



Welcome to AppraVia! This guide walks you through the key steps to get your account set up and ready to use. Complete these items at your own pace -- most take just a few minutes.



Configure Notifications

- Go to User Preferences and open Notifications
- Choose which events trigger email or in-app alerts
- Set your preferred appointment reminder timing
- Enable or disable daily summary emails



Set Up Quick Templates

- Quick Templates let you save reusable text for notes and messages to clients, borrowers, and entry contacts
- Create templates from any note field via the template icon
- Use them for common update messages, client replies, and status notes



Set Up Engagement Letters

- Navigate to Company Settings and select Engagement Letters
- Create or customize your engagement letter template
- Templates auto-fill with order data when sent for e-signature



Use Your MailVia Address

- Each user gets a unique MailVia email address
- Find it in User Preferences under the MailVia section
- Forward order emails to it -- AppraVia auto-creates orders from them
- Add your MailVia address to your email contacts for easy access



Navigate the App

- Orders tab -- view, search, and manage all your appraisal orders
- Calendar -- see scheduled appointments and deadlines
- Map -- visualize order locations geographically
- Clients -- manage your client and AMC contacts
- Reports & Insights -- analytics and reports (optional, depending on your user role)



Add AppraVia to Your Phone

- Install AppraVia as a web app on your phone for one-tap access
- iPhone (Safari): tap the Share icon, then Add to Home Screen
- Android (Chrome): tap the menu (three dots), then Install app or Add to Home screen
- See the Help Center article "Install AppraVia on Your Phone" for full instructions

Need Help?

- Help Center -- Click the question mark icon in the app to browse articles and guides
- AI Chat Assistant -- Available from the top menu bar, near the Help icon
- Contact your administrator if you need permissions or role changes