Developing Compliant Reports Using TOTAL
Schedule

Welcome! This book contains outlines for the training sessions presented over the course. In developing this material, we took into consideration the most logical sequence in which topics could be learned, and chose the concepts most likely to be used by the majority of appraisers.

**Agenda**

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<thead>
<tr>
<th>Time</th>
<th>Session Title</th>
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<td>10 minutes</td>
<td>Welcome, Course Objectives</td>
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<tr>
<td>35 minutes</td>
<td>Setting up TOTAL</td>
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<td>15 minutes</td>
<td>Customizing the Appraisal Desktop and managing contacts</td>
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<td>20 minutes</td>
<td>Organizing files and folders and using the info pane</td>
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<td>Starting a report</td>
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<td>Working with templates &amp; starting new reports</td>
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<td>Merging data from templates or previously completed reports</td>
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<td>80 minutes</td>
<td>Accurate and compliant formfilling</td>
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<td>Getting around in TOTAL</td>
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<td>Re-using comments with QuickLists and Recent Responses</td>
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<td>UAD-compliant data entry, error checking, and FreeForm shortcuts</td>
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<td>Increasing formfilling efficiency using hotkeys and other tools</td>
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<td>Comp management</td>
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<td>Formatting, editing, sorting, and adjusting UAD comp data</td>
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<td>Improving defensibility in your reports using appraiser-defined adjustment models</td>
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<td>Leveraging the comparables database to increase consistency and save time</td>
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<td>Working with photos and maps</td>
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<td>Importing photos and managing your report images</td>
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<td>Managing maps in your appraisal report</td>
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<td>Rich text editing with TOTAL’s fully-featured word processor</td>
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<td>Linking form fields and controlling text overflow</td>
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<td>USPAP-compliant report delivery and backup</td>
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<td>Checking your report for UAD and USPAP compliance</td>
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<td>Signing your report and building your digital workfile for recordkeeping compliance</td>
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<td>25 minutes</td>
<td>Delivering in a GLB compliant manner and backing up your report</td>
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**Total**

420 minutes  7 hours
Purpose of this class

You’re here because you recognize the importance of “sharpening the axe”. By learning how to effectively leverage all of TOTAL’s features to their fullest, you’ll gain marked improvements in:

- **Accuracy** – Reduce errors by using technology to organize data and eliminate retyping.
- **Compliance** – Ensure compliance with industry and government regulations through understanding TOTAL’s complete feature set.
- **Productivity** – Get more work done by understanding how each feature can be used to its fullest.
- **Consistency** – Leverage tools that help you present your reports in a more consistent manner.
- **Communication** – Whether it’s direct one-to-one communication, or supporting your value, use technology to effectively clarify your point and communicate effectively with your client.
- **Time Savings** – Get your work done faster and more efficiently, allowing you to do more without compromising accuracy, compliance, or communication.

Whether you’re switching from a previous version (WinTOTAL) or coming from a competing formfilling product, overcoming the initial moment of inertia to make the switch and start using TOTAL is critical.

The Chinese philosopher Lao Tzu once said:

“**The journey of a thousand miles begins with a single step.**”

His point was that in order to succeed at anything you do, you must take the initiative to begin the journey. That success comes from action. And understanding how TOTAL works makes that transition simpler and easier.

Our goal with this course is to help you take those first steps in your transition. We’ll cover TOTAL inside and out, pointing out along the way how each feature helps you achieve our goals of writing clear, more accurate reports, in less time, that comply fully with critical regulations, and then communicate those reports to your clients clearly and efficiently.
What is a template?  

Any report in TOTAL can be used as a template. Most appraisers build their own custom templates, but TOTAL also comes with a series of pre-built templates you can use. Either way, templates render many of your redundant report form filling tasks obsolete and are a great way to improve consistency and accuracy throughout your reports.

To create a template, simply build a report with the exact data and forms you want and save it into the File Manager. You could even open one of TOTAL’s built-in templates, modify it to suit your own needs, and then re-save it. Using reports as templates gives you a tremendous amount of control over what data gets saved and what data you bring across into the new report.

Some appraisers find that, rather than working from dedicated template files, it’s more useful to work from completed files in the same neighborhood. Both methods are “correct”, being mostly a personal preference choice. When starting new reports in TOTAL, the process is identical regardless of how you work.

Setting up a new file

In TOTAL, there are many ways to create and complete your reports and you’re free to write each report using the process that works best for you. But, TOTAL has been designed to help you save as much time as possible. By following our recommended process, you could save 15 minutes or more per report.

Each file starts by creating a new report file in TOTAL. There are two places, depending on your settings, from which you can create new reports in TOTAL:

- **The Appraisal Desktop** – For most, this is the default. Click **New** in the Reports panel.

- **TOTAL** – If you’ve set your preferences to open to TOTAL instead, click **New** on the toolbar.

Regardless of where you start, TOTAL always presents you with SmartStart, our rapid report creation process.
If you’re switching from WinTOTAL Aurora, you’re probably familiar with the process of cloning old files as a basis for creating new reports. But there is no “Clone” button in TOTAL to start new reports as there was in prior versions. Instead, SmartStart gives you several new ways to begin your report.

There are four options available on the SmartStart screen to choose from:

- **Forms PowerView** – Immediately start with a blank form of your choice.

- **Table of Contents Screen** – Another option for creating reports from scratch, the Contents screen in TOTAL allows you to add all the appropriate pages for this report up front.

- **Merge Screen** – SmartMerge is the replacement for the cloning process you may be familiar with. SmartMerge builds on that process by allowing you to merge multiple times from multiple reports or templates, and even specify individual forms, pages, or sections to be merged.

- **Assignment PowerView** – Choosing this option starts your new report on the order form. This is very similar to how Aurora works when starting new reports. From here, you can enter client, billing, and tracking details for your assignment.

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*If your report is for an FHA or VA assignment, check the applicable box in this screen and TOTAL will enable the appropriate additional rule set within our Errors & Omissions checker to help ensure that your report is compliant with those additional requirements.*
SmartMerge

To maximize your time savings, we recommend using the Merge Screen option. SmartMerge gives you control like you never had before with simple cloning, which was an all-or-nothing process. SmartMerge is flexible, allowing you to merge all, or only part of, a previous assignment.

In addition, you have the option of merging Forms AND data, or Forms only (great for making a template from an old file). There’s even a “Clone” option for times when you want to merge part of an old assignment into your current report and overwrite the data already present in the affected sections.

When merging, if you don’t know what folder or file you’re looking for, the Advanced find screen allows you to find just the right file to merge from. You can even find potential source files by their proximity to the current subject you’re working on!

Task: Create a new report by merging all the data from an old assignment.

1. From your Appraisal Desktop, click New above your file list.
2. Fill out the Property address and Report Description fields in the SmartStart screen.
3. Choose Merge Screen and click OK.
4. In SmartMerge, choose the options for Entire report and Forms AND data.
5. Select a report from your File Manager folders, or use the Advanced find to locate a file.

6. Click Merge. Your forms and data are merged into your new report.
Sometimes, you'll find that it can be helpful to merge only part of an old assignment into the report you're working on. For example, you’re working on a report that you realize is in the same neighborhood as a property you appraised last week. Merging in the neighborhood section, and potentially some of the comps, could be a great way to save time and ensure consistency in your reports.

SmartMerge lets you do this. In fact, you can use the merge process any number of times during each assignment.

Task: Merge neighborhood details and comps from a previous assignment

1. With a report you’re working on open, click Merge on the toolbar.

2. Choose the options for Selected forms in report and Overwrite all target fields (Clone).

3. Select a report from your File Manager folders, or use the Advanced find to locate a file.

4. Check the box next to the forms, sections, or comparables you wish to merge.

5. Click Merge. Your forms and data are merged into your new report.
Importing comp data

Most appraisers have access to one or more MLS systems from which they can pull data. And historically, that meant printing and transcribing property records into the comp grid by hand. But that process is laborious and error-prone. Instead, TOTAL can help you import that data automatically into the comp grid in a fast and consistent manner. Every time you want to re-use data from your MLS, you’ll be able to use the same import template, or map file, over and over.

When you’re conducting your search for comps in your MLS system, remember that the results are going to be imported into a single report, not directly into the comp’s database. So you’ll want to filter and narrow your results until you have a reasonable number of “working” comps for your assignment. (You’ll have an opportunity later to save those comps to the database for re-use if you desire.)

Most modern MLS systems offer an option to export their property data in a common database-compatible format. When using Import from MLS Text File, TOTAL supports both comma separated value (*.csv) files and text (*.txt) files.

If you need help creating or downloading your comps into a supported file format, you’ll need to contact your MLS system’s support team. Many different MLS systems use different steps, and they’ll be the most familiar with the process.

While MLS systems are the most common data source used for importing property information into a report, if your county records or other data source can export property details in a supported file format, this process will work for those sources as well.

Once you have your comps downloaded in a file saved to your hard drive, you’re ready to import those properties into your report. The first time that you walk through this process, you’ll need to do some configuration and “mapping” of your data to indicate to TOTAL which of your source fields should be imported into which of TOTAL’s comp grid fields. In the future, you’ll be able to simply re-use the mapping you created previously and the process is very quick.
Importing Comps from your MLS (cont.)

Task: Import properties from an MLS text file

1. From the Side-by-Side PowerView, click the **MLS Text File** button on the toolbar.

2. Choose a previously created template from the Select existing template drop-down, or click **Add** to create a new one.

3. Next, click **Browse** to select your source file you downloaded earlier from your MLS. Once you’ve located and selected your source file, click **Open**.

4. Verify that your source data displays correctly in the preview at the bottom of the screen, adjusting the delimiter if necessary. Then, click **Next** to configure field mapping.
5. In step 2 of the MLS Text File Importer, map fields from your source file to the appropriate destination fields within TOTAL using the form grid displayed on the right. Select a source field under the Source Fields pane, then select the appropriate field under Destination Form Fields on the right and click Match.

Note that you can select multiple source fields and map them to a single destination field, or multiple destination fields with a single source field. The appropriate advanced screens will be displayed when you click Match. (This is covered in detail in our course Controlling your data with TOTAL)
Task: Import properties from an MLS text file (cont.)

6. Click **Next** to proceed.

7. On step 3, select how you want to import each property:
   - The default is to import properties as a **Sale** into the first empty comparable grid in your report. TOTAL adds additional comp pages to your report as needed.
   - Select **Rental** to import the property to the next available rental slot in your report.
   - Select **Listing** to import the property to the next available listing slot in your report.
   - Select **Do Not Import** if you decide you don’t want to import a specific property.
   - If you want to import all the addresses as a particular type of property, use the **Apply to All** drop-down and select the appropriate property type.

8. Once you’ve selected the pages to which you would like to assign the properties, click **Finish** to complete the import process and add the properties to your report.

**Remember, properties are added to the first available (empty) slot in your grid, in the order they appear in your source file.**