

Extending Forms with Custom Calcs and Addenda

presented by a la mode



Course Highlights

- Automate your valuation models using data from reports
- Build custom entry fields based on other entries
- Manipulate text fields
- Create dynamic addenda with data that updates automatically

Extending Forms with Custom Calcs and Addenda

Introduction to Extending Forms with Custom Calcs and Addenda

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An appraisal is only as good as the data that goes into it. Today's modern appraiser uses a multitude of financial models to arrive at a final valuation. This course teaches you how to automate those models to increase the accuracy of your reports while eliminating the need to reach for a calculator. Plus, you'll learn how to use data from your reports in integrated custom addenda.

Worksheet calculations

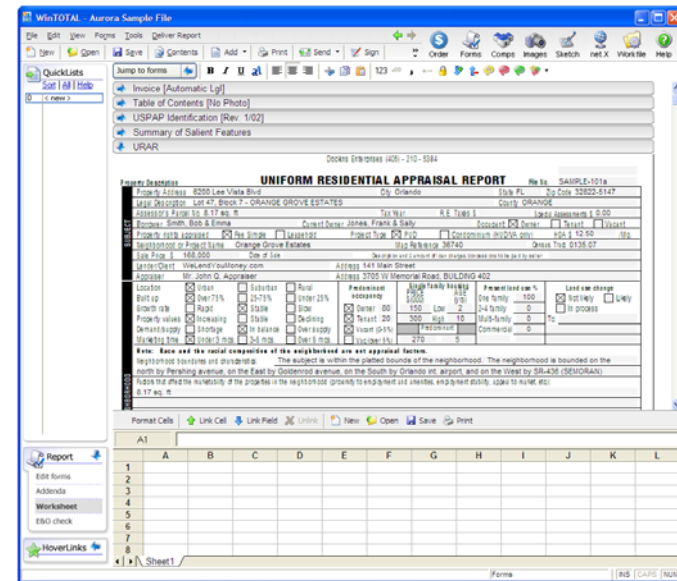
WinTOTAL includes numerous automatic calculations. And yet, there's no way that our programmers can anticipate everything you might want to calculate in the course of your appraisal. Luckily, the Worksheet feature allows you to take control and create sophisticated models based on data in your reports. Based on industry-standard spreadsheet capabilities, worksheets can include mathematical and statistical formulas, as well as handle text manipulation. While worksheets do not print as part of your report, you can utilize calculated data by inserting it into your forms.

Creating a worksheet

Worksheets can be created from scratch within WinTOTAL, or created in a Microsoft Excel-compatible application, then loaded into WinTOTAL. Some considerations to remember:

- ❑ Only one worksheet can be attached to a report. However, any worksheet can have multiple calculations in it.
- ❑ Worksheets can pull data from more than one form in your report.
- ❑ While primarily used to manipulate data, worksheets can also be used to simply transfer data from one field to another.

To create a worksheet, from the **Forms PowerView** in WinTOTAL, click **Worksheet** in the **Report** pane. You'll see a split screen with your report's forms at the top and a spreadsheet at the bottom.



Using existing spreadsheets

If you've already created a spreadsheet in an application like MS Excel, or have one from a previous version of WinTOTAL, you can quickly load that into your current report:




1. First, in your spreadsheet application, save your work in an MS Excel 5.0 format.
2. From the **Forms PowerView**, click on the **Worksheet** button on the **Report** pane.
3. Click the **Open** button from the lower toolbar.
4. Browse your system and select the spreadsheet you wish to use, then click **Open**. Your custom spreadsheet appears in the WinTOTAL worksheet – replacing whatever spreadsheet you had before.

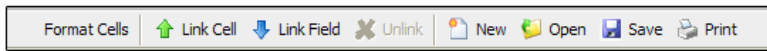
Note: You can use **Copy and Paste** to get your spreadsheet from Excel into WinTOTAL, but when you paste, only the text labels get pasted in. You'll have to copy your formulas individually.

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Linking fields




Once your worksheet is open, you can link data from a form into any cell in the worksheet.

1. From the worksheet view, you should be able to see the form and the worksheet.
2. Place your cursor in the worksheet cell where you want to insert data from a report field.
3. Now, select the field in the form that you want in the worksheet. Use the **Collapse All**  and **Expand All**  buttons, or click **Jump to forms** to display the desired form.
4. Click  **Link Field**. The cell in your spreadsheet turns red to indicate it is a linked field.



You'll see the field data from the form transfer into the worksheet cell. To demonstrate that it is a live link, change the field on the form and watch it change the worksheet when your cursor leaves the field!


Taking data from your worksheet and inserting it into a form is just the reverse:

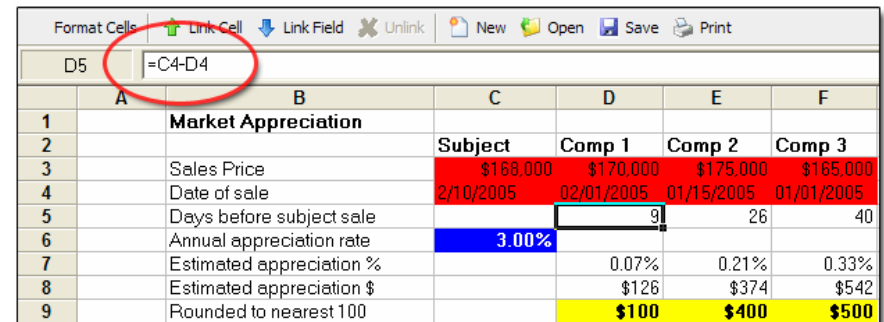
1. From the worksheet view, you should be able to see the form and the worksheet.
2. Place your cursor in the worksheet cell containing the data you want to place in your form.
3. Now, select the desired field in the form. Use the **Collapse All**  and **Expand All**  buttons, or **Jump to forms** to display the desired form.
4. Click  **Link Cell**. The cell turns yellow indicating that it is a linked field.

Entering formulas


Entering formulas in a worksheet is the same as most spreadsheets. Begin a formula by typing the equal sign (=). Now, click in any other cell to use the contents of that cell in your calculation. For example, to add the contents of two cells:

1. Select the cell that will contain the calculation and type =.
2. Click on the cell containing the first number you want to add.
3. Type the plus sign (+) on your keyboard.
4. Click on the cell containing the second number and press **Enter**. The sum of the two numbers will display in the cell.

 **Note:** Note that the cells you're adding may be linked to data in your form or other cells in which you've manually entered numbers.



	A	B	C	D	E	F
1		Market Appreciation				
2			Subject	Comp 1	Comp 2	Comp 3
3		Sales Price	\$168,000	\$170,000	\$175,000	\$165,000
4		Date of sale	2/10/2005	02/01/2005	01/15/2005	01/01/2005
5		Days before subject sale		9	26	40
6		Annual appreciation rate	3.00%			
7		Estimated appreciation %		0.07%	0.21%	0.33%
8		Estimated appreciation \$		\$126	\$374	\$542
9		Rounded to nearest 100		\$100	\$400	\$500

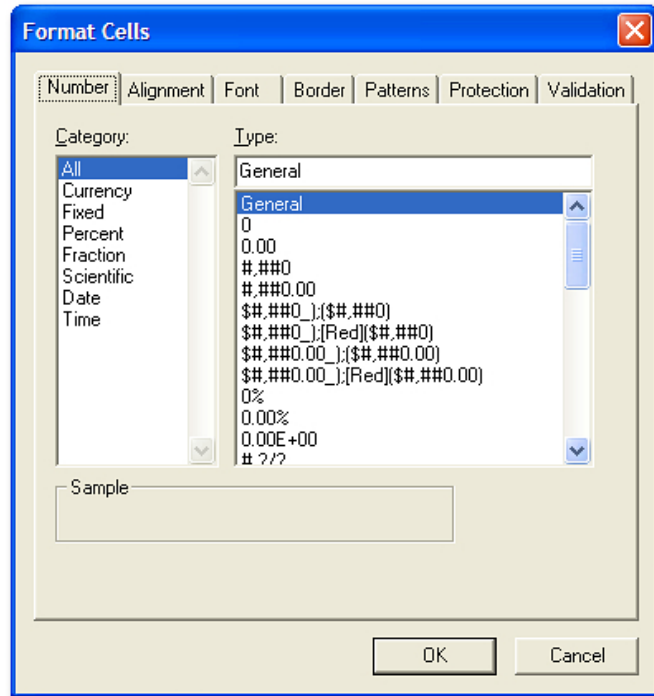
 **Hint:** Not all formulas are as simple as adding two fields. WinTOTAL worksheets support most of the mathematical, statistical and text handling formulas found in MS Excel. If you're building a complex, multipart formula, it is often easier to create that formula in Excel. Then you can save the Excel spreadsheet and load it into WinTOTAL and create the desired links to and from your spreadsheet. This allows you to use Excel's formula help and troubleshooting tools to fine tune your formula.

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Formatting worksheets

To add formatting to the cells in your worksheet:

1. Select the appropriate cells, then click **Format Cells**. Or, right-click and choose **Format Cells** from the pop-up menu.



2. From the dialog box, change the number formatting, cell alignment, font, borders, fill pattern and protection.
3. Click **OK**.

Note: Use these formatting options to make your worksheets easier to use. For example, since linked fields are colored red and yellow, you might color data entry cells blue. Also, to preserve your formulas from being accidentally overwritten or deleted, use the protection formatting. Finally, remember that formatting applied in the worksheet does not transfer up to the form.

Saving and reusing spreadsheets

1. Once you're finished designing your worksheet, click the **Save** button just above the worksheet.
2. Give the spreadsheet a name so you can identify it later, and click **Save**.

Automated Addenda

WinTOTAL's Addenda feature gives you unparalleled power in creating narrative supplements to your appraisal reports. Based on proven word processing technology, the **Addenda PowerView** gives you access to most of the advanced tools found in products like Microsoft Word, including tables. In fact, you can load documents created in your word processor directly into an addendum. But WinTOTAL's addenda give you one capability you won't find in MS Word: you can link any field from any form – or multiple forms – directly into your addendum. As your report changes, your addendum is automatically updated.

Creating an Addendum

Addenda can be created in three different manners:

Text Overflow – As you are entering text into any multi-line field in a form, WinTOTAL knows how much text can fit in that field. Once you've reached that capacity, the program automatically prompts you to create an addendum.

1. In any WinTOTAL form, click on a multi-line comment field and begin typing.
2. As you reach the end of the field, a dialog box appears prompting you to create an addendum.
3. Choose whether you'd like the entire contents of the text field moved to the addendum, or just the portion that doesn't fit on the form by clicking the appropriate radio button.
4. Click **OK**.

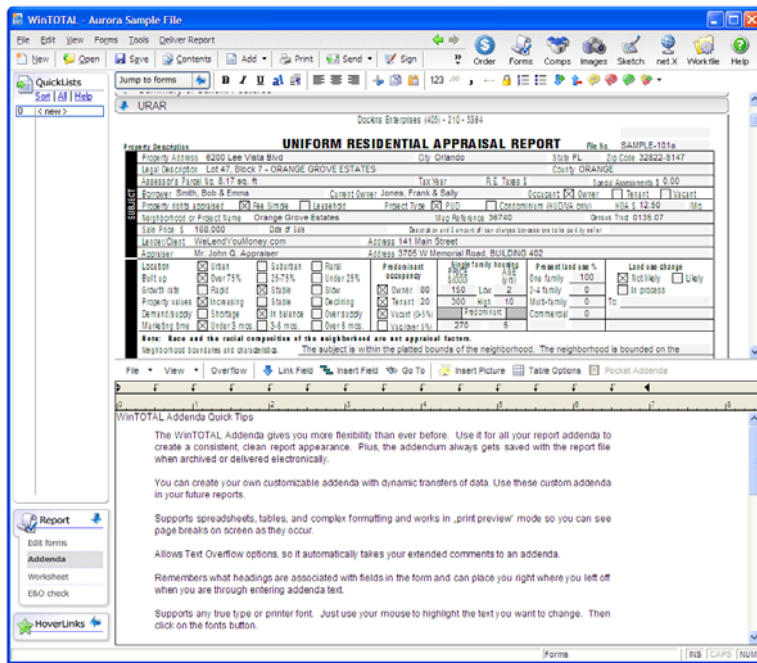
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Select an Addendum Form – If there's a particular addendum form you wish to use, you can simply add the form to the report using the Contents feature.

1. From WinTOTAL, click **Contents** on the menu bar.
- Scroll down through the **Available forms** list and double-click the folder titled **Other Forms & Addenda**.
- Find the desired addendum form and double-click it.
- In the **Forms in my report** list, double-click the new addendum form name again to open it for editing in WinTOTAL.

Split-screen addenda – This method is quick and allows you to view the contents of your forms while you're editing your addendum.

1. In the **Forms PowerView**, click **Addenda** on the **Report** pane.



Creating tables and columns

Tables are handy for showing structured lists or creating columns in your document. To create a table in an addendum:

1. From any addendum form, click the **Table Options** button, and choose **Insert Table**.
2. Specify the number of rows and columns you would like to see.

Note: There is no way to change the number of rows and columns for the table once it is inserted.

3. Click **OK**.

Once a table is inserted, you can customize its look.

1. While your cursor is in the table, click the **Table Options** button again.
2. Choose **Edit Table** or **Edit Cells**.
3. Select the desired modifications from the dialog box and click **OK**.

Inserting images




Here, you can put in logos, pictures of properties or essentially anything inline with your addendum text.

1. From any addendum form, click the **Insert Picture** button.
2. Browse to the directory where your image is stored, select the file and click **Open**.
3. Double-click the image to re-size it to better fit within your text.

Linking to fields in the form

A key feature in the **Addenda PowerView** is the ability to place hot links to fields from your appraisal forms. This is useful for making boilerplate addenda such as the cover letter that automatically has the address, value or other information. Here's how it works.

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1. From the **Forms PowerView**, click the **Addenda** button in the **Report** pane. You should be able to see the form and the addendum.
2. Place your cursor in the addendum where you want to insert data from a report field.
3. Now, select the field in the form that you want in the addenda. Use the **Collapse All**  and **Expand All**  buttons, or **Jump to forms** , to display the desired form.
4. Click  **Link Field**.

You'll see the field from the form transfer into the addenda. To demonstrate that it is a live link, change the field on the form and watch it change the addenda when your cursor leaves the field! You can link fields from multiple forms in the report, too.

If you don't like scrolling around your forms in the split screen view, there is another way to insert fields from your report's major form:

1. From any addendum form, click **Insert Field**.
2. A menu appears showing the form's major sections. Click the section you would like to use.
3. Fields from that section are listed alphabetically. The arrow at the bottom of the list is for you to scroll. Click the field from that list, and it is inserted into your addenda.

Saving your custom addenda for future use

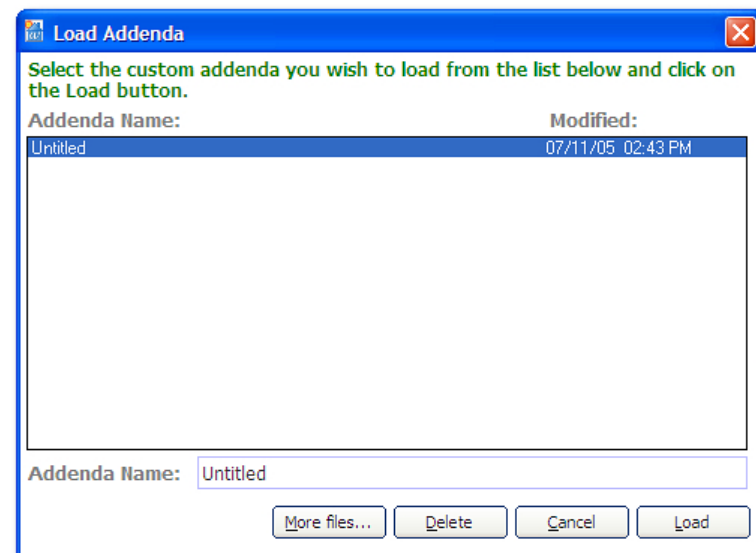
With the powerful formatting and ability to link live fields, it is likely you will build up a library of addenda to reuse.

1. Once you've completed an addendum "template," click the **File** button just above the addendum.
2. Click **Save**, give the addenda a name so you can identify it later, and click **Save**.

Using previously saved custom addenda

Once you've built your library of custom addenda, using them in your reports is a matter of a few clicks.

1. From the **Forms PowerView**, click the **Addenda** button on the **Report** pane.
2. Click the **File** button from the lower toolbar and choose **Load**.



3. Select the addendum you wish to use and then click **Load**. Your custom addendum should now appear in your report – replacing whatever addendum you had before. And any linked field in the addendum is updated with information from the current report.

NOTES:
