



QL2 Tutorial

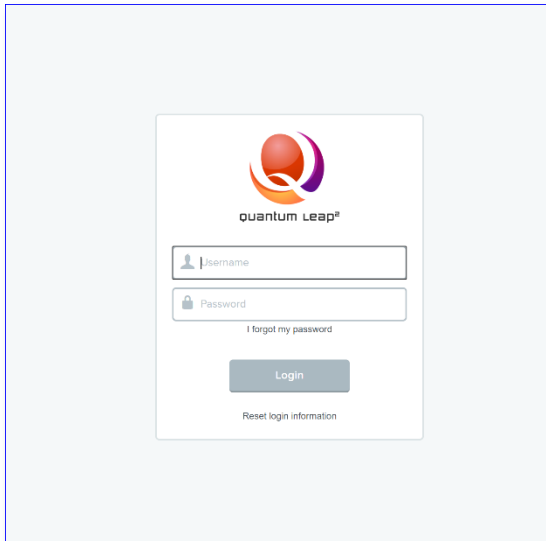
Creating an Appraisal

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Logging into QL2

Using your ID and Password – Open QL2

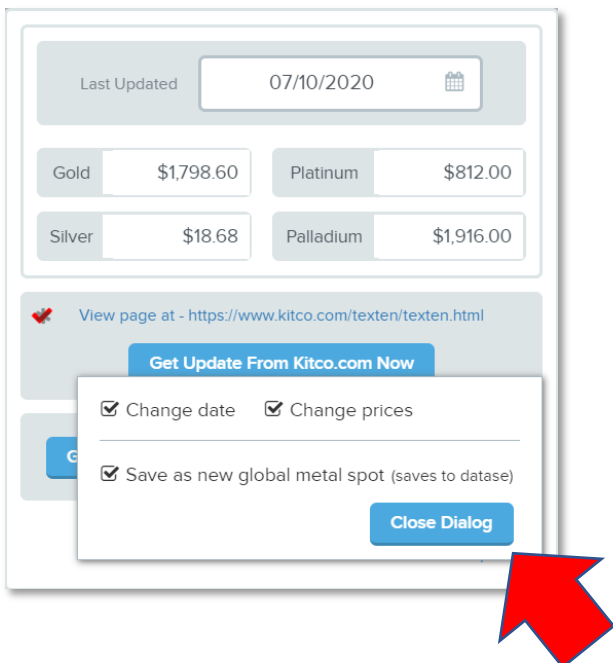


The image shows a login form for Quantum Leap. At the top is the Quantum Leap logo, which consists of a stylized 'Q' in orange and purple. Below the logo is the text 'quantum Leap®'. The form contains two input fields: 'Username' and 'Password'. Below the password field is a link that says 'I forgot my password'. A 'Login' button is positioned below these fields. At the bottom of the form, there is a link that says 'Reset login information'.

Metal Spot

The “Update Metal Spot“ popup will open and download current metal prices from Kitco.

Click on “Close Dialogue” to proceed.



The image shows a dialog box for updating metal spot prices. At the top, it displays 'Last Updated' as '07/10/2020' with a calendar icon. Below this are four price boxes: Gold at \$1,798.60, Platinum at \$812.00, Silver at \$18.68, and Palladium at \$1,916.00. A link at the bottom left says 'View page at - <https://www.kitco.com/texten/texten.html>'. A blue button labeled 'Get Update From Kitco.com Now' is present. A smaller dialog box is overlaid on top, containing three checked options: 'Change date', 'Change prices', and 'Save as new global metal spot (saves to datase)'. A blue button labeled 'Close Dialog' is at the bottom right of this smaller dialog. A large red arrow points to the 'Close Dialog' button.

| Metal | Price |
|-----------|------------|
| Gold | \$1,798.60 |
| Platinum | \$812.00 |
| Silver | \$18.68 |
| Palladium | \$1,916.00 |

Worksheet Folder

QL2 opens to the "Worksheet" Folder page....this is where you will start a **New** worksheet or open an **Existing** worksheet.

| No. / ID / Location | Created / Modified | Name / Address | Intended Use / Category | Groups | Status | Total Value | Edit / Delete |
|--|------------------------|---|-----------------------------------|----------|---------|-------------|----------------|
| 10149 Appraiser's Office | 6/28/2020 6/28/2020 | Test, Mr. Zippy 1880 Oak St., San Diego, CA 92108 | Insurance Appraisal Insurance | 0 Groups | 0 Items | \$0.00 | Edit Delete |
| 10140 Appraiser's Office | 6/23/2020 6/25/2020 | Thom, Sir Wonderful & Wonderful, Ms. Mary 3308 Somewhere, Anytown, CA 92105 | Insurance Appraisal Insurance | 0 Groups | 2 Items | \$23,700.00 | Edit Delete |
| 10139 Appraiser's Office | 6/23/2020 6/23/2020 | Adams, Mr. John Quincy & Adams, Mrs. Louisa 1600 Pennsylvania Avenue, Washington, DC 20500 | Insurance Appraisal Insurance | 0 Groups | 0 Items | \$0.00 | Edit Delete |
| 10137 Appraiser's Office | 6/22/2020 6/22/2020 | Smithers, Mr. Thom 123 Oak St., San Diego, CA 12345 | Insurance Appraisal Insurance | 0 Groups | 1 Item | \$4,000.00 | Edit Delete |
| 10134 Appraiser's Office | 5/13/2020 6/19/2020 | Schwartz, Mr. Robert 123 Oak St., San Diego, California 92110, United States | Estate Appraisal Estate/ Trust | 0 Groups | 1 Item | \$15,400.00 | Edit Delete |
| 10124 Appraiser's Office | 4/14/2020 6/6/2020 | Schwartz, Mr. Robert 123 Oak St., San Diego, California 92110, United States | Insurance Appraisal Insurance | 1 Group | 2 Items | \$12,006.00 | Edit Delete |
| 10121 234wert Appraiser's Office | 3/27/2020 5/4/2020 | Schwartz, Mr. Robert 123 Oak St., San Diego, California 92110, United States | Insurance Appraisal Insurance | 1 Group | 1 Item | \$16,985.00 | Edit Delete |
| 10119 Appraiser's Office | 3/25/2020 3/29/2020 | Adams, Mr. John Quincy & Adams, Mrs. Louisa 1600 Pennsylvania Avenue, Washington, DC 20500 | Insurance Appraisal Insurance | 0 Groups | 3 Items | \$34,400.00 | Edit Delete |

Existing Worksheet

A previously created worksheet/appraisal can be found using the "Search" box (upper right) and once found opened by clicking on Edit.

New Worksheet

Click on the "New Worksheet" button to start a new appraisal. "Select Client" will popup/open.

| Business / Last / First | Street / Village | Action |
|-------------------------|-------------------------------------|--------|
| Test Zippy | 1880 Oak St. San Diego, CA 92108 | Select |
| Test Roger | 123 Oak St. Escondido, CA 12345 | Select |
| Test Roger | 123 Oak St. San Diego, CA 92105 | Select |

Type the client's last name in the "Select Client" field. Existing names that match will appear in the list below. Select an existing client or if new click on the **New Client** button.

*Note: selecting an **existing** client will take you directly to the Worksheet page.*

New Client Window

Fill in the client information. Fields (e.g. Full Name, Address, etc.) may have a popup window for details.

Client Information

Client Name

Close

Save Client Help

Private party Business Receives copy of report

Business Name

Full name

Test, Mr. Zippy

Address

1880 Oak St.
San Diego, CA 92108

Phone numbers

Mobile - (619) 444-5555

Email

qzippy@gmail.com

Referred by

Currie & Co.

Title

Mr.

First Name

Zippy

Middle Name

Last Name

Test

Suffix

Options...

Estate/Trust Information

Third Parties

Insurance Policies

Litigation

When you have completed adding the client information, click on the “Save Client” button then go to your browser and close the Client tab (above) to proceed to the Worksheet page.

New Worksheet

Your New Worksheet page will look like this. The Worksheet fields in the upper section will auto-fill but can be edited. Click on the “Add New Item” button to proceed.

Worksheet 10149

Message Groups

Client Name

Test, Mr. Zippy

Worksheet Template

Insurance - Insurance Appraisal

Total \$0.00

Save Worksheet Help

Existing Reports New Report

Create Update OR Add New Item

Custom Fields

Worksheet ID

Appraisal Category

Insurance

Intended Use

Insurance Appraisal

Dates

Creation 07/12/2020 Inspection (Evaluation) 07/12/2020

Inspection Location

Appraiser's Office

Value Description

Fair Market Value

Market Level

primary retail, brick and mortar, single-store

Delivery 07/12/2020 Valuation (Effective) 07/12/2020

Summary Message

Personalized Message

Created By

Attachments

0 Items

New Item

Copy Item...

Export Item Data

Item Total \$0.00

Weight

gms

Inspection Date

07/12/2020

Item ID

Summary Description

Select / Enter description

Item Template

Select Item Template

Item Description

Alternate Descriptions

Item Notes

Item Commentary

Notes Attachments

0 Components

Adding an Item

Scrolling down New Worksheet page , the Item section is for describing the item(s) and provides opportunity for adding photos, weight, summary description, a narrative and more.

1 Item Copy items... Export Item Data

New Item Item Total \$8,000.00

Item 1 \$8,000.00

1 Image Weight 3.45 gms Inspection Date 06/30/2020 Item ID

Summary Description Engagement Ring Item Template Select Item Template

Item Description One lady's engagement ring with an offset shank set with one (1) round diamond and accented with nine (9) smaller round diamonds.

Alternate Descriptions

Item Notes Item Commentary Notes Attachments

3 Components

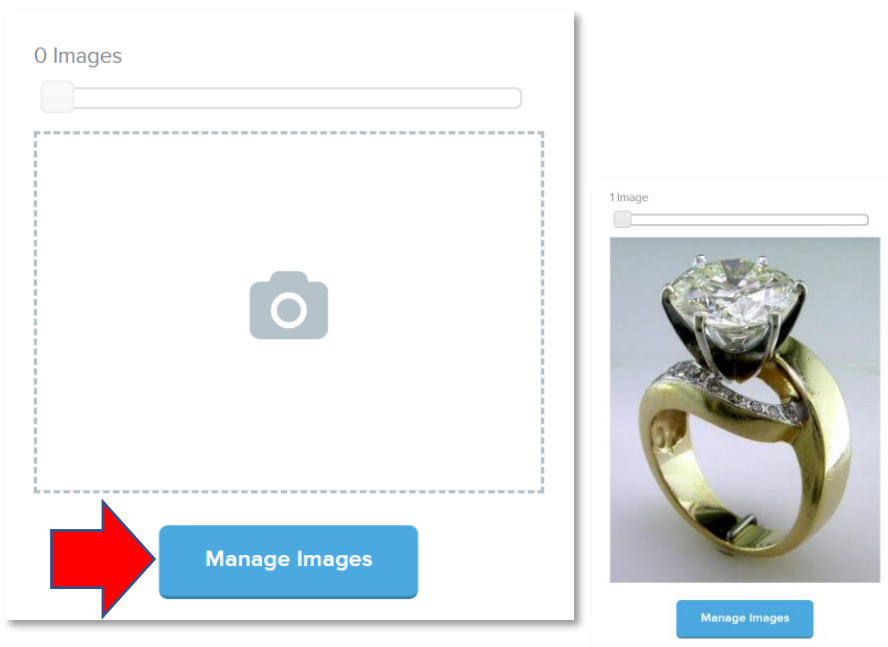
- Mounting
- Diamond
- Diamond Melee
- Add Component

Valuation

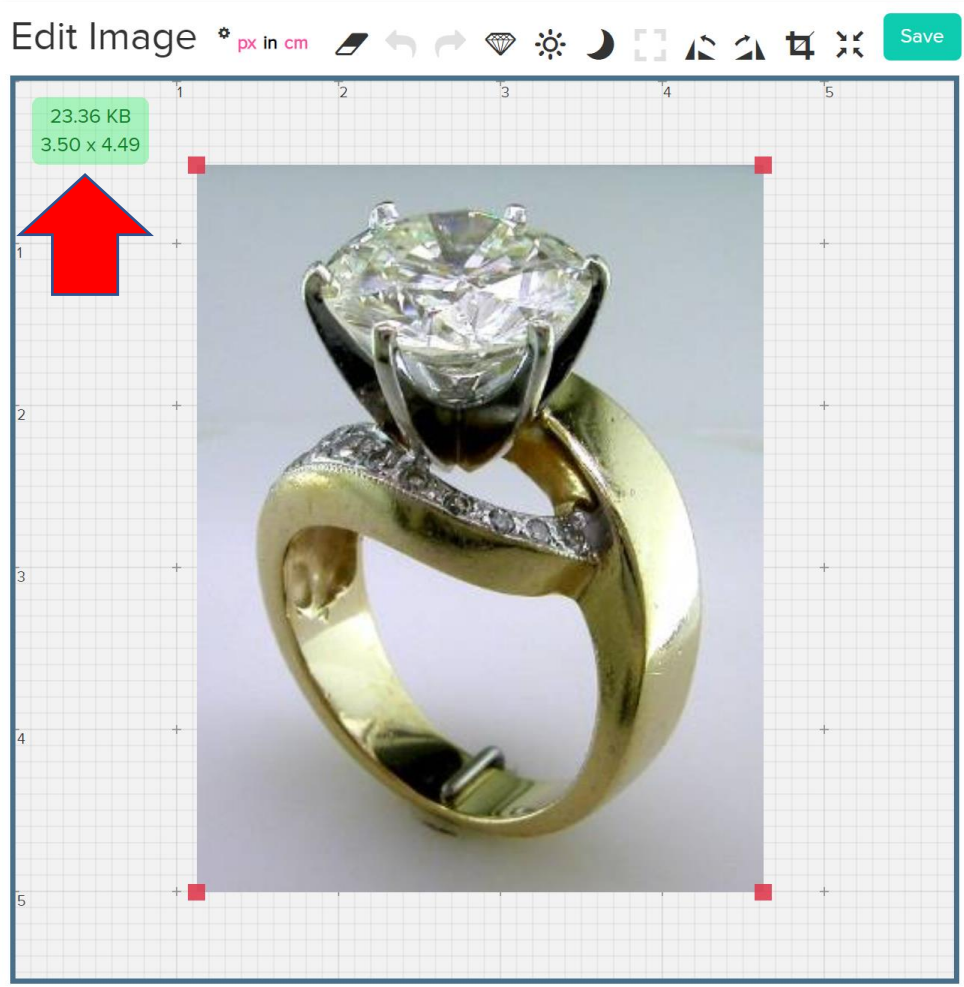
Gem Cost

Adding Photo(s)

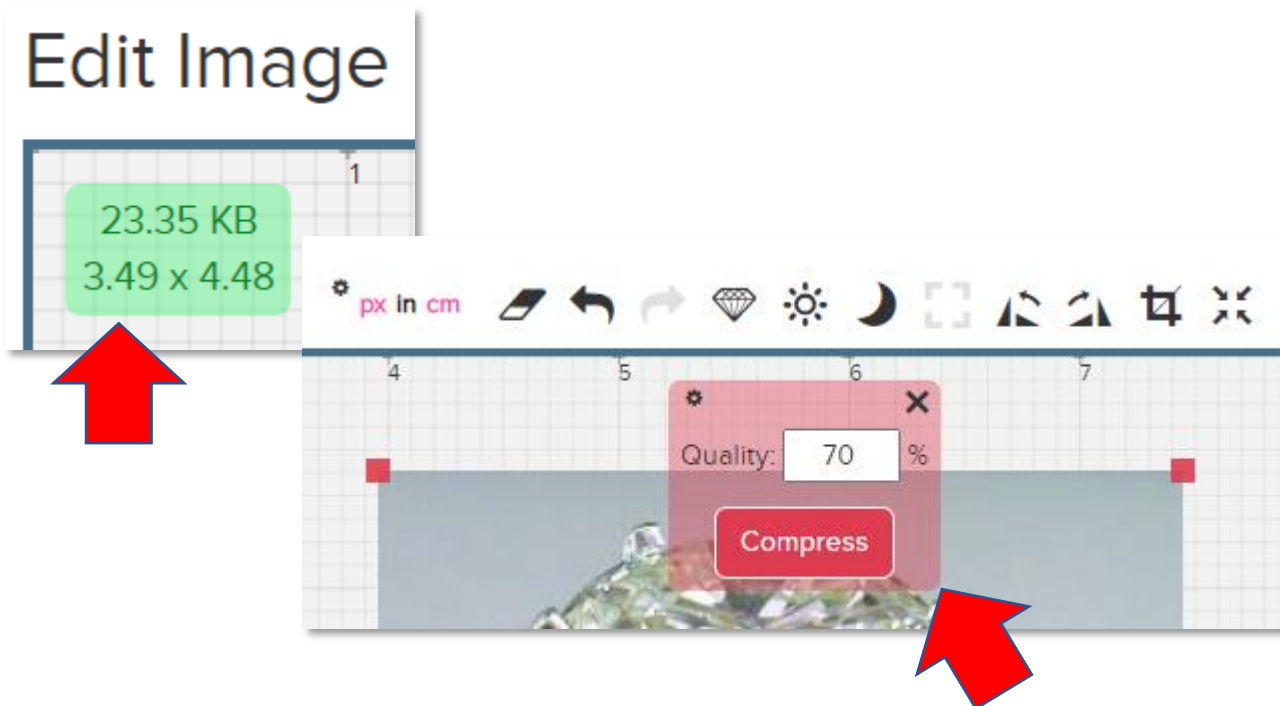
Click on the “Manage Images” button, then browse for the photo file or better yet drag and drop your photos onto the Manage Images box (as many as you want but jpg only).



Photos should be captured/edited to a reasonably small photo size but if not QL2 has basic photo editing tools to help. Click on the “Edit” button to open the Photo Edit popup.



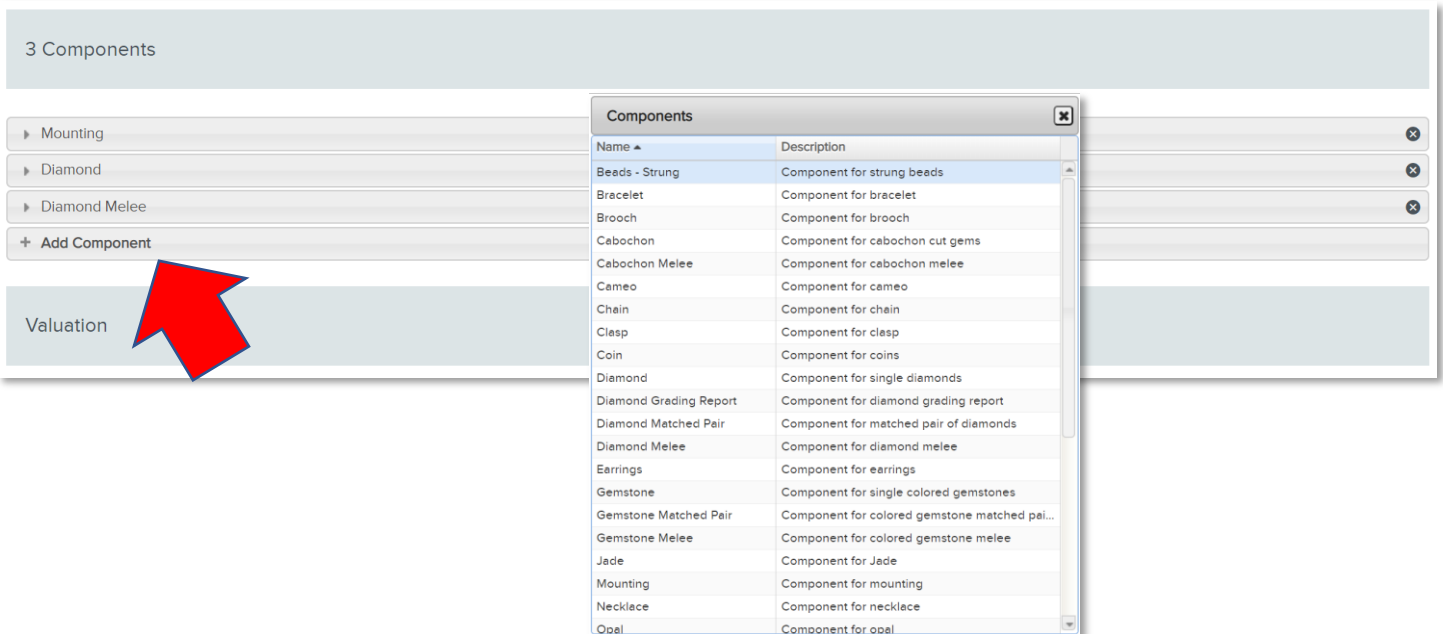
Edit Image includes tools to size, sharpen, brighten, darken, rotate, crop, and compress your image. Of these, most important are **sizing** and **compressing**.



Start by entering a width measurement for your image as it would print in the finished appraisal (e.g. 3.5 inches) and press enter. The height will automatically reduce to scale. From left to right (e.g. sharpen, etc.) edit the image as desired. Finish by clicking on compress. 70% seems to work well but you can experiment. The goal is to get the image size under 100 KB wherein the Measurements box will turn green.

Components

Add a component by clicking on the “Add Component” bar then choosing from the popup.



Component Details

The chosen component will open. You close and reopen a component by clicking on the relevant component bar.

Functionality of Details will differ depending on expected data... some require a measurement, some are automatically calculated, some have dropdown picklists, some will open a popup window (e.g. melee calculator, plotting, etc.).

3 Components


▶ Mounting

▼ Diamond

| Detail Name | Value | | | Help |
|-----------------------------|-----------------|---|---|------|
| Shape and cut | Round brilliant | ▼ | ↻ | 📄 |
| Length (mm) | 6.62 | | ↻ | |
| Width (mm) | 6.62 | | ↻ | |
| Depth (mm) | 4.40 | | ↻ | |
| Meas. are... | (approximate) | ▼ | ↻ | 📄 |
| Weight adjust | 7% - Thick | ▼ | ↻ | 📄 ? |
| Weight (ct) | 1.26 | | ↻ | |
| Weight is... | (calculated) | ▼ | ↻ | 📄 |
| Clarity | SI1 | ▼ | ↻ | 📄 |
| Color | K | ▼ | ↻ | 📄 |
| Cut | Good | ▼ | ↻ | 📄 |
| Finish | Good | ▼ | ↻ | 📄 |
| Fluorescence (lw) | None | ▼ | ↻ | 📄 |
| Lab Report name/number/date | GIA 12345 | | ↻ | |
| Supporting Documents | 0 Images | ▼ | | |
| Comments | | | ↻ | |
| Plot | | ▼ | | |
| Additional Diamond Inserts | | ▼ | | |

▶ Diamond Melee

+ Add Component



Add additional components as needed by clicking on “Add Component”.

Valuation

Valuation is accomplished at the bottom-section of the Item page. All relevant value characteristics are presented.

If the value you assign is known (e.g. market comparison approach to value) scroll to the bottom of the Valuation section and enter it in the "Total field". Tax can be applied if desired.

If you want assistance calculating the value (e.g. cost approach to value) you can enter data in the relevant fields (e.g. \$/ct., adjustment, markup to retail, etc.). The value will be reflected in the Total field as you proceed.

Valuation

Gem Cost

| Description | Weight | Units | \$/Unit | +/- % | Markup % | Unit Total |
|--|--------|-------|----------|-------|----------|------------|
| Diamond Round brilliant SI1 K | 1.26 | ct | 3,000.00 | -15% | 50% | 4,800.00 |
| Diamond melee Round full cut SI H-I 9@ 0.052 | 0.47 | ct | 850.00 | 0% | 0% | 400.00 |

Total Diamond Weight

Individually Marked-Up Gems Total

Mounting Costs

| Net Weight (gms) | \$/ gram | Total |
|------------------|----------|--------|
| 3.10 | 83.41 | 260.00 |

Additional Costs

| Add Cost | Cost |
|---|-------|
| <input checked="" type="checkbox"/> Setting | 95.00 |

Mark up + =

Value Description

Replacement Value (NEW) + =

Total

Taxes

Item Total

Additionally, QL2 interfaces with pricing guides The Guide, Gem ePrice, and Rapaport (you must be a subscriber to these) and can retrieve current pricing from those sources by clicking on the small dollar symbol in the \$/Unit field.

The Guide

The Guide Pricing

Shape

Clarity

Color

Weight (ct)

Get Prices

[Open GemGuide site](#)

Round - K - SI1 - 1.26 ct. (USD)

| COLOR | VS2 | SI1 | SI2 |
|-------|------|------|------|
| J | 4000 | 3800 | 3525 |
| K | 3510 | 3370 | 3120 |
| L | 3400 | 3000 | 2710 |

Rapaport

Rapaport Diamond Pricing

(1.00 - 1.49)
 Last Updated: 2/21/2020

| | IF | VVS1 | VVS2 | VS1 | VS2 | SI1 | SI2 | SI3 | I1 | I2 | I3 |
|---|--------|--------|--------|--------|--------|-------|-------|-------|-------|-------|-------|
| D | 18,000 | 15,500 | 13,600 | 11,900 | 10,500 | 8,600 | 7,000 | 5,800 | 4,700 | 2,700 | 1,700 |
| E | 14,500 | 13,400 | 11,700 | 10,800 | 9,600 | 8,200 | 6,700 | 5,600 | 4,500 | 2,600 | 1,600 |
| F | 12,700 | 12,000 | 10,700 | 10,200 | 9,000 | 7,900 | 6,400 | 5,400 | 4,400 | 2,500 | 1,500 |
| G | 10,700 | 10,200 | 9,500 | 9,000 | 8,300 | 7,400 | 6,000 | 5,200 | 4,200 | 2,400 | 1,400 |
| H | 9,000 | 8,500 | 8,200 | 8,000 | 7,600 | 6,800 | 5,700 | 4,900 | 4,000 | 2,300 | 1,400 |
| I | 7,600 | 7,200 | 7,000 | 6,800 | 6,600 | 6,200 | 5,300 | 4,600 | 3,600 | 2,200 | 1,300 |
| J | 6,300 | 6,100 | 6,000 | 5,900 | 5,700 | 5,300 | 4,800 | 4,200 | 3,300 | 2,000 | 1,300 |
| K | 5,300 | 5,100 | 4,900 | 4,700 | 4,500 | 4,300 | 3,900 | 3,600 | 3,100 | 1,800 | 1,200 |
| L | 4,800 | 4,600 | 4,500 | 4,300 | 4,100 | 3,800 | 3,500 | 3,300 | 2,900 | 1,700 | 1,100 |
| M | 4,300 | 4,100 | 3,900 | 3,800 | 3,600 | 3,400 | 3,000 | 2,800 | 2,600 | 1,600 | 1,100 |

<
>

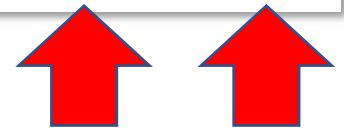
Approach to Value and Market Levels

Use of the Approach to Value and Market Levels section at the bottom of the Item page is optional. Its purpose is to state the valuation basis, data source, market level and trend for the item being appraised and assist the appraiser in abiding by USPAP.

Approach to Value / Market Levels

| | |
|---|--|
| Valuation Basis | Approach to Value |
| a comparable new item | cost |
| Valuation Data Source | Market Level |
| anticipated wholesale costs of materials and labor to which was applied the modal m | primary retail, brick and mortar, single-store |
| Market Trend | |
| generally stable | |

[Generate Report](#) [New Item](#)







Additional Items

To add additional items to the worksheet/appraisal click on the New Item button.

As items accumulate you will see them listed in the left margin of the Worksheet. To move from one to the other click on the item you want opened. They can also be reordered (the order they will print in the created report) using click and drag.

3 Items

[New Item](#) Copy items... Item 3

| | |
|--|---|
|  Item 1 Engagement Ring \$7,757.00 |  |
|  Item 2 New Item \$975.00 | |
|  Item 3 New Item \$1,500.00 | |

1 Image

Generate a Report/Appraisal

Once done entering data for your item(s) click on the Generate Report button at the bottom of the page or scroll to the top and click on the New Report tab and click on the Create Report button.

The report will appear first onscreen in edit mode. This is the best mode for reviewing the report prior to printing.

To view the in document as it will print click on Actions in the menu, then Document View.



Prepared For: Mr. Zippy Test
1880 Oak St., San Diego, CA 92108

Date: 7/12/2020

DESCRIPTION OF ITEMS

ITEM 1 - ENGAGEMENT RING

One lady's engagement ring with an offset shank set with one (1) round diamond and accented with nine (9) smaller round diamonds.

Total Diamond Weight: 1.73 ct

Item Attributes

Weight: 3.45 gms
Metal: 14K yellow and white gold
Manufacturing: Cast and assembled
Condition: Good
Finish: Polished
Setting: Prong, bead set
Trademark: None

Diamond Attributes

Shape and cut: Round brilliant
Measurements: 6.62 x 6.62 x 4.40 mm (approximate)
Weight: 1.26 ct (calculated)
Clarity grade: SI1
Color grade: K
Cut: Fair
Finish: Good
Fluorescence: None (Iw)
Lab report: GIA 12345

Diamond Melee Attributes

Shape and cut: Round full cut
Weight: 0.052 0 ct each
Number of diamonds: 9
Total Weight: 0.47 ct (estimated)
Clarity: SI
Color: H-I
Cut: Good
Finish: Good

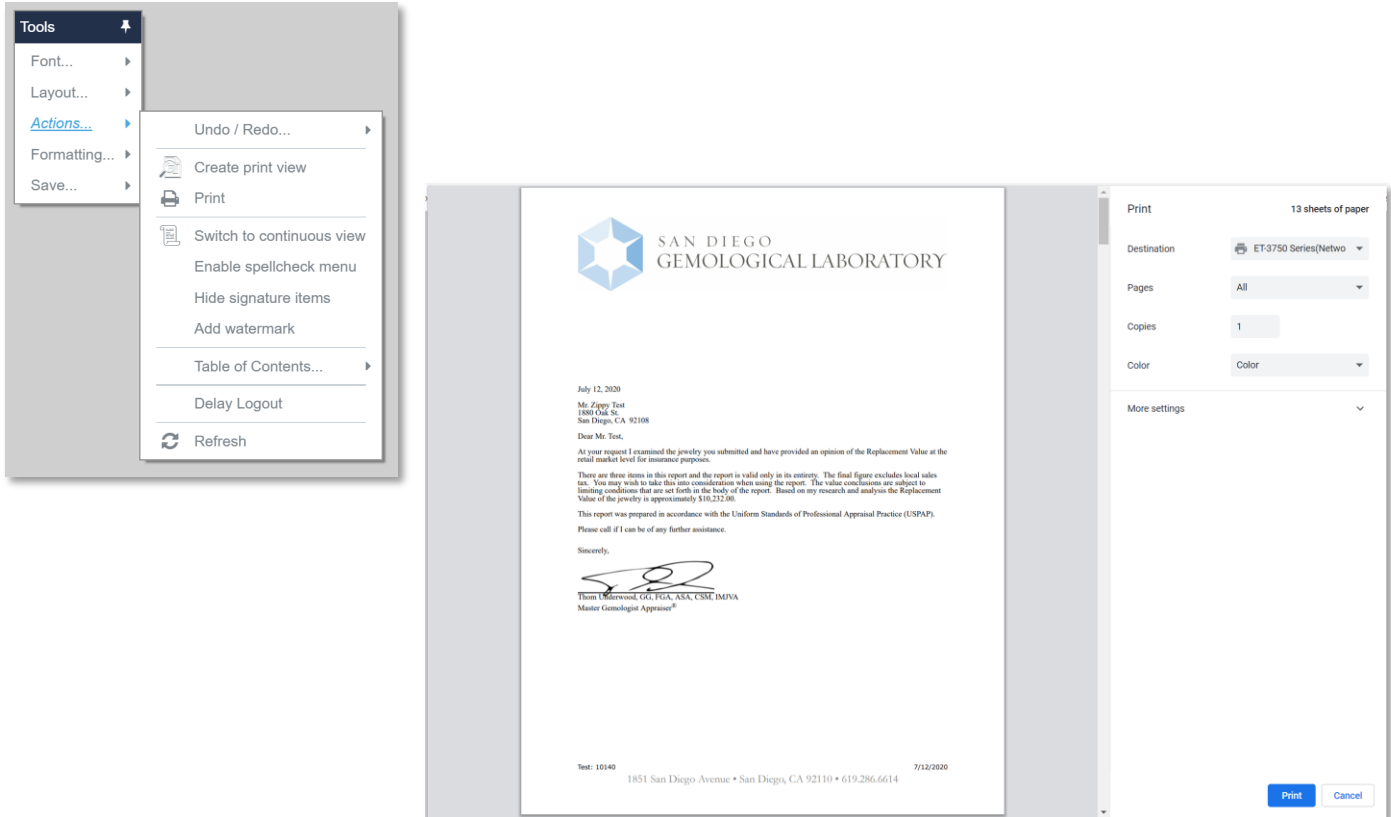


The value of this item is based on a comparable new item. For the intended use of this report and chosen value type, the cost approach to value was utilized by analyzing anticipated wholesale costs of materials and labor to which was applied the modal markup to retail. Due to the quality, condition, and relative ranking of this item within its class, the relevant market chosen was the primary retail, brick and mortar, single-store level of the gems and jewelry trade. The overall value trend in that market within reasonable proximity to the valuation date was generally stable.

Replacement Value (NEW) Excluding Tax \$7,757.00

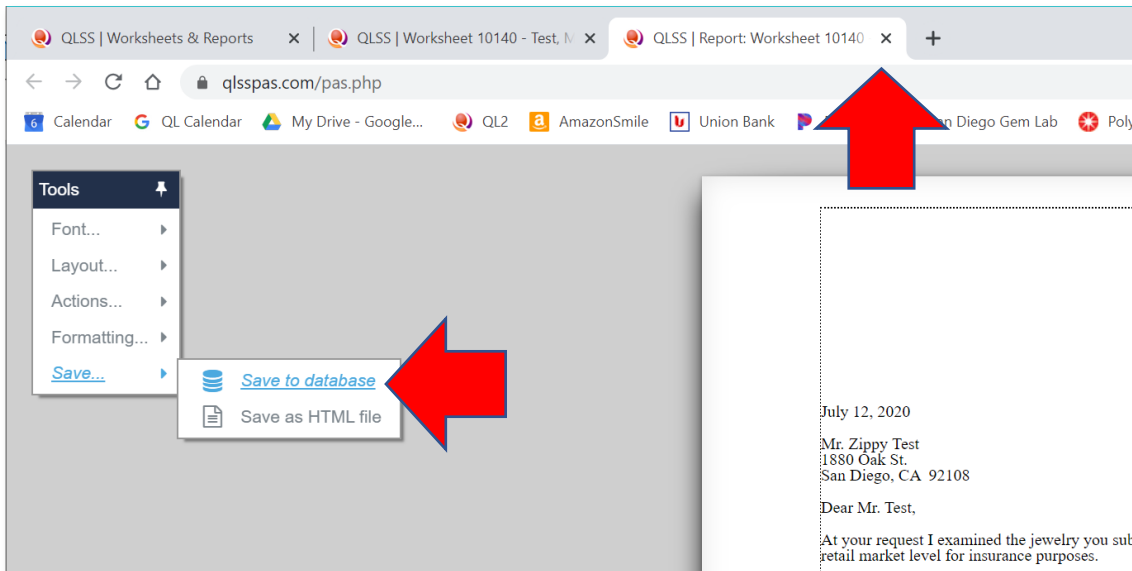
Printing and pdf

To print click on Actions in the menu, then Print.



Closing and Saving

Save the report by clicking on Save in the menu and choosing Save to Database.



Once saved, close the Report/Worksheet tab. Back at the Worksheet click on the Save button then close the Worksheet tab to return to the Worksheet folder.