Online Order Management

presented by a la mode

Course Highlights

- Eliminate phone calls and faxing with online ordering
- Manage orders, boost service levels and reduce turn-around times
- Deliver your reports securely and efficiently

Online Order Management

Introduction to Online Order Management

The modern appraiser is no longer bound by the limitations inherent in phone and fax communications. For too long, you and your customers have relied on sending orders via a fax, then calling (often repeatedly) to update the status of each order. Now, advancements in Internet technologies have made it easer than ever to launch and manage a true, online order management system.

Building Better Customer Service

Having a Website as an online billboard to attract and educate clients is a given in today's business environment. Your Website becomes even more valuable when it provides a true service with proven time savings for you and your clients. That's why online appraisal ordering is one of the most popular Appraiser XSite features.

- ❑ Status and notes for any order can be viewed 24/7. This eliminates phone tag. Just think: Every phone message someone must either leave or return saves a few minutes. Those extra minutes add up to better turnaround time and better service.
- ❑ When orders are processed through an Appraiser XSite, the final report PDF can be downloaded at any point in the future. Ever need to resend an appraisal because the original e-mail was lost or never got to the recipient? We know it happens all the time. Viruses and unwanted spam have made e-mail almost unusable, so bypass it altogether by posting information on your business website.

Tools of the Trade

So what tools are needed to create an online ordering system?

A Website – The single biggest piece of the puzzle is your Appraiser XSite. A well-designed site provides an opportunity to promote your business, as well as a platform for enabling your online ordering. Done right, it becomes the single point of contact for all your customer's needs.

Ordering and Delivery Tools – Once your XSite is launched, the next key piece is the ordering and delivery mechanism. The XSite Network technology platform built by a la mode enables ordering through an XSite, while WinTOTAL Aurora provides an easy to use application for managing orders and delivering reports.

Formfilling Application – The integration between your web site, ordering system and formfilling application is key to efficient operation. True efficiency is achieved when orders from a website can be turned into an active report without re-keying information. Likewise, the ability to seamlessly deliver the completed report with a minimum of steps adds to the overall savings in time and effort.

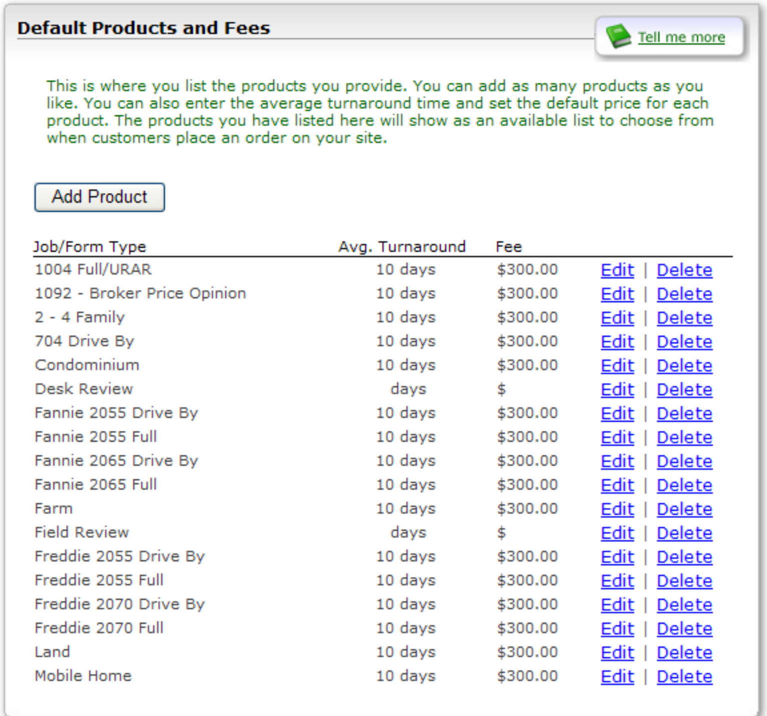
Configuring your XSite to Receive and Manage Orders

Enabling online ordering and order management tools on your XSite involves only 3 simple steps. We'll cover each of these in detail and show you how to get your XSite's online ordering off the ground.

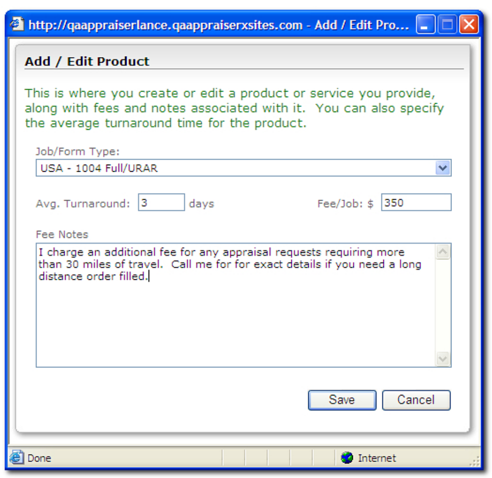
Step 1: Defining the products and fees you offer

To take full advantage of your XSite's order management tools and prep the site to begin receiving orders, you first have to setup your list of products and their associated prices. To setup your fees so that you can enable online ordering in your XSite and begin taking orders:

1. Login to your XSite and click **Business Management** from the **My Office** screen.
2. Once the **Business Management** screen appears, click **Options** in the **Navigation** pane on the left.
3. By default, you have one fee table that contains a list of products and fees you provide. You can edit this table and add products to it or change the fees you charge for those products. You can also create additional custom fee tables and assign them to specific customers allowing you to have custom fees for special cases.



4. To add products to your fee table, simply click the **Add Product** button at the top of the list.
5. Once the **Add/Edit Product** window appears, click the drop-down menu and select the product you'd like to add to your product list.



6. Fill out the **Average Turnaround** time, **Fee**, and any **Fee Notes** you have in the respective fields and then click **Save** to add the product.
7. Repeat this process until you have added all of your products to your **Fee Table**.

Step 2: Defining your coverage areas

Now that you've defined your products and fees, you need to update your coverage area to include all the counties you service. Using the coverage area tools, you can add as many counties and states to your coverage are as you like.

To update your coverage area:

1. Login to your XSite and click **Business Management**.
2. When the **Business Management** screen appears, click **Options** in the **Navigation** pane on the left.
3. Next, click the **Coverage** link below the Navigation pane to open your current list of counties covered.
4. Now, click **Add** at the bottom of the screen to add states and counties to your coverage area.
5. A list of all the states in the US and all the provinces in Canada appears. Click the link corresponding to the state or province of your choice.
6. When the list of counties appears, simply check all of the counties that apply to your coverage area. Use the **Select All** and **Clear All** buttons at the bottom of the window to quickly select or deselect all the counties in the state of province of your choice.
7. When you've selected all the applicable counties in the state or province of your choice, either click **Add** at the bottom of the screen to continue adding counties in other states or provinces or click **Done** to return to your completed list of counties covered.

Step 3: Enabling online ordering on your XSite

Once set up your products and coverage areas, you're ready to enable online ordering on your XSite.

1. Login to your XSite and click **XSites Wizard**.
2. Next, click **Online Ordering** in the **Content** menu on the left.
3. When the Online ordering screen loads, simply check the **Enable Online Ordering** box and mark a radio button to either use your existing XSites Network account for online ordering or to create a new profile if you don't already have one.
4. If you chose to create a new XSites Network profile, fill out your **First Name**, **Last Name**, preferred **Username**, and **Password** in the provided boxes and click the **Create New Account** button.
5. Finally, click **Save.**

The Role of Contacts

Contacts in WinTOTAL

Your WinTOTAL Aurora contacts are synchronized with the contacts on your XSite, ensuring that both always have the same set of contacts. No longer must you switch back and forth between the two to find the contact info you need.

Contacts on the XSite

In addition to constant XSite to WinTOTAL contact synchronization, the contacts in your XSite also impact the ordering features within the site. Ultimately, if you create a new client in your XSite or a new client signs up for an account on your XSite, their data is automatically added to your contact database as well.

Client Options and Custom Fee Tables

Your XSite's **Client Fee Tables** improve upon the Fee tables feature you may be familiar with from the older WinTOTAL Athena generation. Now, you can manage your fee tables from any computer without the need for WinTOTAL at all. You can also assign custom fee tables to the variety of different clients that you have in your XSite. Since the clients associated with your XSite are synchronous with your XSite's contacts, you first have to ensure that you've entered a contact for a particular client and created the appropriate fee table before you can assign a custom fee table to the contact.

Appraiser Options

Much as the **Client Options** and fee tables feature in your XSite improves upon the custom fee tables feature in Athena, the **Appraiser Options** features in your XSite improve upon the appraiser specific fees features. Again, this takes the best of Athena and blends in the portability of an XSite so you can manage your appraiser fee tables from anywhere without the need for WinTOTAL – making it great for your Office Manager. Just as with your client fee tables, you'll need to have a contact in your database for the appraiser in question before you can take advantage of this feature.

Order Entry

In tune with the concept of a portable office, the new order entry features in your XSite allow you to enter and edit orders for your clients from anywhere you have internet access. In contrast with the order entry and management features previously in your XSite, you can now edit an order at a later time and can change any information you need to in that order. In addition, you can synchronize these order entry features with Aurora so that you can originate the order from either your XSite or Aurora and ensure that the order shows up in both places.

To enter a new order using your XSite:

1. Login to your XSite and click **Business Management** .
2. Click **Orders** in the **Navigation** pane on the left.
3. When the **Orders** screen appears, simply click **Create a New Order** below the **Navigation** pane on the left.

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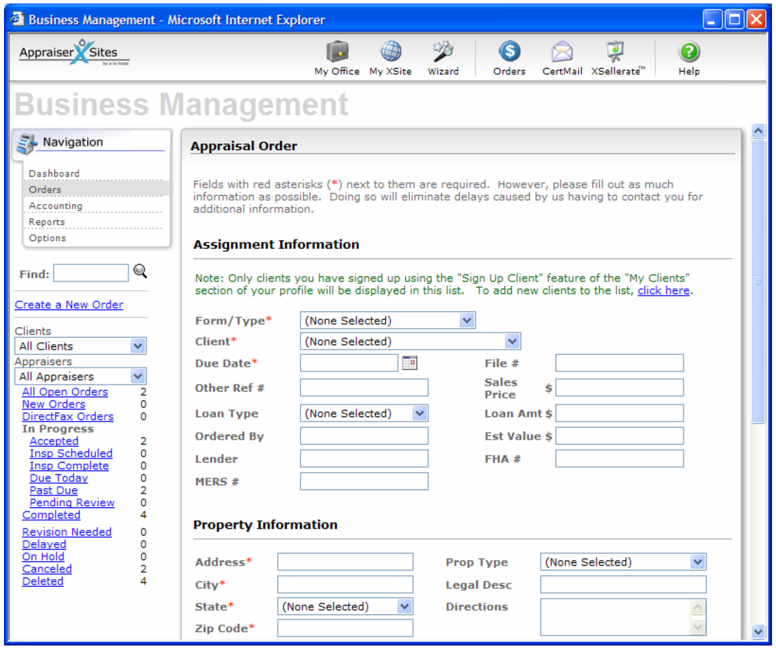

4. Now, simply fill out the order form and click **Send Order** when you're finished.

***Note**: You must be on your clients' **Fee Panels** in order to place orders on their behalf. If you signed your client up for an account on your site, you should already be set up properly.*

Order edit and status updates online (Office Manager)

Any user whose profile you have designated as an **Office Manager** type has the ability to view, edit, and manage orders for the entire office from the **Orders** section of your XSite's **Business Management** tools. In order to do so, you need only log in to your XSite, click **Business Management** and then **Orders** to get to the **Orders** section of your XSite. Then you simply find an existing order and double-click it to edit it.

Order edit and status updates in Aurora (Appraiser)

In contrast with the order creation, management, and editing tools of the **Office Manager** user type, the **Appraiser** user type only has the ability to create, manage, and edit orders assigned to that appraiser. The process for editing an order when using an **Appraiser** account is the same as when editing an order with an **Office Manager** account. Refer to the above section for specific instructions.

Setting up Signatures and Seals

Before you can send your deliver your appraisal reports, you will likely want to sign them. In some areas, that means also affixing your appraisal designation seal to the report. These options are set up in WinTOTAL Aurora's **Configuration Options.**

Before you begin, you must have your signature or seal saved in a graphic file format on your computer. You can create a signature file by signing a blank, white piece of paper, then scanning the signature yourself, or by take it to a local service center. Capture your Seal from a PDF copy of your appraisal certificate, or have it scanned as well. The files should be in either a JPG, GIF, TIFF or other common graphic format.

To add your signature and seal to Aurora:

1. From WinTOTAL, click **Tools**, **Configure**.
2. Click **Select a user** from the General menu on the left.
3. Now, select the user you'd like to configure the signature or seal for and click **Edit**.
4. From the **Edit User** dialog box, click the **Select** link under either **Signature** or **Seal** on the right side of the screen.
5. Navigate through your hard drive to find your file. Select it and click **Open**.

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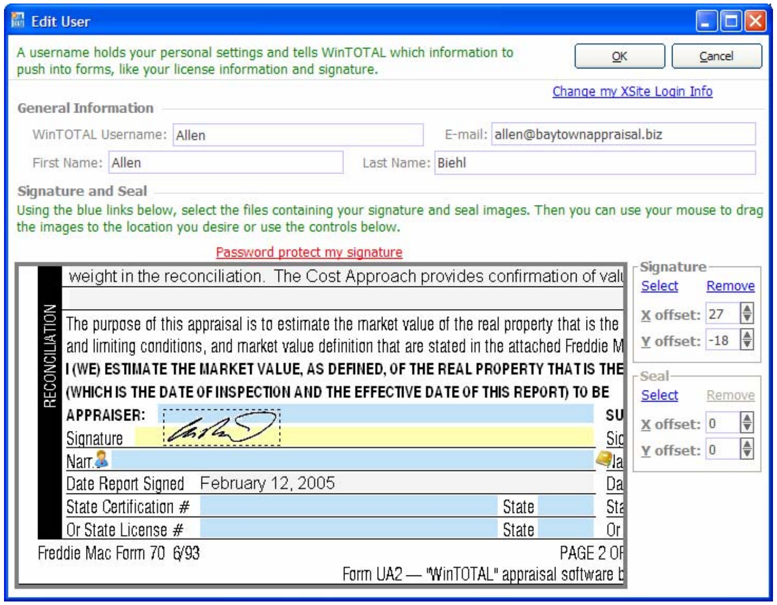

6. Your signature and seal are displayed on the sample form. Click and drag either image to position it properly on the signature line.

***Hint**: While the your signature may appear properly placed in this dialog box, it may not print exactly as you desire on your forms. Before continuing, you should load an appraisal report, sign it and print the final page to ensure proper placement.*

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7. Once your signature and seal are placed, click the link to **Password protect my signature**. This ensures that nobody can place your signature on a report without knowing your password.
8. Type a password into the field and click **OK**.

Signing the Report

When your report is complete and ready to deliver, it's time to sign the report. This is an important step in the electronic world, as applying your digital signature also "locks" the report so it can no longer be changed.

The process for signing a report is the same whether you are signing as an Appraiser or Supervisor.

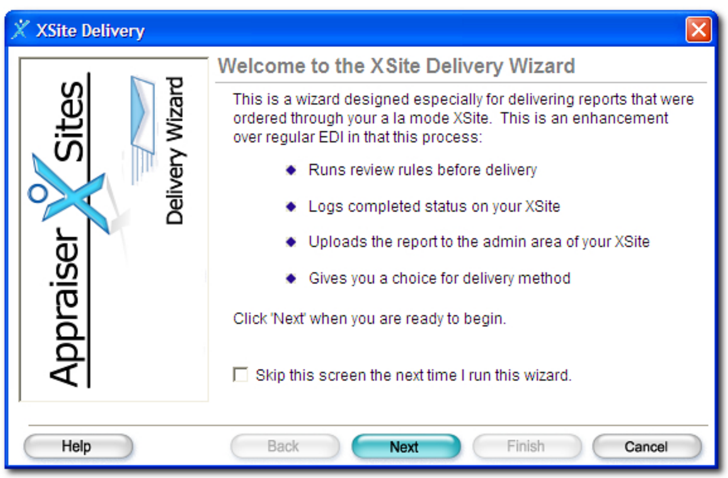
1. Once the report is complete, click the **Sign** button in the menu bar, or choose **Tools**, **Sign / Unsign**.

2. Choose Appraiser or Supervisor by clicking the radio button in front of your choice.
3. Next, choose a color. You can have your signature print in blue or red (on a color printer) even if it was scanned in black.
4. Click the check box if you'd like to have the current date automatically entered in your report.
5. At the bottom of the dialog box, click the check box to have the Comps from your current report automatically entered into your Comps Database – a real time-saver!
6. Click **OK**.
7. If you configured your system to protect your signature, type the password you assigned, and click **OK**.

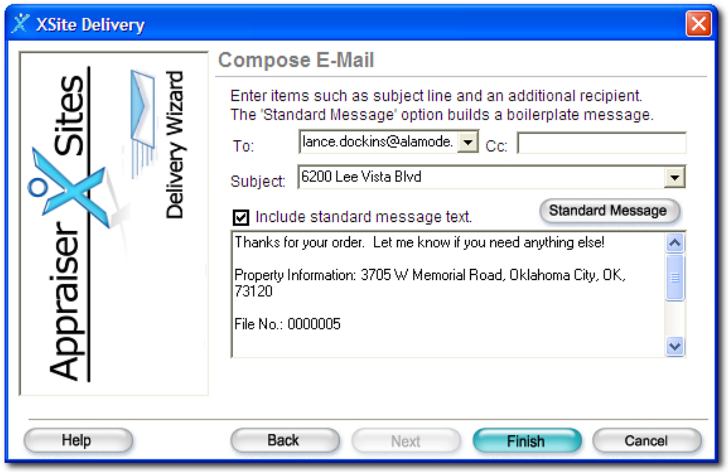
Delivering orders in through your XSite

To deliver a report to a customer through your XSite:

1. With your report open in WinTOTAL, from the menus, choose **Deliver Report**, **Using XSite plugin linked to this report**. Or, if you've configured this as your default delivery method, just click the **Send** button in the menu bar.
2. From the list of plugins, select **XSite Delivery** and click **Next**.
3. 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**.
4. Now you're presented with the XSites Delivery Wizard. Click **Next** to launch the process.
5. Every time you run the Wizard, the first task it performs is checking for the latest plugin updates. This takes only a moment and ensures that you're using the latest improvements to the process. Once the updates are loaded, click **Next**.



6. Next, the Delivery Wizard attempts to match up this report with an order from your XSite. If the original report was created by exporting from your XSite, this should happen automatically. If not, then you're given the chance to select the order manually from a list of open orders. Clicking the **Show all orders** radio button shows older orders as well. Select the desired order in the list and click **Next**.
7. 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 the **E&O Details** button 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.
8. The next dialog box 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 click the **Custom e-mail** check 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**.
9. If you chose to create a custom e-mail message, the next step allows you to create the message. Complete the necessary fields with your client's information. You can automatically fill in most of this information based on the customer information from your report. Click the drop-down menus to see the automated information available for each field.



10. You can also insert text directly into the e-mail message that is sent using information from your report. Click the **Include standard message** text check box, then click the **Edit standard message text** link.

11. Type the standard message you'd like included in the e-mail message that accompanies the SureReceipts link. Then, from the list, click the check mark for the any of the report items you'd also like to insert in the message. Finally, type your "signature block" in the final text 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.

12. Click **Finish** to complete the report and deliver the message to your client.

Delivering reports using Using SureReceipts

While many appraisals today are delivered through e-mail, that's not always the most efficient and secure method. Instead, we've developed a technology called "SureReceipts" that combines the communication power of e-mail with the intelligence and programmability of the Internet.

Instead of sending an e-mail with your report attached, SureReceipts sends an e-mail to your client with a link to the report stored on the XSites Network. When they click on the link to download the report, you're immediately notified, so you know the report made it to your client. As an added advantage, the report remains on the XSites Network for a while, in case your client loses the original report. Instead of you resending the report, your client can simply access the same link to re-download the report.

To deliver a report through SureReceipts:

1. With your report open in WinTOTAL, from the menus, choose **Deliver Report**, **Using WinTOTAL SureReceipts**. Or, if you've configured this as your default delivery method, just click the **Send** button in the menu bar.

2. The **SureReceipts Overview** dialog box appears explaining the advantages of this deliver method. If you'd prefer not to see this screen in the future, click the check box in the lower-left corner and click **Next**.

3. Now, complete the **Delivery Information** screen. You can automatically fill in most of these items based on the customer information from your report. Click the drop-down menus to see the automated information available for each field.

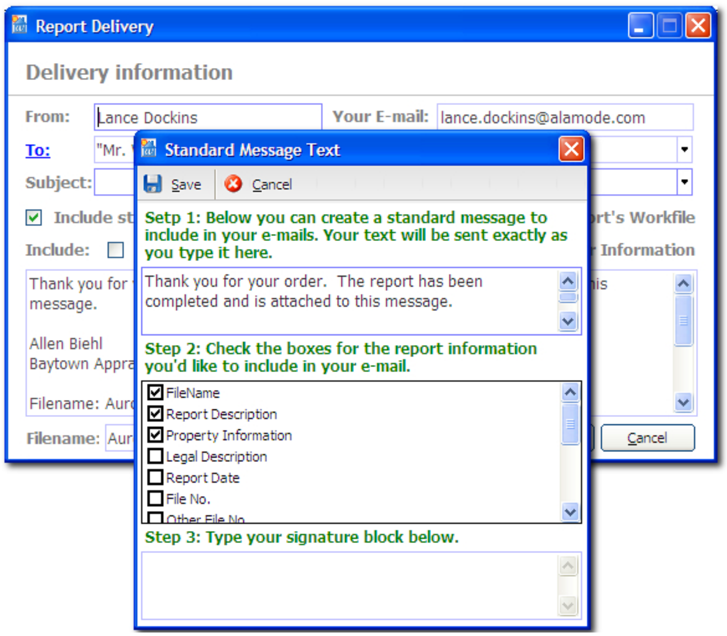
4. For the address fields, you can choose a recipient from your WinTOTAL Contacts database. Click the **To:** link to open the **Select Recipients** dialog box. Double-click the appropriate contact to add that person to your **Message Recipients** dialog box, then click **OK**.

5. You can also insert text directly into the message that your customer sees when they retrieve a report. Click the **Include standard message** text check box, then click the **Edit standard message text** link.

6. Type the standard message you'd like included. Then, from the list, click the check mark for the any of the report items you'd also like to insert in the message. Finally, type your "signature block" in the final text 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.

7. There are two other options to add automated text to your message. Click either the **Acrobat download instructions** or **XSite Order Manager Information** to automatically insert text into your message that explains these useful tools to your customer.

8. If you use WinTOTAL's digital Workfile feature, you can have a copy of the PDF file automatically added to it. This ensures that you always have an exact copy of the report you send to your customers. Click the **Save PDF to report's Workfile** check box to enable this feature.



9. Now, click the **Finish** button and you're presented with the **Aurora Print Engine** dialog box. Select the forms you'd like included in your report — and set any other options necessary — and then click **OK**.

10. Your report is generated and uploaded to the SureReceipts server. Immediately, your customer is sent an e-mail containing a link to the report.

11. When your customer receives the message and clicks the link to retrieve the report, you are sent an e-mail notifying you of the event.

Hint: *When your customers download a report, it doesn't go away. Instead, the report remains on the SureReceipts server for a week. If your customers need to re-access the report during that time, they can simply click the e-mail link again. Each time the report is accessed, you are notified.*

NOTES:

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Delivering orders in through your XSite