Update Reports & Copying Existing Items

Contents

Creating Update Reports & Copying Existing Items

Overview

When doing an appraisal update for a client it is desirable to leave the original Worksheet/Item data untouched. By following the tutorial below your original worksheet and report will remain unaffected while the new worksheet will contain your new edited/updated data.

An update is a new appraisal using previously entered data (client, item description, etc.). Therefore to create an update appraisal start a New Worksheet, choose the client from Select Client (or add a New Client)…

New Worksheet

On the new Worksheet assign the appropriate Worksheet Template that satisfies the intended use of the new appraisal.

Update Items

Next click on the Create Update button to open the Update Items tab.

Note: Alternatively, you can click on 'Copy Items' to open the Update Items tab.

Select Items

The Select Updates window will open showing all the items appraised for that client. If you want to see all the items for ALL clients click on 'From all clients'.
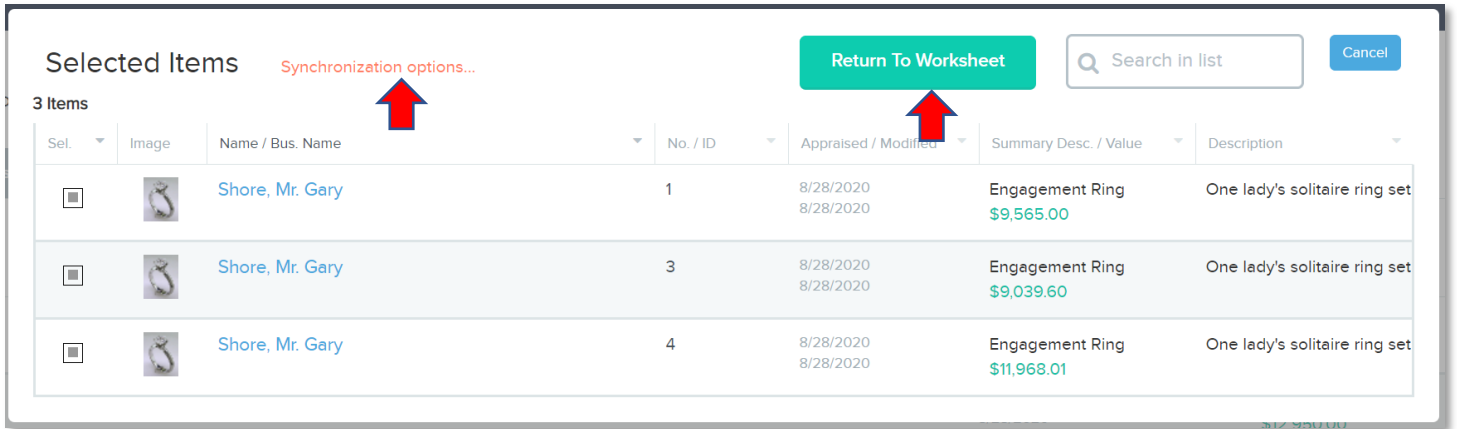
The Select Updates window opens in the 'Select From Items' view, however, if you want a Worksheet view click on the 'Select From Worksheets' tab.

Proceed by checking the boxes for the Items you want to copy.

Note: To help identify items you can view the image full size by clicking on it. Click again to close it.

Confirm Selections

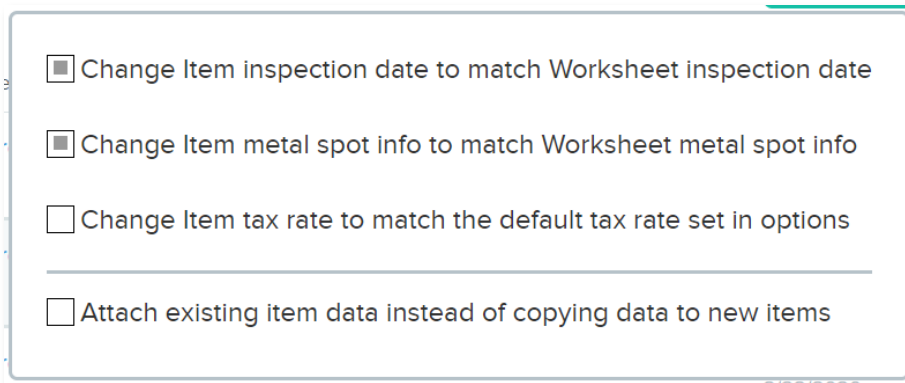Once the Items are selected click on the Confirm Selections button to proceed to a listing of the selected items to copy.

Synchronization Options

Clicking on 'Synchronization options' provides the following options…

Change Item inspection date… and Change Item metal spot info… are defaulted to occur, however, uncheck if not desirable. Change Item tax rate will update the current tax percentage set in the Options dialog.

Attach existing item data (as opposed to copying the item data) will attach the original Item to the new Worksheet. Any change made to that Item will be reflected in all other Worksheets wherein the same Item is attached.

> *Note: As an example, this would be useful for breaking items into separate Worksheets but inappropriate for an update appraisal where values and value descriptors (e.g. Fair Market Value) might be changed and historical data should be preserved.*

Click on the Return to Worksheet button to return to the Worksheet and proceed with the report. If there are additional new items, they can be added to the Worksheet by clicking on the New Item button.