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Employees and Appraisers

Use the *Employees and Appraisers* feature in ACI365 to add, edit, and manage employee information. Employees include appraisers and office staff.

Add an Employee

1. In the *Management Section*, click **Employees and Appraisers**.
2. Click the **Add Employee** link.
3. Enter contact information, login credentials, and payroll details. See *Employee Details* for additional information.
4. Click **Add** to create the employee record, or click **Reset** to clear the fields and start over.
5. Click **Home** to return to the ACI365 homepage.

Employee Details

General Information

Add Employee

Fill in all information and click **Add User** to add a new user to the system.

First Name: <input type="text"/>	Email: <input type="text"/>
MI: <input type="text"/>	Username:(User Names are CaseSensitive) <input type="text"/>
Last Name: <input type="text"/>	Password:(Passwords are Case Sensitive) <input type="text"/>
Office Phone: <input type="text"/> - <input type="text"/> - <input type="text"/>	Challenge Question: <input type="text" value="What is your fathers middle name?"/> <input type="button" value="v"/> <input type="button" value="?"/>
Home Phone: <input type="text"/> - <input type="text"/> - <input type="text"/>	Answer: <input type="text"/>
Cell Phone: <input type="text"/> - <input type="text"/> - <input type="text"/>	
Fax Phone: <input type="text"/> - <input type="text"/> - <input type="text"/>	
Address: <input type="text"/>	
Zip/Postal Code: <input type="text"/>	
Country: <input type="text" value="United States"/> <input type="button" value="v"/>	

First Name

The employee's first name.

MI (Middle Initial)

The employee's middle initial.

Last Name

The employee's last name.

Office Phone

The employee's office telephone number. The office telephone number is displayed in the appraiser's profile on the company website.

Home Phone

The employee's home telephone number.

Cell Phone

The employee's cell phone number.

Fax Phone

The employee's fax number. The fax number is displayed in the appraiser's profile on the company website.

ZIP/Postal Code

The employee's ZIP Code or Postal Code.

Country

The employee's country of domicile.

Email

The employee's e-mail address. Notices for orders assigned to the appraiser are delivered to the appraiser's e-mail address.

Username

The name used to access the ACI365 site. Username is case-sensitive.

Force Password Change (Available only when editing an employee record.)

Select *Force Password Change* to prompt the user to reset the password the next time they log in to the site.

Password

The password associated with the username. Password is case-sensitive.

Challenge Question

Encourage employees to select a question from the drop-down list. If an employee forgets the password in the future, a correct response to the *Challenge Question* allows the employee to create a new password.

Answer

The response to the *Challenge Question*.

Employee License/Certification

License and certification information populates the Order form on ACI365 orders downloaded to ACI. License and certification information are not displayed on the company website.

Employee License/Certification	
Certification Number	License Number
Certification State	License State
	License Expiration Date

Certification Number

The appraiser's certification number.

Certification State

The state name or abbreviation of the state issuing the certificate.

License Number

The appraiser's license number.

License State

The name or abbreviation of the state issuing the license.

License Expiration Date

The expiration date of the license.

Access Level

Select the employee's site access level from the drop-down list.

Access Level
Please select the user's access level. <input type="button" value="-Choose-"/>

Owner - Has access to add, change and edit *any* information regarding this account.

Manager - Has access to prepare, change and edit any information for any record, appraiser, accounts receivable, payroll, etc.. *Cannot* edit Company information.

Employee - Has access to enter status updates for *their* records, view *their* pay history, etc. *Cannot* edit records, add records, etc., other than to input dates and comments regarding one of *their* records.

Owner

The owner has access to add, change, or edit all information in the ACI365 site. Only one owner role is allowed per company.

Manager

Managers have access to prepare, change, and edit all information in the ACI365 site, except *Company Information*. Managers cannot edit the *Company Information*.

Employee

Employees have access to their own records and can enter status updates and view pay history. Employees cannot add new orders.

Employee Access

Employee access governs the employee's site permissions. Designate at least one employee as a super-user with full site permissions.

Employee Access

<input type="checkbox"/> Add Order	<input type="checkbox"/> Edit Product Fees	<input type="checkbox"/> Manage Orders/Records
<input type="checkbox"/> Business Summary Report	<input type="checkbox"/> Edit Coverage Area	<input type="checkbox"/> Edit Employee Information
<input type="checkbox"/> Appraiser/Company Report	<input type="checkbox"/> Edit Company Webpage	<input type="checkbox"/> Calendar/Schedule Manager
<input type="checkbox"/> Audit Report	<input type="checkbox"/> Control Panel	<input type="checkbox"/> Late Payment Notification Settings
<input type="checkbox"/> Client Invoices Owed Report	<input type="checkbox"/> Edit Client Information	<input type="checkbox"/> Manage/Prepare Payroll
<input type="checkbox"/> Accounts Receivables	<input type="checkbox"/> Edit Company Information	<input type="checkbox"/> Report Generator

Employee Type

Employee Type

Check the box next to "Active Appraiser" for any person that is an appraiser. Only those persons that have this box checked will be listed on the site as an appraiser!

If the person you are entering is also a *Supervisor of Appraisers* (signs off on reports as the Supervisor) then also check the Supervisor box to the right.

Is Active Appraiser:	<input type="checkbox"/>
Is Appraiser Supervisor:	<input type="checkbox"/>
Is Quality Control:	<input type="checkbox"/>

Is Active Appraiser

Select *Is Active Appraiser* if the employee is an active appraiser. At least one employee must be designated as an active appraiser.

Is Appraiser Supervisor

Select *Is Appraiser Supervisor* if the appraiser is a supervisory appraiser. An appraiser supervisor must also be an active appraiser.

Is Quality Control

Select *Is Quality Control* if the employee is not an appraiser or supervisory appraiser. For example, a bookkeeper or proofreader.

Supervisor Details

If applicable, select the appraiser's supervisor and enter the payment method details. Another supervisor may be selected when entering an order.

Supervisor Details

Supervisor

Supervisor Commission % ?

Supervisor Flat Fee \$?

Supervisor

Select the appraiser's supervisor from the drop-down list. Employees designated as Appraiser Supervisor are included in the list.

Supervisor Commission

Enter the supervisor's commission rate, if the supervisor receives a percentage of the

appraisal fee. Enter the commission as the actual percentage amount e.g., 20, 5.5, 3. If the supervisor earns a flat fee, leave this field blank.

Supervisor Flat Fee

Enter the supervisor's set fee in dollars, if the supervisor is paid a flat rate per appraisal. If the supervisor earns commission, leave this field blank.

Quality Control Details

If applicable, select the default quality control employee associated with this appraiser, and enter the payment method details. Another quality control employee may be selected when entering an order.

Quality Control Details	
Quality Control	N/A
Quality Control Commission	0 % ?
Quality Control Flat Fee	0.00 \$?

Quality Control

Select the quality control employee from the drop-down list. Employees designated as Quality Control are included in the list.

Quality Control Commission

Enter the quality control employee's commission rate, if quality control receives a percentage of the appraisal fee. Enter the commission as the actual percentage amount e.g., 20, 5.5, 3. If the quality control employee earns a flat fee, leave this field blank.

Quality Control Flat Fee

Enter the quality control employee's set fee in dollars, if quality control is paid a flat rate per appraisal. If the quality control employee earns commission, leave this field blank.

Wage Details (ACI365 Worksite Only)

Select the employee's payment method under Wage Details. Wage details are required to use the payroll function in the ACI365 Worksite.

Wage Details

How is this person paid? Please check the appropriate description for this employee/independent contractor. This information is needed for the Payroll function of the ACI365. Be sure to click the circle next to the appropriate payment method!

<input checked="" type="radio"/> Salary (Yearly)	<input type="text" value="0.00"/>
<input type="radio"/> Hourly Wage	<input type="text" value="0.00"/>
<input type="radio"/> Salary/Commission	<input type="text" value="0.00"/> <input type="text" value="0"/> %
(Yearly Salary + Commission Rate) Please enter a whole number for the commission rate (e.g.45)	
<input type="radio"/> Hourly Wage/Commission	<input type="text" value="0.00"/> <input type="text" value="0"/> %
(Hourly Pay + Commission Rate) Please enter a whole number for the commission rate (e.g.45)	
<input type="radio"/> Commission Only	<input type="text" value="0"/> %
(Commission Rate) Please enter a whole number for the commission rate (e.g. 45)	
<input type="radio"/> Flat Fee Per Appraisal	
Because appraisal fees differ for each appraisal product, Fees paid to the appraiser are entered when the record is initially entered. There is not an option to have a default Fee.	

Appraiser Paid When Client Pays ?

salary paid: Weekly
 Every Other Week
 Bimonthly
 Monthly

Salary (Yearly)

Enter the employee's annual salary in dollars.

Hourly Wage

Enter the employee's hourly rate.

Salary / Commission

Enter the employee's annual salary and commission rate. Enter the commission as the actual percentage amount e.g., 20, 5.5, 3.

Hourly Wage / Commission

Enter the employee's hourly rate and commission rate. Enter the commission as the actual percentage amount e.g., 20, 5.5, 3.

Commission Only

Enter the employee's commission rate. Enter the commission as the actual percentage amount e.g., 20, 5.5, 3.

Flat Fee Per Appraisal

Enter the per-appraisal fee.

Appraiser Paid When Client Pays

Select this option if the appraiser is paid when the order is marked paid.

Salary Paid

Select the payment frequency: weekly, every other week, bimonthly, or monthly.

Tax Details

Complete the *Tax Details* section when using percentages to calculate payroll tax withholdings. When taxes are withheld based on the IRS Tax Tables, leave the FWA, FICA, and State fields blank.

Tax Details

Taxes withheld? Yes
 No

If you choose 'Yes' to the question above, and normally use **percentages** to calculate payroll taxes, please enter the appropriate tax rates for the following tax withholdings. **Enter each field as a whole number (i.e.- 4.5 not .0045)** If your state does not withhold taxes for wages, enter "N/A" for the State Tax rate. These will show as the *default* tax rates when you prepare payroll for this employee/appraiser. Should need adjusted, you will be able to do such adjustments at the time you are preparing the payroll statement.

If you use the **IRS Tax Tables** to calculate payroll taxes and wish to enter the amount owed in a currency format, do not edit or enter anything in the percentage fields below. Be sure that you have told the system that you pay taxes this way. You must have checked the proper box (circle) in your *Company Information Profile*. You can do this, or verify this, by clicking **Edit Company Information** from the Management tab on the Main Menu.

FWA:

FICA:

STATE:

Taxes Withheld

Select **Yes** if taxes are withheld, and enter the appropriate withholding percentages for FWA, FICA, and state taxes.

FWA

The Federal Withholding Allowance.

FICA

The Federal Insurance Contributions Act withholding.

STATE

The state income tax.

NOTE: Enter withholding as the actual percentage amount e.g., 20, 5.5, 3.

Edit Employee Information

1. In the *Management Section*, click **Employees and Appraisers**.
2. Click the **Edit** link for any Active User.
3. Edit employee details. See *Employee Details* for additional information.
4. Click **Save** to accept the changes.
5. Click **Home** to return to the ACI365 homepage.

Deactivate an Employee

1. In the *Management Section*, click **Employees and Appraisers**.
2. Click the **Set Inactive** link for any Active User.
3. Click **OK** to deactivate the employee.
4. Click **Home** to return to the ACI365 homepage.

NOTE: Inactive employees are unable to log in to ACI365, and are not included in the appraiser, supervisory appraiser, or quality control drop-down lists.

Reactivate an Employee

1. In the *Management Section*, click **Employees and Appraisers**.
2. Click the **Set Active** link for any Inactive User.
3. Click **OK** to reactivate the employee.
4. Click **Home** to return to the ACI365 homepage.