

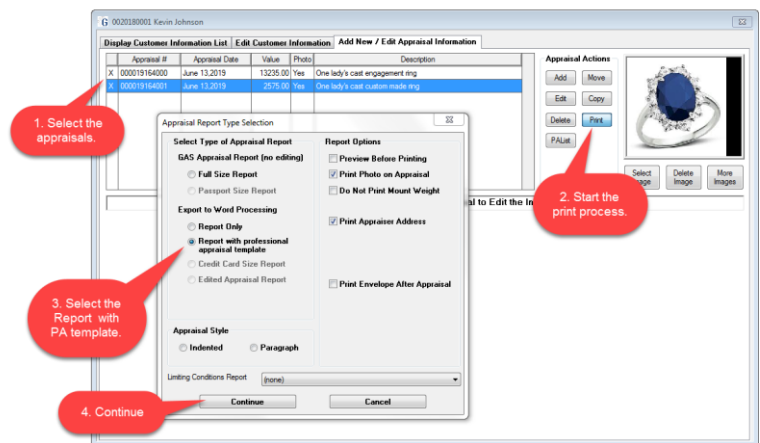
**Initial Requirements:**

- You MUST have Microsoft Word to use this feature.
- You should have ample unused hard drive space.
  - ✓ Word documents can be large and take up hard drive space over time. The program may run slower when creating the full appraisal document with lower RAM memory.
- Purpose and function must be turned on (default is on when first installed) and selected in the mount valuation/mark-up window.
  - ✓ In the GAS software, go to System Functions>System Setup>Print Setting Defaults and check 'Print Purpose and Function.'
- The PA requires the date location to be on the bottom of the appraisal (default location).
  - ✓ Go to System Functions>System Setup>Report Print Layout Settings>Appraisal Defaults and set the date offset to 0.0.
- Match all fonts in GAS and templates. If Calibri is selected in GAS, then select Calibri in the templates as well.
- When the final document is generated, **you must review document before signing.**

**Important:**

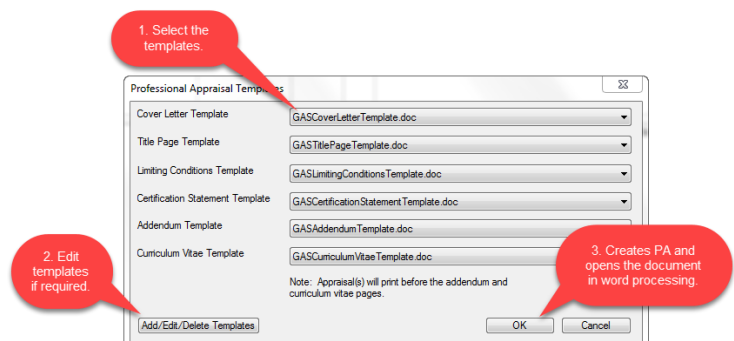
If you need to make any edits to an individual appraisal that cannot be done in GAS, make those changes FIRST in the export to Word processing feature. The PA print process will then use your edited and saved word documents when creating the PA.

To begin, select the appraisals you would like to include in your professional appraisal document (PA). Then click on Print under Appraisal Actions. Select the Report with professional appraisal template and click on continue.



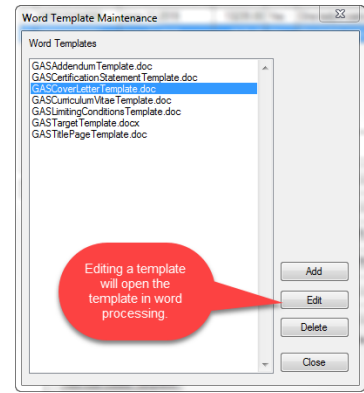
The Professional Appraisal Templates window will appear. Select the templates that you would like to use for your PA. Not all templates are required. If you only want to print a Title Page and Limiting Conditions page, then select those and leave the other templates blank. *There is a blank field at the top of all the dropdown for your selection.*

You can edit a template from the Professional Templates Window by clicking on Add/Edit/Delete Templates button.



This will display the Word Template Maintenance window with a list of all templates available to be included in a PA. Highlight the template you want to edit and click on the Edit button.

- Please note that this feature is for small changes only. If you are editing your templates for the first time, please go to the section below on “EDITING and SAVING Templates for the first time with your company information.”



The template will open in Word. Make your change and save your template. You can then continue with the Close button on the Word Template Maintenance window. Then click on OK in the Professional Appraisal Templates window to create the PA.

When generating the report, wait until you see the “Report is complete” dialog window appear. Do not try and open Word during this process. This may take several minutes if you are creating a PA with more than 10 appraisals. You might notice Word opening in the task bar at the bottom of your screen. It is loading the individual appraisals and adding to one document to create the PA.

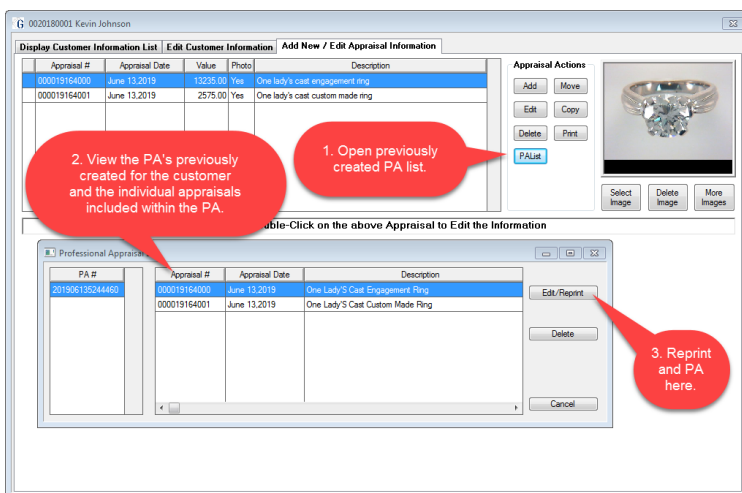
Click on OK, and then open the Word document located in the task bar.

Review your document. Below are common issues that can arise and solutions:

- If the page numbers are out of sync, try entering the footer by double clicking the footer area.
- If the number of pages field on the cover letter page is wrong, click the number and press F9 to refresh.
- Make sure your heading styles are correctly set. Anything that is set as heading 1, 2 or 3 will appear in the Table of Contents.
- If two different documents appear on the same page, you may have accidentally deleted the page break in the template. Example: If the CV displays on your addendum page, then go into the addendum template and add a page break at the bottom (see *Editing and Saving Templates section on page 3*).

Print your PA document using the Word print menu. If you are saving your documents in PDF format, using Word, click on File>Export>Create PDF/ XPS Document. You can also use this pdf of your appraisal to email to your client.

If you want to email an appraisal and are also using Microsoft Outlook for email, click on File>Share>Email>Send as attachment. These directions may change depending on your version of Word.



To Review/Reprint a PA, click on PAList under Appraisal Actions.

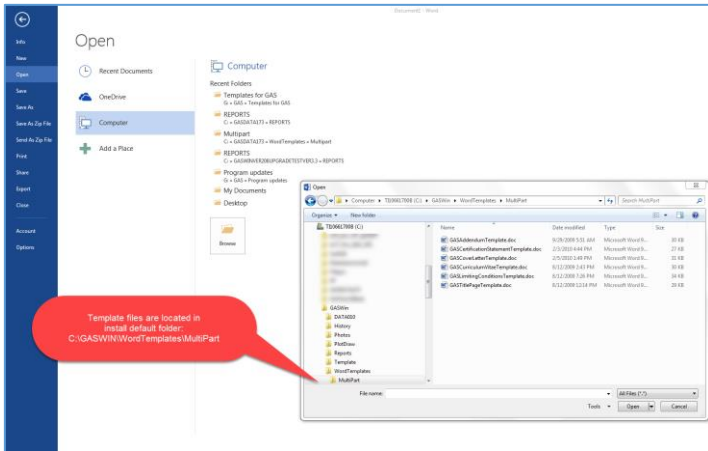
A list will appear with all the PA's that have been printed for the customer. The PA numbers are listed along with the individual appraisal numbers that were originally included in a specific PA report. Click on the Edit/Reprint button. The PA will open in Word. Print the PA document from the Word application.

**EDITING and SAVING Templates for the first time with your company information:**

When making changes to the templates, its best to copy your text into our provided templates.

- This allows for easier creation of template documents and might alert you to text you didn't have in your documents.

You will need to access the word template files located in your dataset folder for the GemGuide Appraisal Software. The default install folder is C:\GASWIN\WordTemplates\MultPart.



Open your Word program. Click on File>Open>Computer> (your dataset file location) and open the individual documents one at a time.



Please insert your logo to all templates that state "Your Logo Goes Here."

You can change any text within the documents, but leave all the merge fields enclosed in brackets intact. They are data fields that use data from the GAS software that you previously entered. You can move the merge fields but they must remain intact within the brackets. You might want to make just a few changes first, then test your document before continuing. This will make detection of errors easier.

You can also open a document and change it to reflect a different purpose for the appraisal, i.e. liquidation or estate. After making your changes, use the SAVE AS feature and change the name, i.e. to CoverLetterEstate. This file needs to be saved in the same folder as the other templates for GAS to recognize for use in the dropdowns for future PA.

The following keyboard shortcuts may help you during the update template process.

Keyboard shortcuts:

1. Enter page break: CTRL + ENTER
2. Show paragraph symbols: CTRL + \* (on some keyboards: CTRL + SHIFT + 8)
3. Show fields: ALT + F9
4. Manually update field: Click on field, then press F9

Additional Note:

1. The Edited appraisal feature only works on regular reports. If you use the edited appraisal feature, save your document, and then generate a PA, you will get an error message and the system may freeze.

If you need help with this process, please set up an appointment with us and we can help you. We know that setting up the templates is the hardest part of this feature. Once it is complete, printing is your only task.

Please call us at 847-657-0555 to set up and appointment.

Thank you,  
The Gemworld Staff