**IMAGEsoft's Appraise Link Instruction Manual**

## HOW TO CREATE AN APPRAISAL

Start at the MAIN MENU. Click on APPRAISALS. The WORK WITH APPRAISALS screen appears.

This screen stores your appraisals, as many as you desire.

At this point you can create your own disclaimer that appears on every appraisal you create.

To do this press the button that says View/Edit Disclaimer Text. Type what you wish limiting it to a few short paragraphs. We limit the amount of text here to maintain the format in the appraisal.

We will start by creating a new appraisal.

Let's say a customer comes in and buys an item already in our database. This procedure takes three easy steps.

1. Click on ADD NEW APPRAISAL. The ADD NEW APPRAISAL window appears. (See Illustration) Move your cursor to the customer name box. Either enter the name, or scroll down, until you find that name. Note that the full information appears.  (Remember, we are doing an appraisal for a customer already in the database.)

2. Click on the INVENTORY ITEM tab. A new screen appears. (See illustration) Go to the ITEM TO APPRAISE box. Either enter the Inventory # or scroll down until you find it.  Note that a picture appears, (unless the image is not in your VI database.)

3. Click the APPRAISAL TAB. A new screen appears.
   Type in your description. It can be as short or
   as long as it needs to be. Now fill in the DATE
   (if desired), APPRAISED VALUE, and APPRAISED BY
   boxes.

NOTE:   When you select the Appraisal Tab you get
the option to select an appraisal that is in the
"Appraisal Template" function.

The appraisal template function is a long button
underneath the appraisal field. This button takes
you to a unique function in appraisal software that
allows you to speed the process of creating a
quality appraisal.

Once you press the Appraisal Template button you
are in a screen that has two drop down menus on the
right hand side of the screen. On the left you will
see two options, a System Option and a Personal
Option. Select the System Option to start. Then
click the down arrow to select the Category of
Appraisal and the Template name that bests
describes the object you are appraising.

NOTE:" You will note that in each system template a
disclaimer appears in the first paragraph"

Once you have imported the template into the
appraisal text box (by pressing the IMPORT Selected
Appraisal button) read through the appraisal and
remove the information that doesn't apply
(highlight the text and then hit the back space
button) and type in the information that you have
learned about the product by examining it.

NOTE:" The Appraisal Template will help you write consistent appraisals. If you don't agree with the format or have your own style you can save your favorite appraisals to the template function and call on them to help speed the process of writing appraisals quickly and concisely." See Personal Templates

To print, click on the PRINT APPRAISAL button.

To save the appraisal, click on SAVE APPRAISAL.

Personal Templates give you the opportunity to import Appraisals you've created that you feel, with some modification, will be repeated. You can add your own more detailed disclaimers in the event the Brief Disclaimer doesn't offer enough information the client. In order to add to the Personal Templates do the following.

Click on the Appraisal Templates Bar (located under the text box in Appraisal Tab).

Select Personal under the Templates section.

Select New on the right hand side of the screen in the Category Field.

Enter the New Category Name. (If the name of the Category exists select the down arrow and select it from the list).

Once you enter the name of the Category select OK. That will add the name to the list.

Once again Select the name of the Category from the list and then select New from the Template Name list.

Before entering the name of the Template you get
the option of writing the Appraisal. Write the
appraisal (or copy and paste from a word document)
and when you are finished select SAVE TEMPLATE.
When you do you will be prompted to name the
Template. This is when you write the appropriate
name for the template that bests describes your
appraisal. Click OK. The Template has been saved
and is available when you need it.

NOTE:" Anytime you wish to import the template into
the appraisal you are working on, press Import,
this will populate the appraisal with the template
information."

WRITING AN APPRAISAL FOR A NEW CUSTOMER

Here's a typical situation. A new customer comes
through the door with an item to appraise. We've
never seen the customer or the item before. What do
we do?

From the Main Menu click on Appraisals and begin at the WORK WITH APPRAISAL SCREEN. Click on ADD Non-Inventory APPRAISAL. The ADD NEW APPRAISAL screen appears. Click on NEW. A new screen appears, that says ADD CUSTOMER INFORMATION.

Type in the information about the new customer.

NOTE:   ENTERING CUSTOMERS IS ALMOST INTUITIVE, BUT IF YOU WANT COMPLETE INSTRUCTIONS, GO TO THE SECTION ON "SUPPORT FUNCTIONS."

When you're done, click ACCEPT NEW CUSTOMER INFO.

This customer is now in your database.

==APPRAISING AN ITEM NOT IN INVENTORY==

We still have to deal an item which we've never
seen before. What do we do?

First, we take a quick picture of the item with a
digital camera. We transfer the image to a
directory on your computer. "My Pictures" is
generally the default directory but you can put an
image in any directory you choose.

You can modify the image as you wish using any type
of software for editing images.

> **NOTE:**   "Try to keep the image size at 40k to 100k.
> These are generally easy images sizes for your
> computer to manipulate and if you want to email the
> appraisal you will keep the file to a relatively
> small size." Appraise link will handle large image
> sizes for very high quality printing.

- You can set the image path for directly
  importing images in the Support Functions under
  the Setup tab but for non inventory items you
  can browse to any directory and add the image.

- You can name the image alphanumerically if that
  has meaning for your company. (Using a naming
  scheme may help retrieve an appraisal when
  using the powerful search function in the
  appraisal software.) In the event you are
  unconcerned about the image naming scheme use
  the default name the camera provided.

After you have browsed to the image you can import
it into the appraisal. Once you have the image in
the Item tab click on the Appraisal tab and write
your appraisal. (Here too, you can use the
Appraisal Templates if you wish)

Click "Save New Appraisal" or "Print Appraisal" to
save or print. You can print the appraisal from the
list once you hit save. You can also create a
digital image of the appraisal from the Work with
Appraisal Screen (See Below for further directions
on how to work this function).

ITEM LABELS

Under the Item Information you can change or remove
the Labels on the information that shows up on the
right side of the appraisal in the middle of the
page. (THIS INFORMATION WOULD BE STONE TYPE,
WEIGHT, METAL TYPE, AND TOTAL WEIGHT). You can
change or delete labels as you wish. You can alter
the fields and they will format on the page as you
write them. Appraise link will remember the
information as it was last formatted in the
previous appraisal.

MAKING CHANGES TO APPRAISALS

If you made an error while writing the appraisal,
or wish to change any information, click the EDIT
APPRAISAL box. Make your corrections. Then click
SAVE CHANGES TO APPRAISAL. VI will then return to
the WORK WITH APPRAISALS screen.

TO DELETE AN APPRAISAL

You also have the option of deleting an entire
appraisal. To DELETE an appraisal go to the WORK
WITH APPRAISALS screen. Click on the customer's

name. It should highlight. Then, click DELETE
SELECTED APPRAISAL. As it does in many cases, VI
will ask you if you're sure you want to DELETE the
appraisal before it actually does it.

<div style="border:2px solid black; padding:10px;">

**SOMETHING TO KEEP IN MIND**

Deleting an APPRAISAL will remove the written
appraisal, but it will not delete the actual item
from the database unless it is a non inventory
appraisal. You'll still be able to search for and
find it.

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## Search Engine

We have added a powerful search engine to the
appraisal functionality. We have also given you the
ability to add your own disclaimer portion of the
appraisal.

The search engine is accessible in Work with
Appraisals section. Select the Find Appraisal
Button, enter the criteria you need to find, select
Find Matching Appraisals, and then select View
Matching Appraisals. In order to see all of your
appraisals from the Find Appraisals screen simply
select Find All Matching Appraisals without putting
in any search criteria you will see the number of
appraisals you have and when you select View
Matching Appraisals you will see **all** of your
appraisals.

## Appraisal IMAGE

Now you can easily create an image of the appraisal
along with the output for where you would like the
image to go.

This feature doesn't affect printing and will enhance your ability to quickly communicate with your customer digitally.

In order to do this;

- Create your appraisal as you normally would.

- Close the appraisal and go to the appraisal list, pick the appraisal, and select "create a digital image" button.

- The first time you do this you will get the Create a Digital Appraisal screen which allows you to select the directory that the image goes into.

- Create your path by pressing the square rotary button at the end of the image path line, pick your path to place the image, name the image and select the type of format for the image.

- Sequential and alphabetic are options you can select should you have more than one image created when generating the appraisal image.
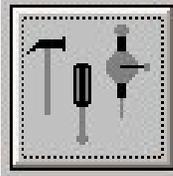
When you press the Save button you should find the appraisal image (or images) in the directory you selected.

# Adding Inventory

You can use Appraise Link as an inventory program

Double click on Appraise Link, to open the program.
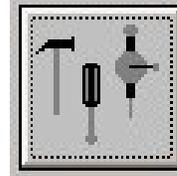
When the MAIN MENU APPEARS, click on [icon] in the main menu screen.

Go to the Add Inventory Tab.

The ADD INVENTORY ITEM screen has three tabbed screens. The first screen is PRIMARY INFO.



Jewelry type: Pick from the list or add a new category

Fill in as many or as few of these fields as necessary. Keep in mind: In most fields you don't even have to type a word! Just scroll down the

small arrows, click, and select the category that
applies.

When you're done with PRIMARY INFO, click the tab
that says SUPPLEMENTAL INFO AND IMAGE. Add the
appropriate information in the fields and add an
image.

Note: "You must include an Acquisition Price even
though you might not know what it is. Put a 0
(zero) in this space. Your fine as long as you put
a whole number in the field."

If you fill in the MARKETING TEXT with an appraisal
like description of the item your putting in
inventory Appraisal link will automatically import
the text into the appraisal when you want to
appraise the inventory item. If your not in
agreement with the appraisal text once it has been
imported to the appraisal you can remove or
overwrite the information with new text.

Note that the picture window says IMAGE NOT
AVAILABLE. VI is saying that it still needs an
image to go with our appraisal.

If you've followed along, you've already captured
the image. All we have to do is find it. And that's
easy!

1. Remain in the SUPPLEMENTAL INFO AND IMAGE
   screen. Click on the NEW box.  A small screen
   that says "Select an image…" appears.

2. On the right is a small, gray box with three
   dots. Click on that box. Your directory opens.
   (The Directory is like a folder full of folders.
   Snappy is one of the folders.)

3. Click on the bottom arrow in the box that says
   DIRECTORY. Hold the mouse down until you see the
   directory that has your image. Double click on
   the directory and select your image.

4. On the left you will see a series of numbers,
   (or names.) If you saved the image properly, your
   image item is one of those numbers. Find your
   image and click on it. If it's the right image,
   click ACCEPT SELECTED IMAGE. The image moves to
   the SUPPLEMENTAL INFO AND IMAGE screen.

5. Click SAVE NEW ITEM AND RETURN TO SUPPORT. This
   will take you back to your ADD NEW INVENTORY
   screen. You have now gathered all the information
   you need about the item.

6. Add the selling price if you wish and Save the
   New Inventory item and Return to Support.

## Adding a New Customer



This part is pretty simple. When you want to add a new customer simply select the Add New Customer button. That will take you to a screen where you can fill in all the relevant information that you want to keep about your customer.

Note: "Remember to keep the customers email address. This will be very helpful when updating appraisal information and sending the information to the customer."



Editing the customer is necessary when something about the customer has changed. If they have moved or changed contact information in any way, selecting this button will allow you to update the customers information very quickly.

Note: "Any information you wish to add about the customer(telephone conversation, family names,

dates that are important, can be added in the Notes
field in the when you access the customer's
information."

As for deleting customers, that should never
happen, but if it does, click the "Delete Customer"
button and pick the customer that is no longer with
us…