

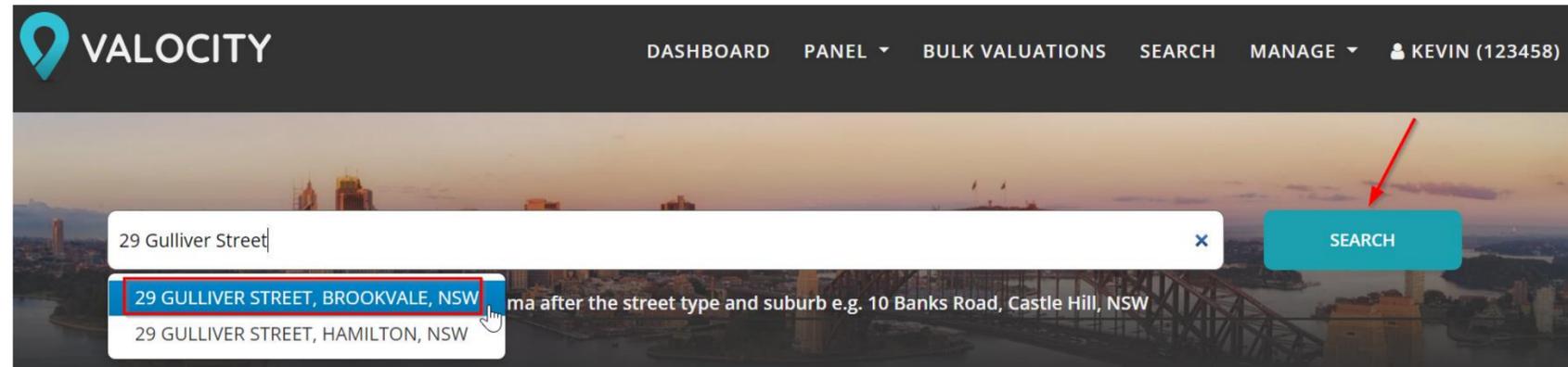
VALOCITY PLATFORM USER GUIDE

ORDERING A RESIDENTIAL VALUATION

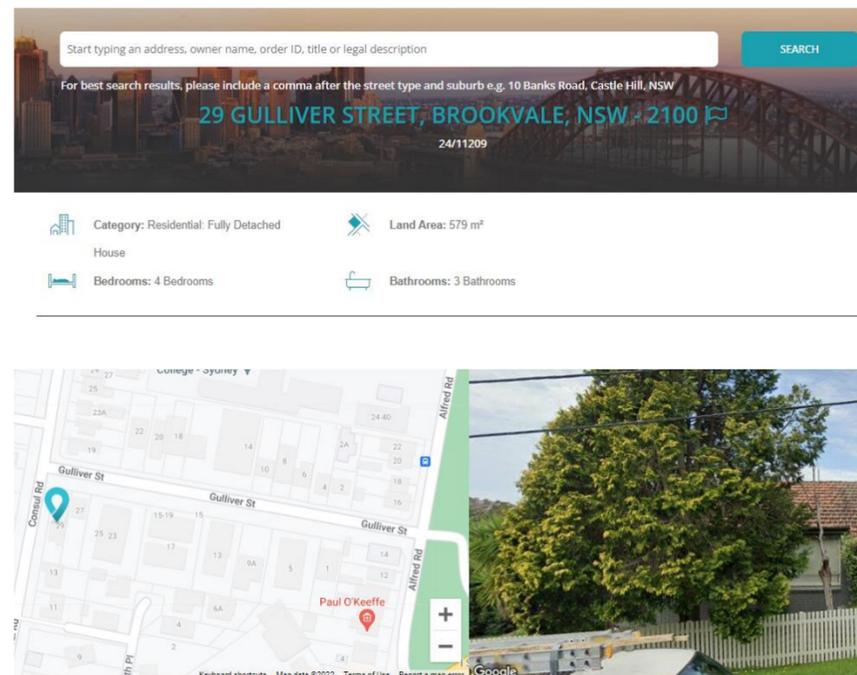
ORDERING A VALUATION

Searching for your Residential Property

- Search for a property by typing in the address and select the correct option from the pre-populated drop-down list. Please note that selecting an option from the drop list will return the most accurate result rather than typing the full address. If no address appears you will need to create a temporary property



- Once the property landing page has loaded, scroll to the bottom of the page and click "Order a Residential Valuation"



What would you like to know about this property?



Order information



ORDERING A VALUATION

Report Types

29 GULLIVER STREET, BROOKVALE, NSW

Existing Valuations

Order N°	Customer name	Lender company	Firm	Consultant name	Status	Due Date	Completed Date
There are no existing valuations for this property							

[TO PROPERTY DETAIL](#) [ORDER RESIDENTIAL VALUATION](#)

Request a valuation (type indicated by Decision rules)

- From here, a pop-up iDecision engine will load where you will be required to complete the form – please note the mandatory fields.
- Once you have entered in the details required, the Valocity engine will provide you with the different options for 'Valuation Types' available.
- Select the type by clicking on the appropriate button.

29 GULLIVER STREET, BROOKVALE, NSW

Address To*

All applications for credit are subject to Remara Investment Management Pty Ltd credit approval criteria.

Customer Name* Test Customer Number 123456789

Loan Reference 123123 Loan Amount* \$1,000,000

Loan Type Purchase Property Type* Fully Detached House

Risk Flags

Off plan/Newly Constructed Favourable Purchase Guarantor Security Company Title

COS Price* \$2,000,000 COS Date* 17/04/2023

[GET VALUATION TYPE](#)

[ORDER AVM](#) [ORDER DESKVAL](#) [ORDER FULL VALUATION](#) [EXIT](#)

ORDERING A VALUATION

Ordering Page

- From here, there will be slightly different ordering forms based on the "Valuation Type" selected. You will be required to complete all the valuation/property information inputted into the mandatory fields
- Once this is complete you can then **"Continue to Summary"**

Comments

Any additional information about the property that may be of relevance to the order

CONTINUE TO SUMMARY **CANCEL**



New Full Market Valuation

29 GULLIVER STREET, BROOKVALE, NSW - 2100

DIPID: AU13213778 , Legal Description: 24/11209

Company Name	
Lender Name	Kevin Remara
Lender Phone*	0411111111
Estimated Completion Date	Valuation orders will be completed in 48 hours from date of payment. * Please note this will be based on valuer availability.
Customer Number	CC123456
Application Reference	123123
Property Type*	Fully Detached House
Loan Purpose*	New Purchase
Purchase Price*	\$1,000,000
Loan Amount*	\$600,000
Customer's Contact Details*	Testing
	test@test.com.au
	0400000000
	Customer's mobile
Property Access Details	<input type="checkbox"/> Separate contact for access
	Access contact's name
	Access contact's email
	Access contact's phone
	Access contact's mobile

ORDERING A VALUATION

Summary Page

- The summary page is designed for you to be able to do a final review of your order. There are multiple actions that can be taken from here (see below):
- **CHANGE ORDER:** This action will allow you to return to the Customer Contact Details and Property Access Details to make any changes or amendments as necessary.
- **ATTACH FILES:** The action will allow you to attach any supporting documentation as required.
- **CANCEL ORDER:** Cancels the order.
- **REASSIGN OWNER:** Ability to reassign the owner of the order or add multiple owners. Owners will receive email updates on the order.
- **SELECT FIRM:** By clicking this button, you have the ability to select the firm you wish to complete the order. A list of eligible firms for that report type within the geographic region will appear in the drop-down. Once you have selected the firm, click "Update"
- **PROCEED WITH QUOTE:** Clicking on 'proceed with quote' will automatically request a quote from a predetermined panel of valuation firms and quantity surveyors.

Summary

Finance for 29 GULLIVER STREET, BROOKVALE, NSW - 2100	
Status	Quoting
Report Purpose	Finance for Mortgage Security Purposes.
Product Type	Full Market Valuation
Created Date	18 Apr 2023 15:05
Estimated Completion Date	Orders will be completed in 2 business days from date of payment. * Please note this will be based on consultant availability.
Address To	
Customer Reference Number	CC123456
Application Reference	123123
Purchase Price	\$1,000,000
Order Number	9SF-AWLR-ATA
Fee	\$0.00

CHANGE ORDER

ATTACH FILES

CANCEL ORDER

REASSIGN OWNER

SELECT FIRM

PROCEED WITH QUOTE

Comments

Comment

COMMENT

Order created

Tuesday 18th April 2023 15:04 by Kevin Remara |

QUOTING

Accepting & rejecting quotes

- Once the valuation firms have provided a quote, an email will be sent to the requester/owner advising that a quote is available for review in the “**Comments and Actions**” section of the order. From here you can **accept** the quote or **reject** the quote
- When accepting a quote, the platform will automatically reject all other quotes. From here you will be taken to the payment options

ATTACH FILES REASSIGN OWNER REASSIGN FIRM CHANGE ORDER TO DASHBOARD

Comments and Actions

COMMENT CANCEL ORDER

Comment COMMENT

Quote Submitted; Amount is \$550.00 incl. GST; SLA is 7 days: Thank you
Tuesday 18th April 2023 15:36 by Opteon property valuations and advisory services

Quote-specific comment QUOTE COMMENT

Comment ACCEPT QUOTE

Comment REJECT QUOTE

Order process started by asking for quotes from 1 firms
Tuesday 18th April 2023 15:36 by Kevin Remara

ORDERING A VALUATION

AVM and DeskVal Summary Page

- The summary page is designed for you to be able to do a final review of your order. There are multiple actions that can be taken from here (see below)
- **CHANGE ORDER:** This action will allow you to return to the Customer Contact Details and Property Access Details to make any changes or amendments as necessary.
- **CANCEL ORDER:** Cancels the order.
- **PAY NOW:** Will take the lender directly to the payment page.
- **PAY LATER:** The option to send a payment email directly to the customer with the different payment options.
- **PROCEED:** Clicking on 'proceed' will charge the valuation to the Lenders Cost Centre.

Summary

Finance for 29 GULLIVER STREET, BROOKVALE, NSW - 2100	
Status	Pending
Report Purpose	Finance for Mortgage Security Purposes.
Product Type	AVM Valuation
Created Date	18 Apr 2023 15:13
Address To	
Customer Reference Number	CC123456
Application Reference	123123
Purchase Price	\$1,000,000
Order Number	ALS-AACB-9FR
Fee	\$20.02
Total (GST Inclusive)	\$20.02

CHANGE ORDER

CANCEL ORDER

PAY NOW

PAY LATER

PROCEED

Comments

Comment

COMMENT

Order created

Tuesday 18th April 2023 15:12 by Kevin Remara

ORDERING A VALUATION

Next steps once the address has been found/created

- From here, there will be slightly different ordering forms based on the "Valuation Type" selected. You will be required to complete all the valuation/property information inputted into the mandatory fields.
- Once this is complete you can then "**Continue to Summary**".

Comments

Any additional information about the property that may be of relevance to the order

[CONTINUE TO SUMMARY](#) [CANCEL](#)

New Commercial Valuation

114 KINGAROY STREET, KINGAROY, QLD - 4610
DIPID: AU32114594 , Legal Description: 1/RP7917

Company Name

Lender Name Kevin Remara

Lender Phone * 0411111111

Property Type Please select

Risk Flags

<input type="checkbox"/> Specialised Property	<input type="checkbox"/> Highest and Best Use
<input type="checkbox"/> Multi-tenanted (more than 3 tenants)	<input type="checkbox"/> Valuation Reinstuctured
<input type="checkbox"/> Vacant Land / Future Development Site	<input type="checkbox"/> Environmental Issues including Heritage Listed / Flood Zone / Bush Fire prone area
<input type="checkbox"/> Quote (Fee and/or SLA to be quoted)	

Property Occupancy Please select

Loan Purpose Please select

Customer Number Bank reference

Application Reference * Application reference

Loan Amount Loan Amount

Customer's Contact Details *

Customer's name

Customer's email

Customer's phone

Customer's mobile

Property Access Details

Separate contact for access

Access contact's name

Access contact's email

Access contact's phone

Access contact's mobile

ORDERING A VALUATION

Summary Page

- The summary page is designed for you to be able to do a final review of your order. There are multiple actions that can be taken from here (see below):
- **CHANGE ORDER:** This action will allow you to return to the Customer Contact Details and Property Access Details to make any changes or amendments as necessary.
- **ATTACH FILES:** The action will allow you to attach any supporting documentation as required.
- **CANCEL ORDER:** Cancels the order.
- **REASSIGN OWNER:** Ability to reassign the owner of the order or add multiple owners.
- **SELECT FIRM:** by clicking this button, you have the ability to select the firm you wish to complete the order. A list of eligible firms for that report type within the geographic region will appear in the drop-down. Once you have selected the firm, click "Update"
- **PROCEED WITH QUOTE:** Clicking on 'proceed with quote' will automatically request a quote from a predetermined panel of valuation firms and quantity surveyors.

Summary

Finance for 114 KINGAROY STREET, KINGAROY, QLD - 4610	
Status	Quoting
Report Purpose	Finance for Mortgage Security Purposes.
Product Type	Commercial Valuation
Loan Purpose	Refinance
Property Type	Mixed Used Property
Risk Flags	Specialised Property
Created Date	18 Apr 2023 13:49
Estimated Completion Date	Orders will be completed in 10 business days from date of payment. * Please note this will be based on consultant availability.
Address To	
Customer Reference Number	12345
Application Reference	123456
Customer Estimated Value	\$3,000,000
Order Number	YLS-RK99-V58
Fee	\$0.00

CHANGE ORDER

ATTACH FILES

CANCEL ORDER

REASSIGN OWNER

SELECT FIRM

PROCEED WITH QUOTE

Comments

Comment

COMMENT

Order created

Tuesday 18th April 2023 13:48 by Kevin Remara

QUOTING

Accepting & rejecting quotes

- Once the valuation firms have provided a quote, an email will be sent to the requester advising that a quote is available for review in the “**Comments and Actions**” section of the order. From here you can **accept** the quote or **reject** the quote
- When accepting a quote, the platform will automatically reject all other quotes. From here you will be taken to the payment options

ATTACH FILES REASSIGN OWNER REASSIGN FIRM CHANGE ORDER TO DASHBOARD

Comments and Actions

COMMENT CANCEL ORDER

Comment COMMENT

Quote Submitted; Amount is \$550.00 incl. GST; SLA is 7 days: Thank you
Tuesday 18th April 2023 15:36 by Opteon property valuations and advisory services

Quote-specific comment QUOTE COMMENT

Comment ACCEPT QUOTE

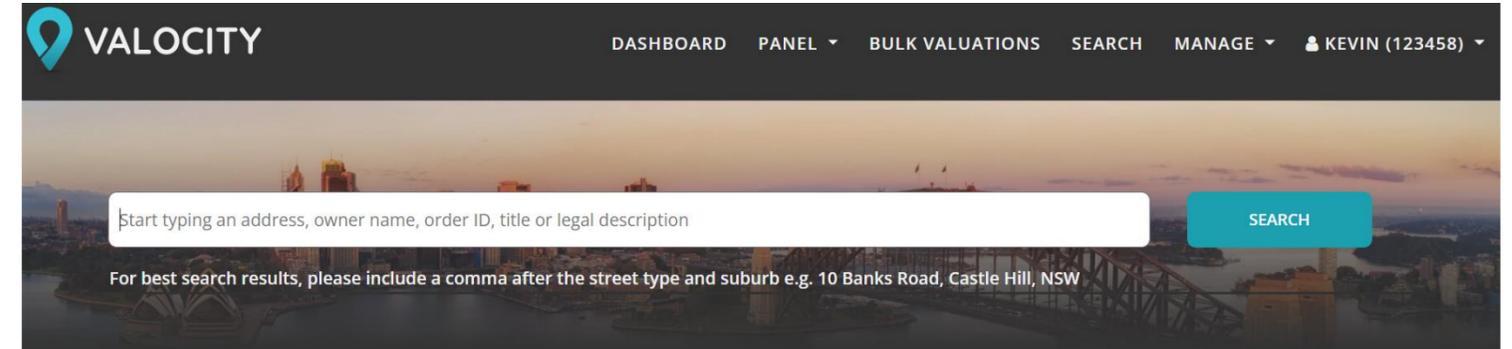
Comment REJECT QUOTE

Order process started by asking for quotes from 1 firms
Tuesday 18th April 2023 15:36 by Kevin Remara

ORDERING A VALUATION

Creating a Temporary Property

- A temporary property must only be created if no drop-down search results appear or if the property is a new build.
- The option to create a new property will appear like the image to the right.



No results found matching your search. Try a different variation of the address or, if the property cannot be found, create a new property.

CREATE PROPERTY

- All mandatory fields are highlighted to the right, that will require you to input the relevant information. You will need to ensure you select residential prior to selecting create.
- The valuation screen will appear, and you will need to select the order now button to process with the valuation order.

New property for Valuation Order

13 LITTLE AUSTINMER LANE AUSTINMER, NSW

State	NSW	▼		
Suburb	AUSTINMER	▼ or enter a new suburb r		
Postcode	2515	▼		
Street	LITTLE AUSTINMER	▼ or enter a new street na	LANE	▼
Property Type	Fully Detached House	▼		
Unit Number	Enter the unit number			
Street Number	13			
Legal Description	Enter the legal description			
Owner Names	Enter the owner names			
Certificates of Title	Enter the certificates of title			

We hold no record of the property details you have entered. Please select the 'create' button to add new record.

CANCEL

Residential

CREATE

PAYMENT METHODS

PAYMENT METHODS

Lender to Pay

- Clicking 'Proceed' will allow you to waive the fees/ customer payment and the valuation assignment packet will be triggered for completion.
- This will be charged to the Lender directly on a monthly basis.

Summary

Finance for 29 GULLIVER STREET, BROOKVALE, NSW - 2100	
Status	Pending
Report Purpose	Finance for Mortgage Security Purposes.
Product Type	AVM Valuation
Created Date	18 Apr 2023 15:13
Address To	
Customer Reference Number	CC123456
Application Reference	123123
Purchase Price	\$1,000,000
Order Number	AL5-AACB-9FR
Fee	\$20.02
Total (GST Inclusive)	\$20.02

CHANGE ORDER

CANCEL ORDER

PAY NOW

PAY LATER

PROCEED

Comments

Comment

COMMENT

Order created

Tuesday 18th April 2023 15:12 by Kevin Remara

Charge to Cost Centre - Order N^o: AL5-AACB-9FR
Order fee will be charged to your Cost Centre

Order Comment

PROCEED

PAYMENT METHODS

Pay Now

- By selecting this option, the valuation fee will need to be collected upfront before being assigned to a Valuation Firm for completion
- Selecting '**Pay Now**' will redirect you to the payment screen where you can choose between Credit Card or Account2Account transfer. Once the payment has been collected the status of the report will change to 'New' and automatically assigned to a valuation firm

Payment Options

Pay by Credit Card (1.7% surcharge will apply)

Pay by Account2Account Bank Transfer (1% up to \$3 maximum surcharge will apply)

Payment Terms and Conditions

I have read and agree to the Terms and Conditions

BACK TO SUMMARY AGREE

- The following screenshots show you what will appear if you choose Account2Account vs Credit Card. Please note you can only use the bank listed on Account2Account

Account 2 Account

Payment Checkout

Merchant Reference: AAD-BEDS-CAA
Order Line 1: Commercial Valuation
Amount: \$1708.00 (AUD)

Payment Method: Account2Account

Please select one of the currently available banking services:

- ANZ
- Bank of Melbourne
- Bendigo
- Bank West
- Commonwealth Bank
- NAB
- St. George
- Westpac

NEXT

Cancel Payment

Account 2 Account

Payment Checkout

Merchant Reference: AAD-BEDS-CAA
Order Line 1: Commercial Valuation
Amount: \$1708.00 (AUD)

Payment Method: Account2Account

Please enter your ANZ Internet Banking login credentials.

Customer Number:*

Password:*

NEXT

CANCEL

Credit Card

Payment Checkout

Merchant Reference: MBA-LBTE-EAS
Order Line 1: Commercial Valuation
Amount: \$1290.30 (AUD)

Payment Method: Credit Card

Credit Card Payment

Card Number:*

Name On Card:*

Expiry Date:*

CVC:*

Submit

Cancel Payment

Payment Checkout

Amount: \$1006.83 (AUD)

Select Payment Method

Select a payment method from the following available options:

Payment Method: G Pay

Cancel Payment

Windcave

Privacy Policy

PAYMENT METHODS

Pay later

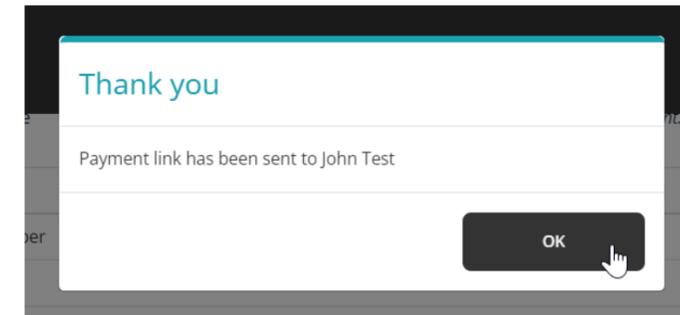
- Selecting 'Pay Later' option will send an email to the customer requesting them to pay for the valuation fee directly

Send payment link to customer?

Note: Any delay in payment will result in a delay in order completion

YES - SEND PAYMENT LINK

NO - BACK TO SUMMARY



- Please note that the email address must be entered into the customer details section of the order summary to ensure this option is successful

Summary of AVM Valuation Request - Order N°: AL5-AACB-9FR

29 GULLIVER STREET, BROOKVALE, NSW - 2100
DIPID: AU13213778 , Legal Description: 24/11209

Instructing Party	
Lender Name	Kevin Remara
Lender Phone	0411111111
Lender Email	kevin.remara@valtest.co.nz
Occupancy Type	Not Applicable
Customer's Contact Details	Name: Testing Email: test@test.com.au Phone: 0400000000
Property Access Details	Contact customer for access
Comments	No additional customer or lender comments
Attached Files*	No files have been provided *More files can be added later if required

RE-ASSIGNING VALUATION FIRM

Reassignment

- Select **“Reassign Firm”** if you wish to change the valuation firm completing your order

ATTACH FILES REASSIGN OWNER REASSIGN FIRM CHANGE ORDER TO DASHBOARD

Comments and Actions

COMMENT CANCEL ORDER

Comment

COMMENT

Charge to Cost Centre: Comment- Test comment
Tuesday 18th April 2023 10:17 by Kevin Remara

- This will take you to a landing page where you can select an alternate valuer from the eligible drop-down list. Once you have made your selection, click **“Update”**. A notification will be sent to both valuation firms and the order will progress with the new valuation firm

Eligible Firm

Opteon property valuations and advisory services

UPDATE BACK TO DETAIL