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

<table>
<thead>
<tr>
<th>Time</th>
<th>Session Title</th>
<th>Page</th>
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</thead>
<tbody>
<tr>
<td>10 minutes</td>
<td>Welcome, Course objectives</td>
<td>1</td>
</tr>
<tr>
<td>20 minutes</td>
<td>What is mobility?</td>
<td></td>
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<tr>
<td>40 minutes</td>
<td>USPAP-compliant paperless office techniques</td>
<td>3</td>
</tr>
<tr>
<td>10 minutes</td>
<td>Why paperless?</td>
<td></td>
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<tr>
<td>30 minutes</td>
<td>Four steps to a paperless office</td>
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<tr>
<td>10 minutes</td>
<td>-- BREAK</td>
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<tr>
<td>50 minutes</td>
<td>Prepping a report for your inspection</td>
<td>9</td>
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<tr>
<td>10 minutes</td>
<td>Setting up your field report</td>
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<tr>
<td>30 minutes</td>
<td>Building good QuickLists</td>
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<tr>
<td>10 minutes</td>
<td>Gathering report-specific data ahead of your inspection</td>
<td></td>
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<tr>
<td>50 minutes</td>
<td>TOTAL for Mobile tips for gathering data</td>
<td>21</td>
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<tr>
<td>30 minutes</td>
<td>Using your mobile device to inspect a property</td>
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<tr>
<td>10 minutes</td>
<td>Taking and managing mobile photos and pages</td>
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<tr>
<td>10 minutes</td>
<td>Synchronizing data between your mobile device and PC</td>
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<tr>
<td>90 minutes</td>
<td>Other apps for appraisers</td>
<td>31</td>
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<tr>
<td>20 minutes</td>
<td>Mobilizing your traditional phone and fax lines with apps</td>
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<tr>
<td>70 minutes</td>
<td>Using apps to solve day-to-day appraisal problems</td>
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<tr>
<td>10 minutes</td>
<td>-- BREAK</td>
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<tr>
<td>80 minutes</td>
<td>Field sketching 101</td>
<td>43 (Tablets)</td>
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<tr>
<td>40 minutes</td>
<td>Line drawing, angle measurement and entry, and cutting out the garage</td>
<td>57 (Phablets)</td>
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<tr>
<td>30 minutes</td>
<td>Drawing curves, placing symbols, page management</td>
<td>71 (Phones)</td>
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<tr>
<td>20 minutes</td>
<td>Copying areas</td>
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<tr>
<td>10 minutes</td>
<td>-- BREAK</td>
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<tr>
<td>20 minutes</td>
<td>Field sketching 101 (Cont.)</td>
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<tr>
<td>10 minutes</td>
<td>Re-opening and adjusting existing areas, using open-to-below areas</td>
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<tr>
<td>5 minutes</td>
<td>Drawing interior walls, room labels</td>
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<tr>
<td>5 minutes</td>
<td>Gathering room-specific data</td>
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<tr>
<td>30 minutes</td>
<td>Solving measuring problems using a DISTO™</td>
<td>85</td>
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<tr>
<td>10 minutes</td>
<td>Understanding DISTO basics</td>
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<tr>
<td>20 minutes</td>
<td>Using advanced DISTO measurement techniques</td>
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<td>Total</td>
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<tr>
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Why mobile appraising?

Mobile appraising is all about improving in three key areas:

- **Accuracy** – Reduce errors by using technology to organize data and eliminate retyping.
- **Communication** – Communicate more effectively with your clients.
- **Time Savings** – Get your work done faster and more efficiently, allowing you to do more.

You save time out of the office by gathering your data faster, communicating better with your clients by having access to your workfile data wherever you are, and maximizing your productivity while in the field. When you’re back in the office, you save time and improve accuracy and consistency by not having to recreate or redo work – this improved accuracy is something from which your clients benefit. This could be something as simple as using QuickLists in the field, or originating property sketchs electronically while on your inspection. And you’ll want to keep an eye on how mobile technology affects your compliance (USPAP, GLB, UAD, UMDP, etc.) as you introduce more and more aspects of mobility into your workflow.

The purpose of this class

“When are we going to stop doing what works, in order to do what works better?”

Over the years we’ve gone from rub-ons to satellite imagery, Polaroids to megapixels, and dot-matrix to PDF. The game keeps changing, and you need to change along with it to stay competitive and compliant.

Mobile technology is as disruptive to the appraisal industry as digital photography, formfilling software, and laser printers were. One day, you’ll look back to a time when you were using clipboards and tape measures and wonder how you did business that way. In this course, we’ll identify many common hurdles to successfully adopting a compliant mobile workflow, and present practical solutions for each of them.

It’s not just about buying a laptop, or having all the newest tools and gadgets. You have to be committed to change the way you think about your day, and you have to know how to leverage each tool properly in your workflow to maximize your productivity. Going mobile may seem daunting at first, so it helps to ease into it with baby steps over time. You’ll see dramatic time savings from even minor injections of mobile technology and improved workflow in your process.

Our goal with this seminar is to share some pointers about mobile technology, and get you energized to make some meaningful, progressive changes to your own workflow. We don’t expect every app or feature we discuss to be helpful to everyone; you’ll find some suggestions helpful, while others might not really be applicable to your particular workflow. So as we go, take notes on which features you think you’ll find helpful in your own office.
Taking credit card payments from non-lenders

If you do non-lender work, you may want to consider taking payment from your homeowners while you’re on inspection. For this, you have a couple of useful options:

- You can use the mobile tools on your Enterprise XSite to take payment. This requires the order to be online, and a merchant account configured on your XSite. But this works with basically any web browser, including the one on your mobile device, and it’s included as part of your Elite package.

- Use Square. (https://www.squareup.com/) You get a card reader that plugs into your iPad and runs transactions immediately. The homeowner signs for it with their finger, and they can even get an automatic receipt. On top of the mobility aspect, Square doesn’t require a merchant contract, and is generally much cheaper than having a card swiping device at the office.

Accessing WiFi in the field

To have consistent access to your workfile and data, you don’t have to have a mobile device that’s constantly connected to the cell towers, which would cut down on your mobility costs. These days, in most cities, you’re rarely very far from a Starbucks, McDonalds, IHOP, etc., where you can have access to free WiFi. You can do your inspections at a property, then stop by a Starbucks parking lot on your way to your next inspection to do any Internet syncing that needs to be done. If you need help finding free WiFi spots, we recommend WiFi Finder by JiWire, Inc, available for iOS and Android.

- Android: http://alashort.com/1f2MLaU
- iOS: http://alashort.com/1g7sakx

Providing your own WiFi

If you’re using a WiFi only device, you have to provide a connection for it. The first method for doing this is via the "personal hotspot" feature on your smartphone.

Your phone’s “Personal Hotspot” feature

Sometimes referred to as “tethering” (though this is technically no longer true because almost all devices do this via WiFi now), you use your smartphone’s connection to the cellular network and then re-broadcasting that over WiFi channels for your WiFi mobile device(s) to use. Most carriers charge a premium for this capability. Check with your carrier for specific details about your plan.
Pros

- You don't have to carry a separate dedicated hotspot device around.
- Good for short bursts of connectivity.
- Depending on your carrier, can sometimes piggyback with your current data plan.
- Often requires a surcharge or separate plan fee to use and enable on your phone, rather than a separate contract and line on your account.
- You always have an Internet connection with you, provided you have cellular coverage.

Cons

- Many phones get hot when used as a personal hotspot.
- Shortened battery life on your phone means less talk-time and you have to charge more often.
- Some providers and/or devices don’t support simultaneous data & voice usage.
- Some devices only support a single data connection at a time.

Dedicated hotspot devices

The other alternative for remote connectivity comes in the form of dedicated hotspot devices. These are devices that you buy from your carrier that have their own battery and only connect to the cellular data network in order to rebroadcast it over standard WiFi channels, which you can then use to connect your WiFi only devices like tablets and laptops to the Internet.

Pros

- Better battery.
- Longer life.
- Can carry an extra.
- Doesn’t run down your phone’s talk time.
- Multiple device connectivity.

Cons

- Separate device and plan cost.
Creating the sample sketch – TOTAL for Mobile on a tablet

These step-by-step instructions help you keep up with the instructor during the field sketching session. You can always refer back to these steps if you fall behind or lose track of where you are in the drawing.

Here’s what the completed sketch will look like for reference as we get started.

Basics
First, a few key interface mechanisms you should know.

- Pinch and squeeze to zoom in or out.
- Two fingers on screen moved in unison with each other pans the drawing.
- Tapping **enter** toggles drawing mode vs. place cursor mode.
- Tapping the **fit** button auto-fits the drawing to the screen.
- You can input a line direction using the on-screen arrows, or by swiping that direction on-screen.
- If your drawing action causes an unexpected result, tap the **Undo** button to go back one step.

Button legend
You’ll use these buttons often:

- **Area walls**
- **Modify**
- **Pages**
- **Labels**
- **Freeform text**
- **Free-form walls**
- **Place cursor**
- **Symbols**
- **Calculations**
To begin
Straight lines are entered in much the same manner as your traditional desktop skether. Enter a dimension and tap the appropriate directional arrow on the keyboard.

1. When the sketch view opens, you’re immediately ready to begin sketching. Just enter your first dimension and tap a directional arrow.
2. Enter 20, tap right, tap enter to lock in place.
3. Enter 15, tap down, tap enter to lock in place.
4. Enter 16, tap right, tap enter to lock in place.
5. Enter 5, tap up, tap enter to lock in place.
6. Enter 25, tap right, tap enter to lock in place.
7. Enter 35, tap down, tap enter to lock in place.
8. Tap the fit button to zoom out and see your sketch.

For the bay window
Bay windows use rise and run and introduces a process that allows you to adjust lines before placing them by entering multiple measurements and/or directions.

9. Enter 3, tap right, do NOT tap enter to lock.
10. Enter 4, tap down, tap enter to lock in place.

The line should be angled.

11. Enter 10, tap down, tap enter to lock in place.
12. Zoom in by pinching out on screen.
13. Pan until your bay window is back in view by placing two fingers on screen and moving in tandem.
14. Tap the blue pop-point to finish the bay window.

Alternatively, enter 3 and tap left, then 4 and tap down, then lock your line.

15. Enter 10, tap down, tap enter to lock in place.
16. Enter 20, tap left, tap enter to lock in place.
17. Enter 15, tap up, tap enter to lock in place.
For the custom angle
Custom angles with long walls require that you measure the length and angle of the wall (using an angle measurement tool) while you’re on site. Then, use this information to enter the line in your sketcher.

18. Enter **20**, do NOT tap any direction.

19. Tap **angle** to bring up the angle tool.
20. Enter **53** as the angle of deflection.
21. Tap the **left pointing arrow** (the orange side) on the angle tool to make the line deflect left and anchor the line in place automatically.

Continue drawing
Pop points (the red dots you see as you draw) allow you to extend or create lines in your drawing by simply tapping on them. They’re useful for squaring sketches automatically in the field.

22. Enter **40**, tap left, tap **enter** to lock in place.
23. After tapping **fit**, tap the **pop-point** above where your cursor is, in-line with the 16ft wall (your 3rd line drawn). The line pops into place.
24. Tap the **pop-point immediately to the right of** where your cursor is, in-line with your original starting point.
25. Tap your **initial point of beginning** to close the first area.
26. Verify that **First Floor** is indicated, then tap **OK** to complete your first area.
Cutting out the garage

Your initial sketch of the property footprint includes the garage. This affects your overall square footage and needs to be adjusted accordingly. Once you’ve been inside the property and know the interior measurements, you can use this information to “cut out” the garage area from the living space.

This is accomplished using area lines to draw the common (or shared) walls. Once you’ve done that, TOTAL for Mobile automatically creates two separate areas, each with their own properties and calculations.

27. Verify you are in **Place cursor** mode.
28. Tap the **corner in the upper-left** of your drawing where two 15ft lines meet.
29. Tap **enter** to toggle drawing mode on. Verify you are drawing **Area** walls.
30. Enter 5, tap down, tap **enter** to lock in place.
31. Use the **pop point to the right** of your cursor, then the pop point where it meets the outside wall to complete the garage cutout.
32. Verify that the appropriate garage type is selected. In this case, it should be **2 Car Attached**, then tap **OK** to complete your garage. The Sq. Footage should be cut-out of your living area automatically.

You’ll use the same method later to handle open-to-below areas such as stairwells, atriums, etc...