TOTAL 2011 by a la mode | QuickStart Guide

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The leader in real estate technology

TOTAL 2011 QuickStart Guide

Welcome to TOTAL 2011 Standard

TOTAL 2011 is the 6th generation of a la mode's appraisal software – the software used for more appraisals than all others combined. This guide gives you an overview of TOTAL 2011's features from start to finish.

Installing TOTAL 2011

You can install TOTAL 2011 by downloading the installation file from our website, or by inserting the installation CD if you have one. When you start the installation, a Wizard guides you through the installation process. After you accept the terms of the license agreement, you are asked whether this will be a **Stand-alone installation** or a **Network server installation**. If you intend to use TOTAL 2011 on this computer alone, choose the Stand-alone installation. If this computer will act as the server on a network installation of TOTAL 2011, choose Network server installation. When you've made your selection, click **Next** and you will be prompted for the Destination Folder for the TOTAL 2011 installation. The default location is best for most users, so unless you know otherwise, click **Next** to continue. The Wizard then informs you that it is ready to install TOTAL 2011, which you can do by clicking **Install.** The installation is completed, and by default you are automatically prompted to download any available updates. This is recommended, and requires an active internet connection. The updates can be quite large, so a broadband internet connection is best. After the updates are installed, you are ready to start TOTAL 2011.

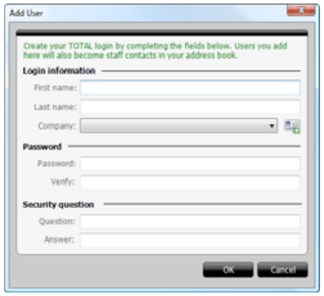
Starting TOTAL 2011

The first time you start TOTAL 2011 you will be asked to register the program. Simply enter your customer ID, a computer name of your choice, and the activation code. Your customer ID and activation code should be on an email you received shortly after purchasing TOTAL 2011.

First Time: Creating TOTAL 2011 Users

After TOTAL 2011 starts, you're prompted to setup a user so that TOTAL 2011 can keep track of your user-specific settings like your contact information, license information, and identity verification.

1. Since we need to add you as a user, click **Add**. Enter your information in the dialog that appears.



- To the right of the **Company** drop-down box, click the **Add Contact** icon to enter your company information. This way, TOTAL 2011 can simplify formfilling later by including the information for you.
- For your **Password**, enter any characters that you like, *but be sure it is a password you will remember*. Your password protects your signature, identity verification, and makes sure no one else accesses and changes your settings.
- In the **Security Question** section, enter a **Question** and an **Answer** . If you forget your password, you can reset it after entering this answer.

2. Now you're returned to the **Select or Create TOTAL User** window, where, in the list you'll see the user that you just created.

- Check **Remember my password** if you want TOTAL 2011 to remember your password every time you start up.
- Check **Sign me in automatically** if you want to bypass the **Select or Create TOTAL User** window entirely when starting TOTAL 2011.

3. When you've made your selections, click **OK**.

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Now, the TOTAL 2011 Appraisal Desktop opens.

Appraisal Desktop Overview

When you start TOTAL 2011, you'll see the Appraisal Desktop. This is where you manage your report files, contacts, and control settings for TOTAL 2011.

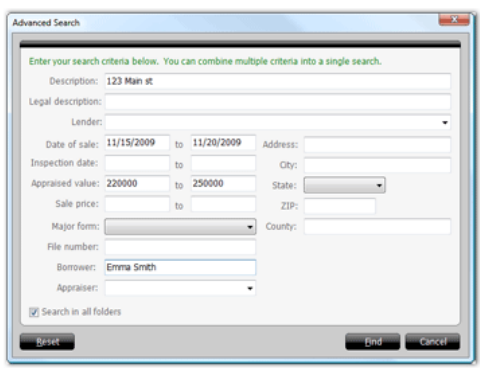
The menu at the top contains items that let you manage files and folders, access settings, and get help. Importantly, this is also where you determine whether to view the File Manager or the Contacts.

Some of the functions of the menus are duplicated with shortcut keys. To see a list of shortcut keys, view and print the Shortcut Guide.

The functions of this menu are important, so take a further look in the File Management section of the TOTAL 2011 User's Guide.

Some of the File Manager functions you may find useful:

- Right-clicking on any folder will reveal a context menu with actions that can be taken with that folder. Learn more about these in the TOTAL 2011 User's Guide.
- **Look for** – the File Manager gives you powerful ways to search for your reports. You can simply type a search term in the **Look For** box, and press **Enter**.
- For a detailed search, click the **Advanced** button. Here you can search in detail for terms in your report, including sale and inspection date ranges and appraised value range.



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Other tools:

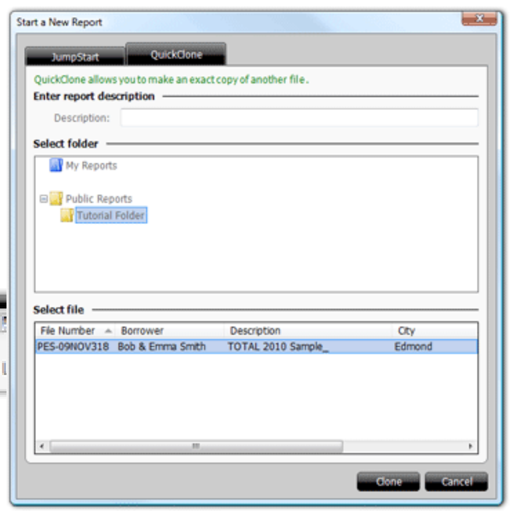
- Clicking a column heading in File Manager will sort by that column, ascending. Clicking that heading again will re-sort, descending.
- Right-clicking a report in the list reveals a context menu useful for report management as well as setting column options.
- To create a new folder, click **Folder, New.**

As you can tell, the File Manager is extremely powerful and there's much more to it than we're covering here. See File Management in the TOTAL 2011 User's Guide for more details.

Contacts

Click the **Contacts** button on the menu and TOTAL 2011 will display a list of your contacts, as well as all the tools you'll need for managing them.

There are several ways to manage what contacts appear in the list. It's important to know that there are two types of contacts: **Individuals** and **Companies.**



Some Contacts functions you may find useful:

- **View** – This drop-down box selects which type of contact is displayed in the list. If you select **All**, the contact list will group Individual contacts that are part of the same Company. Click the **+ sign** to the left of the Company to view the Individuals in that company.
- **Look for** – searches any field within contacts for the term you typed. After typing your search criteria, press **Enter** or click the **Magnifying Glass** icon to execute the search.
- Click any letter of the alphabet to display only contacts with a last name starting with that letter. This applies to the contacts currently displayed in the list.
- Click any column heading to sort the listed contacts by that column. Click the heading again to reverse the sorting order.

As you might expect, there's more to know about managing contacts than is discussed here. Visit the Contact Management section of the TOTAL 2011 User's Guide for more information.

Create a New Report

Click **File Manager** on the menu bar, and you will again see the list of report files. Likely, the list is empty because you don't have any reports in the folder called **My Folder**.

TOTAL 2011 comes standard with a sample report that will help you understand the formfilling functions of TOTAL 2011 without entering all of your own data. Let's start by merging the data from the sample report into a brand new report.

Create a new report by merging an old report:

1. Click **File** on the menu, and choose **New.**

   Now, the **Start a New Report** dialog opens. This window is where you can start a new report from scratch using the **JumpStart** tab, or clone another report using the **QuickClone** tab, as we're going to do now.

2. In the **Description** field, enter any description you would like to use for this report.
3. If necessary, click the **+ sign** next to **Public Reports** in order to select the **Tutorial Folder.** Then you should see the sample report listed in the **Select File** section below.
4. Select the sample report from the list, and click the **Clone** button.

Now, TOTAL 2011 creates a new report, and merges in all the forms and data from the sample report. When the process is complete, you'll see the report.

For users of WinTOTAL Aurora or Athena, you may notice the lack of several "PowerViews." Since we simplified the PowerViews to **Forms** and **Sketch**, you don't need to leave the formfilling experience to manage comps, maps, and images. All of these functions are now "inline" letting you concentrate on authoring your report.

Be default, you'll be in the **Forms PowerView**, so let's take a look at the features of this view.

The Forms PowerView

The Forms PowerView is where you create your report. It has tools that will help you quickly and accurately enter the data of your appraisal:

Menu

You will notice that the menu in the Forms PowerView is similar to the one in the Appraisal Desktop, but adds tools that help with formfilling.

Tool bar

Just beneath the menu bar you'll see the tool bar. The tool bar contains all the tools you need to add forms and maps, write addenda, spell check, correct errors and omissions, sign, and deliver your report.

Since the Forms Powerview is where you author your report, there are several features you'll want to know about, but are not covered in this guide. The Formfilling section of the TOTAL 2011 User's Guide will give you complete details to speed and simplify report creation.

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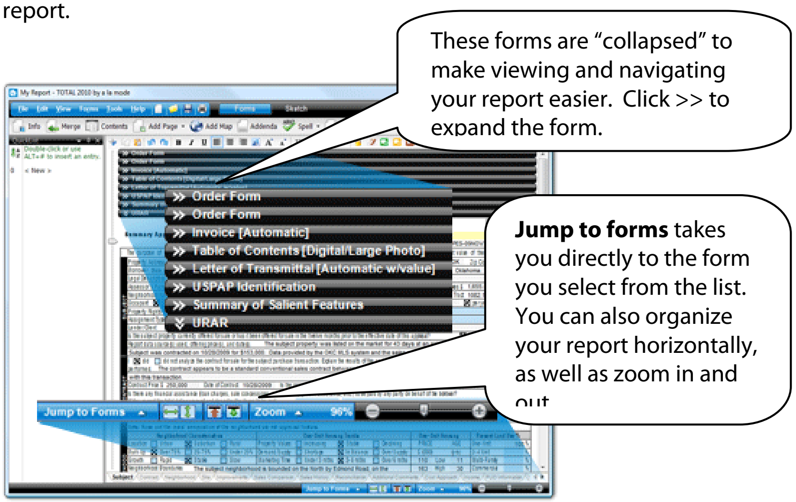
Navigating Your Report

TOTAL 2011 gives you many flexible ways of viewing and navigating your report.

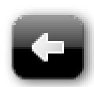


Working In Your Report

Add/Remove a Form

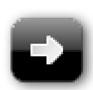
Remove a form from the report:

- Click the **Contents** button on the tool bar and the **Add or Remove Forms** window appears.
- In the list of forms in the report in the right column, scroll to the bottom, select the **SureDocs Verify** form.
- Click the **Left Arrow** that appears between the two columns. This removes the form from the current report.

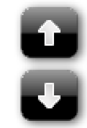


Now, add a form into the report:

- Select any form from the **Available forms** on the left.
- Click the **Right Arrow** that appears between the two columns. This adds the selected form to the report.



- Since the new form is added at the end of the current report, you'll likely want to move it to a different location. You can drag and drop the form where you want it in the report, or use the **Up/Down Arrows** that appear between the two columns.

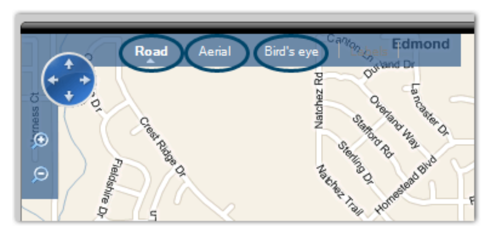


- Click **Save & Close** to save changes and close the window.

Add a Map

Mapping in functions in TOTAL 2011 are more complete than ever. By integrating with Microsoft Bing™ maps, you can include **Bird's Eye View**, **Aerial**, and of course **Road** maps**:**

- Click **Add Map** on the tool bar. This opens the **Map Options** window. While there are many options here, the default settings will do for now.
- Click **OK** and the **Map Wizard** opens, displaying each address to be mapped. Click **Next** to continue.
- After downloading your maps, the Map Wizard adds your properties, and displays the map for you – complete with balloons that annotate each property.
- To move a balloon, simply drag it where you want – or double click any balloon to edit its contents. Each balloon indicates the confidence with which the address was geocoded, as well as providing a link to compare to Google or MapQuest maps.
- Select the type of map using the Bing controls in the upper left. You can also use the Bing controls to zoom and pan.



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For a complete reference, see the **[Mapping]** section of the TOTAL 2011 User's Guide.

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- Click **Next** to move on to the **Retrieve Driving Directions** step of the wizard.
- Click the **Get Directions** box in the lower left of the window. Since the wizard needs to know where the directions should start, it prompts you to enter your office address. Go ahead and do so, then click **OK** and notice that the Map Wizard has now retrieved driving directions from your office to each property on the map.
- Click **Finish**, and the map is added to your report.

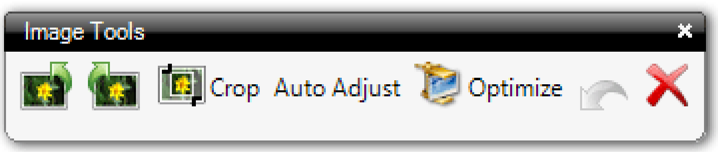
That's it! Using this simple wizard, you can provide professional mapping in your reports.

Working with Photos

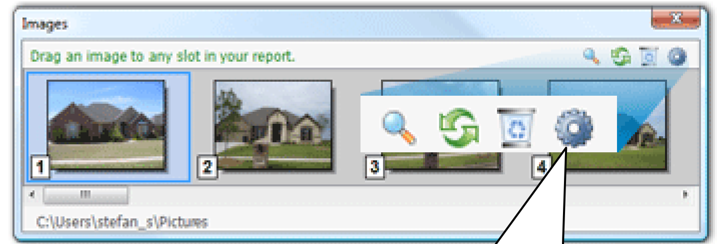
As technology advances, so do the expectations for images in appraisal reports. TOTAL 2011 keeps you ahead of the game by offering a complete tool-set for image management. See it all in the Image Management section of the TOTAL 2011 User's Guide. Here are some of the basics:

Add a photo:

1. Use what you've already learned to navigate to the **Subject Photos** page in the report.
2. Click on any of the photos on that page. Immediately, you'll see the **Image Tools**.



3. Press **F8** to display the **Images Strip.**



The Image Strip is a quick way to view available images, and then drop them into the image holders on your photo pages. Notice the menu in the upper right: hover over each icon to find out what they do

Click the **Configure Path** icon to get images from anywhere on your PC– including your network, camera, or

4. Drag a photo from the Images Strip onto any existing image on the page, and that photo is immediately replaced. If you want to, use the Image Tools to rotate, crop, adjust, and optimize the image.

It's that simple. But of course there are many more details to the ways you can manage images. Again, the TOTAL 2011 User's Guide Image Management section has the answers.

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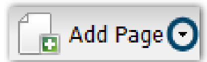
Add a PDF to Your Report

Adding a PDF to your report is simple:

1. Click the **Add Page** drop-down arrow on the toolbar, and choose **From PDF**.



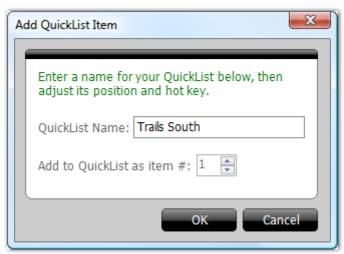
2. Specify what type of form the PDF should appear on, then type a title for that form.
3. Click the **Browse** button to find the PDF on your PC. Once you've selected the file, click **Open.** TOTAL 2011 adds the page containing your PDF to the report. **It could not be easier.**

Quicklists

QuickLists shave a lot of time off your report by letting you avoid re-typing commonly used data.

Create a QuickList Entry

1. Find any field in your report where you might commonly enter the same text, for instance: **Neighborhood Name**.
2. Select the field, and press **ALT + 0**. This displays the **Add QuickList Item** dialog.
3. Start creating the QuickList item by giving it a name.
4. When you choose a number from the **Add to QuickList as item #** field, that means that when you're ready to use this QuickList item, you press **ALT + (the number you chose.)**



5. Click **OK**, and you'll notice that the QuickList item now appears in the **QuickList Pane** on the left side of the Forms PowerView – giving you quick reference to the QuickList items available for use.

Side-by-side

Side-by-side gives you the flexibility to manage all of your comps, listings, and rentals.

Add

Adding a property is as simple as clicking the **Add an empty property** button at the top of an existing property.

Copy

Use the **Make a copy of this property** button to make a duplicate of an existing property in the adjacent slot.

Remove

To remove a property, click the **Delete this property** button.

Arrange

Click the **Move property left/right one slot** buttons to rearrange your existing properties. Or simply click and drag the property to the desired position.

Add Image

Use **F8** on your keyboard to access the image strip. To add an image to a property **Click and drag** images from the image strip to the property.

Sketching

You can create complex sketches using TOTAL 2011 with the help of **DaVinci**, a la mode's complete sketching solution which is integrated into TOTAL 2011.

Start a Sketch

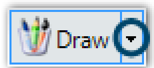
To begin sketching, click the **Sketch** button on the menu to enter the **Sketch PowerView**.

This brings you to a grid where you can begin sketching the property. Area calculations from your sketch transfer seamlessly into TOTAL 2011, and the sketch itself will appear on the sketch page in your report.

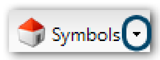
Create a Sketch

Since there's already a sketch in the sample report, let's add another.

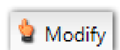
1. Click the **New Page** tab in the lower left corner of the sketch window.
2. Click the **Draw drop-down arrow** on the tool bar, and choose **Rectangle**.



3. Now, click on the grid and drag in either direction. You'll see a rectangle appear along with dimension labels. Let go of the mouse button when you want to stop drawing the rectangle.
4. Now, you're prompted to select what type of area this is, and how its dimensions should calculate into your report. You can play with these settings, but let's leave the defaults for now. Click **OK.**
5. Now, click the **Symbols drop-down arrow** on the tool bar. Here you'll find a complete library of commonly used sketch symbols. Just pick a few and put them in your sketch.



6. Now, click **Modify** button on the tool bar, and select some of the items in the sketch. You'll see that you can label, move, rotate, and shrink them quite easily with this tool.



7. Now that you have a simple sketch, go back to the **Forms PowerView**, and notice that the calculations from your sketch are now included in the dimensions for your subject property.

It's powerfully simple. There's no additional software to buy, and no "third party" to contact for support – it's all in TOTAL 2011, all made by a la mode.

Find out about the complete set of tools available for sketching in the TOTAL 2011 User's Guide in the **Sketching** section.

Sign your Reports

There are 2 different ways to sign a report in TOTAL 2011: **Non-securely with my graphical signature** or **Securely with SureDocs.** Here are the main differences:

- Signing **Non-Securely** simply applies a signature image to the appropriate fields, and anyone with free software available on the internet could compromise the security of that signature. There's no way to be sure that the content of your report is your original content.
- Signing **Securely with SureDocs** is the answer to report security: Your identity is verified, your signature is assigned a unique serial number, and salient data from the report is uploaded to secure a la mode servers. This means that anyone viewing the report can verify who signed the report and know for certain that the report data is the original data.

Since signing Securely with SureDocs is the best method, let's do this now.

First Time Setup:

The first time you sign **Securely with SureDocs**, there is a quick setup that verifies your identity, making sure your signature is *your* signature:

1. Click **Sign** on the tool bar. Since you have not yet set up a license or signature, you are prompted to do so. Click **Yes**.
2. In the **Add or Edit an Appraisal License** window, enter your license information.
3. Click the **Add Signature** button to the right, and browse to your digital signature image file. If you don't have one, you'll need to create one to proceed.
4. Once you've selected your signature image file, click **OK** to proceed. TOTAL 2011 prompts you for your a la mode login information to proceed. This is so you can begin the identity verification process.
5. After a brief check, you are notified that your identity has not been verified. That's OK, we'll do it now. Click **Yes.**

6. The **Verify Identity Wizard** opens and begins to walk you through the verification process. Read the message carefully, click **I Agree** to proceed.

- If you do not agree, you can still sign your reports using the non-secure process.

7. The next step of the wizard asks some personal questions. We understand this can be uncomfortable, so we've encrypted the information using SSL, and we will not retain the information. It is used solely for the purpose of searching for your credit bureau file. Complete all of the fields and click **Next**.

8. After your information is retrieved, you are presented with a list of questions that we obtained from Equifax. Your correct answers to these questions will prove you "are who you say you are" and verify your identity. Click **Next** when you have answered the questions.

9. If your answers match the credit file, your identity is successfully verified, and you can now click **Close.** If not, you will have one more chance to answer the questions correctly, after which you will need to use the manual identity verification process.

That's all of the first-time setup. **You won't have to do this again.**

Sign the Report

1. Now you are presented with a window that lets you determine which forms will be included in your printed report. For our "QuickStart" purposes, let's leave the default values. As always, check the TOTAL 2011 User's Guide in the Sign Reports section for more information.

2. Click **Sign** at the bottom to begin the **Signing Ceremony**. Read the message, and when ready click **Agree.** After a few moments, you'll see **Report was successfully signed with SureDocs.** Click **OK.**

The report is now signed.

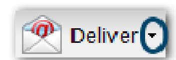
Now, take a look at the **Signature History** panel that has appeared on the left side of the Forms PowerView and notice that it lists the signer, and the date as stored on a la mode servers. Also, the **SureDocs Verify** form has been added to the end of your report, giving any reader the information necessary to verify the validity of your report.

Now, since the report is signed let's deliver it.

Deliver the Report

Report delivery is easier than ever before in TOTAL 2011. XSite Order Manager gives you the power to deliver using plug-ins that integrate with all the major appraisal delivery systems. However, for now, let's deliver the report as a PDF via e-mail.

1. Click the drop-down arrow on the **Deliver** button, and select **PDF report via e-mail**.



2. You are prompted to enter your a la mode login. When you've done so, click **OK**.

3. The **TOTAL Print Engine** window appears, allowing you to choose which pages will be included in the PDF. You can also change the settings for the PDF here. After you have made your selections, click **Print.**

4. Next, a new email message is created using your default e-mail program, and the PDF for the report is automatically attached. Enter the e-mail address for the recipient(s) and customize the subject line if you like. After typing any message in the body, send the message as you would any other.

The report is delivered using the default email program on your computer.

While you will learn more about delivery using plug-ins in the **Report Delivery** section of the TOTAL 2011 User's Guide, you can already see that delivering your reports will be the quick, simple part of the appraisal process it should be.

Thanks!

Thank you for taking the time to get acquainted with TOTAL 2011. As you get to know the software better, and it becomes a trusted part of your business, there are a few resources that you will likely find useful:

TOTAL 2011 User's Guide: http://help.alamode.com/appraiser/TOTAL

TOTAL 2011 Shortcut guide:
http://help.alamode.com/appraiser/TOTAL/shortcuts.pdf

TOTAL 2011 Networking Guide:
http://help.alamode.com/appraiser/TOTAL/TOTALNetworkingGuide.pdf

TOTAL 2011 videos – Quick videos that will show you the ropes with step-by-step instructions – http://help.alamode.com/videos/appraiser/total2011/