Vault & Exact

by a la mode

Vault & Exact

Vault & Exact

Getting Started

a la mode's Vault is the only online storage service specifically designed for use by appraisers. More than simply allocating space on our server, we also index key items from the files themselves to assist in your management of them. Your files are easily located in your private, secure storage area by address, date, map reference, legal description, file number, etc.

Vault checks your files for updates as often as you tell it. You never have to lift a finger. And because Vault runs in the background while you work, updates are automatically sent to our secure servers. Vault always has a recent copy of your reports stored online. If you prefer to manage your files on your own, you can disable the automatic upload options and manually upload your files.

Included with Vault is Exact. Exact helps you back up your personal user settings, QuickLists, comps database, and contacts. Instead of reconfiguring from scratch after getting a new system or recovering from a failure, Vault with Exact gets you back on track fast.

This short User's Guide takes you through the installation, configuration, and use of Vault and Exact tools. For a printed copy of this user's guide, click here.

To begin, log in to your alamode.com account here and click My Downloads on the left to install and configure Vault with Exact. To access the Vault video library for instructions, click here.

End User License Agreement

a la mode, inc.

INTERNET VERSION--CLICK-WRAP

VAULT AGREEMENT

IMPORTANT NOTICE TO USER--PLEASE READ CAREFULLY

YOU MAY NOT ACCESS THIS WEBSITE (THE "WEBSITE") OR THE VAULT SERVICE INCLUDED THEREON ("VAULT") UNLESS YOU FIRST REVIEW AND ACCEPT THE TERMS AND CONDITIONS OF THIS VAULT AGREEMENT (THE "AGREEMENT") BY CLICKING ON "Yes" AT THE BOTTOM OF THIS FILE. AFTER YOU REVIEW THE TERMS AND CONDITIONS BELOW, PLEASE ACKNOWLEDGE YOUR AGREEMENT BY CLICKING ON "Yes," OR THAT YOU DECLINE THIS AGREEMENT BY CLICKING ON "No" AT THE BOTTOM OF THIS FILE. YOU CANNOT OBTAIN ACCESS TO VAULT UNLESS YOU AGREE TO THE TERMS AND CONDITIONS OF THIS AGREEMENT BY CLICKING ON "Yes."

TERMS AND CONDITIONS

1.

Subscription.* You hereby subscribe for, and a la mode, inc. ("ALM") hereby agrees to provide, electronic storage on Vault for real estate appraisals.

2.

Intellectual Property.* You acknowledge and agree that Vault is a valuable commercial product of ALM, the development of which has involved expenditure by ALM of substantial time and money. You further acknowledge and agree that you have no ownership rights in Vault. You further acknowledge and agree that the name and mark "Vault" and all associated names, marks and logos (collectively, the "Marks") are the trademarks and/or service marks of ALM or its affiliates, and that any trade dress, trademark, service mark or designs related to Vault and/or the Marks are the intellectual property of ALM and are protected by United States copyright laws, trademark laws, trade secret laws, international treaties, and applicable laws of the states and jurisdictions where they are used. This Agreement does not grant to you any ownership right in the Marks or in any other intellectual

property of ALM. All right, title and interest in and to the Marks and any other intellectual property of ALM shall remain with ALM.

3.

Software.* From time to time, software may be provided by ALM to you for use in connection with Vault, either electronically or in diskette or other form. If such software is delivered with or includes a proposed license agreement (including, without limitation, a "shrink wrap" or similar license agreement or a license agreement which appears in one of the first screens of the software), then unless otherwise agreed by ALM and you in writing, if you use such software, you will be deemed conclusively to have accepted the terms of such license agreement. In the event you receive software and/or software documentation in connection with Vault which is not specifically covered by the terms of a license agreement described in the immediately preceding sentence or a separate agreement between ALM (or, if different, the licensor of the software) and you (collectively, "Additional Software"), the following provisions of this Section 4 will apply to such Additional Software:

(a) ALM grants a nonexclusive, nontransferable license to you to use an executable version of the Additional Software in connection with Vault and for such other purposes to which ALM may consent in writing and for no other purpose whatsoever. No ownership or other interest in the Additional Software is granted to you, other than the license granted in the immediately preceding sentence. The Additional Software is provided for your internal use only, and you will not enable or (to the extent within your control) permit any third parties to use the Additional Software, either directly or through you. THE ADDITIONAL SOFTWARE IS PROVIDED TO YOU IN ITS "AS IS" CONDITION AND ALL EXPRESS AND IMPLIED WARRANTIES ARE EXPRESSLY EXCLUDED, INCLUDING, WITHOUT LIMITATION, THE IMPLIED WARRANTIES OF MERCHANTABILITY AND FITNESS FOR A PARTICULAR PURPOSE.

(b) ALM reserves the right to modify or enhance the Additional Software at any time and, at its option, may make available to you the modified and/or enhanced versions of the Additional Software. Unless otherwise agreed by ALM in writing, you will use only the most recent version of the Additional Software provided by ALM and will follow ALM's instructions concerning the return or destruction of any prior versions of the Additional Software. You recognize that ALM may at times elect to provide the Additional Software in electronic form and agree that you will provide ALM with remote access to all ALM applications and related software residing at your site to the extent reasonably necessary to enable ALM to (i) determine the version of the Additional Software then in use by you, and (ii) download the current version of the Additional Software.

(c) You recognize that the Additional Software constitutes proprietary and confidential information and trade secrets belonging to ALM and, in some cases, third parties. You agree to treat the Additional Software as strictly confidential and not to disclose or permit the disclosure of the Additional Software to any third party without ALM's prior written consent. You agree not to modify, enhance, translate, disassemble or reverse engineer the Additional Software in any manner or for any reason. You further agree not to copy the Additional Software, in whole or in part, other than for the limited purpose of creating a single archival or backup copy. You will reproduce without modification on every copy of the Additional Software all copyright, confidentiality and other proprietary notices included on the original version or otherwise provided by ALM.

4.

Indemnity.* You will indemnify, defend and hold harmless ALM and its affiliates, and their officers, directors, employees and agents (each, an "Indemnified Party") from and against any and all claims, demands, lawsuits, costs, expenses, obligations, liabilities, damages, recoveries and deficiencies, including interest, penalties, reasonable attorneys' fees, costs of investigation and any legal or other expenses or costs (each, a "Liability") incurred or suffered by any Indemnified Party arising out of, in connection with or resulting from your access or use of the Website or Vault, unless any such Liability is caused by the gross negligence or willful misconduct of ALM, in which case the indemnification obligations hereunder shall not apply. In no event will ALM be

responsible for any loss or damage caused by your failure to perform your responsibilities under this Agreement.

5.

Security.* Although information that you transmit over or store on Vault may be password-protected, ALM does not guarantee the security of any information transmitted over or stored on Vault. You assume the risk for any information that you transmit over or store on Vault and ALM specifically disclaims any liability arising in connection with any theft or loss of your information transmitted over or stored on Vault.

6.

Ownership of Stored Information.* ALM acknowledges and agrees that any information transmitted or stored by you through Vault is your property. Except as otherwise set forth in this Section 6, ALM will not use or disclose any information transmitted or stored by you through Vault. For purposes of operation, maintenance or safety, ALM may copy, store and distribute internally any such information and will use reasonable care to prevent a loss of, alteration of, or improper access to such information. However, ALM does not guarantee these procedures will prevent the loss of, alteration of, or improper access to any such information.

7.

Service Level Warranties.* The service level warranties provided by ALM for Vault are specified on Schedule A attached hereto. EXCEPT FOR THE SERVICE LEVELS EXPRESSLY SET FORTH ON SCHEDULE A, ALM DOES NOT WARRANT THAT THE FUNCTIONS CONTAINED IN OR THE PERFORMANCE OF VAULT WILL MEET ANY REQUIREMENTS THAT YOU MAY HAVE, AND ALM DISCLAIMS ALL OTHER WARRANTIES OF ANY KIND, EITHER EXPRESS OR IMPLIED, INCLUDING, WITHOUT LIMITATION, THE IMPLIED WARRANTIES OF MERCHANTABILITY AND FITNESS FOR A PARTICULAR PURPOSE. ALM does not warrant uninterrupted or error free operation of Vault. You will permit ALM to take all appropriate measures to correct any deficiency in Vault and, in the absence of a reasonable opportunity to correct any such deficiency, ALM will not be in breach of its obligations.

ALM may, at its option, substitute for or add to Vault and take such other measures as may be necessary to correct any deficiency.

8.

No Liability for Unauthorized Use.* You are solely responsible for ensuring that each password for Vault is utilized only by you or, if applicable, by your authorized employees and agents. ALM shall have no liability for any loss, claim, damage or other liability that may arise from the unauthorized use of a password. If a password is lost or stolen or if you have reason to believe that your Vault account is no longer secure for any reason, it is your responsibility to notify ALM of such loss or theft so that the password can be deactivated and a new password assigned. ALM will use commercially reasonable efforts to effect password deactivation requests promptly after their receipt in writing from you.

9.

Limitation of Liability.* IN NO EVENT WILL ALM BE LIABLE TO YOU FOR ANY CONSEQUENTIAL, INCIDENTAL, EXEMPLARY, INDIRECT, SPECIAL OR PUNITIVE DAMAGES WHATSOEVER (INCLUDING DAMAGES FOR LOST PROFITS OR LOSS OF BUSINESS) ARISING OUT OR RELATED TO VAULT OR THIS AGREEMENT REGARDLESS OF THE NATURE OR BASIS OF THE CLAIM INCLUDING, BUT NOT LIMITED TO, TORT, CONTRACT OR STRICT LIABILITY CLAIMS. IN ADDITION, EXCEPT FOR THE SERVICE LEVEL WARRANTIES SPECIFIED IN SCHEDULE A HERETO, ALM SHALL HAVE NO LIABILITY OF ANY KIND OR NATURE TO YOU ARISING OUT OF OR RELATED TO (i) YOUR USE OF OR INABILITY TO USE VAULT, OR (ii) ANY UNAUTHORIZED USE OF VAULT BY USER OR OTHERS WHO OBTAIN YOUR PASSWORD BY ANY METHOD WHATSOEVER (EVEN IF ALM HAS BEEN ADVISED OF SUCH UNAUTHORIZED USE IN ACCORDANCE WITH SECTION 8 OF THIS AGREEMENT) UNLESS SUCH PASSWORD IS DISCLOSED DUE TO THE GROSS NEGLIGENCE OR WILLFUL MISCONDUCT OF ALM. IN THE EVENT THAT ALM IS LIABLE TO YOU FOR ANY LOSS ARISING OUT OF OR RELATED TO VAULT OR THIS AGREEMENT, ALM'S AGGREGATE LIABILITY TO YOU WILL IN NO EVENT EXCEED THE AMOUNT OF ANY ACTUAL MONETARY LOSS OR DAMAGES SUFFERED UP TO, AND NOT IN EXCESS OF, THE AGGREGATE

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FEES PAID BY YOU TO ALM UNDER THIS AGREEMENT DURING THE TWELVE MONTHS IMMEDIATELY PRECEDING THE CLAIM.

10.

Export Restrictions.* This Agreement is expressly made subject to any laws, regulations, orders or other restrictions on the export of Vault from the United States, which may be imposed from time to time by the government of the United States. Persons from certain restricted countries may be prohibited from using Vault. You acknowledge and agree that ALM may restrict any use of Vault that ALM deems to be in violation of United States export restrictions or other applicable law.

11.

Term.* This Agreement shall commence as of the date hereof and continue for one year unless sooner terminated as provided for in the following sentence. You may terminate this Agreement at any time and for any reason within 100 days of accepting the terms and conditions thereof by giving written notice thereof to ALM. If you terminate this Agreement in accordance with the terms of the preceding sentence, ALM will refund all fees paid by you hereunder.

12.

Modifications.* ALM reserves the right to modify Vault at any time, provided that such modifications do not have a material adverse impact on the Vault service. You hereby agree to accept any such modifications to Vault.

13.

Entire Agreement.* This Agreement (including Schedule A attached hereto) represents the entire agreement between ALM and you with respect to the subject matter hereof and supersedes all prior or contemporaneous understandings and agreements, written or oral.

14.

Governing Law.* This Agreement shall be construed and governed under the laws of the State of Oklahoma, excluding the application of its choice of law principles.

15.

Waiver.* Neither the failure nor the delay of a party in exercising, enforcing or taking action with respect to any of such party's rights or powers hereunder shall operate as a waiver of such rights or powers. No single or partial exercise by a party of any of its powers or rights will preclude such party from exercising such powers and rights in the future or from exercising other powers and rights.

SCHEDULE A

SERVICE LEVELS

The Vault will be available 99% of the time, except for Scheduled Downtime. Scheduled Downtime will consist of up to eight hours per month and will occur between the hours of 11:00 p.m. and 7:00 a.m. Oklahoma time. Customers will be notified at least 24 hours prior to the Scheduled Downtime. If unplanned, emergency maintenance is required, customers will be notified via e-mail or message board of the maintenance action and the time period needed to complete the work.

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you shall treat the feedback and all information contained in such feedback as confidential information that is owned by Microsoft, and shall not share such feedback with any third parties.

YOU ACKNOWLEDGE THAT YOU HAVE READ THIS AGREEMENT, THAT YOU UNDERSTAND IT AND THAT YOU AGREE TO BE BOUND BY ITS TERMS AND CONDITIONS. YOU FURTHER ACKNOWLEDGE THAT THIS AGREEMENT CONSTITUTES THE ENTIRE AGREEMENT BETWEEN YOU AND ALM AND SUPERSEDES ANY PROPOSAL OR PRIOR AGREEMENT, ORAL OR WRITTEN, AND ANY OTHER COMMUNICATIONS BETWEEN US RELATING TO THE SUBJECT MATTER OF THIS AGREEMENT. YOU ALSO AGREE THAT ALL THE TERMS AND CONDITIONS OF THIS AGREEMENT APPLY TO YOUR USE OF VAULT, SHOULD YOU CHOOSE TO PROCEED WITH THE USE AND IMPLEMENTATION OF VAULT.

Installation

In order to take full advantage of Vault's powerful backup tools, we provide an upload application to automate the process. This tool installs the necessary components for you to access your appraisal files using Windows Explorer. This tool also controls our Exact application that saves your WinTOTAL preferences and customizations.

> Note: It is important that you install Vault locally on the computer where your files and databases are stored. If you are running WinTOTAL or TOTAL in a networked environment, you'll want to install Vault on the server computer to ensure that all of your data is backed up correctly. Any deviation from this is done at your own risk and is not supported.

To install Vault:

1. Click here to log in to the My Downloads section of you account using your a la mode username and password.

2. Look for the Vault entry in your list of Products and click Download.
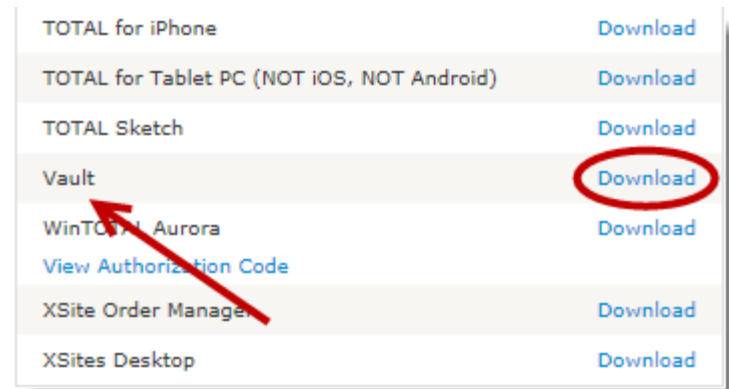
3. Click Run on the next screen.
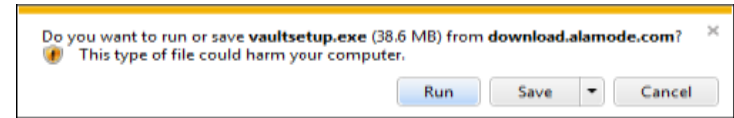
4. Follow the instructions in the installation wizard to complete the install.

After you've completed the installation process, you must first configure the Vault with your account information and preferences to take full advantage of all Vault utilities. For specific steps on configuring Vault's file backup utilities, see the Configure Vault section of this User's Guide. For specific steps on configuring Vault's companion tool, Exact, see the Configure Exact section of this User's Guide.

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Vault Express

Appraisers with a Silver, Gold or Platinum Membership and no other Vault account are entitled to a complimentary Vault Express account. Here are some of the basic differences between Vault and Vault Express.

- Full Vault accounts are intended as a means of backing up years of appraisal files. Ideally, you'd have your entire five-year requirement backed up securely in Vault. Vault Express, however, is intended to help you keep backups of your active work. To that end, Vault Express automatically backs up your 20 most recent files. So, if you make a change to a file while you're actively using Vault Express, you can rest assured that it will automatically find its way into Vault.

- Full Vault accounts have powerful filtering and searching features to help you find exactly which file you need from your backup of several hundred or several thousand files. Since Vault Express only holds 20 files, you won't need filtering and searching features so they won't show up unless you have purchased the full version of Vault.

- Unlike standard Vault memberships, Vault Express isn't accessible from within WinTOTAL and TOTAL's file cabinet. Instead, to upload files, you run the Vault Express Configuration from its program group on your Start Menu or use the upload feature from the Vault Website.

- Unlike Vault, Vault Express does not include Exact, our product specifically designed to back up WinTOTAL and TOTAL's preferences and settings for easy recovery or migration to a new PC.

- Vault Express also has fewer steps in the Setup Wizard.

Apart from the items mentioned above, Vault Express functions like any other Vault account. To account for both, this User's Guide describes the setup and usage steps for full Vault accounts. Where appropriate, the manual does include notes about differences in Vault Express as well. For more information about full Vault accounts or to upgrade, see our Vault web page at www.alamode.com/vault.
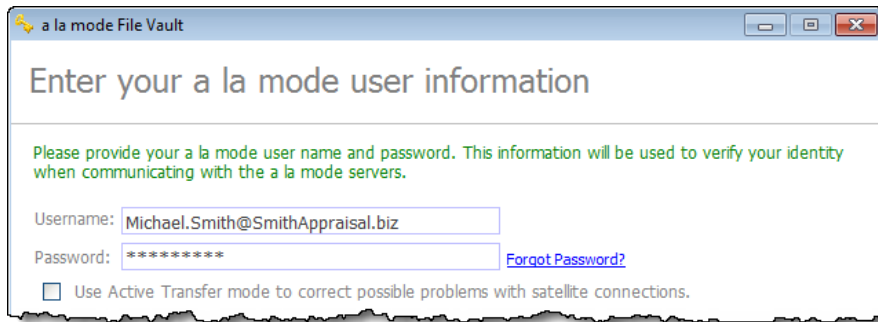
Configure Vault Express

Vault Express backs up as many as 20 of your new and recently updated report files. The Vault Express configuration tool walks you through the process of scheduling your automatic backup so that you can ensure that your most recent files are safely stored in the Vault regardless of what happens to your computer.

WARNING: The instructions below are a la mode's recommended settings. While you're free to customize Vault's settings to suit your needs, any deviation from the settings below are done at your own risk and are not supported.
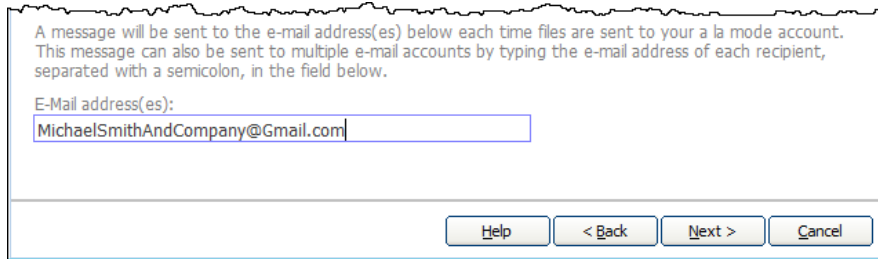
Before getting started, make sure you've installed Vault Express. Then, follow the instructions below to configure it:

1. Click Start, [All] Programs, a la mode Vault, and select Configure Vault.

    Hint: If you're using Windows 8, simply begin typing Configure Vault while you're at the Start screen and press Enter to launch the Vault Configuration Wizard.

2. When you see the Introduction screen, click Next.

3. Enter your Username and Password. If you have forgotten or lost this information, click Forgot Password? and follow the instructions in the password retrieval wizard. Check the box to use Active Transfer mode ONLY If you're using a satellite internet connection. If you're not sure what type of internet connection you have, it's best to leave it unchecked.
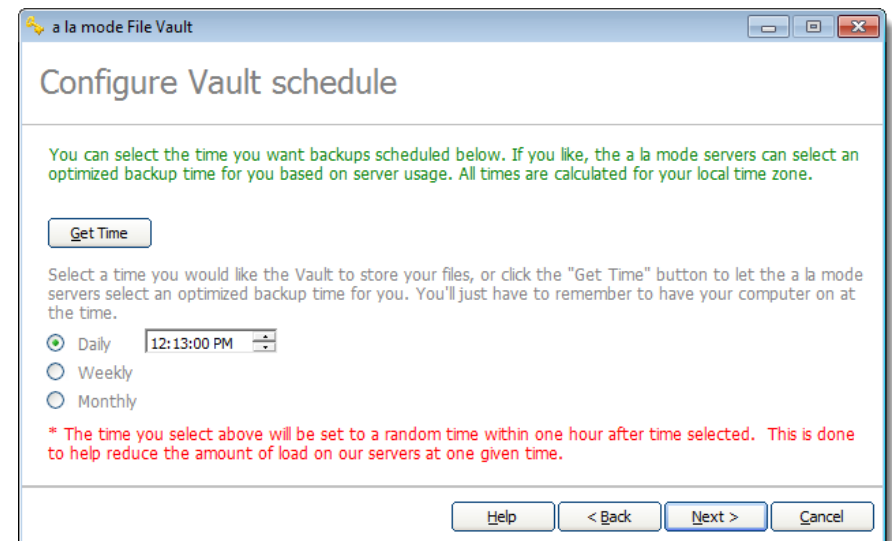
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At the bottom of the screen, type your e-mail address in the box provided. We use this e-mail address to send you confirmation notices whenever your Vault attempts an upload.

Note: These confirmation notices also serve as an indication that Vault is working correctly. If you schedule an automatic upload or manually upload files to the Vault and you do not receive a confirmation notice, something is wrong. Run through the configuration wizard again per the instructions here to confirm that your e-mail address is correct. If it is, you may need to contact our support technicians for assistance.

4. Click Next to continue and Vault connects to our servers to verify your information.

5. Select the Yes option to schedule automatic backup and click Next.

6. Choose between the Daily, Weekly, or Monthly options to control how often Vault checks for and uploads new and updated files. Then, schedule a time with the fields provided and click Next to continue.

Hint: You don't have to upload at night. Vault works in the background

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and can be running while you work on other things. But, if you just can't decide on a time, click Get Time to query the Vault server for the best time to upload your files, based on the current system load. You need to ensure that your PC is on and connected to the Internet at the scheduled time in order for Vault to upload your files.

7. Finally, Vault connects to the Internet and checks to see if there are any new or updated files that need to be uploaded. After it's done searching, Vault displays the number of files (new and updated) that were found, and how many it is preparing to upload to Vault. To upload the files now, click Continue and then click Finish when the upload is complete. Otherwise, click Finish to upload them later.
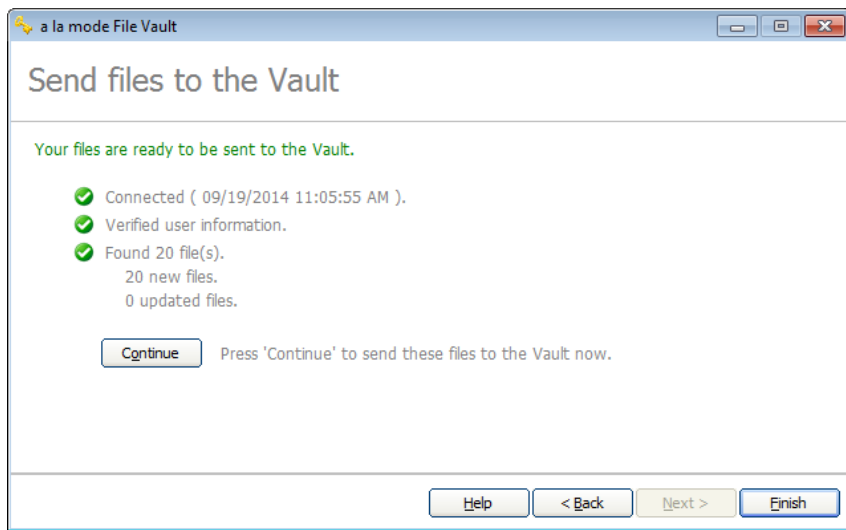
Send files to the Vault

Your files are ready to be sent to the Vault.

- ✅ Connected (09/19/2014 11:05:55 AM).
- ✅ Verified user information.
- ✅ Found 20 file(s).
  - 20 new files.
  - 0 updated files.

Continue — Press 'Continue' to send these files to the Vault now.

Help | < Back | Next > | Finish

That's it! Your Vault tools are configured for uploading your appraisal report files to your secure Vault account. Once you have sent your first batch of files to the server, keep in mind that the files are still on your computer, but they are also safely backed up on our servers. To notify you of your Vault activity, you receive an e-mail that confirms your file transfer and lets you know exactly what files were uploaded, along with the current status of your account. If you ever need or want to reconfigure your Vault settings, simply go back to Step #1 and start over.

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Configure Vault

Vault really draws its value through its ability to automatically back up your new and updated report files. The Vault configuration tool walks you through the process of scheduling your automatic backup so that you can ensure that your files are safely stored in the Vault regardless of what happens to your computer.
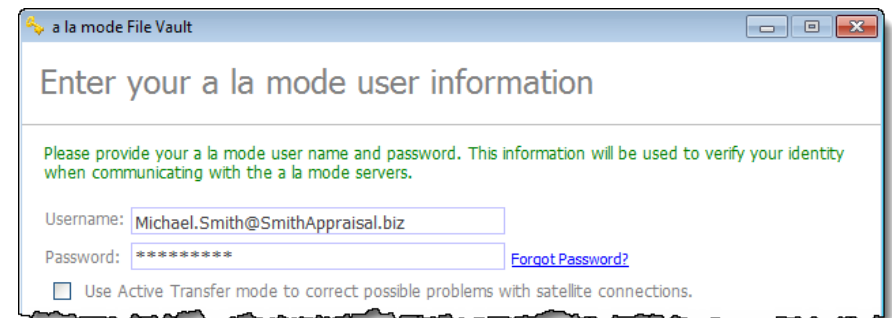
Note: The instructions below are a la mode's recommended settings. While you're free to customize Vault's settings to suit your needs, any deviation from the settings below are done at your own risk and are not supported.

Before getting started, make sure you've installed Vault. Then, follow the instructions below to configure it:
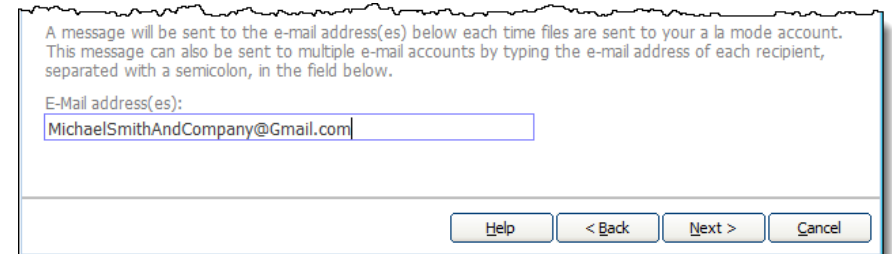
1. Click Start, [All] Programs, a la mode Vault, and select Configure Vault.

    Hint: If you're using Windows 8, simply begin typing Configure Vault while you're at the Start screen and press Enter to launch the Vault Configuration Wizard.

2. When you see the Introduction screen, click Next.

3. Enter your Username and Password. If you have forgotten or lost this information, click Forgot Password? and follow the instructions in the password retrieval wizard. Check the box to use Active Transfer mode ONLY If you're using a satellite internet connection. If you're not sure what type of internet connection you have, it's best to leave it unchecked.

At the bottom of the screen, type your e-mail address in the box provided. We use this e-mail address to send you confirmation notices whenever your Vault attempts an upload.


Note: These confirmation notices also serve as an indication that Vault is working correctly. If you schedule an automatic upload or manually upload files to the Vault and you do not receive a confirmation notice, something is wrong. Run through the configuration wizard again per the instructions here to confirm that your e-mail address is correct. If it is, you may need to contact our support technicians for assistance.

4. Click Next to continue. Vault software then connects to our servers to verify your information. Choose the file type(s) you want to store in Vault by checking or unchecking the box next to each file type. When you're finished, click Next again.


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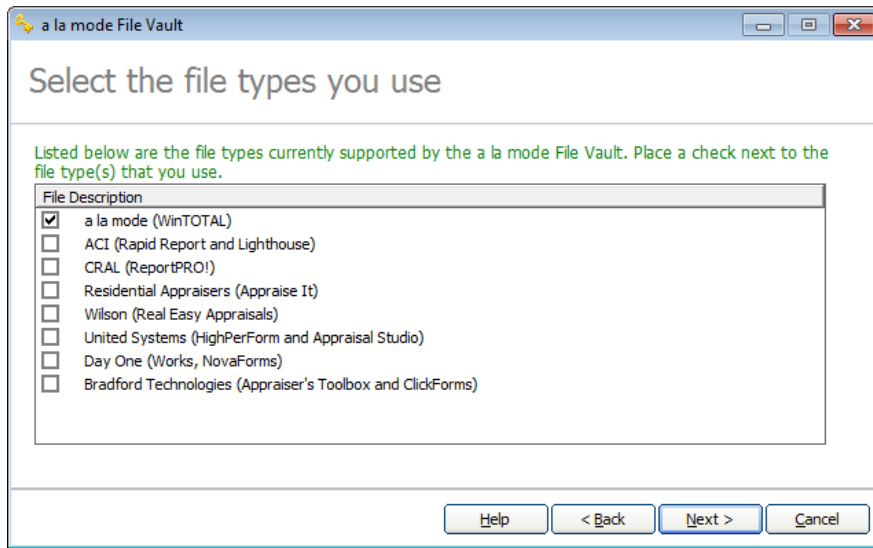
5. Select the Yes option to enable watched folders and click Next. By using watched folders, Vault monitors your folders for new or updated reports. If there are changes to files in these folders, Vault detects these changes and automatically uploads those reports for you during the next upload.
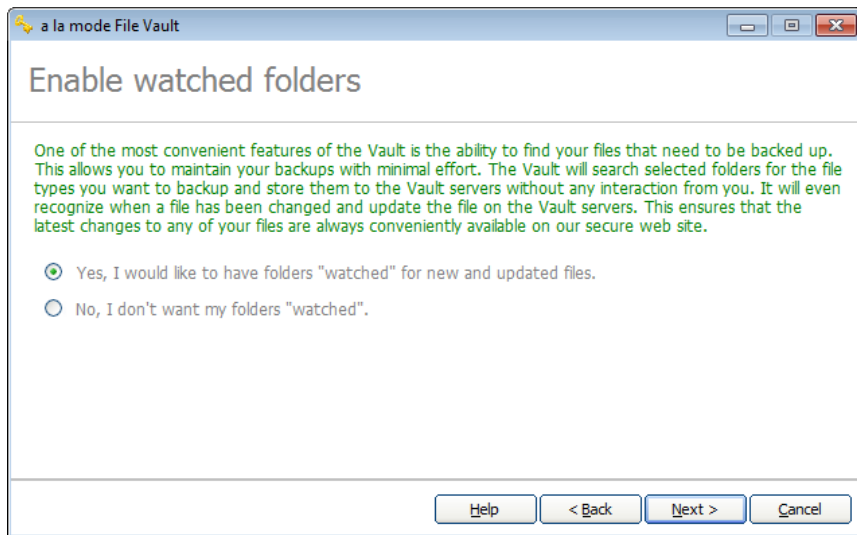

6. Next, choose which folders Vault should monitor:

   o Click Find Folders if you want Vault to automatically search for any folders containing reports.

   o To choose the folders yourself, click Browse and navigate to each folder you want Vault to watch.

   o Specify whether or not those folders have subfolders that should also be watched using the Include Subfolders column. Switch this option between yes (scan subdirectories) and no (ignore subdirectories) by double-clicking the line you want to change.

   o To remove any unwanted folders from your watched folders list, select the folder from the list and click Remove.

   o When all of the folders you want watched are listed, click Next to continue.
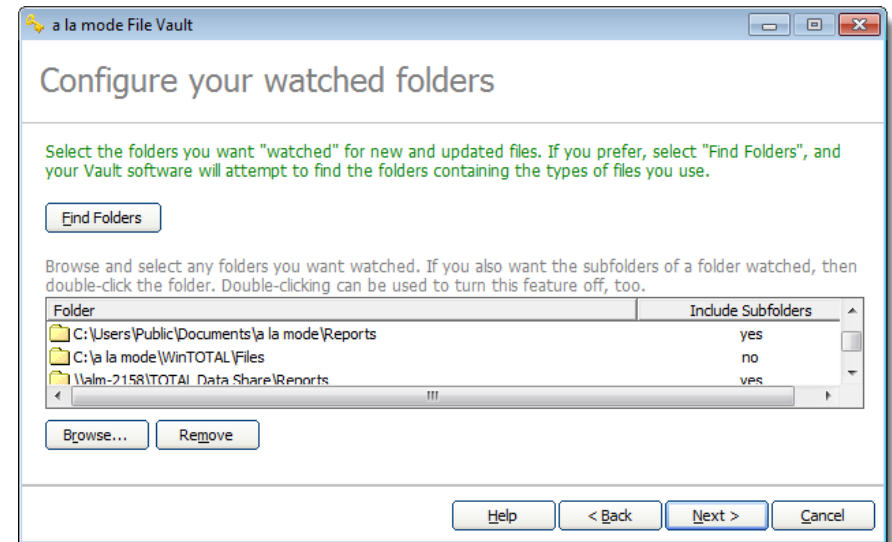
Note: We recommend that you avoid selecting the root of a drive as a watched folder. Doing so causes Vault to scan your entire hard drive every time you needed to upload a file. This takes a very long time and can lock up your system.

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7. Select the Yes option to schedule a time for automatic backup and click Next to continue.
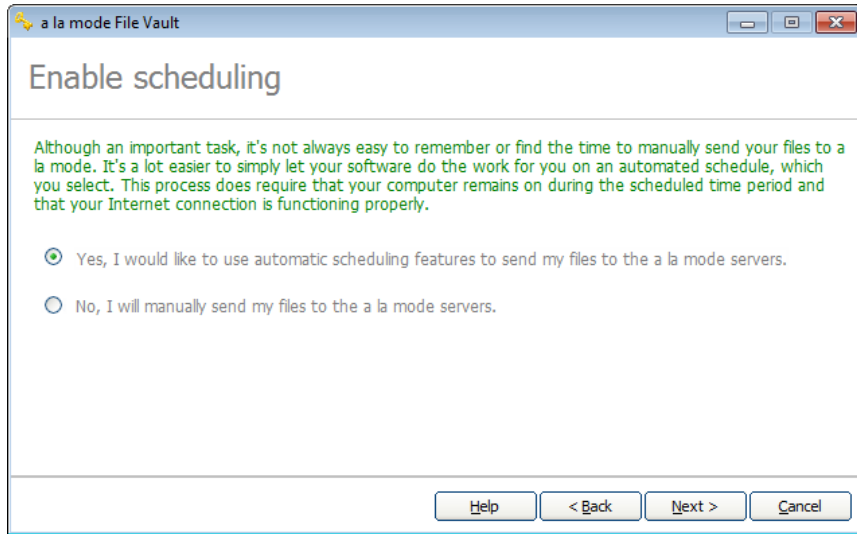
8. Choose between the Daily, Weekly, or Monthly options to control how often Vault checks for and uploads new and updated files. Then, schedule a time with the fields provided and click Next to continue.


Hint: You don't have to upload at night. Vault works in the background and can be running while you work on other things. But, if you just can't decide on a time, click Get Time to query the Vault server for the best time to upload your files, based on the current system load. You need to ensure that your PC is on and connected to the Internet at the scheduled time in order for Vault to upload your files.

9. Choose whether you want to limit the number of files you upload at one time. Typically, this is only enabled for slower internet connections. If you decide to set a limit, select the Yes option and specify a limit in the field provided. Otherwise, leave it set to No and click Next to continue.

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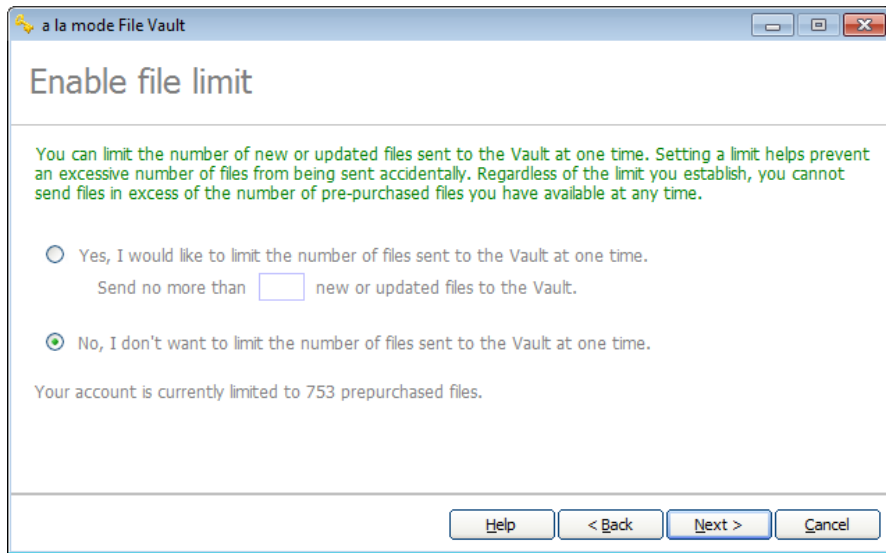
10. Finally, Vault connects to the Internet and checks your watched folders to see if there are any new or updated files that need to be uploaded. After it's done searching, Vault displays the number of new and updated files that were found and how many it is preparing to upload to Vault. To upload the files now, click Continue and then click Finish when the upload is complete. Otherwise, click Finish to wait until the next scheduled upload.

That's it! Your Vault tools are configured for uploading your appraisal report files to your secure Vault account. Once you have sent your first batch of files to the server, keep in mind that the files are still on your computer, but they are also safely backed up on our servers. To notify you of your Vault activity, you receive an e-mail that confirms your file transfer and lets you know exactly what files were uploaded, along with the current status of your account. If you ever need or want to reconfigure your Vault settings, simply go back to Step #1 and start over.

We also recommend that you configure Exact to keep a backup copy of your WinTOTAL settings, QuickLists, digital signature, and other important WinTOTAL data. See the Configure Exact section of this User's Guide for more details.

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Configure Exact

If you use TOTAL or WinTOTAL to create your appraisal reports, you can use Exact to preserve your entire WinTOTAL or TOTAL environment. After configuring Exact, you can ensure that your digital signatures, user profiles, QuickLists, contacts, and other important settings are safe in the event of a crash, or if you need to move to another computer. Before you begin uploading your software preferences, you must configure Exact to connect to the Internet and log into your account. Exact works in conjunction with Vault, and some of the configuration information is shared between the two programs. However, you can run Exact on a different schedule to suit your own needs. If you haven't already set up the Vault, it's best to do so first. For more information, see the Configure Vault section of this User's Guide. Keep in mind that Vault Express does not include Exact. If you currently own Vault Express and want to take advantage of Exact to back up the rest of your WinTOTAL installation, visit our Vault web page to upgrade to a full version of the Vault.

> Note: The instructions below are a la mode's recommended settings. While you're free to customize Vault's settings to suit your needs, any deviation from the settings below are done at your own risk and are not supported.

To configure Exact:

1. Click Start, [All] Programs, a la mode Vault, Configure Exact.

   > Hint: If you're using Windows 8, simply type Configure Exact into the Start screen and press Enter.

2. On the screen that appears, click the Next button to begin the configuration process.

3. The next screen prompts you to choose your Internet connection. If you've already run through the Vault configuration, you don't need to change your settings, as Vault duplicates them in Exact. Click Next to continue.

4. The next screen prompts you for your Username and Password. Since the Exact configuration remembers the setup you specified in the Vault configuration tool, your information will likely already be filled in. Click Next to continue.

5. On the next screen, choose the software package you are using. You can choose both boxes if you are using both TOTAL and WinTOTAL. Click Next to continue.

6. Next, select the Yes option to automatically upload your configuration settings. Exact keeps your last 7 preference configurations archived so you don't lose any of the settings you need.

7. Choose between the Daily, Weekly, or Monthly options to control how often Exact uploads your preferences. Then, schedule a time with the fields provided and click Next to continue.
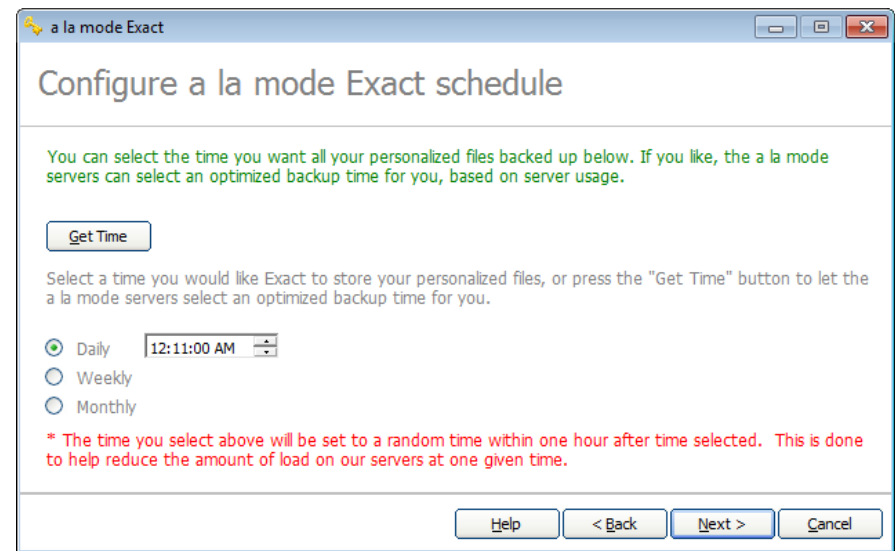
> Hint: You don't have to upload at night. Exact, like Vault, works in the background and can be running while you work on other things. But, if you just can't decide on a time, click Get Time to query the Vault server for the best time to upload your preferences, based on the current system load. You must ensure that your PC is on and connected to the Internet at the scheduled time in order for Exact to upload your preferences.

Vault & Exact

8. Exact then begins its initial backup of your preferences. Once it's done, click Continue to begin uploading your preferences immediately and click Finish when it's done. If you want to wait until the next scheduled backup to upload your preferences, just click Finish.

That's it! You've configured your Exact tools to upload your WinTOTAL or TOTAL configuration settings to our secure servers, and you have sent your first backup to your Exact account. The files are still on your computer, but they are also safely backed up on our servers.

Vault & Exact

Upload Files

There are a several ways to upload files to the Vault.

- If you configured Vault to use watched folders and scheduling, Vault automatically uploads any new or changed reports for you. (Recommended)

- You can upload files to the Vault directly from WinTOTAL or from TOTAL.

- If you configured Vault to use watched folders independent of your setting for scheduling, you can send files to the Vault from the Appraisal Desktop in TOTAL and WinTOTAL.

- You can upload the files through Windows Explorer from an open folder.

- You can upload files using the Vault's online interface.

For more information about configuring Vault for automatic uploads, see the Configuring Vault section of this User's Guide.

Upload from Windows

a la mode's Vault tools include a plug-in for Windows Explorer that lets you upload files directly to the Vault as you browse your computer.

To upload files from Windows Explorer:

1. Navigate to the folders that store your reports in Windows.

2. Select the file or files you want to send to the Vault and then right-click any one of the highlighted files.

   Note: If you're browsing through your files in Windows Explorer, you can view your report's data at a glance using the features described in the View Report Info section of this User's Guide to help you find the report you wish to send to the Vault.

3. From the menu that appears, click Send to Vault.
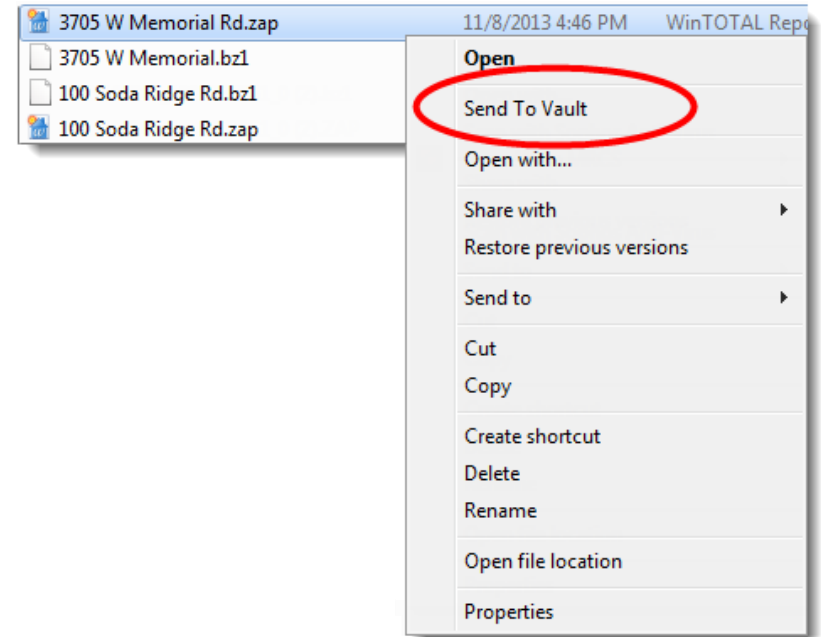
4. Choose your preferred upload option:

   o Send Now – Immediately initiates a connection and uploads the selected file(s), as well as any files that are waiting to be sent.

   o Send Later – Places the file(s) in a queue and sends the file(s) during the next scheuled backup or the next time you choose the Send Now option.

   o Remove – Removes the selected file(s) from the upload queue.
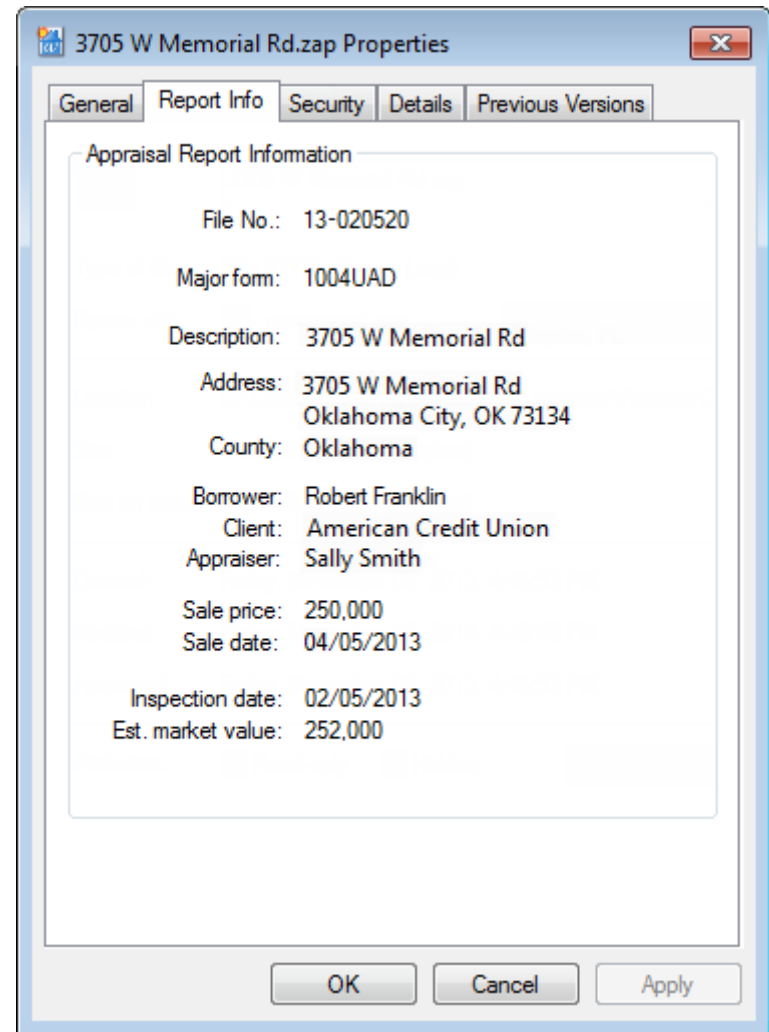
Vault & Exact
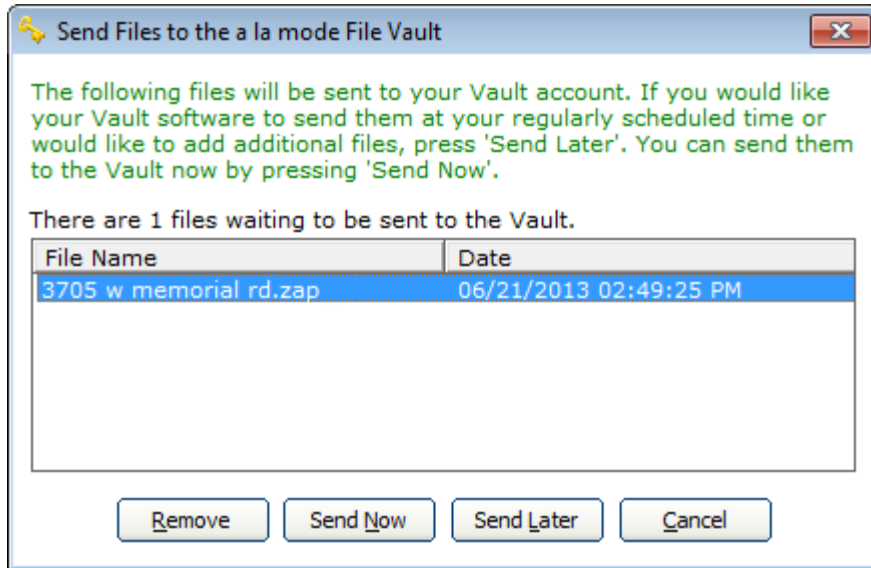
5. After choosing an option, your system either connects to the Vault immediately or waits until the next scheduled connection to send files.

Every time you upload files to your Vault account, whether you do it manually or automatically, you receive an e-mail confirmation of the transfer. This e-mail contains a session summary with a complete list of every file that was uploaded, the number of files that made it to the Vault, the number of files stored on our server, and the number of files left in your account. This acts as your "receipt" of the transaction.

View Report Info

One of the benefits of installing the Vault tools is the ability to view report information directly through Windows. If you are unsure which file you want to send, right-click the file and select the Properties option from the menu. In the screen that appears, click the Report Info tab to view critical information about that file, including the property address, file number, major form, etc.

Upload with Vault's Uploader

If you've configured Vault to use watched folders, you can access Vault's uploader directly to manually send a batch of files to the Vault.

Vault & Exact

To upload directly to Vault:

1. Click Start, [All] Programs, a la mode Vault, Send Files to Vault.

    Hint: If you're using Windows 8, simply type Configure Exact into the
             Start screen and press Enter.

2. Vault's uploader appears, verifies your a la mode login, and uploads
   any new and updated files.
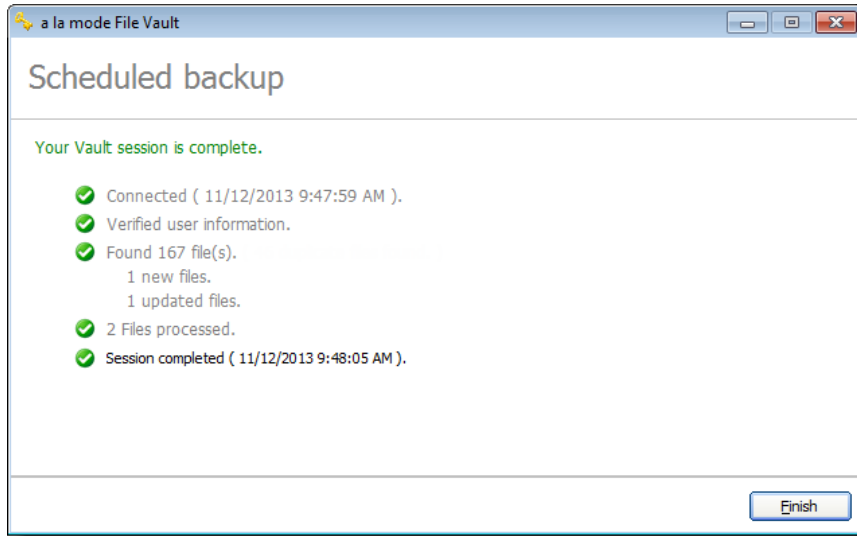
3. Review the summary of the upload and click Finish.

Every time you upload files to your Vault account, whether you do it manually
or automatically, you receive an e-mail confirmation of the transfer. This e-mail
contains a session summary with a complete list of every file that you
uploaded, the number of files that were transferred, the number of files you
have on our server, and the number of files left in your account.

Vault & Exact

Back Up Your Preferences

If you opted not to use the automated Exact scheduler, or if you want to backup your configuration data between the scheduled times, you can upload them to the server manually.

> Note: Vault Express does not include Exact. If you currently own Vault Express and want to take advantage of Exact to backup the rest of your WinTOTAL installation, visit our Vault web page to upgrade to a full version of the Vault.

To manually run the Exact back up:

1. Click Start, [All] Programs, a la mode Vault, Backup Your Preferences.

   > Hint: If you're using Windows 8, simply type Backup Your Preferences into the Start screen and press Enter.

2. Exact automatically gathers your WinTOTAL preferences, connects to the Internet, and begins uploading your preferences to our server. After it finishes uploading your data, simply click Finish.

Vault & Exact

Recover Your Preferences

After you've uploaded your preferences to our servers, use Exact's Recovery Wizard at any time to restore your settings. This is especially helpful when you get a new computer, so that you can get back up and running as fast as possible.

> Note: Vault Express does not include Exact. If you currently own Vault Express and want to take advantage of Exact to back up the rest of your WinTOTAL installation, visit our Vault web page to upgrade to a full version of the Vault.

To retrieve and restore your settings from Exact:

1. Click Start, [All] Programs, a la mode Vault, Recover Your Preferences.

    > Hint: If you're using Windows 8, simply type Recover Your Preferences into the Start screen and press Enter.

2. When the Introduction screen appears, click Next and confirm your connection type. Then, click Next again.

3. Verify or enter your login information and click Next to proceed.

4. Once your account has been verified, you're given the option to use either the Easy Recover or the Advanced Recover feature. Choose your recovery method and click Next:

    o The Easy Recover option downloads the most recent preference files that were uploaded to our servers and restores them on your computer automatically. If you have Exact configured to automatically back up your preferences regularly, this is the simpler method to choose. If you choose this option, skip to step #7.

    o The Advanced Recover option allows you to choose between any of the last seven copies of your user preferences that were uploaded to our servers. Use this if you want to restore specific settings that you choose, or to restore preferences from a date other than the most recent backup.

5. If you selected the Advanced Recover option, choose which version of your preferences you want to recover and click Next to continue.
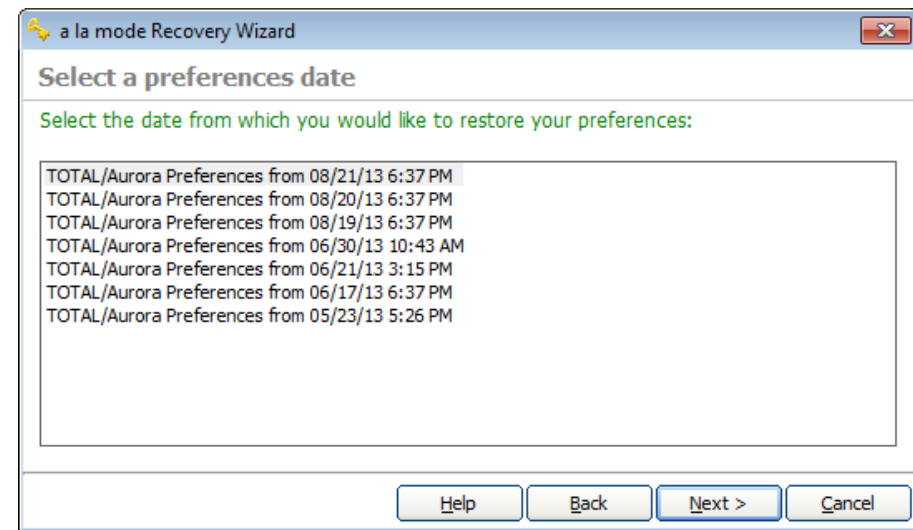
6. Once again, if you selected the Advanced Recover, you then have the option to choose which portions of your preferences you want to recover. Pick the items you wish to restore and click Next again.
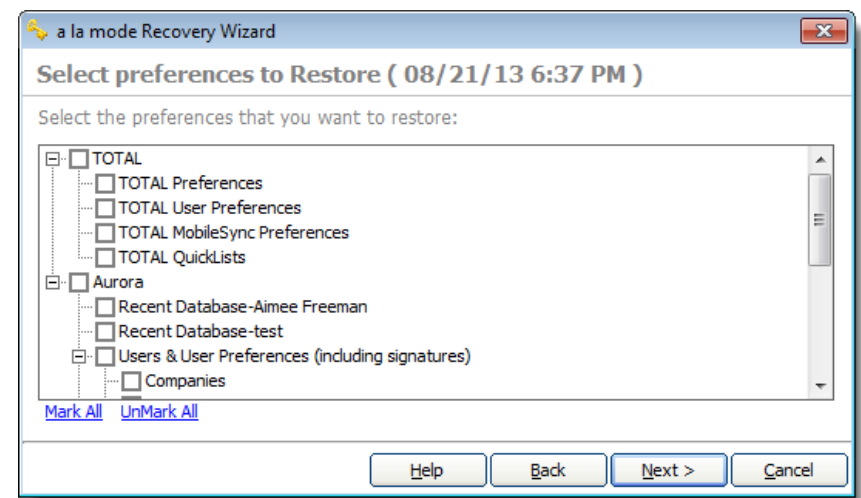
Vault & Exact

7. After your preferences are restored, simply click Finish to close the Recovery Wizard window.

Your appraisal software preferences are now restored and ready for you. Keep in mind that recovering preferences doesn't recover appraisal reports. You must transfer your reports manually or recover them from <u>the Vault website</u> to restore them on another computer.

Vault & Exact

The Vault Website

The Vault website provides 24/7 online access to your Vault files and settings, but in addition to these basic functions, Vault also provides a number of other capabilities. Using the Vault website you can:

- Install the Vault
- Upload individual files
- Retrieve, delete, and organize your online files
- And more...

The Vault website is divided into several sections to help you find exactly what you need.

- Today - This is the area that greets you when accessing the Vault on the web. It gives you quick stats about your account as well as common questions and answers. Check this often to find out what's new with the Vault.
- Files - Here you can search for, browse, retrieve, delete, and upload new files.
- Settings – Allows you to configure your column layout, the number of files displayed per page, and more.
- Install – Allows you to download and install the Vault software.
- Help – Links you to the most up-to-date help resources, including this User's Guide.

Log in to Vault

The Vault stores all of your files in a protected online account so that you can access your files 24/7 from any location where you have Internet access. This off-site storage method is what makes the Vault so safe and secure, but it also allows for additional convenience. For instance, you could grant Vault access to your staff appraisers so that everyone can collectively access the Vault files online even if you're all working from remote locations. You can access your online Vault account in two ways.

Through Your Appraiser XSite

If you're using an Appraiser XSite with your Vault account, you can log in to Vault directly through your Appraiser XSite. Or, if you need other staff members to be able to access your Vault account, you can grant them easy access to the Vault through your Appraiser XSite so that you don't have to hand out your Username and Password to every staff member.

To log into your Vault account through your Appraiser XSite or grant Vault access to another staff member:

1. Log into your Appraiser XSite as the administrator and click Vault in the main toolbar at the top of the screen to access your account.

   Note: If you've forgotten your Username and Password or if you're unsure about how to log in to your Appraiser XSite, you can retrieve your credentials and login instructions at http://www.alamode.com/configurepassword/default.aspx

2. If, you need to grant Vault access to other staff members, hover your cursor over My Office in the main toolbar and then click User Management in the toolbar that drops down.

3. Create or edit a user profile for the person you wish to grant access to.

Vault & Exact

4. Check the Vault box in the User Privileges section at the bottom of the screen and save the profile.

Your staff members can now log into your Appraiser XSite and click Vault in the main toolbar at the top to access your Vault account as well.
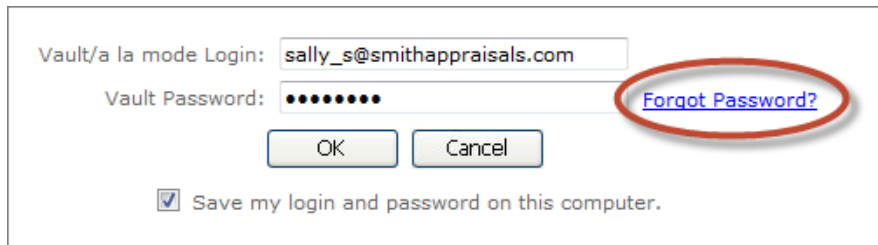
Through the Vault Website

Of course, even without an Appraiser XSite you can easily access your Vault account through the Vault's online web portal.

To access Vault without an XSite:

1. Click here to log in to the Vault website, or go to www.alamode.com/vault and click Log in on the upper right.

2. Enter your Username and Password in the fields provided and click OK to log in. If you've forgotten your login credentials, click the Forgot Password? link to retrieve them.

Upload From Your Vault Account

If you prefer not to use our scheduler or you need to upload a file before the scheduled time, you can upload an individual file directly through your online Vault account.

To upload to the Vault on the Web:

1. Log into your Vault account on the web.

2. Click Files to see a list of all current files in your Vault account.

3. Click Upload.
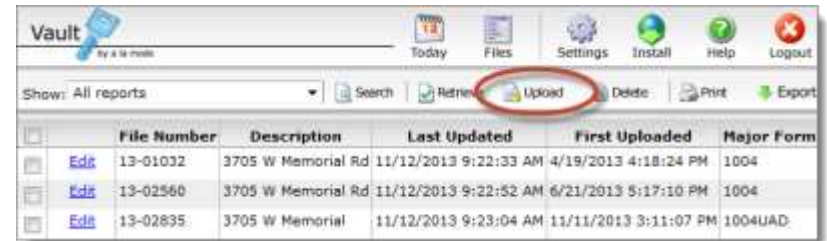
4. Browse for the file you want to upload by clicking Browse, navigating to the file and clicking Open.

   Hint: If you're using WinTOTAL, your files should be located in the FILES folder inside your WinTOTAL installation. For example, in Aurora, your file might be located within a folder at C:\a la mode\WinTOTAL\FILES. In TOTAL your files might be located in C:\Users\Public\Documents\a la mode\Reports or C:\Users*Your User Name*\Documents\a la mode\Reports.

5. Finally, click OK to upload your file.

Customize Your Files List

The Vault Files area has sorting functions as well as a configurable grid to display as few or as many details about the files you have stored.

To customize the reports and columns you see in the Vault:

1. Click Settings in the main toolbar at the top of the screen.

2. In the screen that appears, apply the changes you wish to see in your Vault files view. Options are:

   o Create additional columns by clicking a field in the All Available Fields list on the left and then clicking Add.

Vault & Exact

o Remove a column by selecting it in the list on the right and clicking Remove. This simply removes the data from view in the Vault and has no affect on the reports in your Vault account.

o Change the Title of a column in your files view by clicking it in the Selected Fields list and typing a new title for it in the Title field.

o Rearrange the order of the columns from left to right by clicking the Up (left) and Down (right) buttons below the Selected Fields list.

o Change the number of files that appear on each page of files on your Vault list by choosing a different setting from the Show menu inside the Other Grid Settings section.

o Indicate whether you want the data in the column to wrap around to the next line if it's too long to display on one line by checking or unchecking the Word Wrap Grid box.

o Specify which reports you want to see by default when you access your Vault list by choosing an option from the Report View drop down menu. For instance, if you're only interested in seeing recent files in your Vault account, you might choose Uploaded in the Last 7 Days from the list.

3. Click OK when finished to apply your changes.
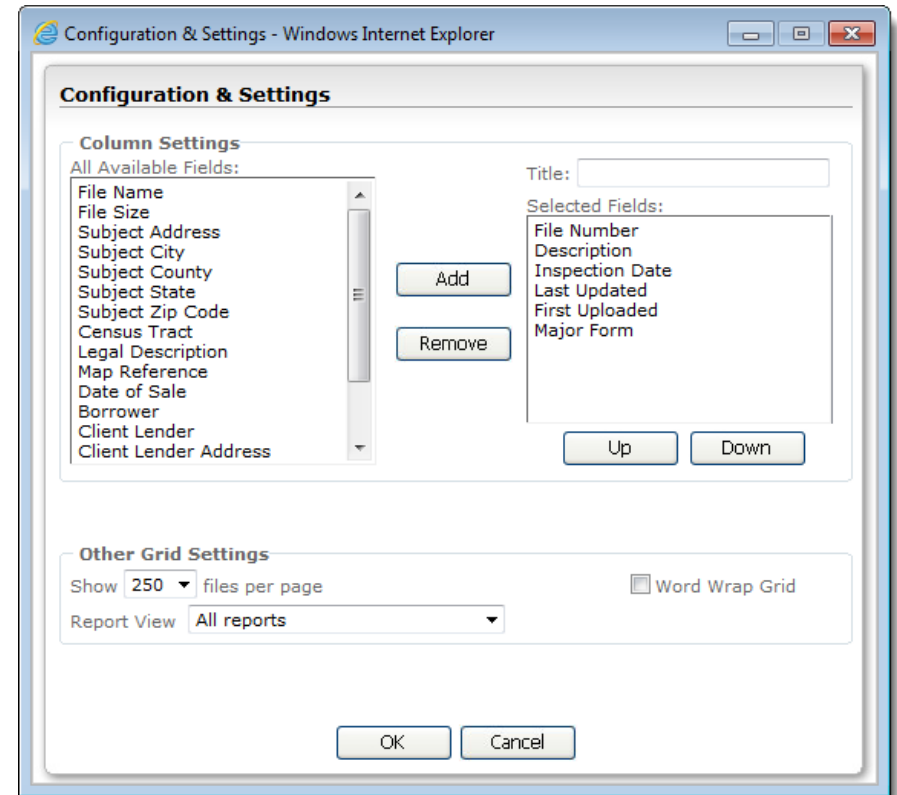
Edit File Information

Vault's files list enables you to quickly find and organize files. You can even edit the information that is displayed in the grid to add descriptive information that can help you more quickly find the files you need.

To edit the report info that appears in the files list:

1. Log into your Vault account and click Files in the main toolbar.

2. Browse to the file you want to modify, and click Edit.

Vault & Exact

3. Use the fields provided to change any of the current information to more descriptive information that you can use when managing your Vault account.

Edit Vault File

Edit Vault file information - 6430 n winding way, ...
File Information

File Name:	6430 n winding way, ...
Description:	6430 N Winding Way, Na
File Number:	KF02052013

Subject Information

Property Address:	6430 N Winding Way
Property City:	Naples
Property County:	Collier
Property State/Zip Code:	FL	81384
Appraiser:	Kathy Franklin
Client:	Ocean View Credit Unio
Client Address:	
Census Tract:	
Legal Description:	
Map Reference:	34940
Borrower:	Robert Crowley
Date of Sale:	2/5/2013
Inspection Date:	2/5/2013
Estimated Market Value:	$252000

OK   Cancel

Note: This only changes the information that appears in the files list. It

does not change the actual data in your report.

4. Click OK to save your changes.

Export Vault File List

Vault's export function allows you to export a spreadsheet containing a list of all the files that are currently being stored.

To export your Vault file list:

1. Using Internet Explorer, log in to your Vault account at https://vault.alamode.com/Login.aspx and click Files on the upper right.

2. When your list of files appears, click Export in the toolbar at the top.

3. In the next window, enter a name for the file, choose a convenient location to save the file (such as your Windows desktop), and click Save.

4. Once the file is saved, browse to that location and double click the file to open it in Excel or a similar spreadsheet application and view the exported data.

Retrieve Files

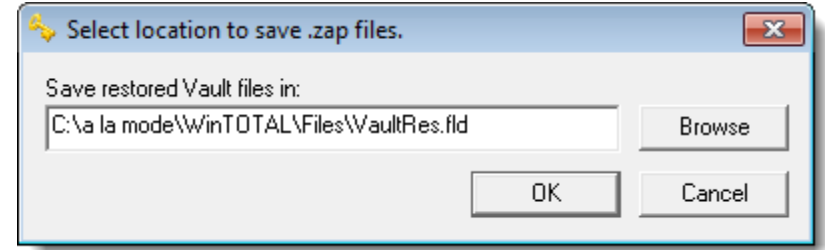You can retrieve any of your report files from the Vault using the Vault Web Interface.
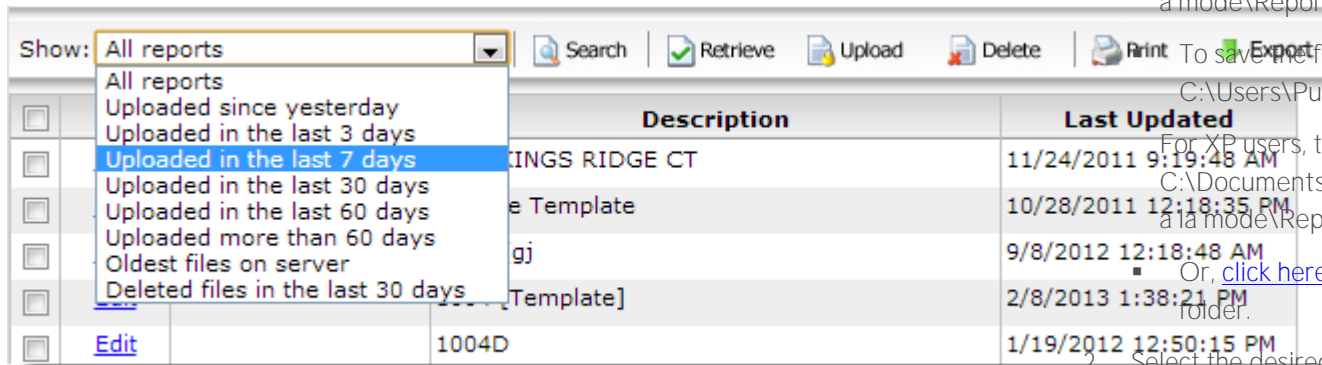
To retrieve a file:

1. Using Internet Explorer, log into your Vault account at https://vault.alamode.com/Login.aspx and click Files in the toolbar at the top.

2. In the list of files that appears, find the file or files you want to retrieve from the Vault.
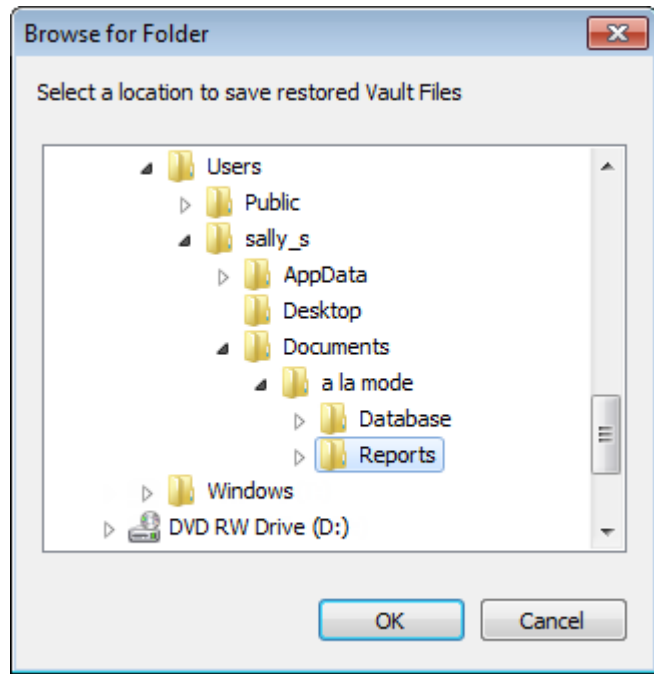
Vault & Exact

- By default, Vault displays 50 files per page to make it easier to navigate your files online. If you need to increase this number, click Settings in the main toolbar to the top right to access the Vault web configuration.

- Sort the list of files by clicking the column heading by which you wish to sort. Click the column heading again to reverse the sort order.

- To search for a file, click Search, enter your search criteria, and click OK.

- **To limit the files that appear in the list to those that you've** uploaded or deleted recently, click the Show drop-down list and specify which files you want to view. You can even view the oldest **files on the server if you're trying to free up space in your Vault** account by deleting files that have exceeded the five year requirement.

3. **When you've found the file or files you wish to retrieve, check the** box(es) to the left of each report to mark it for retrieval.

4. Click Retrieve.

5. Next, you're prompted to choose a location to save your files.

    - To save the file in WinTOTAL'a Vault Restore folder, click OK.
      Or, browse for the folder in which you want to save your report(s).
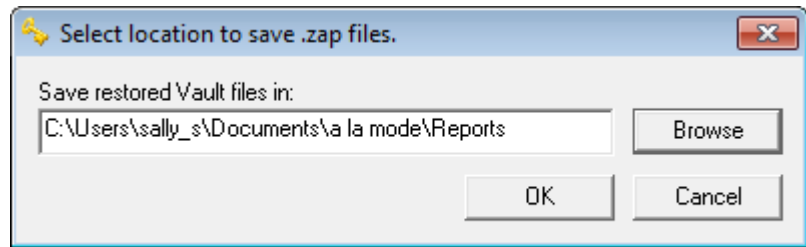

- To save the file in TOTAL:

    1. Click Browse, and navigate to the folder you want to save the file in.

        - To save the file to My Reports, browse to C:\Users\[username]\Documents\Reports.

        For XP users, the path to My Reports is C:\Documents and Settings\[username]\My Documents\a l a mode\Reports.

        - To save the file to Public Reports, browse to C:\Users\Public\Documents\Reports.

        For XP users, the path to Public Reports is C:\Documents and Settings\All Users\Shared Documents\ a la mode\Reports.

        - Or, click here to learn how to create a Vault Restore folder.

    2. Select the desired folder in the Browse for Folder window and click OK.

Vault & Exact

3.   Click OK again to begin the file download.

Delete Files

Whether your five year requirement passes or you need to remove files from your Vault account to free up space, it's easy to delete files from your Vault account.

To delete files from the Vault:

1.   Log into your online Vault account.

2.   Click Files in the upper right toolbar to access the files in your Vault account.

3.   Check the box or boxes next to the file(s) you wish to delete. If you want to delete the entire current page of files, check the box in the column header.

> Note: If you want to delete an entire range of files, you can perform a search to find the files you want to delete. For instance, if you want to find all of the files that are older than five years so that you can delete them, you'd click Search and specify a Sale Date or Inspection Date range older than 5 years. For a more specific list, you might click the Last Updated column heading to sort the files by the last time you updated them and just select the ones you want to delete from there.

4.   Click Delete.

5.   Click OK to confirm that you wish to delete the selected files.

It's that simple, but be careful. Once a file is permanently deleted from the Vault, you won't be able to retrieve it!
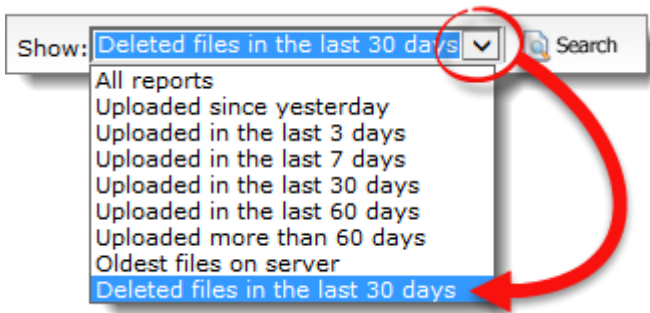
Viewing deleted files

As a safeguard, Vault automatically stores a copy of any file that is deleted for 30 days. To view the files that have been deleted, click the Show drop-down and select Deleted files in the last 30 days.

Vault & Exact

In addition to <u>retrieving files</u> from your list of deleted files, you also have the option to recover a file and restore it to the list of files currently stored in Vault. To recover a file from the list of deleted files:

1. Place a checkmark next to each file you want to restore.

2. Click Recover in the toolbar at the top.
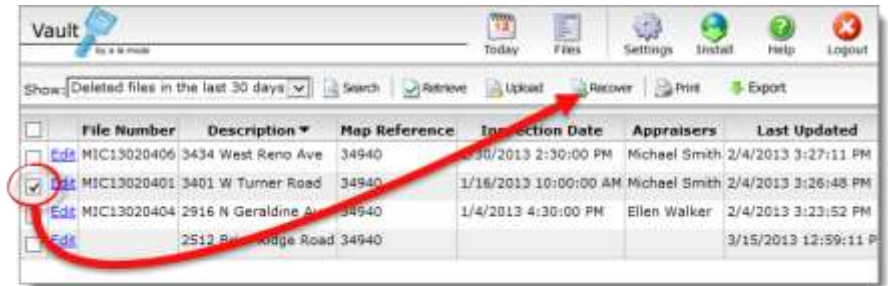
3. Click OK to confirm that you want to recover the selected files.

That's it! Your files are now restored and show up alongside your other files that are currently being stored in Vault.