down. 
5.	Click the **Magnifying Glass** icon () or press **Enter** to execute the search. 
6.	The search results appear in the *Found Orders* section. Double-click on the order to open to review the **Appraisal Order Details**. 

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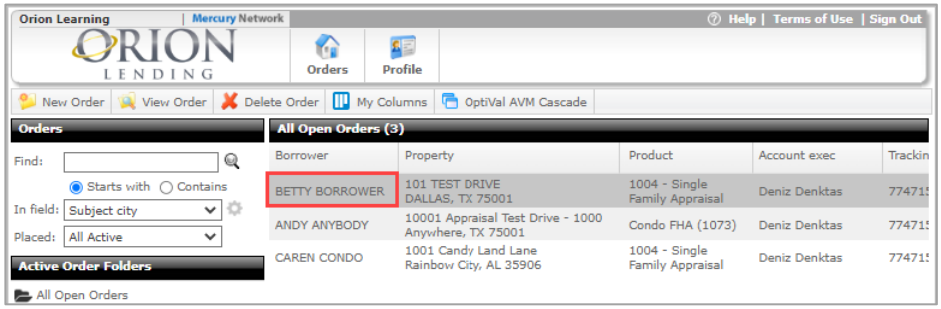
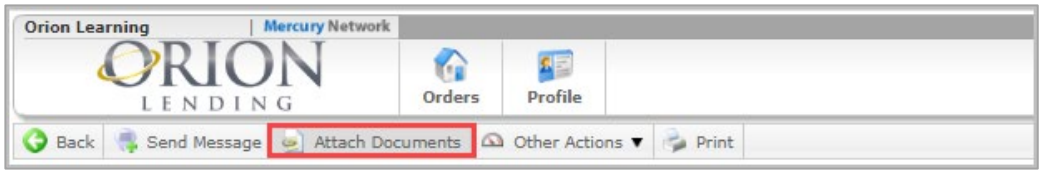
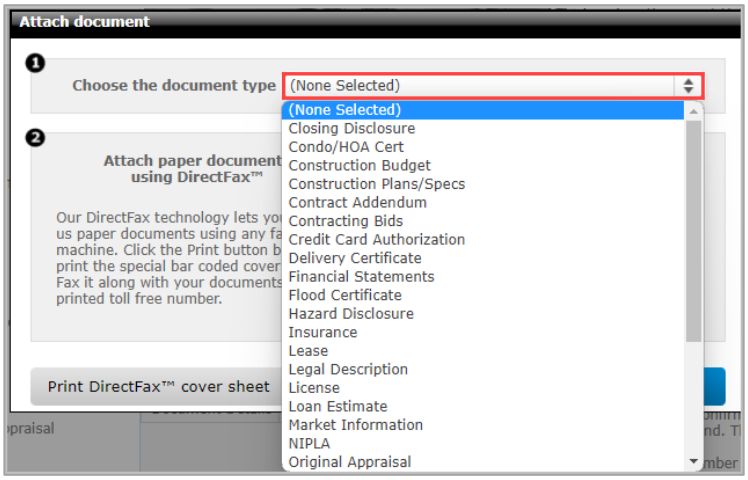
Sending Messages

Step	Action
1.	In the *All Open Orders* section, double-click on the order, to send a message to another party regarding an order. 
2.	Click the **Send Message** button. 
3.	In the *Send Message* section, enter applicable **Notes**, check the **Action Required** box if needed, and click **Send**. 

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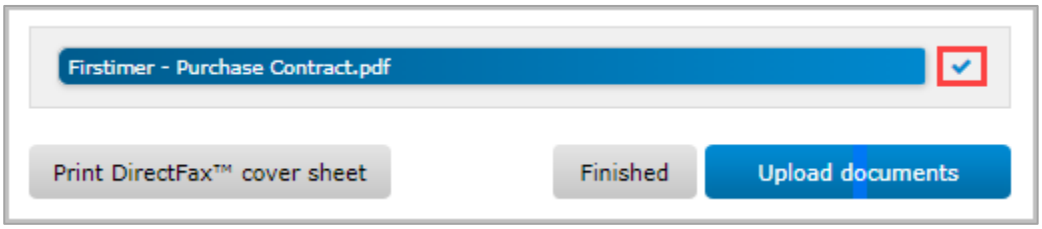
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Attaching Documents

Step	Action
1.	In the *All Open Orders* section, locate and double-click on the order you'd like to open by double-clicking on the order. 
2.	In the header, click the **Attach Documents** button. 
3.	In *Section 1*, click the **Document Type** drop-down, and select the **Document** to upload. 

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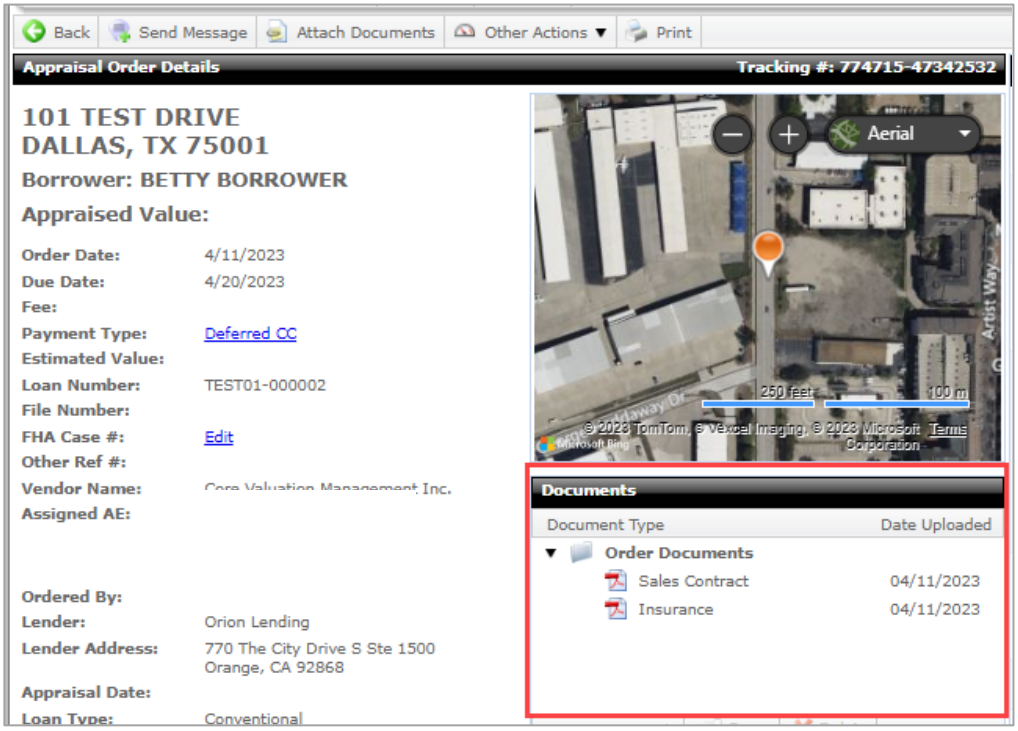
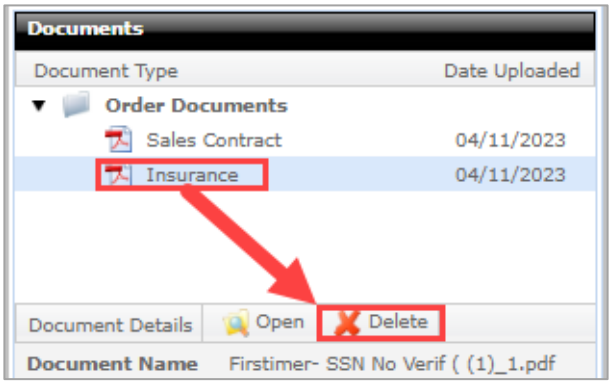
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Step	Action
4.	Select the **Upload Documents** button.  **Note**: To fax documents, click the **Print DirectFax Cover Sheet** button. 
5.	Confirm the **Green Checkmark** displays, indicating that the documents were uploaded successfully. 
Repeat Steps 3 – 5, as applicable.	
6.	Click the **Finished** button. 

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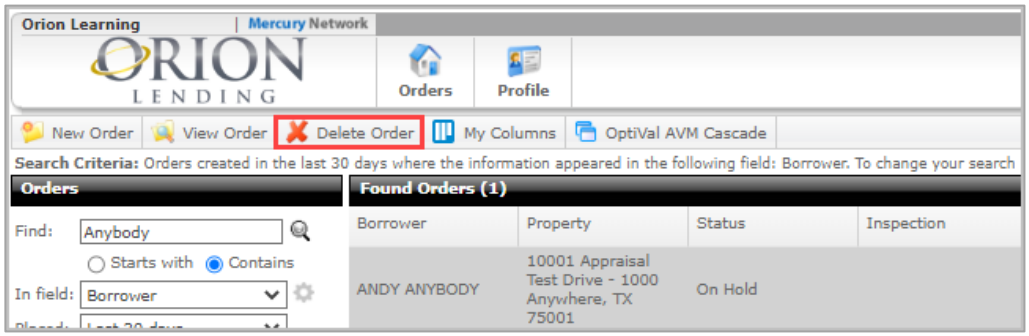
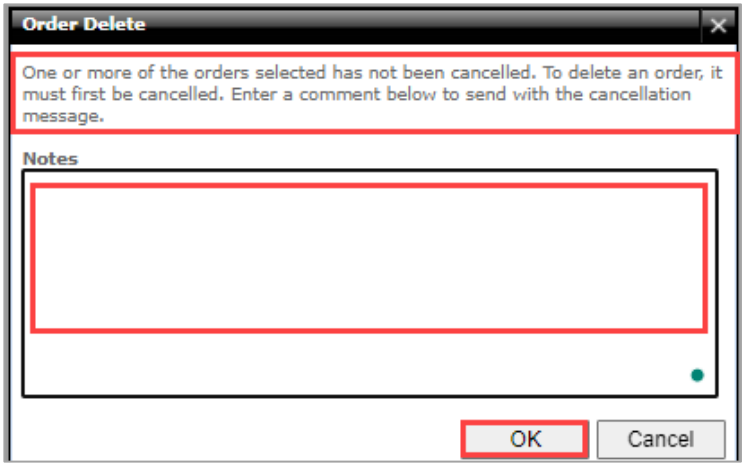
Deleting Uploaded Documents

Step	Action
1.	On the *Appraisal Order Details* screen, review uploaded **Documents** in the *Documents* section. 
2.	Select the document to delete, and click the **X Delete** button. 

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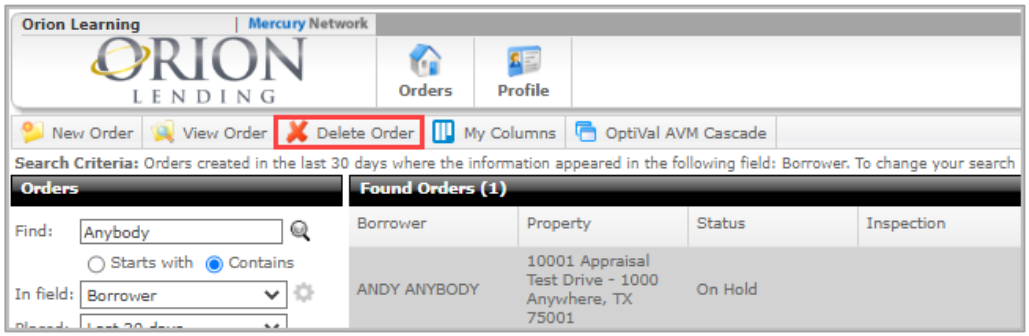
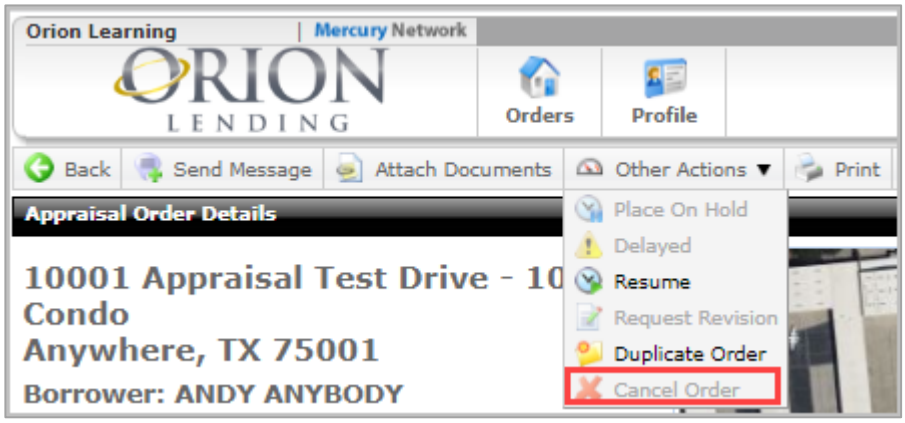
Deleting an Order

Step	Action
1.	Click the **Delete Order** button in the header. 
2.	Review the **Order Delete** message and complete the *Notes* section. Click the **OK** button. 

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Canceling an Order

Step	Action
1.	Click the **Delete Order** button in the header. 
2.	Click the **Other Actions** drop-down, and select the **Cancel Order** button. 

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