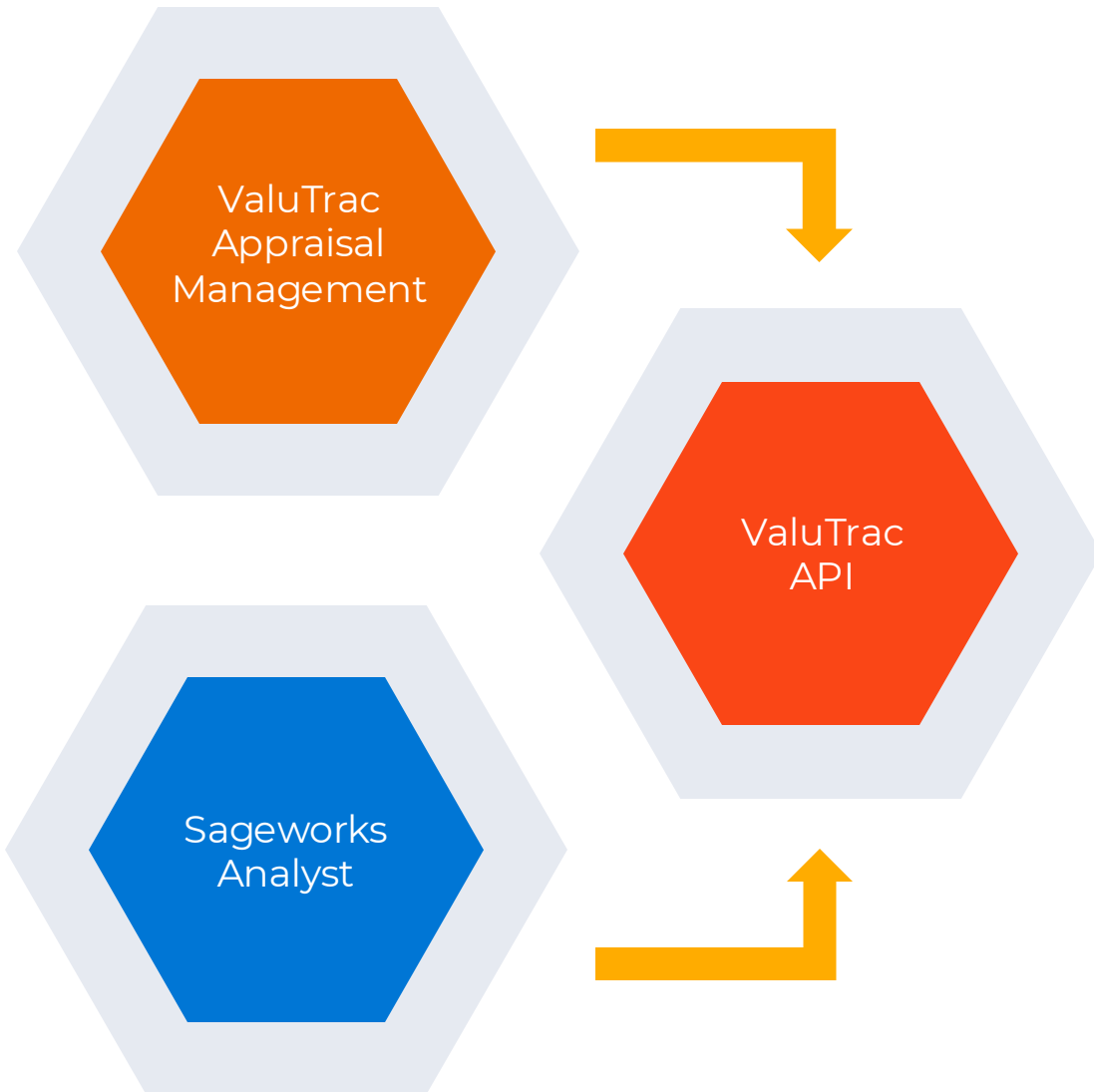




INTEGRATION

www.valutracsoftware.com

SAGEWORKS ANALYST INTEGRATION



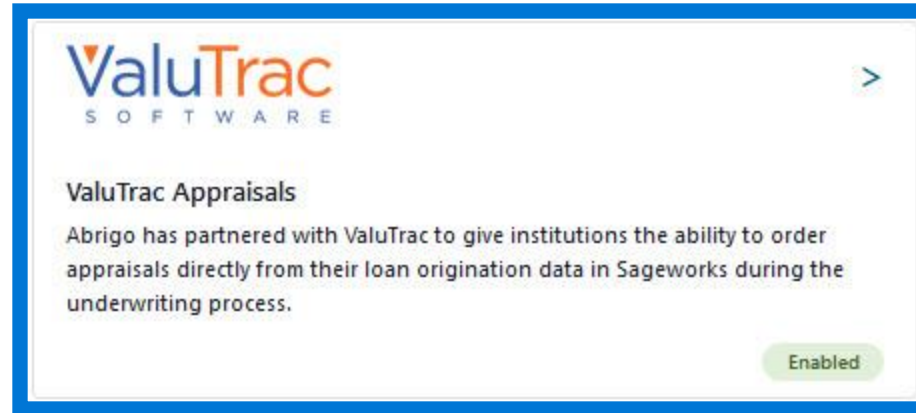
- Order Appraisal from Sageworks Collateral page
- Final Appraisal Reports returned from ValuTrac to Sageworks Collateral Page
- Final Appraisal Reports returned from ValuTrac to Sageworks Document Library attached to loan and collateral
- Add Documentation to an Appraisal Order to provide more intelligence to appraiser
- Chat back and forth between Sageworks and ValuTrac users

IMPLEMENTATION

1. Product licenses required from both Abrigo and ValuTrac
2. ValuTrac issues new API credentials and Platform ID
3. Customer enters the credentials in Third Party Connections
4. Start performing appraisal orders within Sageworks!

VALUTRAC APPRAISALS INTEGRATION WITHIN SAGEWORKS

Turn on integration on the Sageworks 3rd Party Connections page



Enter your API Key and Platform ID provided by ValuTrac.



ValuTrac Appraisals

Status: Enabled

[Enable Integration](#) [Usage Info](#) [Resources](#)

Abrigo's integration with ValuTrac allows you to order appraisals from the Sageworks collateral page and receive appraisal documents in Document Library when complete.

Enabled by Payton Drakos on August 16, 2024 at 10:09 CDT

Enable ValuTrac Appraisals: ☐

API Key:

Platform ID:

[Save](#)

VALUTRAC APPRAISALS INTEGRATION WITHIN SAGEWORKS

Connections

[Flood Determination](#)
[Order Flood Determination](#)

[Vehicle Valuation](#)
[Order Vehicle Valuation](#)

[UCC Filing](#)
[Relate Collateral to UCC Filing](#)

[Appraisal](#)
[Order Appraisal](#)

Liens Against the Selected Collateral

[Bulk Apply Liens](#)

	Loan Number	Lien Holder	Lien Position	Applicable Collateral Value	Unsecured Liens	Loan Balance / Lien Amount	Comments
X	SBA Test 1 2021.01.15	ValutracPartnerAccount	1	\$ 10,000	\$ 0.00	\$ 1	

[+ Add New Lien](#)

[Why isn't my loan in the loan number dropdown?](#)

Collateral LTV: 101%

Excess (Shortfall) in Collateral: \$9,999

From the Sagesworks collateral page, click "Appraisal" to launch the appraisal order.

Make selections in the pop-up and click "Order Appraisal" to send to ValuTrac.

Order Appraisal

Select Lien:

Collateral Description*: COLLATERAL

Lien*:

Borrower*:

Property Contact*:

Property Contact Note:

Order Information

Order Type*:

Loan Type*: Select Order Type

Branch*:

Product*:

Purpose*:

Property Type*:

Occupancy Type*:

Payment Type*:

Rush*: ☐ Yes ☐ No

Due Date*:

Loan Officer Email:

Loan Processor Email:

Assistant 1 Email:

Assistant 2 Email:

[Order Appraisal](#) [Cancel](#)

VALUTRAC APPRAISALS INTEGRATION WITHIN SAGEWORKS

Appraisal

PENDING PAYMENT

Add supporting documentation
Download latest Appraisal Report

Appraisal ordered by Connor Heinrich on 2022-06-10T16:30:25-0802106-04:00.

[Order New Appraisal](#) [ValuTrac Chat](#)

Add Documentation to Appraisal Order

Documents:

[Add Documentation to Appraisal Order](#) [Cancel](#)

Add Documentation to an appraisal order so that appraisers have more intelligence

Receive Documentation back from ValuTrac related back to the collateral and customer record within Sageworks

Collateral

[Customer List](#)

Related Customers Related Documents 9

Current Scenario Proposed Scenario

Collateral: [Delete](#) [Add New](#)

1 Documents Related to ValuTracCollateral

VALUTRAC APPRAISALS INTEGRATION WITHIN SAGEWORKS

Receive status updates about the appraisal on the collateral page and via email alerts

Appraisal

PENDING PAYMENT

Add supporting documentation

Download latest Appraisal Report

Appraisal ordered by Connor Heinrich on 2022-06-10T16:30:25.0802106-04:00.

Order New Appraisal

ValuTrac Chat

ValuTrac Appraisal Chat

Refresh Messages

Connor Heinrich

Just ordered an appraisal!

6/10/2022, 4:54:30 PM

appraiser_user

received!

6/10/2022, 7:54:30 PM

Send

Cancel

New Message... 0 / 700

Chat back and forth between Sageworks and ValuTrac users