



# Appraisal Templates

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## Introduction

The Appraisal Templates feature offers a selection of templates so that your appraisals suit your tastes and needs. This tip sheet outlines how the Appraisal Templates feature works.

## System Options

Before using the new Appraisal Template feature, be sure to check these new System Options:

<b>Appraisal Template Folder Location</b>	The location of the appraisal template file, e.g., C:\Program Files (x86)\ajsllc\Edge\appr.
<b>Appraisal Template Default File</b>	The appraisal template file, e.g., C:\Program Files (x86)\ajsllc\Edge\appr\appr.htm. Leave this field blank to use the AJS built-in template. We recommend you speak with The Edge Support Team before changing this option.

## Using the Appraisal Templates

As you know, in The Edge, there are three phases to working with appraisals:

- Intake
- Appraisal Creation
- Pickup.

Using appraisal templates comes during phase two, appraisal creation.

To find and manage appraisals:

1. Select **Find ► Appraisal** from the **Services** menu.
2. Open the appraisal record with which you wish to work. The **Appraisal Edit** window will appear with the **General** tab selected.

3. Edit fields as needed.
4. Select the **Appraisal Details** tab.

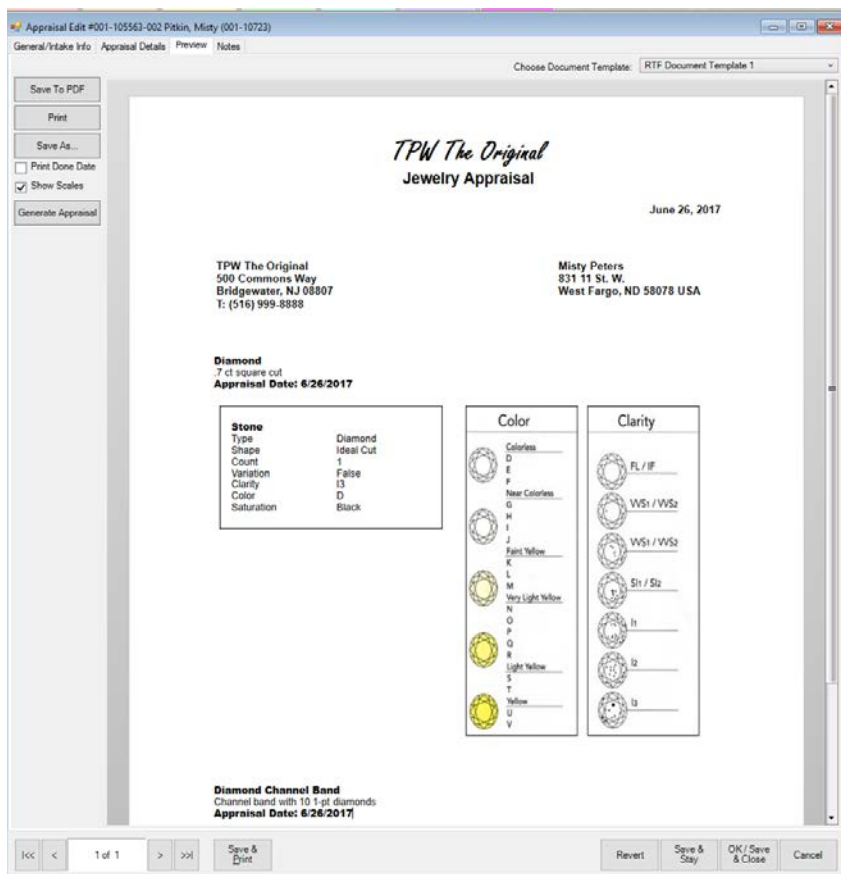
Step	Photo	Paragraph Header/Text	Value
2		Diamond Channel Band Channel band with 10 1-pt diamonds	300.00

Fields and options in the **Appraisal Details** tab include:

- Title** The title of the appraisal document.
- By** Associate or vendor who will conduct the appraisal.

<b>Show paragraph Values</b>	Show these values on the appraisal document. Must be included for appraisal to show the details of the item.
<b>Show value summary</b>	Show the value summary listing on the appraisal document. Must be included for a total value to appear on the appraisal.
<b>Print Intake Photo</b>	Include the photo taken at intake on the appraisal document.
<b>Print intake info as first paragraph</b>	Include information taken about the item as the first paragraph of the appraisal document.
<b>Photo</b>	Take a photo of the item at this time. See the section entitled Photographing an Item for more information.
<b>Description</b>	The paragraph title to follow on the appraisal document. The following field contains space in which to write the description.
<b>Use Sum Inst</b>	Rather than specifying an appraised value, use the sum of the part values.
<b>Step</b>	Lists the step number listed.
<b>Photo</b>	Shows a photo of the step.
<b>Paragraph Header/Text</b>	The paragraph title and text describing the step.
<b>Value</b>	The value of the step.
<b>New Page</b>	When checked, starts the paragraph on a new page in the generated appraisal document.
<b>Sum</b>	The total value.

- For each item in the lot, or for each aspect of the item to be described, select **Add**. A line item will appear on the **Appraisal Edit** window.
- Enter a name for the paragraph.
- Enter the text describing the item or aspect.
- Enter the value.
- Enter as many items or aspects as needed by repeating steps 5 through 9.
- Rearrange the order in which the paragraphs appear by selecting **Move Up** or **Move Down**.
- Edit or complete these as desired and select the **Preview** tab.



The **Preview** tab shows an approximate print preview of the appraisal. The Edge comes loaded with five appraisal templates, one default and four alternates. Based on the locations you set in System Options, your chosen default template will be used automatically. Other available templates will appear in the drop-down menu.

Options in the **Preview** tab include:

<b>Choose Document Template</b>	Select the desired appraisal template, if not the default. If you do not see a list of templates, check your <b>System Options</b> . As described above, there should be a value in <b>Appraisal Template Folder Location</b> .
<b>Save to PDF</b>	Save the appraisal as it appears so far to a PDF file.
<b>Print</b>	Print the appraisal as it appears so far to paper.
<b>Save As</b>	Save the appraisal as an .rtf.
<b>Print Done Date</b>	When printing, The Edge can print the current date on the appraisal or the date the appraisal was completed. This option indicates that you want the completion date printed.
<b>Show Scales</b>	If there is a diamond, the appraisal will include a graphical guide of color and clarity for reference.
<b>Generate Appraisal</b>	Refreshes the preview to reflect changes in settings.

12. To select a different appraisal template, select one from the **Choose Document Template** drop-down menu. Note that if you are editing an existing appraisal, the template you used before will be used unless you select a different one.
13. Select the appropriate save option from the **Record Navigation Bar**.
14. To see a preview of the actual printout, select **Print Preview**.
15. To retain the appraisal completion date on the printed copy, select **Print Done Date**. Otherwise, the current date will appear.
16. To print the document, select **Print** from the **Preview** tab. We recommend printing to the report printer.
17. Use the **Notes** tab to record any unofficial information about the appraisal or the pieces included in it.

## Editing Appraisal Templates

If you wish, it is possible to edit these templates or create new ones from an old one and make changes to that. To do so:

1. Use Windows Explorer or Windows File Manager and browse to The Edge folder where the templates are kept. See your System Options to locate that path.
2. Open the file with Microsoft® Word or another .rtf editor.
3. Save the template under a new name, if you wish to create a new template.
4. Make changes to the template and save it. You can change the location of text, add new text, and change font size and type. You can add text and some design elements. Feel free to work with the design and test it in The Edge.



- **Notice that there are merge fields built into the template. They are delineated by brackets ({mergefield}). If you delete one of these fields, that data will not show in the generated appraisal.**
- **If the file is open in your .rtf editor and you try to use the Preview Appraisal function, The Edge will give an error.**