An Introduction

To

WinTotal

Aurora

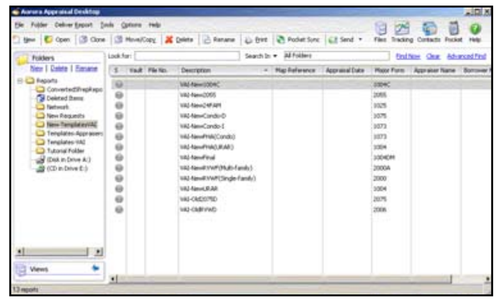
Valuation Appraisals, Inc.

Rev. 1b/06

WinTotal Manual

What is…

… Appraisal Desktop?

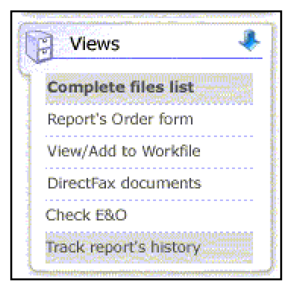


When starting WinTotal, after selecting the user, typically the Appraisal Desktop will show. (If it doesn't start automatically, click **Open**.) The different areas of the Appraisal Desktop are accessible by clicking their icon on the right top corner, like the **Files** and **Contacts**.

… File PowerView?

The Appraisal Desktop's File PowerView or File Cabinet is a critical and very powerful module. It lists all report files, and shows them in "folders". It's similar to Windows Explorer in that the folders are on the left and files on the right. The File Cabinet provides management tools that allow the appraiser to both manage the files and modify them without even opening them. Some functions are:

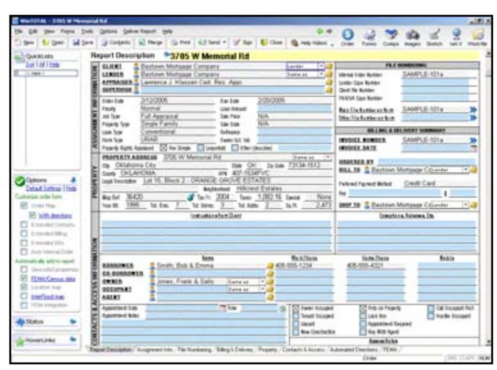
- **Look for.** This searches the File Cabinet for specific files based on the contents of the file. For instance, to search for a property at 123 Main Street, just type "123 Main Street" in the **Look for** field and click **Find now** to quickly find a file. Click on **Advance Find** to search in a particular field.
- **Clone.** Creates an exact copy of the report.
- **Move/Copy.** Easily copy or move the selected file(s) to another folder or disk. Files can also be dragged and dropped into other folders.
- **Print.** Without opening a file, a report can be sent to the printer.
- **Send** - WinTotalcan be configured to send files using Outlook. Just select a file, click **Send** and follow the prompts until the report has been delivered.



The File PowerView also provides links to different Views and is located in the bottom left-hand corner of the screen. One of the important views is the "Report's Order form" which replaces the **Info** button. This will allow the appraiser to make changes without opening the report.

… The Order PowerView

When a report is created, the Order form is the first thing that opens regardless of the method used. Certain data fields in the Order form (formerly known as the **Requester**) are copied into the actual report. For instance, by selecting the appraiser name in the Order form, the appraiser name and license information will be filled in the report.

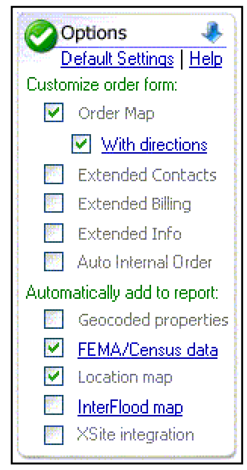


Some advantages are:

- Since the Order form is a form, QuickLists can be built and used in filling out any new order request.
- The order form can be printed just like any other form in the report.
- A map and driving directions from the office to the subject property can be obtained on the fly as the Order form is being filled in.
- Using the "geocoding" feature, latitude and longitude information can be added to the report. This information can then be used to search for properties or appraisals by subject location.

In addition, the order form in the **Order** PowerView is actually a dynamic form that can be changed to meet any need. The Order form must be customized before filling it out. To customize the order form, simply check the boxes for the desired customizations in the **Options** pane on the left. Here's a brief description of each of the options:

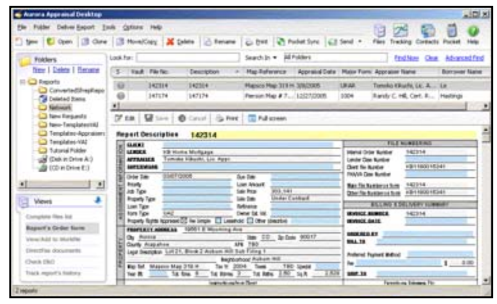
- **Order Map –** Automatically adds a map to the order form, as the order is fill out.
- **With directions –** If including a map in the order form is selected, checking this option adds directions from the office or an alternate location to the subject property.
- **Extended Contacts –** Adds new sections to the order form permitting the user to add detailed information about the contacts.



- **Extended Info –** Adds another section to the order form allowing notes to be added and a wealth of other information about the subject property.
- **Geocoded properties –** Automatically adds geocoding information to the report allowing searches using the location in the File Cabinet and the **Comps PowerView**.
- **FEMA/Census data –** Automatically adds IDC data to the appropriate fields in the report as the Order form is filled out (this functionality is only available at the office).
- **Location map –** Automatically adds a preliminary location map centered on the subject property to the report.

Note: **Extended Billing**, **Auto Internal Order, InterFlood** map and **XSite** integration must **remain unchecked**, as we don't use these services or functions.

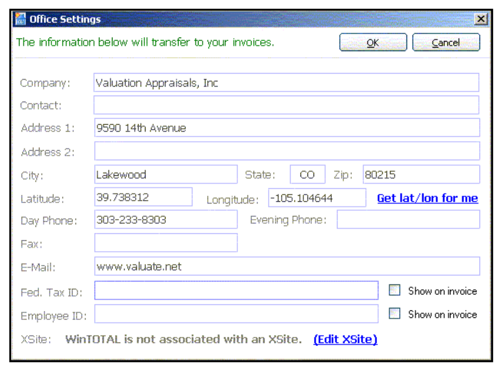
Accessing the Order Form



There are three methods to display the Order Form:

- By cloning a report or template, as explained in "Creating a New Report Using Template".
- In the File Cabinet area, highlight the report and click on Report's Order form on the left-hand side of the Views menu.
- With the report open click on Forms.

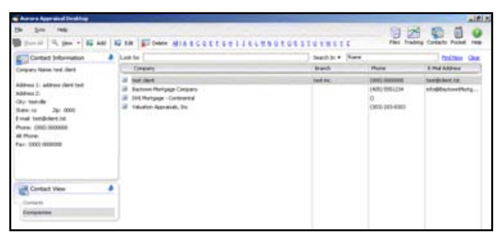
First Time Configuring the Office Settings



Before filling the order form, the office settings must be configured so WinTotal can fill out the data correctly. To configure:

1. Choose **Change office settings…** from the **Options** menu in WinTotal.
2. When the **Office Settings** dialog appears, just fill out the details about the office in the fields provided.
3. At the **Latitude** and **Longitude** fields, use the **Get lat/lon for me** link to automatically retrieve the office's coordinates from the Internet.
4. When finished, click **OK** to save the office settings.

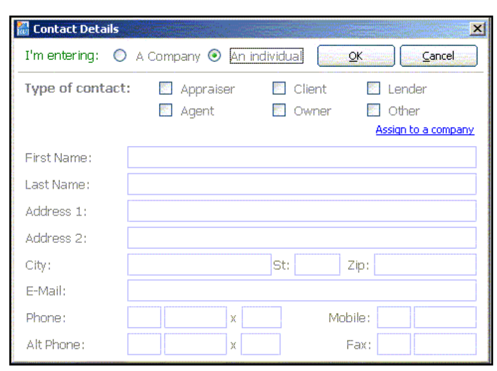
… Contacts?



WinTotal contains a complete contact database to store and retrieve information about all client contacts. WinTotal has the ability to easily associate the contacts with a company contact in the list, this way different contacts from the same company can share the same company information.

Adding and editing contacts

To add a new contact to the database:



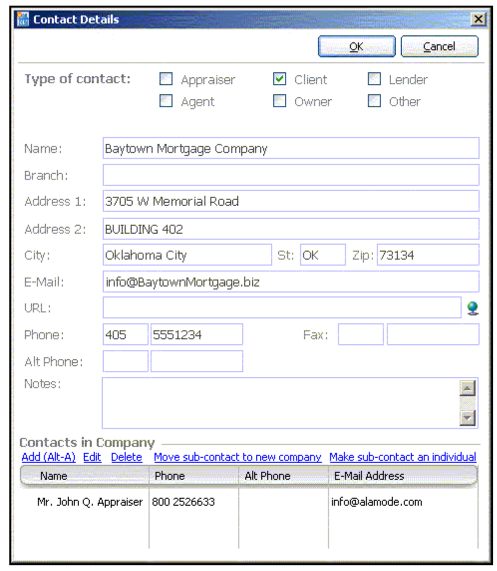
1. From the **Contacts** screen, click **Add** on the menu bar.
2. When the **Contact Details** dialog appears, select the option at the top to indicate whether a **Company** or an **Individual** is being added.
3. Next, select at least one option from the **Type of contact** check boxes.
4. Be sure that the **Public Contact** box is checked.
5. Next, if an individual is been added, the **Assign to company** link can be used to associate the new contact with an existing company in the database.
6. Now, complete the remaining text boxes for this individual or company.
7. If a company is being entered, individuals that work for that firm also can be added (see next section for detailed instructions). At the bottom of the dialog box, click **Add**. Complete the individual's information and click **OK**. Use the **Edit** and **Delete** links to modify existing contacts for that company.
8. When the contact information is complete, click **OK** to save this contact to the database.

To edit any of the existing contacts, double-click on any entry in the database, or select the contact and click **Edit** in the menu bar.

Select a contact and click **Delete** to remove it from the database.

Adding a new Contact to a Company

When a Company is added to the database, the individual contact should also be entered. Once done, new contacts can be created within that company's profile. To do so:

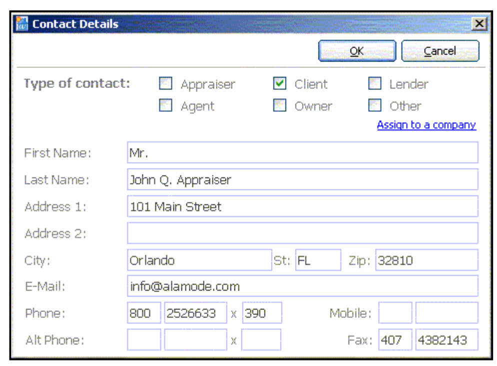


1. From the **Contact** screen, click **Companies** in the **Contact View** pane on the left.
2. Next, find the desired company, click it, and then click **Edit** in the toolbar.
3. When the **Contact Details** screen appears, click the **Alt (Alt-A)** link in the **Contacts at Company** section at the bottom.
4. Another window should appear that allows for an individual to be created within the company. Just fill out the form with all the relevant data and click **OK**.
5. The new contact should appear in the **Contacts in Company** list and any of the following can be done:

   - Edit a contact by clicking it and then clicking **Edit**.
   - Delete a contact by clicking it and clicking **Delete**.
   - Reassign the contact to a new company by clicking it and then clicking **Move sub-contact to new company**.
   - Create a separate contact for the individual by clicking it and then clicking **Make sub-contact an individual**.
   - Add additional contacts by clicking **Add** and repeating the process outlined above.

6. Whenever the user is finished adding the contacts in the company, just click **OK** to save the changes.

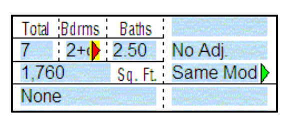
Associating existing contacts with a Company



If a contact has already been entered as an individual and then becomes a contact within a company, that individual's contact record can be easily associated with a company at any time. To do so:

1. From the **Contact** screen, click **Contacts** in the **Contact View** pane on the left.
2. Find the contact to associate with an existing company in the database, click it, and then click **Edit** in the toolbar.
3. Now, click **Assign to Company** in the upper right corner of the **Contact Details** dialog.
4. Finally, choose the company to associate the contact with from the list provided and then click **OK**.

… A Green or Red Arrow next to the Field?



WinTotal will never let more into a field than can be printed. A GREEN arrow next to a field means the text can't be displayed due to differences in video and printer resolutions, but will print. A RED arrow means there is more text entered than will fit, and needs to be shortened to fit.

Things to Keep in Mind

Differences Between Network (Enterprise) and Home (Professional) WinTotal

- **Location Map**: Network and Home WinTotal versions differ in their resolution. WinTotal on the Network is Optimal (1200 x 1800 pixels), and WinTotal on Home PC is High (800 x 1200 pixels).

- **IDC Data**: Network WinTotal has the ability to download Census and Flood Data by clicking on **IDC Data…** icon. This is not available in the Home version.

- **Updates**: Both versions of WinTotal automatically check for system updates. Whenever WinTotal prompts that there are updates to be installed, it is save to allow the updates.

Standard File Locations

We have standardized the location of the various files and templates used in WinTotal. The three standard folders are:

- **Reports** – All VAI reports are located in a folder called **Reports-VAI** in the **Appraisal Desktop**. When using Windows Explorer, the folder name will appear as **RPTS-VAI.FLD**.
- **VAI Templates** - All company source templates are located in a folder called **Templates-VAI** in the **Appraisal Desktop**. When using Windows Explorer, the folder name will appear as **TMPL-VAI.FLD**.
- **Appraisers Templates** - All appraiser templates are located in a folder called **Templates-Appraisers** in the **Appraisal Desktop**. When using Windows Explorer, the folder name will appear as **TMPL-APP.FLD**.
- **Converted SFREP Reports** - All converted reports are located in a folder called **Converted SFREP Reports** in the **Appraisal Desktop**. When using Windows Explorer, the folder name will appear as **SFREP-VAI.FLD**.

Standard File Names

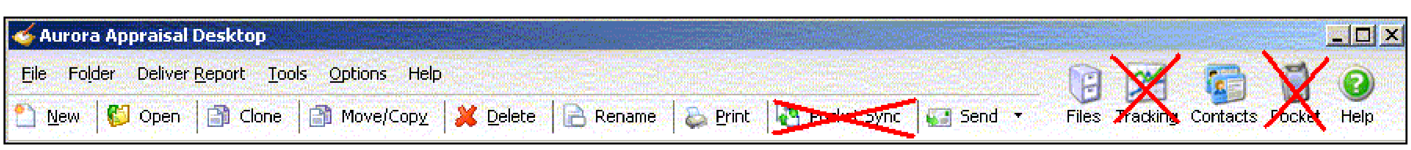
- Report file names are the Randa No. For this reason be sure that on the **Order PowerView**, under **Options**, the **Auto Internal Order** box is unchecked.
- To keep comps for future references but not as part of the Final Report clone the report before deleting the extra comps, naming this new clone report with the Randa No and a "**T**" (i.e. 123456T). Leave this template report in the **Reports-VAI** folder.
- Under VAI Templates should be only the VAI standard templates. This files must not been change without revision, and will have the VAI at the beginning.
- Appraisal Templates, under Templates-Appraisers, should have the initials of the appraiser they belong to. I.e. VMB-Condo.

<u>**NOTE**</u>: Anything that doesn't belong, or is not well labeled, will be removed.

What not to Click on…

There are several features of WinTotal that VAI does not use. Please avoid clicking on these items:

- EDI
- XSite
- InterFloods (FloodMaps)
- QuickPix
- Vault



What needs to be sent to support team about the report?

Let Support Team know if the report has extra pages that cannot be deleted and doesn't need to be on the report. Otherwise the report needs to be sent with:

- ❑ The right forms
- ❑ Right comparables
- ❑ In the right order

Note: To keep comps for future reference but not as part of the Final Report, clone the report before deleting the extra comps, naming this new clone report with the Randa No and a "**T**" (i.e. 123456T). Leave this cloned report in the **Reports-VAI** folder.

Deleting Backup Files

Backup files should be periodically purged. These files have the extention "BZ1".

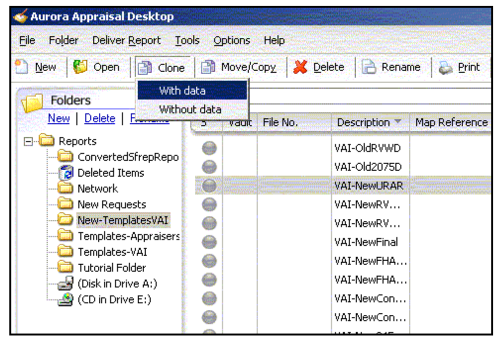
Tech support will do this maintenance on the office installation. Appraisers with home installations should do this once a month:

1. Double click on **My Computer.**
2. Right click on the **C:** drive and then click on **Search.**
3. Type ***.BZ1** in the **All or part of file name** field, and click **Search.**
4. Sort the results by **Date.**
5. Delete the BZ1 files that are more than a week old.

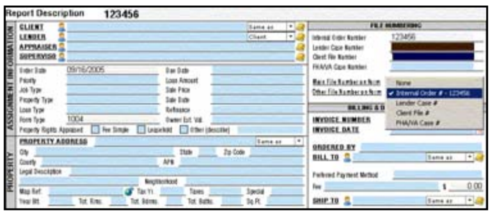
Once completed, close the **Search** and **My computer** windows.

Creating and Filling Out a New Report

New Report Using Template



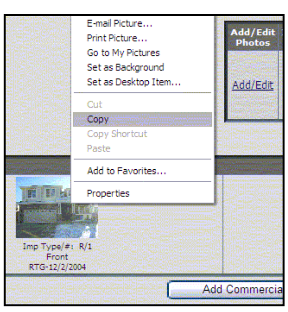
1. Go to the **File PowerView** area of the Appraisal Desktop.
2. Find the desired template in the **Templates-VAI** or **Templates-Appraisers folder**, click on the template once to highlight it.
3. Click **Clone** and select **With data**. This will bring up the **Order PowerView**. The data typed in the Order form will transfer into the forms of the report.
4. In the space provided for **Report Description**, type the new Randa number.



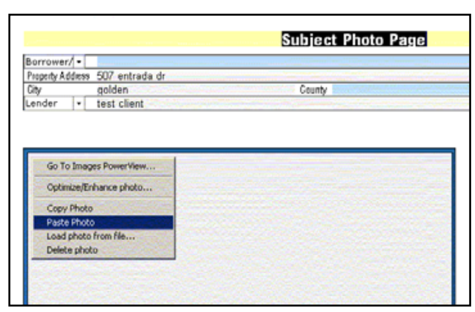
5. Now, on the right under **File Numbering** enter appropriate file numbers. **Internal Order Number** is the same as file Description (Randa No), and if another number is required, place it in under **Lender Case Number**, **Client File Number**, or **FHA/VA Case Number** as appropriate.
6. Next select **Internal Order #** from the **Main File Number on Form** dropdown menu, and select **Lender, Client or FHA/VA #** from the **Other File Number on Form** dropdown menu, depending on what needs to show on the report (i.e. **–FHA/VA Case #** if it is a FHA/VA report). Format the FHA Case # as follows: FHA #052-3534701.
7. On the **Assignment Information** section, select the **Client** or **Lender** from the dropdown list. If this is a new Client or Lender entry, type the name in the **Client** field, click on the book icon, click **Add**, and finish entering all available information.
8. The **Appraiser** and **Supervisor** (if applicable) must be completed on this form. The **Appraiser** and **Supervisor** can be selected from the dropdown list provided.

9. Once the **Property Address**, **City**, **State** and **Zip Code** is entered under the **Property** section, a map and directions to the subject property are automatically added if **Order Map** and **With directions** options were checked. Likewise, if **FEMA/Census data** or **Location map** options where checked, the corresponding data is automatically added to the report before opening any form. Otherwise use the icon to insert a location map and census data into the report.
10. Finally, click on **Save** and close the report.
11. This report will be located under the **Templates-VAI** or **Templates-Appraisers** folder. Move the new report to the **Reports-VAI** folder by clicking on the **Move/Copy** button, then click on **Move**, and select the **Reports-VAI** folder. Click **OK** to complete.
12. Go to the **Reports-VAI** folder and double-click on the new report to continue and complete the report.

Adding Photos to a Report

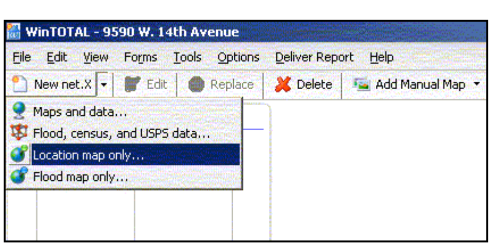


1. With the report open, go to the page where the photos are to be inserted.
2. Search for the photo on Colorado Comps. Right click on the desired photo, and click on **Copy**.
3. Now go back into WinTotal where the photo needs to be inserted, right click on the space, and click on **Paste.**



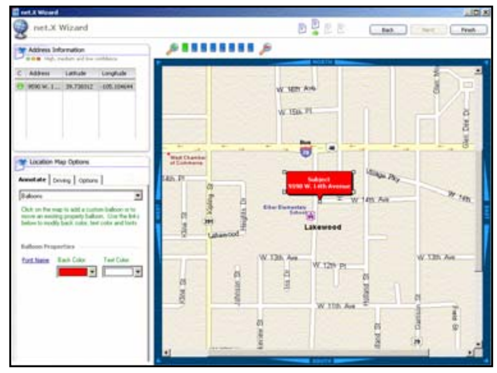
Location Map

WinTotal's mapping tools run in the background so that the map never actually has to be downloaded manually to get it into the report. The subject and comps are automatically placed on the maps when the address is added to a report. If a comp is later deleted, the map doesn't need to be re-downloaded. To take advantage of WinTotal's automatic mapping capabilities set the options in the **Order** PowerView when the report is created.



Manually Downloading a Location Map

1. The subject address must be entered into the report prior to downloading a Location Map..
2. On the PowerView Toolbar, click on **net.X**.
3. If the report has an existing map that needs to be changed click **Replace**, otherwise if this is a new location map on the report click **New net.X** and select **Location Map only…**

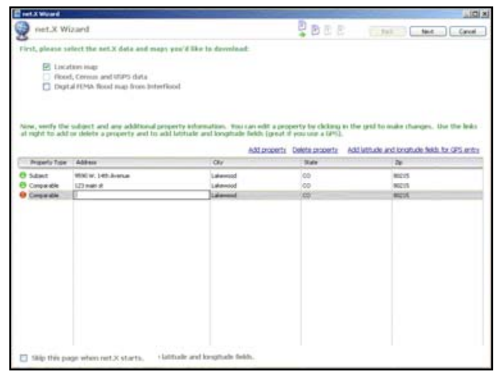


4. Continue to follow the prompts until the map is downloaded.
5. Now, depending on how data was entering into the forms, WinTotal may prompt for extra address information. This will be most common when information other than standard address, city, state and ZIP data (ex: unit number or map reference) is in the comps grid. Click **OK**.
6. Once the map is downloaded, arrows and icons can be added using the tools on the right side of the screen, or balloons can be movedto a new location if needed.
7. When everything is finished click **Finish.**

Note: Clicking on **Edit** or double clicking in the map will take the Map back to the Edit mode.

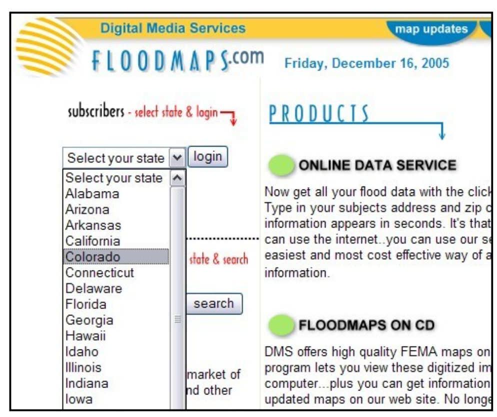
Map Palette - Address Tab

When the map is downloaded, the net.X Wizard will show two map sections: **Address Information** and **Location Map Options**. The **Address Information** will show the confidence level of the addresses marked. There are several options available:

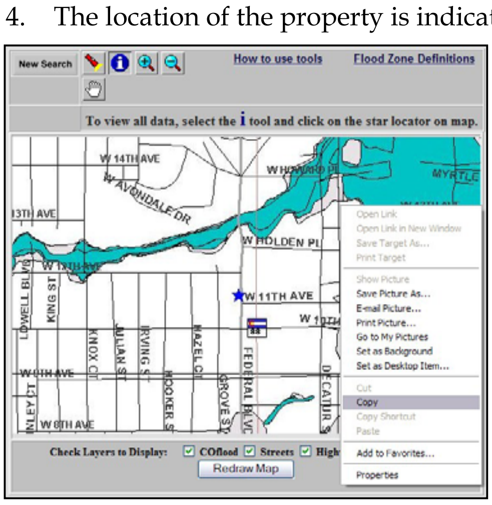


- **To add another property:** click **Back** to go back to the wizard's first step, enter the addresses of the new properties, and click **Next.** These properties will be labeled as Comparable. To add other properties such as listings or rentals, which are not automatically imported into the Mapping Utility, click the location on the map where the added property should be and type the address and caption.
- **To edit a property address:** If a property has a red circle there may be a typographical error. Click **Back** to go back to the wizard's first step, click the property address, and retype it. Then see if the property is placed on the map correctly.
- **To move a caption:** If the balloons are overlapping, click the balloon and drag it to a more appropriate location. Notice the anchor stays in place.
- **To delete a caption:** click the balloon, and then press the DELETE key on your keyboard. The caption can always be replaced later by reloading the map or retyping the address.
- **To reposition an anchor:** If the anchor is in the wrong spot and not pointing close enough to the property, carefully click the anchor point itself and drag it to the correct location. Notice the distance from the subject is automatically updated. Likewise, if the subject is moved, all comp proximities are updated.

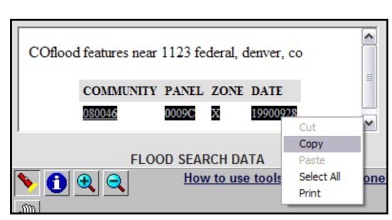
Inserting a Flood Map into WinTotal

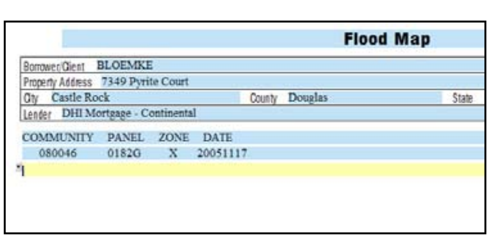


1. Go to www.floodmaps.com, select Colorado under subscribers and click on login.
2. Type the User Name: vai, and Password: winranda12 (both are lower case), and click on Login. **We can have two concurrent users online, so if you are unable to login, please wait a few minutes and try again. When you are done, close the windows so others can use the system.**
3. Type in the address and click on Search. The Street Address - either City and State, or Zip Code are required.
4. The location of the property is indicated by the blue star.



5. If the property can't be located or needs to be repositioned, search by zip code and use the navigation tools above the map to zoom in and out, and mark the property by clicking on the Red flashlight tool and then clicking on the property location inside the map.
6. When the map is ready to be added to the report click on the Information tool, right click on the map and select Copy.
7. Open the Flood Map form on the WinTotal report, right click on the grey area and select Paste. The map will resize itself to fit on the form page.
8. To copy the map information, highlight the second line of the table, right mouse on the selected area, and then click copy.



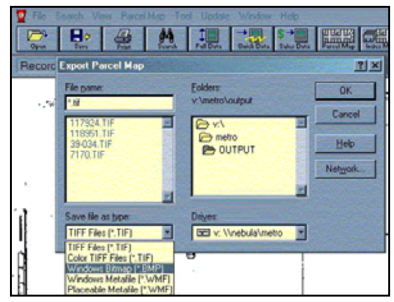

Flood Map

Borrower/Client BLOEMKE
Property Address 7349 Pyrite Court
City Castle Rock County Douglas State
Lender DHI Mortgage - Continental

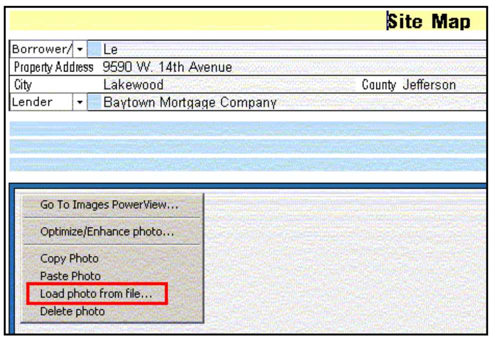
COMMUNITY	PANEL	ZONE	DATE
080046	0182G	X	20051117

9. Go the Flood Map form on the WinTotal report and paste it under the COMMUNITY/PANEL/ZONE/DATE title. Move the text so it is aligned with the title.

Importing a Site Map into WinTotal from MetroScan

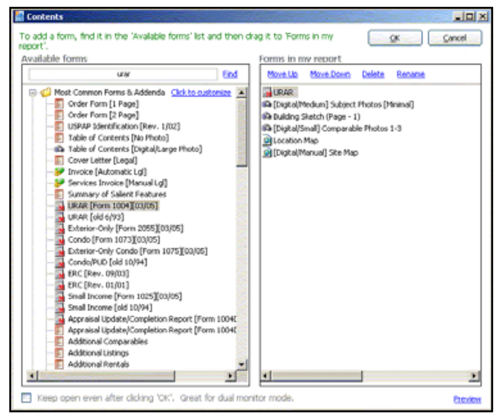


1. In MetroScan get desired plat map view on screen. Annotate it as desired.
2. Press F9 to export the image.
3. Save the image to C:\My Documents (C:\mydocu~1). Use the Randa # as the file name.



4. Change the image type to .BMP. Click the OK button to save.
5. In WinTotal select the [Digital/Manual] Site Map.
6. Right-Click in the area where the image is to be placed and click on **Load Photo from File…**
7. Navigate to the C:\My Documents directory.
8. Select the .BMP file that was saved in step 4. Click the **Open** button.

Adding Additional Pages



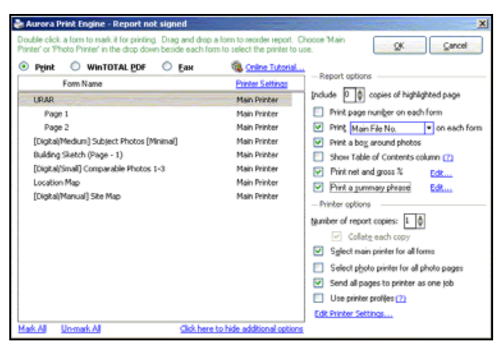
Additional pages not included in a given template can be added as follows:

1. With the report open either on **Order PowerView** or **Form PowerView**, click on **Contents**.
2. Find the desired page on left side of the screen. Use the **Find** field above the **Available forms** column to locate the proper form. Or, scroll through the available forms in the window on the left side. Forms are grouped into folders by type. Double-click any folder to expand it and show the available forms.
3. Double-click on the page name to insert into the report. The inserted page will appear on the right side of the screen.
4. Use the **Up** and **Down** bottoms to place the page in the appropriate sequence.
5. Finally, click **Ok** to save and return to the order form.

Other options:

- To remove a form from the report, select the form and click **Delete.**
- To change the name of a form for the new report, select the form and click the **Rename** link. Type a new name and then click **OK**. Keep in mind that renaming the form here does not affect the default form name, but it is reflected in any future reports created using this report in the Merge process.
- At the bottom of the window is the option to keep the **Contents** window open even after clicking **OK**.

Printing a WinTotal Report



1. Open the desired report in WinTotal, or highlight a report in the Appraisal Desktop.
2. Click on File | Print (or click on the **Print** button)
3. Double-click each form to be printed or click **Mark All** to print everything. An icon appears next to the forms marked. (To "unmark" a form and omit it from printing, double-click it again.)
4. Click on **Printer Settings**.
5. If Hp2300Pool (or the assigned printer) is not the Main Printer:
   a. Click on **Select Main Printer…** Then under the Print Setup select Hp2300Pool (or the assigned printer), and click **OK.**
   b. Then **OK** again
6. If the printing options are not shown, click on **Click here for more Printing Options**.
7. Under **Report Options** select **Print Main File No on each Form** or **FHA-FHA-VA Case No** from the dropdown menu**.** Make sure the check box is selected. Also, make sure **Print a box around photos**, **Print net and gross** %, and **Print a summary phrase** options are check.
8. Under **Printer Options** enter desired number of copies, then check on **Select Main Printer for all Forms** and **Send all pages to printer as one job**.
9. Click **OK** to print the report.

<u>Note:</u> Clicking on the **Print** button on the menu bar while on the **Order** or **Sketch** PowerView, the Order or Sketch are the only forms sent to the printer.

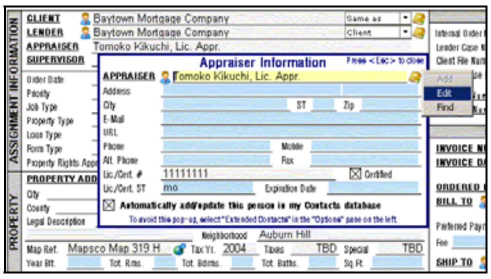
WinTotal FAQs

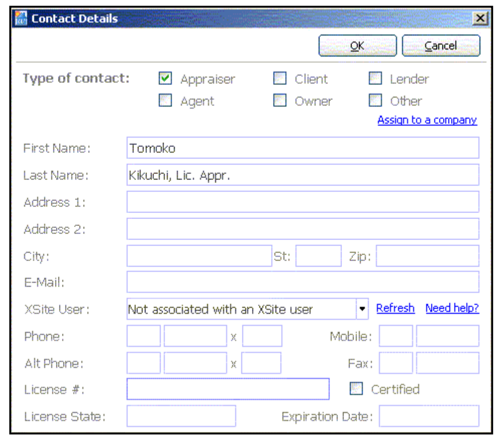
General WinTotal Questions

How do I change the Appraiser License Expiration Date in WinTotal?

To change the License or Certification Expiration date in the WinTotal program:

1. With a report open in WinTotal, click on **Order** at the top right side.
2. Under **Assignment Information**, select the appraiser that needs a new expiration date from the dropdown list by clicking on the icon.



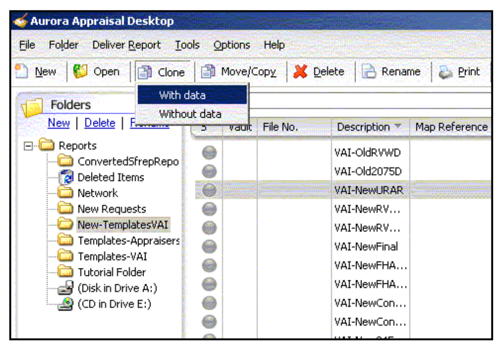


3. On the **Appraiser Information** pop-up, click the icon and select **Edit**.
4. Change the expiration date. Click **OK** to save changes**.**
5. Save and then close the report.

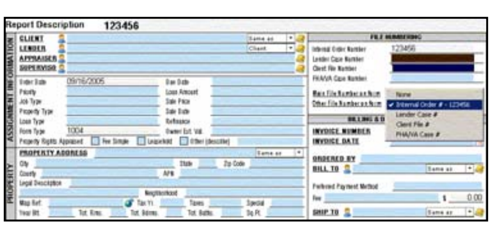
This also can be done through **Contacts** on the **Appraisal Desktop**.

How do I clone a report?

<u>**WARNING:**</u> Cloning a report is not a "perfect science" and data may not be transferred to the new report as you may expect it to. Verify <u>**ALL**</u> information in the new report.



1. Go to the **File PowerView** area of the Appraisal Desktop.
2. Find the file to clone, either by browsing or using the search function. Once found, click it once so that it is highlighted.
3. Click **Clone** and select **With data**. This will bring up the **Order PowerView**. The data typed in the Order form will transfer into the forms of the report. Likewise, anything typed into a form goes back to the Order form. It's bidirectional.
4. In the space provided for **Report Description**, type the new Randa number.
5. Now, on the right side under **File Numbering** enter appropriate file numbers. **Internal Order Number** is the same as file Description (Randa No), and if another number is required, place it in under **Lender Case Number**, **Client File Number**, or **FHA/VA Case Number** as appropriate.
6. Next select **Internal Order #** from the **Main File Number on Form** dropdown menu, and select **Lender, Client or FHA/VA #** from the **Other File Number on Form** dropdown menu, depending on what needs to show on the report (i.e. **–FHA/VA Case #** if it is a FHA/VA report). Format the FHA Case # as follows: FHA #052-3534701.



7. On the **Assignment Information** section, select the **Client** or **Lender** from the dropdown list. If this is a new Client or Lender entry, type the name in the **Client** field, click on the book icon, click **Add**, and finish entering all available information.
8. The **Appraiser** and **Supervisor** (if applicable) must be completed on this form. The **Appraiser** and **Supervisor** can be selected from the dropdown list provided.

9. Once the **Property Address**, **City**, **State** and **Zip Code** is entered under the **Property** section, a map and directions to the subject property are automatically added if **Order Map** and **With directions** options were checked. Likewise, if **FEMA/Census data** or **Location map** options where checked, the corresponding data is automatically added to the report before opening any form. Otherwise use the icon to insert a location map and census data into the report.
10. Finally, click on **Save**. The report is ready for the new assignment.

How do I create a Personal Template?

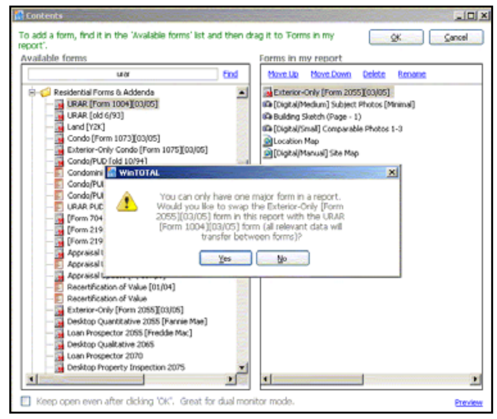
1. Go to the File Cabinet area of the Appraisal Desktop, and select the **Templates-VAI** folder.
2. Click in the Template to personalize once so that it is highlighted.

3. Click **Clone** and select **With data**. This will bring up the **Order** Form.
4. In the space provided for description, type the initials and description of the template (i.e. VMB-URAR)
5. Next, click on **Save** and close.
6. This Template will be located under the **Template-VAI** folder. Move the new template to the **Template-Appraisers** folder by clicking on the **Move/Copy** button, then click on **Move**, and select the **Templates-Appraisers** folder. Click **OK** to complete.
7. Go to the **Templates-Appraisers** folder and double-click on the new template to modify.

Every time data needs to be added, deleted or edited, open the template by double clicking on it to make changes or revisions.

How do I cange the major form type?

If a report was started using one major form, such as the 2005, and needs to be switched midstream to a URAR, it can be done - without losing data - in the Contents PowerView. Find the new major form and add it into the report. WinTotal will detect there is already a major form and prompts to replace the existing major form with the new one. Click **Yes**.



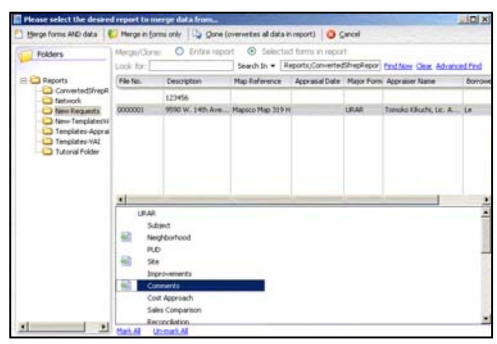
Another example is completing a **Final** for new construction. To accomplish this:
1. Clone the original appraisal and save under the new Randa number.
2. Then go to **Contents**, and double click on **Appraisal Update/Completion Report [Form 1004D][Major Form][03/05]** under **Most Common Forms & Addenda**.
3. WinTotal will detect there is already a major form and prompts to replace the existing major form with the new one. Click **Yes**.
4. This will transfer most of the subject information. Click **Ok** to save changes.

How do I import File Data in WinTotal?

<u>WARNING:</u> Merging a report is not a "perfect science" and data may not be transferred to the new report as you may expect it to. Verify **<u>ALL</u>** information in the new report.

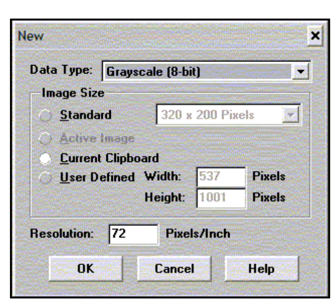
WinTotal allows the importing of data from one report to another at any time from within WinTotal using SmartMerge, whereas cloning can only be done at the beginning of the report. To use SmartMerge:

1. Open the report that needs data copied into it.
2. Click the **Merge** button at the top of the **Order** PowerView.
3. Browse through the Office Manager Folders for the source report. If necessary, use the **Look for** field to locate an appropriate older appraisal.
4. Click to highlight the report to import into the current one.
5. Choose to either merge the **Entire report** or just **Selected forms** in the report by marking the corresponding radio button. If **Entire report** is selected, skip to the next step. Otherwise, the forms contained within the selected report are displayed below the file list. Double-click each form in this box to select or deselect it for inclusion in the new report. Select the forms or sections to merge in to this report or click the **Mark All** link to select all of the forms in the report.



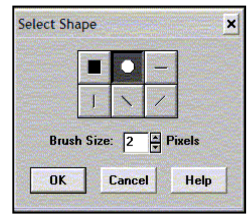
6. When all options are set, click the desired button at the top of the window to execute the process and return to the **Order** PowerView. Here's a brief description of what each button does:
   - **Merge forms AND data** – Merges the older report's forms or sections, as well as the data in them, into the current report. Any fields already completed in the order form are retained in the new merged report.
   - **Merge in forms only** – Click this button if all that is needed is the forms structure from the older report, but no data.
   - **Clone** – The **Clone** option makes an exact duplicate of the older report. Any information entered in the order form is overwritten with the data from the older report.

How do I Adda Marshall & Swift Page to an FHA Report?



In the Marshall & Swift Handbook:
1. Find the page to add to the report, and zoom in to 125%.
2. Click on the **Snapshot Tool**, and then create a rectangle around the area to add.
3. The follow message will appear: **"The selected area has been copied to the clipboard"**. Click on **OK**.

In the FloodMaps (ImagePals Image Editor) Program:
4. Create a new page in FloodMaps by clicking on **File | New…**
5. From the **Data Type** dropdown list select **Grayscale (8-bit)**, check **Current Clipboard**, and click **OK**.



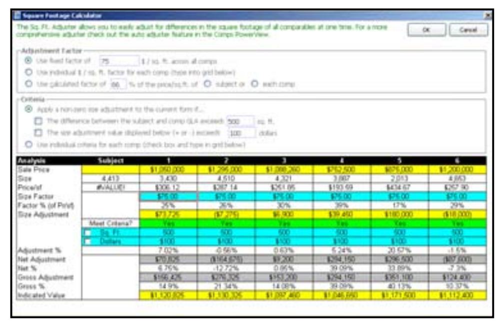
6. Click on **Edit | Paste | As Selection**.
7. Then click on **View | Actual View**.
8. Create a square around the data to highlight by clicking on **Line Tool** (third icon from bottom on the left), then on **Brush Shape** (first icon from top on the right) Type 2 for **Brush Size**, and click **OK**. Draw the square around the data.
9. After finishing editing, click on **Edit | Select | All**, and then click on **Edit | Copy**.

In the WinTotal Scan Page:

10. Add **[Scanned page] Addendum [Lgl]** from **Other Form & Addenda** as described in the **Adding Additional Pages** section.
11. Open the page, right click on the gray area, and select **Paste Photo**.

How do I use the Square Footage Adjustment Calculator in WinTotal?

The Square Footage Adjustment Calculator allows the appraiser to easily adjust for differences in the square footage of all comparables:



1. Ensure that the sales price and square footage for all comparables have been entered.
2. Select **Square Foot Adjuster…** from **Tools on the** menu bar.
3. The first section of the Square Footage Adjustment Calculator shows the methods available for calculating the adjustment. Their meaning is self-evident.
4. Choose the method and set the parameters that determine if the adjustment is relevant. The SF Adjuster shows the resultant net/gross percentage as it will appear on the form.
5. Click OK to merge the adjustment figures into the current report.

If for some reason the square footage of a comparable changes, rerun the SF Adjuster to recalculate the adjustments.

How do I recalculate the current form when the calculations are not right?

This problem usually manifests itself when cloning reports and adjustments are brought forward from the old report. To recalculate the report: click **Form** on the Toolbar and select **Recalculate Current Form**. This will cause the adjustments to be recalculated and should correct the amounts in the adjustment fields.

What can cause the IDC data (flood map and census info) to not be found and the location map to be incorrect?

Not all communities within a county have FEMA maps. If the Flood Map Info is missing, it probably does not exist.

When maps/data are incorrect, this is typically due to improperly formatted addresses in the sales comparables grid – especially in cases where the correct map was obtained a short while ago on a different report. It's not uncommon for people to want to use unit numbers or other information other than the city, state and zip in the second address line. However, this can confuse a system that implements geocoding to locate properties.

An easy way to determine if improperly formatted addresses are causing the problem is to use some known addresses in a new report.

Start with a blank URAR form and enter the following addresses.
Subject: 925 Crown Dr. Edmond, OK 73034
Comp #1: 1010 Crown Dr. Edmond, OK 73034
Comp #2: 1016 N. Blackwelder Edmond, OK 73034

Now, go to the *Maps PowerView,* and add a new map with these properties. Select the Internet mapping options, such as **Automatically place comparables on the map**.

If the map downloads and displays the annotations correctly, then we know the mapping module is "intact" and functioning properly. Check addresses in the report and verify there isn't anything other than the Address, City, State and Zip in those fields. It's possible that non-alphanumeric characters such as semi-colons (;) and slashes (/) could also be interfering with the download.

If addresses are entered correctly and there are still problems: Sometimes there are problems when the **subject address** can't be located. This can cause problems getting the map altogether and, since IDC looks at the subject section on the major form before collecting flood and census tract data, this could be the source of that problem as well. In this case, remove the Street Address, City and State when prompted for address confirmation – giving it only the ZIP code. This is a worst-case scenario, but at least it will get a map centered on the zip code where one can pan and zoom. If giving it only the subject ZIP doesn't work, try giving it the subject's city and state only instead. Since 75% of the addresses in the United States are contained in the mapping system, this situation should not arise frequently.

Verify that the subject address on the major form is entered correctly and is in the correct format. If an error is evident, correct it. If not, try the following instructions.

A good way to check the formatting of addresses entered on you're a form is to click **IDC Data** on the toolbar (again, only available at the office).

The *WinTOTAL Internet Data Connector* displays not only census tract and flood data, but also standardized address information.

The addresses entered in the report will be displayed, along with the correct standardized U.S. Postal Service address and ZIP code, if available. To have WinTOTAL automatically place the standardized address information into you're the report, click the **Insert** checkbox. Click **OK**, to return to the form.

My Location Map is not loading. What should I Do?

There may be instances where clearing the temporary Internet files is required. These might include problems with downloading maps, or EDI. In these instances, one of the first things to do is clear the temporary Internet files and then to retry the operation.

To clear the temporary Internet files from within Internet Explorer, do the following:
1. Open Internet Explorer.
2. On the menu bar, click **Tools** and select **Internet Options**.
3. Under the Temporary Internet Files section on the General tab, click **Delete Files.**
4. Click **OK** to close the Internet Options screen.

What is a Worksheet in WinTotal?

The Worksheet provides spreadsheet functions right inside the appraisal report. This allows the appraiser to set up a custom calculation form inside the report. The Worksheet works like spreadsheet from Microsoft Excel, and even reads spreadsheets saved from Microsoft Excel.

How do I remove the "□" character in WinTotal?

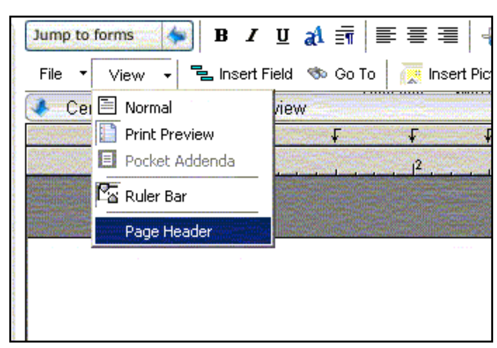
The squares found in a WinTotal comment comes from a Converted SFREP Report. Trying to delete the character looks like everything near it is being deleted instead of the square.

To delete the square character, highlight the letters on each side of the square, and hit **Delete**. Retype the two letters deleted.

Remember the following Warnings:

<u>**WARNING:**</u> Importing an SFREP report is not a "perfect science" and data may not be transferred to the new report as you may expect it to. Verify <u>**ALL**</u> information in the new report.

<u>**WARNING:**</u> Cloning a report is not a "perfect science" and data may not be transferred to the new report as you may expect it to. Verify <u>**ALL**</u> information in the new report.



How to I Access the signature portion of the Desk Review Certifications?

On the Desk Review form click on **View**, and then on P**age Header**. This will show the Header and Signature area of the Review Certification, and the header of any Supplemental Addendum.To go back to the Review Certification click again on **View**, and then **Page Header** to unselect it.

What need to be filled out on the Desk Review Certifications?

The effective date of this review, the signature date of original appraisal, and the effective date of original appraisal needs to be entered in the Desk Review Certification page.

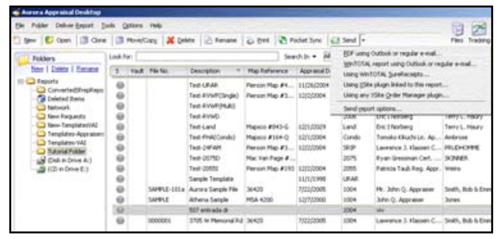
Effective Date of the Review (SR3-1(b)(ii)): <u>enter effective date of this review</u>

Date of the Work Under Review (SR3-1(b)(iv)): <u>enter signature date of original appraisal</u>

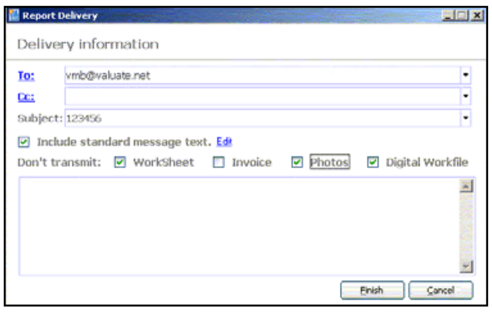
Effective Date of the Opinion in the Work Under Review (SR3-1(b)(iv): <u>enter effective date of original appraisal</u>

Appraisal Desktop and Order Form Issues

How do I Send Reports or Templates via e-mail?



When using Outlook:
1. Click on the report or template to send once so that it is highlighted
2. If this is the first time to send a report, click on the dropdown menu next to the **Send** button and select **WinTotal report using Outlook or regular e-mail…** Otherwise click on the **Send** button.



3. If the report has not been Digitally signed a message will pup-up. Click **Yes**.

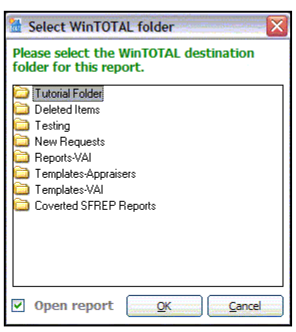
4. Fill in the **Delivery Information**. Be sure that **Photos** is check, and also check if the report has WorkSheets and Digital Workfiles that need to be sent. Click **Finish** to send.

When using Web Mail:
1. With the new message window open click on the Add Attachment icon.

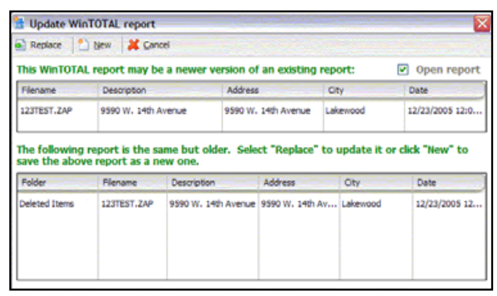
2. Click on **Browse** and go to C:\Win2000\Files, and open the folder in which the report (RPTS-VAI.FLD) or template (TMPL-VAI.FLD or TMPL-APP.FLD) is located.
3. Click on the desired report or template (with file extension "ZAP") to highlight it.
4. Finally, click **OK** to attach the file to email. Complete the email and send normally.

Note: Do not use the files ending in "BZ1", these are backups files and are **NOT** the most current copy of the report or template.

How to I Receive Reports or Templates via e-mail?



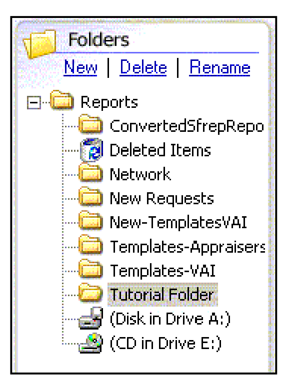
When using Outlook:
1. Open e-mail containing the report or template.
2. Double click on the attached file, and select **Open it**.
3. Click **Replace** if the report being received is the latest and the only one to be on the Network or Home pc. Otherwise click **New**. If the report is new to the Network or Home pc, this window won't show.



4. Select the folder where the report or template should go, and check to open the report or not. Click **Ok**.

When using Web Mail:
1. Open e-mail containing the report or template.
2. Right click on the attached report or template, and click on **Save as…**
3. Browse for C:\Win2000\Files, and open the folder in which the reports or template should go.
4. Finally, click on **Save**.

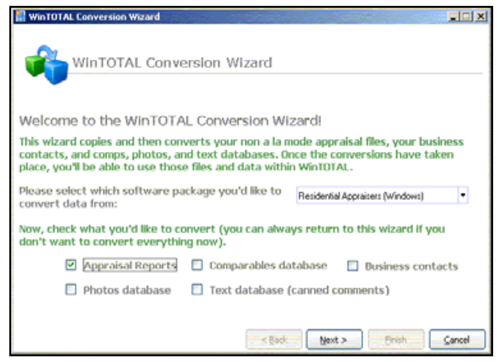
How do I copy Reports or Templates to a disk or memory card?



1. In the File Cabinet, highlight the report or template to be copied.
2. Click on the **Move/Copy** button.
3. Check **Copy**, and select the floppy disk, drive A:\, or other removable media.
4. Finally, click **OK**.

Then once the floppy/memory card is at its destination….
1. Click on the drive letter for the floppy or memory card.
2. Highlight the files to be moved to the local computer.
3. Click on the **Move/Copy** button.
4. Check **Move**, and select the folder to Copy the files to.
5. Finally, click **OK**.

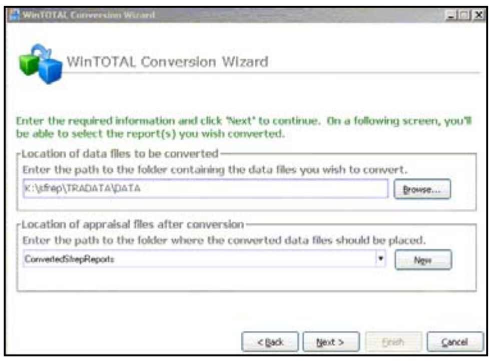
How do I Convert Files from SFREP to WinTotal?



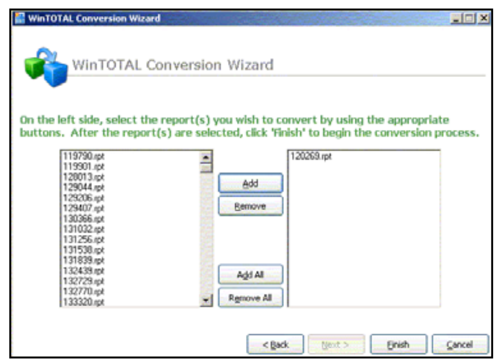
WARNING: Importing an SFREP report is not a "perfect science" and data may not be transferred to the new report as you may expect it to. Verify **ALL** information in the new report.

To begin the batch conversion process, do the following:

1. From within WinTotal, click **Tools**, and select **Convert competitor files...**. This will start the **Conversion Wizard**.
2. Select **Residential Appraisers (Window)** in the dropdown list. Then, select **Appraisal Reports**, and click **Next**.



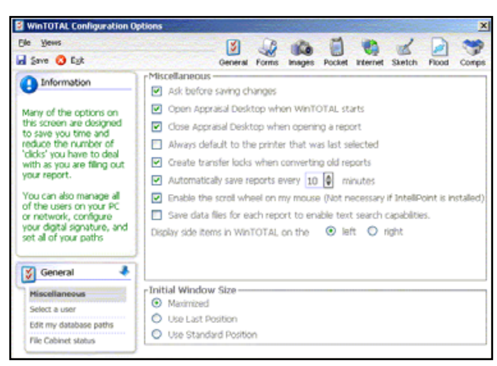
3. WinTotal normally finds the location of SFREP on the computer, and selects a location to save the newly converted reports. If these file locations need to be changed:
   - In the **Location of data files to be converted** field, enter the path to the current location of the report files, or click the **Browse** button to navigate to the appropriate folder. For Network computers the path is **K:\SFREP\TRADATA\DATA**, and for Home computers the path is **C:\SFREP\TRADATA\ DATA**.
   - In the **Location of data files after conversion** field, select **Converted SFREP Reports** from the dropdown list.
4. Once the appropriate information is entered, click **Next** to proceed. The information provided in this dialog explains the conversion and gives some additional information for what to do with the report files after conversion. After reading this, click **Next**.
5. WinTotal will then scan the specified directory for any reports created in SFREP and will display a list on the left of files that can be converted. Simply select the file(s) to convert, and click **Add**. The selected report(s) will then appear on the right-hand side of the dialog. **WARNING:** Do **NOT** click **Add all**, there are too many files and the system will lock up.
   - To select multiple non-contiguous files by holding down the **CTRL** key while clicking the file names.
   - Or, select a block of files by doing the following: Click the first one, then hold down the **SHIFT** key, and click the last one in the list to convert.



6. After all of the files to convert are selected, click the **Finish** button, and WinTotal will convert them automatically and place the new files in the folder specified as the **Location of data files after conversion**.
7. From here the converted report's data can be **Imported** into a template. This can be accomplish as follows:
   a. Create a new report as described in the **New Report Using Template** section.
   b. Import the data from the Converted SFREP report to the new WinTotal report as explained in the **Importing file Data in WinTotal** section.

Note:

- Text Addendum and Extended Comments are messy or don't transfer at all. Unfortunately, this text will need to be re-typed in a **Supplemental Addendum [Multi-page]** in WinTotal.
- Subject and Comparable Photos are transferred with their description. These descriptions will show on the screen but will not print.



How do I Change the settings so the Appraisal Desktop doesn't close when a report is open?

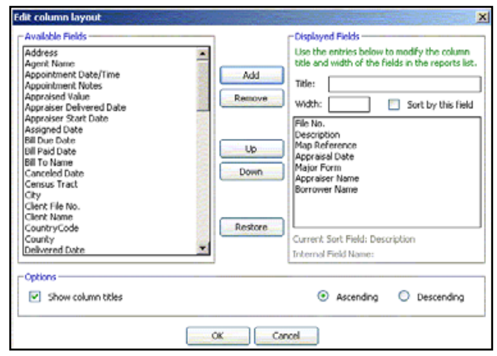
Click on **Options** on the bar menu, and select **Configure WinTotal Settings…** Click on the **General** icon, select **Miscellaneous**, and uncheck **Close Appraisal Desktop when opening a report**.

How do I recover a lost Report (For Home Appraisers)?

In the event a File corruption is encountered, here is one way to recover the data:

1. Click the folder in which the appraisal was located.
2. Click the **Tools** menu and choose **View Recoverable Files**.
3. There is two different types of files:
   - [OPEN] means there are "pieces" of the appraisal open. This will have your most recent changes.
   - [BACKUP] files are useful if the appraisal doesn't appear at all. The backup is a copy of the report from the last time it was saved.
4. Restore either the backup or piece together the [OPEN] file by moving your cursor over the file description and clicking with the right mouse button.
5. On the menu fly-over select **Recover**.

The recovered file will have "recovered" in the description, to go back to seeing the reports in the normal view, click "All Reports."



Can I Change the column layout on the Appraisal Desktop?

Click on **Edit Column Layout** under **Options**, then select the column name to add on the left side or to remove on the right side, and click on **Add** or **Remove**. Use the **Up** and **Down** buttons to organize the columns as desired. The columns also can be renamed by selecting one and typing a new name under **Title**.

When should I Rebuild the reports list?

Rebuilding the reports list is handy in the case where it appears as though a newly created file is missing from a folder, or in general files are missing from a folder. (It could be due to a database error or other unknown problem.) This will take few minutes, and it will rebuild all the folders. To use the "rebuild reports" function, simply click once on the desired folder's description, then select **Rebuild reports list** from the **Options** menu.

What does the “Report File Locked Open” error when opening a report and what should I do?

When the “Report file is locked open” message appears while opening a report indicates that at some time the report was closed abnormally. For instance, closed abruptly in a system crash.

Fortunately, this is an easy problem to correct. To close the report that is locked open, verify it is not opened by anyone else, then click on the **Override** option provided.

Caution: If on the network at the office, and more than one copy of the same report is opened, after the first person closes the report, any changes made since the last time they saved are lost by the second person. This is why it is important to make sure no one else has the report open when overriding.

How do I change a Report’s Description?

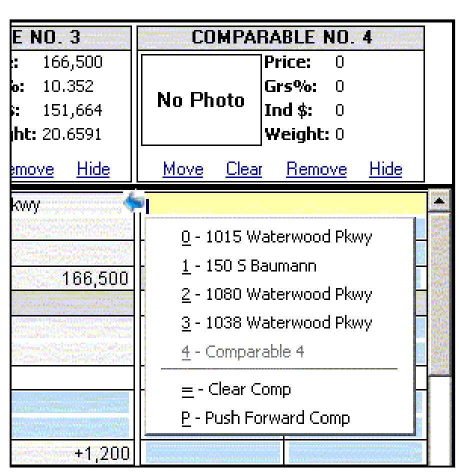
If the Randa # on the Description is not the right one, right click on the Report, click **Rename**, type the new name and click **Ok**. This will change the File Name if the mistake was also made on the File Number.

How do I change a Report’s File Number?

If the Randa # on the File Number is not the right one, open the Order PowerView (as describe before), and change Under **File Numbering** the **Randa #** under **Internal Order #**. This should also change the **Main File # on Form**. The File Number can also be changed on the Form, and will automatically make the changes on the Order Form. Additionally, **Lender Case #**, **Client File #**, or **FHA/VA Case #** can be changed in the same manner.

How do I change a Report’s File Name?

The **File Name** is the actual name of the report. Even if the **File name as order number is selected** there is a case in which WinTotal adds an extra number to the File Name of the Report. This occurs when WinTotal finds another Report with the same name, even if the reports are located on different folders, for example in **Deleted Items**.
To change this, first be sure that there are not other reports under the same name, and go to the **WinTotal Local Reports** or **WinTotal Network Reports** shortcut on the desktop, find the Report to change, right click on it, and select rename. Delete the extra number at the end.
WinTotal will have to be closed and reopened to access the renamed report. This procedure may not work on the network, so contact Tech Support for assistance.



Comps Issues

How do I use the side-by-side comps feature?

WinTotal has special keystrokes in all comps sections to eliminate repetitive data entry. From the side-by-side comps view in the **Comps** PowerView, additional comps beyond the first one can be quickly manipulated using related data from the subject and other comps.

- To copy the entire column for comp #1 to comp #2. Put the cursor at the beginning of the first line of comp #2's address field. Press the = key on the keyboard. A fly-over menu appears prompting for the comp to copy. From here, just type the number of the comp to copy or use "=" again to wipe out the whole column.
- The "=" function may also be used on individual line items. Put the cursor in the location item for comp #3 and then press "=" so that, this time when a number is chosen, it only copies that one item.
- To copy a description field (i.e. Neighborhood) across all of the comps fields, place the cursor on the subject cell that has the description to copy and press **F2**.

How do I Copy, swap and rearrange comps?

Rearranging, deleting, hiding, or resetting comps can be quickly done in the **Comps** PowerView. WinTotal even recommends a suggested value for the subject using an average of the comps to produce a probable value. To use this value, just click the value to the right of **Suggested** in the subject property's heading.

Here are some options that can be used from the links in the headings of each comp column or the links in the subject property's heading:

- Hide individual comps using the **Hide** links at the top of each comparable column or hide multiple comps using the **Show desired comps** link in the subject column.
- Dynamically rearrange the comps to place the best comps closest to the subject property by using the **Move best comps closest** link in the subject column.
- **Add a comparable** by using the corresponding link in the subject column.
- Delete a comparable using the **Remove** links in the comp column headings.
- **Clear** a comparable column using the corresponding link in a comp column heading.
- **Swap** a comparable with another by clicking the corresponding link in a comp column heading and then choosing a comparable to swap with.

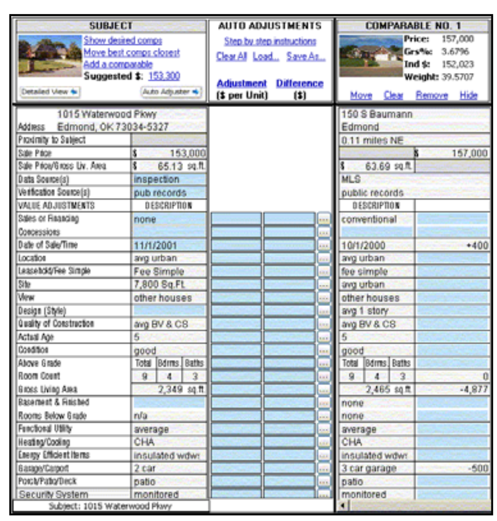
What is a Comps Detailed View?

WinTotal gives the option to add and view more detailed info about the comps. The **Detailed View** in WinTotal's **Comps** PowerView allows the adjustments to be tuned based on the components that comprise a value in the field.

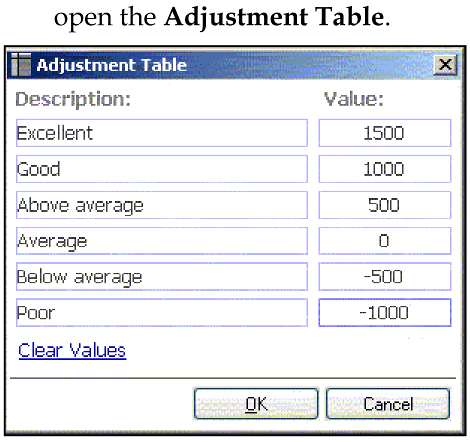
To use WinTotal's **Detailed View** while the Comps grid is being filled out, just click the **Detailed View** button in the section at the top of the **Subject** property.

How do I create automatic adjustments?

To create a set of automatic adjustments:



1. Click the **Auto Adjuster** button at the top of the **Subject Property**. The screen expands to show data entry fields.
2. In the **Adjustment** column, enter a specific value to apply to any comparable that differs from the subject property. Note that this is only applied in those cases where both the subject and the comp have a numeric value entered in the field, such as the Gross Living Area. The amount entered is multiplied by the difference between the subject and the comp and the appropriate adjustment is entered for the comp.
3. In the **Difference** column, enter the threshold number to ensure that adjustments below a certain value are not entered. For example, if the smallest desired adjustment is $200, enter this amount. Now, if the calculated adjustment is below $200, no adjustment is made.
4. The final column contains the option to make adjustments based on text fields. Click the button corresponding to a particular property feature to open the **Adjustment Table**.



In the left column, enter the descriptions of the feature to use in the comp. In the column on the right, enter a value to apply to any comp that differs from the subject. For example, if in the **Condition** field is normally used "Excellent," "Average" or "Poor," enter these values in the left column (leave the additional fields blank). Next, if a $1,000 adjustment is normally made if the subject was rated excellent and the comp "Average," put "1000" in the **Value** column to the right of "Average." Likewise, if the adjustment for a "Poor" house was $1000, enter "-1000" in the **Value** field to the right of "Poor." Once the **Adjustment Table** is completed, click **OK** to save it.

5. After creating all of the adjustments, click the **Save As** link at the top of the **Auto Adjustments** column. Enter a name for this set of assumptions and then choose whether it should be available to only you or to everyone using this copy of WinTOTAL. Click **OK** to save the assumptions.
6. In the future, when a subject is being appraised in this same area, click the **Load** link at the top of the column. Choose the desired assumptions set from the list and click **OK**. All comps in the report are automatically adjusted based on the assumptions.

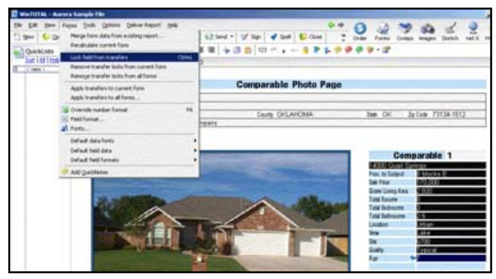
Note: The Auto Adjustment assumptions are saved as part of the report. When an old report is cloned, or merged by using the SmartMerge feature, <u>the Auto Adjustments are carried forward.</u>

Photo Issues

How do I delete "Price, Age, etc." from the Photo Addenda?

<u>NOTE:</u> This procedure has been completed on all VAI templates. These instructions are provided if additional photo pages not contained in the templates are needed.

For the information on the Subject Photo or Comparable Photos not to appear in the report, follow these steps:

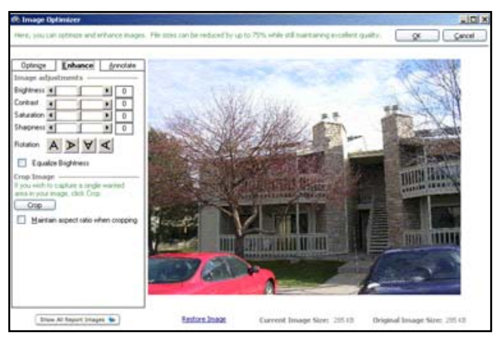


1. Open the report and go to the desired Photo Addenda.
2. Highlight the fields in the Photo Addenda page that contains the words to be deleted.
3. Click on **Form** on the Main Menu bar, and then on **Lock Field from Transfers**.
4. Then without un-highlighting the field press Ctrl+K.
5. Now, highlight the definition of each field and press Ctrl+K again.
6. Repeat steps 3-5 for each field to be erased.

How do I remove photos from a photo sheet?

1. Click on **Images.**
2. Under **Image Pages** select the photo page that contains the photo to be removed.
3. Right click on it, and select **Remove**.
4. Click back to **Forms** to see the changes.

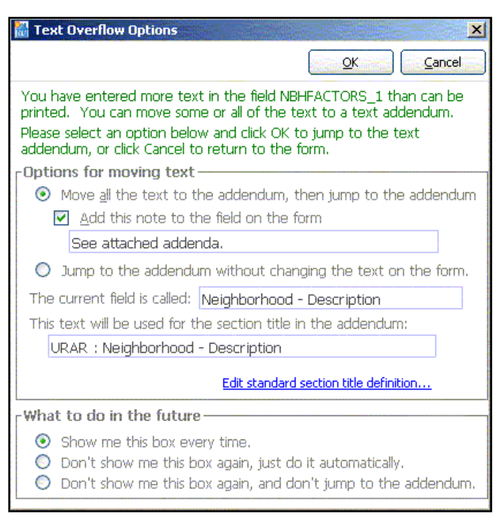
How do I clean up/enhance and photo?



These steps will enhance the copy of an image that is placed in an appraisal report.
1. Right click on the photo to enhance.
2. Select **Optimize/Enhance photo…** by clicking on it.
3. Select the Optimize tab on the WinTotal Photo Optimizer to set image size, color and detail. Select the Enhance tab to make image adjustments or crop the photo. As the changes are made, WinTotal has a live preview to show what the image will look like. To return the image to its original settings, simply click Restore.
4. Once the image looks right, click **Finished** to save the changes and close the window.

Formatting and Auto Transfer Issues

How is text that doesn't fit in a comment field handled by WinTotal?



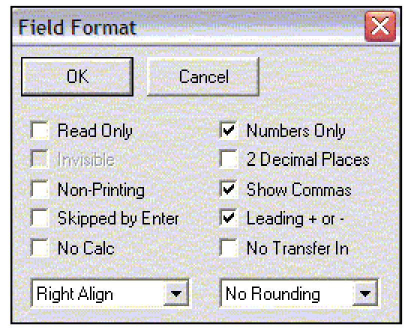
When more information than can be fit in a comment field is entered, WinTotal automatically switches to the Addenda PowerView. Here's an example:

1. Go to the Site section of the URAR and type a few sentences into the comments section, enough to fill the field and cause the Text Overflow Options Dialog to appear.
2. Leave the **Move all the text Addendum, then jump to the addendum** selection.
3. A comment such as "See attached addenda." can be inserted in the current field, replacing the text that was moved to the addenda.
4. Each field is also given a heading in the addenda. This gives extended comments a more professional look and adds to its readability.

5. Now, click **OK**. At that point, the screen will split so the switching between the form and the addendum is easy.

- The automatic headings that are created keep track of which field the block of text is tied to, so when it jumps back to the form, it will remember where it was.
- To switch back to editing the appraisal form in full screen mode, click the Form PowerView.
- Certain forms in WinTotal also use the same word processing engine as the Addenda PowerView, and can be viewed with full screen editing when accessed through the forms list.

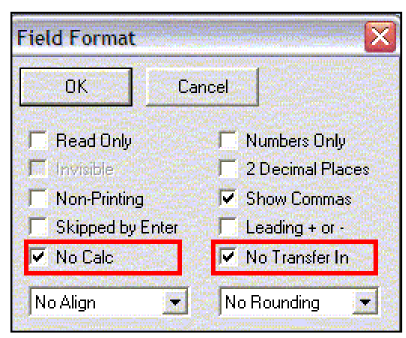
What formatting and auto transfer options are available in WinTotal?



Access the Formatting option by right clicking on the field to modify, and select Field Format… This form gives several options for formatting the cell:

- **Read Only** – When checked, the field is locked and not editable.
- **Non-Printing** - When checked, data entered in the field is not printed.
- **Skipped by Enter** - When checked, the field will be skipped when an arrow key is pressed.
- **No Calc** – When checked, calculations on the selected field are not allowed.
- **Number Only** - When checked, characters are not allowed in the field.
- **2 Decimal Places** – When checked, only two places after the decimal point are displayed (8.50 instead of 8.5). Works only if the **Number Only** field is checked.
- **Show Commas** – When checked, a comma is inserted in the date (2,001 instead of 2001). Uncheck this option to remove the comma.
- **Leading + or –** - When checked, a "+" or "–" will appear in front of the number (+35 instead of 35). Works automatically if the **Number Only** field is checked.
- **No transfer in** - When checked, enables previously entered information to be automatically inserted throughout the document. If the entered data is being overwritten, just uncheck this box.
- **Select Alignment** - Select the alignment of the field: no align (left alignment), left align, right align, or center align.
- **Select Rounding** - Select the Rounding of the field: no rounding, rounding to 10 (1,930 instead of 1,934), rounding to 100 (1,900 instead of 1,934), or rounding to 1000 (2,000 instead of 1,934). Works only if the **Number Only** field is checked.

Data is not transferring to a cloned report correctly, what can I do?

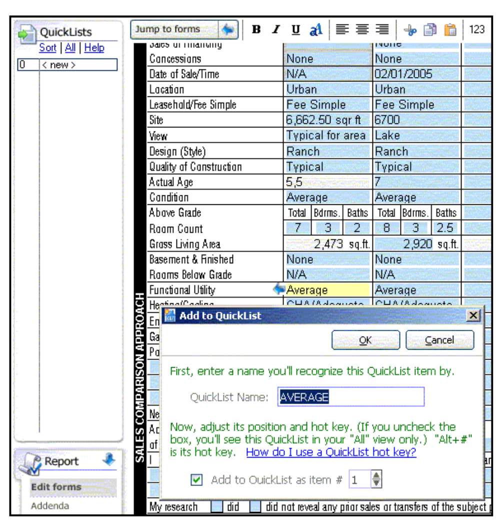


If data is not transferring to a cloned report properly, try changing the field format settings in the Template or Original report as follows:

1. Right click on the field, and select **Field Format**
2. Make sure the **No Transfer In** option is checked
3. Click **Ok** to save
4. If the cloning still doesn't work properly, try checking the **No Calc** option in addition to the **No Transfer In** option

Common Response Issues

How do I create Common Responses for a single field?

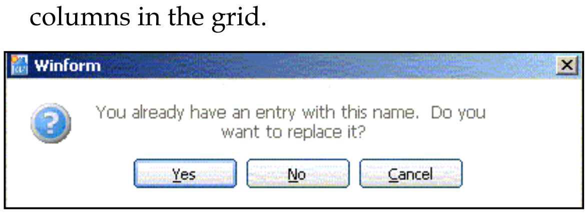


Common Responses are created by first typing the information on the form, and then saving the text into a database:

1. Go to the field where the common response is to be created and type the response to use(i.e."Average").
2. Double-click **<new>** in the QuickList panel to show the keyname for this new comment, which can be changed to some meaningful label. This is just the keyname, not the actual comment itself. Then, click **OK**.

"Average" will now appear in the quick list for that field (if the **QuickList** pane on the left is not there, press **F9**). The top nine common responses are assigned a hot key, ALT+1 to ALT+9. Use a hot key, or double-click the individual comments to insert them.

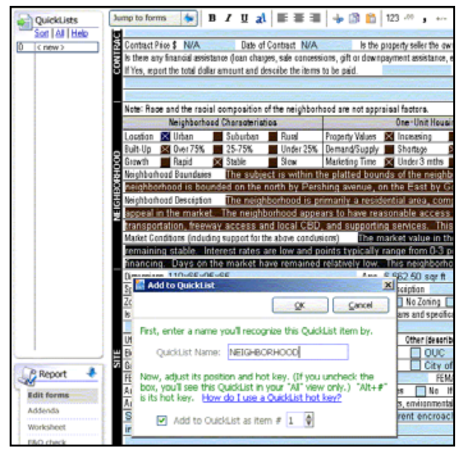
A Common response saved in the comp grid for the **Subject** or any **Comparable** will be automatically added to all columns in the grid.



Note:
If, at the moment of creating a common response, the message "**You already have an entry with this name. Do you want to replace it?**" appears, remember - **Common response names are unique to a report. Overwriting an entry will change that common response throughout the report.**

How do I create multi-field Common Responses for an entire section?

Enter the information for a common response in a group of contiguous fields. A good example is the Neighborhood section of the URAR.

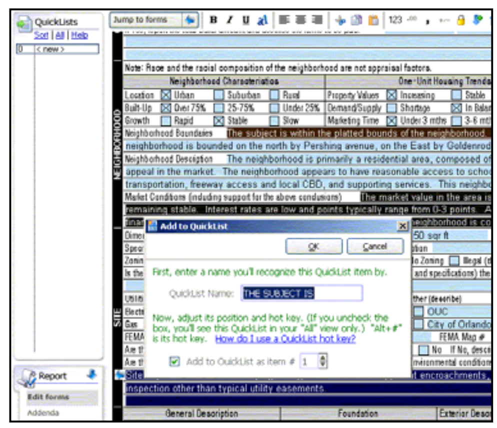


1. Click in the section's last field, i.e. the comments for **Market Conditions**.
2. Hold down the SHIFT key, and click the first field in the block, the checkbox for "location."
3. Now, all of the fields should be highlighted. Release the SHIFT key. (This same result may be obtained by clicking and dragging the cursor through all the fields to save.)
4. Double-click **<new>** in the QuickList panel and enter an appropriate keyname, such as the name of the neighborhood, and click **OK**.

Now, when the first checkbox of the neighborhood section is selected, the name of the neighborhood appears in the QuickList. The top nine common responses are assigned a hot key, ALT+1 to AL +9. Use a hot key, or double-click the individual comments to insert them.

How do I create multi-field Common Responses for non-contiguous fields?

Enter the information for a common response in a group of non-contiguous fields:



1. Click the first field to add, i.e. the comments for **Neighborhood Boundaries**. This is the field where the common response is going to appear.
2. Hold down the **CTRL** key, and click each of the individual fields to add to the QuickList comment. I.e. the comments for **Market Conditions**, and **Adverse Site Conditions**.
3. Now, all of the fields should be highlighted. Release the **CTRL** key.
4. Double-click **<new>** in the QuickList panel and enter an appropriate keyname, and click **OK**.

Now, when the cursor is on the first field of the QuickList entry, the keyname of the comments appears in the QuickList. The top nine common responses are assigned a hot key, ALT+1 to AL +9. Use a hot key, or double-click the individual comments to insert them.

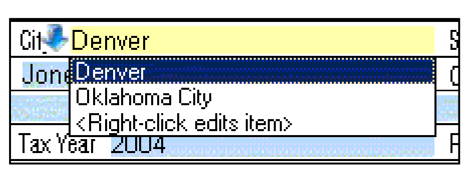
How do I copy Common Responses from one field to another?

Common responses from one field can be copied to another. This is achieved by doing the following:

1. Go to the field containing the common response to be copied and click on it once. Find the name of the response to copy in the QuickList located on the left side on the screen. Note the common response name. This name will be needed later on.
2. Go to the field where the common response is to be copied and click on it once.
3. Click on the **All** link on the left side of the screen, locate the response name to copy, and right click on it.
4. Finally, select **Add to QuickList…** to save the common response to the current field.

Does WinTotal remember text I've typed in a field?

In addition to Text Databasing and QuickLists, WinTotal also remembers the last ten items typed into a particular field.



1. Type something into any field, and then click on a different field.
2. Now go back to the original field, notice the arrow on the left.
3. Click on the arrow and it will show the last entry. Also, press ALT plus the down arrow key to access the list.
4. Right-click the drop-down list, and an option to remove the entry, edit it, add it to the QuickList, or use it in the given field is provided.

How do I copy Common Responses to my home computer?

Coordinate this with Viviana B.

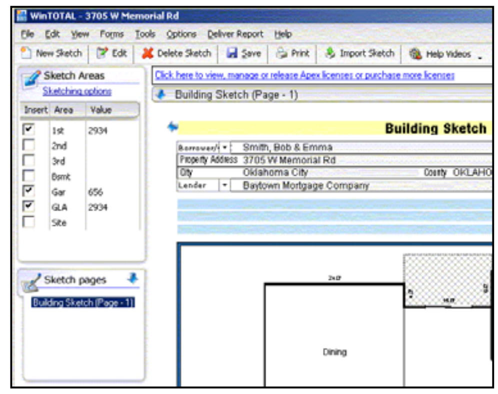
Integrating a Sketch into WinTotal – Using Apex

How to get started

With the WinTotal report open, click on the **Sketch** icon to open sketch page.

Starting a sketch from the WinTotal Sketch page

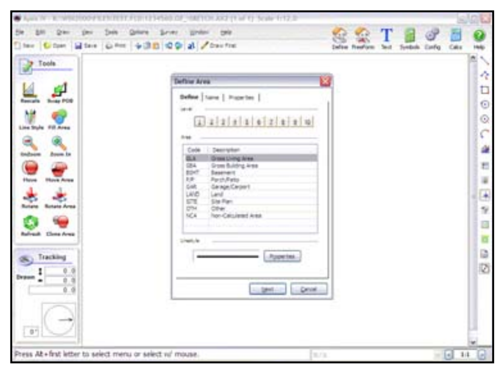
Creating new sketch:
- Click **New** in the menu bar.
- Pop-up message will be opened asking to select the type of sketch page. Select **Building Sketch** (most of the time). Select other appropriate page if necessary.



Retrieving an old sketch saved in WinTotal (to be modified):
- Click **Import Sketch** in the menu bar.
- Pop-up message will be opened showing folder(s) and report.
- Select file name to retrieve the sketch from.
- The sketch will appear on the screen, and click **Edit** in the menu bar.
- The sketch will be opened with Apex (sketch software).

Editing an existing sketch:
- When there is a sketch existing in the file, it will be automatically shown.
- Click **Edit** in the menu bar.
- The sketch will be opened in Apex.

Basics of how to create Sketch in Apex



To begin a drawing:
- Define area following pop-up message.
- Double click or "enter" cursor on a page, start drawing using number & direction keys like Sketch-It. To place exterior lines hit "enter" twice - "enter" once will place the line and the second time will place the figure.
- For interior and other non-exterior wall lines – click "free form" icon.
- For placing text or symbols – click "Text" or "Symbols" icon. Unmark the box "close dialog after selection" at the bottom of text/symbol entry. That will stop the text/symbol entry box from closing each time the text is selected.

Useful function keys:
- Anytime a sketch is drawn, a "c" will place the sketch at the center of the page/view.
- "a" works as "auto close" (like "force close" function for Sketch-It).
- There are many other convenient function keys in Apex. Please check the manual & video library noted below.

Useful functions:
- To edit text and symbols, click and find the "hot spot" – a small blue triangle.
- Edit one (or more) exterior lines by left clicking, then right clicking on the "hot spot", then select "reopen at line…"
- Click "config(uration)" icon to set up your own preferences
- Architectural plans with feet & inches can be redrawn easily. For example, drawing 5' 4", enter "5 tab-key 4 →". It creates a line of 5.3' to the right.
- To flip the sketch, go to "view" then "flip".
- There are many other convenient functions in Apex. Please check the manual & video library noted below.

Drawing a 45° angle:
- Type the length of the line and then use one of the following keys depending on the desired direction:
  - **Page Up**: right-up
  - **Page Down**: right-down
  - **Home**: left-up
  - **End**: left-down
- Also, this can be achieved as "length" + "**r**"(for right) or "**l**"(for left) + "**45**"(degrees)

Saving Sketches

Sketches cannot be saved in Apex but only within the WinTotal report. Close Apex sketch by clicking the red "*X*" on the right top corner. The message asks you to "save sketch file" to the report. Click **Yes**. The sketch will be saved and the system will return to the WinTotal sketch page.

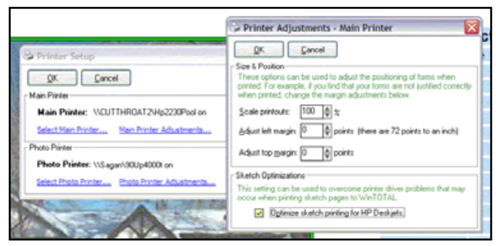
Apex FAQs

How can I copy a Sketch to Word (For Commercial Reports)?

1. Open the report with the Sketch form that needs to be copied.
2. Right click on the Sketch, and click on **Copy**.
3. Then, open Word and place the cursor where the Sketch should be copied.
4. Right click on Word, and click on **Paste**.

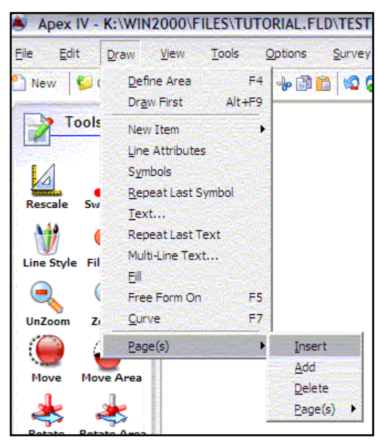
How do I resolve Sketch printing issues, such as when trying to print a sketch all of the icons have lines leading to the corner of the page?

When trying to print a sketch and all of the icons have lines leading to the corner of the page usually occurs when printing the sketch on an HP DeskJet, and it is easily corrected:



1. In WinTotal, click **File** and select **Print Setup…**. The Print Forms dialog will display.
2. Click the **Main Printer Adjustments…** button. The Printer Adjustments – Main Printer dialog will display. (If the Photo printer is used to print sketches, click the **Photo Printer Adjustments…** button instead.)
3. Place a check in the box by **Optimize sketch printing for HP Deskjets**. (Note: This should only be checked when print driver errors are encountered.)
4. Click **OK**, and then click **OK** again to close the two dialogs. The sketch should now print correctly.

How do I add multiple sketch pages to a report?



1. Open the report in need of an additional sketch page.
2. Click **Sketch**. This will open the Sketch PowerView, and the previously completed sketch should be displayed.
3. Click **Edit**. (The Edit button is located on the left just above the sketch.) This will open the Apex IV Windows interface.
4. Click **Draw**, and scroll to **Page(s)**. An additional drop-down menu will appear.
   - To add a sketch page that will come before the previously completed sketch page, click **Insert**.
   - To add a sketch page that will come after the previously completed sketch page, click **Add**.
   - To delete the sketch page shown on the screen, click **Delete**.
   - To scroll among sketch pages, click **Page(s)** to see a list of current sketch pages. Highlight the one to view, and it will appear on screen.

How do I resolve errors on Sketch Area Calculation Summary?

There are two known errors that can occur in the Area Calculation Summary:

- **Open**: This means that the area still open. The best way to solve it is to go to Apex and do Ctrl + F6, and Apex will find the open spot on the area.

- **Invalid**: This means that there is something in the sketch that doesn't allow the area to be calculated. Like an extra tiny line. The best way is to find the extra line by clicking on **Area Line Properties…** under Edit. This will show the distance of each single line, including the extra one. Reopen the area on this line and close re-close the area properly.

Manuals and video/audio instructions

When Apex is open, go to "Help" (<u>not</u> the Help icon with the "?" mark), and find "online manual" and "video library":

- "Online manual" opens up the 50-page manual in PDF format. It can be printed or simply accessed as needed.
- "Video library" currently has 3 topics (Apex introduction, basic drawing concepts, & version 3???Aren't we on Version IV/// – new features) under "available videos". First two topics should be viewed prior to using Apex. The last one is long and not detailed but describes interesting functions.

Form Summary

1004C - VAI-1004C

Cover Page [Digital/Large Photo w/Line border]	Other Forms & Addenda
Manufactured Home [Form 1004C][03/05]	Residential Forms & Addenda
[Digital/Medium] Subject Photos [Minimal]	Digital Photo Pages, Residential
[Digital/Medium] Extra Subject Photos	
[Digital/Medium] Comparable Photos [Minimal]	Digital Photo Pages, Residential
[Digital/Manual] Site Map	Map Pages
[Digital/Manual] Flood Map	Map Pages

2055 - VAI-2055

Cover Page [Digital/Large Photo w/Line border]	Other Forms & Addenda
Exterior-Only [Form 2055][03/05]	Residential Forms & Addenda
[Digital/Medium] Subject Photos [Minimal]	Digital Photo Pages, Residential
[Digital/Medium] Comparable Photos [Minimal]	Digital Photo Pages, Residential
[Digital/Manual] Flood Map	Map Pages
[Digital/Manual] Site Map	Map Pages

2075D - VAI-2075D

Cover Page [Digital/Large Photo w/Line border]	Other Forms & Addenda
Desktop Property Inspection 2075	Residential Forms & Addenda
[Digital/Medium] Subject Photos [Minimal]	Digital Photo Pages, Residential
[Digital/Manual] Site Map	Map Pages

2-4FAM - VAI-24FAM

Cover Page [Digital/Large Photo w/Line border]	Other Forms & Addenda
Small Income [Form 1025][03/05]	FHA\HUD Forms & Addenda
[Digital/Medium] Subject Photos [Minimal]	Digital Photo Pages, Residential
[Digital/Medium] Extra Subject Photos	
[Digital/Medium] Rental Photos 1-3	Digital Photo Pages, Residential
[Digital/Medium] Comparable Photos [Minimal]	Digital Photo Pages, Residential
[Digital/Manual] Site Map	Map Pages
[Digital/Manual] Flood Map	Map Pages

CondoD - VAI-Condo-D

Cover Page [Digital/Large Photo w/Line border]	Other Forms & Addenda
Exterior-Only Condo [Form 1075][03/05]	Residential Forms & Addenda
Supplemental Addendum [Multi-page]	Most Common Forms & Addenda
[Digital/Medium] Subject Photos [Minimal]	Digital Photo Pages, Residential
[Digital/Medium] Comparable Photos [Minimal]	Digital Photo Pages, Residential
[Digital/Manual] Flood Map	Map Pages

CondoI - VAI-Condo-I

Cover Page [Digital/Large Photo w/Line border]	Other Forms & Addenda
Condo [Form 1073][03/05]	Residential Forms & Addenda
Supplemental Addendum [Multi-page]	Most Common Forms & Addenda
[Digital/Medium] Subject Photos [Minimal]	Digital Photo Pages, Residential
[Digital/Medium] Extra Subject Photos	
[Digital/Medium] Comparable Photos [Minimal]	Digital Photo Pages, Residential
[Digital/Manual] Flood Map	Map Pages

FHA (Condo) - VAI-FHA (Condo)

Cover Page [Digital/Large Photo w/Line border]	Other Forms & Addenda
Condo [Form 1073][03/05]	Residential Forms & Addenda
Supplemental Addendum [Multi-page]	Most Common Forms & Addenda
[Digital/Medium] Subject Photos [Minimal]	Digital Photo Pages, Residential
[Digital/Medium] Extra Subject Photos	
[Digital/Medium] Comparable Photos [Minimal]	Digital Photo Pages, Residential
[Digital/Manual] Flood Map	Map Pages
Comprehensive Valuation Conditions [HUD-92564-VC 07/2003]	FHA\HUD Forms & Addenda
Notice to the Homebuyer [HUD-92564-HS 07/2003]	FHA\HUD Forms & Addenda
Notice to the Homebuyer [Supr. Sig.] [HUD-92564-HS 07/2003]	FHA\HUD Forms & Addenda

FHA (URAR) – VAI-FHA (URAR)

Cover Page [Digital/Large Photo w/Line border]	Other Forms & Addenda
URAR [Form 1004][03/05]	Residential Forms & Addenda
[Digital/Medium] Subject Photos [Minimal]	Digital Photo Pages, Residential
[Digital/Medium] Extra Subject Photos	
[Digital/Medium] Comparable Photos [Minimal]	Digital Photo Pages, Residential
[Digital/Manual] Site Map	Map Pages
[Digital/Manual] Flood Map	Map Pages
Comprehensive Valuation Conditions [HUD-92564-VC 07/2003]	FHA\HUD Forms & Addenda
Notice to the Homebuyer [HUD-92564-HS 07/2003]	FHA\HUD Forms & Addenda
Notice to the Homebuyer [Supr. Sig.] [HUD-92564-HS 07/2003]	FHA\HUD Forms & Addenda

Final - VAI-Final

Cover Page [Digital/Large Photo w/Line border]	Other Forms & Addenda
Appraisal Update/Completion Report [Form 1004D][Major Form][03/05]	Residential Forms & Addenda
[Digital/Medium] Subject Photos [Minimal]	Digital Photo Pages, Residential

RVWD - VAI-RVWD

Review Short Form - 2006	Review Forms & Addenda
Certification: The Desk Review - Supplemental Addendum w/sig block [Multi-page]	Most Common Forms & Addenda

RVWF(Multi-Family) – VAI-RVWF(Multi-Family)

Cover Page [Digital/Large Photo w/Line border]	Other Forms & Addenda
Two-to Four-Unit Field Review [Form 2000A][03/05]	New Fannie Mae Forms[03/05]
[Digital/Medium] Subject Photos [Minimal]	Digital Photo Pages, Residential
[Digital/Medium] Comparable Photos [Minimal]	Digital Photo Pages, Residential

RVWF(Single Family) – VAI-RVWF(Single Family)

Cover Page [Digital/Large Photo w/Line border]	Other Forms & Addenda
One-Unit Field Review [Form 2000][03/05]	Review Forms & Addenda
[Digital/Medium] Subject Photos [Minimal]	Digital Photo Pages, Residential
[Digital/Medium] Comparable Photos [Minimal]	Digital Photo Pages, Residential

URAR - VAI-URAR

Cover Page [Digital/Large Photo w/Line border]	Other Forms & Addenda
URAR [Form 1004][03/05]	Residential Forms & Addenda
[Digital/Medium] Subject Photos [Minimal]	Digital Photo Pages, Residential
[Digital/Medium] Extra Subject Photos	
[Digital/Medium] Comparable Photos [Minimal]	Digital Photo Pages, Residential
[Digital/Manual] Site Map	Map Pages
[Digital/Manual] Flood Map	Map Pages

Other Forms

Additional Comparables	Most Common Forms & Addenda
Supplemental Addendum [Multi-page]	Most Common Forms & Addenda
[Digital/Manual] Location Map	Map Pages
[Scanned page] Addendum [Lgl]	Other Forms & Addenda
Comparable Rent Schedule (FNMA1007) Single Family Comparable Rent Schedule [Y2K][Lgl]	Residential Forms & Addenda
Operating Income Statement (FNMA216) Operating Income Statement [FNMA 8/88 Rev. 01/04]	Income Forms & Addenda
Appraisal Report-Residential Income Property 71B [Rev. 8/77]	Income Forms & Addenda
Final Appraisal Update/Completion Report [Form 1004D] [Major Form][03/05] Appraisal Update/Completion Report [Form 1004D] [03/05]	Other Forms & Addenda

WinTotal Shortcuts and Hotkeys

Key	Global
F1	Opens the context sensitive, searchable help system.
ALT + F4	Closes WinTotal.
CTRL+ C	Copy either the field or selected text to the clipboard.
CTRL+ N	Start a new report.
CTRL+ O	Open the File Cabinet.
CTRL+ P	Print the currently open report.
CTRL+ S	Save the currently open report.
CTRL+ T	Jump straight to the Contents PowerView.
CTRL+ V	Past clipboard contents into selected field at cursor.
CTRL+ X	Cut either the field or selected text to the clipboard.

Key	Forms PowerView and QuickLists
F9	Show or hide Text Database and QuickList bar.
CTRL + F9	Create Text Database entry from currently highlighted field (or fields). QuickList # must be specified.
CTRL + Q	Use Text Database comment associated with keyname typed in current field.
ALT + 1, ALT + 2, etc.	Use the QuickList item for the current field.
ALT + Down Arrow	Display recently typed entries for the current field.

Key	Forms PowerView and Comps PowerView
F2	Copies the description field across the comps.
=0, =1, =3, etc.	Copies data from the comparable number specified. When used in the first line for the address, it copies the entire comparable.
==	When used in the top line of a comparable, clears all data and calculations for the comparable.

Key	Forms PowerView
F6	Override the "numbers only" format in the current field. Press ENTER to move to the next field after using F6.
F7	Spell check entire report.
F10	Define cursor movements within individual fields of a report. Can be used in the entire form or any section of the form.
F11	Toggles the “Contact” and “Same as” icons on and off.
ALT + C	Opens the “Contents” window to select form.
ALT + I	Opens the net.X Wizard to retrieve maps.
ALT + G	Sign or remove signature from current file
ALT + S	Spell check currently selected field.

Key	Forms PowerView
CTRL + B	Bolds the highlighted text.
CTRL + D	Insert current date into selected field.
CTRL + I	Italicizes the highlighted text.
CTRL + K	Completely erases a field.
CTRL + L	Lock field from transfer.
CTRL + M	Open the Math Calculator window.
CTRL + U	Underlines the highlighted text.
CTRL + W	Zoom the width of the form to fit your screen.
CTRL + F4	Closes the current report.
CTRL + HOME / END	Jump to the first / last field of the current form.
CTRL + Page Up/Pg Dn	Jump to the previous/next form listed in the Contents of the open report.
CTRL + CLICK	Select multiple non-consecutive fields. Hold down the CTRL key while clicking field.
SHIFT + CLICK	Select multiple consecutive reports. Click the first field, hold down the SHIFT key, and click the last field.
SHIFT + Delete	Clear entire Form.
SHIFT + ENTER	Move curser back one field on the form.
SHIFT + TAB	Moves the curser one field to the left on the form.
SPACE	(Works in checkboxes only.) Pressing the Space bar in a checkbox field toggles the checkbox between clear and filled (checked).
TAB	Moves the curser one field to the right on the form.

Key	File Cabinet
ALT + D	Delete the currently selected file.
ALT + F, then 1, 2, 3, etc.	Opens the most recent reports open. Use any number from 1-9 to open the corresponding report.
ALT + Y	Move/Copy.
CTRL + F	Opens the Advance Find to search for a report.
CTRL + CLICK	Select multiple non-consecutive reports. Simply hold down the CTRL key while clicking individual reports.
SHIFT + CLICK	Select multiple consecutive reports. Simply click the first file, hold down the SHIFT key, and click the last file in the list.
DEL	Deletes the currently selected file.

Key	Contents PowerView
F3	Search for a particular form. Pressing F3 again will skip to the next instance of the form in the forms list.