



Client User Roles

MountainSeed's Appraisal Management system includes several Client User Types, each of which has its own set of permissions within the system. This table shows each user type and outlines the rights available to the user.

Rights	Company Manager	Processor Manager	EVP/VP/President	Loan Processor	Employee	Loan Officer
Orders they can see/access	ALL ORDERS For branches they are listed on (does NOT have to be listed on the order to be able to view it)	ALL ORDERS For branches they are listed on (does NOT have to be listed on the order to be able to view it)	ALL ORDERS For branches they are listed on	ONLY For orders they are listed on	ONLY For orders they are listed on	ONLY For orders they are listed on
Place orders	YES	YES	NO	YES	NO	YES
Choose Bids	YES	YES	NO	YES	NO	NO
Can see Appraiser Names for bids	YES**	NO	NO	NO	NO	NO
Send messages	YES	YES	YES	YES	YES	YES
Download completed appraisal documents	YES	YES	YES	YES	YES	YES
Modify User Email Notifications	YES (for themselves and other users within the same branch/profile)	YES (for themselves and other users within the same branch/profile)	YES (for themselves and other users within the same branch/profile)	NO	NO	NO
View and Download Company Reports?	YES (for branch/profile they are listed on)	YES (for branch/profile they are listed on)	YES (for branch/profile they are listed on)	NO	NO	NO
Location user's name shows in order form	All Bank Employee Dropdowns	All Bank Employee Dropdowns	NONE; view only access	All Bank Employee Dropdowns	All Bank Employee Dropdowns	All Bank Employee Dropdowns

** Please note that MountainSeed recommends that the ability to view the identity of the appraiser and appraisal firm be limited to those bank employees that are sufficiently independent of loan production staff, as set forth in applicable regulation. Please make sure that if you choose the "Company Manager" User Type that the employee with this User Type is sufficiently independent.