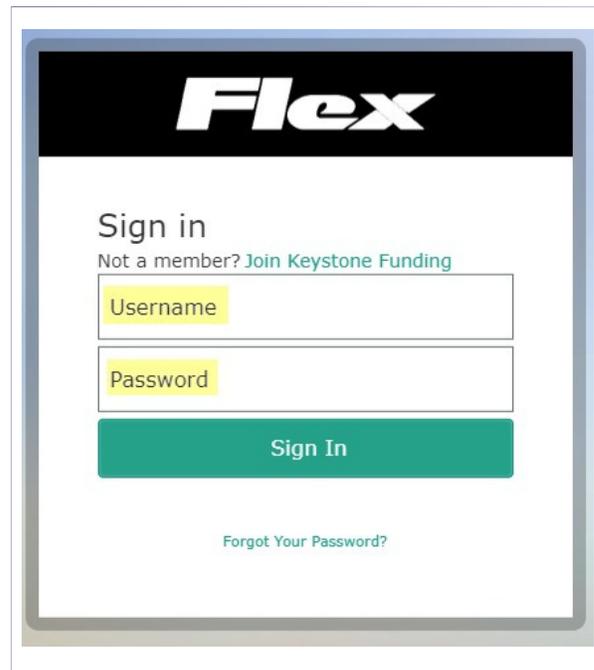
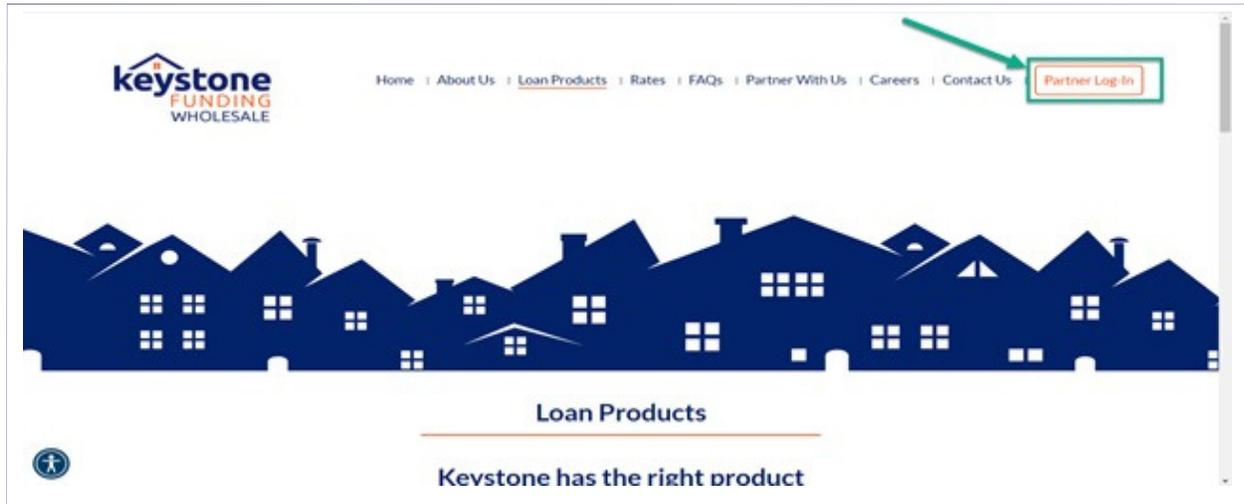


## Step 1

Go to [keystonebroker.com](http://keystonebroker.com) and click on “Partner Log-In” as seen below.  
You will then be directed to our broker portal (Flex) to login using your own unique credentials.



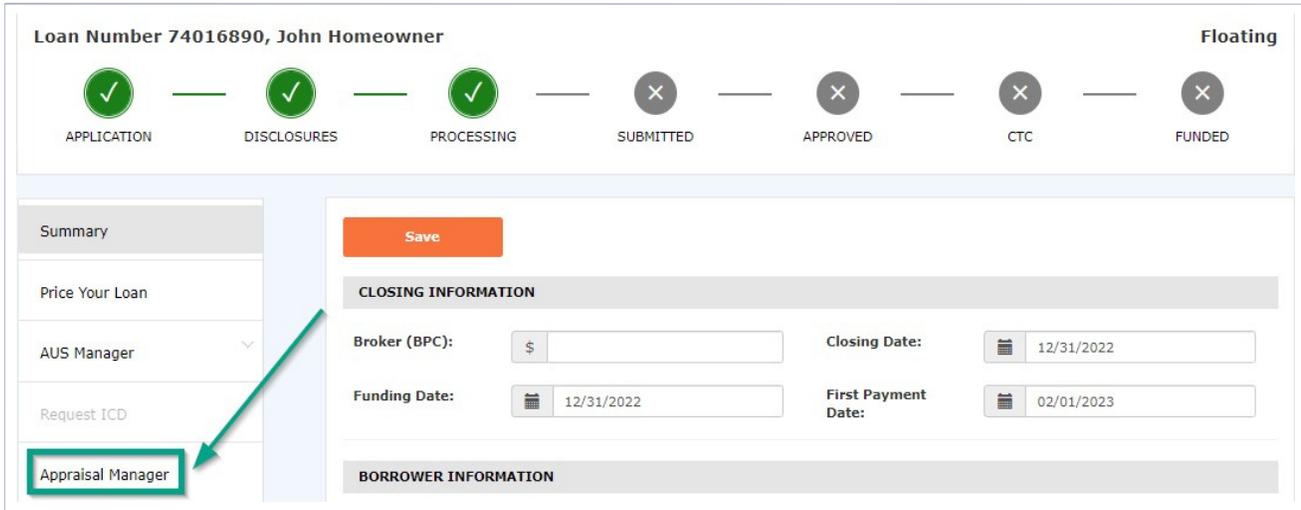
The screenshot shows the Flex login portal. At the top, the 'Flex' logo is displayed in white on a black background. Below the logo, the text 'Sign in' is followed by a link: 'Not a member? [Join Keystone Funding](#)'. There are two input fields: 'Username' and 'Password', both highlighted with a yellow background. Below the input fields is a green 'Sign In' button. At the bottom of the form, there is a link: 'Forgot Your Password?'.

**Questions?**

[portalsupport@keystonefunding.com](mailto:portalsupport@keystonefunding.com)

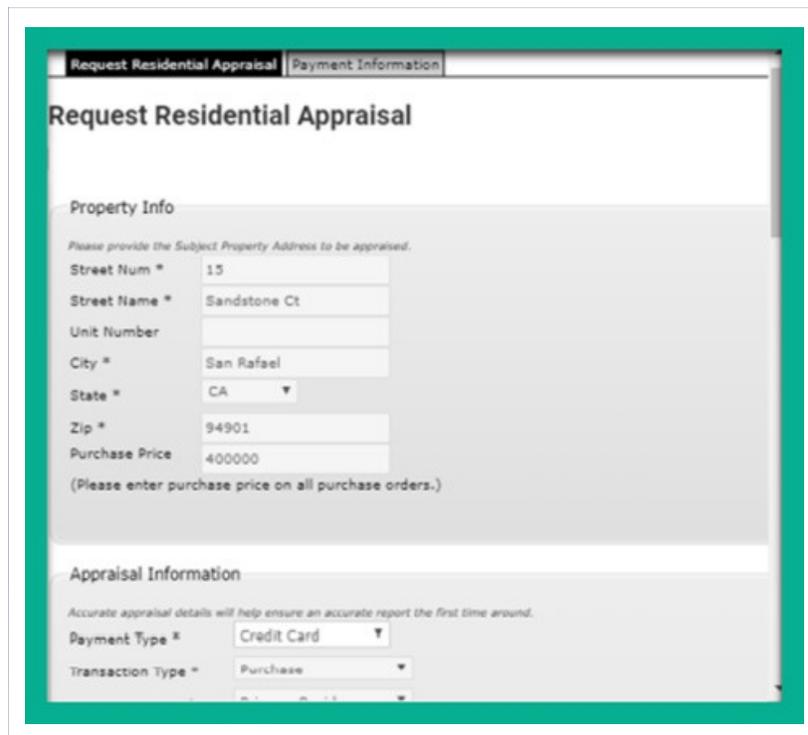
## Step 2:

Once Disclosures / Intent to Proceed have been eSigned by the borrower(s) the **APPRAISAL MANAGER** tab will become available as shown below.



The screenshot displays a loan management interface for Loan Number 74016890, John Homeowner. At the top, a progress bar shows the status of various stages: APPLICATION (checked), DISCLOSURES (checked), PROCESSING (checked), SUBMITTED (unchecked), APPROVED (unchecked), CTC (unchecked), and FUNDED (unchecked). The word "Floating" is visible in the top right corner. On the left side, a navigation menu includes "Summary", "Price Your Loan", "AUS Manager", "Request ICD", and "Appraisal Manager", with the latter highlighted by a green box and an arrow. The main content area features a "Save" button and sections for "CLOSING INFORMATION" and "BORROWER INFORMATION". The "CLOSING INFORMATION" section includes fields for Broker (BPC), Closing Date (12/31/2022), Funding Date (12/31/2022), and First Payment Date (02/01/2023).

Click on the "**APPRAISAL MANAGER**" tab from the loan page to request your Residential Appraisal Information from the loan file will pre-populate into the Order Form as shown below. Verify the information is correct, then proceed to select your Product, Preferred AMC and Payment Information.



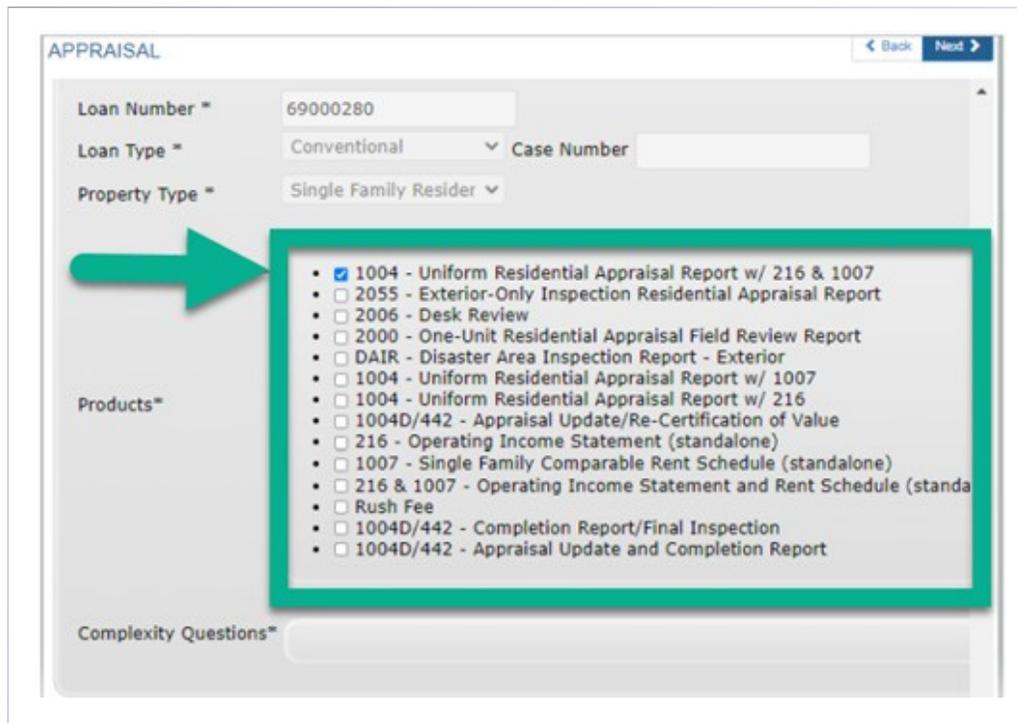
The screenshot shows the "Request Residential Appraisal" form. It is divided into two main sections: "Property Info" and "Appraisal Information". The "Property Info" section includes fields for Street Num (15), Street Name (Sandstone Ct), Unit Number, City (San Rafael), State (CA), Zip (94901), and Purchase Price (400000). A note below these fields states: "(Please enter purchase price on all purchase orders.)". The "Appraisal Information" section includes fields for Payment Type (Credit Card) and Transaction Type (Purchase). A note above these fields states: "Accurate appraisal details will help ensure an accurate report the first time around."

**Questions?**

[portalsupport@keystonefunding.com](mailto:portalsupport@keystonefunding.com)

### Step 3:

Scroll down on the Order Form and select the appropriate Appraisal Product Code.



The screenshot shows a web form titled "APPRAISAL" with a "Back" button and a "Next" button. The form contains the following fields:

- Loan Number \*: 69000280
- Loan Type \*: Conventional (dropdown) Case Number: [empty]
- Property Type \*: Single Family Resider (dropdown)
- Products\*: A list of product codes with checkboxes. The first item, "1004 - Uniform Residential Appraisal Report w/ 216 & 1007", is selected with a checked checkbox. A green arrow points to this list.
- Complexity Questions\*: [empty]

The list of products includes:

- 1004 - Uniform Residential Appraisal Report w/ 216 & 1007
- 2055 - Exterior-Only Inspection Residential Appraisal Report
- 2006 - Desk Review
- 2000 - One-Unit Residential Appraisal Field Review Report
- DAIR - Disaster Area Inspection Report - Exterior
- 1004 - Uniform Residential Appraisal Report w/ 1007
- 1004 - Uniform Residential Appraisal Report w/ 216
- 1004D/442 - Appraisal Update/Re-Certification of Value
- 216 - Operating Income Statement (standalone)
- 1007 - Single Family Comparable Rent Schedule (standalone)
- 216 & 1007 - Operating Income Statement and Rent Schedule (standalone)
- Rush Fee
- 1004D/442 - Completion Report/Final Inspection
- 1004D/442 - Appraisal Update and Completion Report

Select Desired AMC from the Approved AMC List:

-Karis Management Group

-Nationwide Property and Appraisal Services

- Class Valuation

- Nationwide Appraisal Network

-Appraisal Nation, LLC

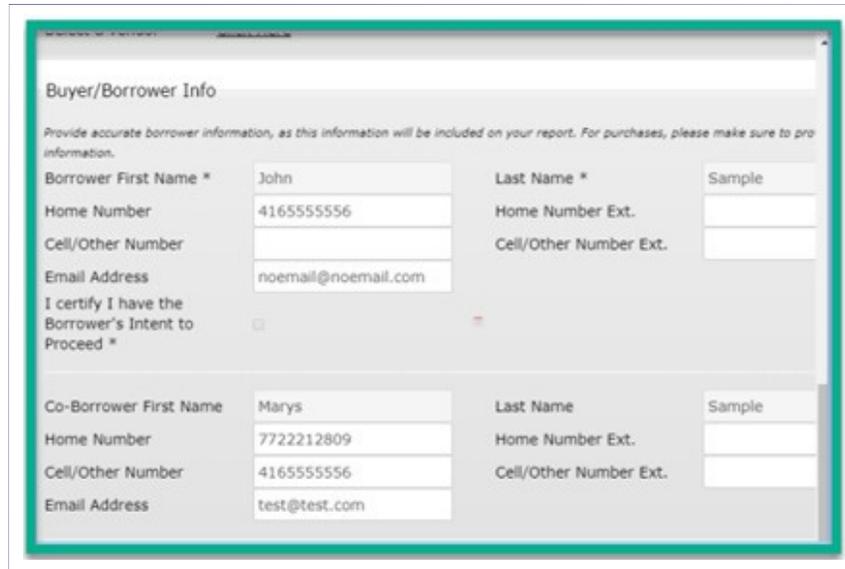
-Appraisal Links

**Questions?**

**portalsupport@keystonefunding.com**

## Step 4:

### Update Borrower's Information



Buyer/Borrower Info

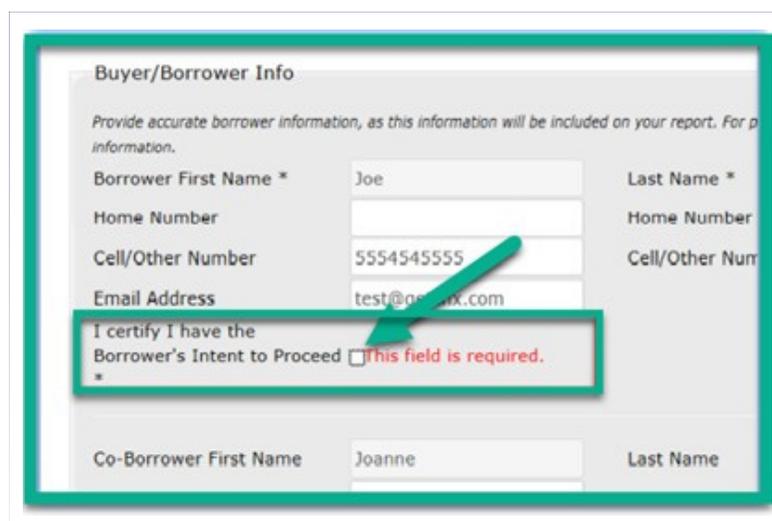
Provide accurate borrower information, as this information will be included on your report. For purchases, please make sure to provide accurate information.

Borrower First Name *	John	Last Name *	Sample
Home Number	4165555556	Home Number Ext.	
Cell/Other Number		Cell/Other Number Ext.	
Email Address	noemail@noemail.com		
I certify I have the Borrower's Intent to Proceed *			
Co-Borrower First Name	Marys	Last Name	Sample
Home Number	7722212809	Home Number Ext.	
Cell/Other Number	4165555556	Cell/Other Number Ext.	
Email Address	test@test.com		

Borrower's information will pre-populate from the loan file. If there are any changes required, you can update it prior to submitting your appraisal for a quote. Only certain fields are editable. Mandatory fields must be filled in.

## Step 5:

Confirm eSigned "Intent to Proceed" has been received.



Buyer/Borrower Info

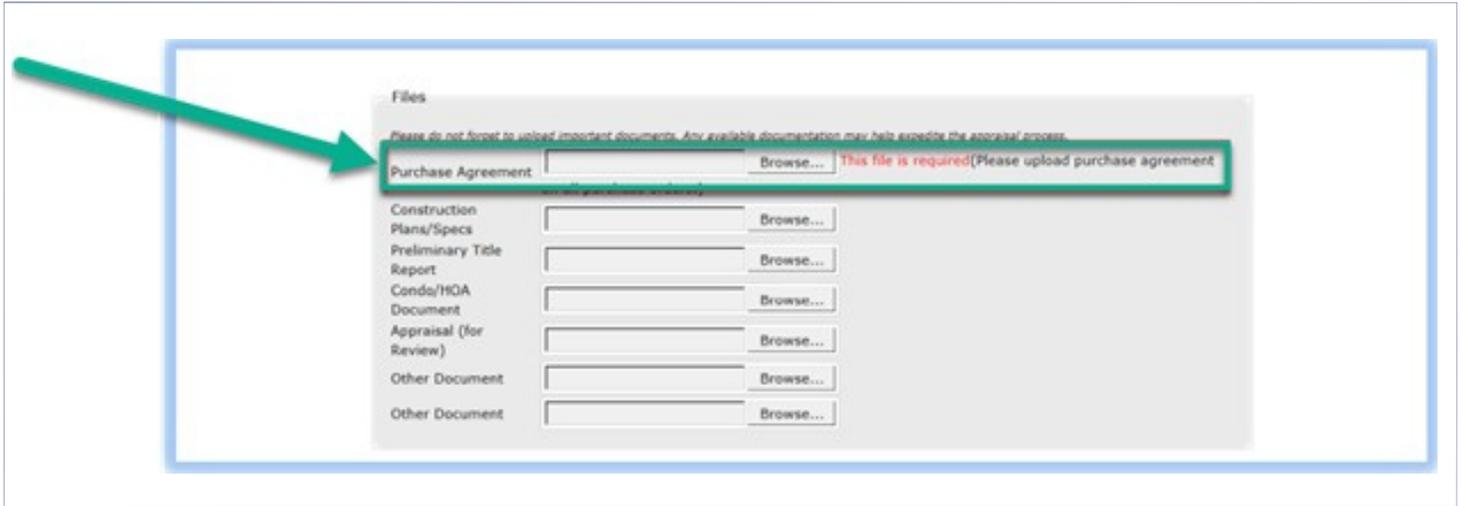
Provide accurate borrower information, as this information will be included on your report. For purchases, please make sure to provide accurate information.

Borrower First Name *	Joe	Last Name *	
Home Number		Home Number	
Cell/Other Number	5554545555	Cell/Other Number	
Email Address	test@ge.com		
I certify I have the Borrower's Intent to Proceed *			
<input type="checkbox"/> This field is required.			
Co-Borrower First Name	Joanne	Last Name	

The Intent to Proceed checkbox must be selected otherwise you will not be able to move forward with the appraisal order.

## Step 6:

Upload Purchase Agreement. Click on "Browse" to upload.



The screenshot shows a 'Files' section with a list of document types and their corresponding upload buttons. A green arrow points to the 'Purchase Agreement' row. A red box highlights the 'Purchase Agreement' field, which contains a red error message: 'This file is required (Please upload purchase agreement)'. Below the error message, the text '(or all purchase orders)' is visible. The other document types listed are Construction Plans/Specs, Preliminary Title Report, Condo/HQA Document, Appraisal (for Review), and two Other Document entries, each with a 'Browse...' button.

File Type	Upload Button	Notes
Purchase Agreement	Browse...	This file is required (Please upload purchase agreement) (or all purchase orders)
Construction Plans/Specs	Browse...	
Preliminary Title Report	Browse...	
Condo/HQA Document	Browse...	
Appraisal (for Review)	Browse...	
Other Document	Browse...	
Other Document	Browse...	

For all "Purchase" orders please ensure that a Purchase Agreement has been uploaded here otherwise you will not be able to proceed with your order.

**Questions?**

[portalsupport@keystonefunding.com](mailto:portalsupport@keystonefunding.com)

## Step 7:

Click on the "REQUEST APPRAISAL" button as shown below.



Once you click on the "Request Appraisal" button at the bottom of the Order Screen, a Connexions order # will display and the order will be assigned to the AMC.

If you do not enter a credit card for the borrower, then the assigned AMC will be responsible for sending out the "Payment Link" to your Borrower and will proceed once payment has been received.

## AMC Contact / Support List

### Karis Management Group

Dan Holtzman- Director of Operations

Direct Line: 704-390-5225

Email: [dan@karismgmt.com](mailto:dan@karismgmt.com)

Katie Britton - Sales Support

Direct Line: 254-433-8505

Email: [katie.britton@karismgmt.com](mailto:katie.britton@karismgmt.com)

### Nationwide Appraisal Network (NAN)

Sara Stillman - Client Services Manager

Direct Line: 888-760-8899 Ext. 223

Email: [sstillman@nan-amc.com](mailto:sstillman@nan-amc.com)

Katelyn Workman - Customer Service Manager

Direct Line: 888-760-8899 Ext. 286

Email: [kworkman@nan-amc.com](mailto:kworkman@nan-amc.com)

### Appraisal Nation, LLC

Kevin Pettaway - Chief Development Officer

Direct Line: 303-870-2538

Email: [kpettaway@appraisalnation.com](mailto:kpettaway@appraisalnation.com)

### Class Valuation

Matthew Albino - National Sales Manager

Direct Line: 716-523-9675

Email: [malbino@classvaluation.com](mailto:malbino@classvaluation.com)

### Nationwide Property & Appraisal Services

Chrissy Warren - Inside Account Manager

Direct Line: 888-877-6533 Ext. 119

Email: [cwarren@oldecitylending.com](mailto:cwarren@oldecitylending.com)

### Appraisal Links

Karrie Maurice- Branch Owner/Manager

Direct Line: 732-696-2905 ext 904

Email: [kmaurice@appraisallinks-amc.com](mailto:kmaurice@appraisallinks-amc.com)

### Beth Burns

Direct Line: 732-696-2905 ext 909

Email: [bburns@appraisallinks-amc.com](mailto:bburns@appraisallinks-amc.com)