Portal Quick Start Guide

How to easily order Clear Capital's products using the Portal

The Portal is a one-stop-shop for all of Clear Capital's unmatched property data analytics products and valuation services. Sign up to immediately begin ordering our proprietary products.

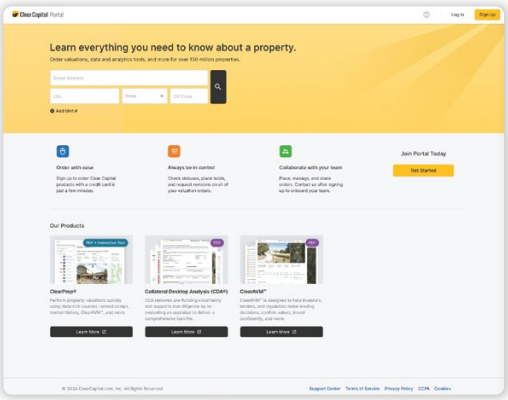
This guide helps new users understand how to:

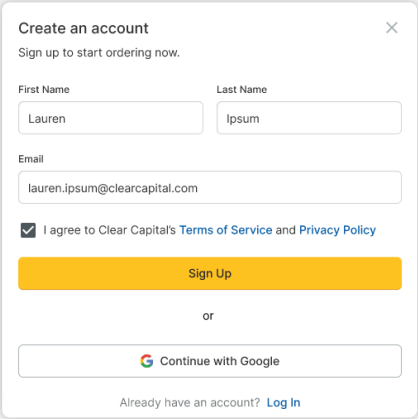
- Create a user account
- Add users
- Order products
- Manage your orders
- Use ClearProp®
- Use ClearAVM™
- View your orders
- Receive help

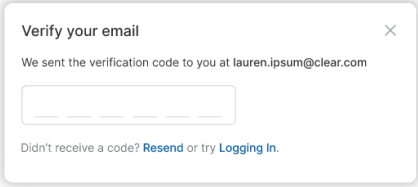
Create a User Account

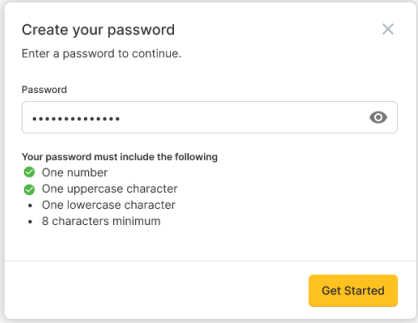
1. To create a user account, simply click the **"Sign Up"** or **"Get Started"** buttons on **portal.clearcapital.com**.

2. Enter your name and email address, validate your email with the six-digit code sent to your email address, and set your password.









Add users

1 You can add users to your Portal account to place, manage, and share orders with your team members.

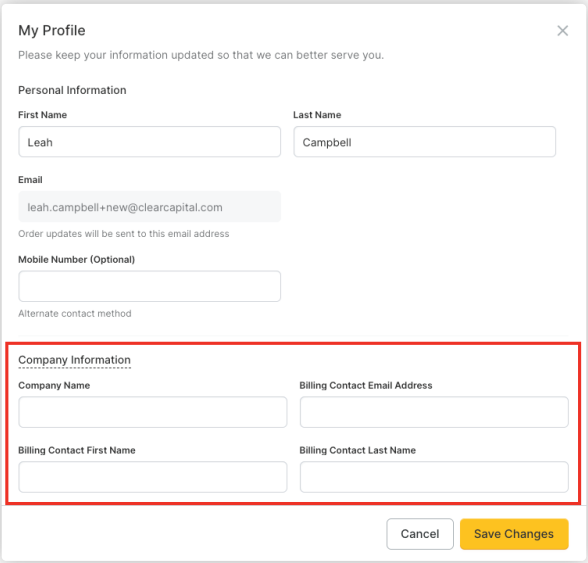
2 First, make sure you have established your company account by going to your Profile and filling out the following fields:

A. Company Name

B. Billing Contact Email Address

C. Billing Contact First Name

D. Billing Contact Last Name



3 Click **"Save Changes."**

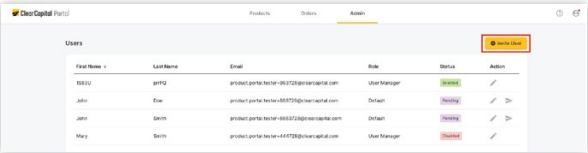
4 Navigate to the **"Admin"** tab to add and manage users.

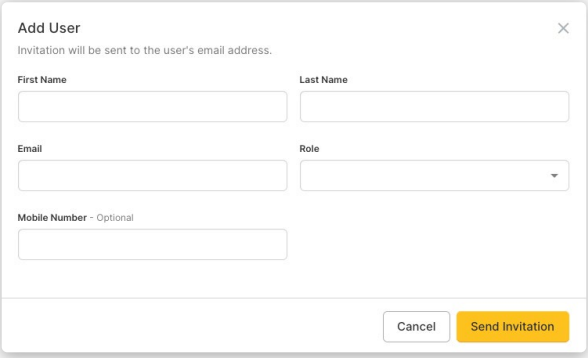
5 To add a user, click the **"Invite User"** button and fill out the form.

A. There are two roles to choose from:

I. **User Manager —** This role gives a user the ability to access the "Admin" tab, add/manage users, and place and share orders in the Portal.

II. **Default —** This role gives a user the ability to place and share orders in the Portal.



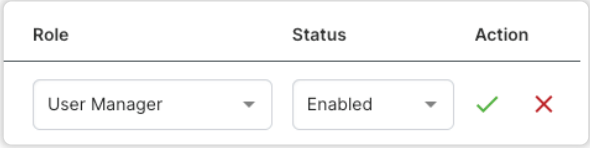


6 An invitation email will be sent to the user. They will be able to follow the link within their invitation email to set up their password.

Add users (continued)

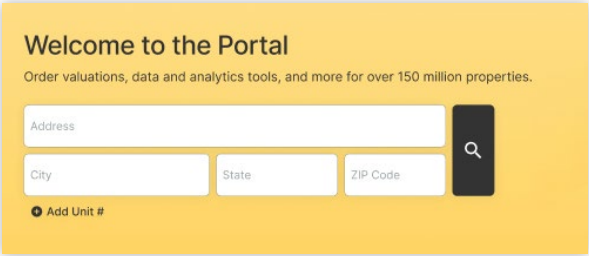
7 To resend an invitation, click the arrow icon under the Action column for that user.

8 To edit a user, click the pencil icon under the Action column for that user. You can edit their role as well as disable/enable the user. Click the checkmark to save your changes or the X to cancel.

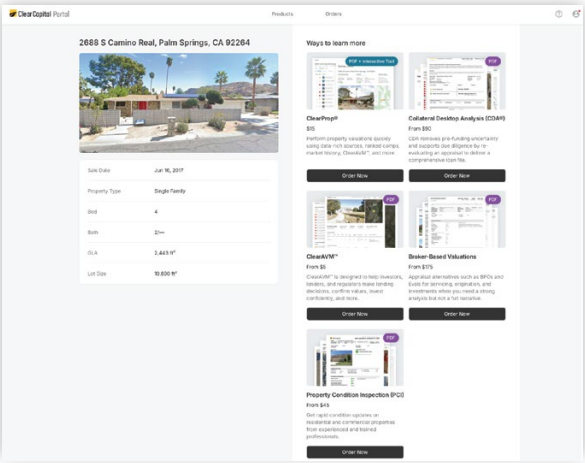


Order Products

1 Enter a property address into the address search field to view property details and the products available to order.

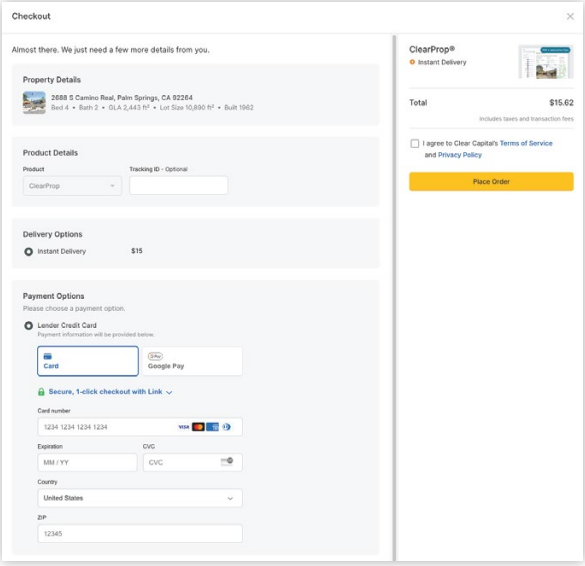


2 Next to the property details, you will see a list of available products for the property. Click the "**Order Now**" button to be taken to the order form to complete your purchase.



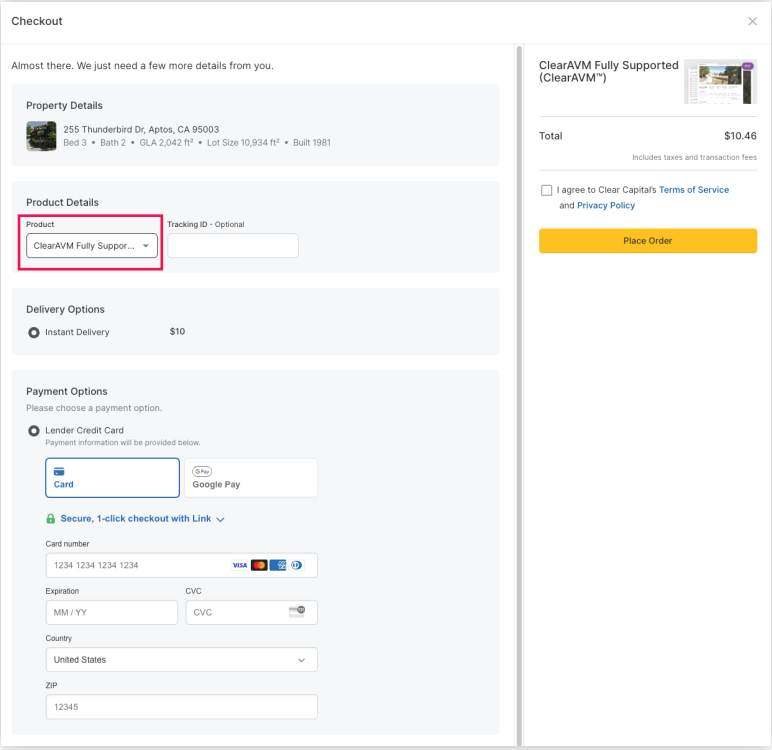
Order ClearProp

- Add or review your payment method.
- Review the Terms of Service and Privacy Policy and check the checkbox.
- Add a Tracking ID if needed.
- Click "**Place Order.**"
- You will be taken to your ClearProp order where you can interact with the tool or download as a PDF.



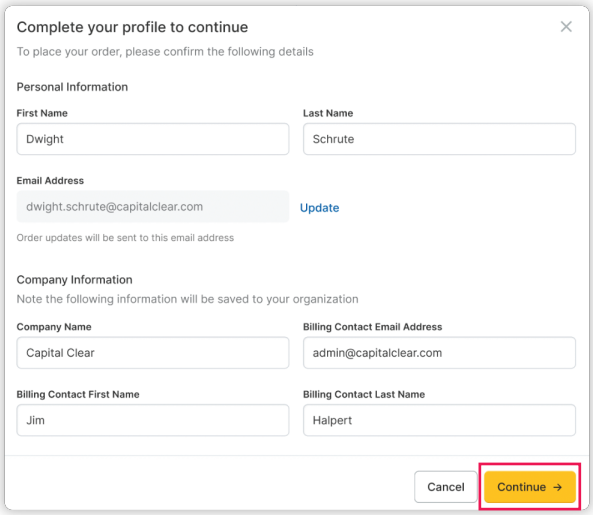
Order ClearAVM

1. Select a ClearAVM product.
   - **A. Value Only** provides the value and value range, confidence score, and FSD.
   - **B. Fully Supported** provides the value and value range, confidence score, FSD, comparables, and property characteristics.
2. Add or review your payment method.
3. Review the Terms of Service and Privacy Policy and check the checkbox.
4. Add a Tracking ID if needed.
5. Click **"Place Order."**



Order CDA

1 Fill out all the fields in the profile form and then click "**Continue**" to advance to your order details.



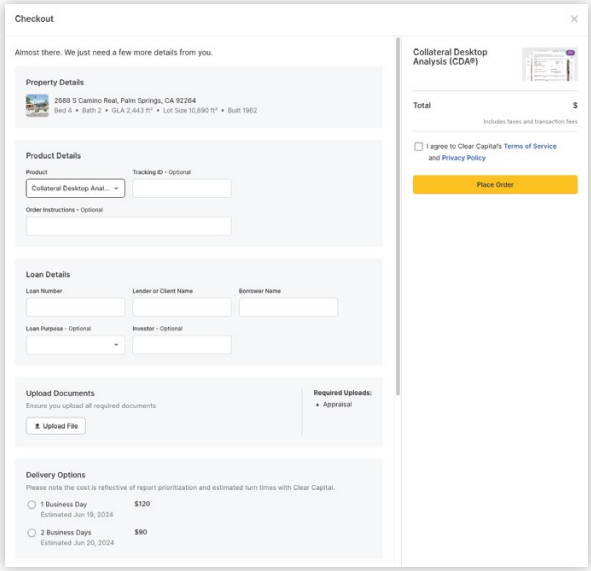
2 Select a CDA product.

A. Collateral Desktop Analysis
B. Collateral Desktop Analysis + MLS Sheets

3 Fill out all the fields in the CDA order form with information pertaining to the loan.

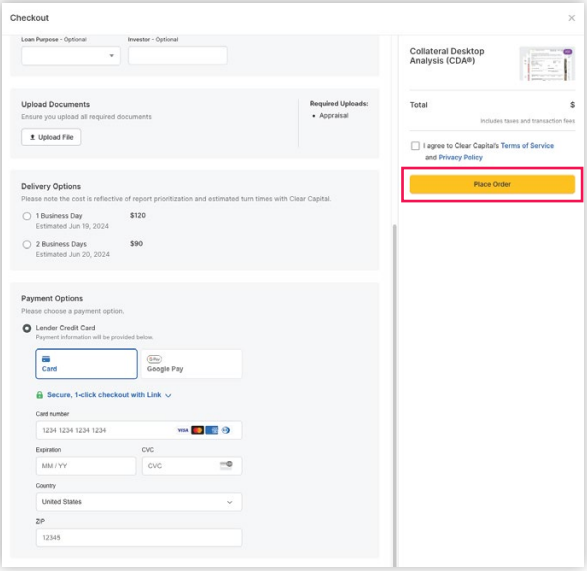
4 Upload your appraisal.

5 Select your delivery time.

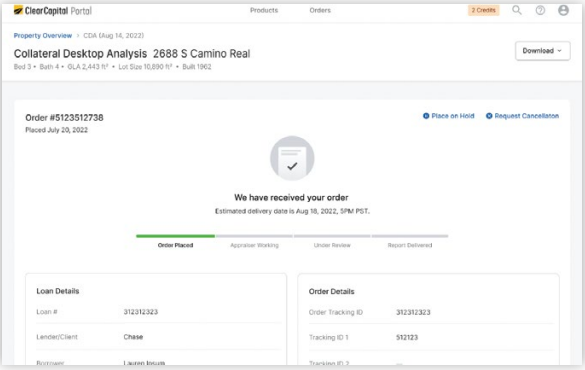


Order CDA (continued)

6 Once you are satisfied with your order preferences, click **"Place Order."** You will be taken to your order page, where you can track the status of your order, place your order on hold, or request cancellation.

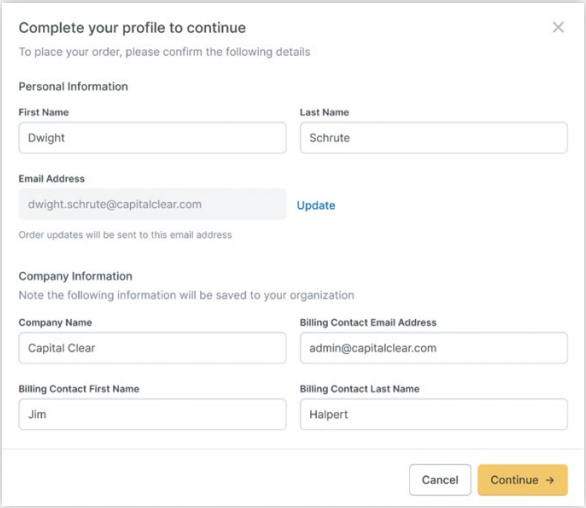


As we process your order, you can view the progress on the order page in the Portal. You will be notified by email if we have a question about your order, if the order gets canceled, and when your order is delivered.



Order Broker Price Opinion or Evaluation

1 Fill out all the fields in the profile form and then click "**Continue**" to advance to your order details.



2 Select a Broker Price Opinion or Evaluation:

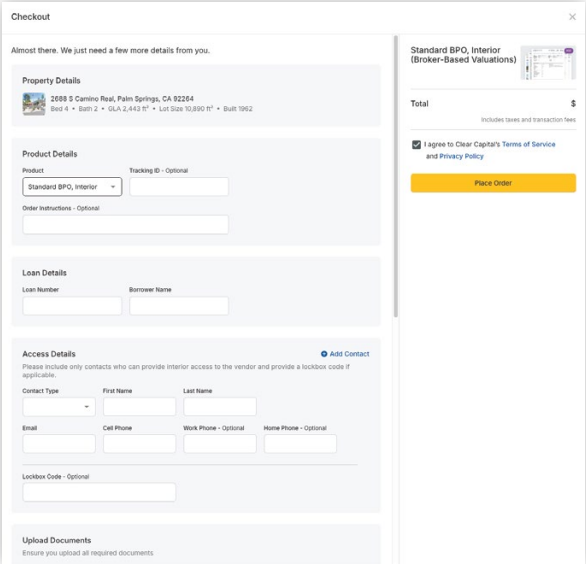
A. Broker Price Opinion - Drive-by
B. Broker Price Opinion - Interior
C. Evaluation - Drive-by
D. Evaluation - Interior

3 Fill out all the fields in the order form with information pertaining to the loan.

4 Add access details if applicable.

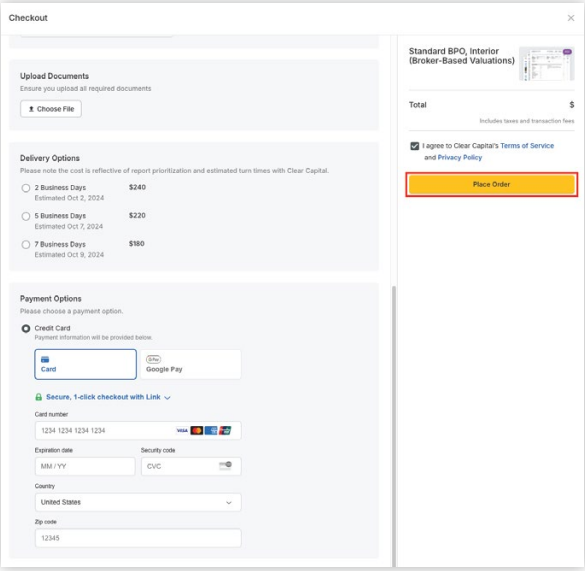
5 Upload any supplemental documents.

6 Select your delivery time.



Order Broker Price Opinion or Evaluation (continued)

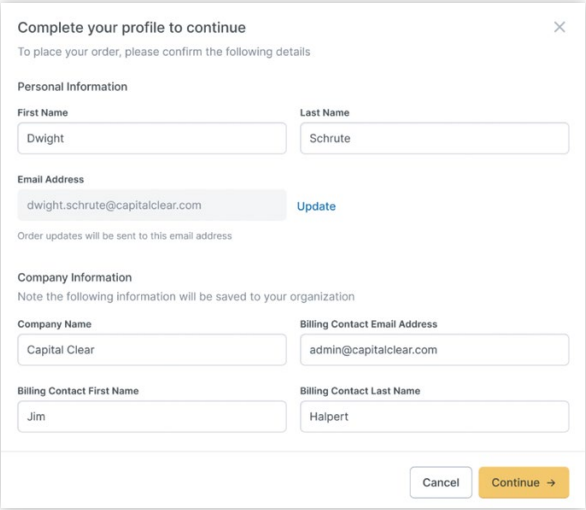
7 Once you are satisfied with your order preferences, click "**Place Order**." You will be taken to your order page, where you can track the status of your order, place your order on hold, or request cancellation.



As we process your order, you can view the progress on the order page in the Portal. You will be notified by email if we have a question about your order, if the order gets canceled, and when your order is delivered.

Order a Property Inspection

1 Fill out all the fields in the profile form and then click "**Continue**" to advance to your order details.



2 Select a Property Inspection product:

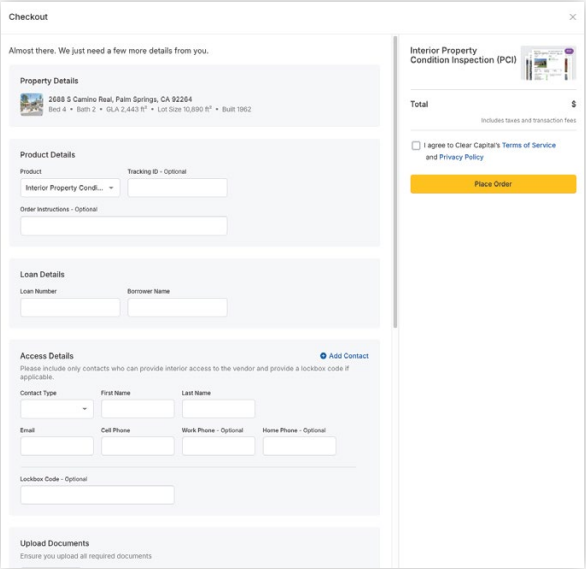
A. Exterior Property Condition Inspection
B. Interior Property Condition Inspection
C. Post Disaster Inspection

3 Fill out all the fields in the order form with information pertaining to the loan.

4 Add access details if applicable.

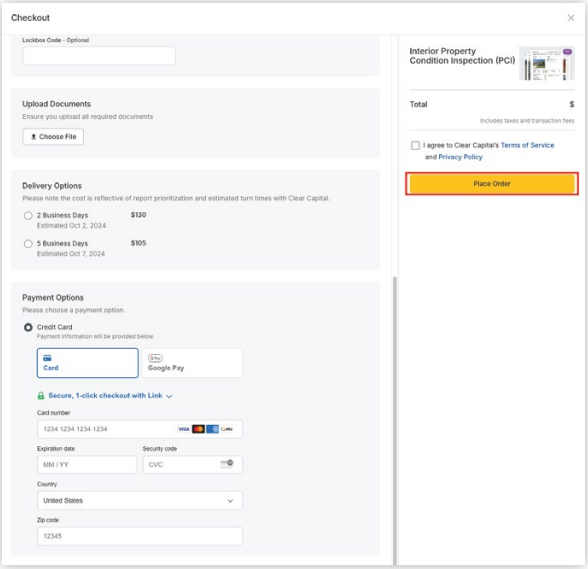
5 Upload any supplemental documents.

6 Select your delivery time.



Order a Property Inspection (continued)

7 Once you are satisfied with your order preferences, click "**Place Order**." You will be taken to your order page, where you can track the status of your order, place your order on hold, or request cancellation.



As we process your order, you can view the progress on the order page in the Portal. You will be notified by email if we have a question about your order, if the order gets canceled, and when your order is delivered.

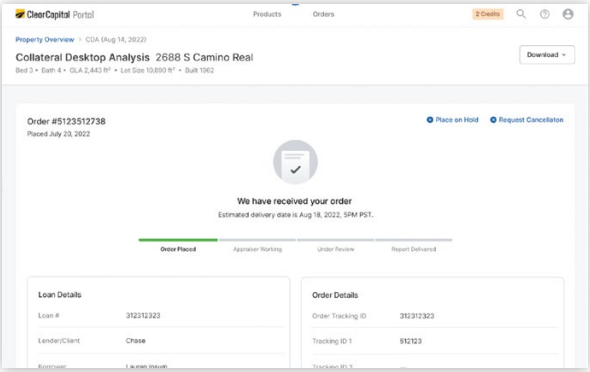
Manage your orders

Keep track of and manage your CDA, Broker Price Opinions, Evaluations, and Property Inspection orders through the Portal. We provide an easy-to-use interface and tools to help you fully control your order.

Order Status Page

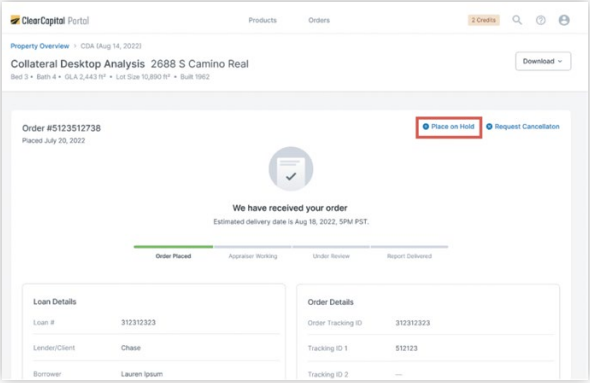
This page contains the information you need to both track and manage your order.

- Easily keep track of your order's progress
- View your loan and order details
- Place your order on hold
- Request a cancellation
- Upload documents
- Add contacts
- Send a message
- Receive your order
- Request a revision



Placing an Order on Hold

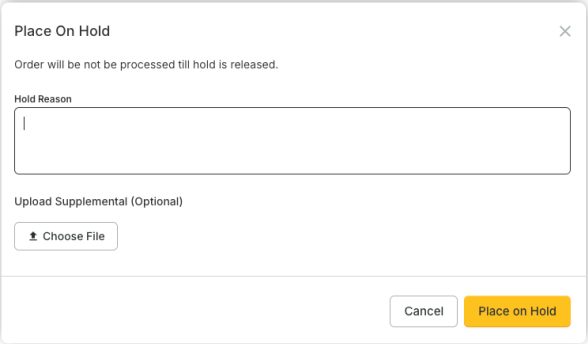
If you need to place your order on hold, simply click the "**Place on Hold**" button and enter a comment explaining why you'd like the order to be placed on hold.



Manage your orders (continued)

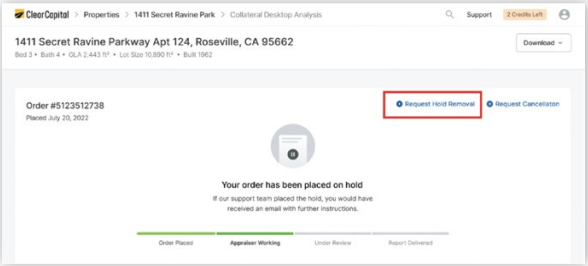
You can also upload a document, like a replacement appraisal, to send along with your hold request.

Once your order has been placed on hold, our team will process the request. If there are any changes we need to make to the order, we will do so and take the order off hold. If not, the order will remain on hold until you request its removal.



Removing a Hold on an Order

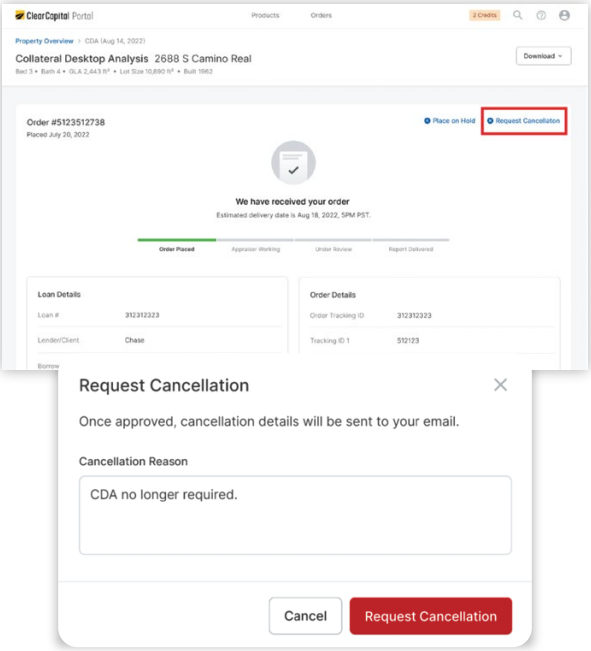
When your order is placed on hold, you can request that the hold be removed. Simply click the "**Request Hold Removal**" button. Our team will receive your request and remove the hold.



Request Cancellation

If you need to cancel an order for any reason, simply click the "**Request Cancellation**" button.

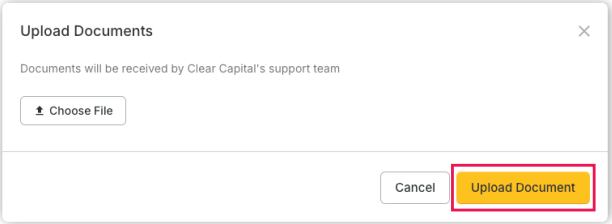
You will be prompted to supply a reason for cancellation before you submit your request. Our team will receive and review your request before canceling the order. You will receive an email confirming the cancellation of your order as well as a separate email with any applicable refund information.



Manage your orders (continued)

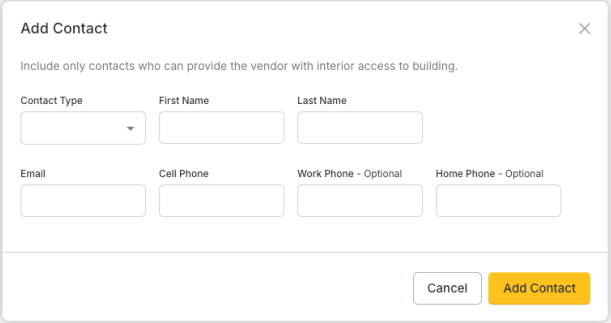
Upload documents

If you need to send our team documents affiliated with your order, just click on the "**Upload Document**" button, upload as many documents as you need, and click "**Upload Documents**."



Add contacts

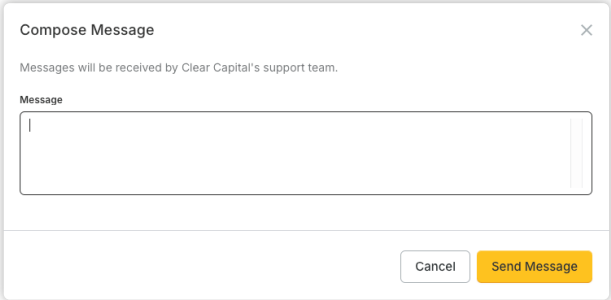
For products that require access details, you can view those details and add additional contacts by clicking the "**Access Details**" tab. Add the contact type, first and last name, an email address, and phone number.



Manage your orders (continued)

Send a message

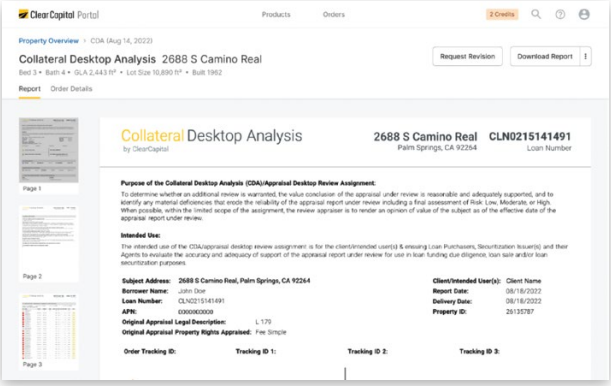
You can view all messages received on your order from our Clear Capital team as well as any messages you send from the Portal affiliated with that order. You can also compose a message to communicate easily with our team on your order. Simply click the "**Compose Message**" button to craft a message and send it.



You will also receive an email when we send you messages pertaining to your order. Messages with a red bell next to it indicate an urgent message.

Receive your order

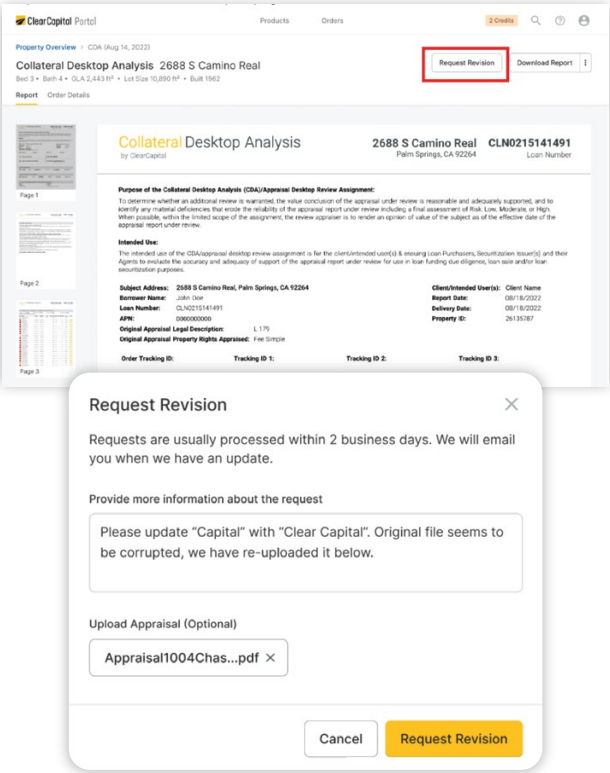
After your order has been delivered, you will receive an email notification with a link to the order. From there, you can view the order within the Portal and download the report in PDF format.



Manage your orders (continued)

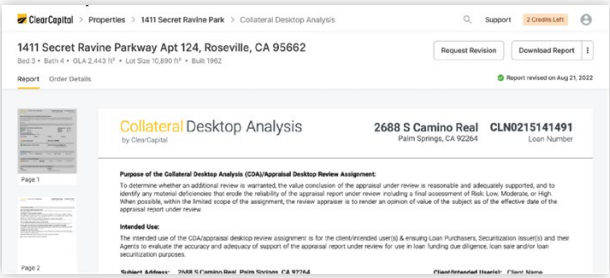
Request Revision

If there are any issues with your order and you'd like to request a revision, simply click the "**Request Revision**" button on the report page.



You will be prompted to provide a comment explaining the need for revision. You will also have the ability to upload a document to send along with the request.

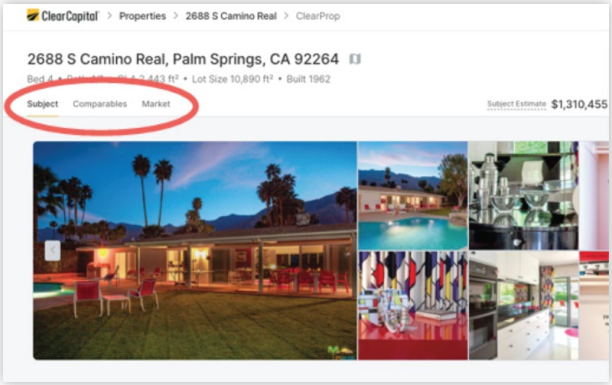
Our team will receive the request and if applicable, we will send it out to be revised. Once the revised report is ready, we will notify you via email notification and show the updated report in the Portal for you to review and download.



How to use ClearProp

Learn about the property and market.

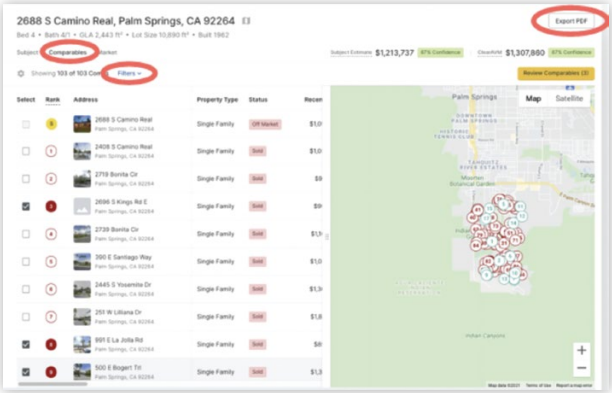
After the interactive report loads, explore the "**Subject**" tab. Select the "**Market**" tab to learn about the market and subject history.



Estimate a property value and save it to PDF

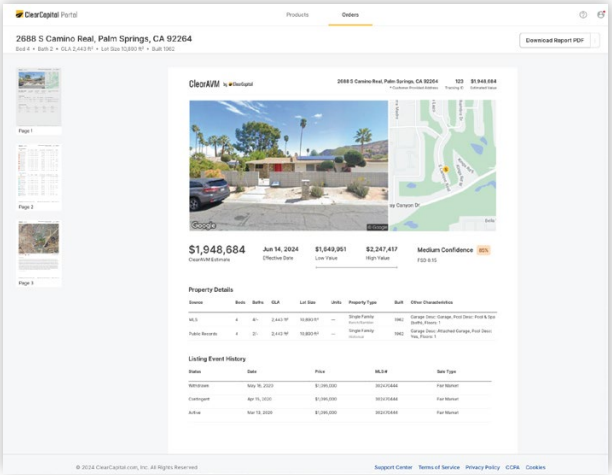
1. Select the "**Comparables**" tab to identify similar properties.
   A. Use "**Filters**" to refine your comparable results.
   B. Select the checkbox next to the comparable(s) to use to estimate the property value.

2. As you select comps, the estimated value is calculated instantly. When finished selecting comparables, "**Export to PDF**" in the upper right corner.



How to use ClearAVM

ClearAVM provides plenty of data that can help you make a lending decision, confirm a value, invest confidently, and so much more. When you access your ordered ClearAVM through the Portal, you will find the following information:



Address

The address at the top of the report is the Customer Provided Address input in our system. The address is then verified, standardized, and gets listed at the bottom of the PDF as the “System Address.” Due to the standardization process, these two addresses may vary.

ClearAVM Estimated Value

ClearAVM's sophisticated machine learning model only produces a value when we’re confident we can stand behind the results. This model applies machine learning to calibrate AVM values and ingests new data from multiple sources each day to maintain an updated view of each property on record. The values on every property are refreshed weekly.

The value comes with a low and high range based on the confidence of the predicted value. The higher the confidence, the smaller the range. Confidence is either High (H), Medium (M), or Low (L) and is based on the FSD (Forecast Standard Deviation) to convey how reliable the AVM is. Generally, ClearAVMs with an FSD between .01 and .13 are of High confidence while 0.3 FSD is the lowest.

How to use ClearAVM (continued)

Effective Date

The effective date will be the date the order was placed.

Time Zone

Our AVM date stamps are based on Coordinated Universal Time (UTC).

Property Details

Property characteristics such as bed/bath count, GLA, and the source of this data is listed here.

Listing Event History

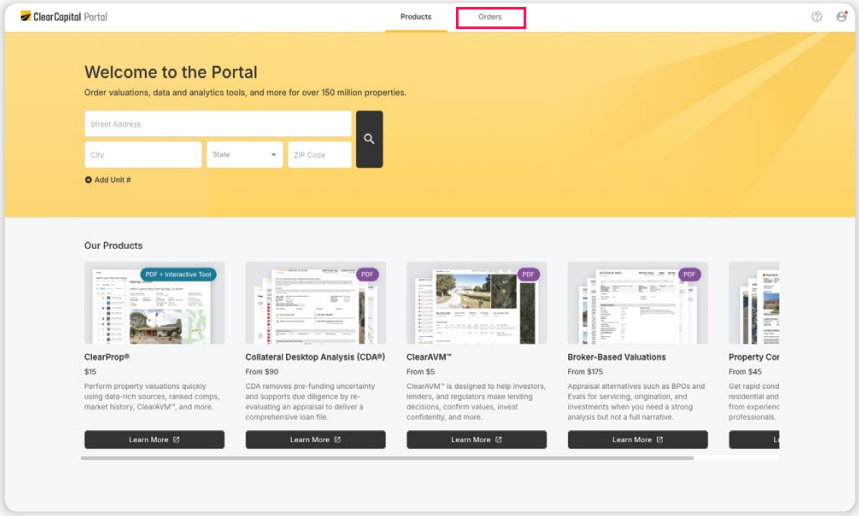
The most recent MLS listing events and details are displayed here for the subject property.

Comparables

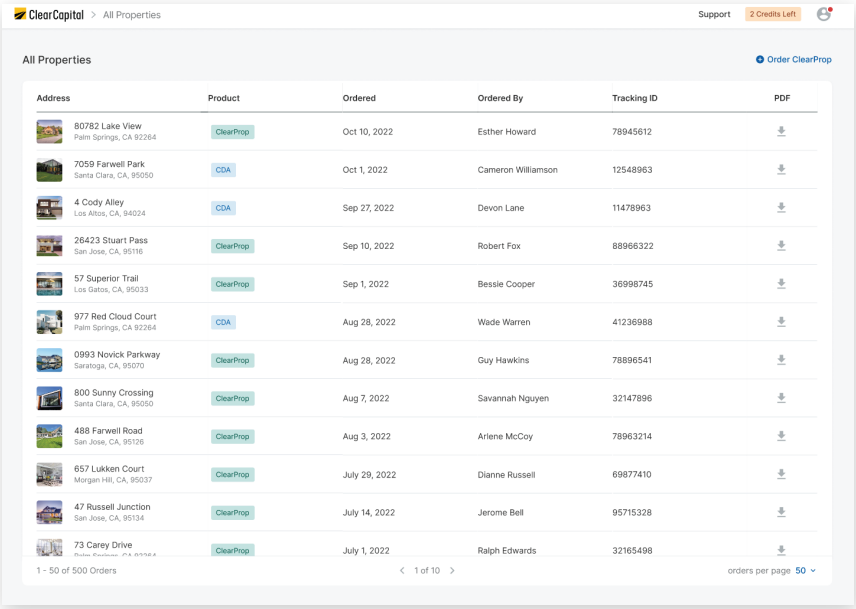
A list of comparable properties are provided. These are recently sold or listed properties that are sorted by our comp ranking algorithm in order to find the most similar properties to the subject based on the main characteristics, distance, and recency.

View your orders

To view your current and past orders, navigate to the Orders tab.



You will see a list of all your orders. From here, you can easily download completed PDF reports or click on an item to view the order in full.



Receive Help

Go to support.clearcapital.com to find self-help resources.
Select "**Get Help**" and fill out the contact form.
Our support team will respond to you shortly.

Call our support line at 530.550.2500 (option 2)
during our business hours, Monday–Friday, 6:00 a.m.–6:00 p.m. PT.

To learn more about Clear Capital products, visit **clearcapital.com**.

About Us

Clear Capital is a national real estate valuation technology company with a simple purpose: to build confidence in real estate decisions to strengthen communities and improve lives.

Our goal is to provide customers with a complete understanding of nearly every U.S. property through our field valuation services and analytics tools, and improve their workflows with our platform technologies. Our commitment to excellence – wherever it leads, whatever it takes® – is embodied by our team members and has remained steadfast in this pursuit since our first order in 2001.

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