



Customizing Report Options

This document provides instructions for customizing report display options in ACI.

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Report Options

Report Options include global settings for the Addendum, carry forward text, market grid adjustments, and other options. Select options for photos, data fonts, firm information, numeric options, signatures, the Title and the Invoice.

1. Click **Options > Report** and select a menu item.
2. Select options and click **OK**.

NOTE: Selecting *Apply to Future Reports Created with Default Options* will not affect reports created with existing templates. To apply settings to an existing template, edit the template and select the option.

Global Options

Addendum - Header Text

Header Text displays in fields that overflow to the Addendum. "See Attached Addendum" is the default *Header Text*. Enter custom *Header Text*, if desired.

Print Appraiser/Supervisory Appraiser Signatures at Bottom

Select this option to include signatures on printed copies of the Addendum. This option is deselected by default.

Print Page Numbers at Bottom

Select this option to include page numbers on printed copies of the Addendum. This option is selected by default.

Carry Forward Text

Select the Carry Forward election.

Never

A change to information in a source field will not update the destination field. The information in the two fields will differ.

Never when user data

A change to information in a source field will not update the destination field, if the user has edited the destination field.

Always

A change to information in a source field automatically updates the destination field.

Prompt when user data

A change to information in a source field prompts confirmation, *Yes* or *No*, before updating the destination field, if the user has edited the destination field.

Capitalize

All carry forward fields, both source and destination, appear in upper case letters.

Market Grid Adjustments

Enter the tolerance levels for calculating *Gross*, *Net*, and *Line* adjustments on the Market Grid. For example, enter 5 in *Line*. Any line adjustment greater than plus or minus five percent displays in a different color.

Display Customer Information

Select this option to include the heading box in online displays and printed copies of the Addendum (printed copy only), photo, map, and sketch pages. The heading contains the Borrower Name, File Number, Property Address, Case Number, and Lender Name. This option is selected by default.

Use Times Roman Layout

Select this option to use the Times Roman Font on supplemental report pages: Title Page, Invoice, Letter of Transmittal and Photo and Map Pages. This option is deselected by default.

Photo Options

3x5 or 4x6

Select the photo size. The default photo size is 3x5.

Display Photo Box

Select this option to print a border around each photo. This option is selected by default.

Resize and Crop Photo to Fit in Photo Slot

Select this option to scale photos to fit the photo slots. This option is selected by default.

Data Fonts

Text on the Form

Click **Choose Font** and select the font style, size and color of text on the Form. The default font is 9 pt. Arial.

Text in the Addendum

Click **Choose Font** and select the font style, size and color of text in the Addendum. The default font is 9 pt. Arial.

Addendum Headings

Click **Choose Font** and select the font style, size and color of text in the Addendum Headings. The default font is 9 pt. Arial.

Capitalize Addendum Heading Text

Select this option to display Addendum Heading Text in upper case letters. This option is deselected by default.

Firm Information

Use *Firm Information* to enter your company's name and address. Company name is displayed in the header of the *Invoice*, *Title*, and *Letter of Transmittal*. Company address is displayed in the footer of the *Invoice*, *Title*, *Letter of Transmittal*, photo pages, sketch pages, and map pages. Company logo is displayed at the top of the page on the *Invoice*, *Title*, and *Letter of Transmittal*, and in the lower right corner on photo pages, sketch pages, and map pages.

Adding a Company Logo

1. Click **Change**.
2. Browse to the file location, select the logo, and click **Open**.

NOTE: .BMP, .JPG, .TIF, and .PCX are supported formats for logos.

Removing a Company Logo

1. Click **Remove**.
2. Click **Yes** to confirm removal of logo from the current report.

Numeric Options

Zero or blank adjustments in the market grid should display as

Select this option to select display for zero or blank adjustments in the market grid. Select blank, 0 (zero) or -0- (dash-zero-dash). This option is selected by default. <Blank> is the default display option.

Show plus (+) for positive adjustment values

Select this option to display positive numbers i.e., +100, +1,000. This option is deselected by default.

Signatures

Signature Colors

Signature

The designated role i.e., Appraiser, Supervisory Appraiser. Available roles are determined by the forms included in the report.

Color

Select the signature color.

Title Page Options

Photo to display

Select the photo that displays on the Title page: Title photo or Subject photo. The default selection is Subject photo.

Print Photo

Select when to print a photo on the Title page: Never, Only if exists, or Always.

Draw border

Select when to draw a border around the Title photo: Never, Only if logo exists, or Always.

Print Custom Title

Select this option and enter a custom title on the Title page. This option is deselected by default. The default title is *APPRAISAL OF...*

Print Borrower

Select this option to include the borrower name on the Title page. This option is selected by default.

Print Appraisal Value

Select this option to include the appraised value on the Title page. This option is deselected by default.

Invoice Options

Select Style

Select the Invoice style. *Classic* is the default Invoice style.

Classic

The standard invoice layout.

Window Fold

A tri-fold invoice suitable for window envelopes.

Electronic

Similar in style to the Window Fold invoice, and designed for electronic delivery.

Carry Firm Info to Send Payment To Info

Select this option to include the Firm information in the remit payment section of the Invoice. This option is selected by default.

Common Form Options

The following are common form Report Options. Options vary based on the selected form type.

Main Forms

Site

Select the site area calculation option. Calculate site area by *Square Feet* or *Acres*.

Comparable Sales Analysis

Auto-Adjustments

GLA Adjustment Factor

Enter the GLA factor representing the dollar per square foot. The program automatically calculates the difference between the GLA of the subject and the GLA of each comparable, multiplies the difference by the factor, and makes the appropriate adjustment. Select *Show* to display the GLA adjustment factor on the report.

Basement Adjustment Factor

Enter the factor representing the dollar per square foot. The program automatically calculates the difference between the total basement area of the subject and the total basement area of each comparable, multiplies the difference by the factor, and makes the appropriate adjustment.

Basement Finished Adjustment Factor

Enter the factor representing the dollar per square foot. The program automatically calculates the difference between the finished basement area of the subject and the finished basement area of each comparable, multiplies the difference by the factor, and makes the appropriate adjustment.

No Adjustment if Difference is Less Than

No adjustment is posted if the total basement area and/or the finished basement area are less than the specified value.

Site Carry

Select *Dimensions* or *Area* to carry forward the dimensions or area of the subject property to the *Site* field on the Sales Comparison Approach. Both *Dimensions* and *Area* can be selected.

Amenities Carry

Select this option to carry forward line adjustments to the *Net Adjustment (Total)* and *Adjusted Sales Price of Comparables* fields on the Sales Comparison Approach.

Age Carry

Select the age to include in the *Actual Age* field on the Sales Comparison Approach. Select *Actual*, *Actual/Effective*, *Yr. Built*, *Yr. Built/Actual*, or *Yr. Built/Effective*.

Basement Finished Carry

Select *Percentage* or *Sq.Ft.* to carry forward the percentage of the basement that is finished, or the actual square footage of the finished basement, to the *Rooms Below Grade* field on the Sales Comparison Approach. Percentage or square footage is determined based upon the values entered in *Basement Area* and *Basement Finish* in the Site section.

Additional Comparable Sales

Select an option to display the Comparable Sales 456 and 789 pages after the Comparable Sales 123 page or after the Signature page.

NOTE: After making a selection, save and close the report file. Re-open the file to view the selected changes.

Cost Approach

Depreciation

Age Life Method

When an option is selected, the physical depreciation is automatically calculated. Select **\$** to calculate the depreciation as a dollar amount. Select **%** to calculate the depreciation as a percentage. Select *No*, if you would prefer to manually enter the depreciation in the Cost Approach.

Economic Age Basis

Enter the anticipated life span of the improvements. Select **Show** to display the Economic Age Basis in the Cost Approach.

Calculate Functional After Physical

When selected, the Functional Percentage calculates based on Total Reproduction Cost New less Physical Depreciation. When disabled, Functional Depreciation equals Total Reproduction Cost New.

Calculate External After Physical

When selected, the External Percentage calculates based on Total Reproduction Cost New less Physical Depreciation. When disabled, the External Percentage equals Total Reproduction Cost New.

Carry Amenities

Select this option to carry forward the amenities selected in the Improvements section to the Cost Approach.

Research Comparable Import

When importing Comparables from Research, select an option to import the second line of Comparable addresses with city only, or with city, state and ZIP code.

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Market Data Analysis

Select *Navigate by Row* to move the cursor across the row when tabbing through the grids, or select *Navigate by Column* to move cursor down the column when tabbing through the grids.

Land Forms

Site

Select the site area calculation option. Calculate site area by *Square Feet* or *Acres*.

Sales Comparison Analysis

Gross/Net

Select *Print Gross/Net Pcnts* to display the gross and net adjustment percentages for each Comparable. This option requires the *Indicated Value* to be based on Sales Price.

Indicated Value Based on

Select *Sales Price* to calculate the net adjustments and the Indicated Value based on the sales price. Select *Price/* to calculate the net adjustments and the Indicated Value based on the price per square foot.

Adjustment Decimal Points

Select the number of decimal points (0, 1, 2, or 3) to display for the adjustments in the Market Data Analysis grid.

Research Comparable Import

When importing Comparables from Research, select an option to import the second line of Comparable addresses with city only, or with city, state and ZIP code.