Working with Multiple Appraisers

Course Highlights

- Understand the roles WinTOTAL and the Appraiser XSite plays in collaboration
- Configure your XSite for working with multiple appraisers
- Start new orders on one system and assign them to appraisers on local and remote systems
- Keep your staff and clients updated on report status
- Share and deliver reports to review appraisers and clients

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Working with Multiple Appraisers

Introduction to Working with Multiple Appraisers

More and more appraisers are discovering that they interact with colleagues in multiple locations to complete a report. Often, this is a traditional supervisor/trainee situation. Or a collaborative relationship between two or more established appraisers. Whatever the driving factor, WinTOTAL and your XSite can improve how you share orders and report information, while reducing the duplication of effort and information. This course explores the "best practice" workflow when using a la mode tools.

In general, there are three scenarios under which multiple appraisers may collaborate to complete a report:

1. Two or more appraisers working for the same company, in one physical office, attached to a network.
2. Two or more appraisers working for the same company, but from different locations, such as home offices.
3. Two or more appraisers from different companies at different locations.

While other situations may arise these are by far the most common. The first scenario was very common in years past, and still exists in many places today. Most of WinTOTAL's core report management tools were built around this idea.

The latter two scenarios present more of a challenge. Since the appraisers are not connected to the same network version of WinTOTAL, you cannot seamlessly share the same reports, QuickLists, comps database and other tools. In the third scenario, this is not an issue, since these appraisers working for different companies rarely share such data. In this case, collaboration is largely facilitated by using WinTOTAL's e-mail integration to send copies of a file from one appraiser to another.

The second scenario presents the greatest challenge, and is becoming more and more prevalent. Luckily, the Appraiser XSite can serve as the glue which makes this approach possible.

Best Practice Workflow

As a rule, the following guidelines will result in a smooth workflow among appraisers.

Appraisers working for one company at one site

In this scenario, using the Appraiser XSite to coordinate orders is not necessary, though it may be desirable if you plan to use the Billing and Business Management functions on the XSite.

1. Orders are created either via the XSite, or entered into WinTOTAL's Order PowerView.
2. Using the Order PowerView, or the XSite Order Management tools, orders are assigned to the individual appraisers.
3. Report file is moved into appraiser's folder
4. Appraiser retrieves order, completes report, then moves the file into supervisors folder (if necessary).
5. Appraiser or administrator delivers report.

Appraisers working for one company at remote sites

1. Orders are created either via the XSite, or entered into WinTOTAL's Order PowerView.
2. Using the Order PowerView, or the XSite Order Management tools, orders are assigned to the individual appraisers.
3. Remote appraisers link their copy of WinTOTAL with the company XSite, then use net.X Connector to synchronize orders. New orders assigned to the appraiser appear in the Tracking folders.
4. Appraiser completes the report, and delivers the report using the XSite Delivery tool.
5. Or, appraiser uses the e-mail delivery tool to return report to main office, or to supervisor directly.

6. Supervisor retrieves report from network - or e-mail – and delivers using XSite Delivery tool.

Appraisers from different companies

1. Orders are created either via the XSite, or entered into WinTOTAL's Order PowerView.
2. Appraiser sends copy of order and/or report to second appraiser using e-mail delivery tools.
3. Second appraiser completes report and returns appraisal to original owner via e-mail tools.
4. Original appraiser delivers report to client.

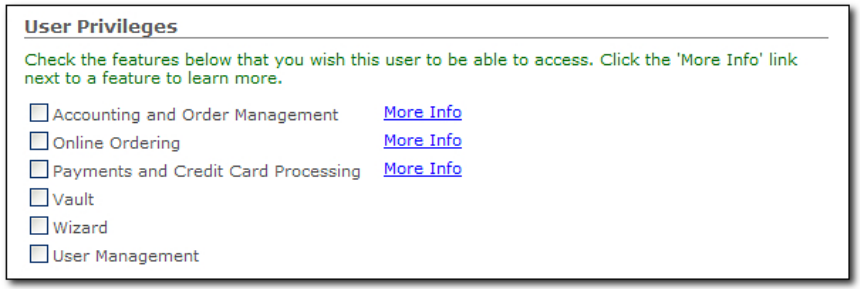
Configuring XSite Users

The glue that binds together multiple appraisers from the same company – whether in one office or working remotely - is the Appraiser XSite. Each appraiser should configure their copy of WinTOTAL to synchronize with this XSite, allowing the users to share:

1. Order Assignments
2. Contacts
3. Files (through the Vault)
4. QuickLists and other databases (through Exact)

The first consideration when configuring your systems to work with multiple appraisers is to establish functional roles (appraiser, supervisor, trainee, administrator, etc.) and then create user accounts on your XSite for each. Each user account you create can have any combination of the following User Privileges assigned:

- **Accounting and Order Management** – Grants a user access to the entire office's list of orders – as well as all accounting data – and allows the user to manage it.



- **Online Ordering** – Adds the user to the system so that appraisal orders can be assigned.
- **Payments and Credit Card Processing** – When enabled, this feature allows users to create invoices and process credit cards for all orders in your office.
- **Vault** – Grants a user the rights to access your Vault files and Exact profiles.
- **Wizard** – Grants a user the rights to edit the content on your site.
- **User Management** – Grants a user the rights to edit not just his or her own profile, but the profiles for the entire office.

For the purposes of working on reports, a user must have the Online Ordering privilege enabled. Also, for appraisers in remote offices, turning on the Vault privilege lets them back up their files, and retrieve the latest copies of common QuickLists and other databases.

Task: Create a new appraiser user account

1. Login to your XSite and hover your mouse cursor over the **My Office** icon in the toolbar. From the drop-down menu, click **User Management**.
2. Click the name of the user whose profile you wish to edit or, alternately, click **Add User** to create a new profile.
3. Fill out any necessary contact or personal information in the fields provided. At a minimum, enter an e-mail address, a password, and the user's first and last name.

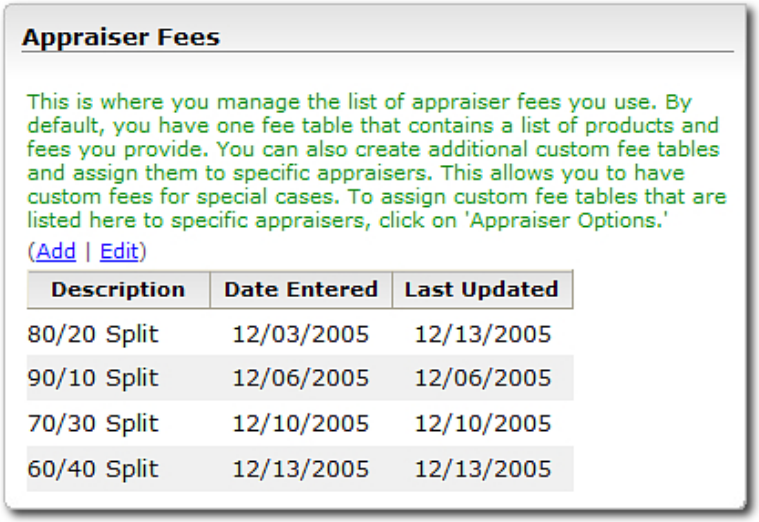
4. Scroll down and check the boxes beside any **User Privileges** you wish to grant to your new user.

Building Appraiser Fee Splits

Creating fee split tables for your individual appraisers is not strictly required for working with multiple appraisers. You can still assign orders and share other resources. But it is necessary if you plan on using the Business Management functions to track the amounts owed to individuals for the reports they complete.

Task: Build a Fee Split table

1. From your XSite's Business Management tools, click **Options** in the **Navigation** pane on the left.
2. Next, click **Appraiser Fees** below the **Navigation** pane.



Appraiser Fees

This is where you manage the list of appraiser fees you use. By default, you have one fee table that contains a list of products and fees you provide. You can also create additional custom fee tables and assign them to specific appraisers. This allows you to have custom fees for special cases. To assign custom fee tables that are listed here to specific appraisers, click on 'Appraiser Options.'

(Add | Edit)

Description	Date Entered	Last Updated
80/20 Split	12/03/2005	12/13/2005
90/10 Split	12/06/2005	12/06/2005
70/30 Split	12/10/2005	12/10/2005
60/40 Split	12/13/2005	12/13/2005

3. When the **Appraiser Fees** screen loads, click **Add** to create a new fee split table.
4. Using the drop-down list, select each of the products you wish to add to this fee table and then click **Add**.
5. When finished, choose whether to split the fee by percentage or dollar figure and enter the fee split amounts in the fields provided.
6. Once you have completed your fee split table, click **OK**.
7. Repeat this process to create any additional fee split tables as necessary.

Task: Assign Fee Splits to appraisers

1. From your XSite's Business Management tools, click **Options** in the **Navigation** pane on the left.
2. Click Appraiser Options below the Navigation pane.
3. The list of appraisers you've set up for your office appears. Choose the appropriate fee split tables for each appraiser using the drop-down lists on the right.
4. If necessary, click **Add** to create a new appraiser or click to select an existing appraiser and click **Edit** to update the contact information for that appraiser.

Linking WinTOTAL to an XSite

The easiest way to share orders from your company with remote appraisers is via your XSite. This is also beneficial for multiple appraisers in one location, as each appraiser can then update their order's status directly. For this system to work, each appraiser must configure their copy of WinTOTAL to link with the company XSite, using their own user account.

Task: Set up a link from WinTOTAL to an XSite

1. In WinTOTAL's Appraisal Desktop, click **net.X Connect** in the toolbar.
2. At the bottom of the window, click **Configure net.X Connect.**
3. When prompted, locate the current XSite User in the list, the click **Edit** to the right.

4. Type the **Username** and **Password** for the appropriate XSite user profile, then click **OK**.

Task: Synchronizing Contacts

1. In WinTOTAL's Appraisal Desktop, open the **Contacts** PowerView.
2. At the top of the window, click **Sync**, then choose **XSite**.

Task: Synchronizing WinTOTAL with your XSite

1. From the WinTOTAL Appraisal Desktop, click **net.X Connect** in the toolbar.
2. When the net.X Connect tool opens, click the check box for the items you'd like to synchronize with WinTOTAL.

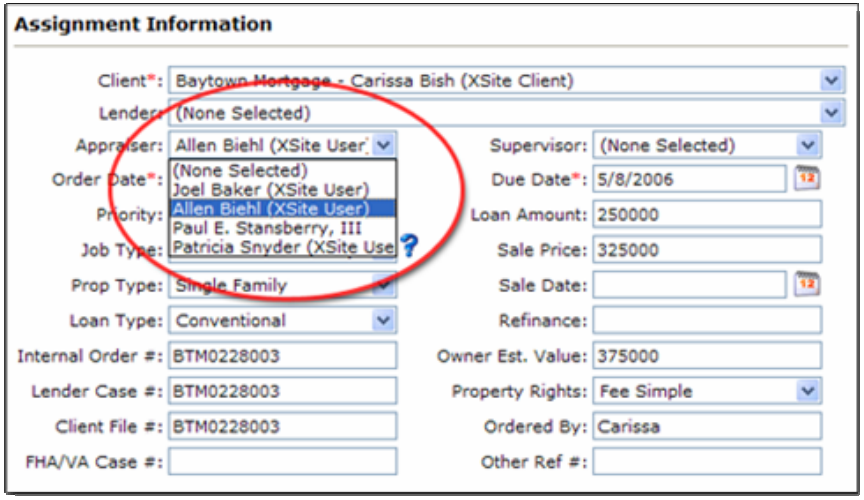
- ❑ **Download New & Changed Orders from your XSite** – This option retrieves any new order information from your XSite. It does not send any information from WinTOTAL up to your site.
- ❑ **Upload New & Changed Orders to your XSite** – Any orders which have changed on your copy of WinTOTAL, including changes to the invoice, or payments received, are displayed in the box. You can select any or all of these orders to have them updated. This only updates the order files. No status updates are sent.
- ❑ **Send Status and/or Client Notifications –** Like the order changes, any status updates that you've set from within WinTOTAL, that you haven't already sent, are listed in the box. Select the items you'd like to send at this time.
- ❑ **Send New and Updated Files to the Vault –** If you'd like to back up your changed files in your XSite's Vault immediately, select this option. The tool will scan your WinTOTAL folders and upload all files which have been changed.

***Note**: This does not turn off the automatic backup process you have configured using the Vault configuration tool. Likewise, if you upload files using this tool, those files will not be resent when your Vault backup process runs.*

3. Click **Connect** to launch the synchronization process.

Assigning and Re-assigning Orders

Orders can be assigned to any appraiser with a user account on wither WinTOTAL or your XSite. Of course, to share orders via the XSite, an appraiser must have an XSite user account. At that point, an order can be assigned, or re-assigned, from either the XSite, or directly within WinTOTAL.



Task: Assign an order from an XSite

1. From your XSite's Business Management tools, click **Orders** in the **Navigation** pane on the left.
2. Use the **Find** field to search for any existing order. Double-click the order to open it and then click **Edit** in the toolbar to modify it.
3. Near the top of the order form, select the **Appraiser** to whom you are assigning the order from the drop-down list. You can also select a **Supervisor** appraiser from that drop-down list, if desired.
4. When finished, click **OK** at the bottom of the order form.

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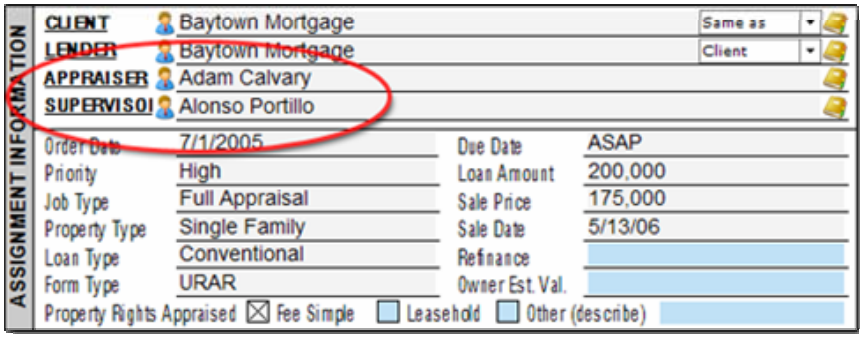
Task: Assign an order from WinTOTAL

1. Open any report in WinTOTAL and click **Order** in the toolbar to open the **Order** PowerView.
2. Click the business man icon beside the **Appraiser** field at the top of the order form and select the appraiser to whom you're assigning the order. You can also select a supervisor, if desired, by clicking the same icon next to the **Supervisor** field.
3. Click **Save** when finished.

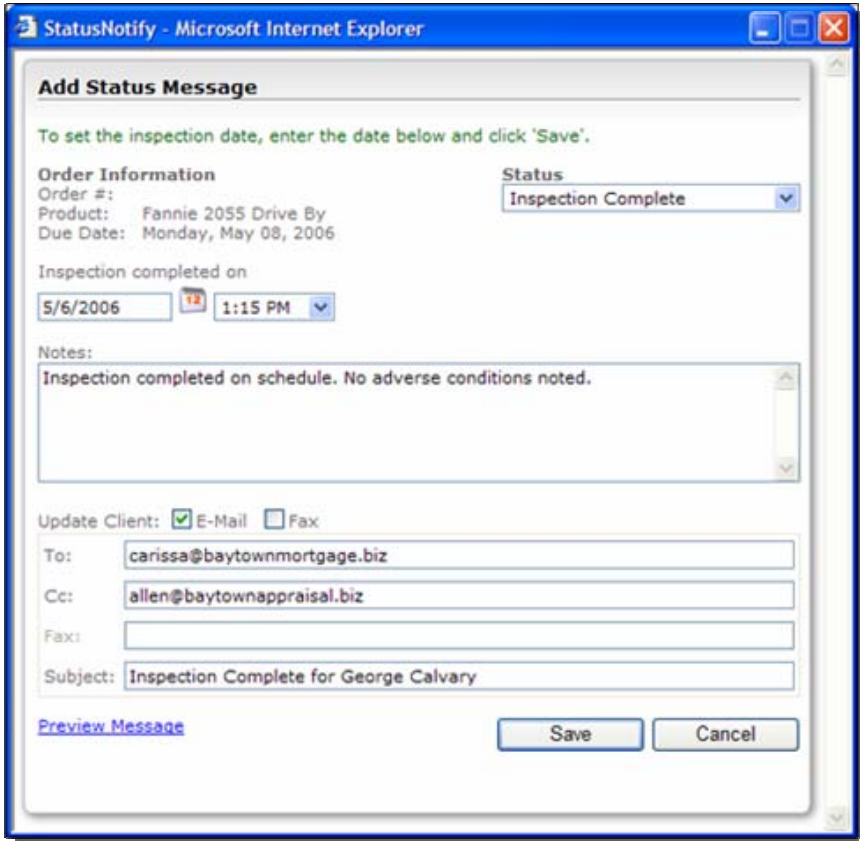


Updating Status

One of the advantages to using WinTOTAL and your XSite to facilitate collaboration between appraisers is that you can use the integrated status update tools to notify not only the client, but also any other appraisers or administrative staff at the same time. The status of a report can be updated from within WinTOTAL, or from the XSite – including the Mobile XSite – whenever necessary. If desired, updates can be sent directly to the client via e-mail or fax whenever they change.

Task: Update the status of an order through an XSite

1. From your XSite's Business Management tools, click **Orders** in the **Navigation** pane on the left.
2. Use the **Find** field to search for any existing order. Double-click the order to open it and then click **Edit** in the toolbar to modify it.



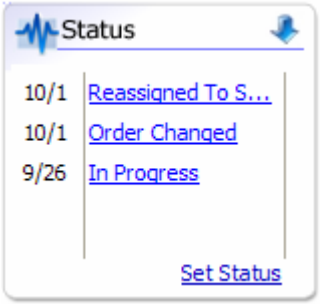
3. When the **Order Details** screen appears, click **Status** in the toolbar.
4. Select a new status from the drop-down menu, then enter any desired comments in the **Notes** field. If you've chosen either of the Inspection status items (Scheduled or Complete), fill out the date in the provided boxes. If the order status is Complete, you also have the option of uploading the report PDF from here – though this won't be necessary if you use the XSite Delivery Wizard in WinTOTAL.
5. Next, decide if you'd like your client to receive a copy of this status update by clicking either the **E-Mail** or **Fax** option. If neither of

these options is selected, then the status update will be reflected on the XSite and in WinTOTAL, but the customer will not get a notification.

***Note**: Even if you don't send an e-mail or fax notification to your client, they'll still be able to see your Notes when they view the status of the order on your XSite.*

6. If you'd like to send a status update to a fellow appraiser or administrator at the same time, simply type their e-mail address (or fax number) into the appropriate field.
7. Click **Save** to update the status and send your message.

Task: Update the status of an order in WinTOTAL



1. With any report open in WinTOTAL, click **Set Status** in the **Status** pane on the left.
2. Select a new status from the drop-down menu, then enter any desired comments in the **Notes** field. If you've chosen either of the Inspection status items (Scheduled or Complete), fill out the date in the provided boxes.
3. Next, decide if you'd like your client to receive a copy of this status update by clicking **Send Client Notification via XSite** option. If this options is not selected, then the status update will be reflected on the XSite and in WinTOTAL, but the customer will not get a notification.

***Note**: Even if you don't send a status notification to your client, they'll still be able to see your Notes when they view the status of the order on your XSite.*

4. If you'd like to send a status update to a fellow appraiser or administrator at the same time, simply type their e-mail address into the appropriate field.
5. Click **Send Later** to add this update to the queue of messages and updates to be sent the next time you synchronize your copy of WinTOTAL with your XSite. Or, click **Send Now** to update the status and send any notifications immediately.

*Hint: You can also update the status of a report from WinTOTAL's Appraisal Desktop, without the need to open the report first. This can be handy when an administrator needs to update several files at once. In the Appraisal Desktop, just click the Plus sign next to the desired file to open the File Detail view. Then, click the **Add New** link to the right of the photo. Now, follow the directions above to update the status.*

Sharing Comments

Of course, collaborating with other appraisers on a report often requires communicating information about the report and its contents. You've seen how this can be accomplished with the **Status** update tools. However, more information can be communicated within the report using WinTOTAL's QuickNotes tool. When a report file is opened, the appraiser can quickly see any comments left by another appraiser or supervisor in the relevant section of the report. These are internal messages only, and won't be displayed to the client or included in the final report.

Task: Enter QuickNotes comments

1. With any report open in WinTOTAL, click the desired note icon (Yellow, Red, Green) in the toolbar.
2. Click the area of the form where you want note to appear.
3. Type your comments in the text box which appears.
4. Click the **X** in upper right corner of the window to close and save your note.

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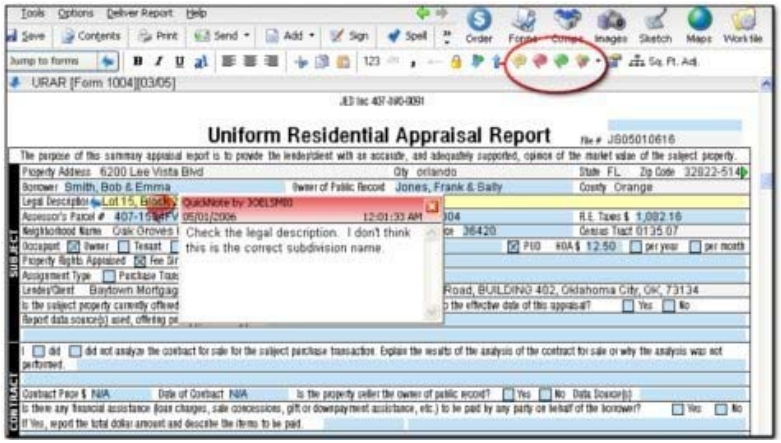


The note is placed in your document shown as a semi-transparent balloon.

- If you need to reposition the note, just click and drag the balloon to another location.
- To read a note, double-click the balloon.
- To change the type of note, right-click on the balloon, then choose **QuickNote Type** and select the desired note type.
- To remove a note from your report, right-click the balloon and choose **Delete**.
- To choose how QuickNotes are displayed in the report, click the **Show QuickNotes** icon and select whether to **Hide all QuickNotes**, display only those of one kind, **Open all QuickNotes** in the document, or **Close all QuickNotes**.

Sending Reports

When working with multiple appraisers, it's critical that share your report files in such a way that you don't inadvertently end up creating multiple copies of the same file. Of course, with remote appraisers working on systems apart from the network, this is inevitable – there is one copy of the file on the network server, and another at the remote appraisers office. But using the proper e-mail tools to transport the file helps ensure that the two versions of the file are kept in sync.

***Hint**: While the Vault can be used to share files among appraisers in different offices, this is not it's intended purpose and it does not include the file merging capabilities available when using e-mail delivery. Thus, using e-mail to share report files is recommended.*

Task: Share a report via e-mail

1. In WinTOTAL, complete your report, to the point it is ready to share with another appraiser.
2. Click **Deliver Report**, then **WinTOTAL Report using Outlook or regular e-mail.**
3. If the report is un-signed, you're asked if you want to continue. If so, choose **Yes**.
4. Complete the report delivery screen, making sure you replace your client's e-mail address with your colleague's. You can select either the Supervisor's or Appraiser's address from the drop-down list.
5. Select the options you want to send along with the file (worksheet, invoice, photos, digital workfile) and complete any additional information in the text box.

***Hint**: Bear in mind that photos and the workfile can add a lot of overhead to your report. If you're only sending the report to a colleague for review, you may not need to include these items.*

6. Click **Finish** to create your e-mail message. When the message appears in your e-mail client, click **Send** to deliver it.

Task: Retrieve a report from e-mail

1. When a colleague sends you a report via e-mail, first open the message in your e-mail client. Attached to that message will be a .ZAP file.
2. In most e-mail software programs, you can double-click the file to open it. If prompted, click **Open**.

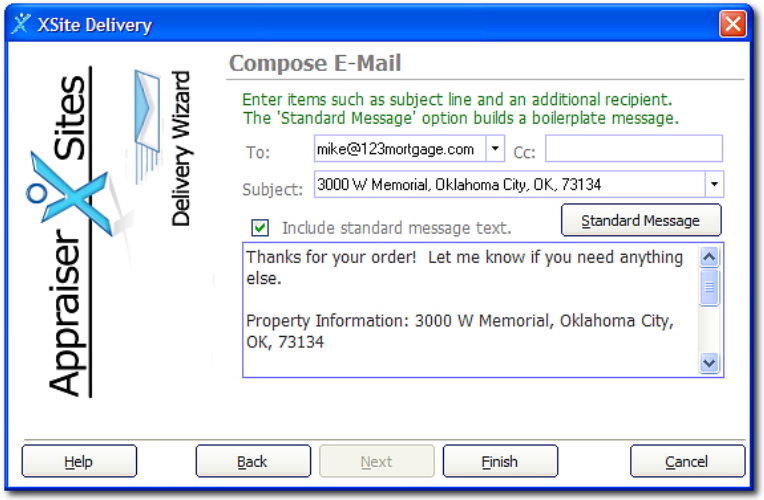
***Note**: If your system doesn't support this (if you're logging into a web client, for example) you may need to save the attachment on your hard drive. Do NOT save the file in your WinTOTAL file directory! Instead, save it to temporary location. Then, locate the file and double-click to open it.*

3. When you try to open a ZAP file, WinTOTAL first scans your files to determine if the incoming report is a copy of an existing report. If so, you'll see both files listed in the **Update WinTOTAL Report** window. If the new report matches more than one report on your system, all similar reports are displayed in the lower list.
4. Select the appropriate file from the lower list and click **Replace.**
5. The new report replaces the older version on your hard drive and opens in WinTOTAL, displaying the updated information.

***Note**: This is a file replacement process, not a merge. If you need to retain information from both the old and new files, you should instead choose to create a **New** copy of the report in the **Update WinTOTAL Report** window. Then, you can use the **SmartMerge** feature to merge the two files together.*

Task: Deliver a report via an XSite

1. Sign the report and mark the **Set report status to complete** and **Deliver report using XSite Delivery Wizard** options at the bottom of the **Sign** window to instantly deliver it to your XSite.
2. The **Aurora Print Engine** appears, allowing you to select which forms in your report you want included in the final document. Select the forms you'd like included in your report — and set any other options necessary — and then click **OK**.
3. Now you're presented with the XSites Delivery Wizard. Click **Next** to launch the process.
4. Every time you run the wizard, the first task it performs is to check for the latest plugin updates. Once the updates are loaded, click **Next**.
5. The next step in the wizard presents you with the results of an Errors and Omissions review of your report. Confirm that the report is acceptable, then click **Next**. You can click **E&O Details** to get more information about the errors that may have been found, or click **View PDF** to check the PDF file you created. If you do find a problem that needs to be corrected, click **Cancel** to leave the wizard and return to WinTOTAL. Modify the report as needed, then start the process over.
6. The next screen gives you the option of creating a customized e-mail message for your client. If you choose not to use one, then the wizard generates a generic message. However, most clients appreciate a personal touch, so check the **Custom e-mail** box. Also, if you want to attach an electronic copy of the report to your message, click the **Attach PDF to message** box as well. Then click **Next**.
7. If you chose to create a custom e-mail message, the next step allows you to create your own personalized message. Complete the necessary fields with your client's contact information. You can a



fill in most of this information based on the customer information from your report by clicking the drop-down menus to see the automated information available for each field.

8. If necessary, you can also insert text directly into the e-mail message that is sent using information from your report. Check the **Include standard message text** box, then click **Standard Message** to edit the default text.

9. Type the standard message you'd like included in the e-mail message that accompanies the link to the report on your XSite. Then, from the list, check the boxes for the any of the report items you'd also like to insert in the message. Finally, type your "signature block" in the final box and click **Save**. Now, each time you send a report, this standard text is automatically inserted into the message. Of course, on each report, you can easily edit the default text should you find you need to change it in the future.

10. Click **Finish** to deliver the message to your client.

Using the Vault

The Vault was designed and built as a backup and disaster recovery tool. As such, it can play a key role in ensuring that your company's report files are backed up regularly, whether they reside on your office's network server or an a remote appraiser's home office system. As long as you've provided Vault access to your remote appraisers through the User Profile settings, they can save and retrieve files from your Vault at will.

When a file is uploaded to the Vault, whether manually or through the automated backup feature, the latest version of that file will overwrite the existing version on the Vault. This is true whether the file is uploaded from the same system, or from a second computer that happens to have a copy of the report file.

***Note**: While the Vault can be used as a tool to share reports with remote appraisers, it was not designed with this purpose in mind, and may lead to duplicate files being created. For this reason, we recommend you use e-mail delivery to share files, rather than the Vault.*

Sending files to the Vault can be automated, using the Vault Configuration tool. Or, files can be sent on a file-by-file basis. To ensure that files don't get duplicated or accidentally overwritten, we recommend that remote appraisers not configure their system to automatically back up files. Instead, they should use the manual upload method.

***Hint**: If you want to ensure that remote appraisers have an automated backup system, while maintaining the integrity of the office files, you can configure remote offices with their own Vault account.*

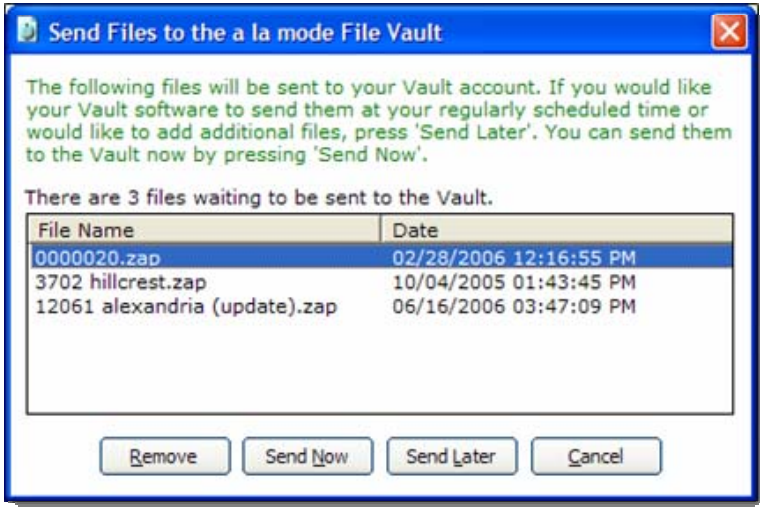
Task: Send a report to the Vault

1. From WinTOTAL's Appraisal Desktop, locate and select the file or files you'd like to send to the Vault. (Use Ctrl+Click to select multiple files.)

2. Click **Send to Vault** in the toolbar.

3. Review the files listed to be sent, then click **Send Now**.

*Note: If you click **Send Later**, you must have the Vault configured to automatically upload your files at a scheduled time.*



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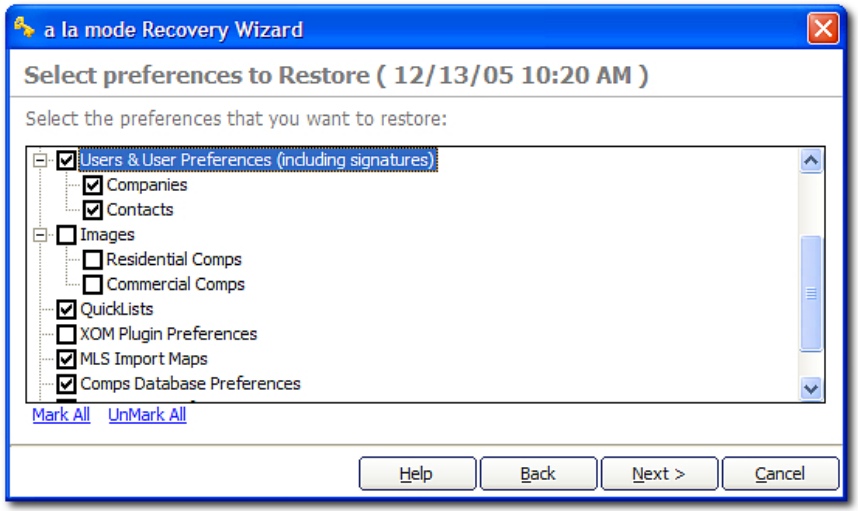
Sharing Resources Through Exact

One of the features of the Vault is the Exact utility. This tool allows you to back up not only your individual reports, but also your QuickLists, Comps database and other items. This can be particularly useful if you wish to share these resources with appraisers in remote offices.

Once you've configured the Exact to backup your system profiles, any remote appraise can configure his or her system with the same Exact account, then download the "corporate edition" of any of these databases.

Task: Download databases using Exact

1. From the Windows Start menu, choose **a la mode Vault**, then **Recover your Preferences**.
2. Click **Next** to start the **Recovery Wizard**.
3. Select the appropriate Internet connection type (LAN or dial-up) and click **Next**.
4. Enter your a la mode **Username** and **Password**, then click **Next**.



5. Choose **Advanced Recover**, then click **Next** to continue.
6. Select the date of the recovery file you wish to use, then click **Next**.
7. From the list of options, check the box next to those items which you'd like to restore, then click **Next**.
8. The wizard completes the download and informs you when it is complete. Click **Finish**.

Associating local reports with XSite orders

From time to time, you may find that your process gets out of order and a report is created from within WinTOTAL at the same time as an order is created on your XSite. When that happens, you can associate the report with the proper order using a simple WinTOTAL utility.

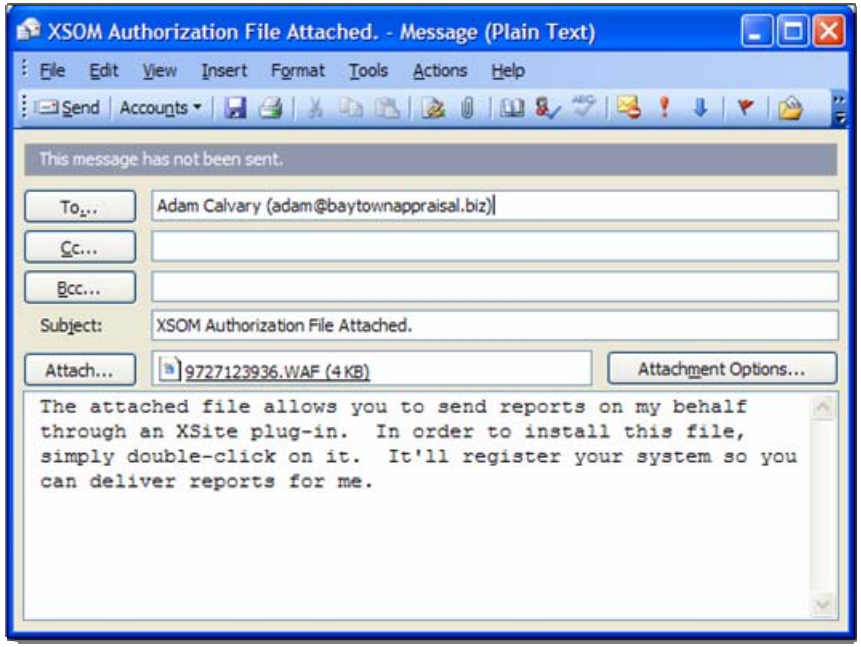
Task: Associate a report with an XSite order

1. From inside the report you wish to associate with an XSite order, click the **Tools** menu, then choose **Associate XSite Order**.

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. Click **Yes** to delete it.

Allowing other appraisers to deliver reports through your XSite

If you're going to collaborate with appraisers that have their own copy of WinTOTAL, another step may be necessary before they can deliver reports through your XSite. This is only an issue when a second appraiser's copy of WinTOTAL is authorized under a different customer number than yours. When this is the case, that appraiser must have a copy of your "WinTOTAL Authorization File," or WAF, before he or she can deliver a report through your XSite.



Hint: The WAF file is only required if you want the second appraiser to deliver the file directly. If, instead, the file is returned to you for final review and deliver, no WAF file is needed.

Task: Create a WinTOTAL Authorization File

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

Task: Install a WAF

1. Make sure your PC has the latest WinTOTAL updates before installing the authorization file.
2. Open the e-mail message you received with the WAF attachment and double-click the attachment.
3. WinTOTAL automatically opens and registers the authorization.