



As a Super Admin, you have full control over your company's AppraVia configuration. Complete these steps to set up your workspace before inviting your team. Items marked with an asterisk (\*) are recommended before going live.

## Essential Setup \*



### Add Your Company Branding

- Go to Company Settings from the user menu (top right)
- Open the Branding tab and upload your company logo
- Set your brand color -- it appears on emails, invoices, and the client portal
- Supported formats: PNG or JPG, minimum 300x100 px



### Complete Your Office Info

- In Company Settings, open Office Info
- Enter your company name, address, phone, and email
- Add your Federal Tax ID (EIN) -- this appears on invoices
- Add your website URL for client-facing documents



### Configure File Number Format

- Open Company Settings and go to the File Numbers tab
- Set a prefix (e.g., your initials or company code)
- Choose your starting number and minimum digits
- Preview the format before saving -- new orders will auto-number from here



### Customize Field Options (Dropdowns)

- In Company Settings, open Field Options
- Customize the lists for: Report Types, Report Purposes, Loan Types, Order Sources, Property Types, and Client Types
- Click + Add for new options, drag to reorder, or X to remove
- These appear throughout the app in order forms and filters

#### Tip

Complete steps 1-4 before adding users. This ensures your branding, file numbers, and dropdown options are ready when your team starts working.

## Team Setup



### Add Your Team Members

- Navigate to User Management from the main menu
- Click Add User and fill in their name, email, and a temporary password
- Assign a User Role (Admin, Appraiser, Reviewer, Trainee) -- this controls their permissions
- You can send them a Welcome Email with login credentials directly from the creation screen



### Define User Roles & Permissions

- Each role has configurable permissions across Orders, Calendar, Clients, Billing, Reports, and Administration
- The default roles (Admin, Appraiser, Reviewer, Trainee) can be customized
- Create additional roles as needed for your team structure
- Only Admin-level roles should have "Manage Users" and "Manage Company Settings" permissions

## Additional Configuration

### Import Legacy Data

- Go to Company Settings and open the Import tab
- Choose ANOW Import if migrating from ANOW, or Custom CSV for other systems
- Follow the column mapping wizard to match your data fields
- Imported orders appear alongside any new orders you create

### Set Up Client Link (Portal)

- In Company Settings, open the Client Link tab
- Set your company identifier for portal URLs
- Customize the welcome message clients see when they log in
- Embed the Client Link portal or the guest order form directly on your company website using the provided HTML embed code

### Configure MailVia & Notifications

- Review MailVia settings in Company Settings for email-to-order automation
- Set up appointment reminders in the Reminders tab
- Each user gets a unique MailVia email address for forwarding orders

### Engagement Letter Templates

- Go to Company Settings and select Engagement Letters
- Create your engagement letter template with auto-fill fields
- Templates populate with order data when sent for e-signature
- Signed letters are automatically stored in the order's documents

### Need Help?

- Help Center -- Click the question mark icon in the app to browse setup articles
- AI Chat Assistant -- Available from the top menu bar, near the Help icon
- Email [support@appravia.com](mailto:support@appravia.com) for platform-level questions or billing inquiries