

# TOTAL

## QuickStart Guide

### TABLE OF CONTENTS

Installation and setup . . . . .	p.2
Appraisal Desktop. . . . .	p.4
Forms . . . . .	p.6
Navigation	
QuickLists and recent responses	
Side-by-Side PowerView . . . . .	p.8
Signing reports . . . . .	p.9
Signature creation	
Sign report	
Report delivery . . . . .	p.10
Save XML and PDF to computer	
Deliver XML and PDF via DataCourier	
Deliver report via TOTAL Connect plugin	
Additional resources. . . . .	p.13

2512 Briar Ridge Road - TOTAL by a la mode

File Edit View Forms Tools Data Deliver Help Assignment Forms Side-by-Side Photos Sketch Addenda Worksheet

QuickList

Double-click or use ALT+# to insert

0 < New >

Math Calculator

Decimals: 2

Report Contents

- Cover Page
- Multi-Purpose Supplemental Addendum
- Multi-Purpose Supplemental Addendum
- Multi-Purpose Supplemental Addendum
- Invoice
- Table of Contents
- GLB Act Privacy Notification
- USPAP Identification
- Summary of Salient Features
- URAR [Page 1]
- URAR [Page 2]
- URAR [Page 3]
- URAR [Page 4]
- URAR [Page 5]
- URAR [Page 6]
- Additional Comparables 4-6
- Supplemental Addendum
- Market Conditions Addendum to the
- UAD Definitions Addendum [Page
- UAD Definitions Addendum [Page
- UAD Definitions Addendum [Page
- Subject Photos
- Subject Photos Interior
- Subject Photos Interior

UAD Guidance: Currency, whole dollars only

### Uniform Residential Appraisal

The purpose of this summary appraisal report is to provide the lender/client with an accurate, and adequately

Property Address 2512 Briar Ridge Rd City Naples

Borrower Chuck Fischer Owner of Public Record Drogan, Shane &

Legal Description SHORES OF SUNNY BEACH LOT 7

Assessor's Parcel # 00-2S-22-0584-1020-0063 Tax Year 2020

Neighborhood Name Shores of Sunny Beach Map Reference 188

Occupant ☒ Owner ☐ Tenant ☐ Vacant Special Assessments \$ 0

Property Rights Appraised ☒ Fee Simple ☐ Leasehold ☐ Other (describe)

Assignment Type ☐ Purchase Transaction ☐ Refinance Transaction ☐ Other (describe)

Lender/Client Henshaw Group, llc Address 2328 N Monticello Ave, Nap

Is the subject property currently offered for sale or has it been offered for sale in the twelve months prior to the effective

Report data source(s) used, offering price(s), and date(s).

I ☐ did ☐ did not analyze the contract for sale for the subject purchase transaction. Explain the results of the analy

performed.

Contract Price \$2,900,000 Date of Contract 11/19/2012 Is the property seller the owner of public record?

Is there any financial assistance (loan charges, sale concessions, gift or downpayment assistance, etc.) to be paid by a

If Yes, report the total dollar amount and describe the items to be paid.

Note: Race and the racial composition of the neighborhood are not appraisal factors.

Neighborhood Characteristics			One-Unit Housing Trends				
Location	<input type="checkbox"/> Urban	<input checked="" type="checkbox"/> Suburban	<input type="checkbox"/> Rural	Property Values	<input type="checkbox"/> Increasing	<input checked="" type="checkbox"/> Stable	<input type="checkbox"/>
Built-Up	<input checked="" type="checkbox"/> Over 75%	<input type="checkbox"/> 25-75%	<input type="checkbox"/> Under 25%	Demand/Supply	<input type="checkbox"/> Shortage	<input checked="" type="checkbox"/> In Balance	<input type="checkbox"/>
Growth	<input type="checkbox"/> Rapid	<input checked="" type="checkbox"/> Stable	<input type="checkbox"/> Slow	Marketing Time	<input type="checkbox"/> Under 3 mths	<input checked="" type="checkbox"/> 3-6 mths	<input checked="" type="checkbox"/>

Neighborhood Boundaries The subject neighborhood is bounded on the North by Edmond Road, o

East by Santa Fe Avenue, on the South by 15th Street, and on the W by the Edmond city limits.

Neighborhood Description See additional comments on page 3.

Subject Contract Neighborhood Site Improvements Sales Comparison Sales History Reconciliation Additional Comments Cost Approach Income PUD

# Installation and setup

*Note: To log into your account, you need the e-mail address and password associated with the account. Use the "Forgot password?" link if you need to reset your password.*

## Installation

If you're a new customer, go to [www.alamode.com/TOTAL](http://www.alamode.com/TOTAL) to learn more about our software and to purchase your copy. Or, contact a member of our Sales team at (800) 252-6633.

If you're an existing customer, simply download a copy of TOTAL from your account at [www.myalamode.com](http://www.myalamode.com), click **Download Products** on the left, and click the **Download** link next to TOTAL.

Once you've downloaded TOTAL, run the installer. Enter your e-mail address and password to complete product registration. Go to [alashort.com/installTOTAL](http://alashort.com/installTOTAL) to watch a step-by-step video of the installation.

*Enter your e-mail address and password*

TOTAL Installer

### Product Registration

**TOTAL**

1. Register
2. Installation Type
3. Agreement
4. Configuration
5. Confirm
6. Install
7. Complete

Register TOTAL so that your company's name appears on all of your reports. You can change registration later by selecting Register in TOTAL's Help menu.

Register using:

- ☐ Existing WinTOTAL Aurora user (Recommended)
- ☒ a la mode login
- ☐ Activation code

Enter your a la mode Username and Password.

Username (e-mail):

Password:

[Forgot Password](#)

# Installation and setup

## Setup

When opening TOTAL for the first time, you're prompted to create a user.

1. Fill out your name, account information, and login credentials. Then, click **OK**.
2. Select the user you just created and enter the associated password.
3. Click **OK** to log in. You can also set TOTAL to remember your password or sign in automatically to bypass this screen the next time you open the program.

The image shows two overlapping windows from the TOTAL software. The background window is titled 'Create New TOTAL User' and contains a green message: 'The information entered here is used to help you instantly complete sections of your report. We've prefilled this data from your account. Please update any information that is incorrect or missing, then click OK to begin using TOTAL.' It has three sections: 'Your Information' (with fields for First Name: Michael, Last Name: Smith, E-mail: Michael.Smith@SmithAppraisal.biz, Phone: (312) 958-2242, Alt. Phone: (312) 958-2242, Website:), 'Company Information' (with fields for Company Name: Smith Appraisal, Address: 2512 Briar Ridge Road, City: Naples, State: FL, Zip: 341), and 'Login Information' (with fields for Password, Verify, Security Question: What is your a la mode customer number?, and Security Answer:). A blue circle with the number '1' is next to the 'Your Information' section. The foreground window is titled 'Select or Create TOTAL User' and contains a green message: 'Log in to TOTAL by selecting your user and clicking OK. To update user data, select the user and click Edit. Click Add to add another user.' It has a list box with 'Michael Smith' selected, buttons for 'Add', 'Edit', and 'Delete', a 'Password:' field with masked characters and a 'Forgot?' button, checkboxes for 'Remember my password' and 'Sign me in automatically', and 'OK' and 'Cancel' buttons at the bottom. A blue circle with the number '2' is next to the list box, and a blue circle with the number '3' is next to the 'OK' button.

# Appraisal Desktop

TOTAL's Appraisal Desktop is your report management system and starting point when opening the program. It provides an at-a-glance look into your files by displaying pertinent report information in customized folder structures instead of a simple list of file names.

From the Appraisal Desktop you can:

**Create and delete reports.** (Callout pointing to the File Manager tab)

**Use the Learning Center tab to access additional resources.** (Callout pointing to the Learning Center tab)

**Sync with TOTAL for Mobile on a mobile device.** (Callout pointing to the Mobile Sync button)

**Create folders for report organization.** (Callout pointing to the Folders pane)

**Search for and sort reports.** (Callout pointing to the Search bar in the Reports table)

**View files stored in Titan Drive at a glance.** (Callout pointing to the Titan Drive folder in the Folders pane)

**Use SmartFilters for order management and tracking.** (Callout pointing to the SmartFilters section in the Folders pane)

**Preview reports, view file history, and add to your WorkFile in the Info Pane.** (Callout pointing to the Info Pane at the bottom)

**Appraisal Desktop - TOTAL by a la mode**

**File Manager** | **Contacts** | **Marketing** | **Learning Center**

New | Open | Print | Move/Copy | Rename | Delete | Deliver | Share | Mobile Sync | Send to Titan Drive | Mark as Paid | Timeline | Copy Grid Data | Categorize

**Folders**

- Titan Drive
  - My Reports
    - 2017
    - 2018
    - 2019
  - Shared Reports
  - Deleted Items
  - SmartFilters
    - Accounting
      - Unpaid (\$1,825)
        - Last 30 Days (\$0)
        - 31-60 Days (\$0)
        - 61-90 Days (\$0)
        - Over 90 Days (\$575)
        - All Unpaid (\$1,825)
      - Paid (\$0)
        - Last 30 Days (\$0)
        - 31-60 Days (\$0)
        - 61-90 Days (\$0)
        - All Paid (\$0)
    - Titan Drive (38% Protected)
      - Protected Files (9)
      - Newer Local Files (15)
      - Newer Cloud Files (0)
      - Unprotected Files (0)

**Reports**

Search ... | Current View | Advanced

Vault	Category	File No.	Borrower Name	Report Description	City	State	Major Form	Inspe
				1004 [Template]			URAR	
		NAS-261841-4202-1	Andy Brennan	107 Grassy Lake Rd	Minneola	FL	URAR [UAD Version]	04/09
		AAI-261932-3182-1	Gordon Cole	11630 Purple Lilac Cir	Orlando	FL	URAR [UAD Version]	03/25
		NAS-150008-0300-1	Margaret Lanterman	1247 Legendary Blvd	Clermont	FL	URAR [UAD Version]	03/30
		NAS-262141-1599-1	Matthew Stahl	1302 E 9th Ave	Mount Dora	FL	URAR [UAD Version]	04/05
		09049728	Norma Jennings	14808 Algardi St	Montverde	FL	URAR [UAD Version]	02/27
		AAI-262216-3378-1	Pete Martell & Catherine Martell	1701 Cobble Ln	Mount Dora	FL	URAR [UAD Version]	03/12
		NAS-261014-39939-1	Phillip Jeffries	1785 Carolina Ct	Tavares	FL	URAR [UAD Version]	04/08
		261833-2592-1	Sabrina Silotto	2333 Golden Aster St	Clermont	FL	URAR [UAD Version]	02/24
		72314897	Will Hayward	2403 Sabastian St	Mount Dora	FL	URAR [UAD Version]	03/01
		NAS-261534-1032-1	Ed & Nadine Hurley	262 Hammock Ct	Davenport	FL	URAR [UAD Version]	04/24
		AAS-46281150221	Jimmy & Kathy Parker	2850 Southland Rd	Mount Dora	FL	URAR [UAD Version]	04/22
		72252071	Leo Johnson & Shelly Johnson	2976 Langdon Ln N	Kissimmee	FL	URAR [UAD Version]	03/07

**2512 Briar Ridge Road**

Details | To Do | Invoice | Order | Workfile | History | Preview

Print

**Address:** 2512 Briar Ridge Rd

**Opinion of Value:** 253000

**Effective Date:** 6/26/2020

**Signed Date:** 6/26/2020

**Last Modified:** 6/26/2020 10:09:12 AM

**Cloud File Date:** 6/26/2020 2:46:34 PM

**Bill To:** Henshaw Group, llc

**Borrower:** Andy Brennan

**Total Fee:** \$625.00

**Total Paid:** \$0.00

**Amount Due:** \$625.00

13 reports (1 selected)

# Appraisal Desktop

If you're moving from another software provider, we have a conversion plugin to help you save time while switching over to TOTAL.

Learn how to import ACI reports into TOTAL: [alashort.com/importfilesACI](http://alashort.com/importfilesACI)

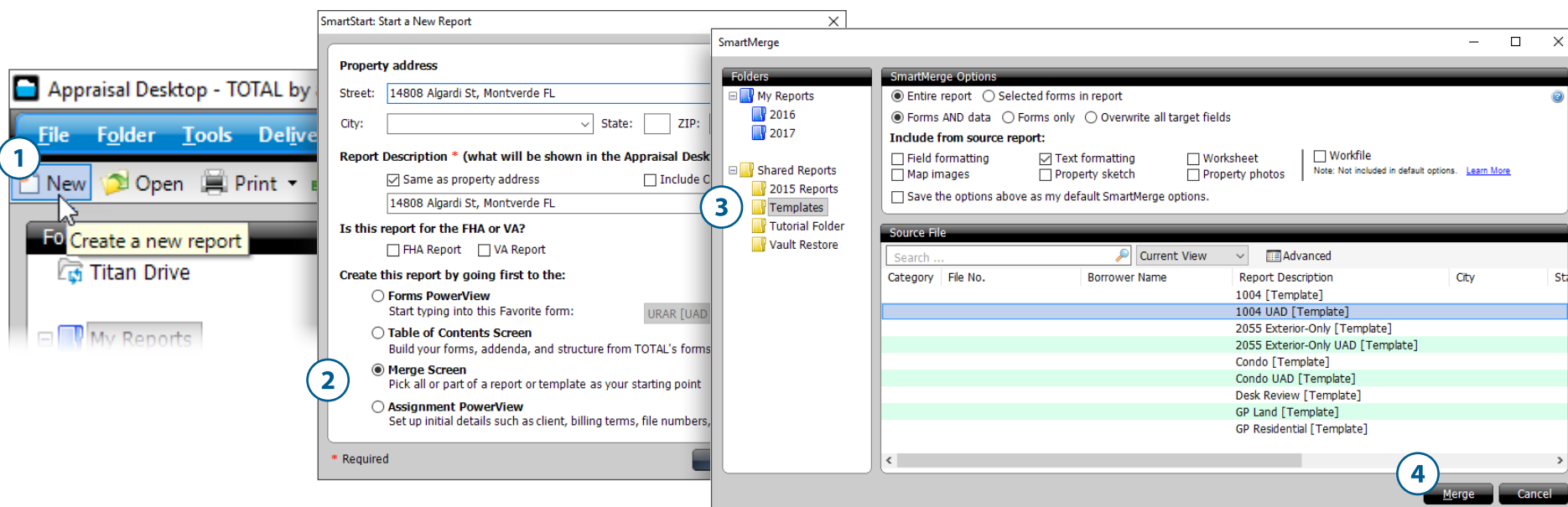
See how the conversion plugin works: [alashort.com/competitorconvert](http://alashort.com/competitorconvert)

## Start reports (from a template)

To start a new report using a template:

1. Click the **New** (📄) icon in the upper left.
2. Fill out the property address and report description in the **SmartStart** screen. Then, choose the **Merge Screen** option and click OK.
3. From the **SmartMerge** window, choose the **Templates** folder on the left. This is a folder that comes with our software, and includes empty templates for popular report types. These templates can be customized to suit your needs.
4. In the **Source File** pane, select the template you want to use. Then, click **Merge**.

For more information on starting a new report, watch the video: [alashort.com/startnewreport](http://alashort.com/startnewreport)





# Forms

## Navigation

Your form-filling tools are located in the Forms PowerView, where most of your data entry is done. Here, you can:

Use **QuickLists** and **Recent Responses** to quickly fill out common fields in your report.

Select a form from the **Report Contents** panel to jump to that form in your report.

Use the **single scroll view** to seamlessly move from one page to the next. You have the option to switch from a vertical to horizontal scroll.

Add and remove forms easily by using the **Contents** button in your toolbar.

The screenshot displays the TOTAL software interface for a Uniform Residential Appraisal Report. The top menu bar includes File, Edit, View, Forms, Tools, Data, Deliver, and Help. The toolbar contains various icons for navigation and editing, including a 'Contents' button. The sidebar on the left features a 'QuickList' panel with a list of report sections and a 'Report Contents' panel with a list of report pages. The main window shows the appraisal report form, which includes sections for 'SUBJECT', 'CONTRACT', 'NEIGHBORHOOD', and 'SITE'. The 'SUBJECT' section contains fields for Property Address, City, State, Zip Code, County, and various other details. The 'CONTRACT' section includes fields for Contract Price, Date of Contract, and other contract-related information. The 'NEIGHBORHOOD' section includes fields for Neighborhood Characteristics, One-Unit Housing Trends, and Present Land Use. The 'SITE' section includes fields for Utilities, Public, Other (describe), and various other site-related details. A zoom level of 125% is indicated at the bottom right of the window.

Adjust the **zoom** level, fit forms to the width or height of your window, or collapse your forms.

To learn more about report navigation, check out our video at [alashort.com/navigateTOTAL](http://alashort.com/navigateTOTAL)

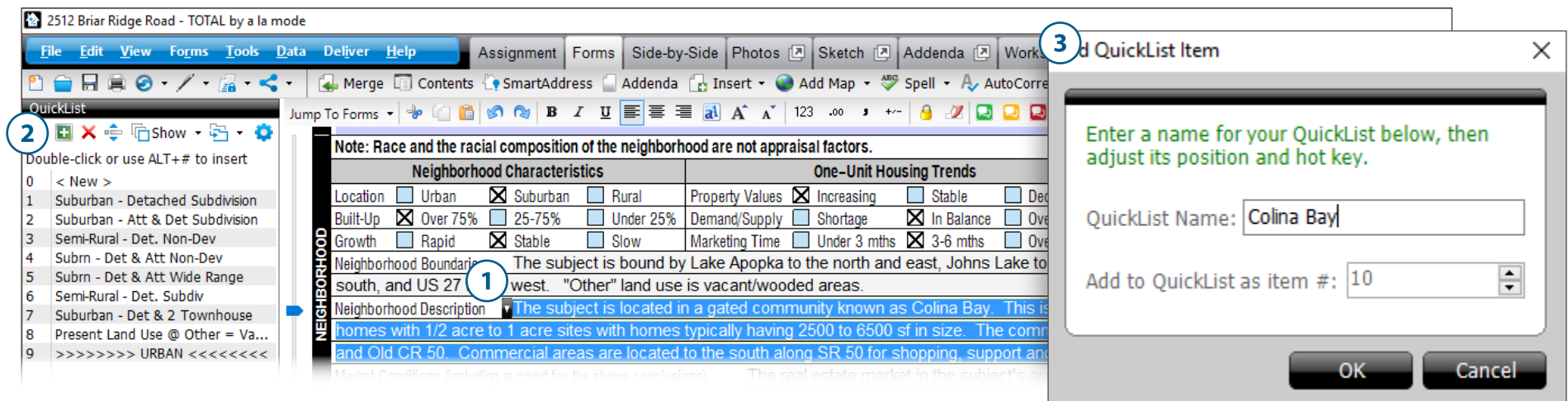
# Forms

**Recent Responses** are field-specific and display your 10 most recent entries as a drop-down in the fields as you move through the report, saving you time from entering the same terms and phrases.

## QuickLists and Recent Responses

QuickLists store commonly used terms and phrases for your reports — similar to “canned comments” — and are one of the largest time-saving features in TOTAL. These can be displayed in the left-hand pane as a comprehensive text database, or filtered to display field-specific items as you move through the report. To add a QuickList entry:

1. Highlight the text in the report field.
2. Press **Alt + 0** on your keyboard or the **plus icon (+)** in the menu to add the highlighted text as a new QuickList entry.
3. Give the QuickList entry a name you can easily reference, and then click **OK**.



To use an existing QuickList entry, double-click the item from the QuickLists pane on the left. Or, press the **Alt** key and the corresponding number from the list. For more information on creating and using QuickLists, watch our video: [alashort.com/createQuickLists](http://alashort.com/createQuickLists)

# Side-by-Side PowerView

With the Side-by-Side PowerView, manage your comps, listings, and rentals in-line with each other. From here, you can:

Use **SmartAdjust** to make adjustments easily and quickly.

**Import** comparables from old reports or an MLS text file.

Choose to **sort comps** by weight, proximity, GLA, or other factors.

The screenshot displays the TOTAL Side-by-Side PowerView interface. The top menu bar includes File, Edit, View, Forms, Tools, Data, Deliver, and Help. Below the menu is a toolbar with various icons for actions like Assignment, Forms, Side-by-Side, Photos, Sketch, Addenda, Worksheet, E&O, Workfile, Notes, and Dashboard. The main area shows a list of properties, each with a thumbnail, address, and details. The left sidebar contains a QuickList with a double-click or ALT+# to insert option. The bottom section shows a detailed view of a property, including its address, neighborhood, and various adjustment factors.

**Drag and drop comps directly on the page to rearrange their order.**

Property	Address	Neighborhood	Source	Price	Gr %	Ind	Weight
Subject	2512 Briar Ridge Rd	Shores of Sunny Beach	Typed	\$2,900,000	6.4	\$2,830,039	17.30
Sale #2	4702 Ocean Blvd	Naples, FL 34102	Typed	\$2,988,000	6.7	\$2,867,500	17.17
Sale #3	4772 Ocean Blvd	Naples, FL 34102	Typed	\$2,500,000	7.7	\$2,829,965	16.75
Sale #4	4727 Ocean Blvd	Naples, FL 34103	Typed	\$3,000,000	10.5	\$3,357,604	15.57
Sale #5	2962 Scenic Highway 98	Naples, FL 34101	Typed	\$3,750,000	11	\$2,888,463	15.36
Sale #6	2968 Scenic Highway 98	Naples, FL 34101	Typed	\$3,250,000	11	\$2,888,463	15.36


To learn more, view the TOTAL User's Guide article here: [alashort.com/workwithcomps](http://alashort.com/workwithcomps)  
 For more information on SmartAdjust, check out our video: [alashort.com/smartadjust](http://alashort.com/smartadjust)

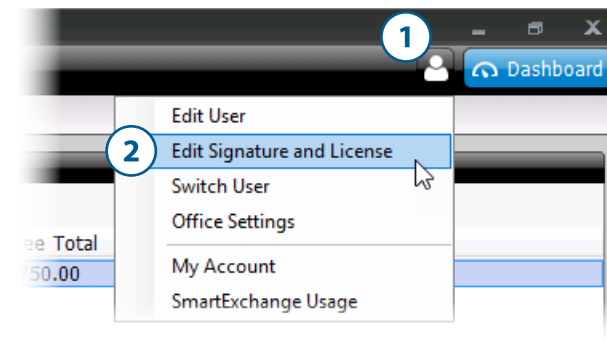


# Signing reports

## Signature creation

In order to sign your reports, you first need to set up your signature.


1. Click the **User profile menu button** (  ) in the upper right.
2. Select **Edit Signature and License** to get started.

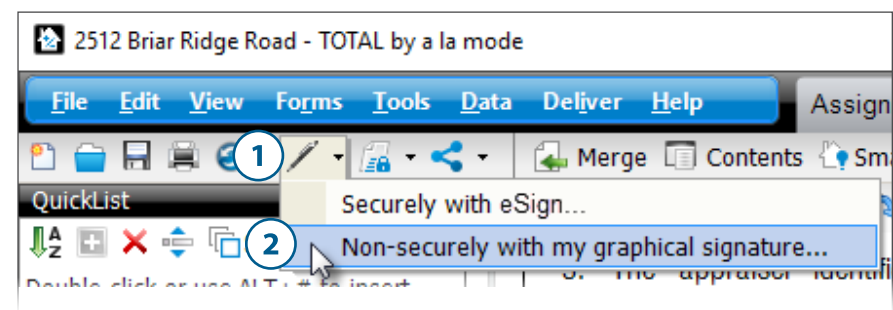


For step-by-step instructions, go to [alashort.com/setupsignatures](http://alashort.com/setupsignatures).

## Sign reports

TOTAL offers two options for signing reports: The more common method, using a graphical signature, and signing securely using eSign. To sign a report graphically:

1. Click the **drop-down next to the pen icon** (  ) in the upper left.
2. Select **Non-securely with my graphical signature**.
3. Choose your signature options in the **Sign Your Report** window and click **Sign**.



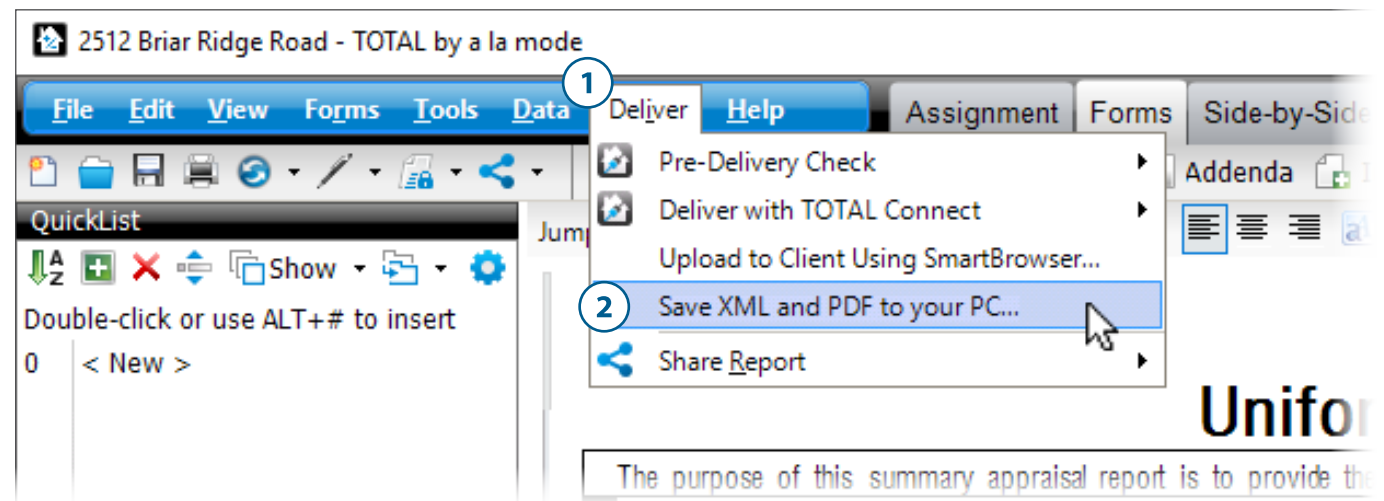
For more information on signing reports securely using eSign, view the article in the TOTAL User's Guide here: [alashort.com/signsecurely](http://alashort.com/signsecurely)

# Report delivery

## Save XML and PDF to your computer

To save a copy of your report and upload the file directly to a client's website:

1. Click **Deliver** in the upper left toolbar.
2. Select **Save XML and PDF to your PC**.
3. In the window that appears, select which pages you want to include in your PDF, and then click **Continue**.
4. Choose your save location and file name, acknowledge the XML notification, and click **Save**.

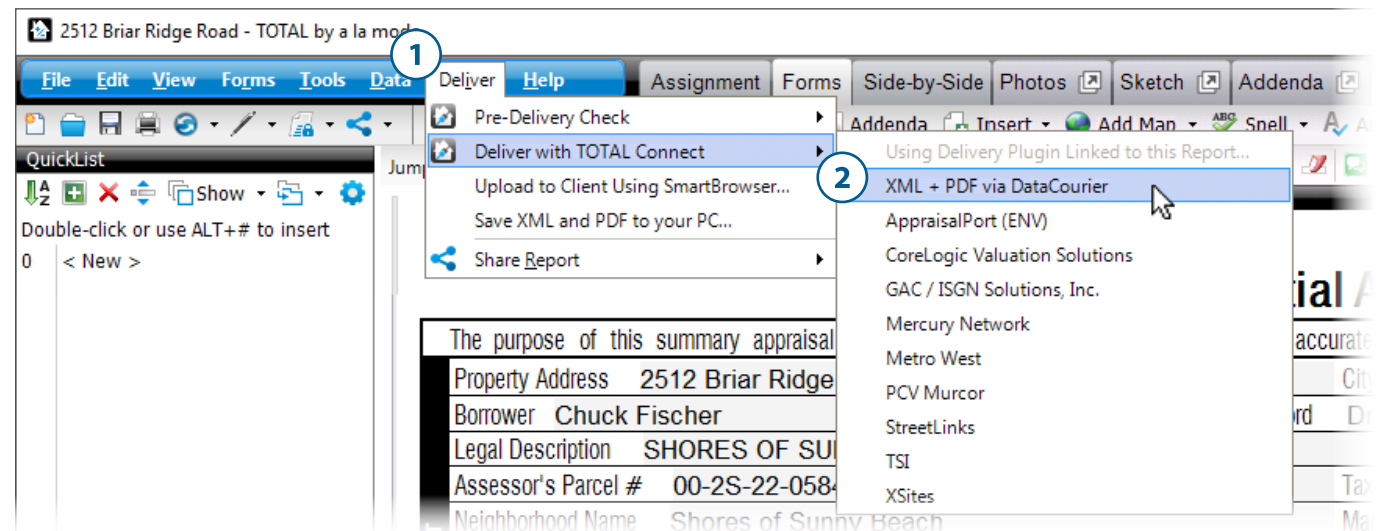


# Report delivery

## Deliver XML and PDF via DataCourier

If you need to e-mail your report to a client and need a compliant, secure way to deliver it, use our secure e-mail method:

1. Click **Deliver** in the menu on the upper left.
2. Select **Deliver with TOTAL Connect**, and then select **XML + PDF via DataCourier**.
3. In the window that appears, select which pages you want to include in your PDF, and then click **Continue**.
4. Log in to TOTAL Connect with your a la mode username and password.
5. In the delivery details window, verify the populated information is correct and enter a customized e-mail message to your client. Then, click **Send**.

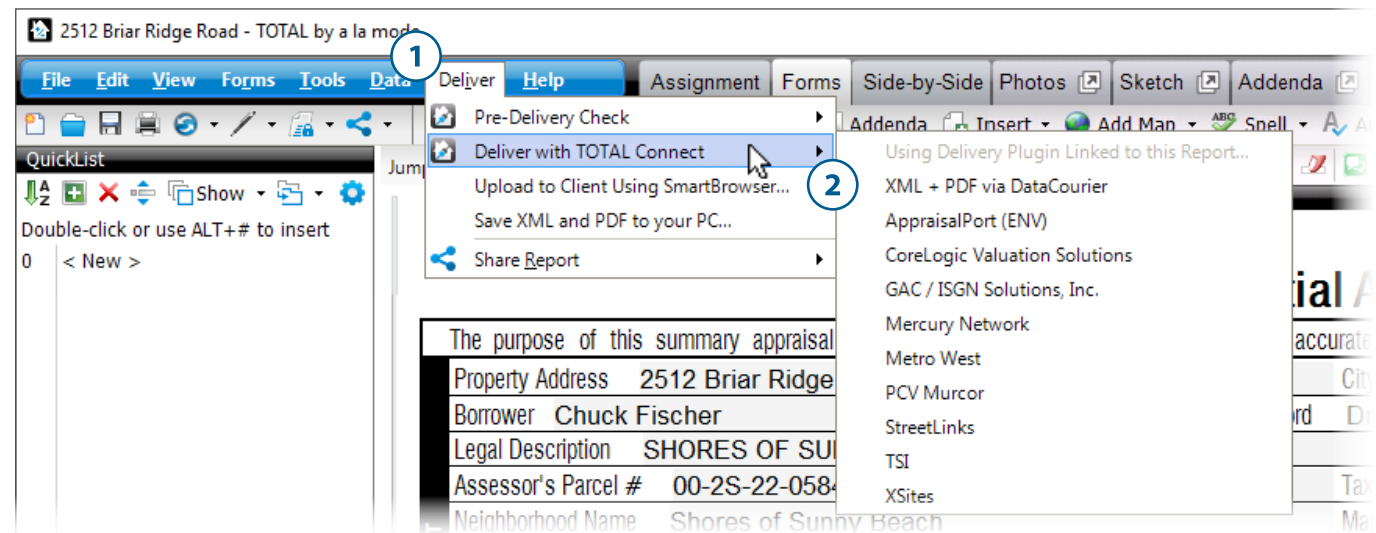


# Report delivery

## Deliver your report via a TOTAL Connect plugin

You also have the option to deliver directly to a participating client using our integrated plugins, including the AppraisalPort plugin for ENV (AI Ready) file creation.

1. Click **Deliver** in the upper left toolbar.
2. Select **Deliver with TOTAL Connect**, and then select the plugin associated with your client.
3. Follow the on-screen steps to complete the delivery.



While some of the delivery plugins are available free of charge, some require a TOTAL Connect Pro license. For more information about TOTAL Connect plugins, view the TOTAL Connect User's Guide article here: [alashort.com/2naF1dQ](https://alashort.com/2naF1dQ)

# Additional resources

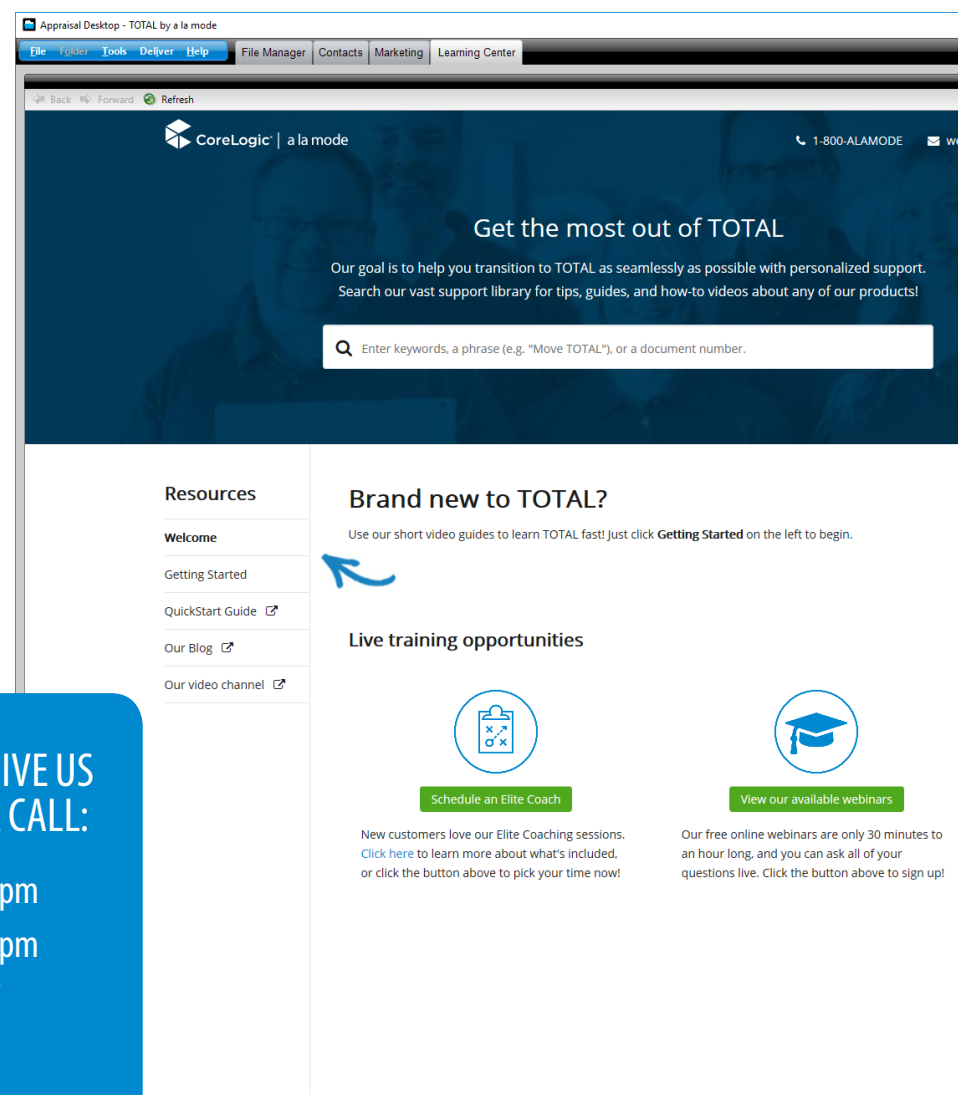
*Have more questions? Book your Welcome Call! You get two 45-minute training sessions with one of our Product Coaches for free.*

*Click [here](#), or visit [learn.alamode.com](https://learn.alamode.com) to schedule your one-on-one Welcome Call today! You can also click the chat button on the lower right of [learn.alamode.com](https://learn.alamode.com) for immediate assistance.*

Getting started with TOTAL is faster than ever with easy-to-access resources. Whether you like how-to videos, step-by-step instructions, or recorded webinars, our goal is to help you transition to TOTAL as seamlessly as possible.

For more information and additional resources, check out the Learning Center tab on the Appraisal Desktop in TOTAL, or visit [learn.alamode.com](https://learn.alamode.com). From there you can:

- Register for free, live webinars
- Watch training videos from our robust video channel and read step-by-step instructions from our support library
- Check out additional events and training classes
- Read valuable tips and tricks of the trade on our blog



## QUESTIONS? GIVE US A CALL:

Silver: 800-211-4511 | 8am-5pm

Gold: 800-211-4513 | 6am-9pm

Platinum: 800-211-4514 | 24x7