Order PowerView

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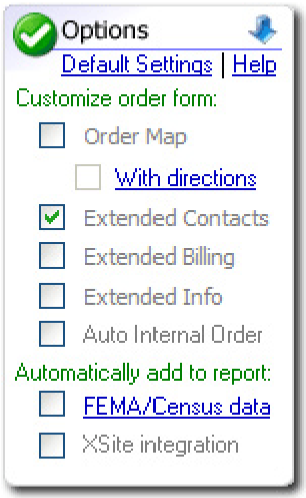
Since time efficiency is key to running a successful appraisal business, the **Requester** has been replaced with a more powerful **Order** PowerView to help you manage and begin your appraisal orders. Since the **Order** PowerView uses a form instead of an application like the Requester, you can now enter even more information on the fly. While you could use the **Requester** to help you fill out all the fields in your forms, the new **Order** PowerView allows you to geocode your property, add a map, and get driving directions before you even begin your form work. There are two ways to access the Order PowerView:

1. Open an existing report and click **Order**.
2. Click **New** in the upper left corner of WinTOTAL or the Appraisal Desktop to create a new report. WinTOTAL takes you to the Order PowerView automatically to assist you in starting your reports.

Set Up Order Preferences

As you fill out the order form in the **Order** PowerView, you have the option of allowing WinTOTAL to complete several tasks for you on the fly. These items are controlled from the **Options** menu located on the left side of the **Order** PowerView. To automate some of the initial order setup processes in your report, check each of the options you wish to apply using the **Options** pane to the left of the Order PowerView. Options include:

- **Default Settings** - Allows you to determine how WinTOTAL names your new report files and whether you automatically or manually push your WinTOTAL orders to your XSite.
- **Order Map –** Automatically adds a map to your order form when you fill in the full subject address for your order.
- **With Directions –** If you opted to include a map in your order form, checking this option adds directions from your office to the subject property to your order form as well.



- **Extended Contacts –** Adds new sections to your order form permitting you to add detailed information about all of your contacts to it.
- **Extended Billing –** Adds a **Billing** section to your order form to help you track billing and payment for your report. This section replaces the **Billing** PowerView in Athena.

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- **Extended Info –** Adds another section to your order form allowing you to add notes and a wealth of other information about the subject property.
- **Auto Internal Order –** WinTOTAL automatically generates an order number for each new report when this option is selected. To specify the format of the numbering, click on the link and set your preferences in the screen that appears. See the Automate Order Numbering section of this user guide for more details.
- **FEMA/Census Data –** Automatically adds IDC data to the appropriate fields in your report as you fill out your order form.
- **XSite Integration –** If you have an Appraiser XSite and want to keep your XSite order list in sync with WinTOTAL, just mark this option. If it's your first time using XSite Integration, click the **XSite Integration** link next and enter your XSite **Username** and **Password**.

Note: Whenever a new order from your XSite is downloaded into WinTOTAL or a new order is pushed from WinTOTAL to your XSite, an XSite symbol appears in the **XSite** column to indicate that the synchronization is complete.

Change Start Points for Directions

If you use WinTOTAL to retrieve directions to your property inspections, you may need to change the starting location for those directions from time to time. In WinTOTAL's **Order** PowerView, you can specify an alternate starting point for your driving directions. To do so…

1. In WinTOTAL's Order PowerView, check the **Order Map** and **With Directions** boxes in the **Options** pane on the left side of the screen.
2. Click the **With Directions** link in the **Options** pane.
3. In the screen that appears, indicate whether you want to start from your local office address or from an alternate starting point by checking or unchecking the **Use Local Office Address** box at the bottom.
4. If you're using a start point other than your local office, type in the address you wish to use as the starting point for your driving directions into the available boxes.
5. Finally, click **OK** to apply your changes.

After a few moments, WinTOTAL automatically changes the driving directions in your order form to start from the new location.

Automate Order Numbering

If you've defined your own custom order numbering scheme to help you keep track of each new order that comes into your office, you may be able to use WinTOTAL's auto-numbering tools to automate the order numbering process so that you don't have to manage it. To enable automatic internal order numbering…

1. In WinTOTAL's Order PowerView, check the **Auto Internal Order** box in the **Options** pane to the left of the **Order** PowerView of the Appraisal Desktop.
2. Next, click the **Auto Internal Order** link.

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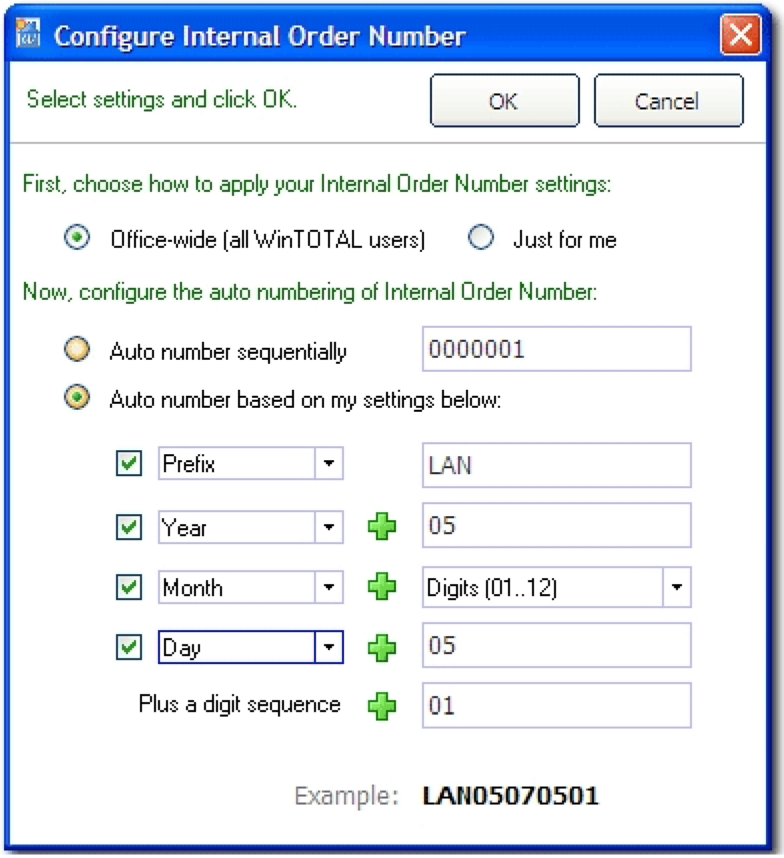
3. When the **Configure Internal Order Number** window appears, determine whether you want to make your order numbering system available to all users on your network or just on your machine and then mark either **Just for me** or **Office-wide (All WinTOTAL users)** option to indicate your choice. If you're not using a network installation of WinTOTAL, mark the **Just for me** option.

Note: If you're using a network setup of WinTOTAL and you select to use this as an **Office-wide** setting, it applies to all users in your network and can be changed by all users in your network. If the other users in your network wish to use a different internal ordering scheme, they must repeat this process and use the **Just for me** option.



4. Next, configure the auto-numbering scheme you'd like to use for your internal order numbers by choosing from the following options
   - **Auto number sequentially** – Increments the internal order number each time you generate a new report. When you choose this option, you need to designate the starting number for your internal ordering scheme.
   - **Auto number based on my settings below** – Provides a customizable format for your automatic

internal order number. Using this option you can include a prefix, year, month, or day in your internal order and control the order of their appearance.

Hint: If you're using the **Auto number based on my settings below** option, you can preview the internal order number format by viewing the **Example** field at the bottom of the window.

5. Depending on which option you chose, you must either configure the starting number for your internal order number or the prefix, day, month, year, and order of appearance in your internal order numbering scheme.
6. When you're finished, click **OK** to implement your internal order numbering scheme on all your future appraisals.

Complete the Order Form

In order to take advantage of all WinTOTAL's time saving features, you should take the time to fill out as much information as possible. Where applicable, WinTOTAL uses this order information to fill out related fields throughout your report.

1. Through the Order PowerView, fill out a **Report Description**, **Property Address**, **City**, **State**, and **Zip** at a minimum.
2. For best results, be sure to select contacts from your contacts database using the drop-down menus provided beside each contact field.
3. Finally, fill out any additional information in your order form as are necessary. As you're filling out the order form, keep these things in mind to assist you in filling it out quickly.

   o QuickLists are available in the pane to the left of the screen to help you fill out your order form quickly.

   Hint: One of the fastest ways to fill out the order form is to create QuickList entries for the different products you offer or the different areas you regularly appraise. With a strong set of product or area based QuickLists, you could easily fill out the entire order form and invoice with only a few clicks.

   o Notice that the field color changes to gray to indicate you've been to this portion of the form as you move through the fields in the order form. Fields you have not updated remain blue.

   o In any field that contains the or icon, you can select data from or add entries to your Contacts Database.

   o In any field that contains the icon, you can select a date from a pop-up calendar that appears when you click the icon.

   o In the field that contains the icon, you can automatically insert a location map, flood, and census data into your report when you click the icon.

   o In the appointment field that contains the icon, you can add your appointments to your Outlook or XSites calendar to help you maintain your schedule.

   o When the » icon appears in a field, click it to designate that the content of that field is the same as either the Internal Order, Lender Case, Client File or FHA/VA case numbers entered in the **Tracking** section of the order form.

- Additional fields have a drop-down menu from which you can choose additional “Same as..” data. The items displayed in these menus change depending upon the type of information each field might contain. For example, the **Client** field can be the “Same as” the **Lender**, the **Bill to** or the **Ship to** fields.
- When the icon appears in a field, this indicates the presence of a “recent response” entry. Use your mouse and click the icon to display the list of your most recent entries in that field. Or, press **Alt + Down Arrow** on your keyboard.

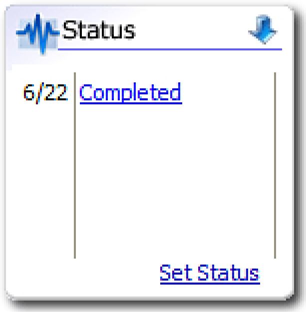
Get Flood & Census Data

If you want to have a bit more control over what data WinTOTAL automatically inserts into your report when it gathers flood, census, and other data from the Internet, you can define your preferred format for that data in WinTOTAL’s Order PowerView. To do so…

1. In WinTOTAL’s Order PowerView, check the **FEMA/Census Data** box and then click the **FEMA/Census Data** link in the **Options** pane on the left.
2. Mark your preferred data using the provided settings. Options include:
   - Make all addresses and other inserted data in uppercase
   - Append the FIPS # to the beginning of the Census Tract
   - Control which information (Census Tract, FEMA Zone, Subject Address/Zip, etc) is automatically retrieved for you by having WinTOTAL prompt you each time, download all data, insert only data that it finds when it connects to our servers, or choose the data you want WinTOTAL to add to your report automatically by checking the each option.
3. When finished, click **OK** to apply your changes.

Set Status

In addition to the status tools provided in WinTOTAL’s Appraisal Desktop, you can also view and update your status history through WinTOTAL’s **Order** PowerView.



Viewing Status Details

To view the full details for any status item in your order’s status history…

1. In the Order PowerView, click the status name’s link in the **Status** pane on the left. WinTOTAL replaces the order history with a detailed explanation behind the change in order status. You can view the time and date that the status change occurred in addition to any notes

you may have included at the time you changed the order status.

2. Use the **Previous** and **Next** buttons to see the detailed information for each previous status change.
3. Click **Back** at the top of the **Status** pane to return to the order history overview.

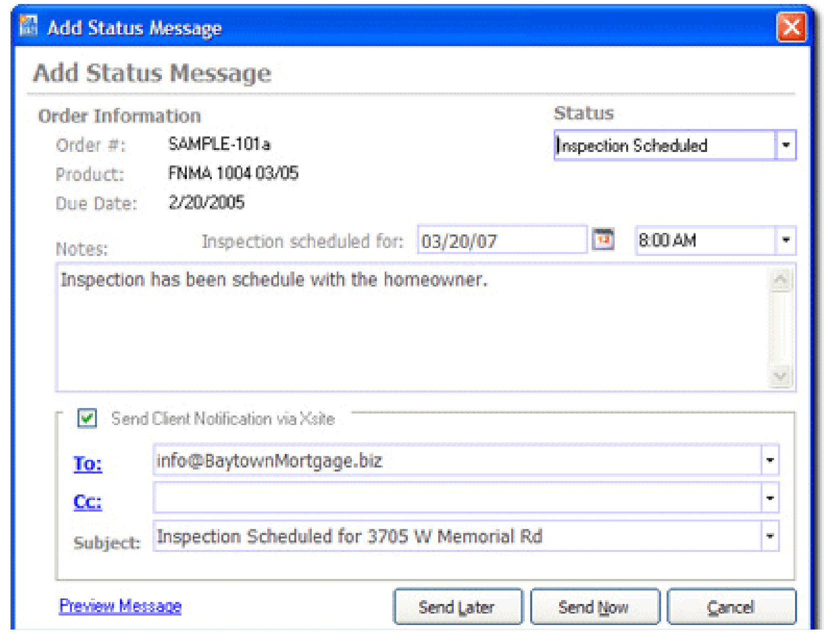
Hint: To quickly review an entire status history or update the status of numerous reports in a hurry, you can use the detailed file view provided in WinTOTAL's Appraisal Desktop.

Updating Order Status

To update the status of your current report…

1. In the Order PowerView, click **Set Status** in the **Status** pane to the left.
2. When the **Add Status** window appears, choose the desired status from the drop-down list in the upper, right corner. If none of the provided items seems appropriate, just choose the **Message** status.
3. Type any comments you want to include with the status change in the **Notes** box. If you chose either the "Inspection Scheduled" or "Inspection Complete" items, you can also fill in a specific date.

Note: If you're using WinTOTAL's status tools in conjunction with your XSite so that you can benefit from proactive status messages, the **Notes** field becomes the body of the status notice e-mail.



4. If you've integrated with your XSite and you wish to send a notification of this status change to your client, check the **Update Client** box.
5. Then, use the drop-down menus to select a recipient and subject for your message or just type that information yourself.
6. When you're finished, click **Send Now** to submit your status change immediately or click **Send Later** to add it the net.X Connect queue of items you're going to send later.

Merge in Report Data

WinTOTAL's SmartMerge function takes the place of the clone function provided in older versions of WinTOTAL, placing far more data merging power into your hands as you begin your reports. WinTOTAL now allows you to merge data from individual sections of forms, as well as the whole form or the whole report at any time during the life or your report. You can even merge multiple different reports with different sections of each report you merge to help speed up your formfilling process without any concern about any data being overwritten. Merge simply blends the data you select with the data you've already placed into your report. To merge in data from another report or template…

1. In WinTOTAL's Order PowerView, click **Merge** in the toolbar at the top of the **Order** PowerView.
2. Find and click to select a report from which you wish to merge data. If necessary, use the **Look for** field to locate the desired report or "template" file.
3. Indicate whether you want to merge the **Entire report** or just the Selected **forms** in your report by marking the corresponding option.
4. If you choose to merge in just selected data from your other report, the forms contained in that report are displayed below the file list. Double-click each form in this box to select or deselect it for inclusion in your new report. Click **Mark All** to select all of the forms in the report.
5. Once you've indicated what you want to merge from your old report, click one of the buttons in the top toolbar to tell WinTOTAL how to blend that data into your current report. Options are:
   - **Merge in forms AND data** – Blends the selected data into the data that already exists in your report, adding new forms to your report when necessary.
   - **Merge in forms only** – Adds blank copies of the forms you've specified into your current report. As with other merge options, this option does not overwrite the data in your report.
   - **Clone** allows you to make an exact duplicate of the older report. Any information you entered in the order form is overwritten with the data from the older report. If desired, click the check box to ensure that any tracking data (order date, etc) is not deleted.
   - Merge in forms only allows you to merge the forms from the older report, but without the data in them.

Add Forms to Reports

Adding additional forms into your report is simple. Just use the contents view to navigate out to the forms you want, drop them into your report, organize them, and you're done. Specifically, to add forms to your report…

1. From either the Forms PowerView or the Order PowerView, click **Contents** in the toolbar.
2. From the **Contents** window, find the form you want to add in to your report. Depending on your preferences, you can find forms in one of several ways.
   - You can search for the form by typing a search phrase into the provided box and clicking **Find**. If you want to search by form number, type a **#** sign followed by the form number without any spaces and then click **Find**.
   - You can scroll through the forms list and find the form based off of the folder organization. Just

double-click any folder to expand it and show the available forms.

- You can customize the **Most Common (Custom) forms** list to show your list of needed forms and simply jump to that when you access contents. If you want to customize your Most Common Forms list, click the **Click to Customize link** and add in your favorite forms.

3. If necessary, click the **Preview** link to the lower right corner to see a live preview of the selected form.
4. When you locate the desired form, double-click it to add it to your report, or click and drag it across.
5. On right side, the forms currently in your report are displayed. You can change the order of these forms by dragging them up or down the list. Or, use the **Move Up** and **Move Down** links.
6. To remove a form from your report, select the form and click **Delete**.

Note: Do not double-click the form in this case, as that switches WinTOTAL to the **Forms** PowerView with that form open.

7. If desired, you can change the name of this form for this report. Select the form and click the **Rename** link. Type a new name and click **OK**. Renaming the form here does not affect the default form name, but it is reflected in any future reports you may create by merging this report.
8. At the bottom of the window is the option to keep the contents window open even after you click **OK**. If you have dual monitors or a particularly large display area, you may want to select this option so you can continue to add forms as necessary without calling up the **Contents** again.
9. Click **OK** to return to the order form.