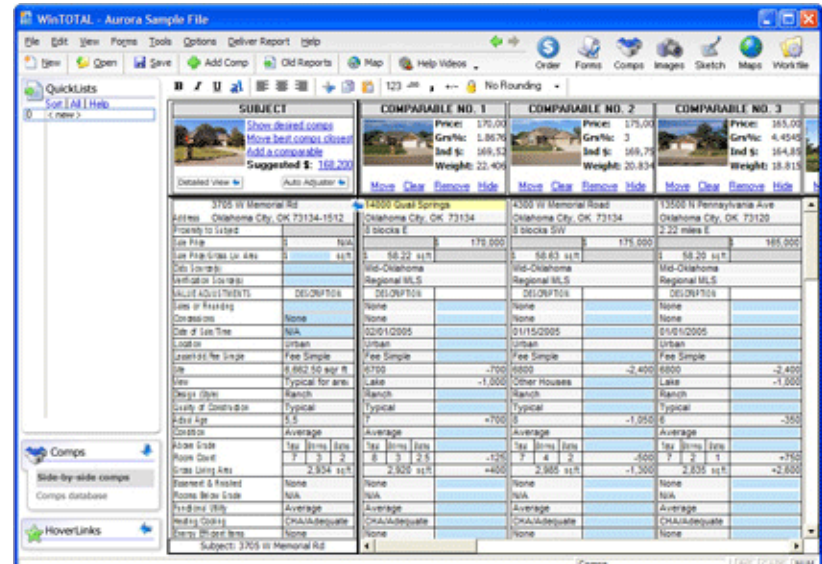


Comps PowerView

Comps PowerView

The Comps PowerView is designed to turn one of your most valuable assets – your comps – into a powerful business tool. The expanded Comps Database allows you to quickly find and place the best comps for your report, while the side-by-side view allows you to quickly apply standard adjustments across all of them at once. Coupled with the new MLS import tools, these new features can easily save you countless hours, and help you generate more business in the process.

WinTOTAL's side-by-side comps view gives you the flexibility to manage all of your comps at once. Since you're not constrained to form layouts for your comp work, you can easily make adjustments to all of your comps, copy data back and forth from comps, and rearrange comps without the usual copy and paste process that forms require. To get to WinTOTAL's side-by-side comps view, just click **Comps** in the main toolbar.



From this view, you can:

Define and apply automatic adjustments

Rearrange your comps

Add, remove, or import comps

Reuse comp data from other comp columns

And more...

Add Comps

WinTOTAL provides several ways to assist you in adding comps into your reports. There are three ways you can add comps into you report.

- **Manual Data Entry** – In the [side-by-side comps view](#), just click the **Add a Comparable** link at the top of the **Subject** column to insert another comp column.

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- **Old Reports** – To import a comp from an old report, click **Old Reports** in the toolbar of the [side-by-side comps view](#). Then, browse to a folder in your File Cabinet, click a report and double-click mark each of the comps you want to import from a previous report. Finally, click **Import** to pull in all the data about the marked comps.
- **The Comps Database** – Your Comps Database is your desktop resource for electronic comp data. When used appropriately, you can virtually eliminate the need for MLS printouts. Just click [Comps Database](#) in the **Comps** pane on the left, mark the comps you want to use in your report, and click [Place](#) to add them.

Remove Comps

If you need to remove a comp from your report, you can do so in the [side-by-side comps view](#) in two different ways depending on your needs.

- **Clearing the Column** – If the comp data in a column does not apply to your current report, just click **Clear** at the top of the comp's column and verify that you want to clear the column. WinTOTAL flushes out all of the data from that column, including the comp photo.
- **Removing the Comp** – If you originally placed the comp in the report with the intention of using it in the current report, but have since decided that the comp won't suit your needs, click **Remove** instead of **Clear**. When you click **Remove**, WinTOTAL prompts you to add the comp to your workfile as a means of complying with USPAP. Just click **Yes** to save the comp to your workfile or click **No** to simply flush it out of your report.



Hint: If you choose to add the removed comp to your workfile, you can find it in your workfile later, click it, and click **Restore** to add it back into your report.

Arrange Comps

Whether you need to add a comp, clear one out, or just rearrange them, WinTOTAL provides all the tools you need to manage your comps from the [side-by-side comps](#) view.

Moving Comps

As you continue to work on your report, you may decide that you need to rearrange the order of comps in your report, hide a few comps from view so that you can make that comp flush with the subject, or pull hidden comps back into view. There are several ways you can reorganize your comps:

- **Swapping Comps** – If you need to swap the order of two comps in your report, click the **Move** link in the top of either comp column. Then, choose **Swap With** and select the comp column where you want to move the current comp.
- **Manually Reordering Comps** – If you need to fully reorder your comps, click the **Move** link at the top of any comp column and then choose **Reorder Comps**. In the screen that appears, use the up and down arrows to reorder the comps list to fit your needs. Then, click **OK** to apply your changes.

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- **Automatically Reordering Comps** – If you need to order your comps by their similarity to the subject property, click **Move Best Comps Closest** at the top of the **Subject** column. WinTOTAL evaluates the adjustments you've made to your comps and reorders them so that those with the smallest adjustment percentage are closest to the subject.
- **Hiding Comps** – If you're comfortable with the order of comps in your report, but you want to hide some of the comps from the side-by-side view so that you can place certain comps flush with each, click Hide at the top of each comp you want to hide from view. The comps disappear from view but remain in your report. This can help you organize your comps so that they're flush with the subject to make adjustments easier but without reordering the comps in your report.
- **Restoring Hidden Comps** – If you've hidden some of your comps from view so that you can align other comps to ease the adjustment process, you may need to restore them to view at some point. To do so, just click **Show Desired Comps** in the **Subject** column and either click **Show All** OR click **Show Specific**, mark the comps you want to see, and click **OK**.

Map Comps

If you want to evaluate your comps based off their proximity to the subject property, you can place the comps in your report onto a location map for reference. To do so...

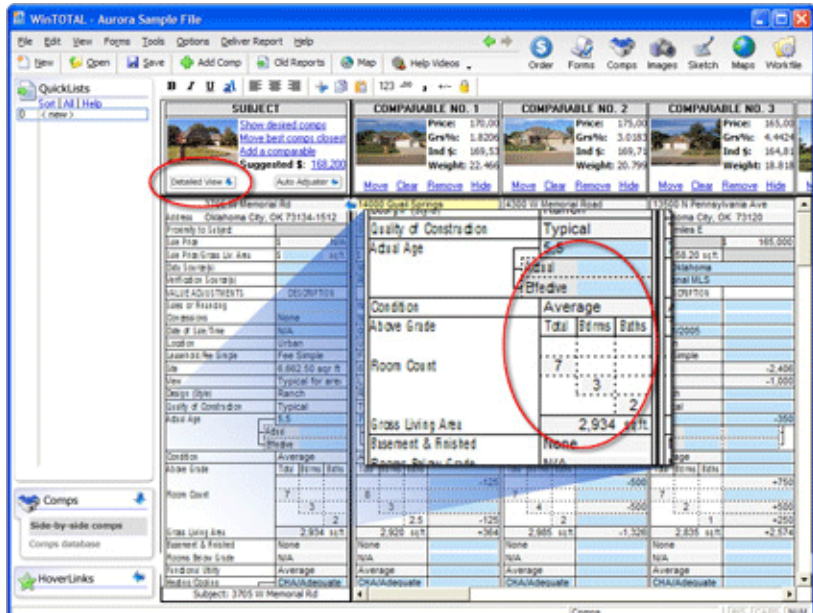
1. From the [side-by-side comps view](#), click **Map** in the toolbar.

2. In the **Maps Wizard**, confirm the property addresses and click **Next**.
3. Modify your map as desired using the **Annotate** tools in the **Location Map Options** pane.
4. Click **Finish** when you're done referencing the map.
5. Finally, you're prompted to add the reference map to your report's digital workfile for safekeeping. Click **Yes** to add it to your workfile or click **No** to simply close the Map Wizard.

Comps Detailed View

On top of the standard comparable information, you can now store additional data about every comp. This data, such as separate fields for garage and carport, or porch, patio and deck, is included with the comp and can be used to make automatic adjustments. However, the data is aggregated and inserted into the proper field on the form's grid. To use the comps detailed view, click **Detailed View** at top of **Subject** column in the [side-by-side comps view](#) to expand the grid in the report and enter additional data.

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- Press the equals key (=) at the beginning of the address field for any comp to copy the data for the entire column from another comp or subject column. For instance, pressing =0 from the address field copies the entire subject column into the current comp column. This can help you shave formfilling time off of the life of your report when you're dealing with a very similar property.
- Press the equal key twice (==) to clear the current field.
- Press **F2** in the description field of any comp to copy the contents of that field forward across all higher numbered comps.
- Clicking the **Suggested** value listed at the top of the subject column inserts a weighted average of your comps into the field for the indicated value based off the sales comparison.

Fill Out Comp Columns

When you're editing comps in the [side-by-side comps](#) view, you may often need to pull data from another comp column into the field where you're currently working. WinTOTAL acknowledges this fact by providing a number of shortcuts you can use to copy data to and from other columns. To use WinTOTAL's comp-specific formfilling tools...

- Press the equals key (=) at the beginning of any field to copy information from the corresponding field in any other comp, or the subject. For instance, if your cursor is in the **Location** field, pressing =0 copies the contents of the **Location** field in the subject to the **Location** field in the current comp. Pressing =1 copies the contents of the first comp, =2 the second comp, and so on.



Note: WinTOTAL determines its suggested value for sales comparison based off of a weighted average of your comps.

In addition to these comp-specific formfilling tools, keep in mind that you can use both [QuickLists](#) and comp data from your [Comps Database](#) to save even more time when filling out the grid.

Automatically Adjust

In the past, WinTOTAL included the ability to make standard adjustments across all comps based on square footage. While the [Square Foot Adjuster](#) is still alive and well in the **Tools** menu, the newest version allows you to make adjustments across ALL comps in the report based on just about any field. In addition, you can build sets of

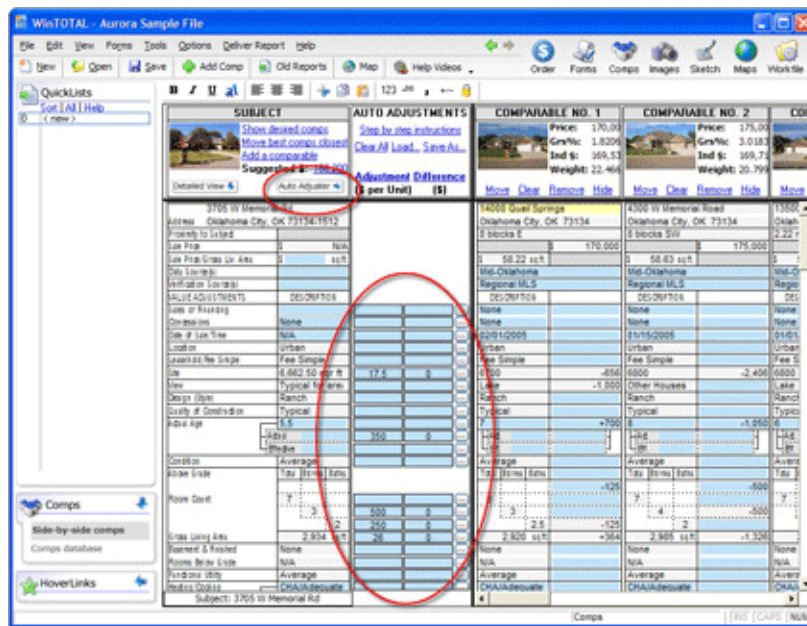
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assumptions and adjustments, then save and load them at will.

Defining Adjustment Rules

To create a set of automatic adjustments...

1. From the [side-by-side comps view](#), click **Auto Adjuster** at the top of the **Subject** column.



2. In the Auto Adjustment fly-out column, you can define adjustments for either text-based responses OR numeric responses. Depending on whether the column's data is text or numbers, the process differs.
 - o **For Numeric Fields** – Enter a per-unit adjustment value into the Adjustment column. For instance, if you wanted to make a flat adjustment of \$15 per

square foot of difference for the GLA, you'd type "15" (without the quotes) into the **Adjustment** column for that field.

- o **For Text Fields** – Click the button with three dots to the right of the **Difference** column. In the screen that appears, enter each of the descriptions you might use for each comp into the **Description** column. In the **Value** column, enter a dollar value that you'd like to apply to any comp that differs from the subject. For example, if in the **Condition** field you would normally use "Excellent," "Average" or "Poor," enter these values in the left column (leave the additional fields blank). Then, if you would normally make a \$1,000 adjustment 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 you've completed the **Adjustment Table**, click **OK** to save it.

3. To apply an adjustment threshold that prevents automatic adjustments below a specified dollar value, use the **Difference** column to enter a minimum dollar value adjustment that WinTOTAL must exceed before applying the adjustment.

WinTOTAL automatically applies your adjustment rules to your report as you leave each field.

Saving Adjustment Rules

Since the same set of adjustment rules do not apply to every report, you should save your adjustment rules so that

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you can retrieve them when you work a report for which they apply. To save your adjustment rules...

1. In the [side-by-side comps view](#), use the auto-adjuster to define your adjustment rules.
2. After creating the adjustments you need (as you might do for a neighborhood, for example), click **Save As** at the top of the **Auto Adjustments** column.
3. 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.
4. Click **OK** to save the assumptions.

Loading Adjustment Rules

As you continue working new reports, you will need to load the proper set of saved adjustment rules in order to have WinTOTAL automatically apply the right adjustments to your comps. To load a set of adjustment rules...

1. In the [side-by-side comps view](#), open the auto-adjuster by clicking the auto-adjuster button at the top of the subject column.
2. Click **Load** and choose the desired assumptions set from the list
3. Click **OK** to accept your choice and apply your automatic adjustment rules across all comps in the report.



Hint: Your auto-adjustment assumptions are saved as part of the report. When you clone an old report, or use the SmartMerge feature, the auto-adjustments are

brought along.

Comps Database

The Comps Database is your central location for getting the most out of one of your most precious resources. When adequately stocked with an ample supply of comp data, your WinTOTAL Comps Database can virtually replace your MLS as a source of reliable comp information. Moreover, if you add comps from your old reports into your database, you can even place comps in the grid with data in your own shorthand! Regardless of where you acquire your data, the Comps Database is a fast, improved, appraiser-centric replacement solution for your MLS print outs and county records. To access your Comps Database...

1. In WinTOTAL, click **Comps** in the toolbar at the top.
2. Then, click **Comps Database** in the **Comps** pane on the left to open the comps database.



Hint: For a faster way to access your Comps Database, you can create a [HoverLink](#) directly to it. This is great for those avid Comps Database users.

Import Comps

The first step in using your Comps Database effectively is to fill it with reliable comp data. While you may get your comp data from your MLS, county records, other appraisers, old reports, or another public source, the WinTOTAL Comps Database has a way for you to import them. There are four

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primary ways to import comp data into WinTOTAL's Comps Database:

- [Manually type the data](#)
- [Import it from your File Cabinet](#)
- [Import it from open reports](#)
- [Import it from your MLS or another electronic source](#)

Enter Comps Manually

To add a comp to your database manually...

1. In the [Comps Database](#), click **+** **Add** in the toolbar at the top.
2. Click **Manually** to open the **Add Comparable** screen.
3. Enter the required data in the fields, keeping in mind that QuickLists are available to insert common terms.
4. Click **Add** in the **Photo** pane to select a photo to associate with this comp. Select the photo from your hard drive and click **Open**. Alternately, you can copy a photo from another location and paste it into the comp by clicking **Paste**.
 - Click **All comp fields** in the **Views** pane on the left to expand the form to allow more data.
 - Click **Summary fields** to limit data to info in comps grid. Notice that several of the items have additional fields in which you can enter specific data that may or may not appear on certain forms. This data can be used to make automatic adjustments, but won't print on the report. See the [Comps Detailed View](#) section of this user guide for more information about this feature.

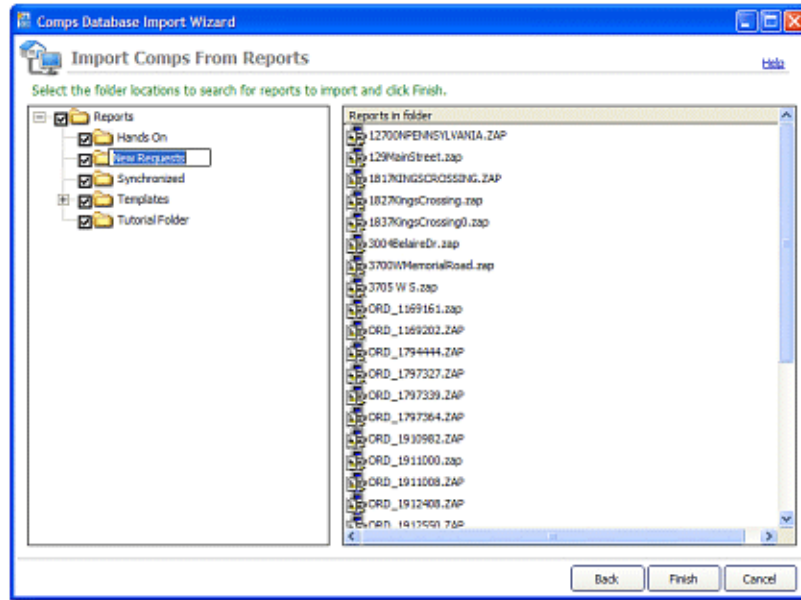
5. When completed, click **OK** and your new comp is added to the database.

Import Comps from Old Reports

If you've been using WinTOTAL to write up your reports for a while, you've accumulated a wealth of information you can add into your comps database for quick access later. To capture the power of that information in your comps database, you simply need to import it. Before you begin, you may want to collect all of the reports from which you wish to import comp data and place them in a single folder in your Appraisal Desktop File Cabinet. If you have a huge number of files (over 500), you may need to divide them among two or more folders to process them in batches. Once you're ready to begin, to import comps from your old appraisal reports...

1. From the [Comps Database](#), click **Import**.
2. Select the **Import from reports in your File Cabinet** option, and then click **Next**.
3. Choose a cutoff date to insure that you do not pull in comp data older than your cutoff date, and then indicate how you want WinTOTAL to deal with duplicate comps by checking the **Search for duplicate comps** box and marking your choice. When finished, click **Next**.
4. Select the desired folder from list. Individual reports stored in that folder appear in the window to the right for _____ reference.

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5. Click **Finish** to begin the import.

Import Comps from Open Reports

To import the comps from your current report in your database...

1. In the [Comps Database](#), click **+ Add** in the toolbar.
2. Click **WinTOTAL** in the screen that appears.
3. To import the subject property, check the **Import the Subject** box.
4. Select **Prompt for additional comp information** if you prefer to add additional data to each comp during the import process.

5. Check the **Search for Duplicates** box to automatically search your database for duplicate comps before importing them. If desired, check the **Preview each duplicate found** box to force WinTOTAL to prompt you whenever it finds a duplicate. You're then given the option of adding duplicate comps anyway. If this option is not selected, any comps with duplicate addresses are ignored.
6. Finally, check the final box if you'd like to have any photos associated with a comp imported as well.
7. Click **OK** to begin the import process.
8. If you selected the **Prompt for additional information** option, a screen appears for each comp allowing you to enter items like the neighborhood name, notes, sale date or age. Enter the desired data and click **OK**. Repeat for each comp, or click **Stop prompting me for this information** to discontinue the prompts.

Import Comps from Data Sources

A great way to get comp data into your database is by importing it from a source such as your MLS. Most modern systems have a service that provides you with sales data in a common database-compatible format. WinTOTAL supports the following data types:

- Microsoft Access 97 or 2000 (.MDB)
- Comma delimited (.CSV)
- Text file (.TXT)
- Xtensible Markup Language (.XML)
- Pipe delimited

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- Tab delimited

Using WinTOTAL's MLS import tool is a two-step process:

1. [Define an import template for your MLS](#) and import the first time
2. [Re-use the import template for future MLS export files](#)



Hint: For best results, download new comp data from your MLS on a regular basis. By regularly importing the new data into your Comps Database, you can ensure that the existing data in your Comps Database is both extensive and as up-to-date as the data in your MLS.

Define MLS Import Templates

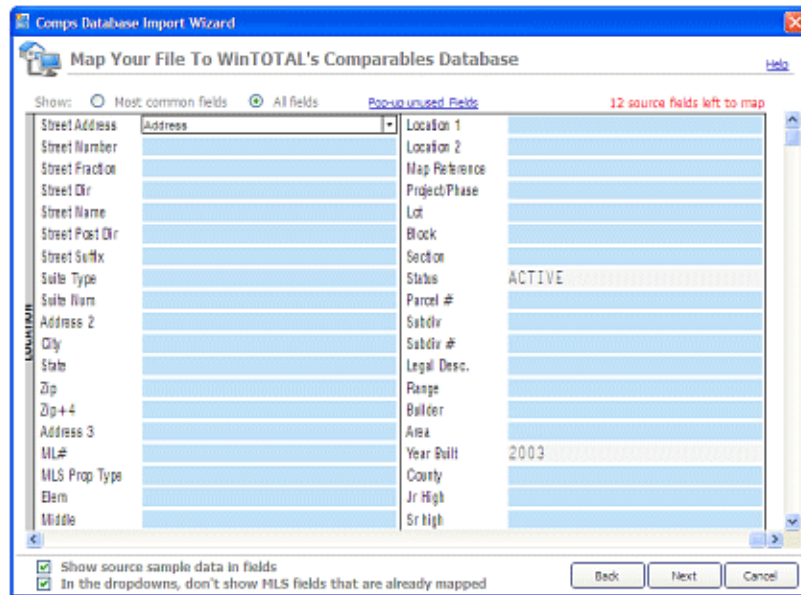
The first time you import data from an electronic data source like your MLS, you must tell WinTOTAL how to accurately import the information. Once you've done so, WinTOTAL automatically imports the data from your first file. Then, for future files that you've downloaded from your MLS or other electronic data source, you can simply re-use the template you've already created. To define your MLS import template:

1. Obtain the comp data file from your MLS provider and save it on your hard drive.
2. In the [Comps Database](#), click **Import** in the toolbar.
3. Select **Import property data from external source** and click **Next**.
4. Click **Browse**, find and select the import file from your hard drive, then click **Open**.
5. Type a description for your template so that you can quickly refer back to this template when you import additional data from the same source in the future.
6. Select either the **Residential** or **Commercial** option to reflect the type of property you're importing.
7. If necessary, check the **Search for Duplicates** box and tell it how to handle any it finds. Options are:
 - Don't Add Duplicates
 - Update the Existing Comp
 - Preview each duplicate found and let me decide what to do
8. Click **Next** to continue.
9. Since WinTOTAL automatically guesses the correct delimiter, it should already be selected for you. If WinTOTAL is unable to guess the correct delimiter, choose a different delimiter from the selection box. You can also select a **Text Qualifier** if your data source uses a particular character (most often a quote "") to designate text fields.
10. Ensure that the data looks correct in the sample window and click **Next** to continue.
11. Now you need to choose the data fields that you want to import from the source file, and tell WinTOTAL into which WinTOTAL fields you want to insert each MLS field. WinTOTAL always makes an educated guess about what data belongs in which fields. When it knows, it automatically maps those fields for you. In the event that WinTOTAL is unsure about where to place the data from your MLS, it makes those data fields available in a drop-down list so that you can choose which WinTOTAL field maps to your MLS field.

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Note: You can select as many fields as necessary and you can insert the same field more than once. This is useful if your data source has information in one field that you would like to divide up and place in multiple fields.



12. To map the remaining fields, click **Pop-up unused fields** at the top and review the list of fields you still need to map.
13. Find a field in the sample form that WinTOTAL provides to map any of the remaining fields from your MLS file.
14. When you've found a field on the WinTOTAL sample form that correlates with a field from your MLS file, just click it and choose the appropriate field from the drop-down menu.

15. Repeat this process until you've mapped all the remaining fields from your MLS file and then click **Next**.
16. The spreadsheet-like tool that appears next is useful for manipulating data from your source file before it is imported into your Comps Database. For example, you might need to consolidate data from several fields into one item. Or, you could find a "code" in a source field that indicates a feature of the property. You can use the power of the spreadsheet's text handling formulas to find this information and put it into a format that is more useful to you in your appraisal practice.
17. Enter the desired formula in the cells and click **Finish**.
18. If you chose to preview duplicates, use **Add New**, **Update Existing** or **Skip options**.
19. When the **Import Complete** message appears, click **Close** to complete the process.

Use MLS Import Templates

After you've defined an MLS import template for your local MLS, you can use the same template to quickly import data from download files you generate from your MLS later. The next time, you need to import data from the same source, copy the new data file to your hard drive, then:

1. From the [Comps Database](#) screen, click **Import**.
2. Mark the **Use a previously defined template** option and click **Next**.
3. From the drop-down menu, select the import template you wish to use.
4. If necessary, select **Edit this template** and click **Next** to repeat the above steps.

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5. Otherwise, mark **Proceed to Finish Page** (import now) and click **Next**.
6. If any errors occur during the import process, an error log appears, allowing you to correct the error and re-import the data or enter it manually.

Search for Comps

Of course, the real power of any database is the ability to search for information quickly. The Comps Database has several search options.

Quick Searches

The **Search** pane on the left contains several common search fields.

1. From the [Comps Database](#), enter search criteria in any or all of the fields listed in the **Search** pane on the left. Use complete information or partial text. For example, in the address field, either enter the full address, or just the street name.
2. In the **Proximity Within** field, enter the distance — in miles — from the subject property within which you want to limit the search. Enter whole numbers or decimals



Note: For the proximity searches to function properly, WinTOTAL must pinpoint each property through

“geocoding” the addresses. This process can be scheduled to run on a regular basis, ensuring that your database is ready for any search. See [Geocode Comps](#) in the [Configure WinTOTAL](#) chapter of this user guide for more information about setting up this feature.

3. Click **Find Now** to display comps that match your criteria.
4. Click **Clear Search** to reset your list to show all comps.

Custom Quick Searches

Of course, you’re not limited to searching in the fields included by default. You can choose also choose your favorite fields from a provided list and add them into the **Search** pane on the left. To do so...

1. From the [Comps Database](#), double-click the desired field in the list on the left to add it to your **Search** pane. Similarly, double-click any item in the right column to remove it.
2. Use the **Up** and **Down** buttons to reorganize the items in the list.
3. Click **OK** to accept your changes.

Advanced Searches

Instead of customizing the quick search fields, you can always perform a detailed search. To do so...

1. In the [Comps Database](#), click **Detailed** at the top of the **Search** pane.

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2. Once again, you can customize which fields appear in the **Detailed Search** window by clicking the **Customize** button. Use the steps above to add the desired fields.
3. Enter your search criteria and click **Search**. The results of your search are displayed in the **Comps Database** window.



Note: You may need to re-arrange the windows on your screen to view the Comps Database window. If you have limited screen area, click the **Close after search** option in the **Detailed Search** window.

4. Continue to modify your criteria and click **Search** each time to narrow your search even further.
5. When the desired results are displayed, click **Close** to return to the Comps Database display.
6. Click **Clear Search** at the bottom of the **Search** pane to reset search options and display all of your comps.

Map Comps

It's often easier to spot valid comps when you see them laid out on a map. The Comps Database can quickly generate a map showing the location of any selection of comps. To do so...

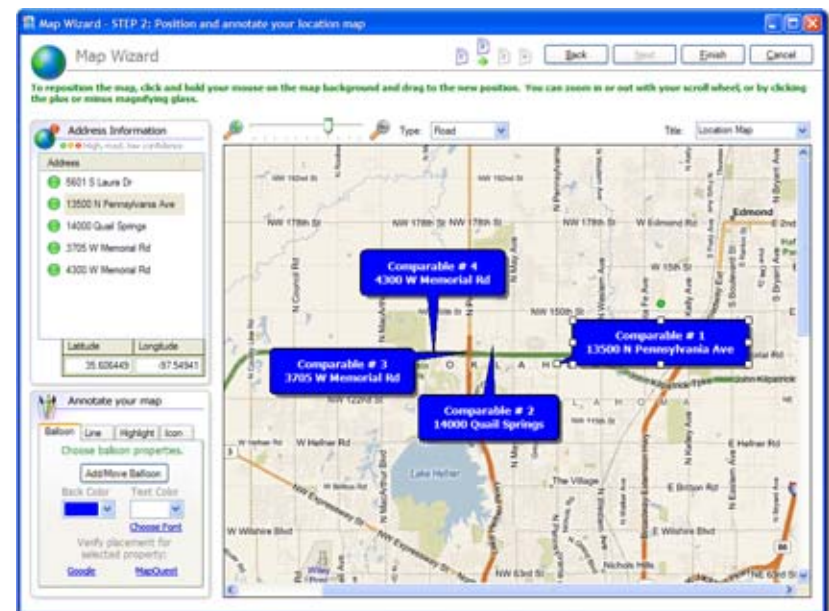
1. In the [Comps Database](#), select comps you'd like to map by checking the box to the left of each property.



Hint: Use the Comps Database's search features to display a limited number of comps that meet your criteria. Then, right-click any comp and choose **Mark**

Comps, Mark All from the pop-up menu.

2. Click **Map** in the toolbar at the top, or right-click anywhere in the Comps display and select **Map, Selected comparables** from the pop-up menu.
3. In the **Maps Wizard**, confirm the property addresses and click **Next**.



4. Modify your map as desired using the annotation tools in the **Annotate your map** pane.
5. Click **Finish** when you're done.
6. Next, you're prompted to add the map to your digital workfile for this report to better maintain compliance with USPAP. Just click **Yes** or **No** to indicate your choice.

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Another option is to use a map to find all comp within a certain radius of the subject. To do so...

1. In the [Comps Database](#), right-click any comp in the list. From the pop-up menu, choose **Map**, then 1, 2, 5 or 10 miles. To enter a different distance, click **Custom**, type the amount and click **OK**.
2. In the **Maps Wizard**, confirm the property addresses and click **Next**.
3. Modify your map as desired using the annotation tools in the **Annotate your map** pane.
4. Click **Finish** when you're done.

View Database Comps

When you first enter the [Comps Database](#), you're presented with a list of comps with limited information in columns. However, there's a wealth of information just under the surface.

- Quickly sort the comps list by clicking header name
- Click the plus sign (+) for any comp to view the details for that property. Note the new MLS-oriented view of the information.
- To select which fields are shown in the detail view:
 1. Right-click any comp and choose **Edit, Property Detail Fields**.
 2. From the list of available fields on the left, double-click the ones you want to include. Similarly, double-click any item in the right column to remove it from the detailed view.

3. Use the **Up** and **Down** buttons to reorganize the items in the list.
 4. Click **OK** to accept your changes.
- To edit which columns appear, right-click any heading and select **Edit, Column Layout**. Use the steps 1-4 above to add or delete columns.

Insert Database Comps

Once you've found the comps that you want to use in your report, it's easy to place them in your report. To do so:

1. In the [Comps Database](#), check the boxes next to the desired comps.



Hint: Use the Comps Database's search features to display a limited number of comps that meet your criteria. Then, right-click any comp and choose **Mark Comps, Mark All** from the pop-up menu.

2. Click **Place** in the toolbar at the top. When you're prompted to confirm your comp placement, just click **Yes** to place your comps in the grid.