# Tools

## Tools

The **Tools** menu is WinTOTAL's centralized location for all of its time saving tools. In addition to the tools introduced in Athena, Aurora has a number of brand new tools like the **Change Case** tool to help you complete your appraisals quickly and easily.

## Spell Check

WinTOTAL's spell checker lets you spell check your entire report either all at once or piece by piece. You can also add words to the spell checker's dictionary. To use WinTOTAL's spell checker…

1. In the Forms PowerView, click **Spell** in the toolbar at the top of the screen to spell check the entire report or click the **Tools, SpellCheck, Check whole report** from anywhere in WinTOTAL.
2. If you need to limit your spell check to certain portions of your report, additional options in the spell checking options in the **Tools** menu are:
   - Check current field
   - Check selected fields
   - Check current form
3. As you run the spell check, you are prompted to add unknown words to the dictionary associated with your **WinTOTAL Username**.
4. To add or remove words in the dictionary, click **Tools, Spell Check, View/edit user dictionary** from the menus in the toolbar.

## Change Case

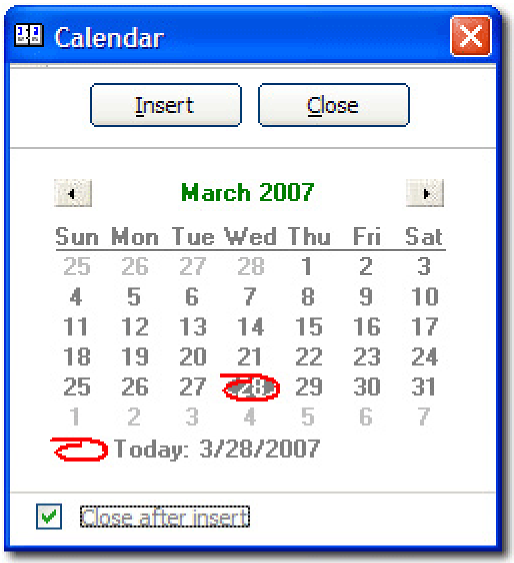
Consistency is a key way to maintain a professional face to your business. Until now, if you've been working on your report, there hasn't been a quick way to give your report a face lift before sending it out the door. Now the **Change Case** tools, new in Aurora, help you ensure that your appraisals go out the door with the same capitalization scheme throughout the report. To change the case of any or all text in your report…

1. In the Forms PowerView, click **Tools**, **Change Case**, **Change whole report** from the menus. Alternately, you can limit the case change to:
   - The current field
   - All selected fields
   - The current form
2. Once you've selected the option that suits your needs, you're prompted with a choice of case format. Pick the option that suits you best and click **OK** to apply the changes.

## Calendar

WinTOTAL provides a basic calendar tool through the tools menu to help you quickly find exact dates and insert them into the fields of your report. To insert a date into a WinTOTAL field with the calendar…

1. Anywhere in WinTOTAL, place your cursor in a date field and click **Tools**, **Calendar** from the menus.




2. Navigate through the calendar to find the date you want to insert.
3. When you find the desired date, click to select it and then click Insert to place it into your report field.

## File Labels

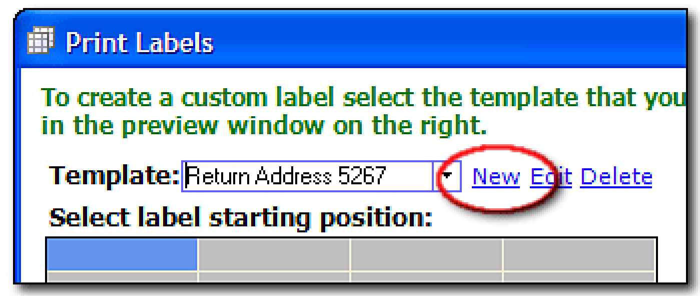
The ideal of the “paperless office” continues to elude most appraisers. While some functions — such as the digital workfile — are now handled electronically, many appraisers are still more comfortable with the old manila folder. If you prefer the paper-based approach, you can print labels for your work folders from within WinTOTAL. Using WinTOTAL’s File Labels tool is a two-step process…

1. Create a label template to use.
2. Print the label using your template.

### Creating Label Templates

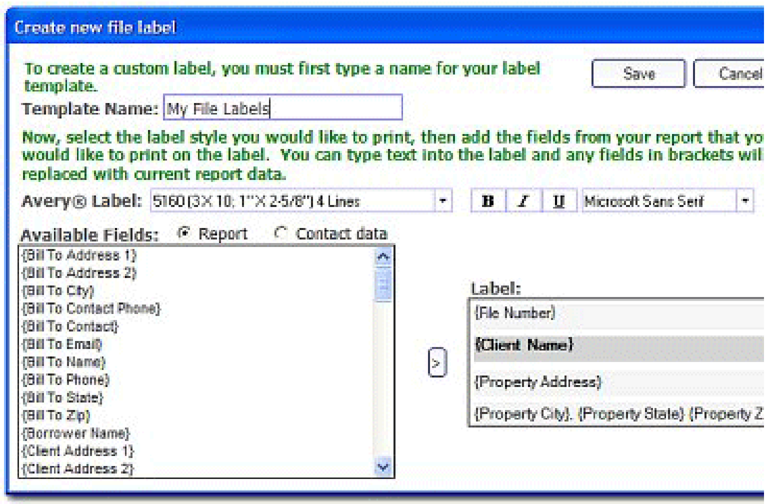
To create a file label…

1. Click the **Tools** menu, and then select **Create File Labels**.
2. From the **Print Labels** screen, click **New** at the end of the **Template** drop-down menu.




3. Type a name for your labels in the **Template Name** box.
4. From the **Avery® Label** drop-down menu, choose one of the pre-defined label types. If you’re using a non-Avery label, pay attention to the label sizes listed.
5. Begin building your label using any combination of three data types. Click the **Label Template** box to place your cursor in the desired spot and then:
   - Click the **Report** option to display a list the fields from your report. Scroll through the list to find the field whose information you’d like included on your label. Double-click the field name and a code is inserted in the **Label Template**. When you print the label, this code is replaced with information from the report.

- o Click the **Contact data** option to display the fields related to your office. Double-click any field to place it on your label.
- o With your cursor in the **Label Template** box, begin typing to insert text or spacing. Do not type anything between the brackets { } surrounding the codes you inserted from the lists. Depending upon the type of label you selected, you may have anywhere from two to five lines available.




6. When your label template is complete, click **Save**.

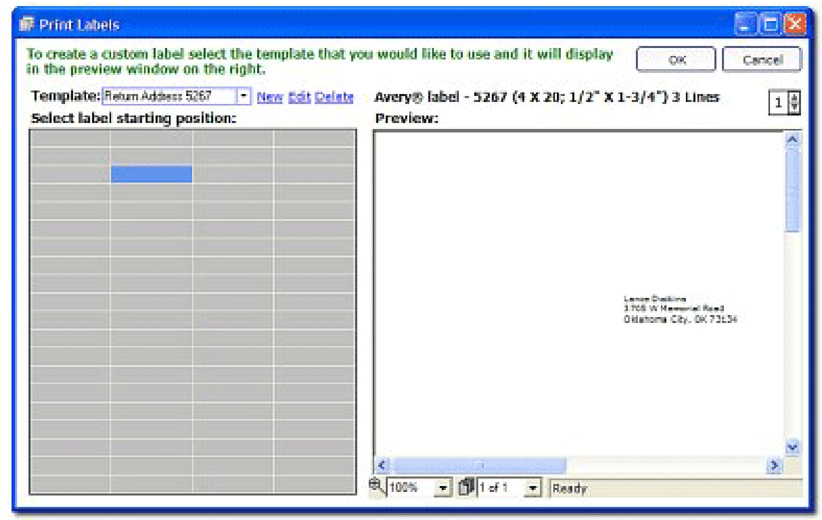
### Printing File Labels

To print a file label for a report…

1. With the desired report open in WinTOTAL, click the **Tools** menu, then select **Create File Label**.

- OR –

From the Appraisal Desktop, select a report in the **Files** list, then right-click and choose **Create File Labels** from the pop-up menu.




2. From the **Template** drop-down menu, select your desired label format.
3. Depending upon the type of label your template uses, the label grid changes, showing you a sheet of labels. Click the label location on the sheet to the left to indicate the label you want to print. This is useful if you have a sheet of labels that is only partially used.
4. If you are curious how your label looks, click **Zoom** at the bottom of the screen to get a closer look.
5. If you need to tweak the label format, click **Edit**. Make your changes as necessary and click **Save** when finished.

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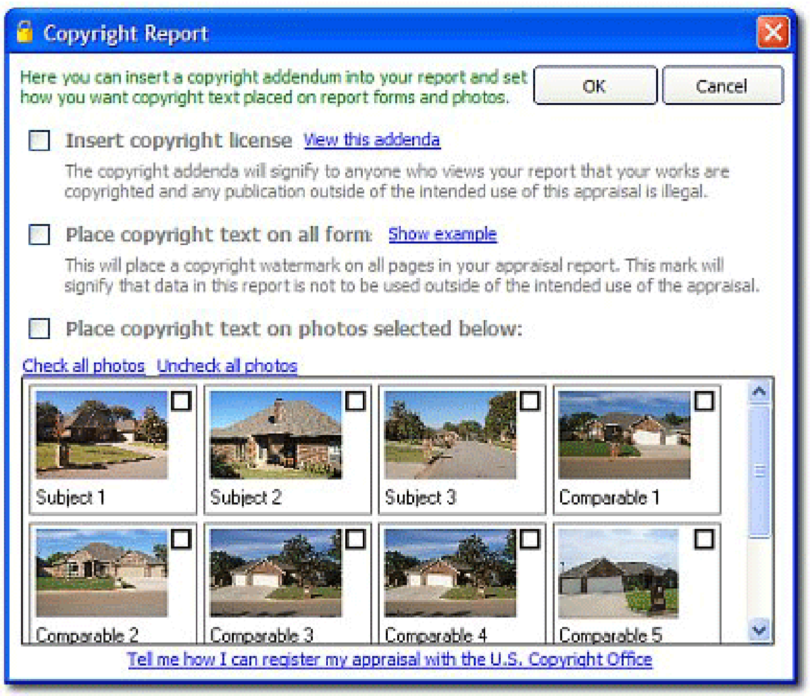
When you label is ready, click **OK**. The Windows **Print** screen appears, from which you can select the printer that holds your labels. Click **OK** to send the label to your printer.

## Copyright Reports

New to the Aurora release of WinTOTAL is the ability to copyright your appraisal reports to ensure that their content is legally protected for legitimate use only. To copyright a report…

1. Open a report you wish to copyright.
2. Once it's open, click **Copyright Report** in the **Tools** menu.




3. When the **Copyright Report** screen appears, mark each of the options you wish to use in your copyright protection. Options include:
   - **Insert copyright license –** Inserts a copyright license into your report to provide a clear understanding of the copyright's implications.
   - **Place copyright text on all forms –** Labels each form in your report as copyrighted.
   - **Place copyright text on photos selected below** – When you mark this option, you can choose to include the word "Copyright" on any or all of your appraisal photos by marking the photos you'd like to copyright.
   - **Tell me how I can register my appraisal with the U.S. Copyright Office –** This link takes you directly to the page of the government's copyright website that outlines how you can copyright your report.
4. Once you've selected the appropriate options for your copyright, click **OK** to copyright your report.

WinTOTAL flags your report as copyrighted and adds an unlimited use license agreement to your report, explaining the terms of use for your appraisal report.

## Area Calculator

If you don't use a sketch program to calculate areas, WinTOTAL comes complete with an interface for entering room dimensions in the Area Calculator. To use the **Area Calculator**…

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1. Anywhere in WinTOTAL, click **Tools**, **Area Calculator** from the menus.
2. Type your figures in the appropriate fields, specifying the type and level of the area you're calculating.
3. Check the option to automatically transfer the figures into your report if desired.

**Note**: When you're using the **Building Area Addendum** form, you must use the Area Calculator in order to enter figures onto the form.

4. When finished with your calculation, **OK** to close the window and insert any calculations you specified.

## Area Estimator

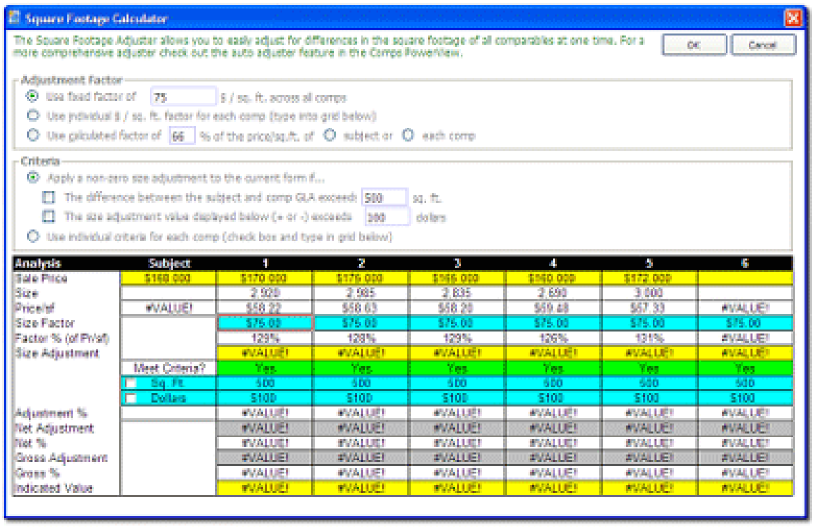
Calculating the area of an irregular lot can prove a challenge for even the most geometrically-gifted appraiser. WinTOTAL provides a simple utility to estimate areas using the "average side" method. To use the area estimator…

1. Anywhere in WinTOTAL, place your cursor in the field you'd like to contain the results of your calculation.
2. From the menus, select **Tools, Area Estimator**.
3. Select the desired units (Feet/inches, meters, miles) from the **Units for sides** drop-down menu.
4. Select the units for the result (Sq feet, Acres, Sq meters, Sq miles, Sq kilometers) from the **Units for area** drop-down menu.
5. Enter the first measurement in the available box and press **Enter** or click **Add Side**.
6. Continue entering additional sides until all dimensions have been entered. The Estimated Area is calculated as you add sides and displayed in the **Estimated Area** box.
7. Click **OK** to place the calculated area into your form.
    - If you make an error in one of the dimensions, click **Clear all sides** to start over.
    - At any time, you can select different **Units** for area.

## Square Footage Adjuster

The Square Footage Adjuster allows you to easily adjust for differences in the square footage of all comparables in one easy step.

1. Ensure that the sales price and square footage for all comparables have been entered.
2. Then, in the Forms PowerView or Comps PowerView, click **Tools, Square Footage Adjuster** from the menus.




3. The first section of the Square Footage Adjuster shows you the methods available for calculating the adjustment. Choose the method you want to use for your calculation and set the parameters that determine if the adjustment is relevant, the SF Adjuster shows you the resultant net/gross percentages as they appear on the form.
4. Click **OK** to merge the adjustment figures into the current report.

If for some reason, you must change the square footage of a comparable, be sure to reload the SF Adjuster so that it can recalculate the adjustments.

## Math Calculator

You can now do basic math operations using WinTOTAL's Math Calculator so that you can drop those calculations into your report. By running this option, a basic calculator appears on your screen to help you quickly calculate most common calculations as your build your appraisal. In addition, WinTOTAL's Math Calculator can accept basic Excel-like formulas to help you make your calculations more easily. To perform calculations and insert them into your report...

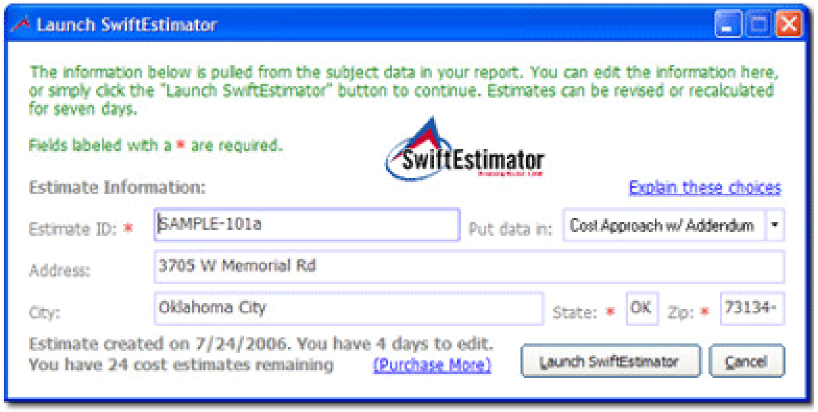
1. Anywhere in WinTOTAL, find the field into which you want to insert your calculation and click to select it.
2. Click **Tools**, **Math Calculator** from the menus.
3. Use the basic calculator functions to determine a value OR enter an Excel formula into the bottom text box and click **Eval**.
4. If you're satisfied with the value you've calculated, indicate whether you want to keep the calculator open after you insert the value into your field by checking the box at the bottom and then click **Insert** to add it into the selected field.

## Marshall & Swift Cost Estimates

WinTOTAL now integrates directly with Marshall and Swift's online estimation product, SwiftEstimator™. SwiftEstimator™ automates cost data searches, calculations and data entry on appraisal forms - letting you easily create a detailed Cost Approach without even having to pay an annual subscription fee for cost data. For more information on SwiftEstimator™, click here. If you prefer to use the Marshall & Swift approach to cost estimates, you can take advantage of this integration via the **Tools** menu. To run a cost estimate...

1. From anywhere in WinTOTAL, click **Tools**, **Launch SwiftEstimator™**.




2. In the screen that appears, a summary of the data from your report that you wish to submit to Marshall & Swift appears along with a statement of your total remaining cost estimates, the remaining number of days you have to recalculate an existing estimate for your report, and a choice of form to use for the final estimate. First, verify that all required information (denoted with a red asterisk) has been filled out and fill in any remaining gaps.

   **Note**: Due to limitations in SwiftEstimator™'s integration tools, the square footage, client, and appraiser fields cannot be transferred into your Marshall & Swift Cost Estimate at this time.

3. Next, choose a type of estimate you wish to use. Options are:

   - **Cost Approach w/ Addenda –** Runs a standard report and transfers the data to both the Cost Approach section of your major form and into a special cost approach addendum created by WinTOTAL.
   - **Cost Approach Only** – Runs a standard report and transfers the data into the Cost Approach section of your major form only.
   - **Marshall & Swift 1007 LGL –** Runs your cost estimate and inserts the resulting 1007 into your report as a legal sized form. Keep in mind that when you select this option, the cost estimate is NOT transferred into the cost approach section of your major form.
   - **Marshall & Swift 1007 LTR –** Runs your cost estimate and inserts the resulting 1007 into your report as a letter sized form. Keep in mind that when you select this option, the cost estimate is NOT transferred into the cost approach section of your major form.

   **Note**: Each of these options adds a copy of the cost estimate to the workfile automatically so that you can keep an original copy around as required by USPAP. If a revision to your estimate is required later, the SwiftEstimator™ integration again copies the update to your workfile with a time and date stamp so you can track and verify the history of the report.

4. Finally, click **Launch SwiftEstimator™** to begin your cost estimate through Marshall & Swift's online tool.

   **Note**: You must have available cost estimates in your a la mode account in order to launch the SwiftEstimator™. If this screen indicates that you have no available cost estimates, click **Purchase More** to buy the necessary number of cost estimates before proceeding.

5. When the SwiftEstimator™ appears, fill out the required property details for your cost estimate. For additional information or assistance using the SwiftEstimator™, click the **Help** link in the upper right corner of the screen.
6. Since Marshall & Swift currently limits the automatic upload of data from your report to basic subject address information, a **Data Lookup** sidebar appears on the left with information from your report. To copy this information into our Windows clipboard so you can paste it into SwiftEstimator™, click the **Copy** link beside the desired information. Then, just paste it in as you would anything else.
7. When the details of your Cost Estimate are complete, you arrive at the **Reports/Calc** section of the SwiftEstimator™. A brief overview of your data is supplied. Review the data you see and make any adjustments to the data before proceeding.
8. When you're satisfied with your data, click **Calculate** to determine your cost estimate.

**Note**: One cost estimate is deducted from your account when you click **Calculate**. If you determine that adjustments must be made to your cost estimate, you have 7 full days after your first cost estimate is generated (when you first click **Calculate**) to recalculate your cost estimate free of charge. As you continue to work with the cost estimate, WinTOTAL displays the number of days you have left to recalculate. After 7 days, another cost estimate is deducted from your account when you attempt to recalculate.

9. When the calculation is complete, the results appear in the same window, but you can always see the entire report (whether Standard or a 1007) by clicking **Preview**.
10. If you need to make any adjustments to your cost estimate, you can do so now or you can return at a later time (before the end of your 7 day grace period). To recalculate your cost estimate, simply launch the SwiftEstimator™ tool in WinTOTAL, make any necessary changes, return to the **Reports/Calc** step of the SwiftEstimator™, and click **Calculate** again.
11. When you are satisfied with your cost estimate, click **Transfer to WinTOTAL** to move the estimate into WinTOTAL.
12. When you return to WinTOTAL, you may be prompted about adding the new data to your report. If you receive a prompt, click **Yes** to confirm that you want to add the new cost estimate to your report.

Your cost estimate is immediately added to your report.

## Property Presentations

As the appraisal industry evolves, the savvy appraiser is always on the lookout for new ways to market appraisal services to different audiences. One often overlooked segment of the real estate market is the "For Sale By Owner" or FSBO home seller. These individuals are often marketing their homes without the benefit of a real estate agent to help them establish the value of their homes. Enter the appraiser.

XSites include a feature which allows you to help FSBOs market their homes and justify their asking prices. Specifically, once you've completed an appraisal for a FSBO customer, you can upload that appraisal to your XSite. A custom URL is created on your XSite, which home sellers can pass along to perspective buyers. When a buyer views the site, they see the following:

- Summary of the professional appraisal report
- Link to download the full appraisal report
- Beautiful Flash-animated listings brochure
- Unlimited, full-color photos (provided by you during your inspection)
- Virtual tour
- Online map


## Creating the Presentation

To create an Online Property Listing…

1. Open the desired report in WinTOTAL and click **Tools**, **Property Presentation Wizard** from the menus.
2. In the login screen, enter your XSite **Username** and **Password**, and then click **Next**.

3. The **Additional Information** screen appears, allowing you to enter specific information about the property which may not be included in the appraisal report, but would be beneficial in marketing this property to buyers. Fill out any or all of the fields for which you have information and click **Next**.
4. Give a description of the property and click **Next**.
5. Specify how much, if any, of the report you'd like to include on your site. To include a PDF of the entire report, mark the **Print the entire report to PDF** option. To select certain pages, instead choose **Print specific pages**. Click **Next** to continue.
6. You're given the option of uploading any photos from the report to your XSite. Check the box for the photos you wish to include. If you have additional photos from your inspection that aren't included in the report, click **Add additional photo**. Find the photo file on your hard drive and click **Open**. Repeat this step to add additional photos. Click **Next** to continue.
7. Select the XSite you wish to upload this report to from the **Your XSite** drop-down menu. In the **Path to presentation** box, type the URL which you'd like the homeowner to use. For example, you might type the property address.
8. Complete the **Client's Name** and **E-mail address** fields to automatically generate a Disclosure Agreement form. The client completes this form to grant you permission to display the report on your site. Click **Next** to continue.
9. The wizard now generates the report. If you opted to include only a portion of the report, the standard WinTOTAL **Print** screen appears allowing you to select which pages are printed. Make your selections and click **OK**.
10. Once the report is generated, you're prompted to preview the site. Click the link to open a window and ensure that the information is correct. Click **Next** to continue and then click **Finish** to complete the process.

### Publishing the Presentation

Once the report is complete, you must return to your XSite to enable it. Before doing so, you should contact your customer and ensure that they received the electronic End User Agreement and are willing to accept the terms. They're prompted to visit the site online and complete an acceptance form. Once this is done, you're ready to launch the property report on your XSite.

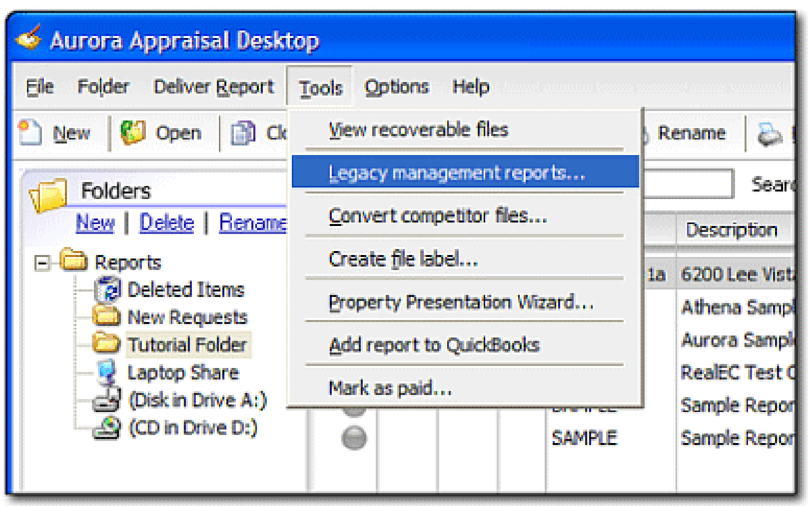
1. Log into your XSite and click the **XSite** in the toolbar at the top.
2. Click **Online Properties** in the **Content** pane on the left.
3. The reports you've uploaded from WinTOTAL are displayed in the **Online Properties** window. Click **Preview** to look at the site. If your site's "File Not Found" message is displayed, the home owner has not yet completed their acceptance form. Once they do so, the site should display properly.
4. As necessary you can manipulate this online property:
   - Check the box to the left of the property name to enable this page.
   - Click **Delete** to remove it from your site.

- o If you need to adjust the URL address you entered earlier, click **Edit URL**.

Your customer's property is now available online to assist in marketing their home. Note that it is not viewable from your XSite, unless you choose to add the link to either a menu item or to a custom page.

## Legacy Management Reports

If you've upgraded your former Athena generation of WinTOTAL, you can still use the legacy Athena management reports that helped you manage your billing data using Aurora. To access your old billing data, from the Appraisal Desktop, click **Tools**, **Legacy management reports**. From there, usage is the same as in Athena.




## Convert Competitor Files

If you've come to WinTOTAL from a 3rd party formfilling application, chances are you've got a wealth of data locked up your old appraisals files. Luckily, WinTOTAL has the key to unlock that data. To convert your old appraisal files...

1. Anywhere in WinTOTAL, click **Tools Convert Competitor Files** from the menus to launch the **WinTOTAL Conversion Wizard**.
2. From the drop-down menu, select the format for the files you'd like to convert.
3. Depending upon the format you choose, one or more options may appear at the bottom of the screen. These show the resources that WinTOTAL is able to convert in addition to report files. For example, in some formats, WinTOTAL can import comparables, photos and text databases (canned comments). Check each box for the items you wish to convert, and then click **Next**.
4. If you did not select options other than just appraisal reports in the previous step, skip to the next step. Otherwise, you may see up to four settings here depending on the items you indicated you wanted to convert. For each setting, click **Browse**, navigate out to the appropriate file from your old software and click **Open** to accept the file.
5. Now, click **Browse** to navigate out to the folder containing the reports from your old software. Navigate out to that folder, click it, and click **OK** to select it.
6. Select a WinTOTAL folder in which to store the converted files. You can either click the drop-down menu to select an existing folder or create a new folder

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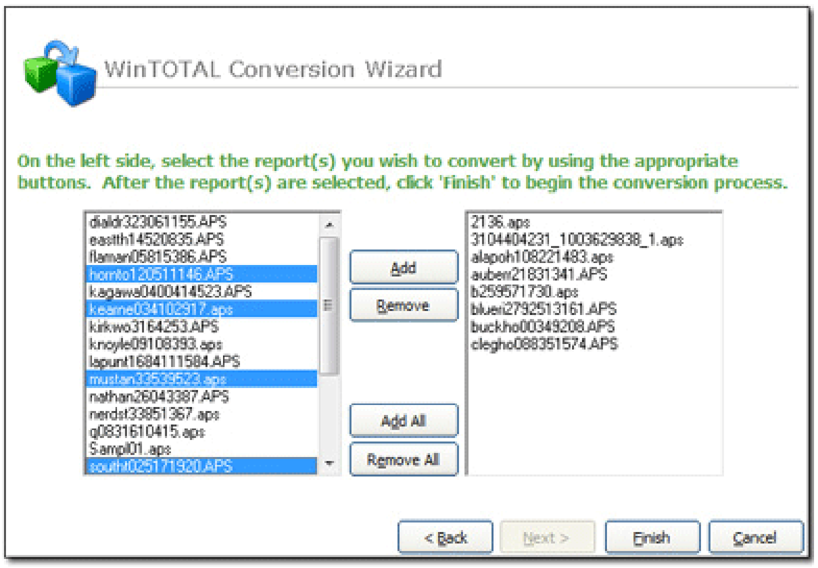
for your converted files by clicking **New**, typing a name, and clicking **OK**.

7. Click **Next** to continue.
8. The wizard presents a warning about the imperfect nature of file conversion in general. Read the warning and click **Next** to continue.
9. WinTOTAL then scans the selected directory on your system and displays any reports found in a list. Select the report(s) you'd like to convert from the list on the left and click **Add**. Or, click **Add All** to select all the reports displayed.




10. Click **Finish** to launch the conversion process.
11. When the conversion is complete, WinTOTAL notifies you with a summary of the results. Just click **OK** and launch WinTOTAL to find your newly converted content.

**Note**: Be aware that file conversion may take some time. If you have hundreds of reports, it is strongly recommended that you convert them in smaller batches.

When you next return to the File Cabinet, your converted files should be displayed in the appropriate folders. Likewise, if you converted any other items, they also appear when you next access the **Files** PowerView

## Collaboration

For security purposes and to prevent pirating of your data, WinTOTAL limits its XML export to files that were created with your same customer number. The message that appears when you try reads, "The report could not be converted because it was created with a copy of WinTOTAL not registered to you."

If you want to export XML from a file created on another appraiser's computer, you must first receive an "authorization" from that appraiser in the form of an "authorization file". This document shows how the authorization is created and installed.

WinTOTAL currently supports one (1) additional authorization. If you need to authorize files created by additional appraisers, contact us at 1-800-252-6633.

Enabling WinTOTAL's collaboration features is a two-step process.

1. The 2nd party creates the authorization file and then gives it to you via disk or e-mail.
2. Then, you "install" this file into your copy of WinTOTAL.

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### Creating & Sending Authorization Files

If you need to grant permission for another WinTOTAL user to deliver your reports through WinTOTAL's XSite Network plugins…

1. Anywhere in WinTOTAL, click the Options menu and select **Allow another XSite user to convert my reports…** An e-mail message opens pre-filled with instructions and a subject line of "XSOM Authorization File attached" and an attached file named according to the customer number with an extension of WAF. (ex: 8002526633.WAF)
2. Enter the recipient's e-mail address and click **Send**.

### Installing Authorization Files

To install an authorization file you've received so that you can deliver reports created by that appraiser…

1. Make sure your PC has the WinTOTAL updates before installing the authorization file.
2. Open the e-mail message with the WAF attachment and double-click or "run" the attachment.

WinTOTAL automatically opens and registers the authorization. When successful, you see a message on screen telling you.


## Associate XSite Orders

While WinTOTAL's XSite synchronization tools are designed to notify you any time you attempt to download a new order that you've already started in WinTOTAL, you may find times where you need to associate the two so you can deliver the report to the appropriate client. If you need to associate your existing report with an order from your XSite…

1. From inside the report you wish to associate with an XSite order, click **Tools**, **Associate XSite Order** in the menus.
2. In the list of orders that appears, find the order you wish to associate with this report and click to select it. If you can't find the order in the list, you may need to mark the **Show all orders** option to find it.
3. Click **OK** to continue.
4. A window appears prompting you to delete the original order file so that you do not confuse the two in the future. For best results, we recommend that you delete the original order. Click **Yes** to delete it or click **No** if you wish to keep it.

## Roll Back to Athena

While the Aurora version of WinTOTAL contains all the latest features, updates and upgrades to help you stay productive in your appraisal business, we provide the option for you to "roll back" to the previous Athena version of WinTOTAL if you wish. This "lite" version of WinTOTAL will continuously receive updates and support as the industry changes and may be the more comfortable tool for those who have become familiar with it. If you're considering the possibility of rolling back to Athena, consult our Roll back FAQ for more details or our Rollback Tech Doc for detailed instructions on this process.

- Rollback FAQ (4997)
- Rollback Tech Doc (4999)

To initiate the rollback process…

1. Open the Appraisal Desktop.
2. From the **Tools** menu, click **Rollback to Athena**.