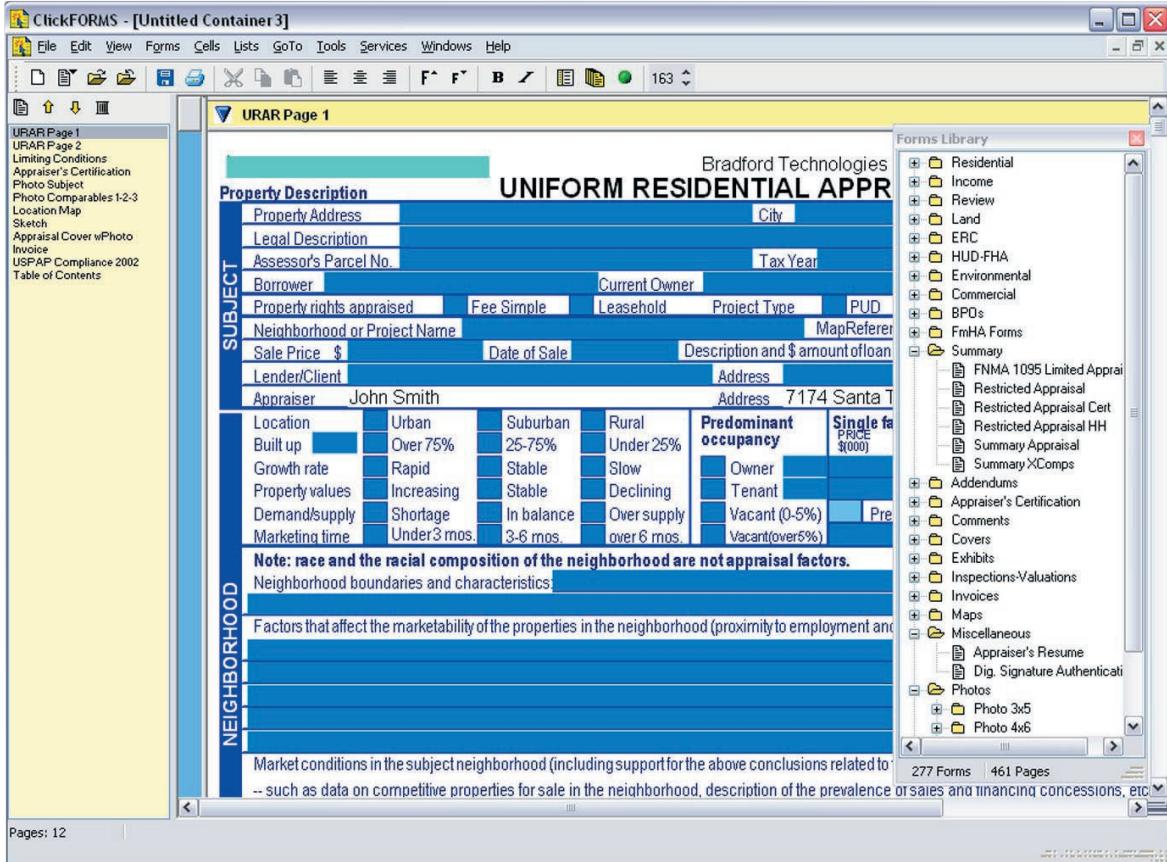


# ClickFORMS

## Quickstart Tutorial



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# A ClickFORMS Tutorial



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# Tutorial Lesson Plan

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## Getting Started with ClickFORMS

### Step 1: Introduction

Recommended documentation, displays, and startup options

### Step 2: Adding Forms

Using the Forms Library, adding, deleting and organizing forms

### Step 3: Screen Navigation

Navigating reports and utilizing collapsible pages

### Step 4: Setting Preferences

Customizing your display, application, document, tools and cell preferences

### Step 5: Cell Information

Tips for identifying, editing, and formatting cell text

### Step 6: Shortcuts

Using Auto Adjustments, Standard Responses and Standard Comments

### Step 7: Images and WinSketch

Utilizing PhotoSheet, WinSketch, maps, and inserted images

### Step 8: Digital Signatures

Creating, converting and signing your reports

### Step 9: Saving and Converting

Saving the report as a ClickFORMS file, template or PDF

### Step 10: Printing

Printer setup and printing

### Step 11: Emailing Reports

Sending reports or PDFs in email and requesting support

### Step 12: Help Menu

Accessing documentation in the ClickFORMS User Guide and Tell Me How

## How To Contact Bradford Technologies

Office hours, telephone numbers, email, web site, mailing addresses and keyboard shortcuts

## Introduction

### Getting Started

We know you don't have a lot of time, so we have written this booklet to help you understand the highlights of the ClickFORMS software as quickly as possible. Follow this outline and you will be using ClickForms for processing appraisals in a twenty minutes or less.

First, install the software.

The first thing you want to do is gain an overview of what the program can do for you. Install the software and browse the User Guide and Tell Me How section. You can launch them from the Help Menu after the software is installed and open.

Second, go through the tutorial. (Approximately 20 minutes)

The tutorial will take you through the highlights of the program from "Starting a New Report" to "Getting Help". After reading this Tutorial, you will know how to produce a complete appraisal report.

Third, familiarize yourself with your Operating System.

ClickFORMS is designed for Windows XP. Although the software will function on all Microsoft Windows operating systems going back to Windows '95, all of the screenshots in this documentation were captured under an XP environment. The following is the minimum system requirements for running the ClickFORMS software:

- Platform: Windows 95
- CPU: 200 MHz Pentium® or faster
- RAM: 64MB RAM
- Media: 2x CD-ROM drive or faster
- Video: 800 x 600 display, High Color 16-Bit
- Hard Drive: 100MB of free hard disk space
- Other: Microsoft Internet Explorer® 5.0 or higher



Thank you for taking the time to evaluate ClickFORMS software.

- Bradford Technologies

## STEP 1: Starting a New Report

### 1. Start the Application

Start the application by clicking on the ClickFORMS program shortcut icon located on your desktop.



### 2. Select the User License

If you already have a user license, select your license file. Otherwise, choose New. A screen will come up asking you to type in your name, address, and company name. After entering your name the way you wish to sign your reports, click OK. The Evaluation Welcome screen will be displayed.



### 3. Initial View

- A sample form opens in the Workspace:

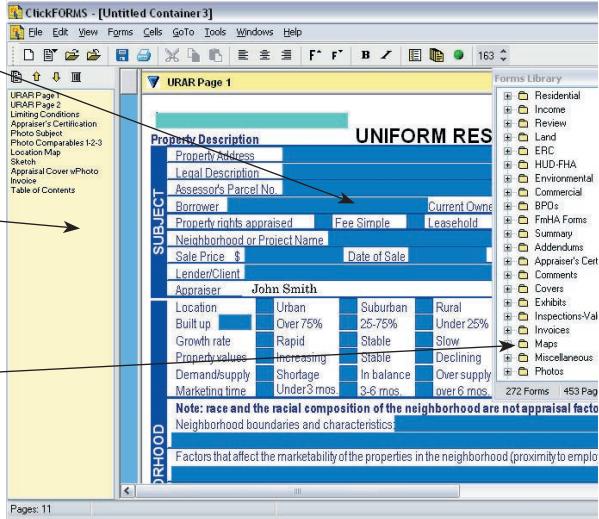
By default, this will be the sample URAR report template file which is included with your software.

- The Forms Manager is Visible:

The Forms Manager is on the left-hand side of your Workspace. It contains the name of all forms in the active report.

- The Forms Library is Displayed:

The Forms Library is the window on the right-hand side of the desktop. This contains all the forms that you will need to complete any type of report.

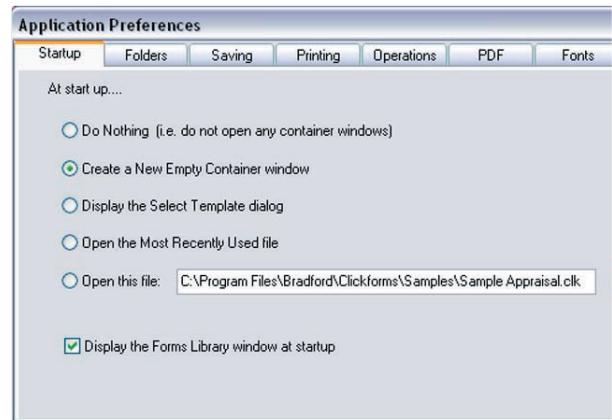


### 4. Change Your Startup Options

Click on the Edit Menu > Preferences > Application  
Select a preferred option from the Startup tab page

#### Startup Options

- Do Nothing (i.e., do not open any container windows)
- Create a New Empty Container window
- Display the Select Template dialog
- Open the Most Recently Used file
- Open this file: C:\ ... Sample URAR.clk



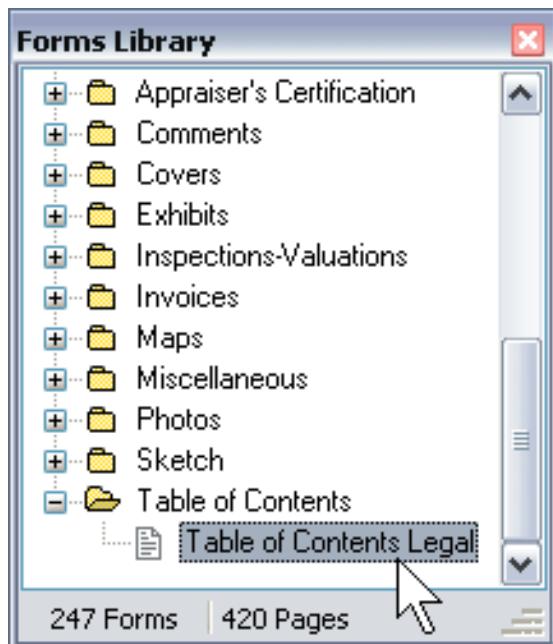
## STEP 2: Adding Forms

### The Forms Library

The Forms Library is defined as such: A Library of approximately 250 reusable forms that are compliant with national Appraisal Industry standards.

Click the plus sign beside a Category Folder to view the forms inside. Click on the minus sign to close it.

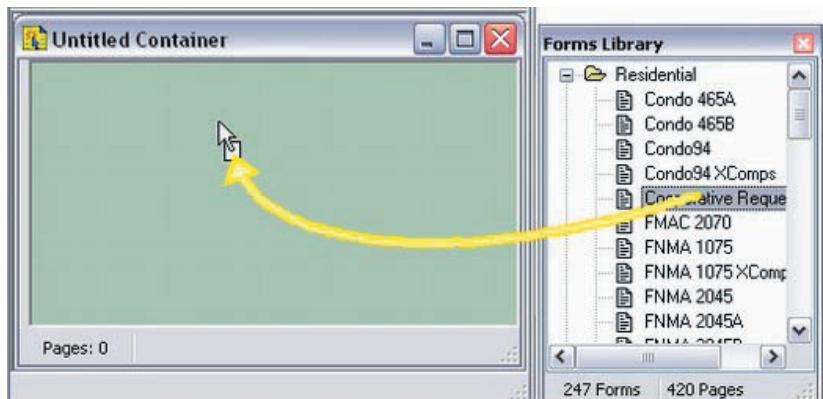
The Forms Library can be hidden or displayed instantly by clicking on the Forms Library Button in the Toolbar. Press the [Ctrl+L] keys to show it, or to hide it. Click on the Forms Menu > View/Hide Forms Library. Drag the Forms Library to move it anywhere on your desktop, or click and drag the handle in the lower right corner to resize it.



### Adding Forms

#### Method A:

- Open a new report by choosing New, Empty Container from the File Menu.
- Click on and hold the desired form from the Forms Library. Try the URAR
- Drag the icon over to your container and release it.
- Repeat as needed, until all of the required forms have been added to the container.



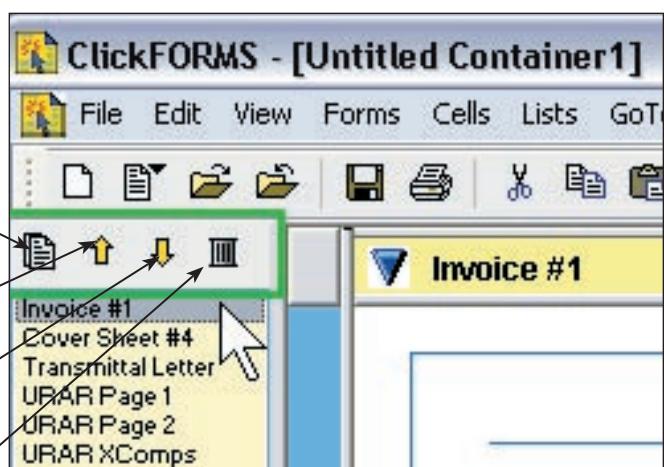
Method B: Double-Click on a Form to add it.

### The Forms Manager

The Forms Library can be quickly and easily hidden or displayed using the Forms Library [Ctrl+L] button.

Select a form in your report, and click the up arrow button to move it to the front of the report.

Select a form in your report, and click the Down Arrow button to move it to the back of the report.



## STEP 3: Screen Navigation

Below is a picture of the ClickFORMS screen. There are many ways to navigate within a report. On this page we've documented both what you'll see, and a few of the ways to move around easily.

### Page Title Bars

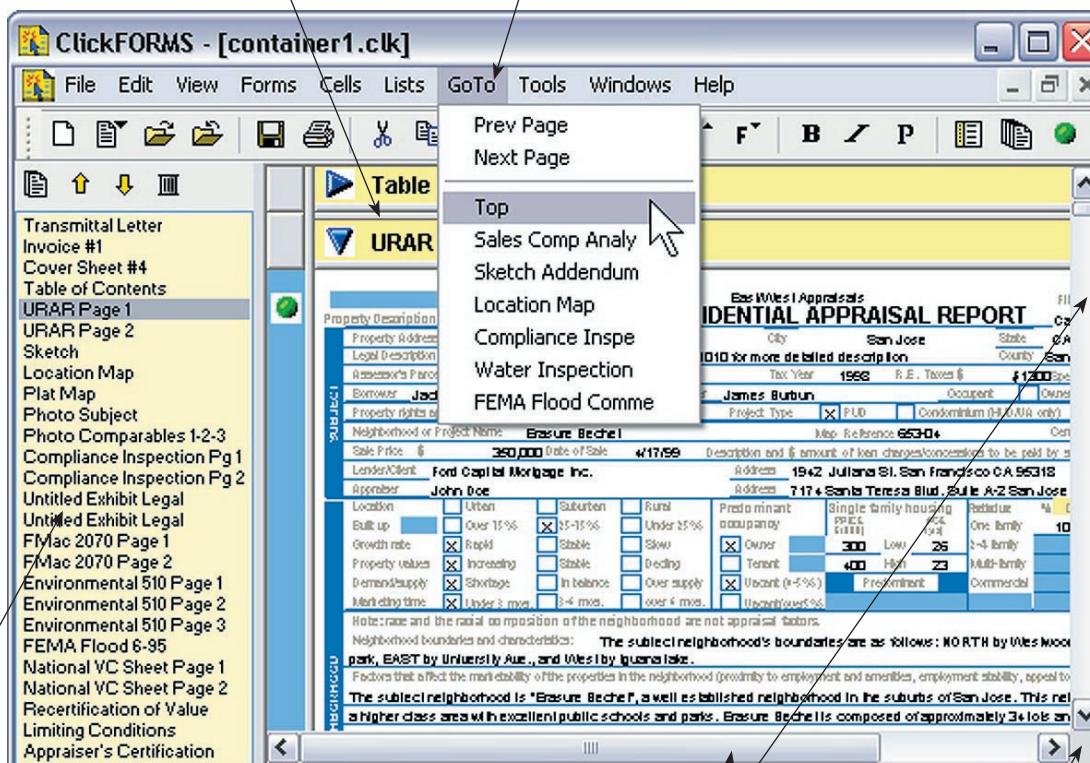
Click on the arrows in the Page Title Bars to collapse or expand individual pages or collapse all from the View Menu selection.

### GoTo menu

Click on the GoTo menu to browse to the previous or next page, or jump to any bookmark that you've set.

### Move Field to Field

Press the Tab or Enter key to move to the next field. Press [Shift+Tab] to return to the previous field.

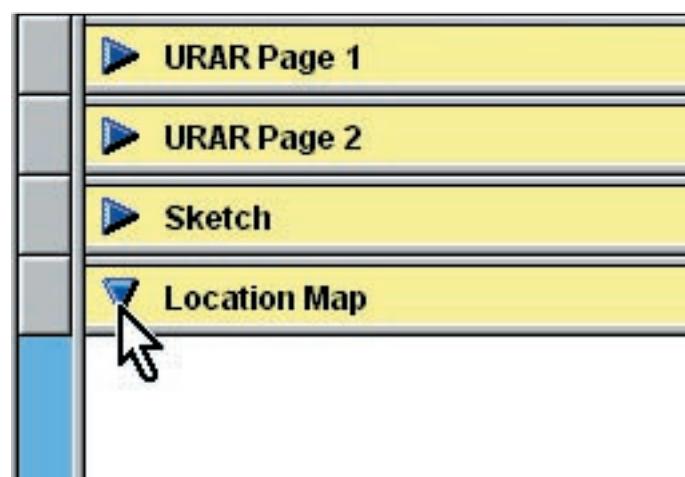


### Forms Manager

Click on any page in the Forms Manager to display that page in your Workspace.

### Collapsible Pages

- Page Title Bars are displayed at the top of each page in your report.
- To expand any page in your report, click on the blue arrow. When the arrow is pointing down, the page is expanded
- Click on the arrow a second time to collapse the page. When the arrow is pointing towards the right, the page is collapsed. To Collapse all pages, choose View, Collapse All Pages, or [Shift+F3]

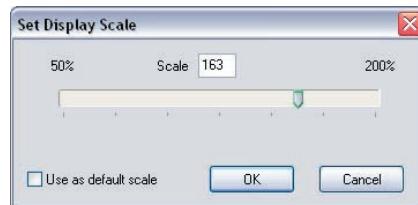


## STEP 4: Setting Preferences

ClickFORMS is the first appraisal software that can be totally configured to meet your needs. This chapter will explore customizing your preferences to meet and enhance your needs.

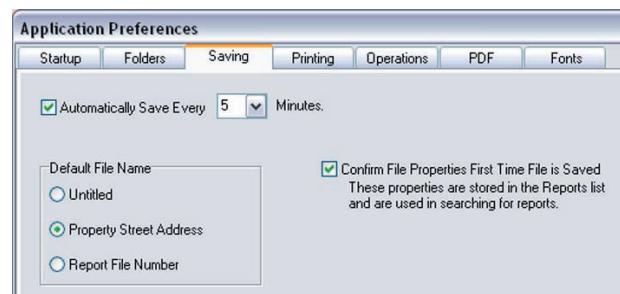
### 1. Set Display Preferences

Once the report is open, go to the View menu and select Zoom. You can easily set the display scale with the slider. Using the View menu, you can also change your screen display mode from Full Screen to Normal with a single click.



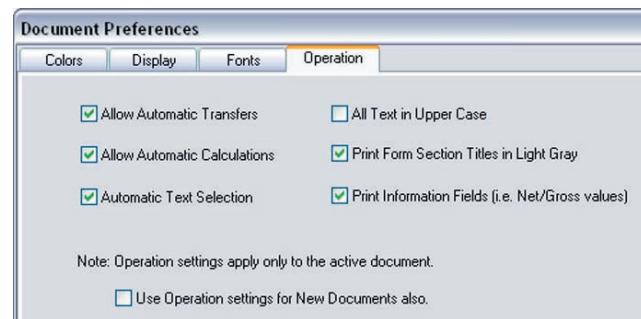
### 2. Application Preferences

You've already seen how to set up Startup Options from the Application Preferences dialog. You can also set Directories, Auto-Save and PDF options.



### 3. Document Preferences

In this dialog, you can change the report cell Colors, Display settings and select alternative default Fonts for your report text. You can also control global Operations for automated transfers, calculations and printing from this dialog.

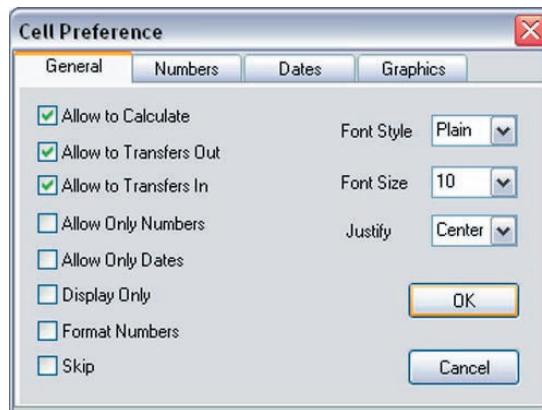


### 4. Tools Preferences

There are three types of tools that can be configured from this dialog. There are Built-In Tools, such as PhotoSheet and WinSketch, Plug-In Tools, such as Geolocator and Street Atlas, and User Specified Tools, such as Excel and Calculator.

**Cell Preferences:** The Cell Preferences dialog can be accessed from the Cells menu. Preferences can be set for:

- General Preferences: This is where you can change calculation, display and transfer settings for each cell.
- Numbers: You can round off any number automatically, set decimals or commas and display zeros, if necessary.
- Dates: Display your dates in any format.
- Graphics: Control the way your graphics are displayed, framed and fit to the cell.



## STEP 5: Data Entry

### Cell Types

When entering data, there will be several different type of cells:

- General Cells:** This type of data only needs to be entered once. If you type in an address, for example, the same address will be duplicated in every form in your report where the same data is required.
- Check Boxes:** One of the easiest ways to make a selection is to click on a check box to select it.
- Number Cells:** Measurements and dollar value amounts are contained within these cells.
- Response Cells:** These cells hold short canned responses such as “one”, “two” or “three”.
- Comment Cells:** The majority of appraisal typing time is spent within these detailed comments. ClickFORMS can keep an unlimited numbers of these comments, to save time and minimize your work.

The screenshot shows a detailed appraisal report form with several data entry fields. At the top, there's a header for 'UNIFORM RESIDENTIAL APPRAISAL REPORT' with file information like 'File No. 10042002' and 'Case No. 2002-227'. Below the header, there are sections for 'Property Description' (Address: 1005 The Alameda, Legal Description: 1A 2B - Erasure Bechet refer to Act#1010 for more detailed description), 'Assessor's Parcel' (Parcel ID: 9782), 'Owner' (Name: John Jones, Current Owner: James Burbun), and 'Subject' (Name: Erasure Bechet). There are also sections for 'Neighborhood' (Location: Urban, Built up: Over 75%, Growth rate: Rapid, etc.), 'PUD' (Project Under Development), and 'Dimensions' (Site area: See attached subdivision plat, etc.). The form is filled with various data entries, including property values, market conditions, and neighborhood descriptions.

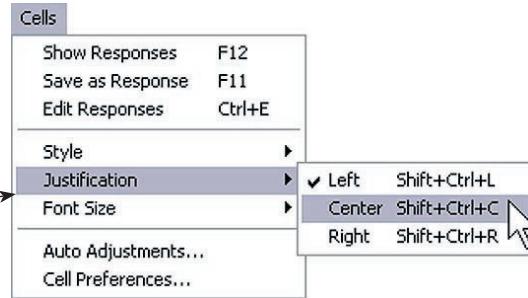
### Formatting Text Characteristics

You can set the particular display, behavior or formatting of individual data fields.

#### Style, Justification and Font Size

Use the commands in the center of the Cell menu to set any cell's style, justification and font size.

Shortcut: You can click on the corresponding Toolbar icons to set the active cell's style, font size and justification.



### Editing Cell Text

First select the text you'd like to edit by highlighting it, and then you can choose copy from the Edit Menu.

Shortcut: To eliminate one mouse-click just use the copy button from the Toolbar Edit Console.



## STEP 6: Shortcuts

ClickFORMS has many time saving features that allows you to create shortcuts with your data entry.

### 1. Auto Adjustments

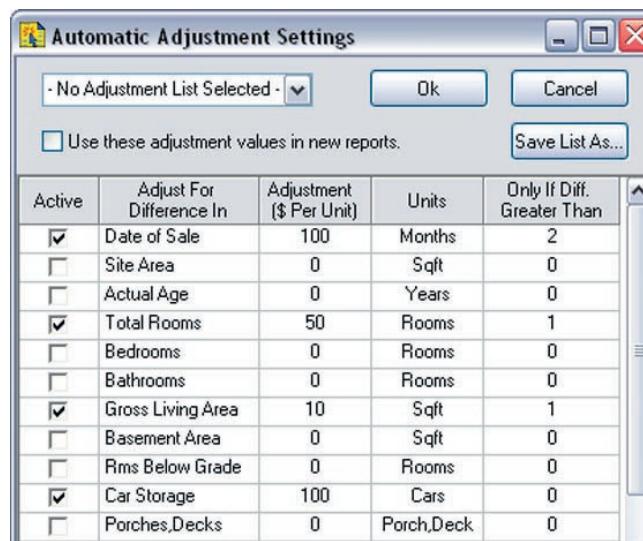
To display this dialog, go to the Cells Menu, and choose Auto Adjustments.

#### One Time Adjustment

Complete the Automatic Adjustment Settings dialog and click on the OK button.

#### Permanent Adjustment

Complete the Automatic Adjustment Settings dialog, check “Use these adjustment values in new reports”, and click on “Save List As”, then type a name in the box. To finish, click on the OK button.



### 2. Standard Responses

Drop down menus enable you to select canned responses.

#### Automatically Display Responses

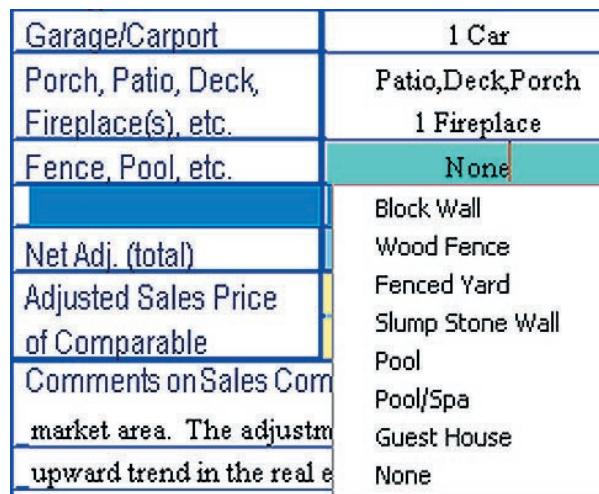
Enabling the Auto Display Responses will provide a preset list of responses that appear as you tab through fields.

#### Save Text as a Standard Response

Press [Shift+F2] or select Add Response from the Cells menu. To display your responses, choose F2.

#### Editing Standard Responses

Select Edit Responses from the Cells menu or simply press the [Ctrl+E] keys.



### 3. Standard Comments

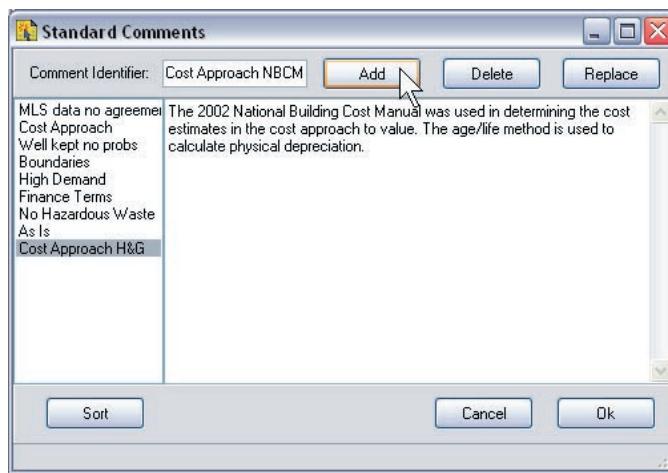
Select appropriate comments to fill comment cells and complete any addendum instantly.

#### Enter and Edit Your Comments

Type your comments into a comment field and press [Shift+F2] key to save them. Press the [Ctrl+E] to edit them or add more.

#### Adjust The Text Size

After selecting the standard comment, click on Decrease/Increase Font Size icons to shrink or grown text to fit the cell.



## STEP 7: Images and WinSketch

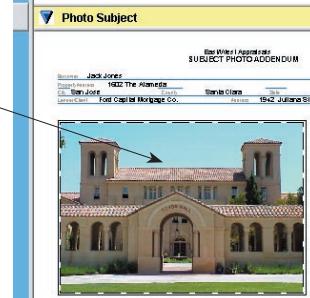
Adding photos, sketches, maps and scanned documents is now faster and easier to perform.

### 1. Photos

Add any number of photos of any size to your Photo Addendum using the PhotoSheet tool.



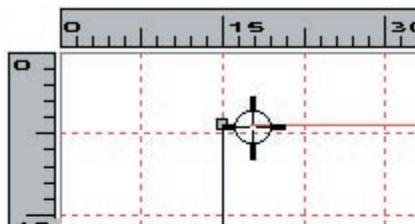
PhotoSheet



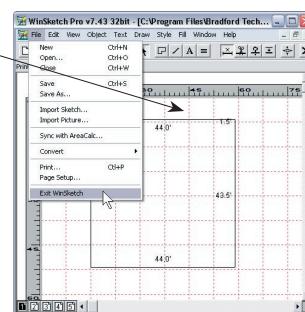
Drag and drop a photo directly into the report.

### 2. Sketches

ClickFORMS has a customized version of WinSketch built-in to the software.



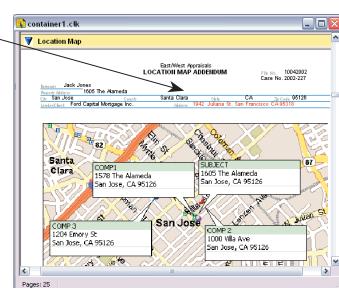
WinSketch



Sketch any structure and insert it.

### 3. Maps

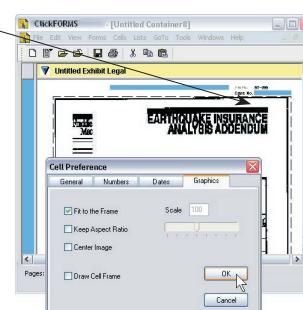
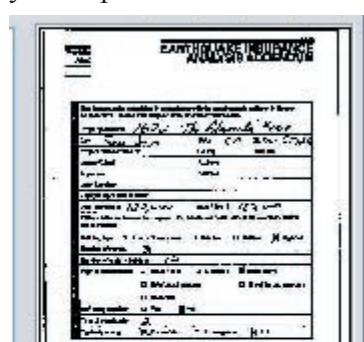
Comparables Maps can be generated automatically in seconds with Geolocator® or Online Maps.



Design and scale your comparable maps.

### 4. Scanned Documents

Scan a letter, legal or state seal and copy it right into your report.



Insert and format any scan.

## STEP 8: Digital Signatures

ClickFORMS enables you to digitally sign any appraisal report, quickly and easily.

### Creating a Digital Signature

Before you can sign the report, you need an image of your signature. Bradford Technologies provides a signature scanning service, or you may create your own signature image file if you have a scanner. If you want a color signature, scan it in color mode. It will print out in the same color scanned. When you create the file, crop the area around the signature to insure there is a minimal amount of white space around it. Then save the signature as a picture file in My Pictures folder.

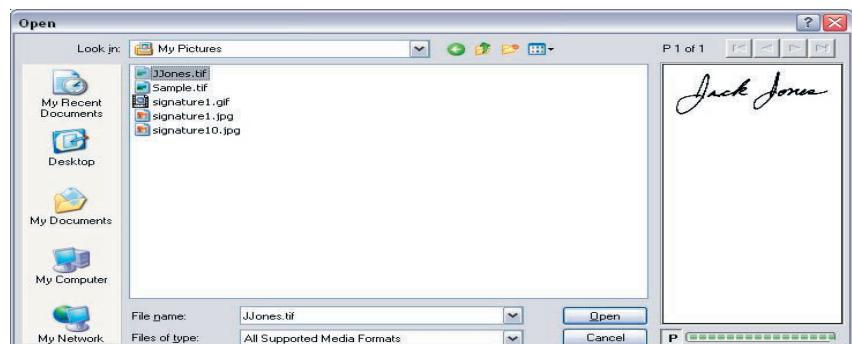
The recommended formats are:

.jpg .tif .gif .bmp



### Signature Conversion

Users of our 16-bit software can easily convert their 16-bit license and signature files to ClickFORMS 32-bit format with our free converter tool. If your ToolBox Signature was stored in the *C:\CFORMS\Signatur* folder when you run the Converter it will automatically convert a copy of your license and your signature. The option to convert, followed by the 16-bit converter dialog box with options for converting will appear the first time you install ClickFORMS.



### Setup a Digital Signature

To digitally sign the report, click on Tools, and choose Signature. You will need to setup your signature before you can sign the report. To set-up your signature select Setup, and then choose Load. Browse to the location where you saved your signature and select your file. Click Open. On the left is a small arrow pointer. The arrow (Zoomer) will allow you to resize your signature correctly. Place your Signature on the signature line and click OK.

Finally, choose Affix. Your digital signature will be instantly affixed to the appraisal report file.



## STEP 9: Saving and Converting

After creating or editing a report, you can save it to any media, network server or hard disk drive.

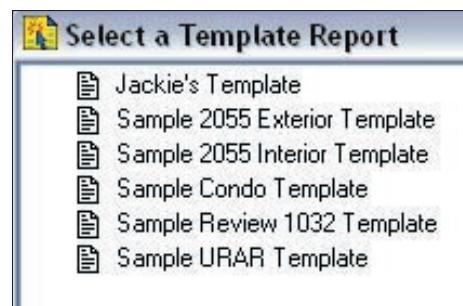
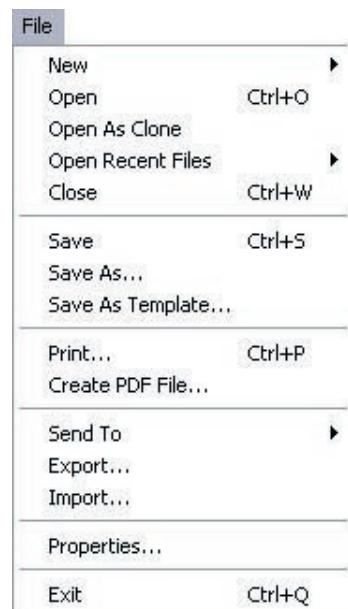
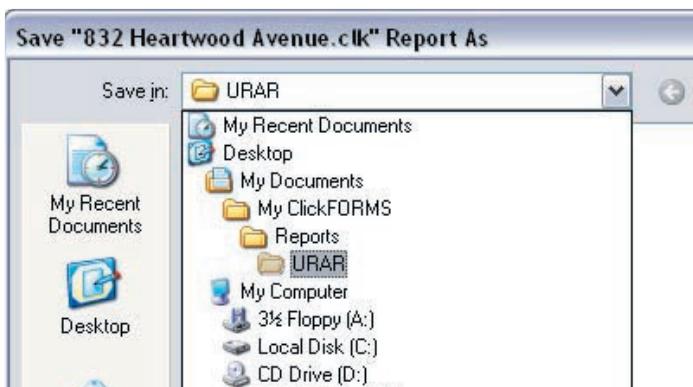
To Save a Report, choose one of the following save options from the ClickFORMS File menu:

### Save

If you have an existing report file and wish to save changes to it, select the Save function or press the [Ctrl+S] keys. If you do not have an existing file, you will first be asked to create and name the file.

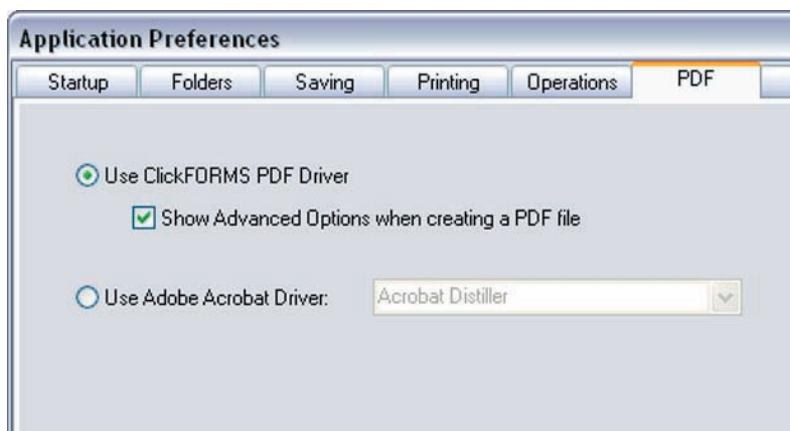
### Save As

This is a really convenient command that empowers the appraiser to back up multiple copies of the same report. This report can be saved to various locations on your network, including digital archives, file servers or colleagues' machines. You can use Save As to transfer the file to any laptop, external hard-drive or portable storage device.



### Save As Template

Save As Template is a great way for creating starter reports in areas you appraise. This function is similar to Save As, except that the file created cannot be accidentally overwritten. First create a custom template, with pages and data you wish to have in your reports. Then choose Save As Template, and type in the template name. If you are updating the template name, choose Save as Template, and then click on the template name and click Save. Choose "yes" to overwrite.



### Save As PDF

ClickFORMS now provides a built-in PDF Driver that allows for Advanced Options such as additional security settings and password protection. To create a PDF, simply go to File, Create PDF, and the ClickFORMS PDF driver will convert your report quickly and easily. These files are great for EDI and can be viewed and printed by the Adobe Acrobat reader.

## STEP 10: Printing

ClickFORMS software supports dual printers for printing color and black/white forms simultaneously. You have complete control over which pages to print and the number of copies to print of each page.



### To Print

Click on the File menu and select Print. The Print dialog shown below is displayed. The pages will display in the order your report appeared from the ClickFORMS report. Click Print.

- **Setup Printer**

Ensure the correct printer and printer properties are set. To change the printer, or check the properties, click on setup. A second window will come up with a drop down listing of printers to select, and a Properties button. Here you can change settings such as paper size, graphics, and printers. After making changes, click OK to return to the Print box.

- **Set Pages to Print**

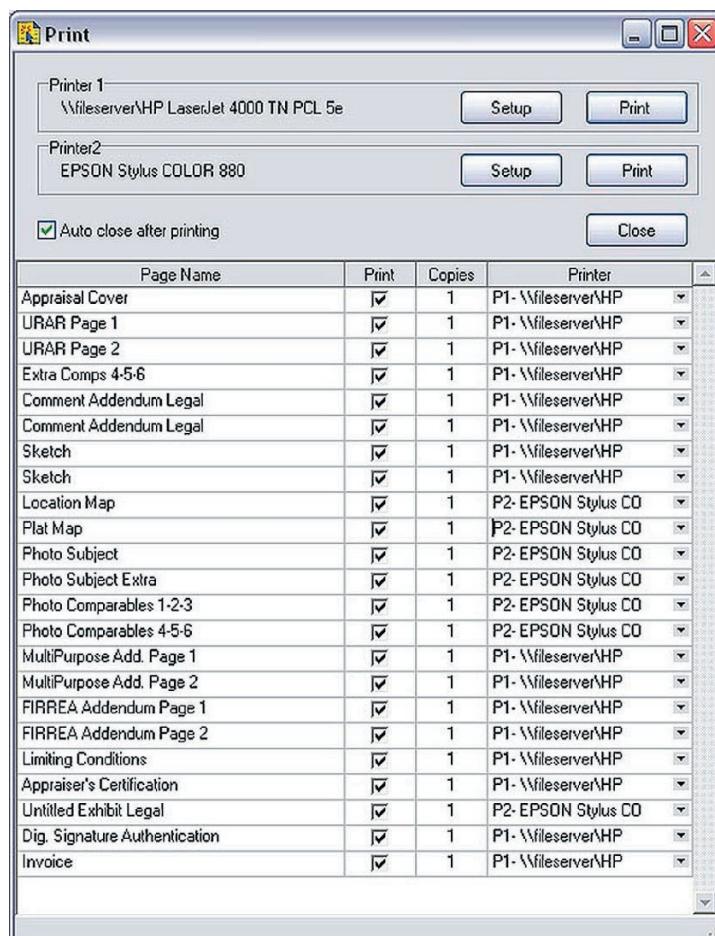
Under the Print column select the pages you want printed by inserting a check mark in their respective boxes.

- **Set Number of Copies to Print**

Under the Copies column, type in the number of copies you would like to print of each page. You can use [Shift+Ctrl] and click on a page with the mouse to unselect all.

- **Set Printer to Use**

Click on the drop-down arrow next to the printer name to choose the printer for an individual page. To change printer for more than one page at a time, hold down the Shift key and click on the printer name with the mouse.

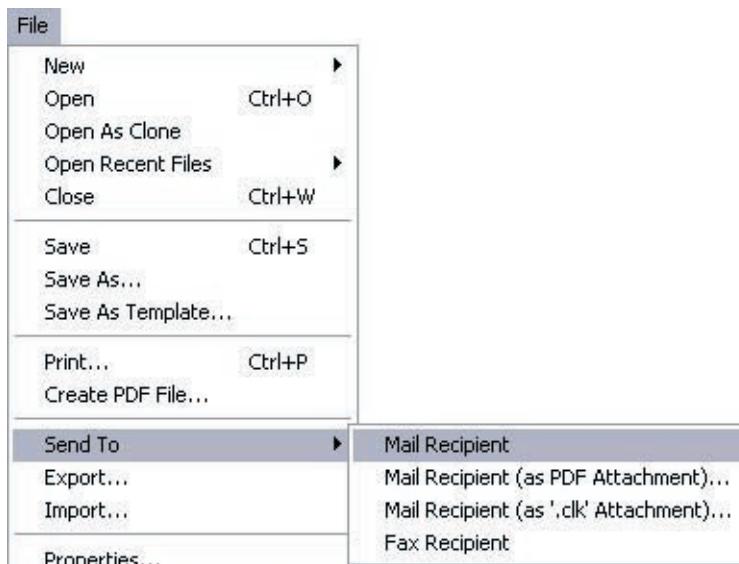


## STEP 11: Emailing Reports

ClickFORMS has the built-in ability to email reports directly as a PDF or as the attached report. This will eliminate the need to search for attachments on your computer, and enhance your productivity.

Send To Mail Recipient from the File Menu

- To email directly from ClickFORMS, go to File and choose Send To > Mail Recipient.
- To email PDF attachments directly, choose Send To > Mail Recipient (as PDF Attachment). Your report will convert to PDF automatically.
- Choosing Send To > Mail Recipient (as '.clk' Attachment). This will bring up a blank email with the original report already attached. This handy feature is especially useful when working with other colleagues in ClickForms.



### Help

[Quickstart Tutorial...](#)

[Reference Manuals](#)

[Tell Me How...](#)

[Request Assistance...](#)

[Send Suggestion...](#)

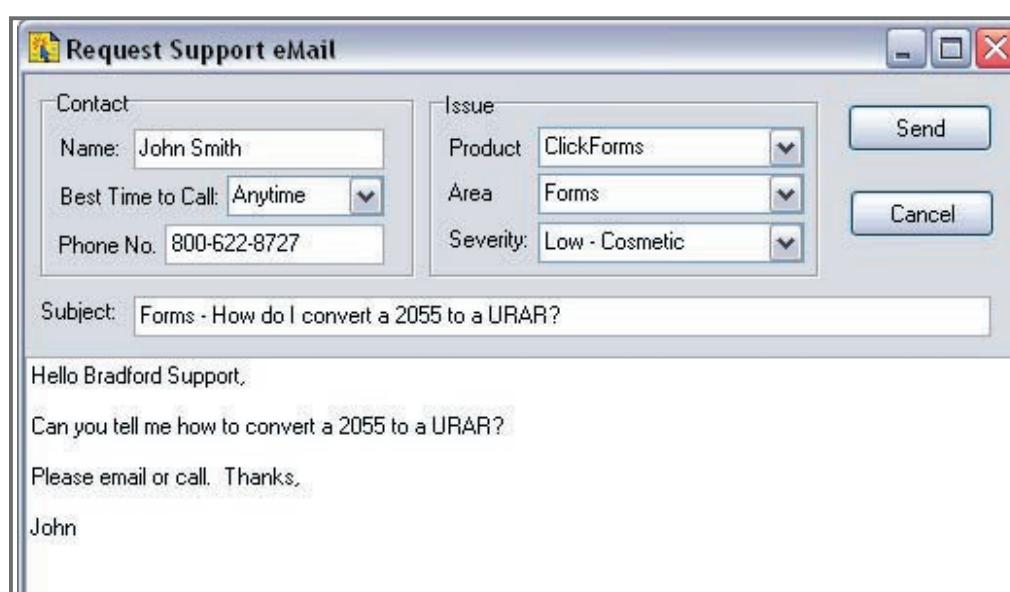
[Registration](#)

[About ClickFORMS](#)

Send Email From The Help Menu

Now you can send our Software Programmers your comments and ideas for features and improvements in an instant. Just click on the Help Menu and choose Send Suggestion. You can also contact Technical Support by taking advantage of this easy-to-use email feature. Choose Request Assistance and fill out the information provided in order to get the fastest reply.

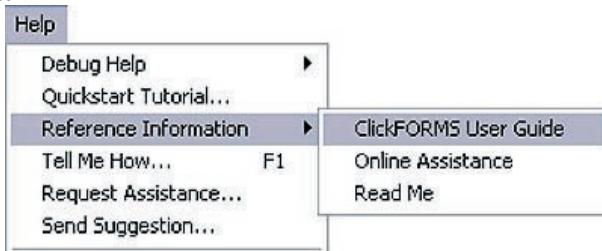
Built-in Email  
If you have an Internet Service Provider (ISP) account and an email program such as Microsoft Outlook, Outlook Express or Eudora, you can send an email directly from ClickFORMS to our Technical Support Team in seconds.



## STEP 12: Help Menu

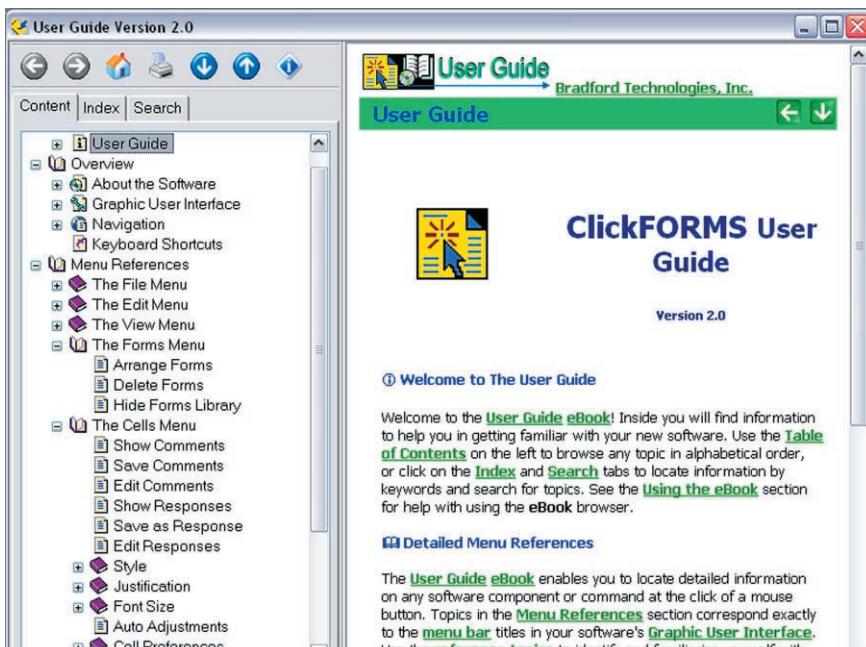
### Documentation

Every ClickFORMS installation downloaded with help files includes two comprehensive suites of technical documentation readily available whenever you use the software. You can access these resources easily from the Help Menu.



- **User Guide**

The ClickFORMS User Guide is a multimedia eBook organized into topics that are arranged identically to the items in your Menu bar. A wealth of reference information is contained in this eBook.



- **Tell Me How**

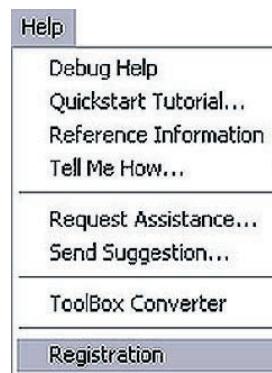
The ClickFORMS Tell Me How Tutorial Suite provides answers to all your technical questions.

- **Online Help**

Online Help is available on the Bradford Technologies web site.

- **Register Your Software**

Register your software by clicking on the Registration item in the Help Menu. You can also call Customer Support @ (408) 360-8520 Ext. 232 to register.



# How To Contact Bradford Technologies

Hours: Monday-Friday 8 a.m. to 5 p.m. (Pacific Standard Time)

Customer Service: (408) 360-8520  
Sales Information: (800) 622-8727  
Electronic FAX: (408) 360-8529

E-Mail & Web Site: Electronic Mail: sales@bradfordsoftware.com  
support@bradfordsoftware.com  
suggestions@bradfordsoftware.com  
comments@bradfordsoftware.com  
forms@bradfordsoftware.com

World Wide Web: <http://www.bradfordsoftware.com>

Mailing Address: BRADFORD TECHNOLOGIES  
7174 Santa Teresa Blvd., Suite A2  
San Jose, California 95139

Toolbox	Keyboard Shortcuts	ClickFORMS
Shortcut Keys	Command	Shortcut Keys
Ctrl + N	Template List	Ctrl + N
N/A	Empty Container	Ctrl + Alt + N
Ctrl + O	Open	Ctrl + O
Ctrl + W	Close	Ctrl + W
Ctrl + S	Save	Ctrl + S
Ctrl + P	Print	Ctrl + P
Ctrl + Q	Exit	Ctrl + Q
Alt + Backspace	Undo	Ctrl + Z
Ctrl + X	Cut	Ctrl + X
Ctrl + C	Copy	Ctrl + C
Ctrl + V	Paste	Ctrl + V
Del	Clear	Del
Ctrl + A	Select All	Ctrl + A
N/A	Find and Replace	Ctrl + F
N/A	Expand All Pages	F3
N/A	Collapse All Pages	Shift + F3
N/A	Forms Library	Ctrl + L
F2	Show Responses	F2
Ctrl + F2	Save Responses	Shift + F2
Shift + F2	Edit Responses	Ctrl + E
Ctrl + B	Set Bold Style Font - On/Off	Ctrl + B
Ctrl + I	Set Italic Style Font - On/Off	Ctrl + I
N/A	Left Align Text	Ctrl + Alt + L
N/A	Center Align Text	Ctrl + Alt + C
N/A	Right Align Text	Ctrl + Alt + R
N/A	Decrease Font Size	Shift + [
N/A	Increase Font Size	Ctrl + ]
Tab	Move Cursor From Cell to Cell	Tab
Arrow Key	Move Cursor In Direction of Arrow	Ctrl + Arrow Key
N/A	Auto-Responses On/Off Toggle	Shift + Ctrl + R
N/A	Forms Manager Show/Hide Toggle	F4
N/A	Report Spell Checker	F7
N/A	Launch Tell Me How	F1



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