



Update Reports & Copying Existing Items

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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)...

Business / Last / First	Street / Village	Action
Shore Gary	124 Sunset St. El Cajon, CA 95786	Select
Smith Roberta	2345 Maple Ave. Portville, NY 14235	Select

New Worksheet

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

Worksheet 52 Manage Groups...

Client Name edit set active records
Shore, Mr. Gary

Existing Reports 0 New Report

Custom Fields

Worksheet ID
Inspection Location
Appraiser's Office

Summary Message

Worksheet Template
Estate/Trust - Estate/Trust Appraisal

- None
- Descriptive Report
Quality/Condition Report
- Equitable Distribution
Equitable Distribution Appraisal
- Estate/Trust
Estate/Trust Appraisal
- Insurance
Insurance Appraisal
Insurance Documentation
- Liquidation
Liquidation Appraisal
- Litigation
Litigation Appraisal

0 Items New Item Copy items...

Update Items

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

Worksheet 52

Client Name: Shore, Mr. Gary

Worksheet Template: Estate/Trust - Estate/Trust Appraisal

Existing Reports | New Report | Create Update | Add New Item

Worksheet ID: [] | Appraisal Category: Estate/Trust

Inspection Location: Appraiser's Office | Value Description: Fair Market Value

Summary Message | Personalized Message

0 Items | New Item | Copy Items

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

Select Updates

Select Items From client only From all clients

Select From Items | Select From Worksheets

9 Items

Selection	Image	Name / Bus. Name	No. / ID	Appraised / Modified	Summary Desc. / Value
<input checked="" type="checkbox"/>		Shore, Mr. Gary	1	8/28/2020 8/28/2020	Engagement Ring \$9,565.00
<input type="checkbox"/>		Shore, Mr. Gary	2	8/28/2020 8/28/2020	Ring \$12,950.00
<input checked="" type="checkbox"/>		Shore, Mr. Gary	3	8/28/2020 8/28/2020	Engagement Ring \$9,039.60
<input checked="" type="checkbox"/>		Shore, Mr. Gary	4	8/28/2020 8/28/2020	Engagement Ring \$11,968.01
<input type="checkbox"/>		Shore, Mr. Gary	5	8/28/2020 8/28/2020	Engagement Ring \$10,925.32

No Images | Weight | Summary Description

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'.

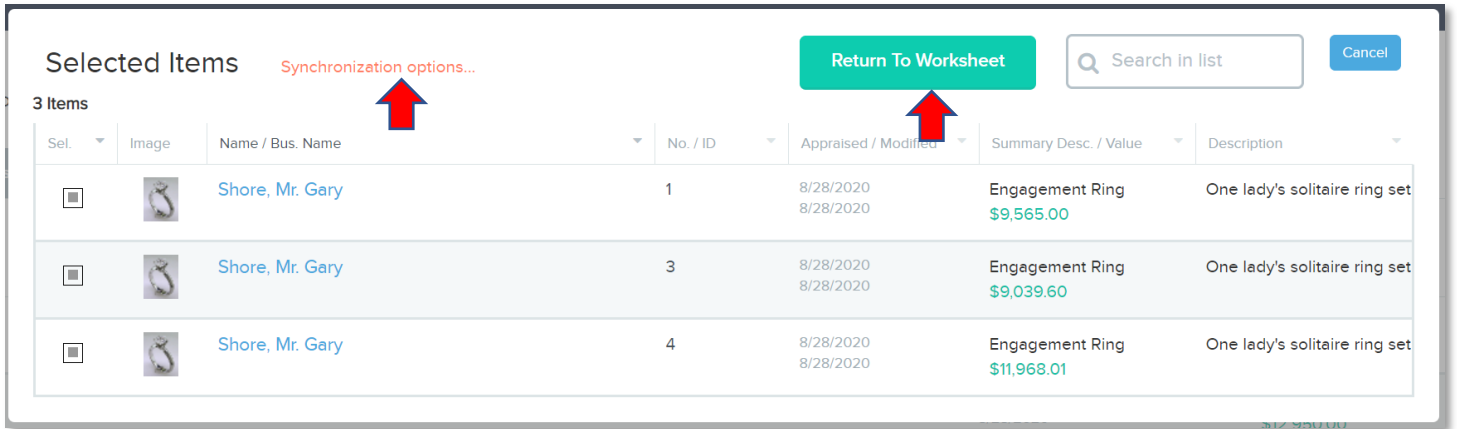
The Select Updates window opens in the 'Select From Items' view, however, if you want a Worksheet view click on the 'Select From Worksheets' tab.

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.

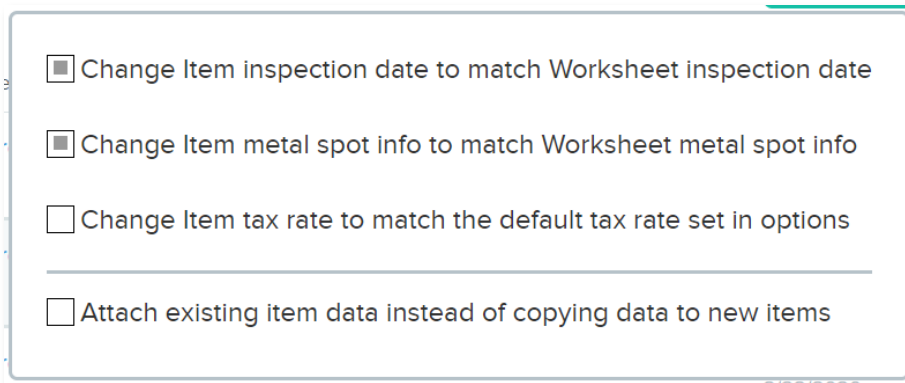


The screenshot shows a window titled "Selected Items" with a sub-header "Synchronization options...". At the top right, there is a green "Return To Worksheet" button and a search box labeled "Search in list" with a "Cancel" button. Below the header, it says "3 Items". A table lists three items, each with a selection checkbox, an image of a ring, and the name "Shore, Mr. Gary". The table columns are: Sel., Image, Name / Bus. Name, No. / ID, Appraised / Modified, Summary Desc. / Value, and Description. Two red arrows point to the "Synchronization options..." text and the "Return To Worksheet" button.

Sel.	Image	Name / Bus. Name	No. / ID	Appraised / Modified	Summary Desc. / Value	Description
<input checked="" type="checkbox"/>		Shore, Mr. Gary	1	8/28/2020 8/28/2020	Engagement Ring \$9,565.00	One lady's solitaire ring set
<input checked="" type="checkbox"/>		Shore, Mr. Gary	3	8/28/2020 8/28/2020	Engagement Ring \$9,039.60	One lady's solitaire ring set
<input checked="" type="checkbox"/>		Shore, Mr. Gary	4	8/28/2020 8/28/2020	Engagement Ring \$11,968.01	One lady's solitaire ring set

Synchronization Options

Clicking on 'Synchronization options' provides the following options...



The screenshot shows a dialog box with four options, each with a checkbox:

- Change Item inspection date to match Worksheet inspection date
- Change Item metal spot info to match Worksheet metal spot info
- Change Item tax rate to match the default tax rate set in options
- Attach existing item data instead of copying data to new items

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.