

# ClickFORMS





"If simplicity is the key to productivity, it doesn't get any better than this."

---

*published by Bradford Technologies*

*This document has been authored for use as a companion to ClickFORMS. The information and instructions contained here can also be accessed via the application "Help" menu.*

*Bradford Technologies provides updates to this manual on the downloads section of our web site. For questions regarding documentation, please use the contact form on <http://www.atbx.com>.*

*Thank you for choosing The Appraiser's ToolBox XP.*

Bradford Technologies

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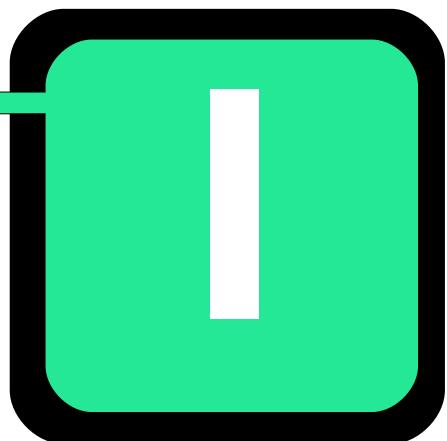
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# Part



# 1 Introduction

## 1.1 User Guide



# ClickFORMS User Guide

Version 2.2.3

### Welcome to The User Guide

Welcome to the [User Guide eBook](#)! Inside you will find information to help you in getting familiar with your new software. Use the [Table of Contents](#) on the left to browse any topic in alphabetical order, or click on the [Index](#) and [Search](#) tabs to locate information by keywords and search for topics. See the [Using the eBook](#) section for help with using the eBook browser.

### Detailed Menu References

The [User Guide eBook](#) enables you to locate detailed information on any software component or command at the click of a mouse button. Topics in the [Menu References](#) section correspond exactly to the [menu bar](#) titles in your software's [Graphic User Interface](#). Use the [reference topics](#) to identify and familiarize yourself with each component.

### Designed For Microsoft® Windows XP

Screen shots in this document were captured on the [Microsoft Windows XP](#) operating system. If you have not yet migrated to this OS, our software interface and dialogs may look different on your version of the Windows environment, although the associated commands and operations will be identical.

### Commitment to Quality

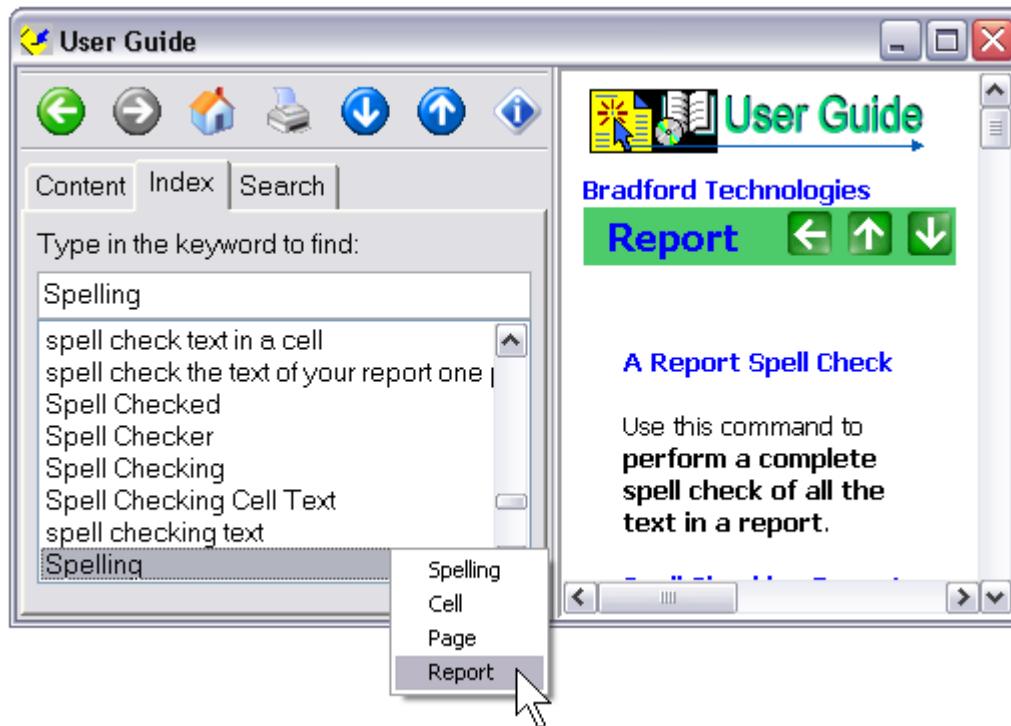
Click on [this link](#) to send feedback to Bradford Technologies Inc. and assist us in tailoring the User Guide eBook to better meet your needs. Visit the [Bradford Technologies Inc.](#) web site to download future software updates and patches. For [Bradford Technologies Inc.](#) contact information, see the [Contact](#) section of this guide.

Bradford Technologies Inc.

### 1.1.1 Using the eBook

#### The User Guide eBook

- This section provides assistance for the User Guide eBook that is included with your software.



The User Guide eBook

#### Help For eBook Users

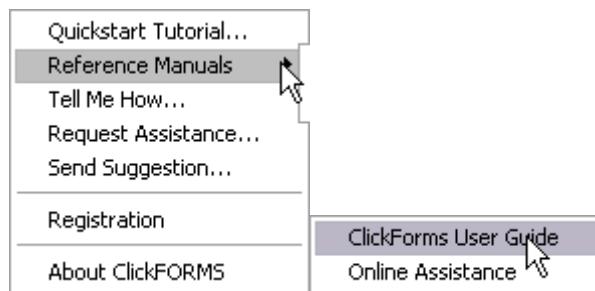
- The User Guide is displayed on your computer in eBook format. Reading these pages will familiarize you with the eBook, and provide tips for getting the best experience from your software User Guide in electronic format. There are six topics in this section:

- [Accessing the eBook](#)
- [eBook Navigation](#)
- [Viewing Topics](#)
- [Optimizing Visibility](#)
- [The Index Feature](#)
- [The Search Feature](#)

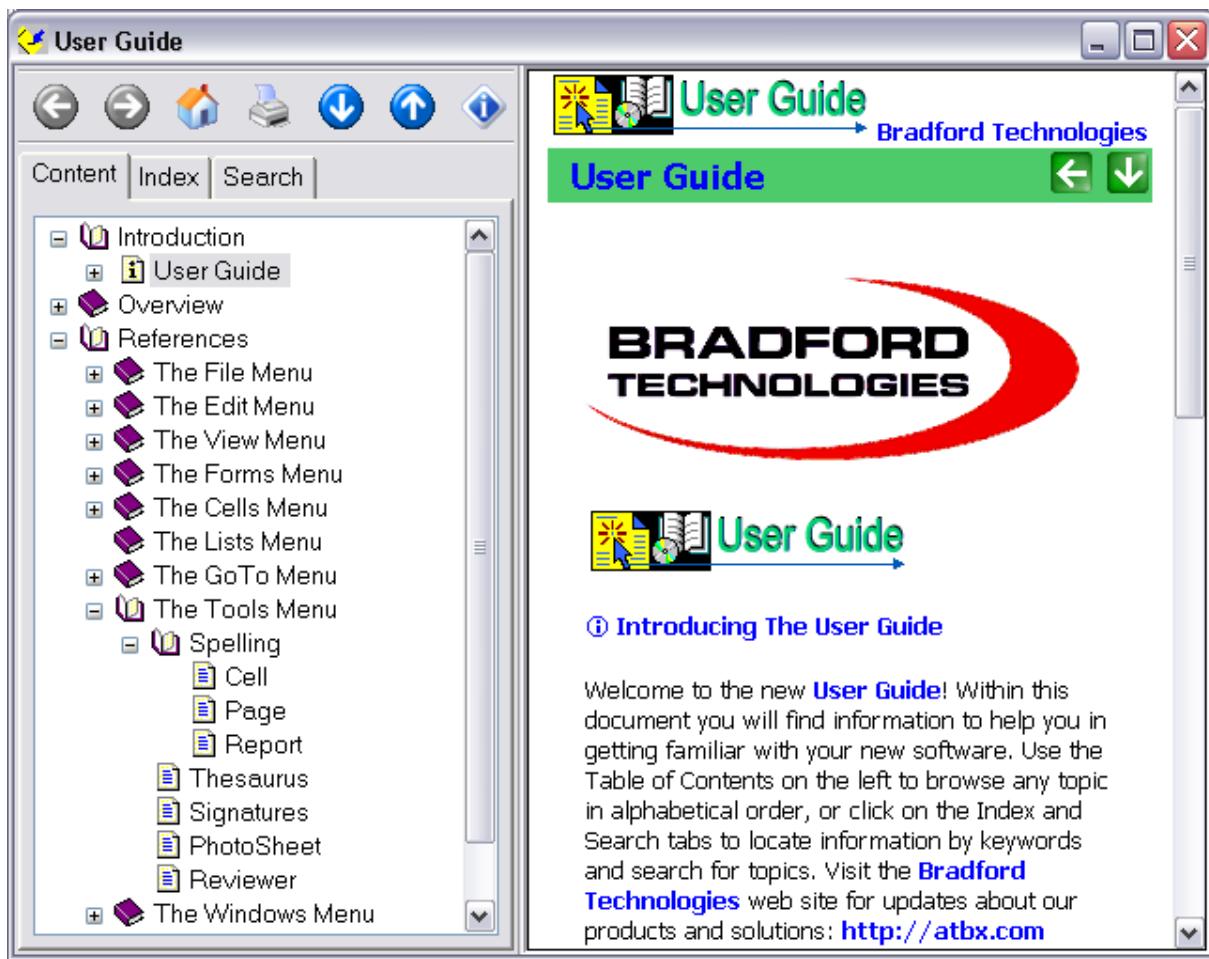
### 1.1.1.1 Accessing the eBook

#### Using the eBook Part I: Accessing the eBook

- ▶ To Launch the User Guide:



- ▶ Click on the Help menu title in the menu bar.
- ▶ Move your cursor down to the Reference Manuals item.
- ▶ Click on the User Guide... selection.



The User Guide eBook

- The User Guide will launch into view in a full-screen eBook Browser window, and the Home Topic (Introduction > User Guide) will be displayed by default.

### 1.1.1.2 eBook Navigation

#### Using the eBook Part II: eBook Navigation

Here are some tips for easy navigation:

- Use the Scroll Bars in the Navigation Pane and the Topic Pane to move pages vertically and horizontally.
- Links to related topics and Internet sites will appear in **bold underlined green text**.
- Keywords will appear in bold black text.
- The Help Toolbar contains buttons for navigation, printing and launching an information window.
- Use the Topic Header Arrows (☞), in the top right corner of the Topic Pane, to view topics sequentially.
- Click on a title in the Navigation Pane to view the associated topic in the Topic Pane (see [Viewing Topics](#) for more detail).



eBook Navigation Reference

- The above diagram is a reference for eBook navigation controls.

#### Navigation Controls

The eBook navigation control index is below. Click on a name to view the description:

**①** Jump to Previous or Next Topic in History: Use these buttons to browse through the order in which you viewed User Guide pages.

**②** Jump to Default Topic: Clicking on this button will jump you to the default topic, which is on the first page of the eBook.

**③** Print Topic: Send the topic being viewed to your printer.

► To print the entire manual, please use the PDF version of the [User Guide](#).

**④** Jump to Previous or Next Topic in eBook: These buttons are for viewing topics in

the order that they appear in Help.



About User Guide: Clicking here will open a temporary window with the version number of your User Guide eBook and Bradford Technologies Inc. contact information.



Content Tab Page: This Navigation Pane tab page can be used for selecting topics for viewing according to their title.



Index Tab Page: Contains a list of all keywords in the [User Guide](#). Enter a keyword to view and browse instances of the word.



Search Tab Page: Contains a search engine. Enter a keyword to view and browse topics where the word appears.

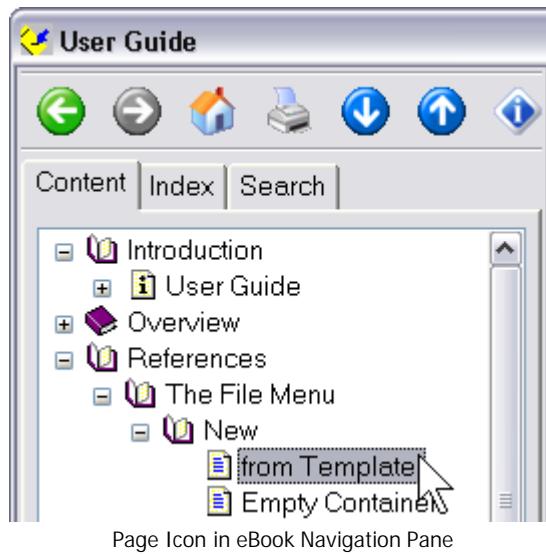


Right click on the topic pane for a drop-down navigation/command menu.

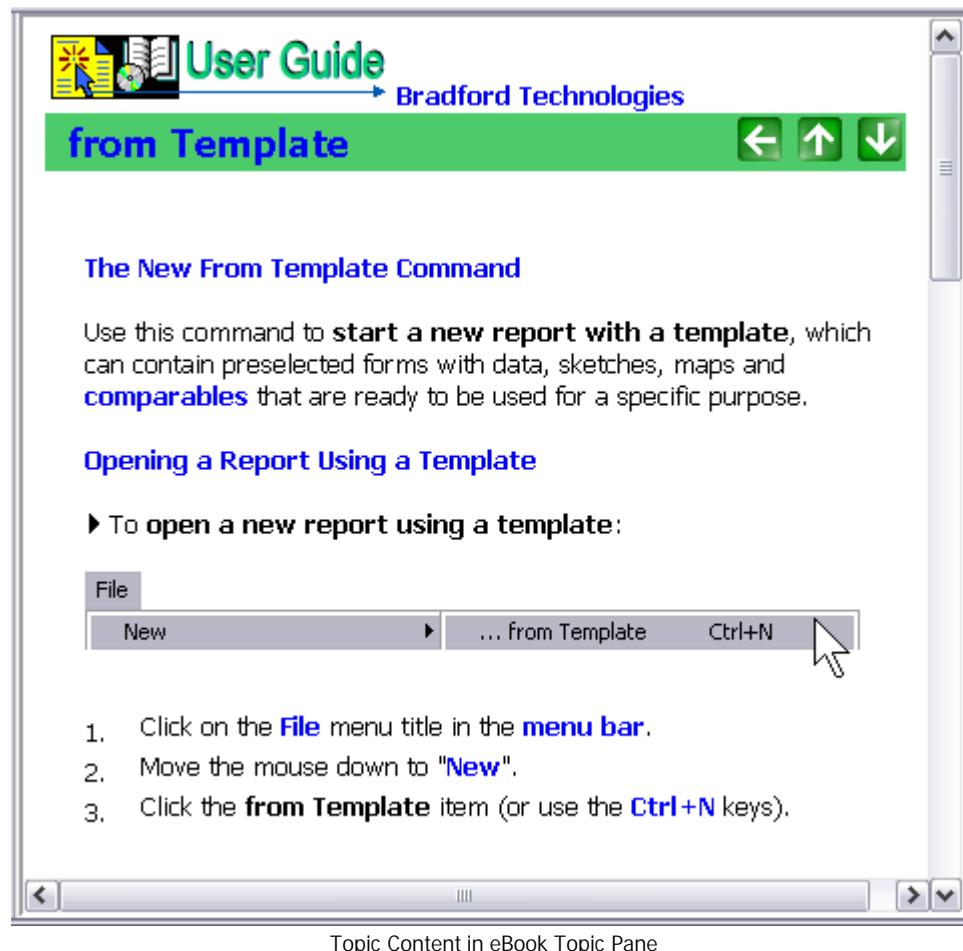
### 1.1.1.3 Viewing Topics

#### Using the eBook Part III: Viewing Topics

- ▶ To view a topic:



- ▶ Click on a closed book Topic Icon in the Navigation Pane to open a parent topic.
- ▶ Click on the Page Icons under the open book icons to open references for selected functions.



- ▶ The related User Guide topic content will be displayed in the Topic Pane on the right.
- ▶ Some topics have additional notes, which are signified with this red arrow: ➔ (see below)
- ➔ Reference topics cascade identically to their equivalent selections in the title section of the menu bar.

#### 1.1.1.4 Optimizing Visibility

##### Using the eBook Part IV: Optimizing Visibility

- ▶ To optimize the Topic Pane field of view in your eBook:



- ▶ Aim your mouse pointer at the Split Bar, which separates the two panes.

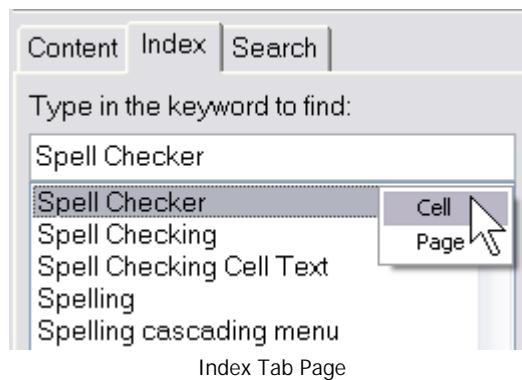


- ▶ When the Split Pointer is displayed, depress your primary mouse button to grip it.
- ▶ Drag left with your mouse to decrease Navigation Pane width.
- ▶ Release the primary mouse button when maximum Topic Pane width is reached.
- ▶ To increase Navigation Pane width, reverse the process.

#### 1.1.1.5 The Index Feature

##### Using the eBook Part V: The Index Feature

- ▶ Click on the Index Tab to display the Index Tab Page.

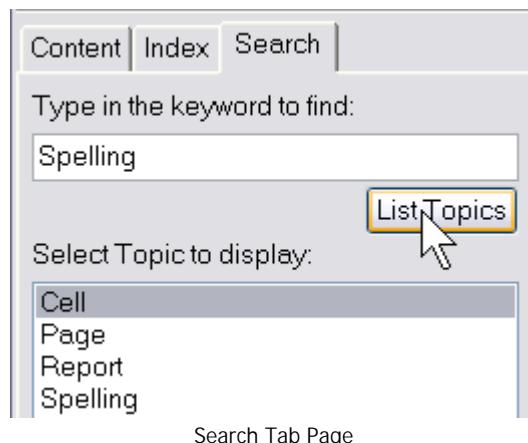


- ▶ Type a keyword into the Find Field or select one from the list. As you type, the topic associated with that keyword is displayed live in the Topics Found Column. Words that appear higher in the column are the best matches.
- ▶ When multiple topics use the same keyword, a right-click on the word displays a pop-up list. There are significant instances of the keyword that you are looking for in these "pop-up topics".
- ▶ Click once on a keyword, or on any pop-up list item to display the associated topic in the Topic Pane.

#### 1.1.1.6 The Search Feature

##### [Using the eBook Part VI: The Search Feature](#)

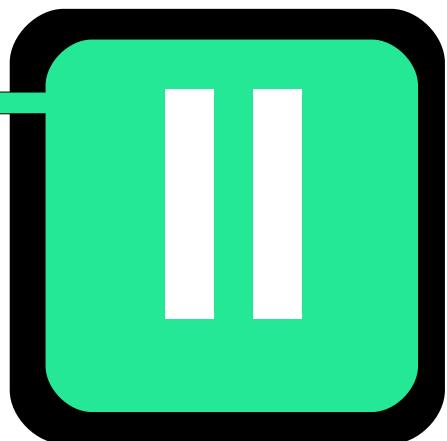
- ▶ Click on the Search Tab to display the Search Tab Page.



- ▶ The Search Page provides users with the capability to query the eBook for any Topic using keywords.
- ▶ Type the keyword into the Search Box and click on the List Topics Button.
- ▶ Double-click on any selection from your results to display the associated topic in the Topic Pane.



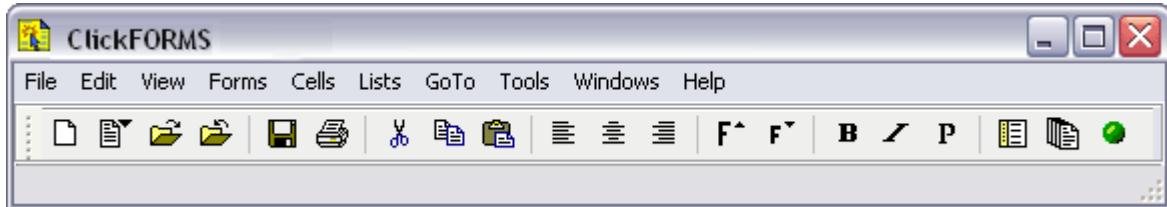
Part



## 2 Overview

### The Overview Section

This section includes supporting information on software features, functions and requirements.



The ClickForms XP Basic Interface

► The following topics are included in this section:

- [About the Software](#)
- [Graphic User Interface](#)
- [Navigation](#)

## 2.1 About the Software

### Software Overview

- [System Requirements](#)
- [Digital Container Technology](#)

## 2.1.1 System Requirements

### Software System Requirements

- Although our software will run on Microsoft® Windows® 98 SE/2000-SP3/Me and Windows®NT 4.0 with Service Pack 6 installed, Bradford Technologies Inc. has met all Microsoft's technical software requirements to attain the [Designed for Microsoft® Windows® XP](#) certification for this application.

### Comparison Table of System Requirements

ClickForms Specification Chart		
Parameter	Minimum System Specs	Recommended System Specs
Operating System	Windows 95	Windows XP Professional
CPU	Intel Pentium®	Intel Pentium® 4
Clockspeed	200 MHz or faster	2.2 GHZ
Ram	64MB RAM	512MB RAM
CD ROM	2x CD-ROM drive or faster	52x CD-ROM Drive
Video	800X600, High Color 16 Bit	1024X768, High Color 32 Bit
Display	VGA Monitor	17" flat screen monitor
Hard Drive	100MB (free to install)	100MB (free to install)
Modem	N/A	DSL/Cable Modem
Other	Microsoft Internet Explorer® 5.0+	Microsoft Internet Explorer 6.0

Designed For Microsoft® Windows® XP



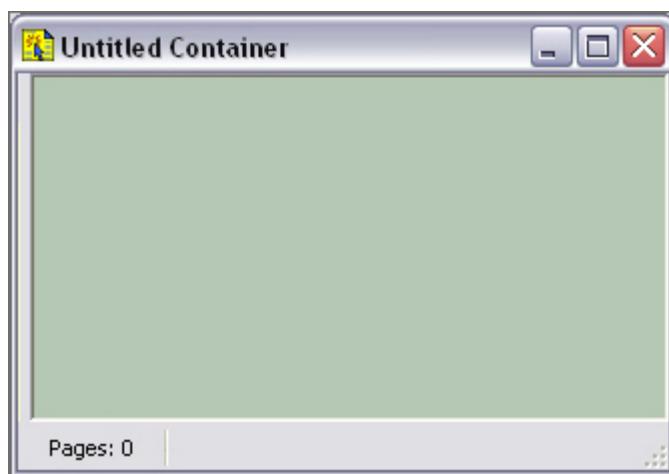
## 2.1.2 Digital Container Technology

### What is a Digital Container?

Our software is powered by Digital Container Technology. A container is the Extensible Markup Language (XML) based file that holds digital objects for display and manipulation in the [Workspace](#).

### Inside a Digital Container

Over 400 standard Appraisal forms can be added to your digital containers to create industry-wide compliant reports. The forms in your container support text formatting, mathematical variables and a wide variety of content. Digital images recognized by container technology include: photos, graphics, maps, sketches and scanned documents. The contents of a container may be edited, transmitted via Electronic Data Interchange (EDI), printed, merged, cloned or archived for future reference. Below is an image of a Digital Container:



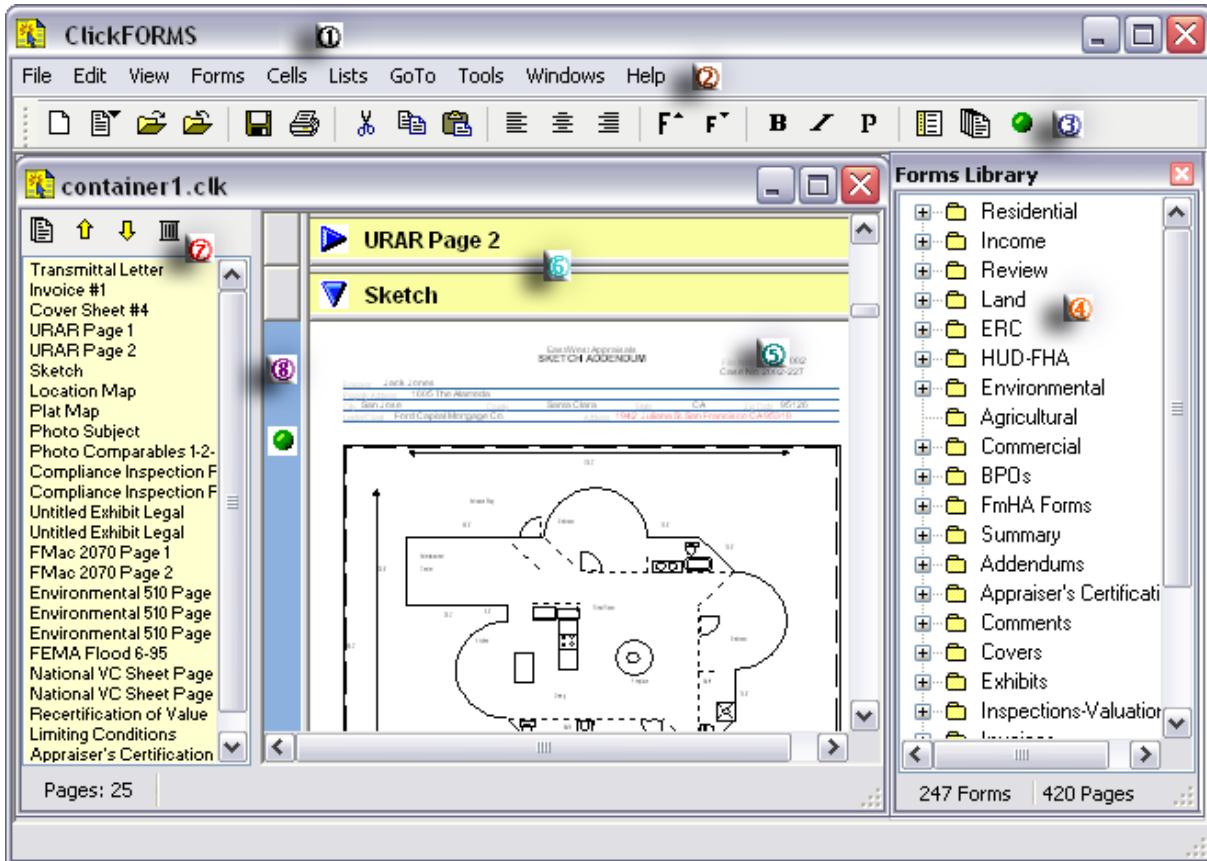
The Digital Container

All new empty containers are named "Untitled Container". Digital Containers allow multiple digital objects such as forms, text, images, etc. to be stored in one file or container. Within a container, these documents or objects can be viewed, edited and printed. Because all the objects are stored in one file, a container can be easily transmitted or archived and the forms or objects within secured from unauthorized tampering. Containers can also be merged so that documents processed by different departments or individuals can be combined for a final document. Our software enables appraisers and supervisors to certify paperless reports prior to submission by embedding [digital signatures](#) into their containers.

## 2.2 Graphic User Interface

### Elements of the User Interface

In this section, elements of the Graphic User Interface will be identified and defined:



Graphic User Interface Component Reference

### Interface Components

The Graphic User Interface includes the components below. Click on a name to view the description:

#### Graphic User Interface Components

- |                                      |  |
|--------------------------------------|--|
| <b><a href="#">The Title Bar</a></b> | <b><a href="#">The Menu Bar</a></b>    |
| <b><a href="#">The Toolbar</a></b>   | <b><a href="#">Forms Library</a></b>   |
| <b><a href="#">The Workspace</a></b> | <b><a href="#">Page Title Bars</a></b> |
| <b><a href="#">The Forms Man</a></b> | <b><a href="#">The Bookmark</a></b>    |

## 2.2.1 The Menu Bar

### About the Menu Bar

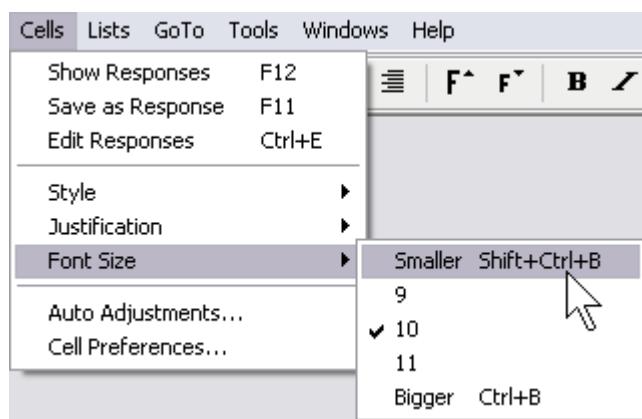
The menu bar contains menu titles which are used to access drop-down menus.



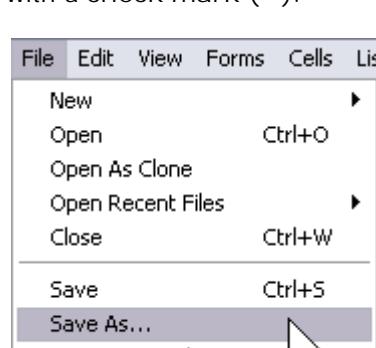
- ▶ Each menu contains items that enable users to launch commands.



- ▶ Some menus have items with additional cascading menus that contain related items.



- ▶ Default settings are indicated with a check mark (✓).



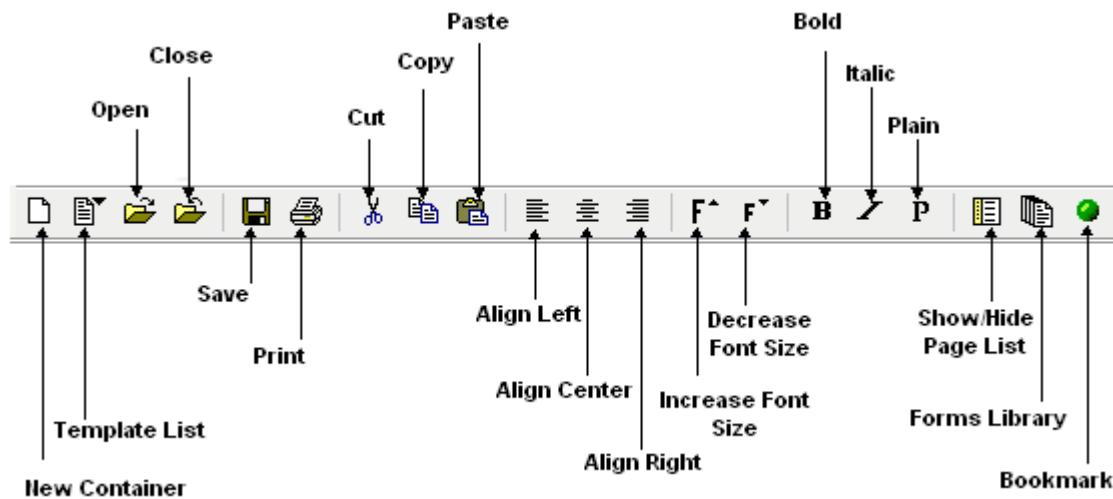
Item Requiring Additional Information

- ▶ Menu items requiring additional information to complete a task are marked with an ellipsis (...).

## 2.2.2 The Toolbar

### Toolbar Commands

- The Toolbar offers a selection of button controls that enable users to launch commands with a single mouse click.



Toolbar Component Reference Diagram

- The Toolbar Commands section contains the following topics:

- [Toolbar Properties](#)
- [Toolbar Consoles](#)
- [Toolbar Accessibility](#)

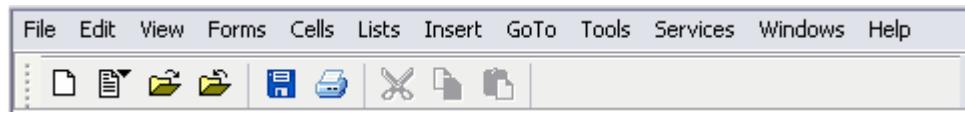
### 2.2.2.1 Toolbar Properties

#### Properties of the Toolbar

- ▶ The Toolbar is docked below the [Menu bar](#) in a perpetually visible state.



- ▶ When the application is re-sized to full screen view, or to a larger window, the Full Toolbar is displayed.
- ▶ The Toolbar command buttons can be used to perform the equivalent actions of [Menu bar](#) items.
- ▶ Actions, properties and settings controlled by Toolbar buttons are represented by stylized graphic images.
- ▶ Buttons are auto-raised by mouse cursor activation. Hovering a mouse cursor over each button will pop up a ToolTip that identifies the button command and associated shortcut key(s) in a small text .
- ▶ Buttons used for common purposes are grouped together into [Toolbar Consoles](#).



- ▶ When the application is re-sized to a smaller window, the Minimal Toolbar is displayed.

### 2.2.2.2 Toolbar Consoles

#### Toolbar Console List

► Here is a list of consoles in the order that they appear on the Toolbar. Click on any button title below to view the Help topic reference for its equivalent command in the [Menu bar](#).

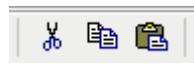
#### Toolbar Console List



1. [File Console](#)
  - [New Container](#)
  - [Template List](#)
  - [Open](#)
  - [Close](#)



2. [Output Console](#)
  - [Save](#)
  - [Print](#)



3. [Clipboard Console](#)
  - [Cut](#)
  - [Copy](#)
  - [Paste](#)



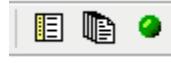
4. [Alignment Console](#)
  - [Align Left](#)
  - [Align Center](#)
  - [Align Right](#)



5. [Font Size Console](#)
  - [Increase Font Size](#)
  - [Decrease Font Size](#)



6. [Font Style Console](#)
  - [Bold](#)
  - [Italic](#)
  - [Plain](#)



7. [Features Console](#)
  - [Show/Hide Forms Manager](#)
  - [Forms Library](#)
  - [Bookmark](#)

### 2.2.2.3 Toolbar Accessibility

#### Alternate Access to Toolbar Commands

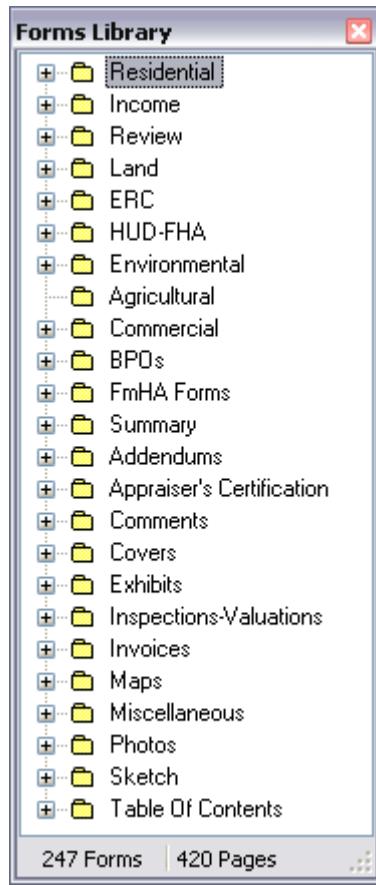
► [Keyboard Shortcuts](#) can be used as an alternative method for launching Toolbar button commands.

► See the [Keyboard Shortcuts](#) table.

## 2.2.3 The Forms Library

### About The Forms Library

- The [Forms Library](#) contains all the documents required for generating appraisals. Electronic versions of these forms are compliant with national Finance and Real-Estate appraisal standards.



The Forms Library

- The [Forms Library](#) window displays a list of the files and folders in this default location:

C:\Program Files\Bradford \ClickForms\Forms Library

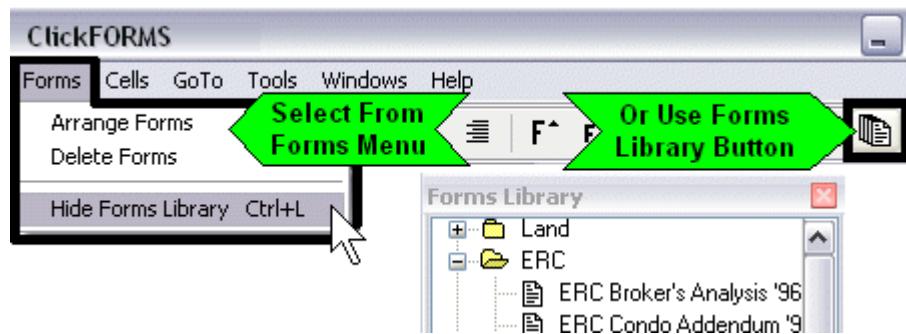
- New folders created in the physical directory above will be represented in the [Forms Library](#). The forms contained within each folder will be accessible for duplication into your [container](#).

- This method can also be incorporated for use with [custom forms](#).

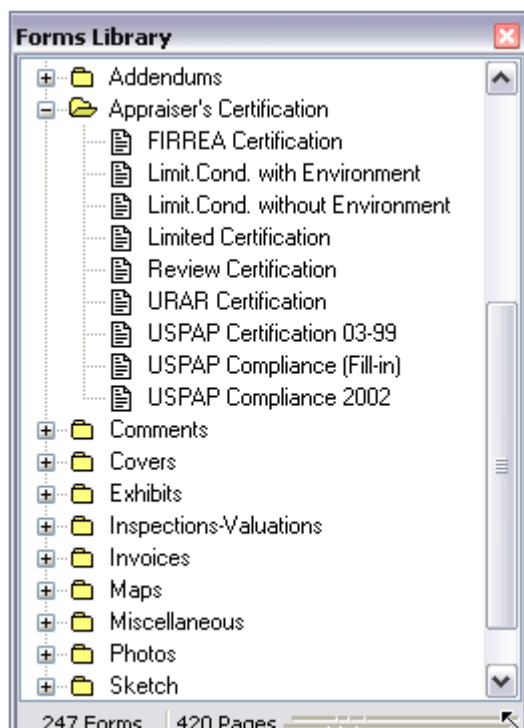
### 2.2.3.1 Navigation, Display and Functionality

#### Forms Library Navigation, Display and Functionality

- 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 or hide the Forms Library. You can also click on "Forms" in the Menu Bar and select the View/Hide Forms Library item from the Forms Menu.

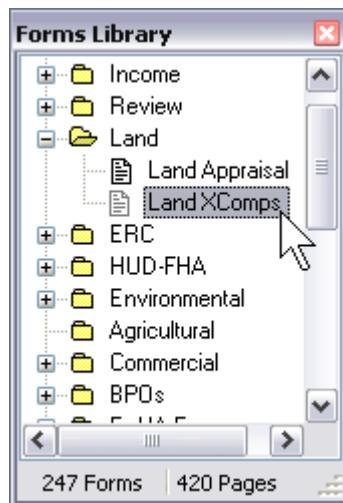


- Drag the Forms Library to move it anywhere on your desktop, or click and drag the handle in the lower right corner to resize it. Use this image as a reference:



- Although the Forms Library is an advanced interface, it is easy to use: Just click on the plus sign next to any Form Category Folder to view an index of the Forms that are contained

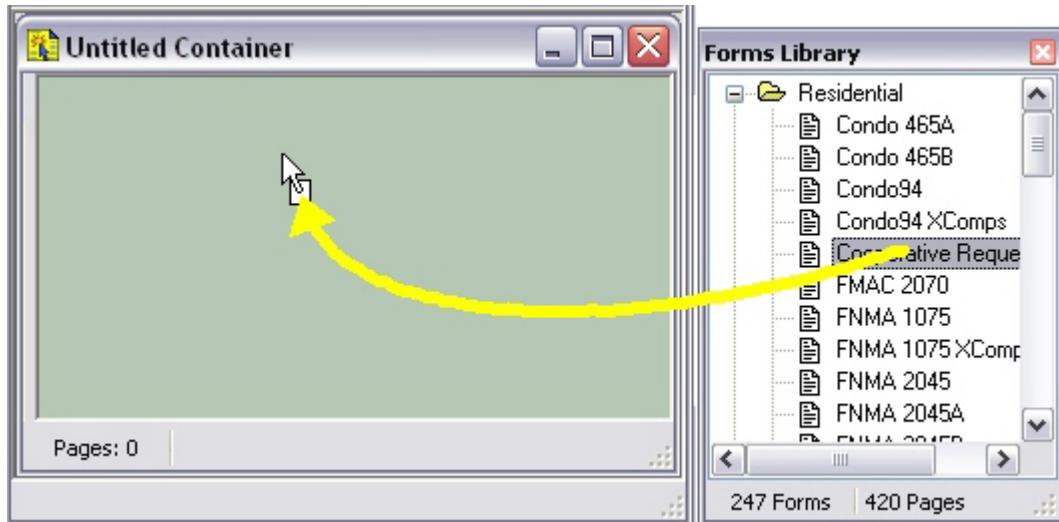
within. Double-clicking on the form name adds a copy to your report. Click on the minus sign to collapse the form index.



Form Selection

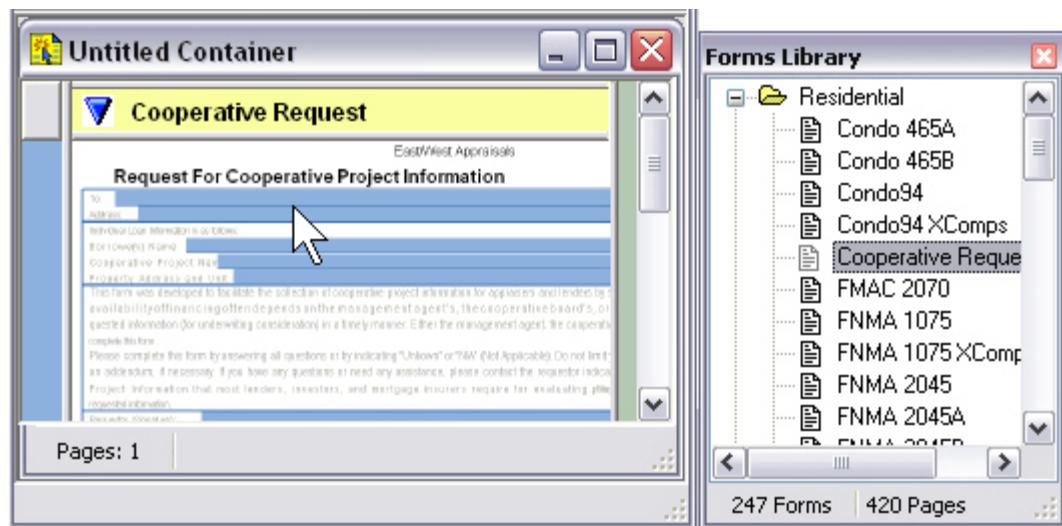
► Forms can be added to your container from the [Forms Library](#) by dragging and dropping:

1. Drag the form from the [Forms Library](#) to the [container](#).



Dragging Form Into Container From Forms Library

2. Release the form and drop it into the [container](#).



Releasing Mouse Button Over Container Adds Form

### 2.2.3.2 Forms Archive

#### [Forms Library Archives](#)

► The [Forms Library](#) is organized into categories, which contain the forms required for specific functions.

Default Form Categories:

- Residential: Forms used to appraise homes, mobile homes, condos, coops & other residences; and for re-evaluations/second mortgages.
- Income: Forms used to calculate the income of leased units.
- Review: The purpose of these forms is to provide an opinion on the content and accuracy of appraisal reports that have already been done.
- Land: Forms used to appraise vacant property.
- ERC: The purpose of Employee Relocation Counsel forms is to estimate the anticipated sales price for the relocation of an employee's residence. The intended use of the appraisal is to assist an employer in facilitating the employee relocation process.
- HUD-FHA: Forms to ensure compliance with the Housing Urban Development policy appraisal guidelines.
- Environmental: Forms used for inspection overviews and for recording an Environmental Inspector's residential assessment.
- Agricultural: Forms used to appraise property that is for agricultural use.
- Commercial: Appraisal reports for small/existing properties used for commercial or industrial purposes.
- BPOs: Fannie Mae and Freddie Mac Brokers Price Opinions.
- FmHA Forms: Farmer's Home Administration forms required by the US Department of Agriculture.
- Summary: Limited, Restricted and Summary Appraisal Reports.
- Addendum's: Additional forms (addenda) frequently used in an appraisal report, i.e., Certificate of Value, FEMA Flood, etc.
- Appraiser's Certification: Legal disclaimers that are required additions to residential and review reports.
- Comments: Blank pages used for additional information that would not fit within the form cell parameters.
- Covers: A variety of front matter used to bind appraisal reports.
- Exhibits: Blank pages used to include scanned documents and files in graphic format.
- Inspections-Valuations: A variety of property inspection forms.
- Invoices: Submitted by appraisers to bill their clients.
- Maps: Similar to exhibits, but specifically titled for map addenda .
- Miscellaneous: Holds miscellaneous forms, such as your resumé.
- Photos: Forms that are used to contain photos of the property to be appraised and its Comparables.
- Sketch: Holds the different sketch addenda.
- Table Of Contents: Holds Table of Contents pages, which are automatically filled in when added to a container.

## 2.2.4 The Workspace

### About the Workspace

- When the User Interface is expanded to maximum size, the Workspace comprises the largest visible area.

The screenshot shows the ClickFORMS application window with the title "ClickFORMS". The menu bar includes File, Edit, View, Forms, Cells, GoTo, Tools, Windows, and Help. The toolbar contains icons for file operations like Open, Save, Print, and various selection tools. The main workspace displays a "URAR Page 1" document. The document header reads "LENDERS APPRAISAL" and "UNIFORM RESIDENTIAL APPRAISAL REPORT". It includes fields for "File No. JN-4050", "Case No. 33056", "City MIAMI", "State FL", "Zip Code 33056", "County DADE", "Tax Year 2000", "P.E Taxes \$ 1,110.20", "Special Assessments NA", "Assessor's Parcel No. 30-3122-029-0180", "Owner TANGLE BUTTERFIELD", "Current Owner IVERY & ADAMS", "Occupant X Owner Tenant Vacant", "Project Type PUD", "Condominium/HUD(Only) HOD4", "Sale Price \$ 84,000", "Date of Sale PENDING", "Imp Reference 03-41-22", "Census Tract 18.030", "Neighborhood or Project Name BUCKEYE PARK", "Address 8222 W FLAGER STREET, MIAMI, FLORIDA, 33144", "Lender/Clien STCKTON, TURNER & PHILLIPS", "Appraiser Dan McQuilliams", "Address 7174 Santa Teresa Blvd. Suite A-2 San Jose, Ca 95139". Below these details is a large table with columns for Location, Urban/Suburban/Farm, Predominant occupancy, Single family housing, Present landuse, and Land use change. The table includes rows for Over 75%, 25-75%, Under 25%, Owner, Tenant, Vacant, etc. At the bottom of the form, there are notes about racial composition, neighborhood boundaries, factors affecting marketability, and subject property location relative to amenities.

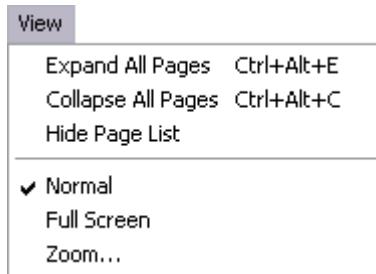
The Workspace

- The Workspace supports rendering of a variety of digital objects. This enables you to add Forms, input textual data, calculate formulas, import graphics and scans, and perform all the tasks necessary to create your appraisal reports.

## 2.2.5 Page Title Bars

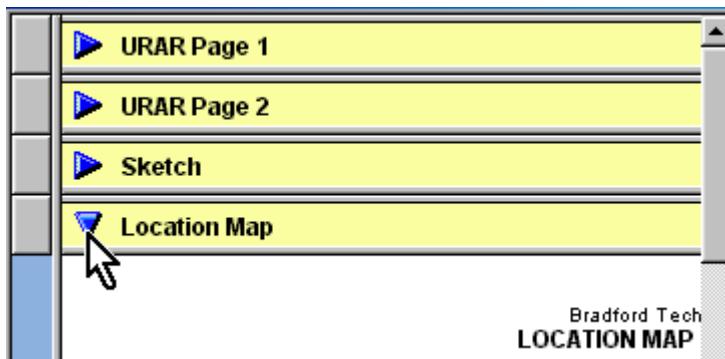
### Page Title Bars

- ▶ Use the View Menu to control the view of your Page Title Bars:



The View Menu

- ▶ Page Title Bars are used for expanding and collapsing appraisal form pages in the Workspace.



Page Title Bars

- ▶ To expand a page into full view in the Workspace, click on the blue arrow.



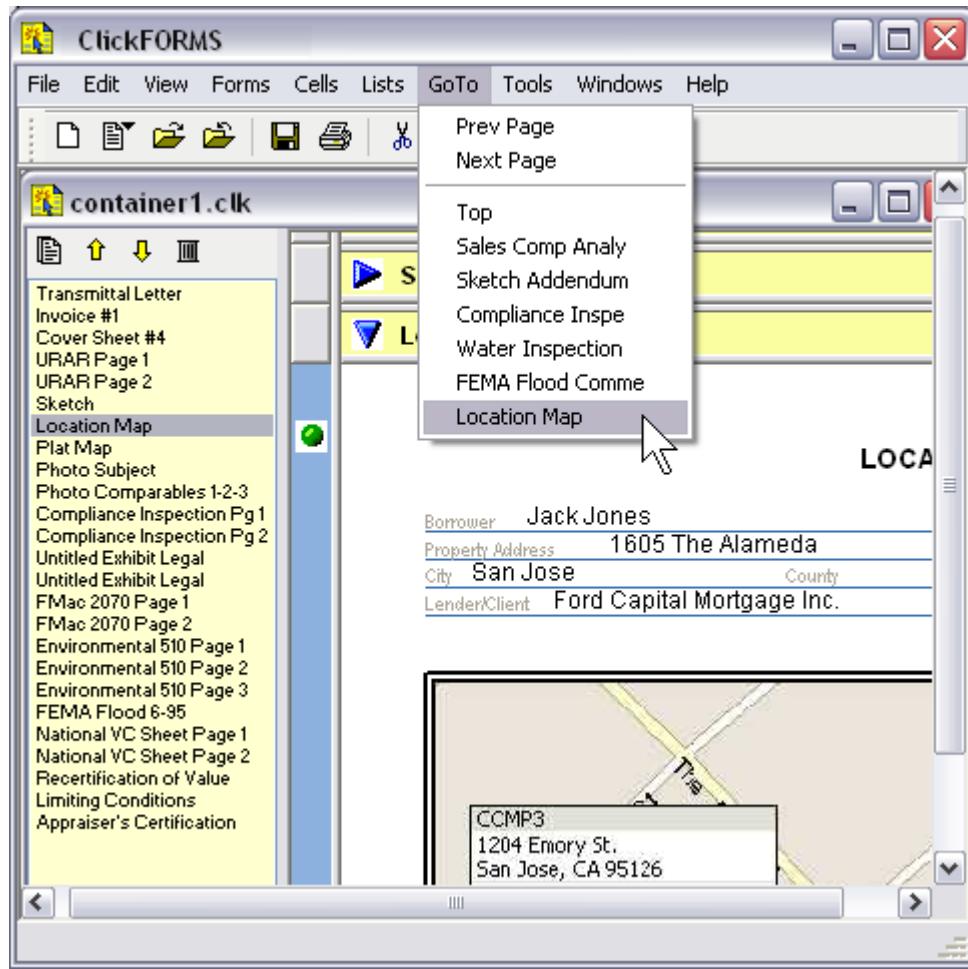
Expanded/Collapsed

- ▶ Clicking on the arrow a second time will collapse the page out of view.

## 2.3 Navigation

### Navigating Through A Report

- This section will assist users to identify and utilize navigation features.



Interface Navigation Components

### Navigation Components

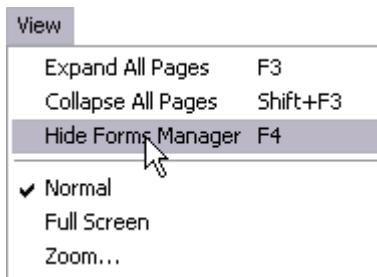
- The following features assist users in navigating through your reports:
  - [The Forms Manager](#)
  - [The Bookmark](#)
  - [Keyboard Shortcuts](#)
- [GoTo Menu](#) selections, the [Tab] key and Scroll Bars can also be used for navigation.

### 2.3.1 The Forms Manager

#### Viewing The Forms Manager

► The Forms Manager, which is used to view and control the pages in a report, can be displayed or hidden by using commands that are built-in to three interface components:

1. Click on the Show/Hide Forms Manager Button to display or hide the Forms Manager (see example below).
2. Click on Hide Forms Manager from the [View Menu](#) to hide the Forms Manager window.

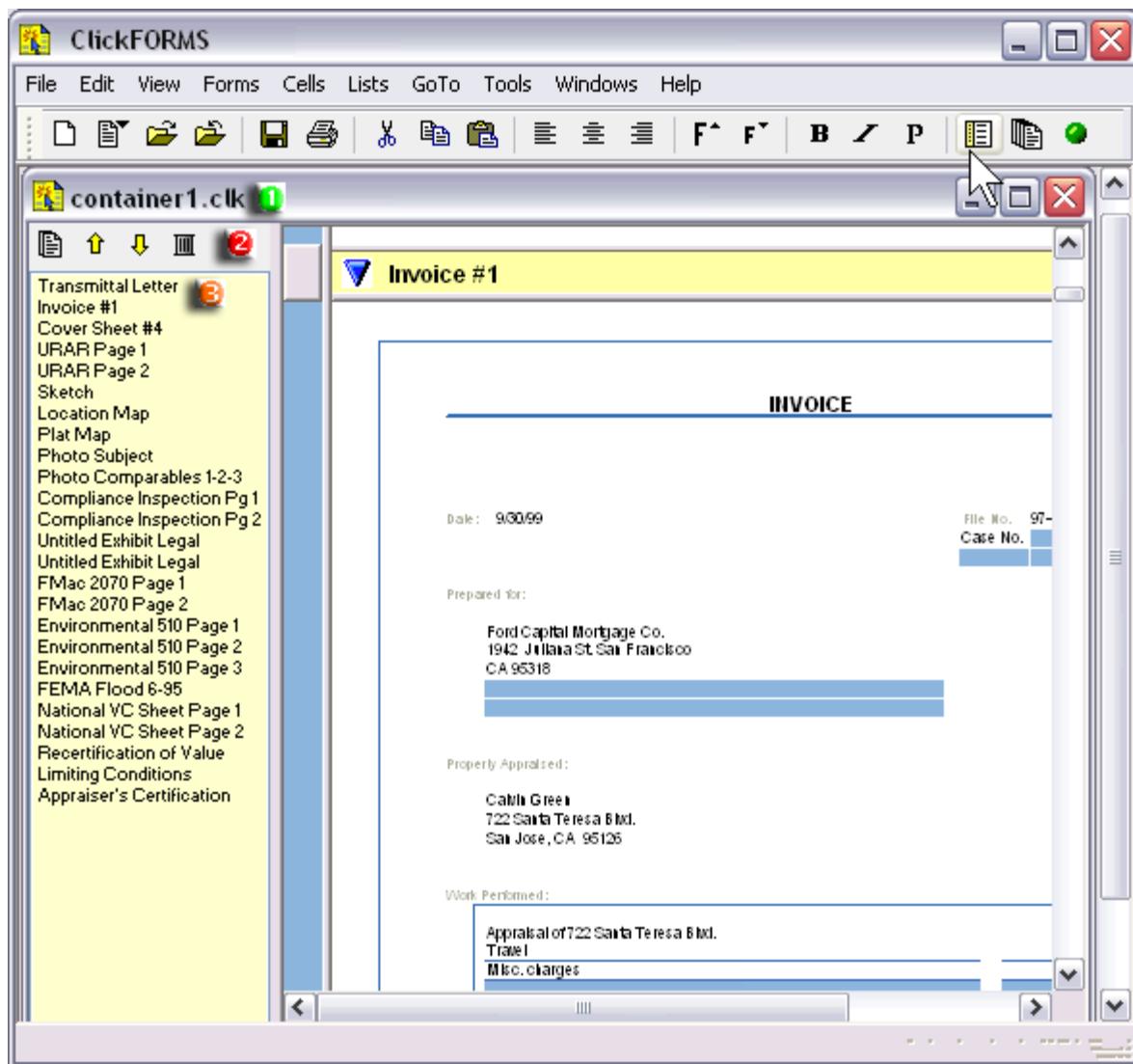


The View Menu

3. Click on Show Forms Manager from the [View Menu](#) to display the Forms Manager window .

#### Forms Manager Components

- The Forms Manager interface is comprised of three components.
- ➊ A Container Title Bar, which displays the full name and extension of the container file.
  - ➋ A Container Toolbar, for page manipulation and for navigating the report.
  - ➌ A Container Portal where forms can be dropped, viewed or selected:



Forms Manager Components

- ▶ To create an appraisal report, forms may be added to the container from the Forms Library via the Forms Manager by several methods, for example, by using drag-and-drop or with hot-key/mouse-click combinations.
- ▶ By default, pages are listed by name in the order that they were added, or most recently arranged when the report was last saved.

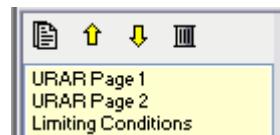


The Application Title Bar

- ▶ When the Forms Manager is hidden (full-screen view) the file name will appear in the Application Title Bar.

### The Container Toolbar

- There are four Container Toolbar buttons:



The Container Toolbar

Use the Show/Hide Forms Library button to Hide or Show the [Forms Library](#). The button graphic is stylized to resemble two hard-copy form pages.

Select a form and click the Up Arrow to move it towards the front of the report.

Select a form and click the Down Arrow to move it towards the back of the report.

Use the Delete Form Button (Trash can) to remove Forms from the report. The button graphic is easily identifiable, since it resembles a stylized trash can.

► Some [Forms](#) are sets of pages that will always be moved or deleted together.

### 2.3.2 The Bookmark

#### The Bookmark

The Bookmark is used to keep track of and set placeholder's for key places in your report. You can define [Marker Names](#) for your Bookmarks which appear in the [GoTo menu](#) and can be jumped to with a single mouse-click.

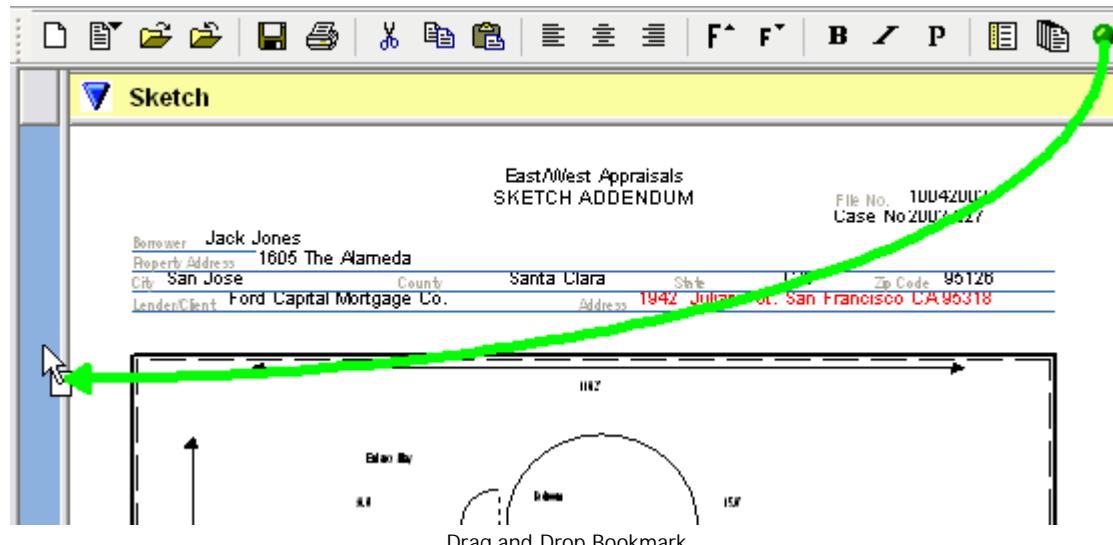
#### Using the Bookmark

- ▶ To set a Bookmark for a key place in your report:



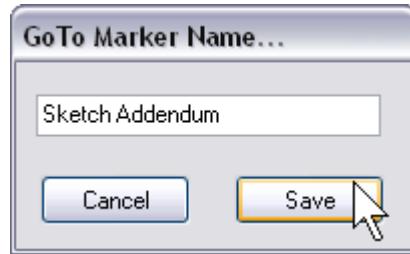
The Bookmark

- ▶ Drag and drop the Bookmark (green ball) from the [Toolbar](#) to the blue Marker Bar on the left of the report item that you want to remember.



Drag and Drop Bookmark

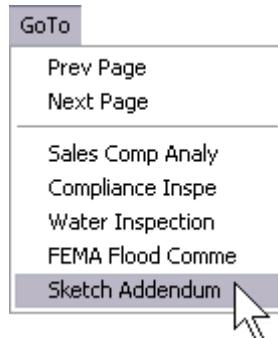
- ▶ When the [GoTo Marker Name](#) dialog appears, populate the field with a significant and unique name for the corresponding [Bookmark](#) location.



GoTo Marker Name Dialog

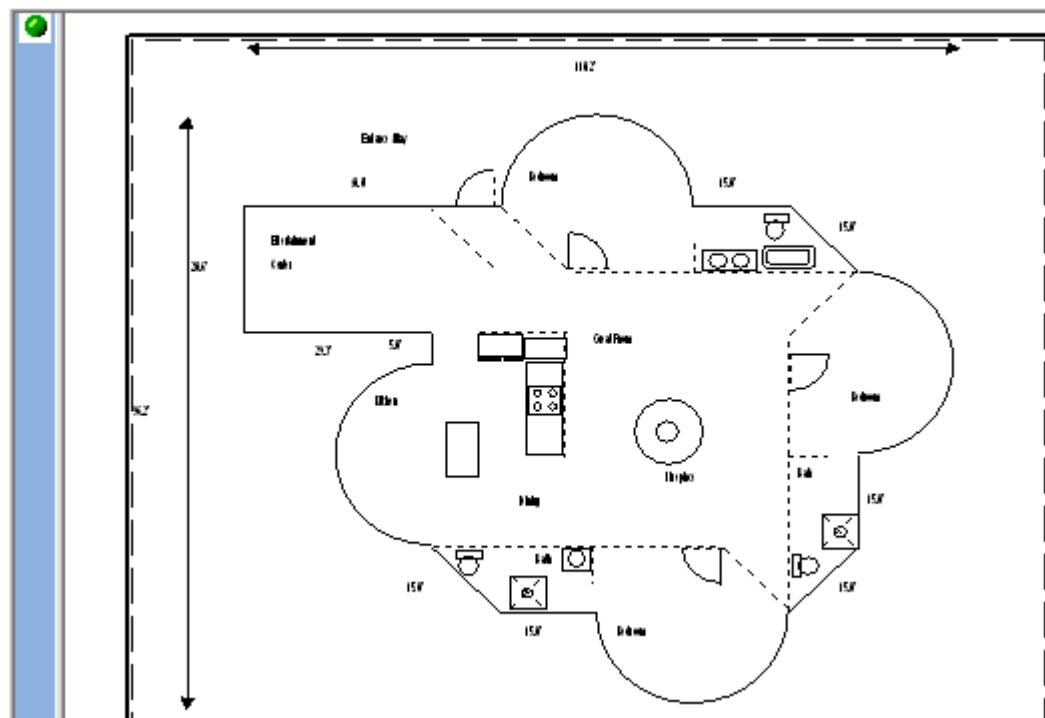
- ▶ Click on the [Save] button to create a Marker Title that can be accessed from the

GoTo menu.



## Marker Names in GoTo Menu

- Select any **Marker Name** from the **GoTo menu**, to jump to the Bookmarks in your report.



Book marked Sketch Addendum Page

- The [Bookmarks](#) that appear in the [GoTo menu](#) are unique for each report. There are no items in the [GoTo menu](#) for reports that have not been Bookmarked.

## 2.4 Keyboard Shortcuts

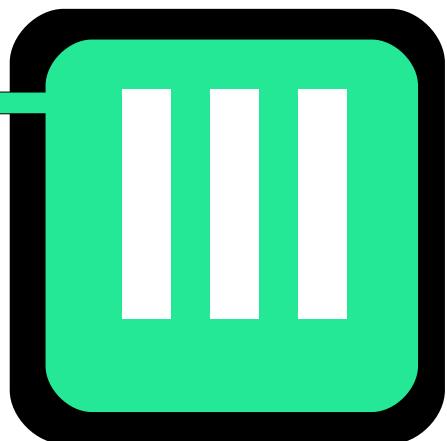
### Keyboard Shortcuts

The individual and combinations of keys indicated below will launch their respective commands.

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 ShowHide Toggle	F4
N/A	Report Spell Checker	F7
N/A	Launch Tell Me How	F1



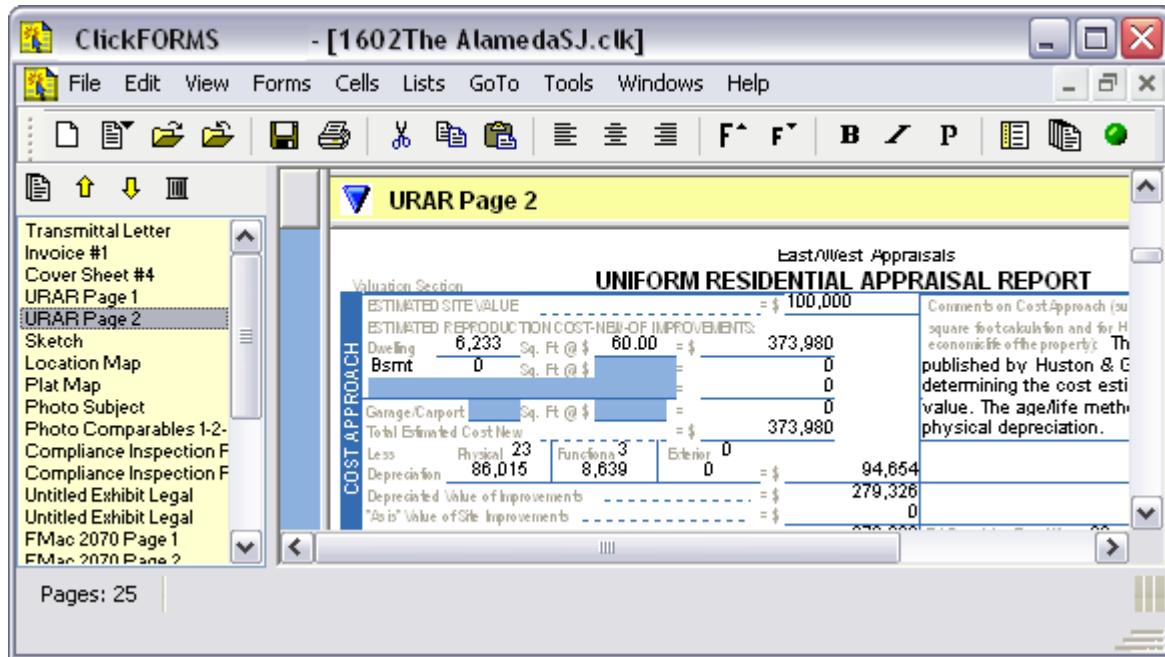
Part



### 3 Menu References

#### The References Section

- This section details Graphic User Interface components and their associated commands.



The ClickForms XP User Interface

#### Menu Bar Components

- The following menus are accessible via titles in the menu bar:

- [The File Menu](#)
- [The Edit Menu](#)
- [The View Menu](#)
- [The Forms Menu](#)
- [The Cells Menu](#)
- [The Lists Menu](#)
- [The GoTo Menu](#)
- [The Tools Menu](#)
- [The Windows Menu](#)
- [The Help Menu](#)

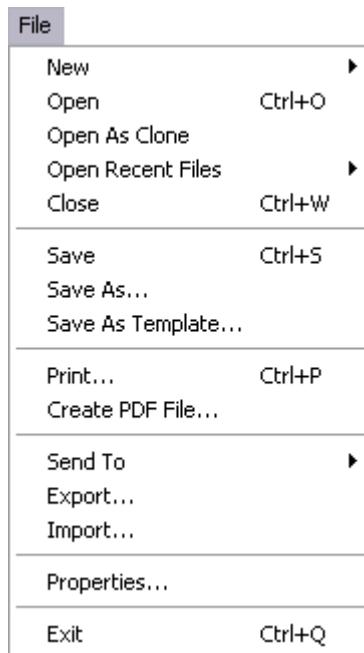
### 3.1 The File Menu

#### File Menu Commands

This menu displays a list of commands for launching [containers](#), and accessing, archiving, converting, communicating, rendering and maintaining reports.

#### Accessing the File Menu

- ▶ To access the File Menu:
- ▶ Point your cursor to the File menu title in the [menu bar](#) and click once.



The File Menu

### 3.1.1 New

#### New Menu Commands

The New menu offers two options for creating new reports:

- [Template](#)
- [Empty container](#)

#### Accessing the New Menu

► To access the New menu:



1. Click on the [File menu](#) title in the [menu bar](#).
2. Move the mouse cursor down to New.

► The New menu will be displayed.

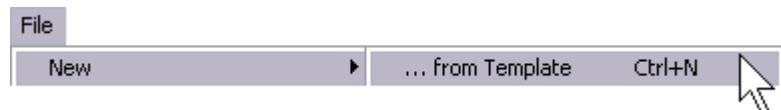
### 3.1.1.1 From Template

#### The New From Template Command

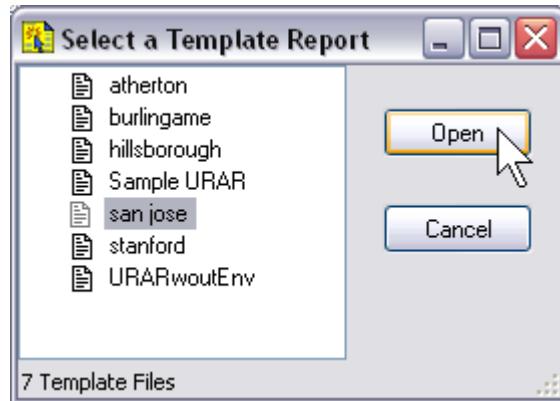
Use this command to start a new report with a template, which can contain preselected forms with data, sketches and maps that are ready to be used for a specific purpose.

#### Opening a Report Using a Template

- To open a new report using a template:

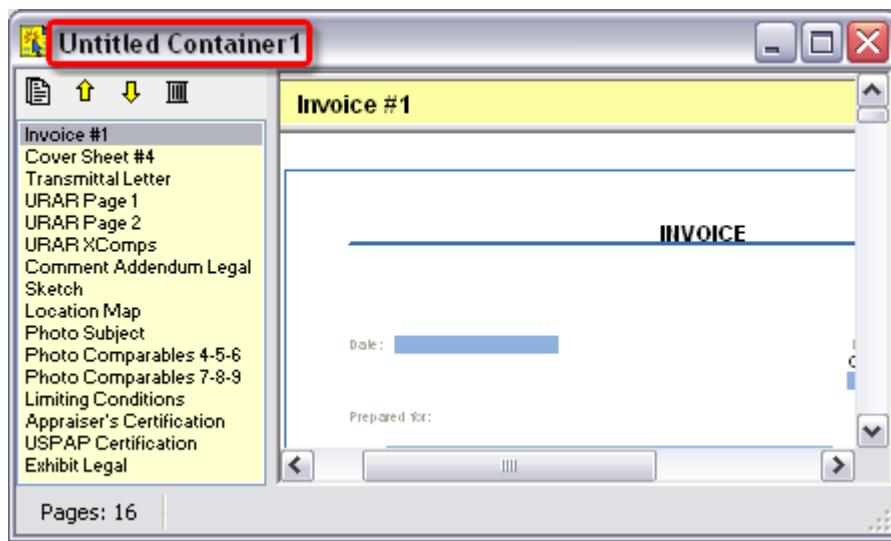


1. Click on the [File](#) menu title in the [menu bar](#).
2. Move the mouse down to "[New](#)".
3. Click the from Template item (or use the [Ctrl+N](#) keys).



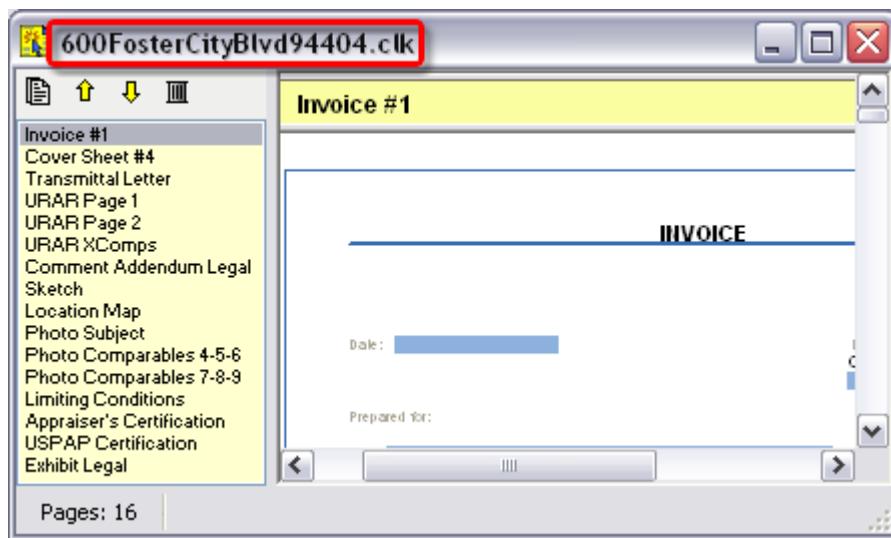
The Select Template Dialog

4. When the Select a Template dialog is displayed click on the template that you'd like to use.
5. Click on the [Open] button to launch an untitled [container](#) with your default forms.



Untitled Container

- The new report will remain untitled until it is saved.



Saved Report

- Once saved, the name of the file will appear in the title bar text.

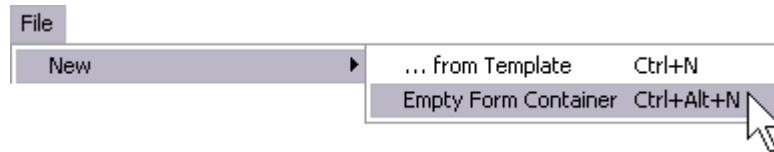
### 3.1.1.2 Empty Container

#### The Empty Form Container Command

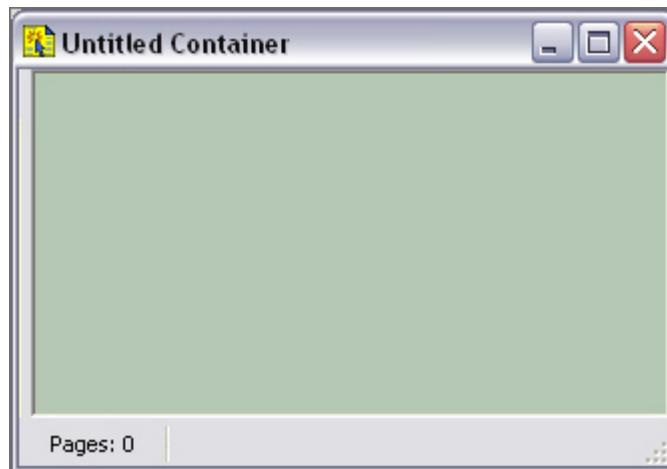
Use this command to open an empty form [container](#) to hold the forms that will make up your report.

#### Opening an Empty Form Container

- To open an empty form [container](#):



1. Click on the [File](#) menu title in the [menu bar](#).
2. Move the mouse down to "[New](#)" and click on the [Empty Form Container](#) item (or use the [Ctrl+Alt+N](#) keys).



An Untitled Form Container

- A new untitled form [container](#) will open.

- The empty [container](#) will remain untitled until it is saved.



A Saved Form Container

- ▶ When the [container](#) is saved, the name of the file will appear in the [title bar](#).

### 3.1.2 Open

#### The Open Command

Use this command to Open saved ClickFORMS reports and old Appraisers ToolBox Reports located on your computer, on external media (zip disk, CD, etc.), or on a network drive.

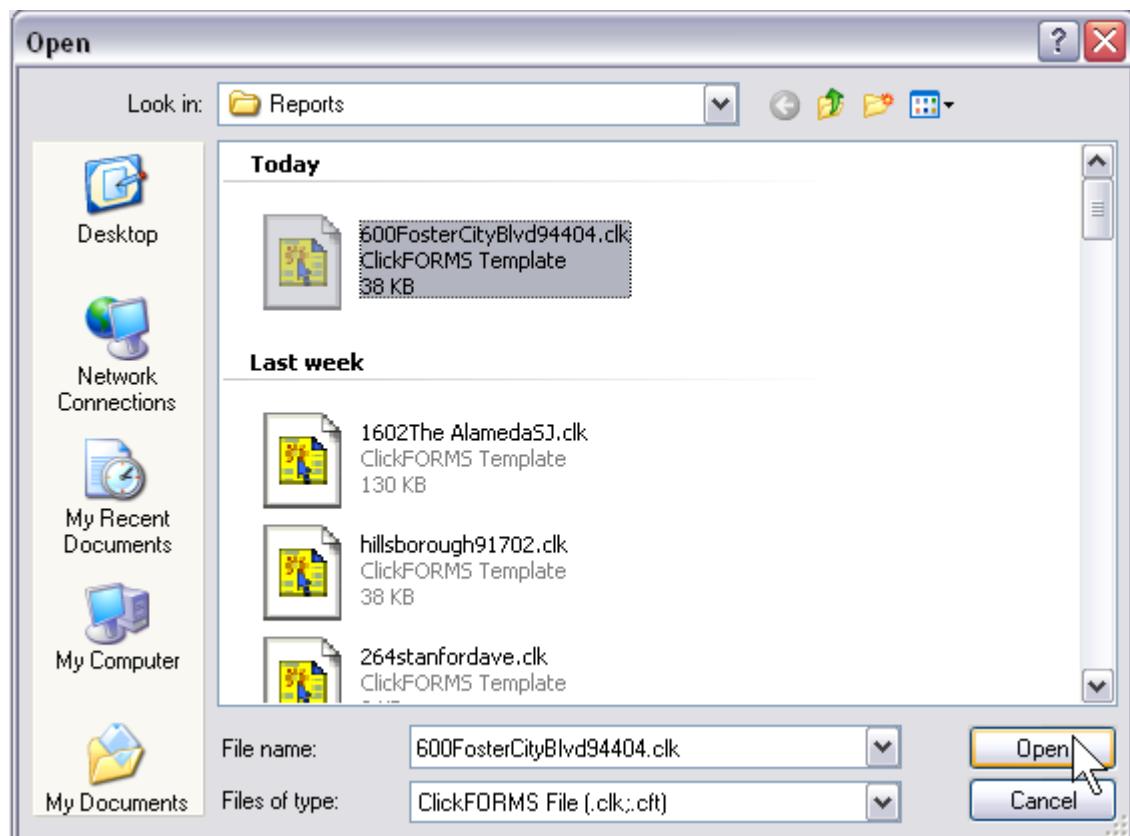
#### Opening Saved Reports

- To open a saved report:



1. Click on the [File menu](#) title in the [menu bar](#).
2. Click on Open (or use the [Ctrl+O](#) keys).

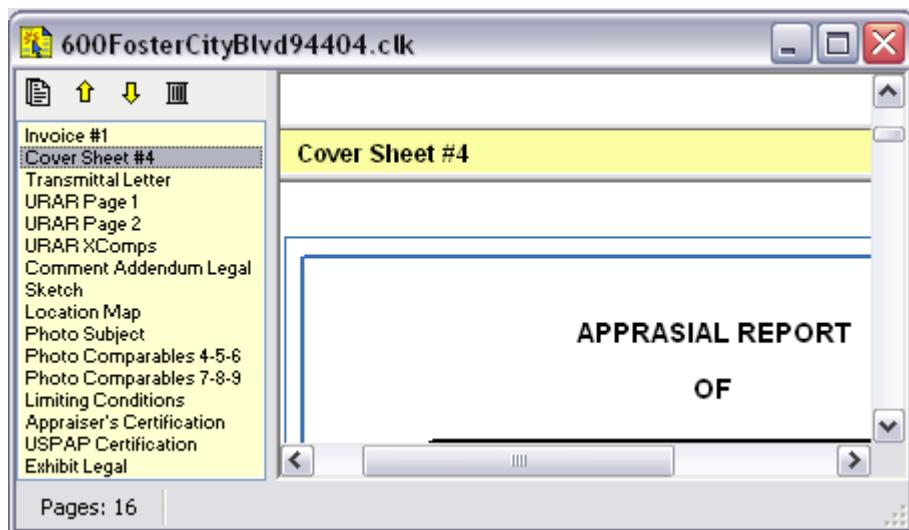
- The Open dialog will be displayed, showing the ClickFORMS Reports Folder by default.
- If you wish to open an old Appraisers ToolBox Report, proceed to Step 5.



The Open Dialog (Default Reports Folder)

- The Default Report directory can be set on the [Application Preferences Directories Tab Page](#).

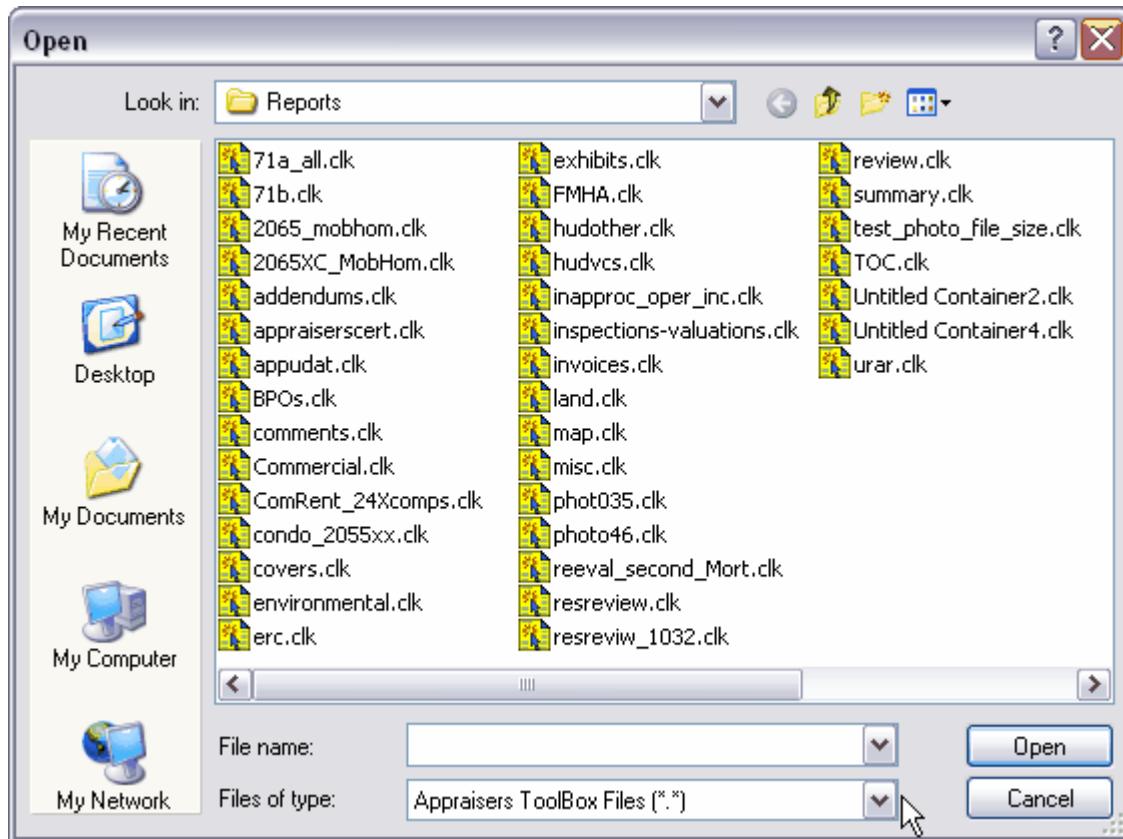
3. Click on a report to select it.
4. Click on the [Open] button to open the selected report.



Report Open in The Workspace

► The selected report will open in your [Workspace](#) as shown above.

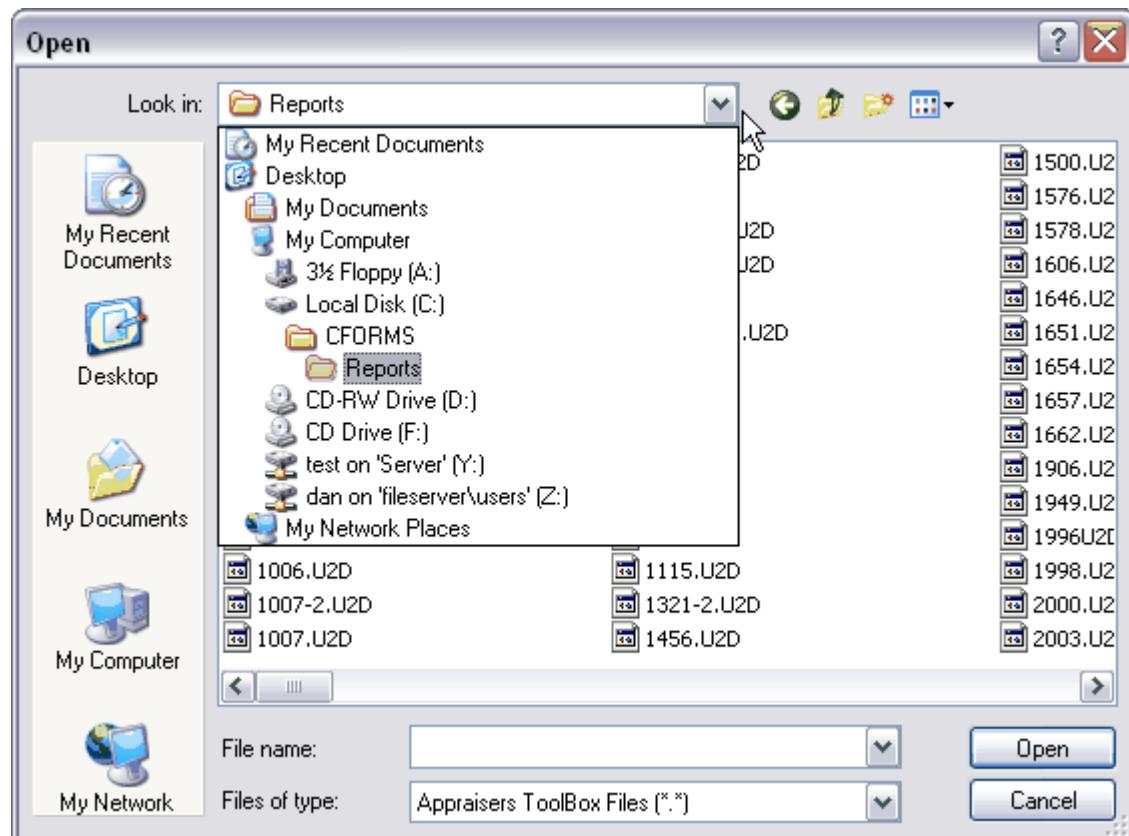
5. To Open an old ToolBox Appraisal Report, in the Open Dialog Window, Click on the File Type Button and Select "Appraisers ToolBox Files \*.\*".





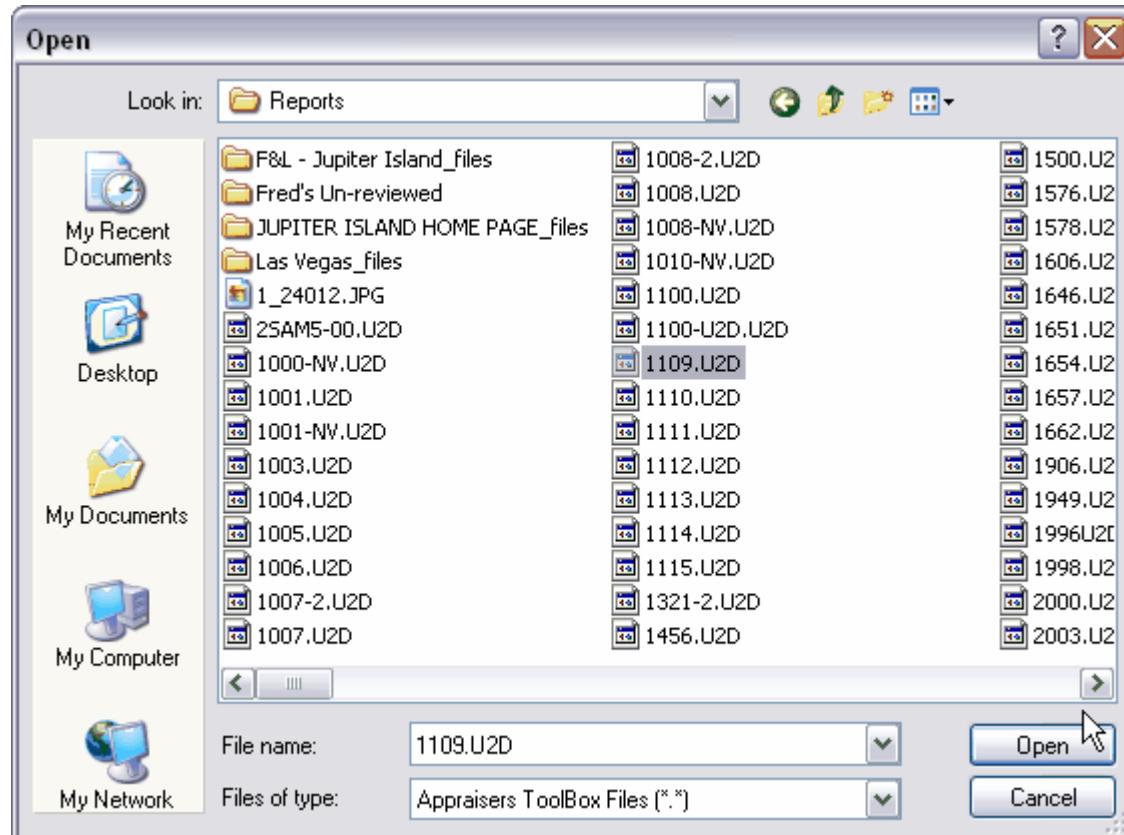
The Open Dialog Window

6. Now Click on the Look In box Arrow at the top of the Open Dialogue Window and Browse to the C:\Cforms\Reports Folder or other Folder you have saved your Appraisers ToolBox Reports in.



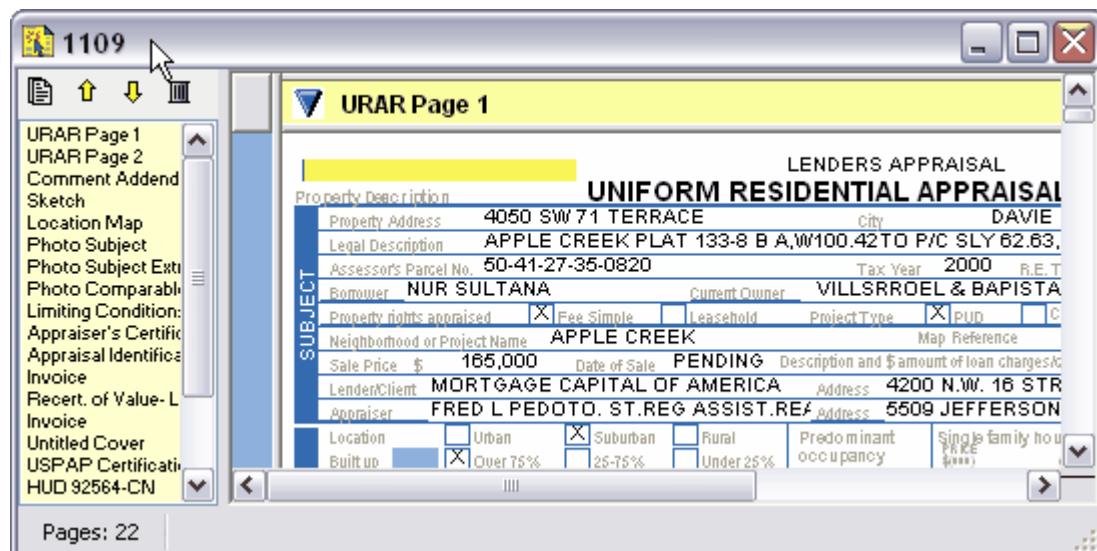
The Open Dialog Window

7. Select the Appraisers Toolbox Report you wish to open in ClickFORMS and Click on Open



The Open Dialog Window

- The selected report will open in your Workspace as shown Below.



Report Open in The Workspace

- You have now Opened an old Appraisers ToolBox Report in ClickFORMS!

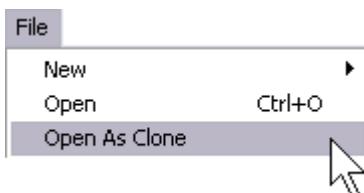
### 3.1.3 Open As Clone

#### The Open As Clone Command

Use this command to open saved reports as untitled copies (clones) that can be modified without affecting the original.

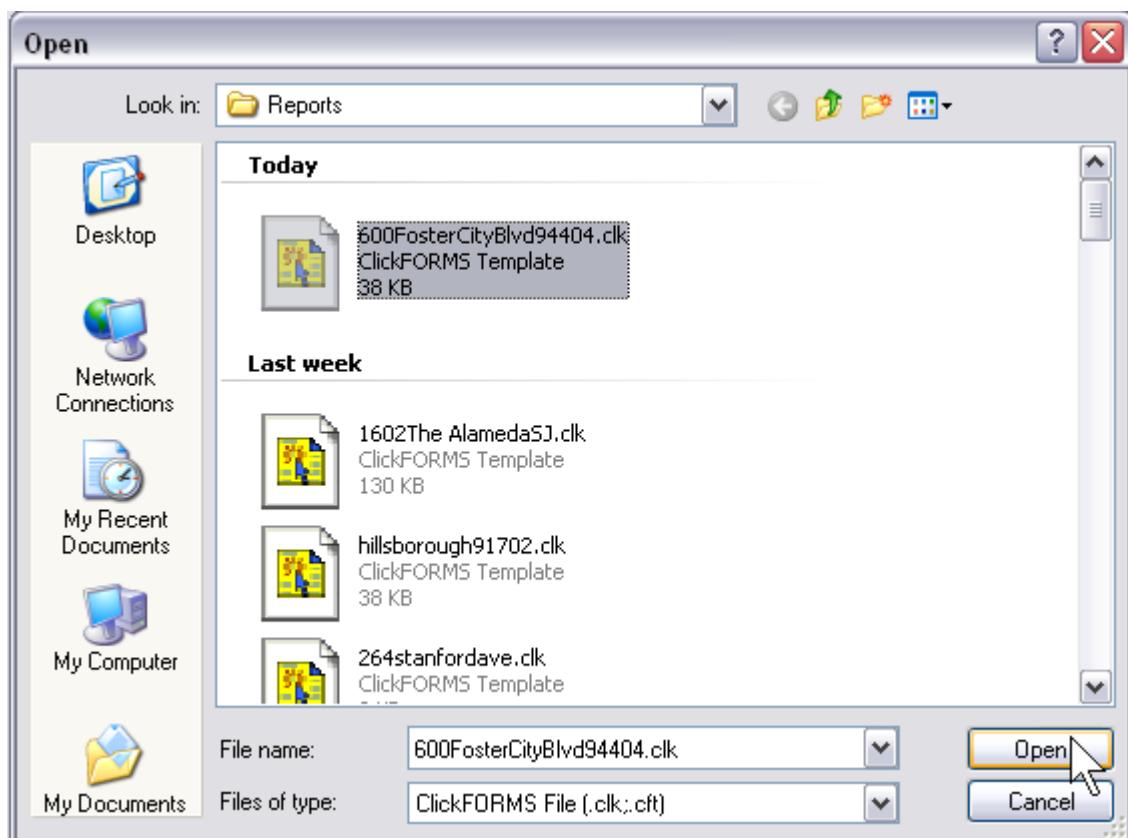
#### Opening Saved Reports As Clones

- ▶ To open a saved report as a clone:



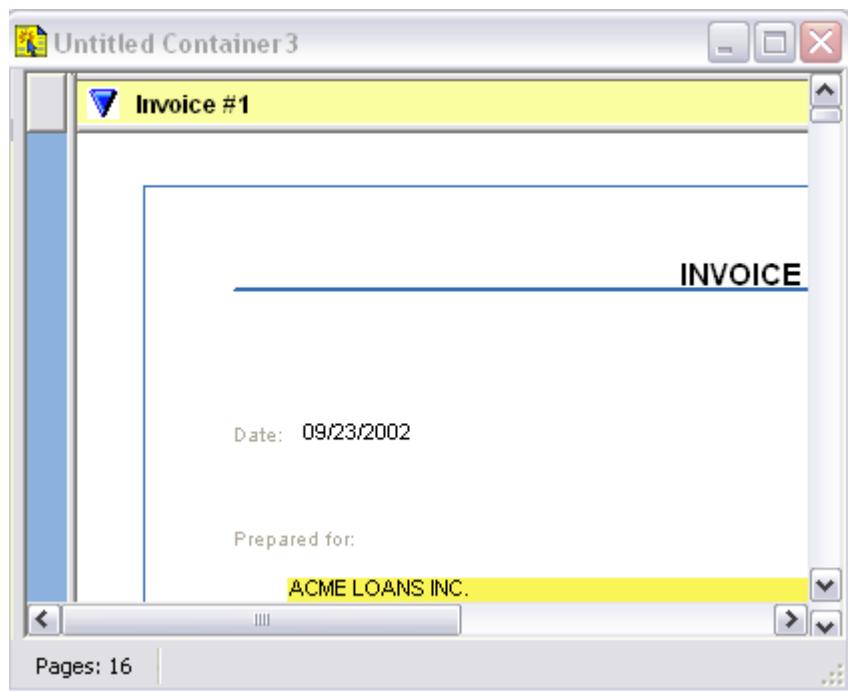
1. Click on the [File menu](#) title in the [menu bar](#).
2. Click on Open As Clone.

- ▶ The Open dialog will be displayed.



The Open Dialog

3. Click on the clone source report to select it.
4. Click on the [Open] button to launch a copy of the selected report.



An Untitled Cloned Report

- ▶ The cloned report will open in the [Workspace](#).

► The clone will remain untitled until it is saved. When the container is saved, the new file name will appear in the [title bar](#) text.

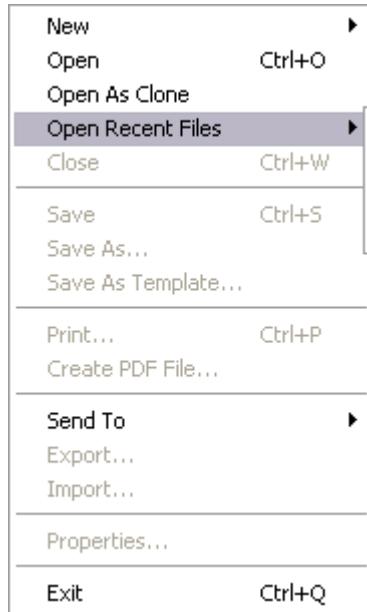
### 3.1.4 Open Recent Files

#### The Open Recent Files Command

Use this command to open saved reports that have been recently accessed.

#### Opening Recent Files

► To open recent files:



1. Click on the [File menu](#) title in the [menu bar](#).
2. Move the mouse cursor to Open Recent Files.
3. Click on your selection to launch the report into your [Workspace](#).

► The 10 (ten) most recently accessed files will be displayed. The files can be in different locations.

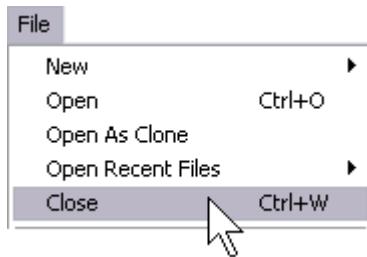
### 3.1.5 Close

#### The Close Command

Use this command to close reports that are open in the [Workspace](#) without shutting down the software.

#### Closing Reports

- To close an open report:

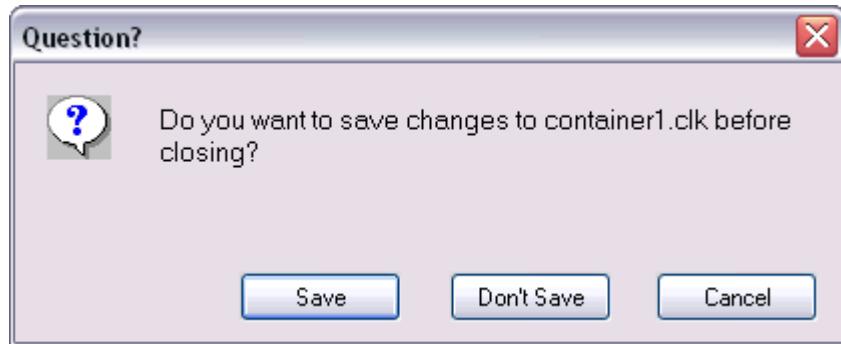


1. Click on the [File menu](#) title in the [menu bar](#).
2. Click on Close (or use the [Ctrl+W](#) keys).

- The report will close.

#### Saving Changes

If any changes have been made to the report and the report has not been saved, a "Question?" dialog will be displayed.

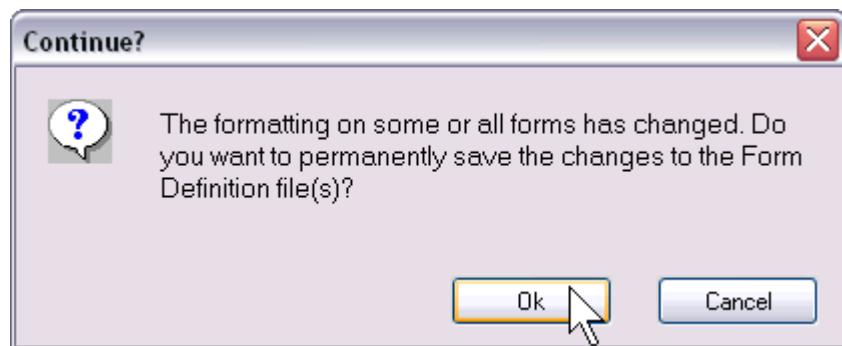


Save Changes Before Closing Report Dialog

- Click on one of the three buttons to proceed:

- Selecting [Don't Save] will close the report, discarding your changes.
- Selecting [Cancel] will cancel the Close command and the report will remain open.
- Selecting [Save] will save your changes and close the report.

- A "Continue?" dialog will be displayed.



Save Formatting on Forms Dialog

- ▶ To save your cell changes permanently, click on the [Ok] button. This will modify the Form Definition File, but the original form will be backed up automatically. Check the [Tell Me How Tutorial](#) for more information.

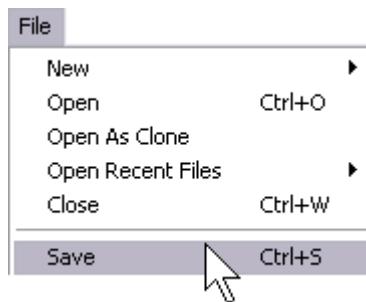
### 3.1.6 Save

#### The Save Command

Use this command to save reports that are open in the [Workspace](#).

#### Saving Reports

- ▶ To save a report:



1. Click on the [File menu](#) title in the [menu bar](#).
2. Click on Save (or use the [Ctrl+S](#) keys).

- ▶ The report file will be saved, overwriting its original version.

- ▶ If this is a New [Container](#), a file browser window will pop up. See the [Save As](#) section for instructions on how to proceed.

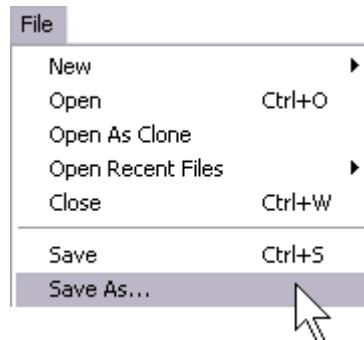
### 3.1.7 Save As

#### The Save As Command

Use this command to save a report with a new name, or in a different location from the original.

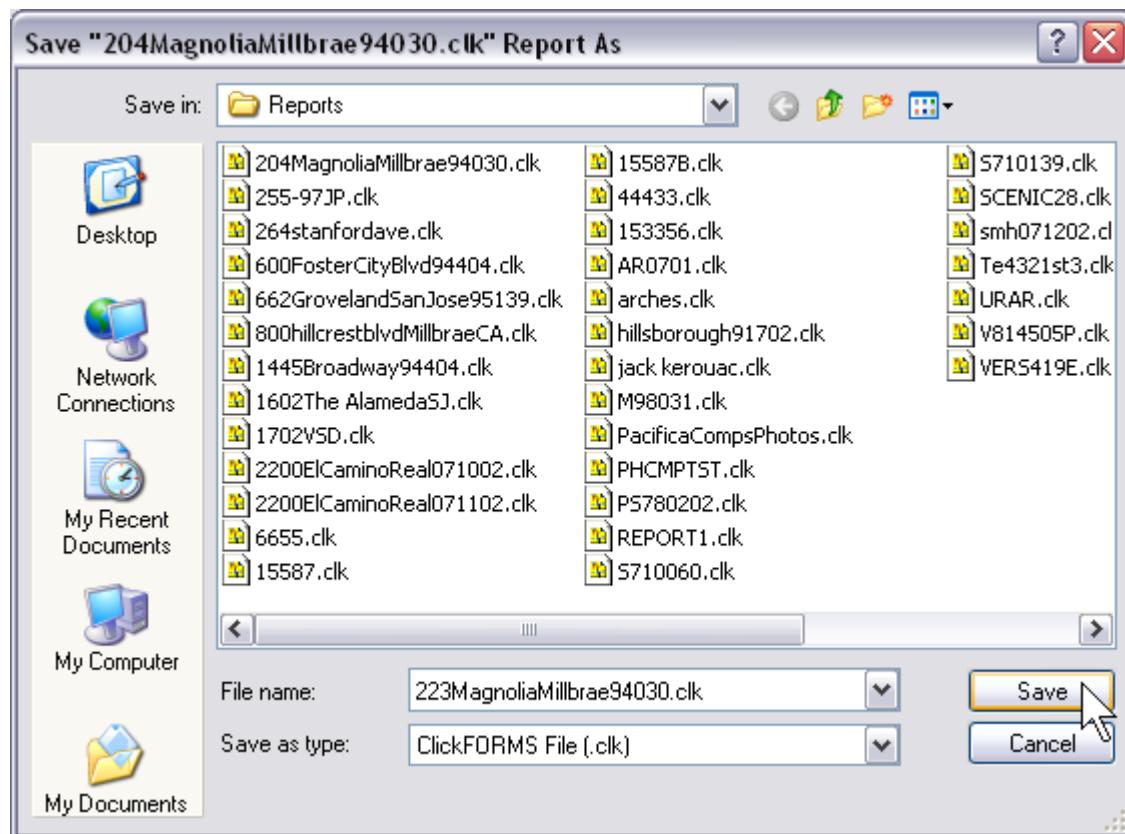
#### Saving Reports As Different Files

- To save a report as a different file from the original or to a different location:



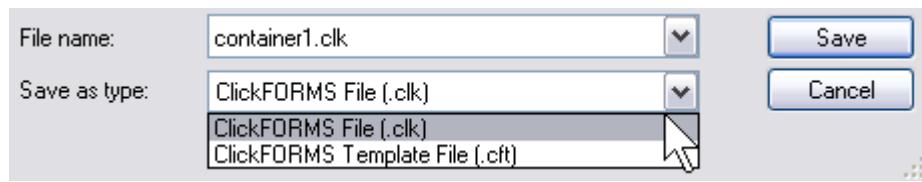
1. Click on the [File menu](#) title in the [menu bar](#).
2. Click on "Save As...".

The Save "Report Name" As dialog will be displayed.



The Save Report As Dialog

2. Enter a new name into the File name box.
3. Select File or Template File from the Save as type menu



Select File or Template in Save as Type Menu

1. Select a location from the Save in menu.
2. Click on the [Save] button to save the new file.

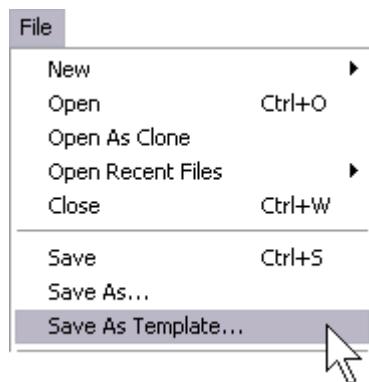
### 3.1.8 Save As Template

#### The Save As Template Command

Use the command to save reports as customized, time-saving templates that can be applied when opening a new report. Templates preserve the contents, page order, cell text and graphics that were in the original report. They can be accessed for display and selection from the Select Template dialog.

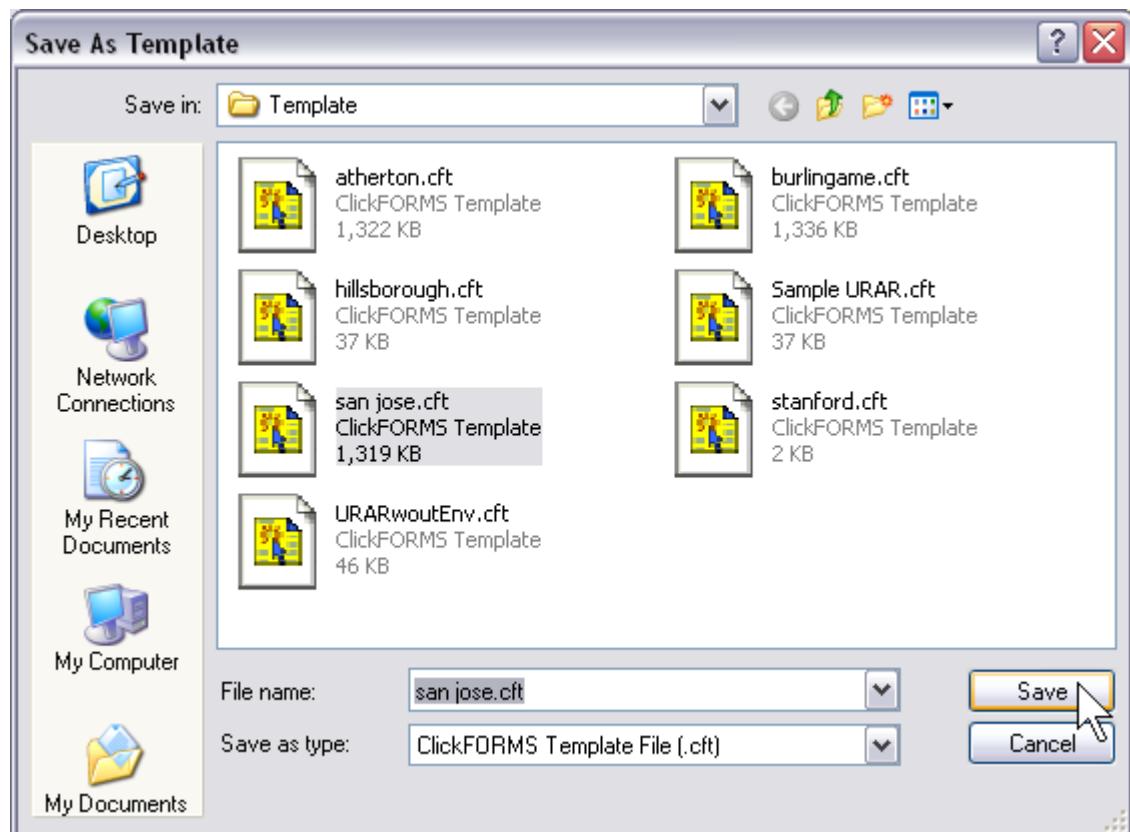
#### Saving Reports As Templates

- ▶ To save a report as a template:



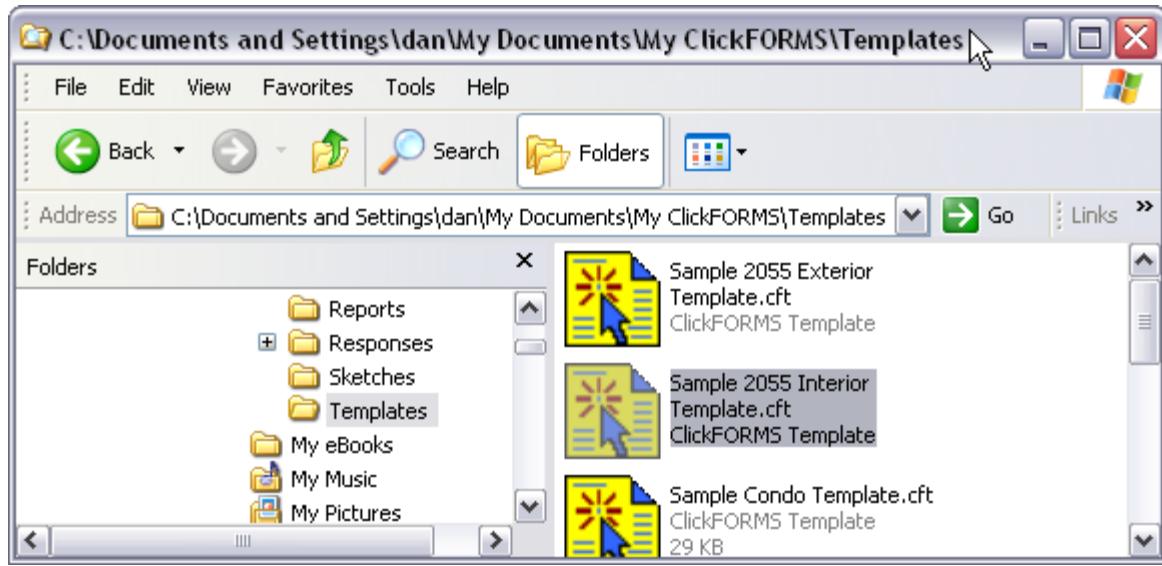
1. Click on the File menu title in the menu bar.
2. Click on "Save As Template...".

- ▶ The Save As Template dialog will be displayed.



The Save As Template Dialog

3. Enter a new name into the File name.
4. Select the location or directory.
5. Click on the [Save] button to save the file.

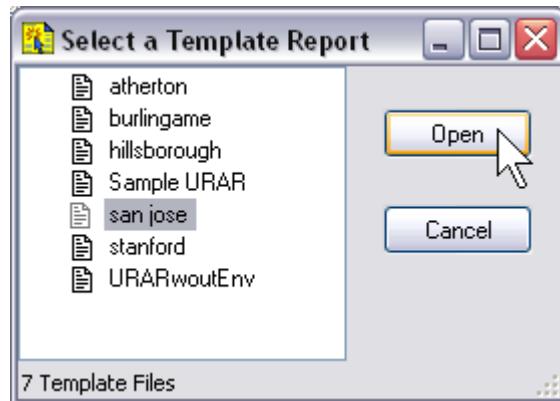


Template Directory

► The file will be automatically saved into the Template folder with a .cft extension.

To View Your New Template

- ▶ Open a [New Template](#)



The Select Template Dialog

- ▶ The [Select Template](#) dialog will contain the name of your new [Template](#).

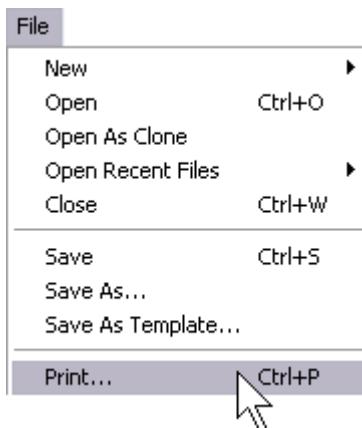
### 3.1.9 Print

#### The Print Command

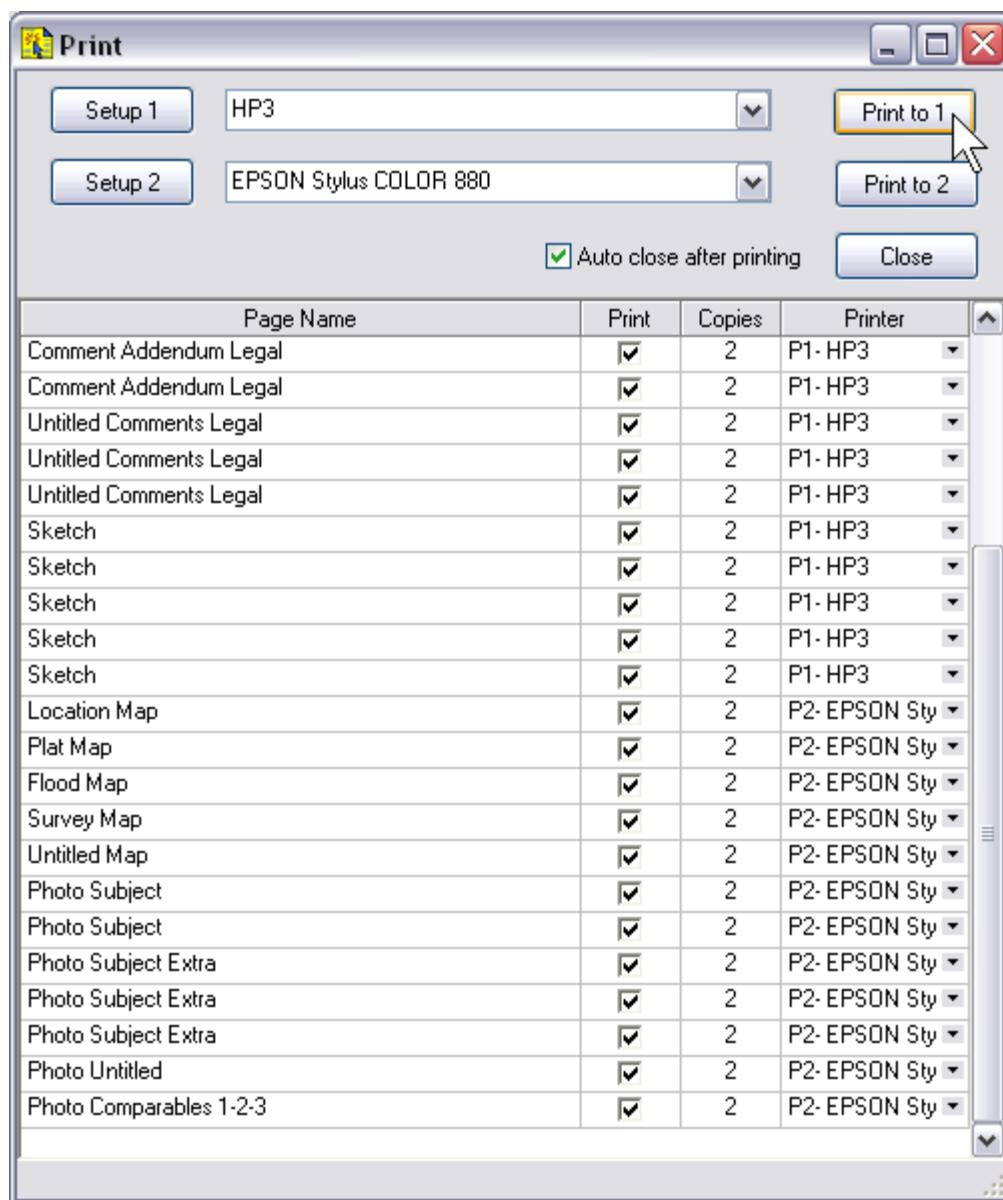
Use this command to print the documents in a selected report.

#### Printing Reports

- To print a report:



1. Click on the File menu title in the menu bar.
2. Click on "Print..." (or use the Ctrl+P keys).
3. The Print dialog will be displayed and you may setup each of your destination printers, if necessary.
4. Select the documents to be printed, or ignored, by checking or de-selecting the boxes in the Print column.
5. In the Copies column, type the number of copies to be printed of specific pages into each respective row.
6. Select the printer(s) that you will print the report documents to from the Setup 1/Setup 2 drop-down menus.



The Print Dialog

7. Click on the [Print to 1] button and/or [Print to 2] button to start printing.

► Photos may be printed to a high resolution laser printer and forms to a standard black and white ink jet model. If there is no printer available in the Setup 1 or Setup 2 menu, then the driver has not been installed.

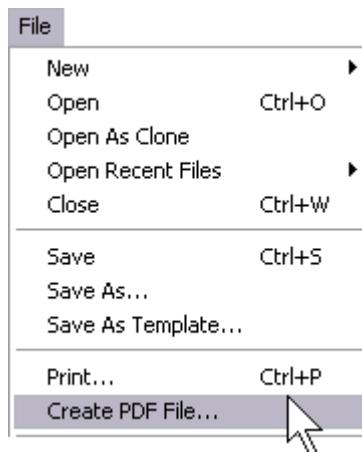
### 3.1.10 Create PDF File

#### The Create PDF File Command

Use this command to convert reports to Adobe Acrobat "Portable Document Format".

#### Creating PDFs

- ▶ To create a PDF:



1. Click on the File menu title in the menu bar.
2. Click on "Create PDF File...".

#### Options

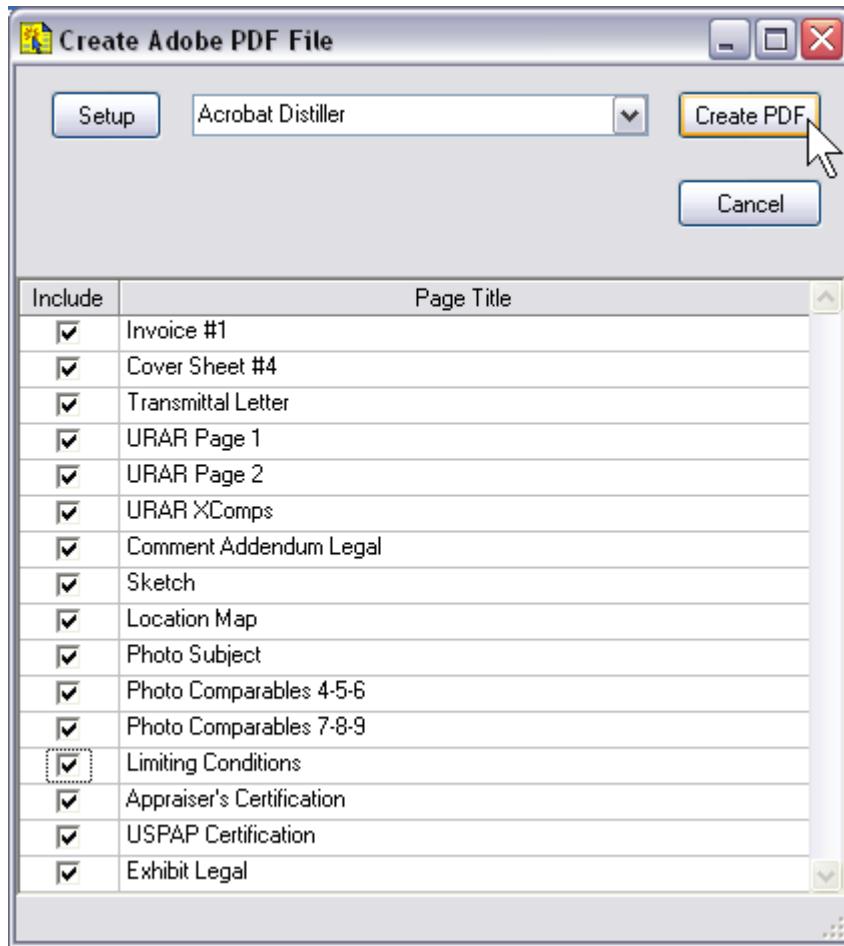
- ▶ Adobe Driver
- ▶ Built-in Driver

### 3.1.10.1 Adobe Driver

#### Create PDF With Adobe Driver

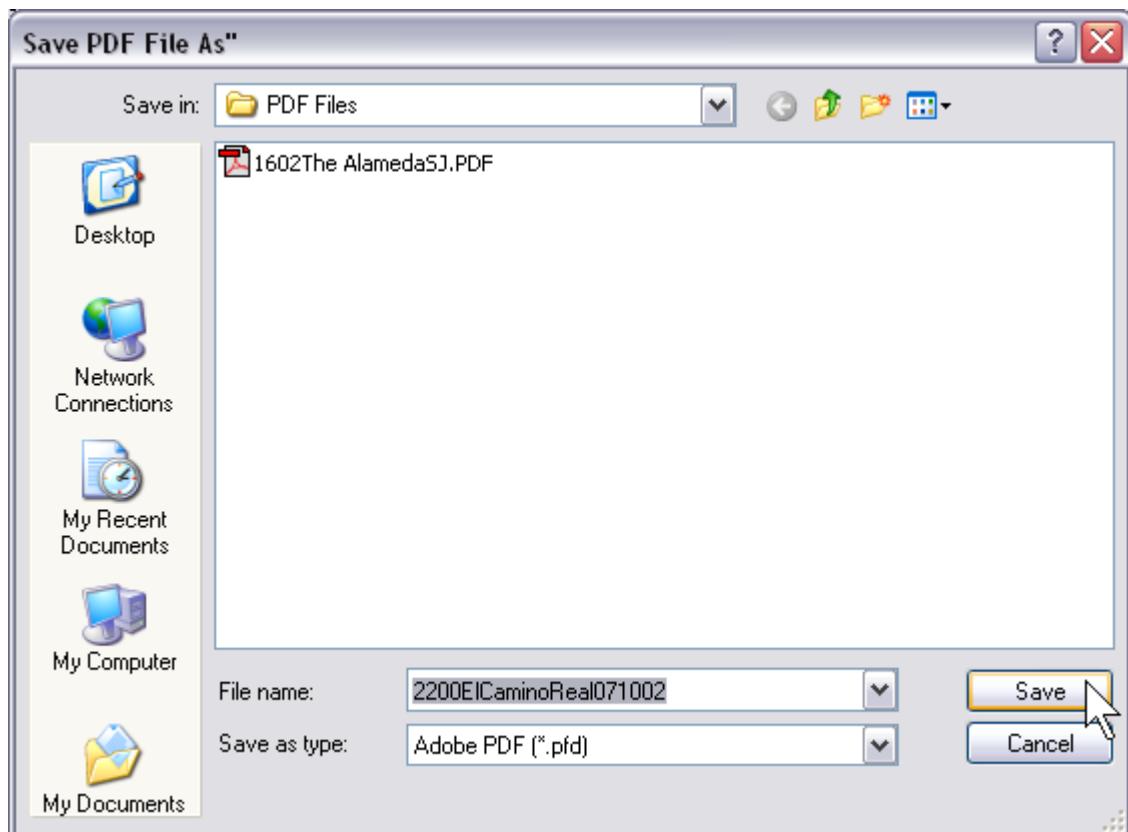
1. Click on the File menu title in the menu bar.
2. Click on "Create PDF File...".

► If you are using the Adobe Acrobat Distiller driver, the dialog below will be displayed:



The Create PDF File (w/Adobe Driver) Dialog

3. When the Create Adobe PDF File dialog is displayed, select Acrobat Distiller from the drop-down menu.  
► If you do not have Adobe Distiller, you will need to install it first. Go to: <http://www.adobe.com>
4. Select the documents to be converted, or ignored, by checking or de-selecting the boxes in the "Include" column.
5. You can adjust Acrobat Distiller's settings by clicking on the [Setup] button, if necessary.
6. Click on the [Create PDF] button to proceed.



The Save PDF File As Dialog

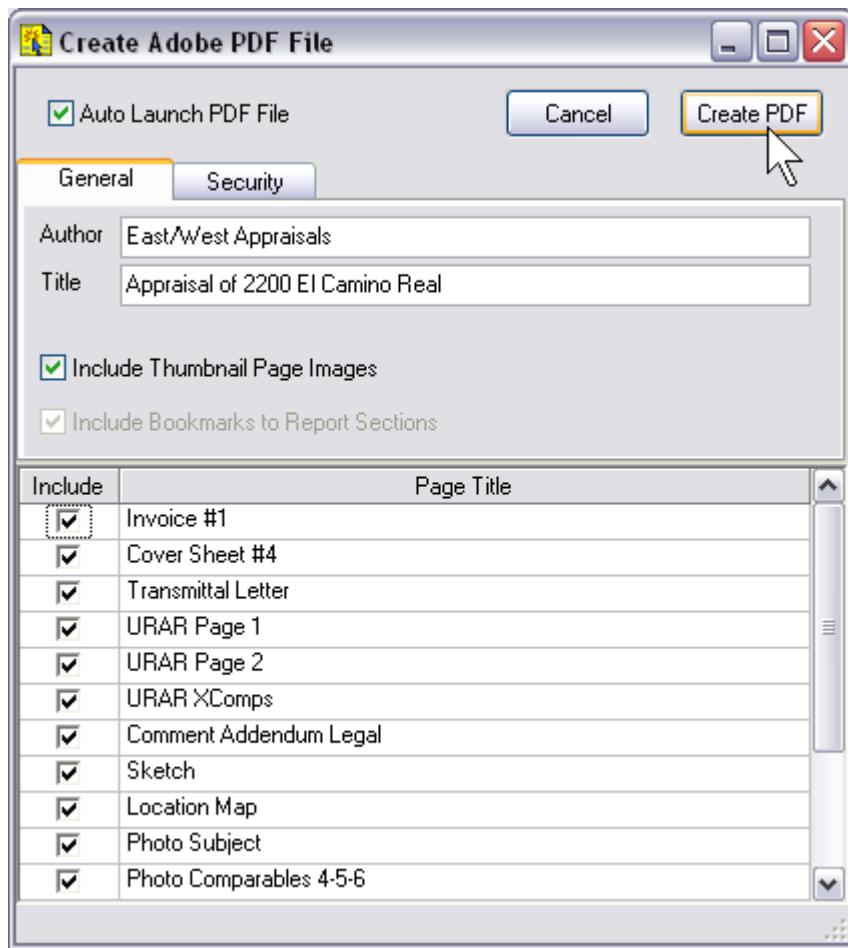
7. Select the destination for saving the file in the Save PDF File As dialog box.
8. Modify the file name, if necessary, and click on the [Save] button to proceed.

### 3.1.10.2 Built-in Driver

#### Create PDF With Built-In Driver

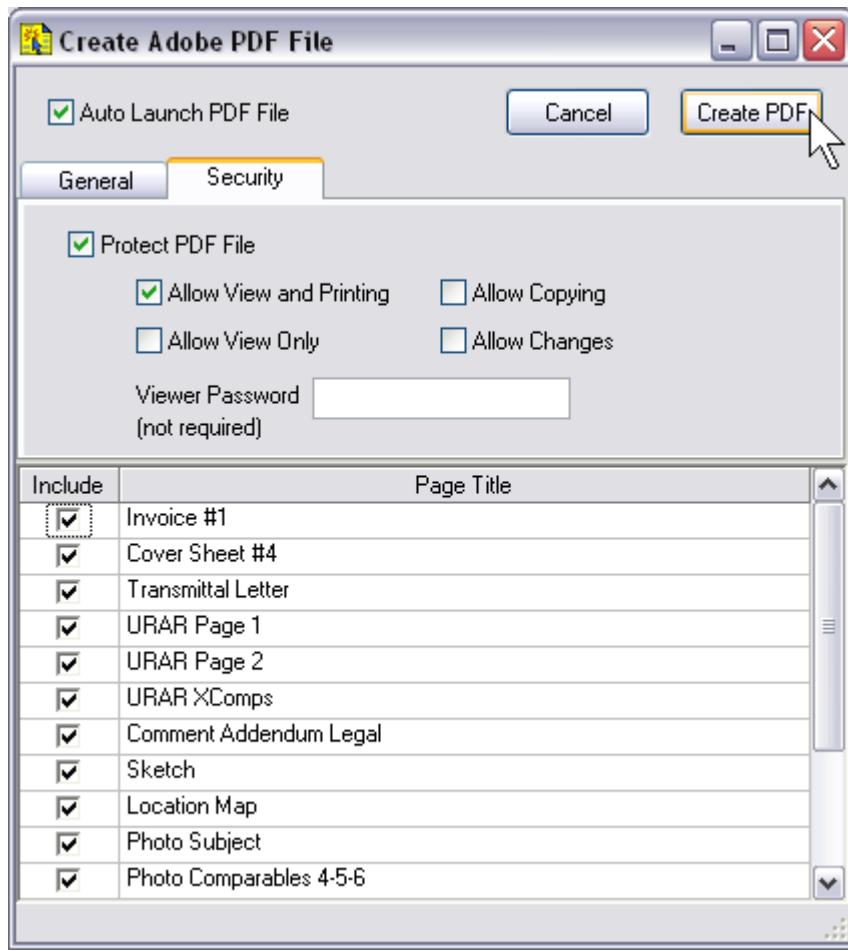
1. Click on the File menu title in the menu bar.
2. Click on "Create PDF File...".

► If you are using the Built-In PDF driver, the dialog below will be displayed:



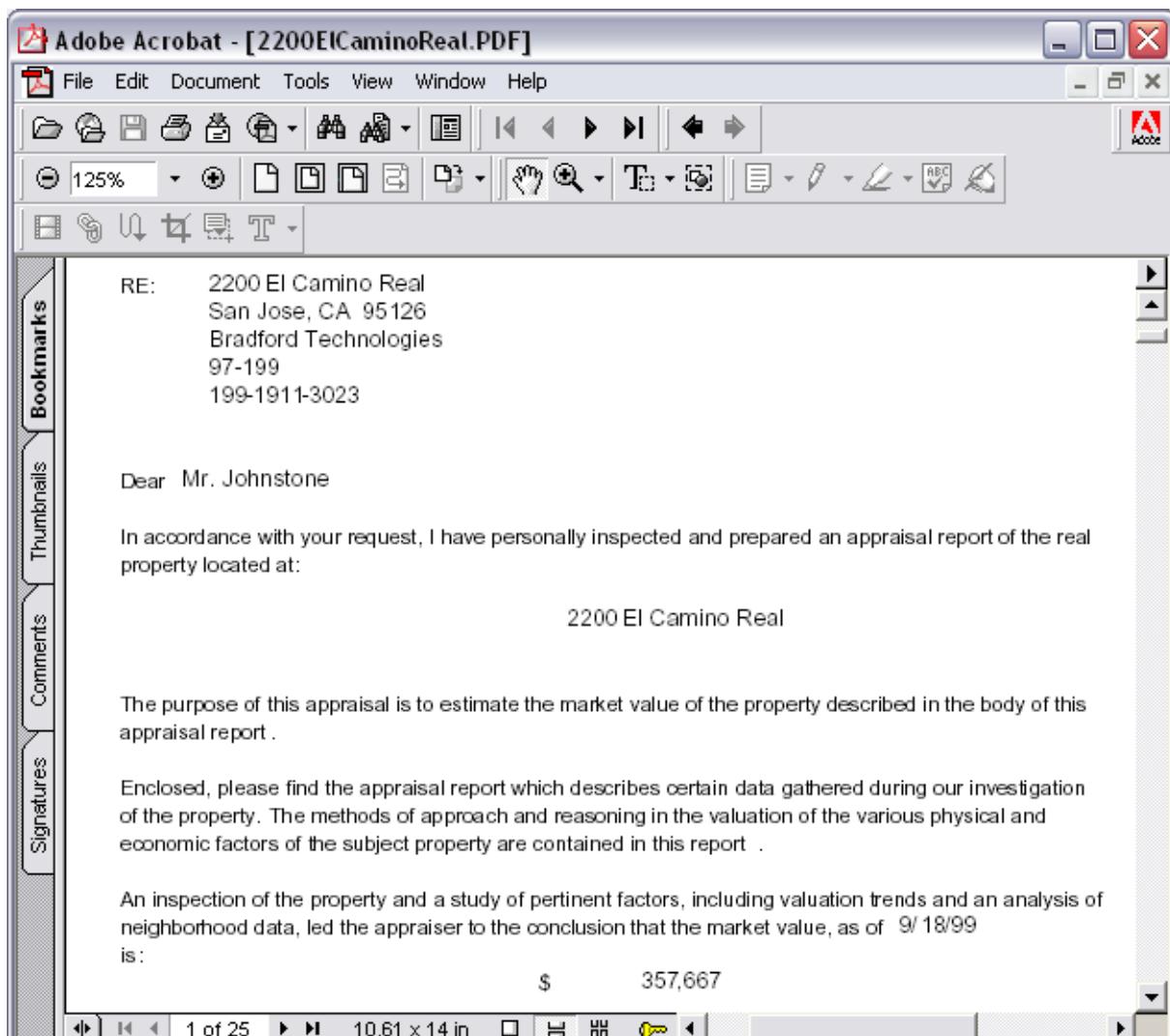
The Create Adobe PDF File (w/Built-In Driver) Dialog

1. Fill in the Author and Title boxes.
2. Click on the Security Tab to proceed.



The Security Tab Page

3. Select PDF security options for the document you will be generating.
4. Click on the [Create PDF] button to proceed.
5. Select the destination for saving the file in the Save PDF File As dialog box.
6. Modify the file name, if necessary, and click on the [Save] button to proceed.



- Your PDF file will be generated, and can be viewed with Adobe Acrobat or Acrobat Reader.

### 3.1.11 Send To

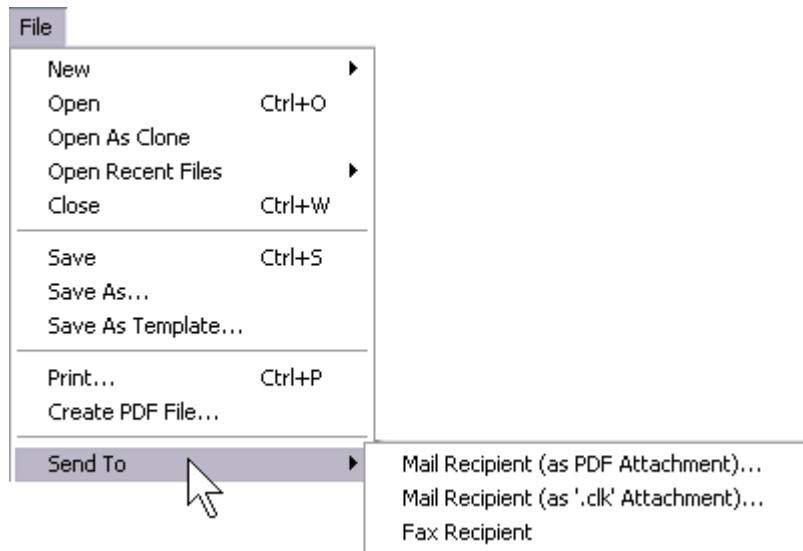
#### Send To Menu Commands

The Send To menu offers three options for sending reports:

- [Mail Recipient as PDF Attachment](#)
- [Mail Recipient \(as ".clk" attachment\)](#)
- [Fax Recipient](#)

#### Accessing the Send To Menu

► To access the Send To menu:



1. Click on the [File menu](#) title in the [menu bar](#).
2. Move the mouse cursor down to Send To.

### 3.1.11.1 Mail Recipient...

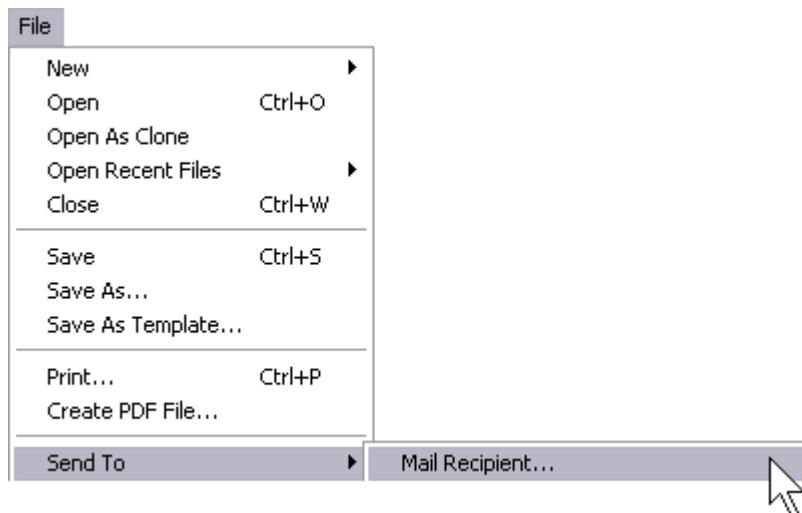
#### The Send To Mail Recipient Command

Use this command to send an email from within the program.

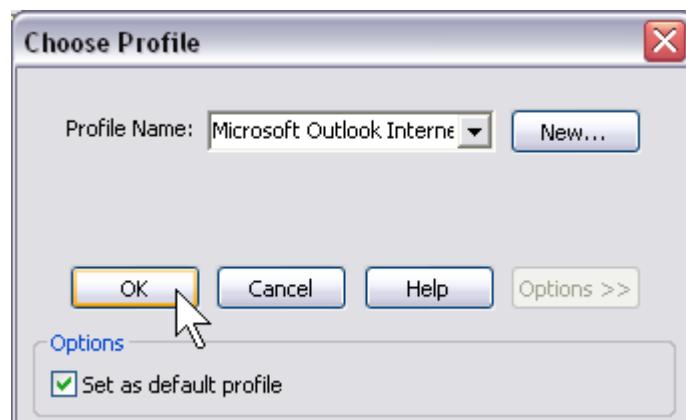
- ▶ To use this command, disable the [Built-in PDF driver](#) in [Application Preferences](#).

#### Sending Email

- ▶ To send an email:

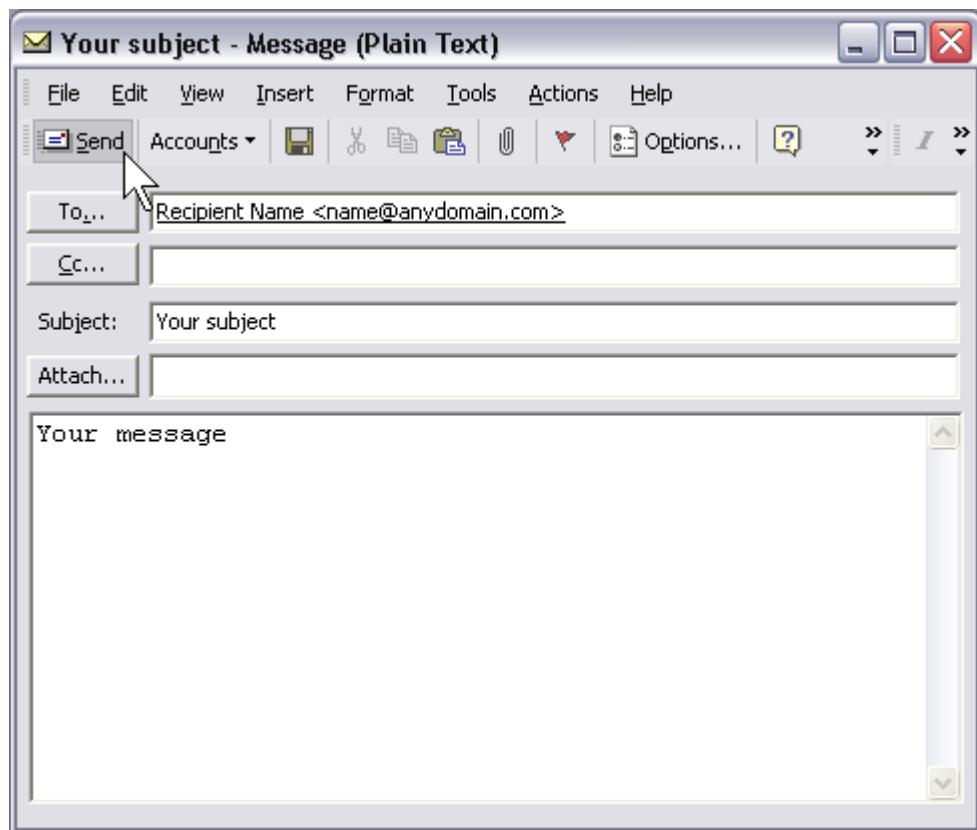


1. Click on the [File menu](#) title in the [menu bar](#).
2. Move the mouse cursor down to the Send To menu.
3. Click on "Mail Recipient ...".
4. You may be prompted to choose your email profile.



Choose Profile Dialog

- ▶ Fill out the details of the message.



Blank Email Message Window

1. Select the recipient's email address by clicking on the [To...] button or type it in.
2. Type your subject and message.
3. Click on the [Send] button.

### 3.1.11.2 Mail Recipient as PDF Attachment

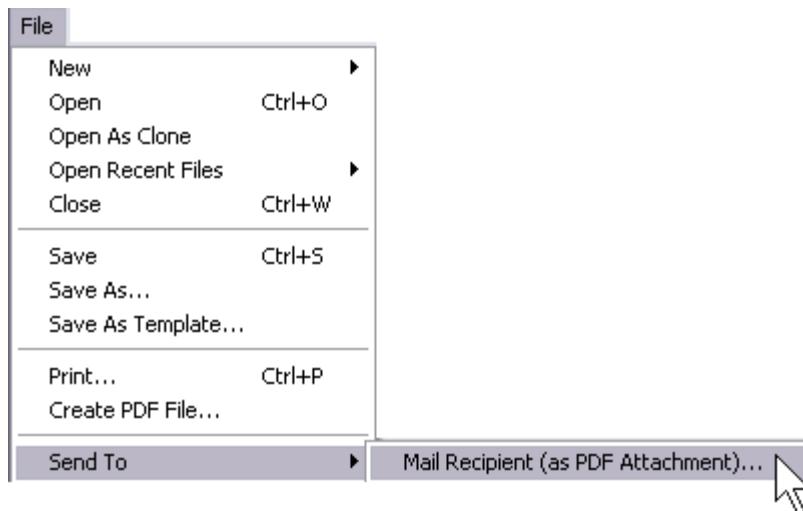
#### The Send To Mail Recipient [as PDF Attachment] Command

Use this command to send a report by email as a .pdf file attachment.

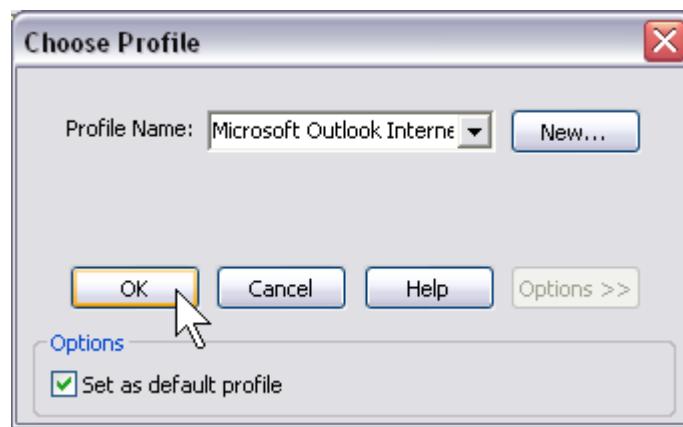
- ▶ To use this command, enable the [Built-in PDF driver](#) in [Application Preferences](#).

#### Sending Reports as PDFs by Email

- ▶ To send the report as a PDF attachment:



1. Click on the [File menu](#) title in the [menu bar](#).
2. Move the mouse cursor down to the [Send To](#) menu.
3. Click on "Mail Recipient [as PDF Attachment]...".
4. You may be prompted to choose your email profile.



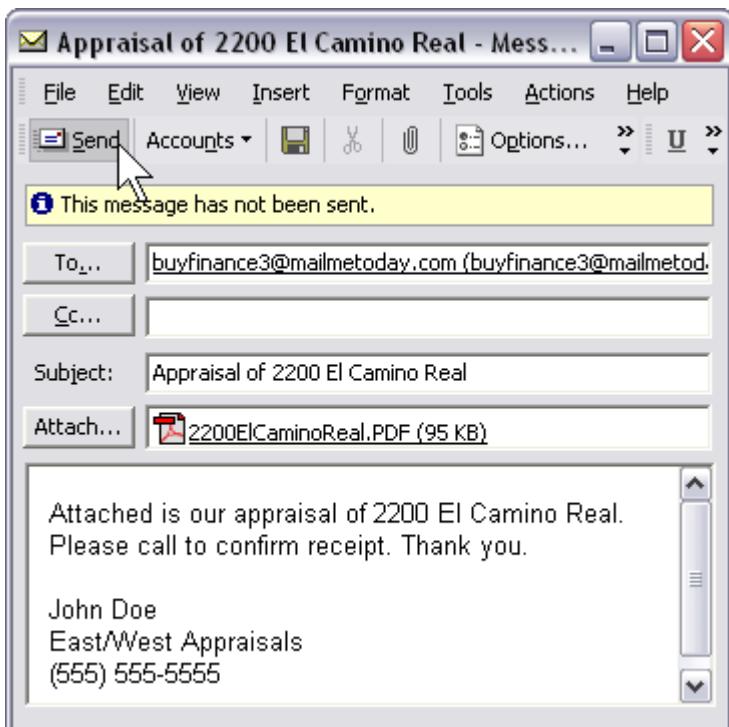
Choose Profile Dialog

- ▶ The program will convert the report to Adobe Acrobat Portable Document Format and save it locally.



The PDF Files Directory

- An untitled email window will open with the report included as a .pdf attachment.



Queued Email With PDF Report Attached

1. Select the recipient's email address by clicking on the [To...] button or type it in.
2. Type your subject and message.
3. Click on the [Send] button.

### 3.1.11.3 Mail Recipient as .clk Attachment

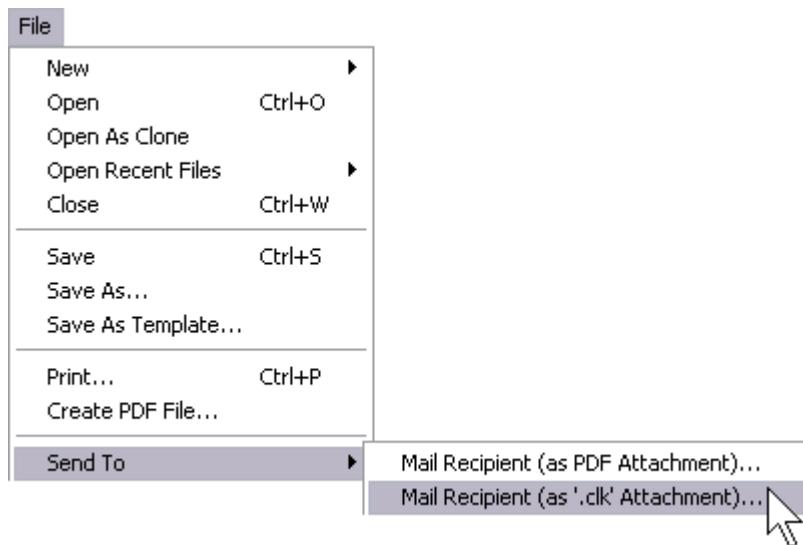
#### The Send To Mail Recipient [as .clk Attachment] Command

Use this command to send a report by email as a .clk file attachment.

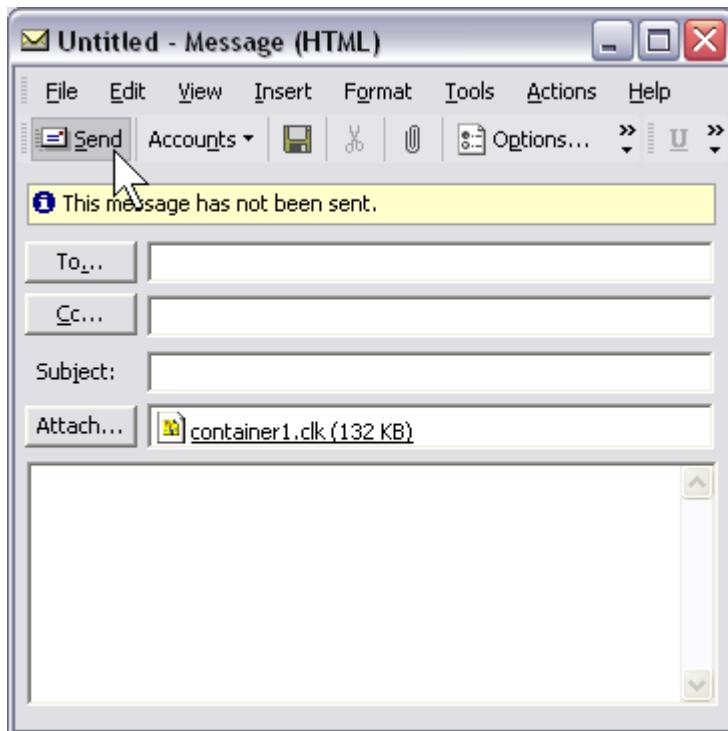
- A .clk file is the name of report files that are created with this software.

#### Sending Reports by Email

- To send the report as a .clk email attachment:



1. Click on the File menu title in the menu bar.
2. Move the mouse cursor down to the "Send To" menu.
3. Click on "Mail Recipient [as '.clk' Attachment]...".



Untitled Email With .clk File Attached

► An untitled email window will open with the currently selected report included as a .clk attachment.

1. Select the recipient's email address by clicking on the [To...] button or type it in.
2. Type your subject and message.
3. Click on the [Send] button.

### 3.1.11.4 Fax Recipient

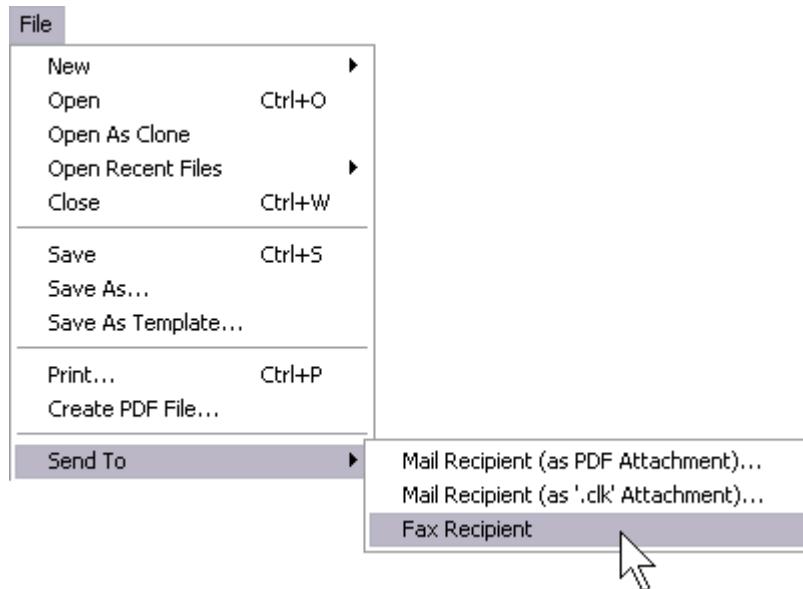
#### The Send To Fax Recipient Command

Use this command to send the report by fax.

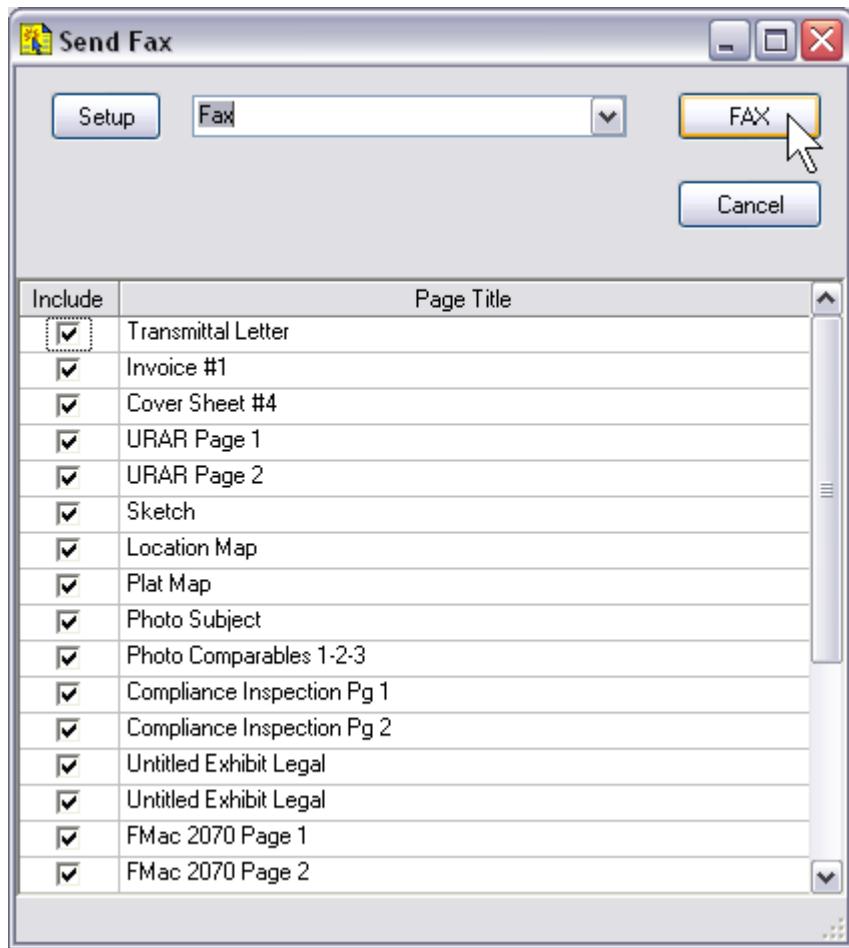
- A fax application (i.e. Microsoft Fax) must be installed to use this command.

#### Sending To a Fax Recipient

- To send the report by fax:



1. Click on the File menu title in the menu bar.
2. Move the mouse cursor down to the "Send To" menu.
3. Click on Fax Recipient.



The Send Fax Dialog

► When the Send Fax dialog is displayed:

1. Select your fax application from the Setup drop-down menu.
2. Check the boxes in the Include column to select the documents to fax by page title.
3. Click on the [FAX] button to send.

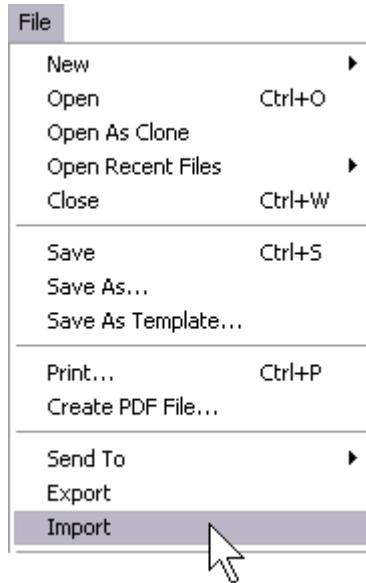
### 3.1.12 Import

#### The Import Command

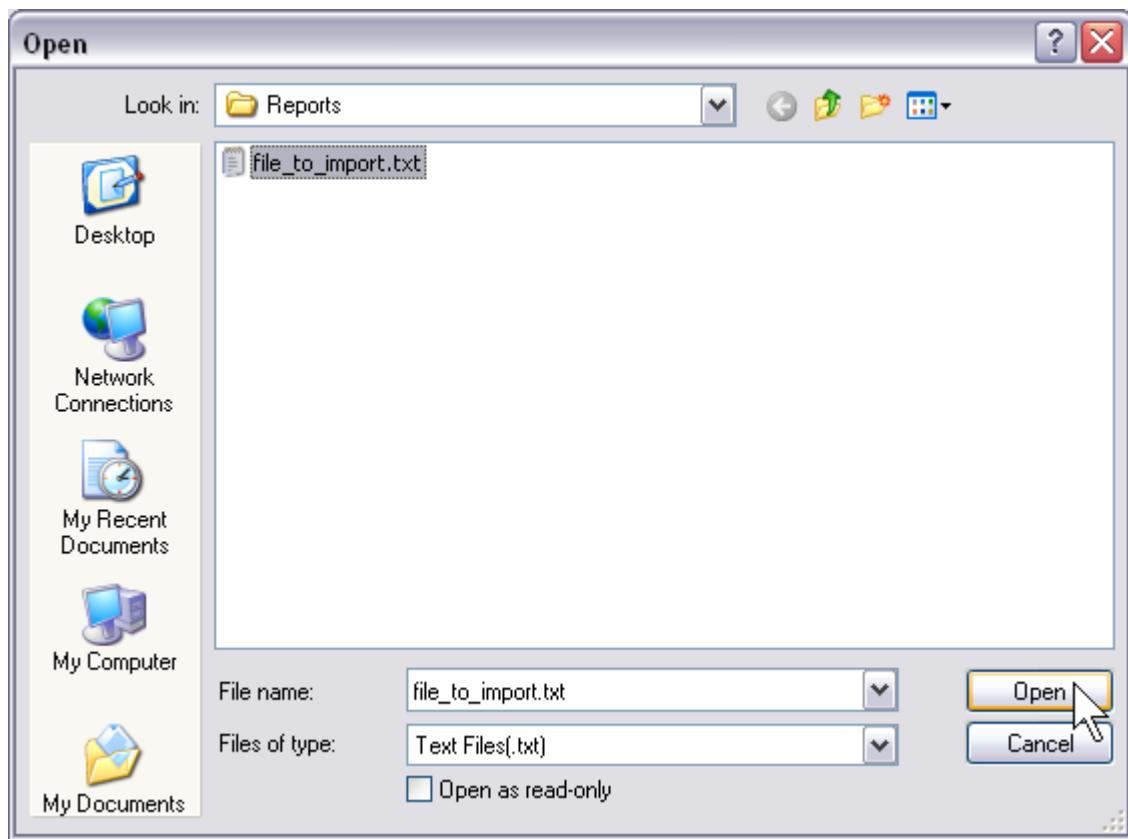
Use this command to import data from a text file to populate the cells in an open report.

#### Importing Data

- To import data:



1. Click on the File menu title in the menu bar.
2. Click on Import to launch the Open dialog.



Open Dialog With File to Import

1. Use the Look in drop-down list box to browse to the location where the .txt file containing the data to be imported is located.
2. Click on the file icon to select that file to be imported.
3. Click on the [Open] button to import the data.

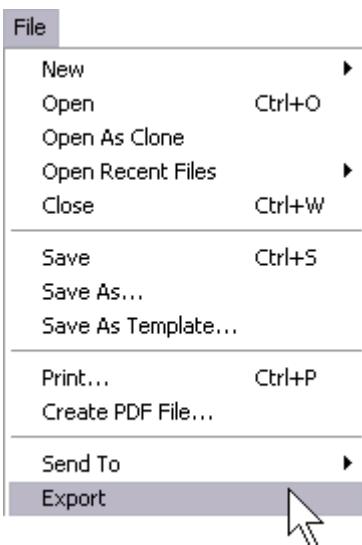
### 3.1.13 Export

#### The Export Command

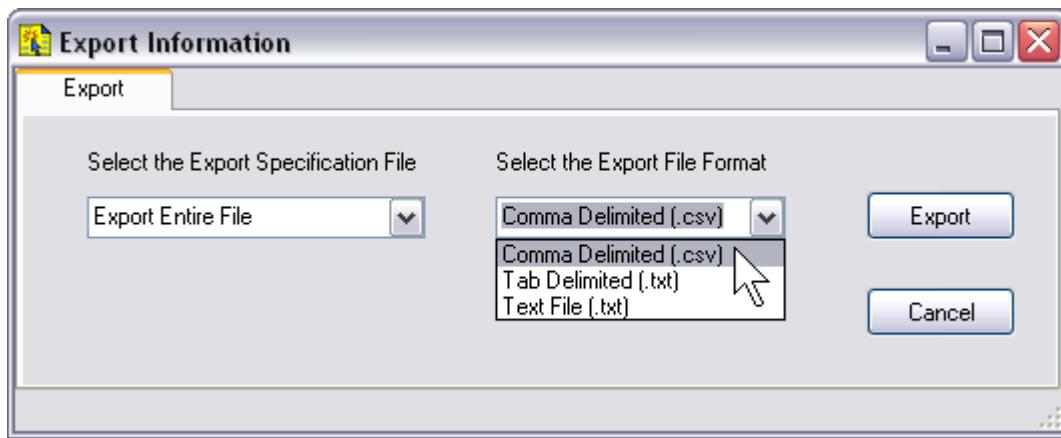
Use this command to export report cell data (text and numbers) to be saved as a flat text file.

#### Exporting Reports

- To export a report:



1. Click on the File menu title in the menu bar.
2. Click on Export.



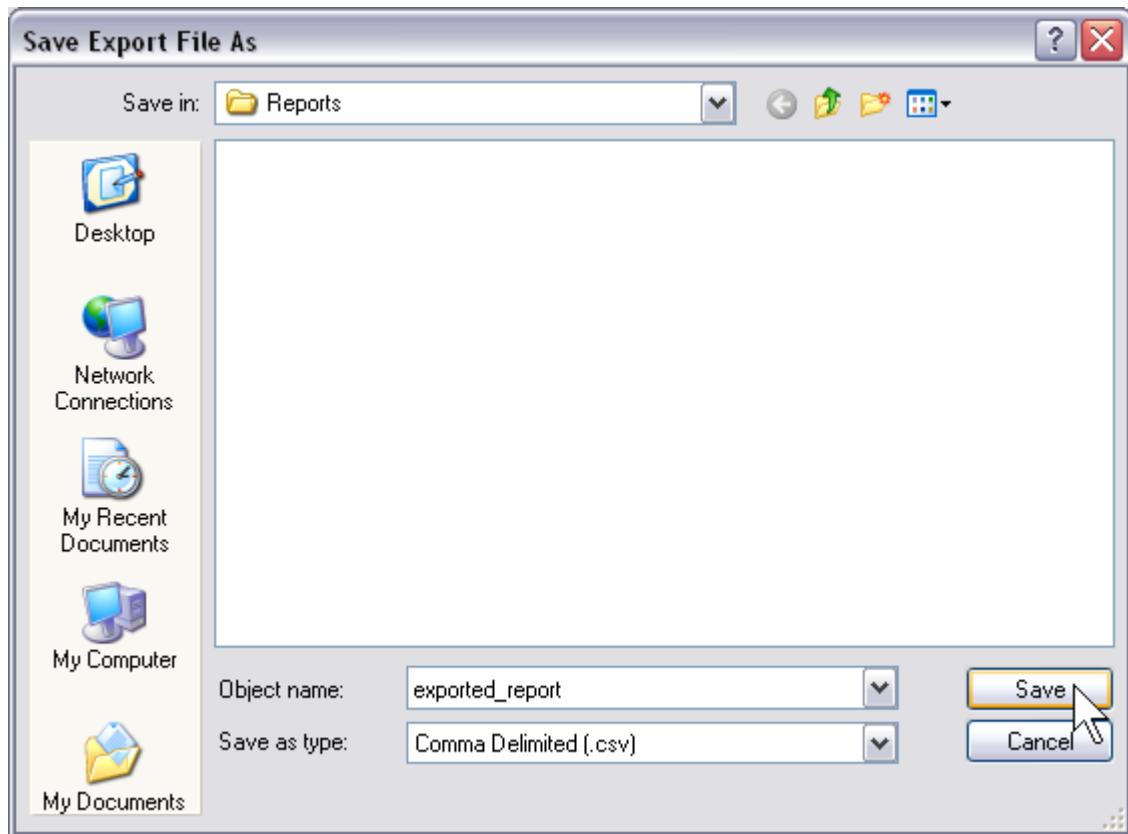
The Export Information Sheet

3. When the Export Information sheet is displayed, choose a selection from the Export File Format drop-down list.



The Export Button

4. Click on the [Export] button to launch the Save Export File As dialog.



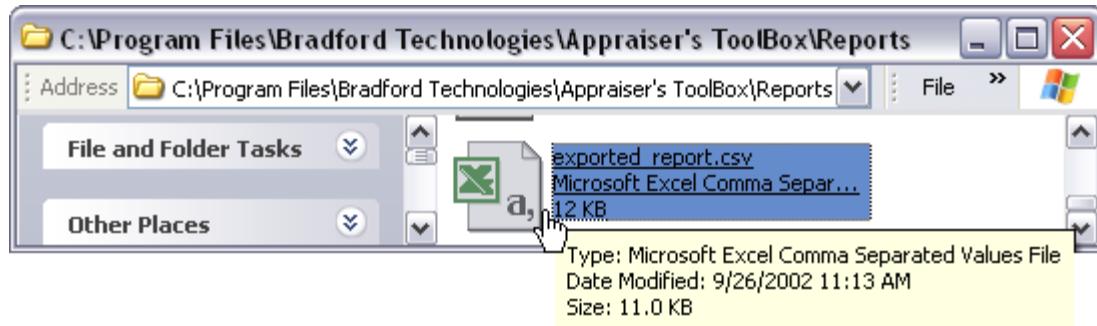
The Save Export Report As Dialog

5. Select the location where the file will be saved to from the Save in list box.
6. Type the name of the file in the Object name box.

### Validating Data

You can check the information that has been exported by opening the new file.

- Browse to the location where you have saved the exported file.



Exported Comma Separated Values Report

- Click on the file to launch the application associated with the file extension.

Microsoft Excel - exported_report.csv			
	A	B	C
1426	1602 The Alameda		
1427	San Jose		
1428	350	0	
1429			
1430	Suburban		
1431	Cul-de-sac		
1432	23		
1433	Good		
1434	7		
1435	3		
1436	3		
1437	6	233	
1438	Cent./Central		
1439	3 Car Garage		
1440	Deck	Patio	
1441	Fence	pool	
1442	Average		

Exported Launched in Excel

- The file will open and you can view the information that has been exported.

### 3.1.14 Properties

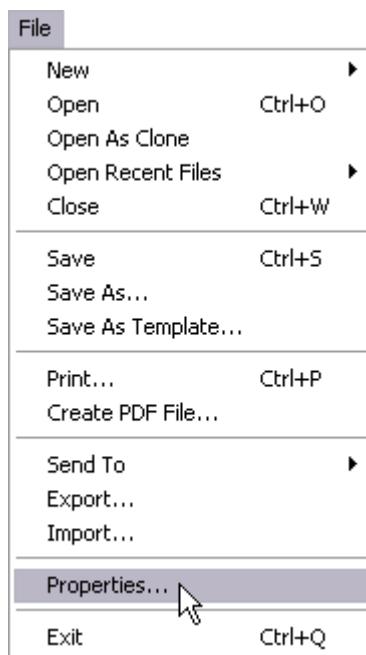
#### The Properties Command

Use this command to View, Update and Add the Properties of a Report.

#### Opening the Properties Window

► To View the Report Properties:

1. Click on the [File menu](#) title in the [menu bar](#).
2. Click on Properties.



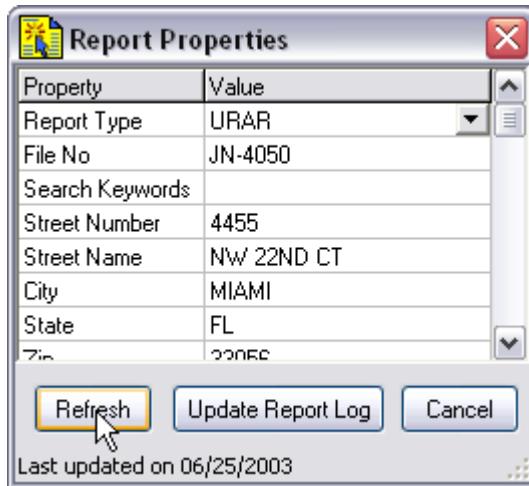
The File Menu

3. The Report Properties Window will be Displayed.



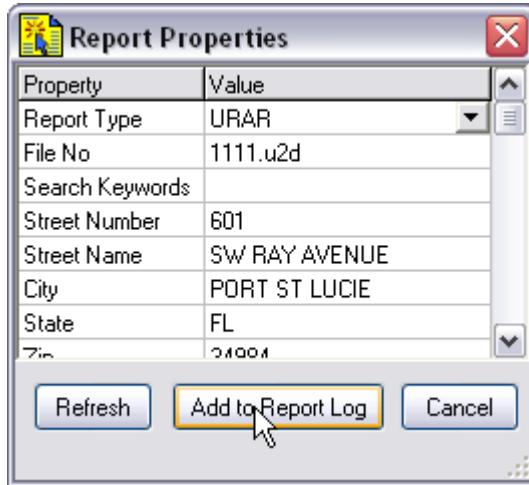
The Report Properties Window

4. Click on [Refresh] if you have changed Report information and wish to Refresh it and Click on [Update Report Log] to Update this changed Report in the Reports List.



The Report Properties Window

5. Click on [Add to Report Log] if you want to Add this Report to the Reports List.



The Report Properties Window

- View Additional Information related to this Topic at [Reports List](#)

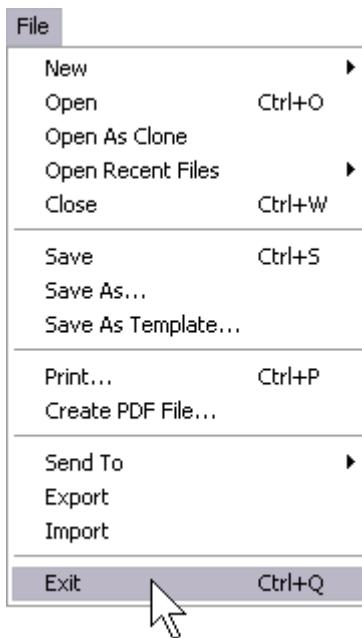
### 3.1.15 Exit

#### The Exit Command

Use this command to quit the application.

#### Exiting the Application

- ▶ To shut down ClickForms:



1. Click on the File menu title in the menu bar.
2. Click on Exit (or use the Ctrl+Q keys).

▶ If you have made changes to the report but have not saved your work, you will be prompted to do so. You can also close the application with the following commands:

- Depress the [Ctrl] and [Q] keys, simultaneously.
- Click on the [X] button in the top right-hand corner of the interface.

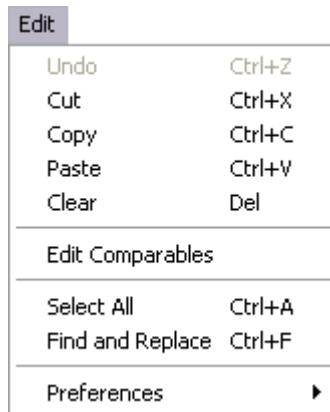
## 3.2 The Edit Menu

### Edit Menu Commands

This menu displays a list of commands for authoring, proofing and modifying the contents of a report, and for setting [preferences](#).

### Accessing the Edit Menu

- ▶ To access the Edit Menu:



- ▶ Point your cursor to the Edit menu title in the [menu bar](#) and click once.

### 3.2.1 Undo

#### The Undo Command

Use this command to step backward, cancelling the last change that was made to the cell text in an open report.

#### Accessing the Undo Command

- ▶ To access the Undo command:



1. Click on the [Edit menu](#) title in the [menu bar](#).
2. Click on Undo (or use the [Ctrl+Z](#) keys).

- ▶ The textual change will roll back one step.

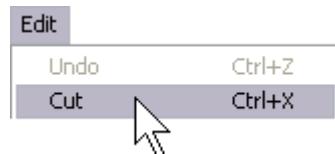
### 3.2.2 Cut

#### The Cut Command

Use this command to cut cell text and images from forms in an open report.

#### Using the Cut Command

- ▶ Accessing the Cut command:



1. Block the text that you would like to cut.
2. Click on the [Edit menu](#) title in the [menu bar](#).
3. Click on Cut (or use the [Ctrl+X](#) keys).

- ▶ The blocked text or image will be cut.

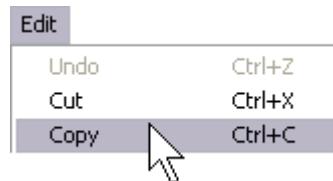
### 3.2.3 Copy

#### The Copy Command

Use this command to copy text or images into a cell in an open report.

#### Using the Copy Command

► Accessing the Copy command:



1. Block the text that you would like to copy.
2. Click on the [Edit menu](#) title in the [menu bar](#).
3. Click on Copy (or use the [Ctrl+C](#) keys).

► The blocked text or image will be copied to your system clipboard.

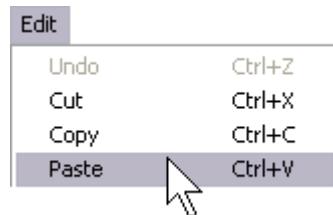
### 3.2.4 Paste

#### The Paste Command

Use this command to paste text or images into a cell in an open report.

#### Using the Paste Command

► Accessing the Paste command:



1. Block and copy the text that you want to paste.
2. Click in your report on the cell you want to paste into.
3. Click on the [Edit menu](#) title in the [menu bar](#).
4. Click on Paste (or use the [Ctrl+V](#) keys).

► The text or image will be copied from your system clipboard and pasted into the report.

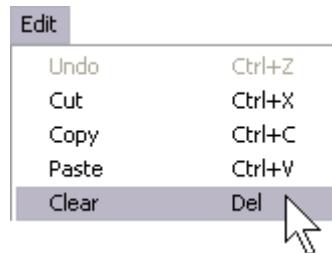
### 3.2.5 Clear

#### The Clear Command

Use this command to delete text or images from a cell an open report.

#### Using the Clear Command

► Accessing the Clear command:



1. Block the text that you would like to delete.
2. Click on the Edit menu title in the menu bar.
3. Click on Clear (or use the Del key).

► The blocked text or images will be deleted.

### 3.2.6 Edit Comparables

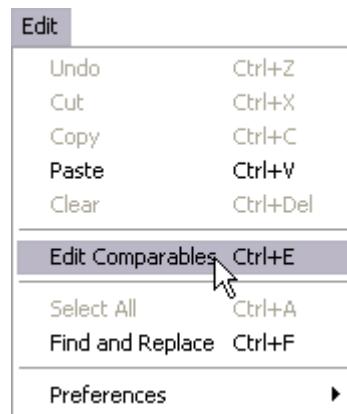
#### The Edit Comparables Command

Use this command to launch a sheet for editing property [Edit Comparables](#) in an open report.

#### Using the Edit Comparables Command

- Accessing the Edit Comparables command:

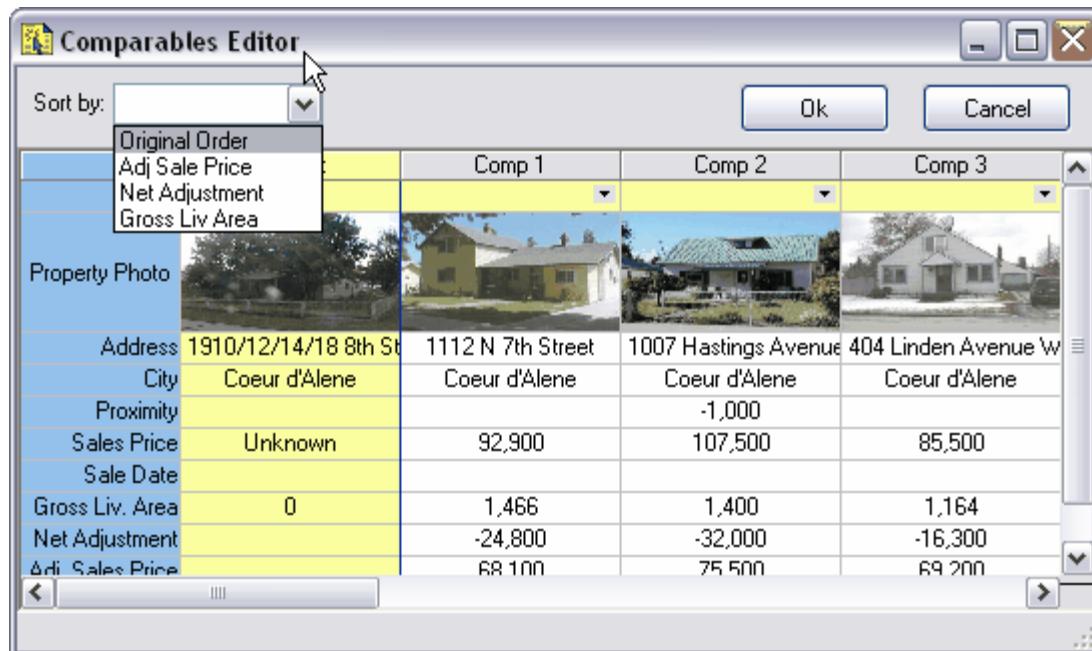
1. Click on the [Edit menu](#) title in the [menu bar](#).
2. Click on Edit Comparables.



The Edit Menu

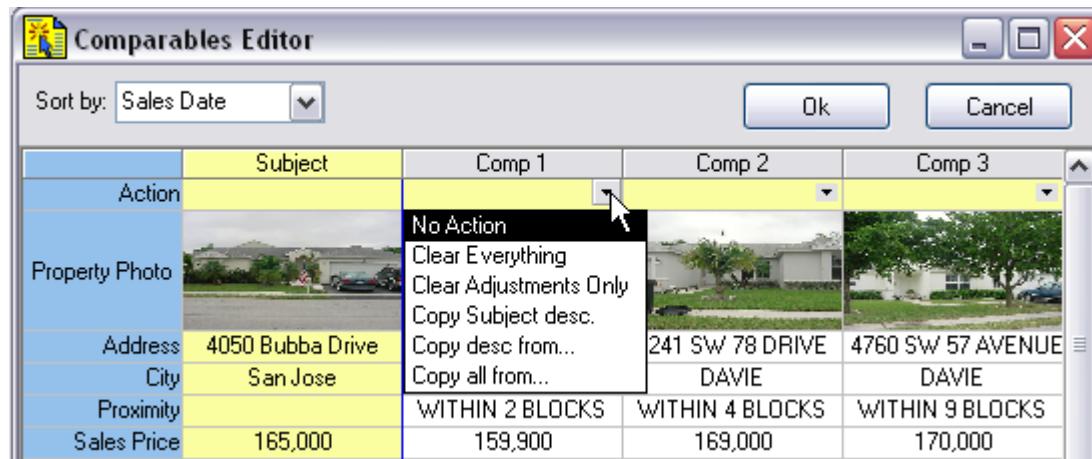
- The Comparable Editor Window will be displayed.

- Sort Comparables by Clicking on the Sort by Down Arrow and selecting the sort option you wish to invoke.



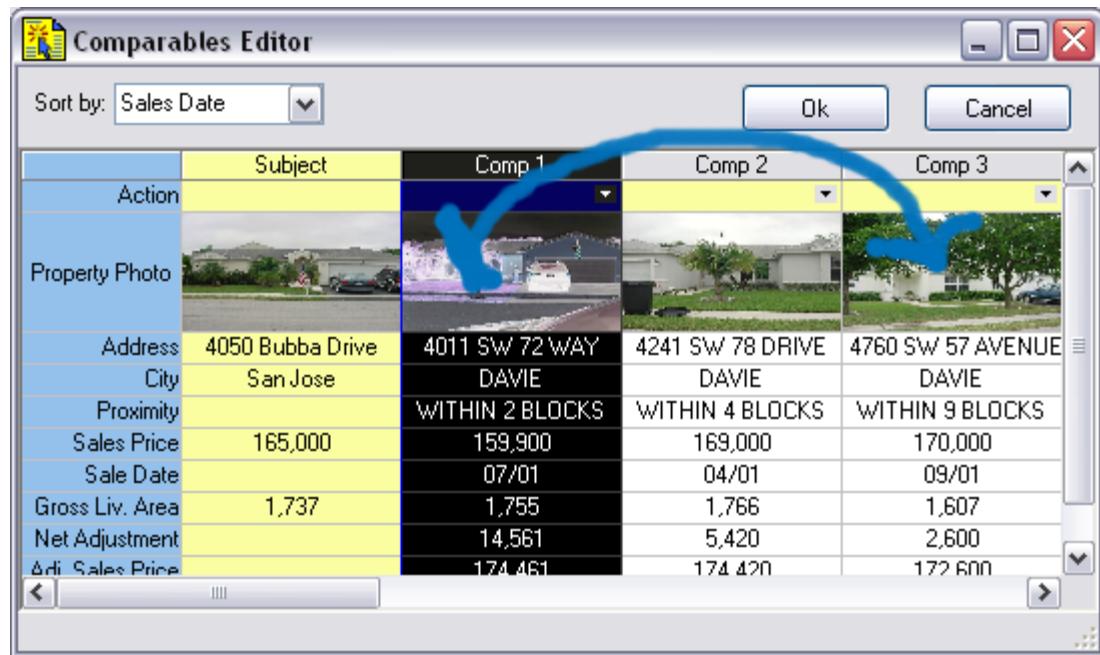
The Comparable Editor Window

- ▶ Edit the Fields of each Comparable by Clicking on the Down Arrow under each Comp Header.
- ▶ When you have finished editing, Click on the [Ok] Button.



The Edit Comparables Window

- ▶ You can Swap Comps by using the Drag and Drag method:
1. Hover your Mouse Pointer over the Comp you wish to select until the Pointer changes to a down arrow, then click, it will turn the entire Comp Black.
  2. Click and Hold while in the Comp you just selected and Drag it to the Comp you wish to Swap it with, release the Mouse Button. You have now Swapped this Comp.



The Edit Comparables Window

► This command is still under development for future update releases of this application.

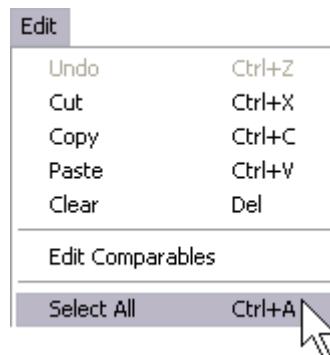
### 3.2.7 Select All

#### The Select All Command

Use this command to select all text in an activated cell.

#### Using the Select All Command

► Accessing the Select All command:



1. Click inside a cell on an open report form to activate it.
2. Click on the [Edit menu](#) title in the [menu bar](#).
3. Click on Select All (or use the [Ctrl+A](#) keys).

► All text in the cell will be selected.

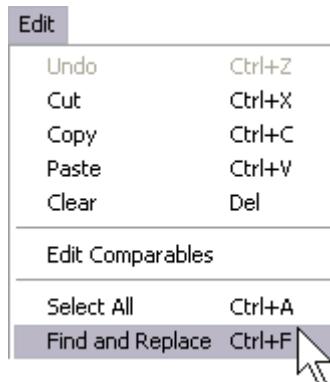
### 3.2.8 Find and Replace

#### The Find and Replace Command

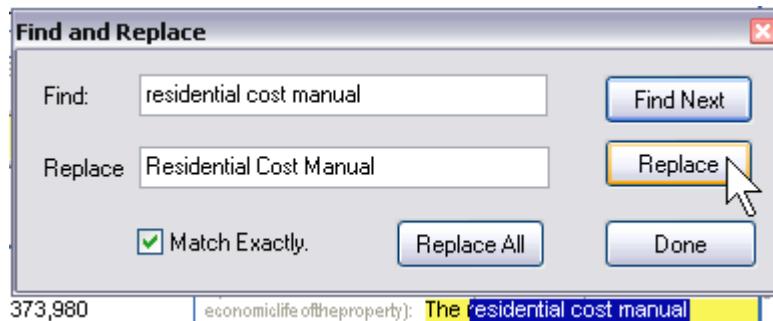
Use this command to search cell text in an open report and replace selected words or phrases.

#### Using the Find and Replace Command

- Accessing the Find and Replace command:



1. Click on a file name in the [Forms Manager](#).
2. Click on the [Edit menu](#) title in the [menu bar](#).
3. Click on Find and Replace (or use the [Ctrl+F](#) keys).



The Find And Replace Dialog

4. When the Find and Replace dialog is displayed, enter the word or phrase to search for in the Find box.
5. In the Replace box, enter the word or phrase that should appear instead.
6. Click on the [Find Next] button to search the page for the word or phrase.
  - Click on the [Replace] button to replace the found word or phrase with your desired alternative.
  - Click on the [Replace All] button to replace all matching words or phrases in a Page or Report.



Replace Notice Dialog

- ▶ The user will be prompted by a "Notice" dialog when all occurrences of the selected words or phrases have been replaced with the new word.
- ▶ Click on the [Ok] button to proceed with your operations.

### 3.2.9 Preferences

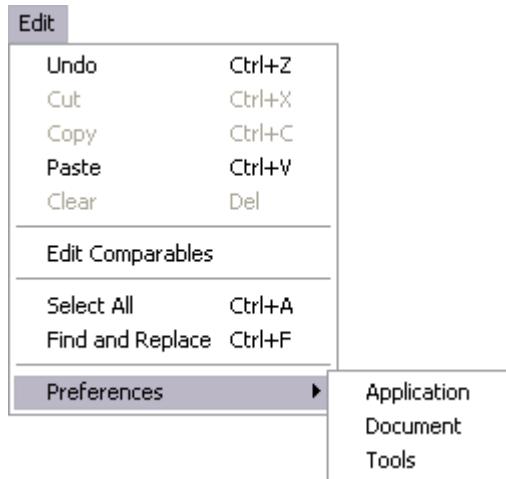
#### Preferences Menu Commands

The Preferences menu enables users to access and configure ClickForms options:

- [Application](#)
- [Document](#)
- [Tools](#)

#### Accessing the Preferences Menu

- To access the Preferences menu:



1. Click on the [Edit menu](#) title in the [menu bar](#).
2. Move the mouse cursor down to Preferences.

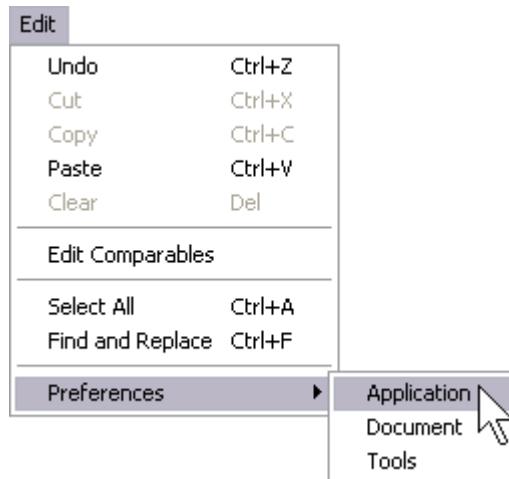
### 3.2.9.1 Application Preferences

#### Application Preferences

Use this command to launch and configure Application Preferences.

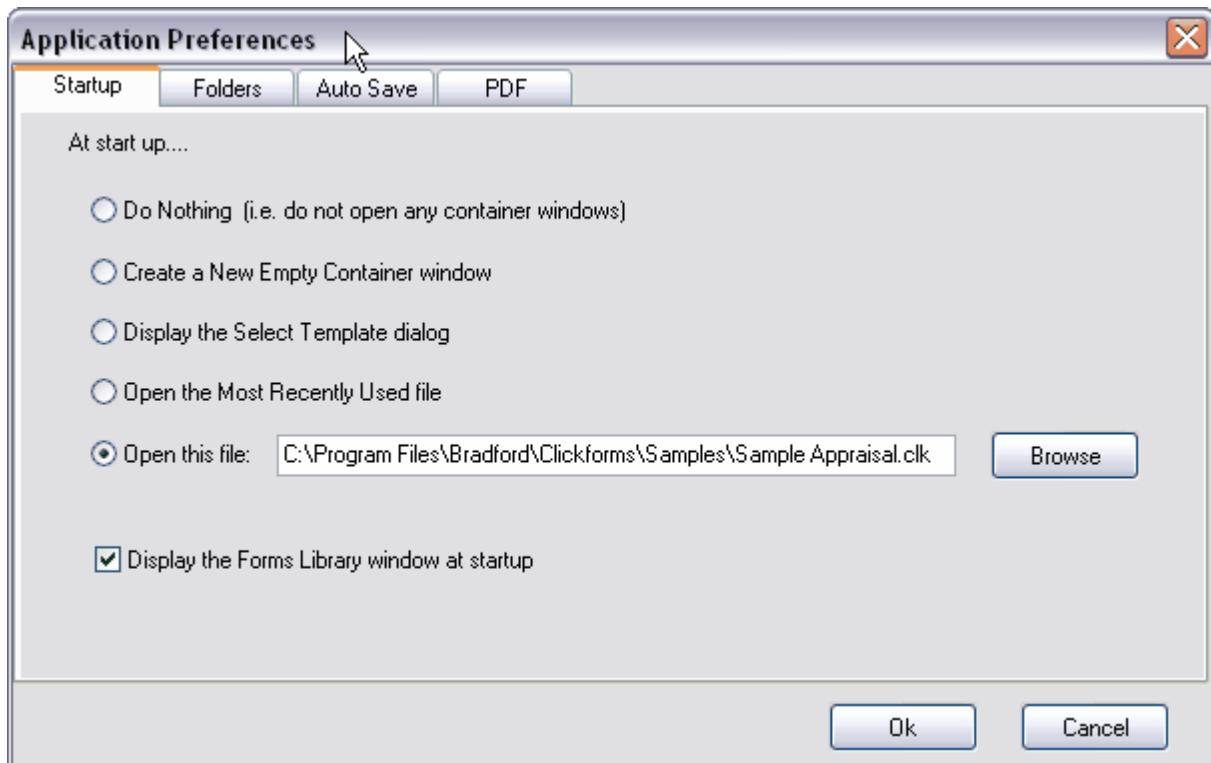
#### Accessing Application Preferences

- ▶ To access the Application Preferences:



1. Click on the Edit menu title in the menu bar.
2. Move the mouse cursor down to Preferences.
3. Click on Application.

#### Startup Preferences



Application Preferences: Startup

► The Application Preferences sheet will display, defaulting to the Startup tab page.

Select your startup option from these five choices:

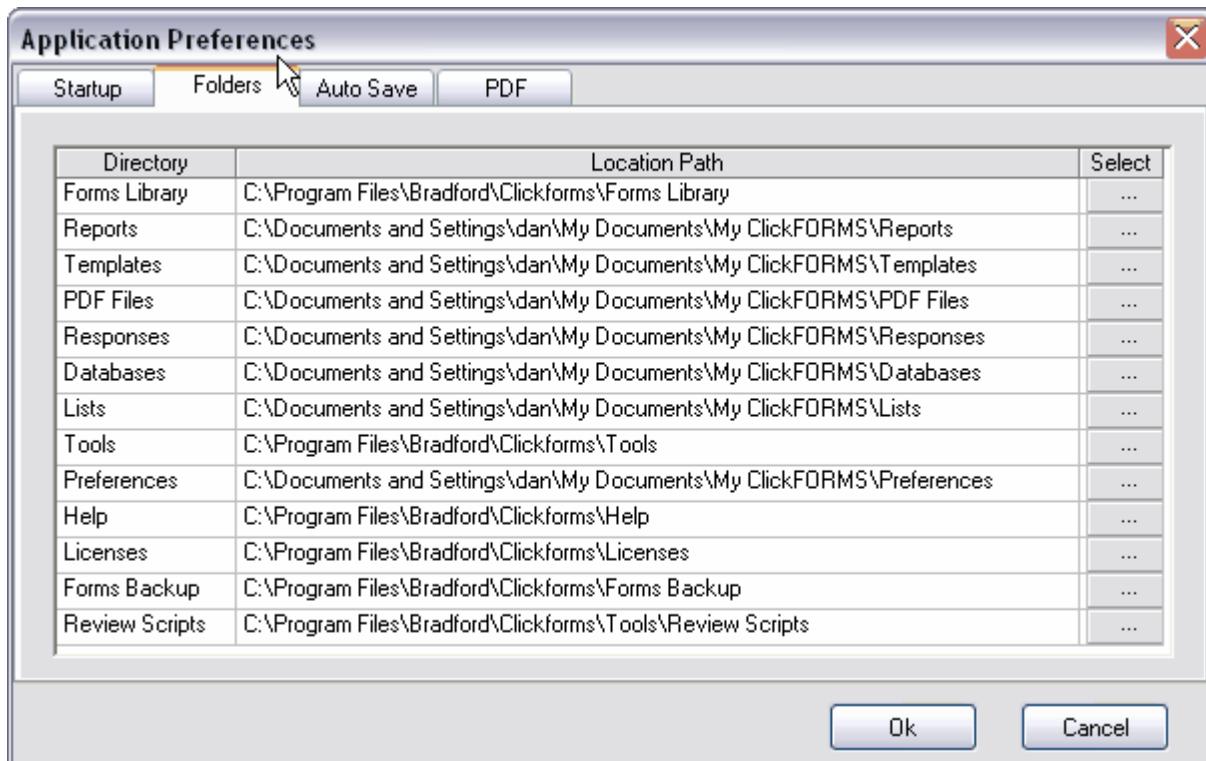
At ClickForms start up...

- Do Nothing (i.e., do not open any container windows) - This is the most rapid way to launch the program.
- Create a New Empty Container Window - At Start-up opens an empty container ready for you to drop in your forms.
- Display the Select Template dialog - This option starts up ClickForms and enables you to choose a report type from your custom templates.
- Open the Most Recently Used file - Pick up where you left off by opening the last report you were working on. This is great for working in the field, after setting up reports at your home or office.
- Open this file...(Click on the [Browse] button to Select a Startup File) - This is the default startup setting. ClickForms will open with a URAR template. This option enables you to start up with maximum customization. You can open any file immediately on launching the program.
- Display the Forms Library window at startup - Use this in conjunction with any other option.

- Even when hidden at launch, the [Forms Library](#) can be displayed at anytime from various locations.

### Folder Preferences

- Click on the Folders tab to view/modify application directories settings.



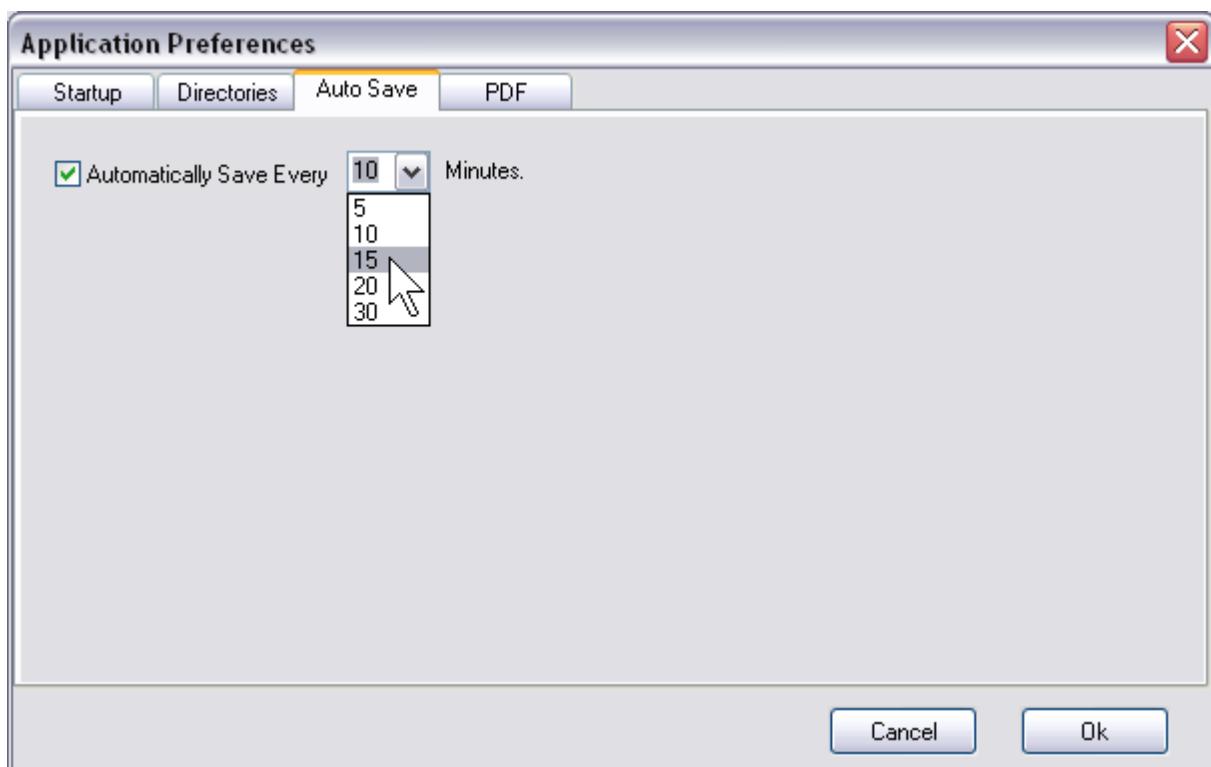
Application Preferences: Directories

- To edit the location of a Folder

1. Click on the [...] button in the Select column.
2. Use the Select Folder dialog to choose your desired Folder.
3. Click on the [OK] button so select the new location.

### Auto Save Preferences

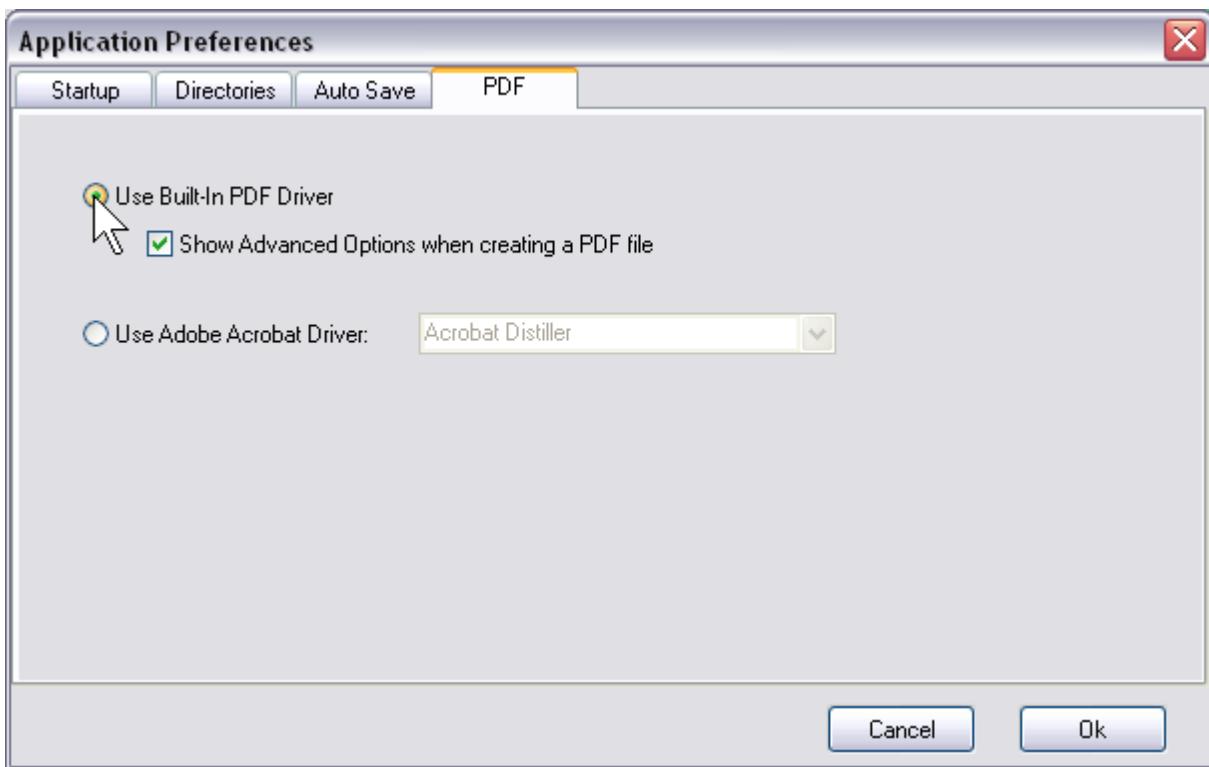
- Click on the Auto Save tab to view/modify application auto save settings.



Application Preferences: Auto Save

#### [PDF Preferences](#)

- ▶ Click on the PDF tab to verify/configure PDF driver options.



Application Preferences: PDF

- ▶ When modifications to your Application Preferences have been completed:
  - Click on the [Ok] button to save your settings.
  - To cancel any modifications from being saved, click on the [Cancel] button.

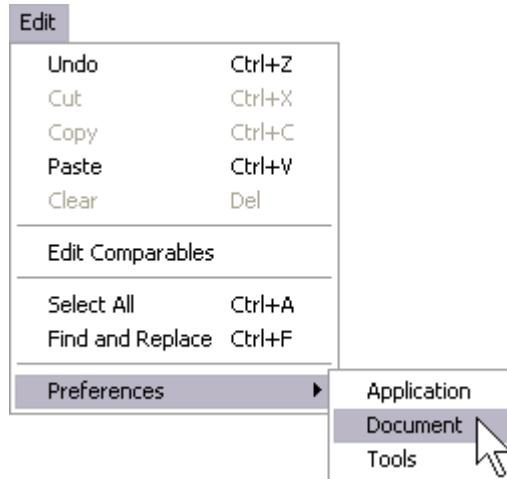
### 3.2.9.2 Document Preferences

#### [Document Preferences](#)

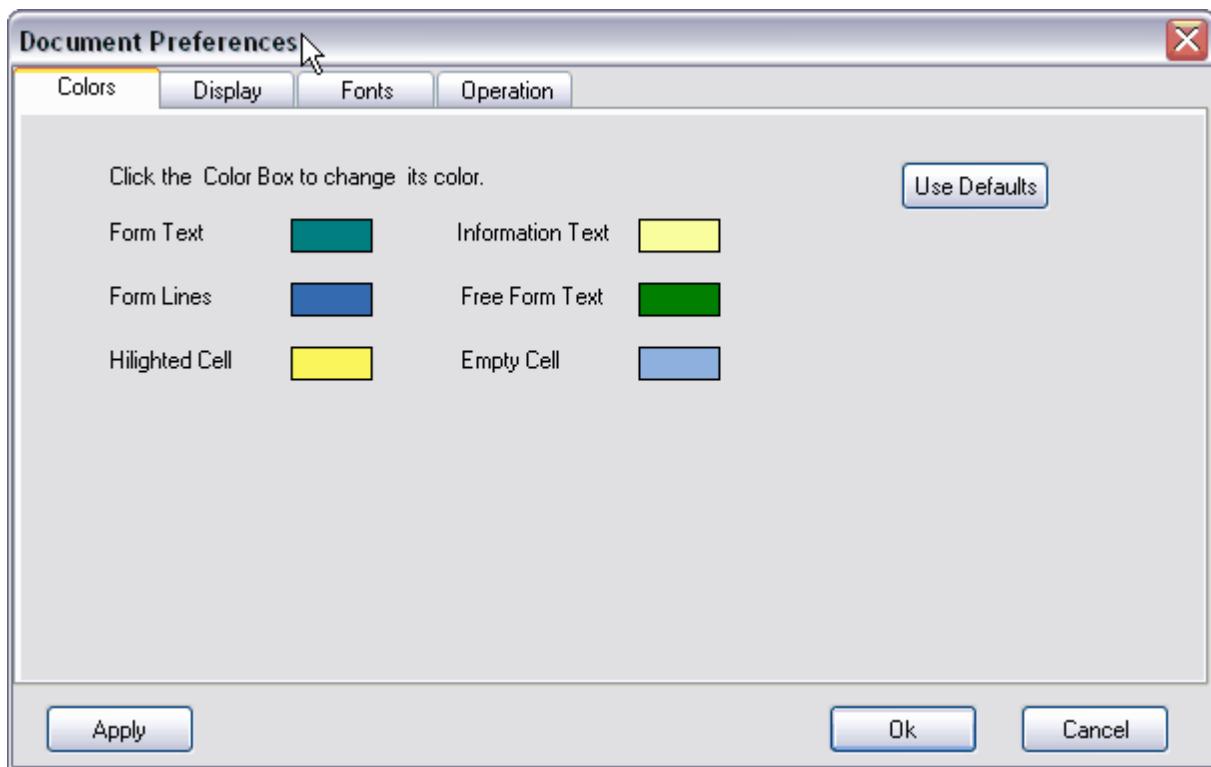
Use this command to launch and configure Document Preferences.

#### [Accessing Document Preferences](#)

- To access Document Preferences:

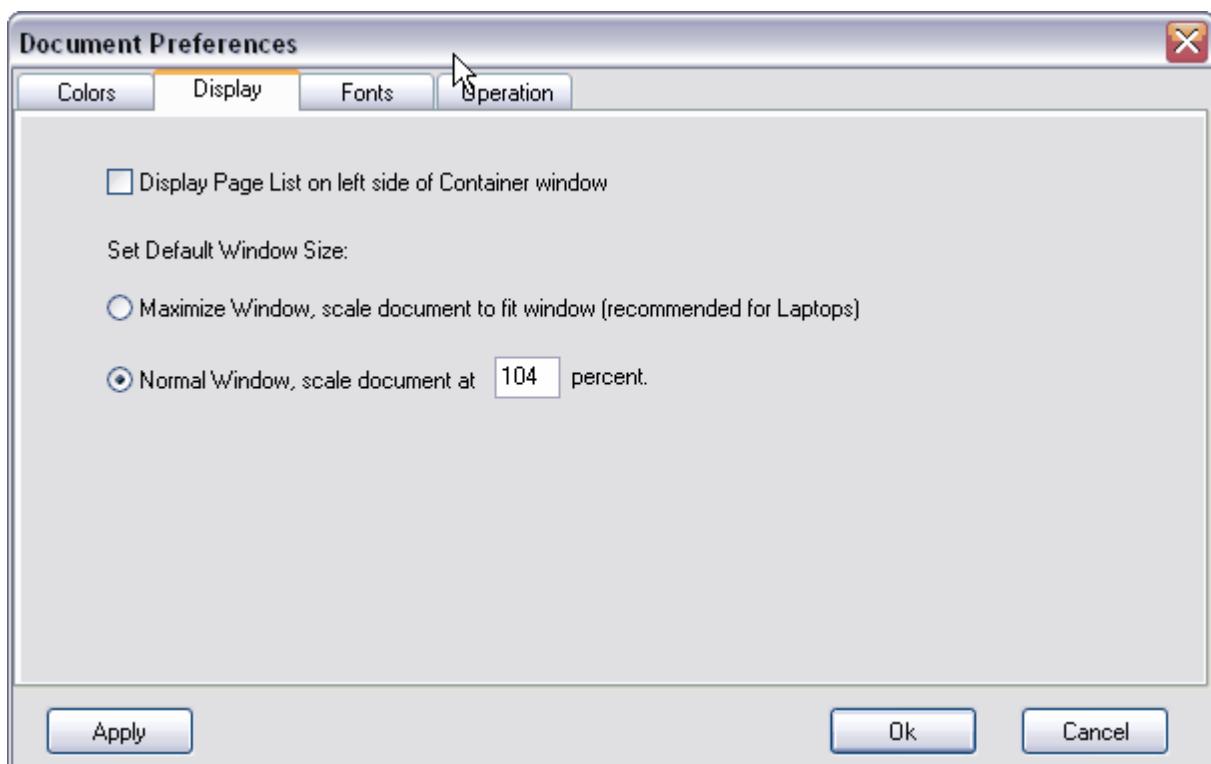


1. Click on the [Edit menu](#) title in the [menu bar](#).
2. Move the mouse cursor down to [Preferences](#).
3. Click on Document.



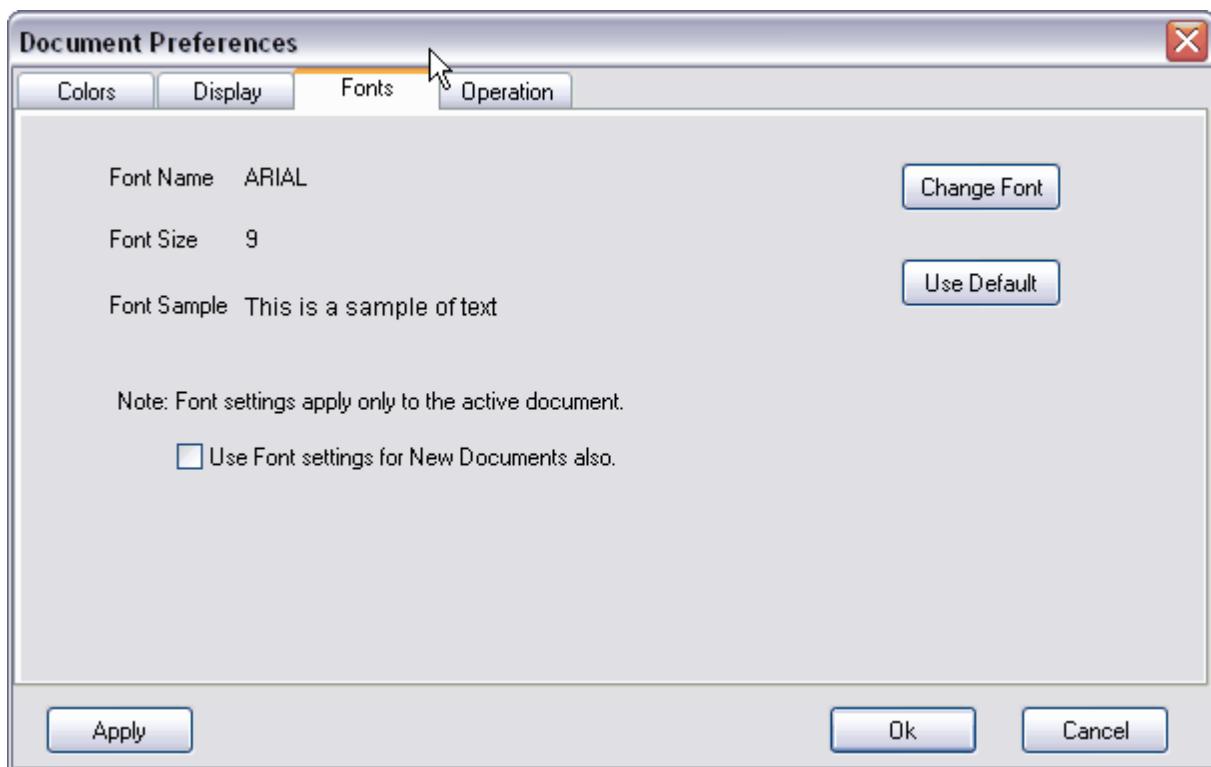
Document Preferences: Colors

- ▶ Document Preferences will display, defaulting to the Colors tab page.
- ▶ Click on the Display tab to view/modify document display settings.



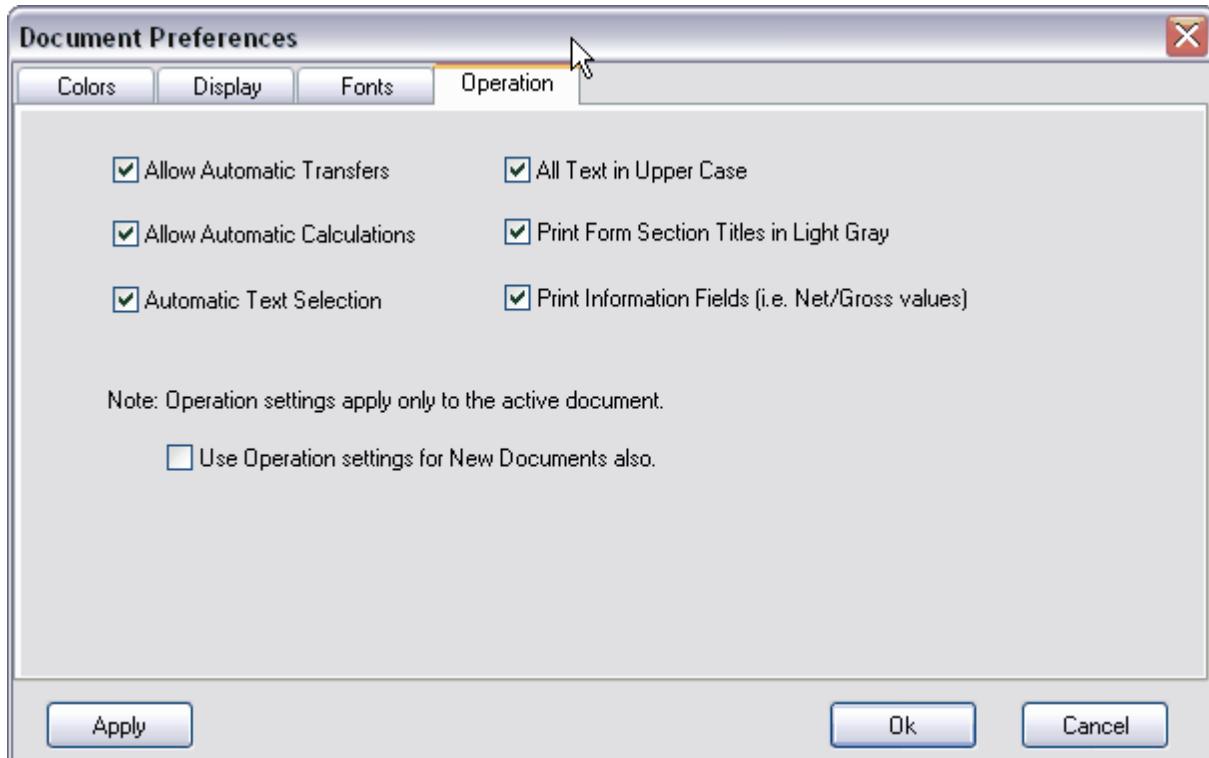
Document Preferences: Display

► Click on the Fonts tab to view/modify document font settings.



Document Preferences: Fonts

- Click on the Operation tab to view/modify document operation settings.



Document Preferences: Operation

- When modifications to your Document Preferences have been completed:
- Click on the [Apply] button to save your settings.
  - Click on the [Ok] button to close the Document Preferences property sheet.
  - To cancel any modifications from being saved, click on the [Cancel] button.
- Select the "Use as Defaults" check box in the button bar to apply these settings to all new documents.

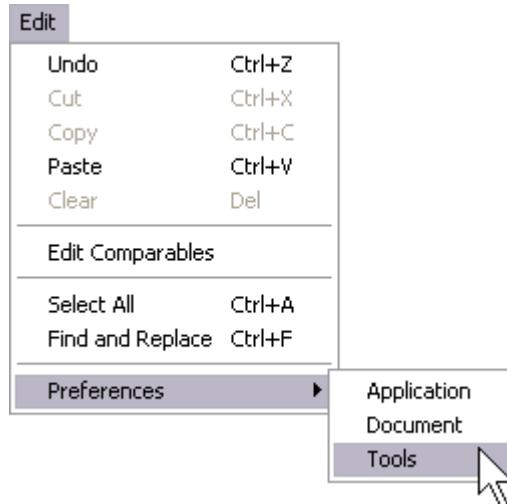
### 3.2.9.3 Tools Preferences

#### Tools Preferences

Use this command to launch and configure Tools Preferences.

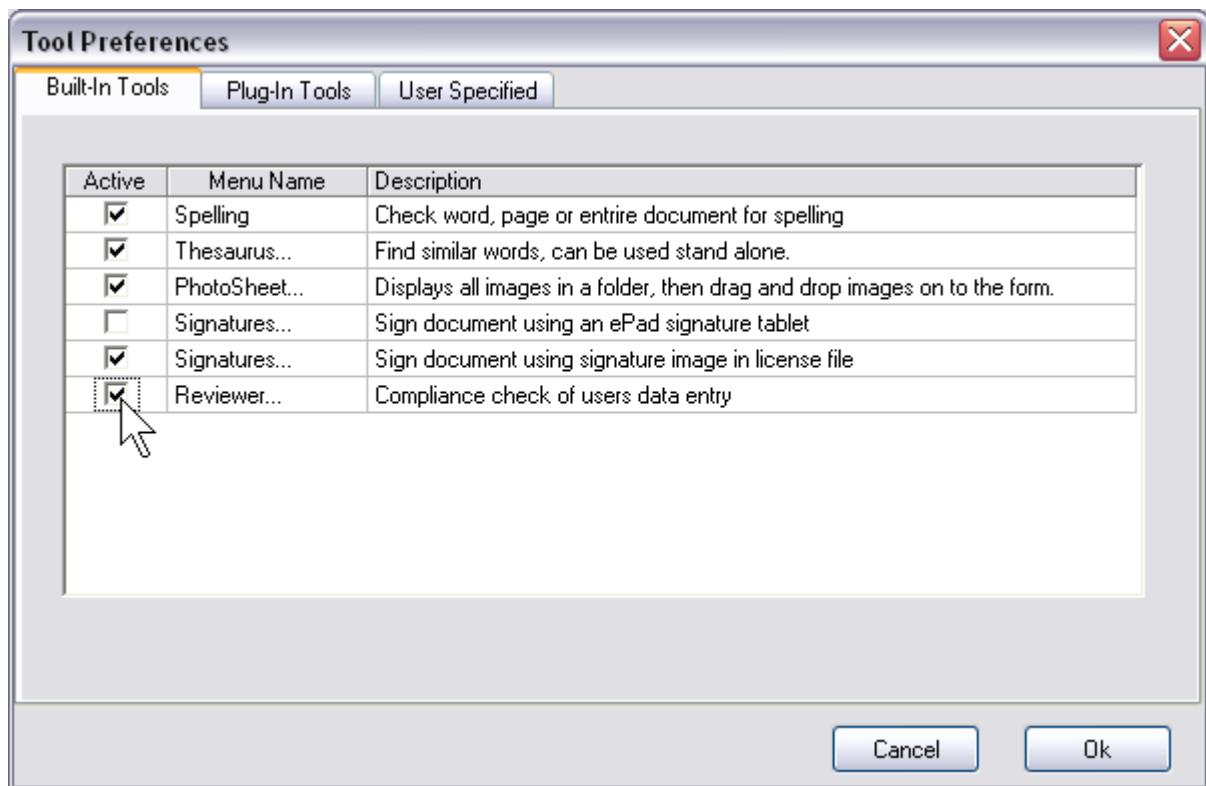
#### Accessing Tools Preferences

- ▶ To access Tools Preferences:



1. Click on the [Edit menu](#) title in the [menu bar](#).
2. Move the mouse cursor down to [Preferences](#).
3. Click on Tools.

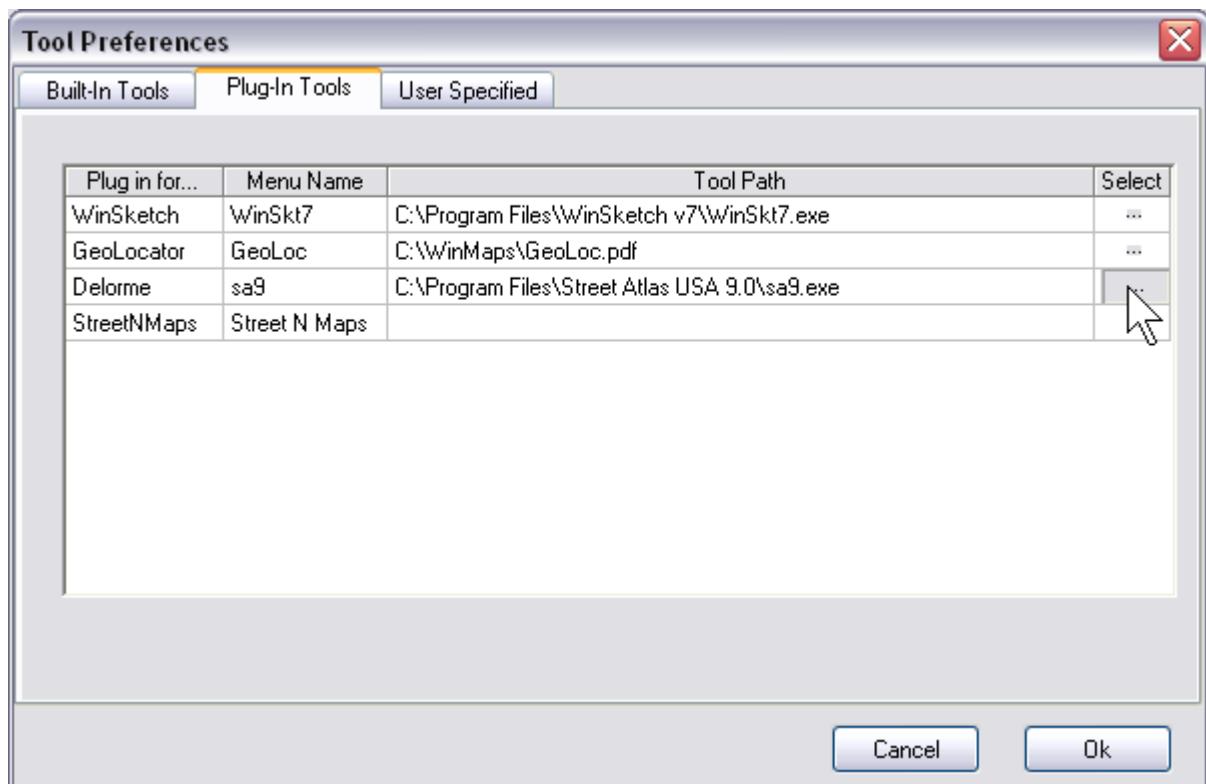
- ▶ Tool Preferences will display, defaulting to the [Built-In Tools](#) tab page.



Tools Preferences: Built-In Tools

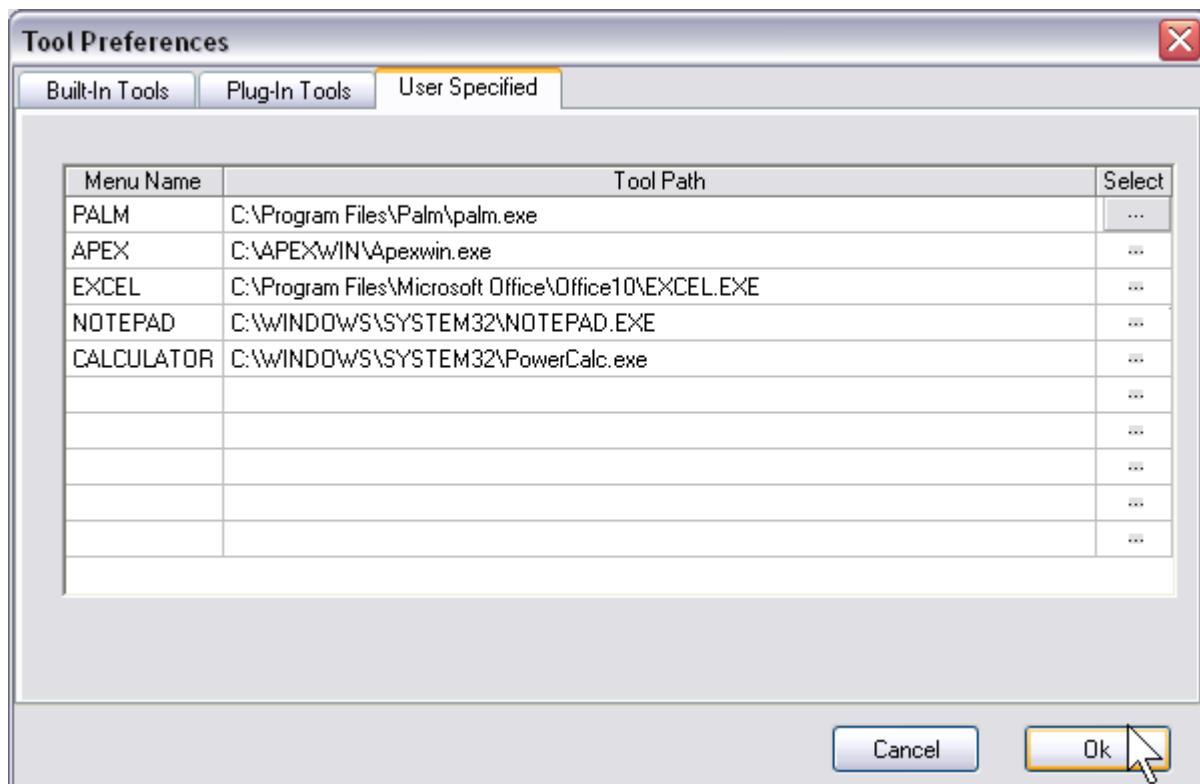
Built-In Tools are programs that are included with your software, i.e., [PhotoSheet](#), [Spell Checker](#), and [Digital Signature](#).

- ▶ To activate a Built-in Tool:
  1. Click on the check box in the Active column next to the Tool Menu Name.
  2. Click on the [Ok] button to save changes or select another Tool Preferences Tab to proceed.
- ▶ Click on the [Plug-In Tools](#) tab to view/modify Plug-In Tools directories settings.



Tools Preferences: Plug-In Tools

- ▶ Plug-In Tools are programs that can be integrated with your software, i.e., GeoLocator and Delorme Street Atlas USA.
- ▶ To edit the location of a Plug-In Tool:
  1. Click on the [...] button in the Select column.
  2. Use the Select a Tool dialog to choose your desired program directory.
  3. Click on the .exe program file to populate the File name box.
  4. Click on the [OK] button to select the new location.
- ▶ Click on the User Specified tab to view/add/modify additional tools settings.



Tools Preferences: User Specified

- ▶ User-Specified Tools are programs that you use often, but may not be integrated with your software, i.e., Palm Desktop and Windows Calculator.
- ▶ To edit the location of a User Specified Tool:
  1. Click on the [...] button in the Select column.
  2. Use the Select a Tool dialog to choose your desired program directory.
  3. Click on the .exe program file to populate the File name box.
  4. Click on the [Open] button to select the new location.
- ▶ When modifications to your Tools settings have been completed:
  - Click on the [Ok] button to close the Tools Preferences sheet.
  - Click on the [Cancel] button to prevent any changes from being saved.

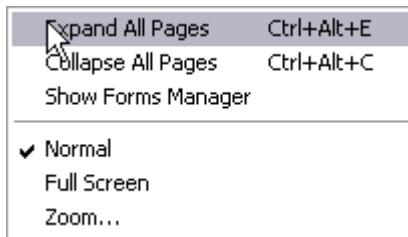
### 3.3 The View Menu

#### [View Menu Functions](#)

This menu displays a list of commands for organizing [Workspace](#) windows and customizing your field of view.

#### [Accessing the View Menu](#)

- ▶ To access the View Menu:



- ▶ Point your cursor to the View menu title in the [menu bar](#) and click once.

### 3.3.1 Expand All Pages

#### The Expand All Pages Command

Use this command to expand all pages from under their [Page Title Bars](#) to be visible in the [Workspace](#).

#### Expanding All Page Title Bars

- To expand all [Page Title Bars](#):



1. Click on the [View menu](#) title from the [menu bar](#).
2. Click on Expand All Pages (or use the [Ctrl+Alt+E](#) keys).

**URAR Page 1**

**UNIFORM RESIDENTIAL APPRAISAL REPORT**

**SUBJECT**

Property Address	1802 The Alameda	City	San Jose	State	CA	Zip Code	95126
Legal Description	Lot 25 - Erasure Bechet refer to Act#1010 for more detailed descrip	County	Santa Clara				
Assessor's Parcel No.	9782	Tax Year	1998	R.E Taxes \$	\$1300	Special Assessment \$	N/A
Borrower	Jack Jones	Current Owner	James Burbun	Occupant	Owner	Tenant	X Vacant
Property rights appraised	<input checked="" type="checkbox"/> Fee Simple <input type="checkbox"/> Leasehold	Role of Type	<input checked="" type="checkbox"/> PUD <input type="checkbox"/> Condominium/HUD/Only HD/	Land use change	N/A		
Neighborhood or Project Name	Erasure Bechet		Map Reference	863-04	Census Tract	32N 57E	
Sale Price \$	350,000	Date of Sale	4/17/99	Description and \$ amount to be paid by seller	N/A		
Lender/Clien	Ford Capital Mortgage Co.	Address	1942 Juliana St. San Francisco, CA 95318				
Appraiser	John Doe	Address	7174 Santa Teresa Blvd. Suite A2 San Jose, CA 95139				
Location	<input type="checkbox"/> Urban <input checked="" type="checkbox"/> Suburban <input type="checkbox"/> Rural	Predominant occupancy	Single family housing		Land use change		
Builtup	<input type="checkbox"/> Over 75% <input checked="" type="checkbox"/> 25-75% <input type="checkbox"/> Under 25%	<input checked="" type="checkbox"/> Owner <input type="checkbox"/> Tenant	300	Low 26	<input checked="" type="checkbox"/> Not likely <input type="checkbox"/> Likely		
Growth rate	<input checked="" type="checkbox"/> Rapid <input type="checkbox"/> Stable <input type="checkbox"/> Slow		400	High 23	<input type="checkbox"/> In process		
Property values	<input checked="" type="checkbox"/> Increasing <input type="checkbox"/> Stable <input type="checkbox"/> Declining				To:		
Demand/supply	<input checked="" type="checkbox"/> Shortage <input type="checkbox"/> In balance <input type="checkbox"/> Over supply						
Whiting time	<input checked="" type="checkbox"/> Under one year <input type="checkbox"/> 3-6 mos. <input type="checkbox"/> over 6 mos.						

Note: race and the racial composition of the neighborhood are not analytical factors.

Neighborhood boundaries and characteristics: The subject neighborhood's boundaries are as follows: NORTH by Westwood st., SOUT by Redwood park, EAST by University Ave., and West by Iguana lake.

Pages: 25

Expanded Page Title Bar

- All pages under [Page Title Bars](#) will become expanded into view in the [Workspace](#).

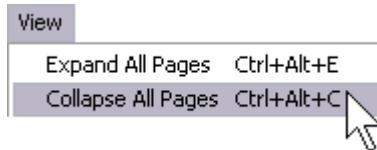
### 3.3.2 Collapse All Pages

#### The Collapse All Pages Command

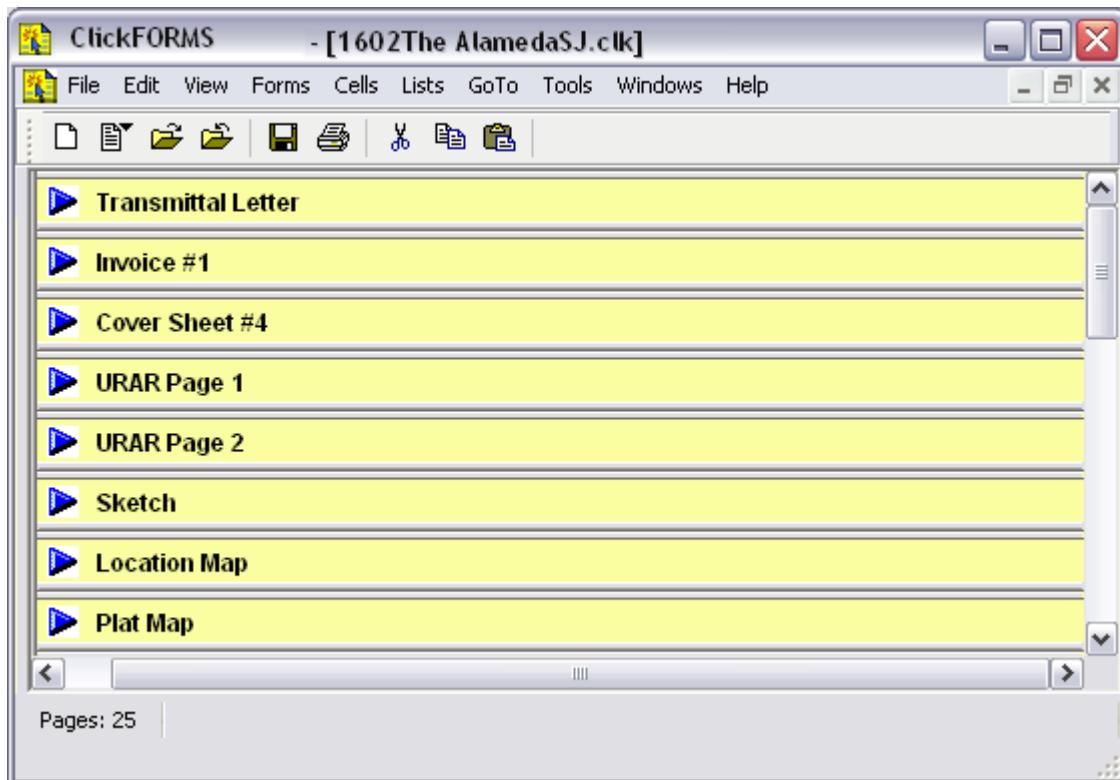
Use this command to collapse all pages, hiding them from view under [Page Title Bars](#) in the [Workspace](#).

#### Collapsing All Page Title Bars

- To collapse all [Page Title Bars](#):



1. Click on the [View menu](#) title from the [menu bar](#).
2. Click on Collapse All Pages (or use the [Ctrl+Alt+C](#) keys).



Collapsed Page Title Bars

- All [Page Title Bars](#) can be viewed as collapsed within the [Workspace](#).

**ClickFORMS - [1602The AlamedaSJ.clk]**

File Edit View Forms Cells Lists GoTo Tools Windows Help

Transmittal Letter  
Invoice #1  
Cover Sheet #4  
**URAR Page 1**

**UNIFORM RESIDENTIAL APPRAISAL REPORT**

Property Description: 1602 The Alameda, City: San Jose, State: CA, Zip Code: 95126  
 Legal Description: Lot 25 - Erasure Bechet refer to Act#1010 for more detailed descrptn  
 Assessor's Parcel No: 9782 Tax Year: 1998 P. E Taxes\$: \$1300 Special Assessments\$: N/A  
 Borrower: Jack Jones Current Owner: James Burbun Occupant: Owner Tenant: X Vacant  
 Property right appraised:  Fee Simple Leasehold Project Type:  PUD Condominium/HUD/Bank: HOA: N/A  
 Neighborhood or Project Name: Erasure Bechet Map Reference: B53-D4 Census Tract: 32N 57E  
 Sale Price: \$350,000 Date of Sale: 4/17/99 Description and \$ amount to be charged to concessions to be paid by seller: N/A  
 Lender/Clien: Ford Capital Mortgage Co. Address: 1942 Juliana St. San Francisco, CA 95318  
 Appraiser: John Doe Address: 7174 Santa Teresa Blvd. Suite A2 San Jose, CA 95139

Location	<input type="checkbox"/> Urban	<input type="checkbox"/> Suburban	<input type="checkbox"/> Rural	Redominant occupancy	Single family housing	Attitude	% Off	Land use change
Builtup	<input checked="" type="checkbox"/> Over 75%	<input checked="" type="checkbox"/> 25-75%	<input type="checkbox"/> Under 25%	<input checked="" type="checkbox"/> Owner	300 Low 26	One family	100	<input checked="" type="checkbox"/> Not Likely <input type="checkbox"/> Likely
Growth rate	<input checked="" type="checkbox"/> Rapid	<input type="checkbox"/> Stable	<input type="checkbox"/> Slow	<input type="checkbox"/> Tenant	400 High 23	2-4 family		<input type="checkbox"/> In process
Property values	<input checked="" type="checkbox"/> Increasing	<input type="checkbox"/> Stable	<input type="checkbox"/> Declining	<input checked="" type="checkbox"/> Vacant 0-5%	Redominant	Multifamily		To:
Demand/supply	<input checked="" type="checkbox"/> Shortage	<input type="checkbox"/> In balance	<input type="checkbox"/> Over supply	<input checked="" type="checkbox"/> Vacant 0-5%	Commercial			
Housing type	<input checked="" type="checkbox"/> Under 5 yrs.	<input type="checkbox"/> 5-6 mos.	<input type="checkbox"/> over 6 mos.					

Note: race and the racial composition of the neighborhood are not appraisal factors.  
 Neighborhood boundaries and characteristics: The subject neighborhood's boundaries are as follows: NURTH by Westwood st., SUU by Redwood park, EAST by University Ave., and WEST by Iguna lake.

Factors that affect the marketability of the properties in the neighborhood include: location and amenities, environment visibility, annual income market etc.  
 The subject neighborhood is "Erasure Bechet", a well established neighborhood in the suburbs of San Jose. This neighborhood is known as a higher class area with excellent public schools and parks. Erasure Bechet is composed of approximately 34 lots and has 100% single family residential land use. Demand is high for these houses which are composed of multiple car garages and multiple fireplaces.

Market conditions in the subject neighborhood including support for the above conclusions related to the trend of property values, demand/supply, and marketing time such as data on competitive properties for sale in the neighborhood, description of the prevalence of sales and financing concessions, etc.

During the lifetime of the Erasure Bechet community, the market for this area has been in demand much higher than supply. Market conditions are presently considered, because this area is a high demand area. Marketing periods generally range from 1-3 months. Properties financed within the subject market area are typically financed with 25% down on principal. The high tech industry continues to boom in silicon valley and thus the need for high class housing within distance to industrial areas is in high demand.

PUD Information: Is the developer/builder in control of the Home Owner's Association (HOA):  Yes  No  
 Approximate total number of units in the subject project: N/A Approximate total number of units for sale in the subject project: N/A  
 Describe common elements and recreational facilities: N/A

Description: Irregular (cul-de-sac) Topography: 0-10% Slope

Pages: 25

Collapsed and Expanded Page Title Bars

► Click on the blue arrows to expand the pages under individual [Page Title Bars](#).

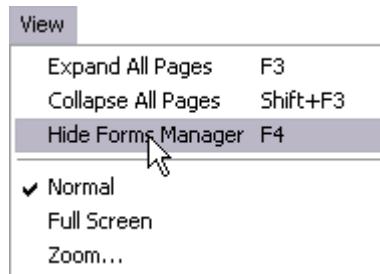
### 3.3.3 Hide Forms Manager

#### The Hide/Show Forms Manager Commands

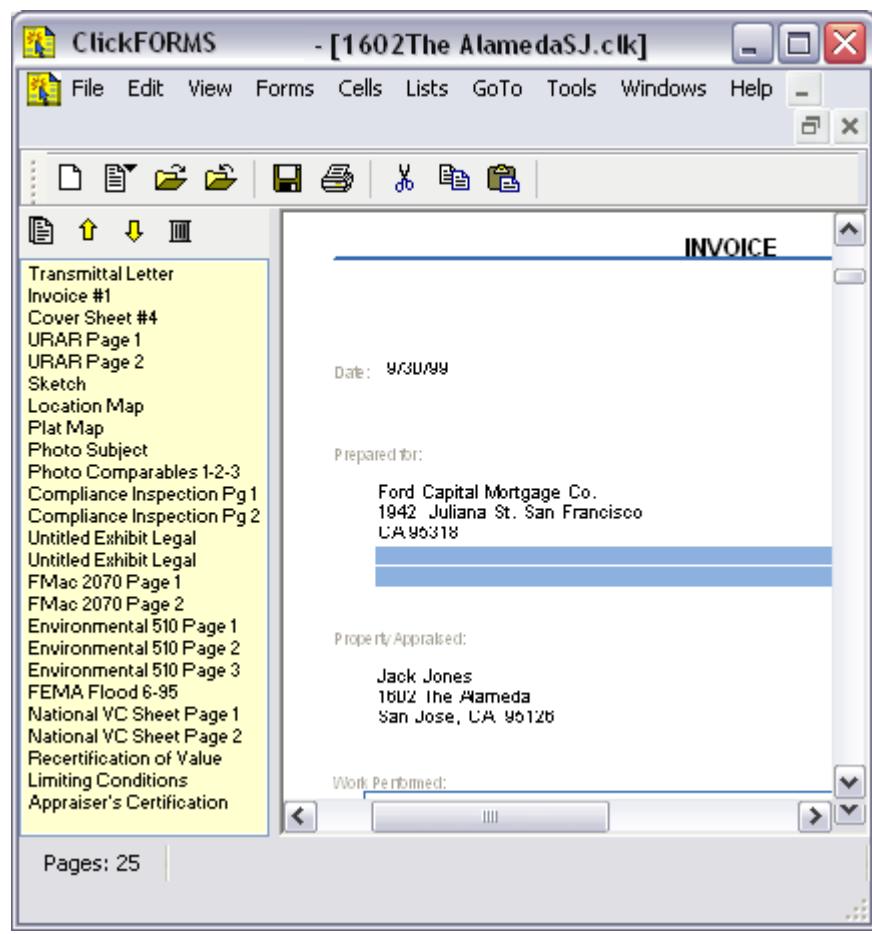
Use these commands to display the [Forms Manager](#) or hide it from view.

#### Hiding the Forms Manager

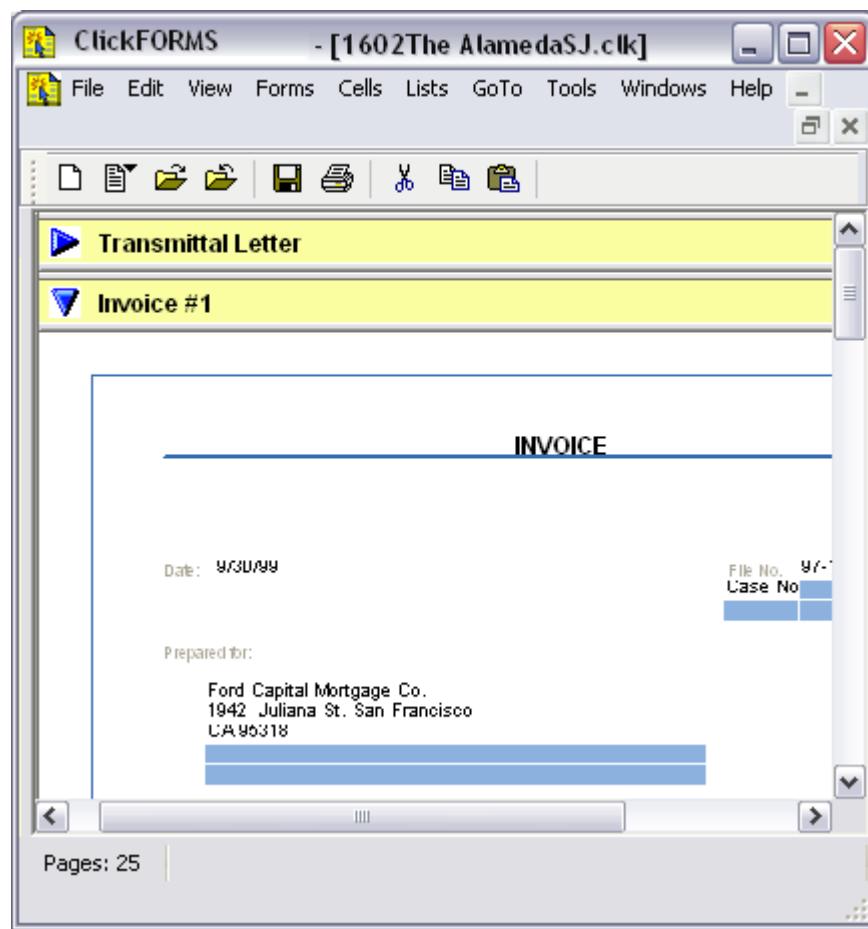
- To hide the [Forms Manager](#):



1. Click on the [View menu](#) title from the [menu bar](#).
2. Click on Hide [Forms Manager](#).



- The [Forms Manager](#), which is docked on the left-hand side of your [Workspace](#), will disappear.

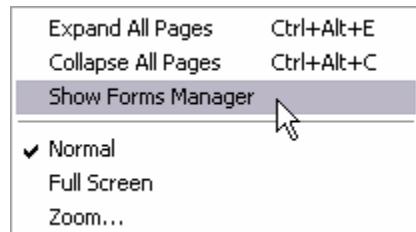


Workspace With Hidden Forms Manager

- When the [Forms Manager](#) is hidden, you can use the [Page Title Bars](#), vertical/horizontal scroll bars and [GoTo menu](#) to navigate, or try the [Page Up] and [Page Down] keys on your [keyboard](#).

### Showing the Forms Manager

- To show the [Forms Manager](#):



1. Click on the [View menu](#) title from the [menu bar](#).
2. Click on Show [Forms Manager](#).

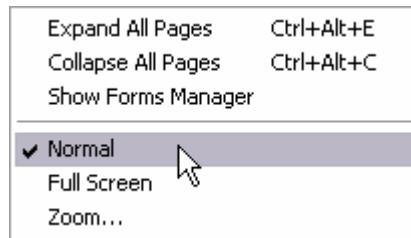
### 3.3.4 Normal

#### The Normal Command

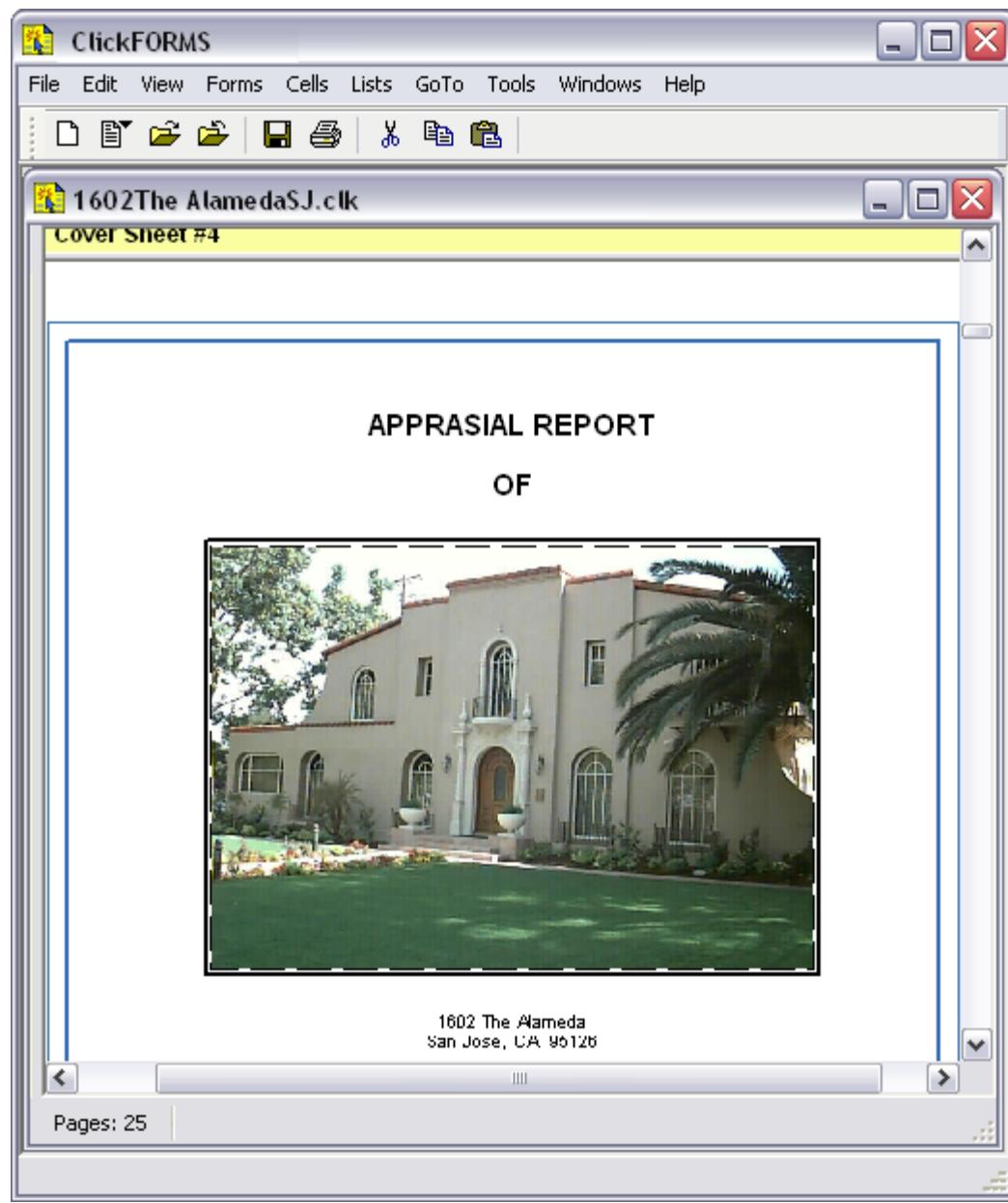
Use this command to enable the page view to expand beyond the [Workspace](#). Each open report will appear in a separate window.

#### Enabling Normal View

- To enable a normal [Workspace](#) view:



1. Click on the [View menu](#) title from the [menu bar](#).
2. Click on Normal.



- The [Workspace](#) view will return to default size, enabling the horizontal scroll bar.

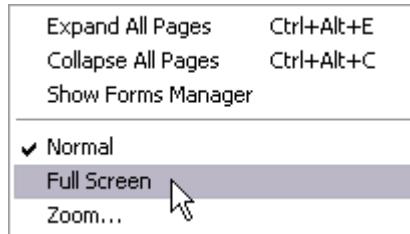
### 3.3.5 Full Screen

#### The Full Screen Command

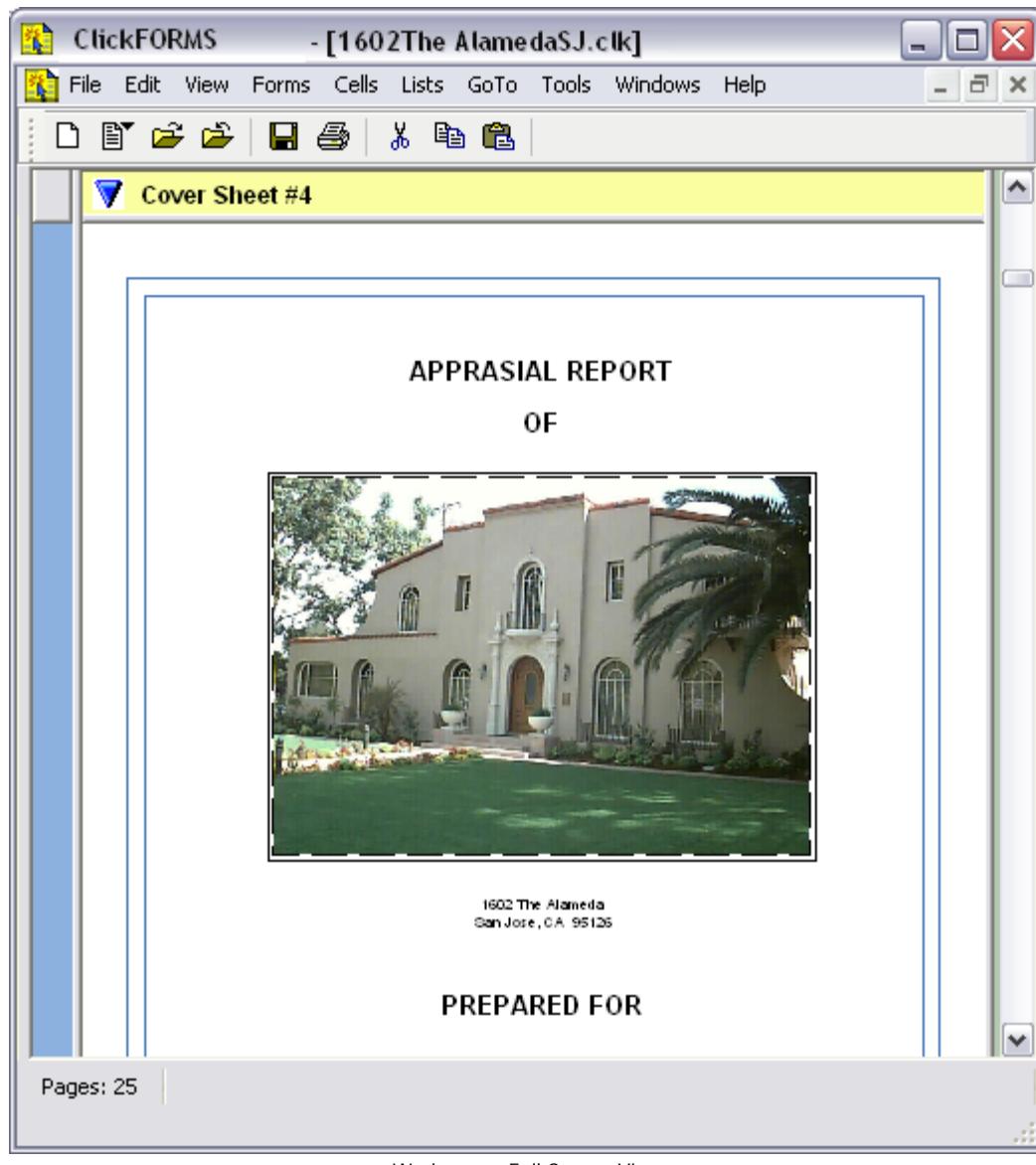
Use this command to automatically resize the page view to fill the entire [Workspace](#).

#### Enabling Full Screen View

- ▶ To enable a full screen [Workspace](#) view:



1. Click on the [View menu](#) title from the [menu bar](#).
2. Click on Full Screen.



Workspace: Full Screen View

- The page will be re-sized to fill your entire [Workspace](#) and the horizontal scroll bar will disappear.
- In this state, the page will resize in tandem with the application's main window.

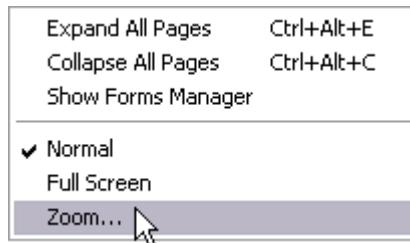
### 3.3.6 Zoom

#### The Zoom Command

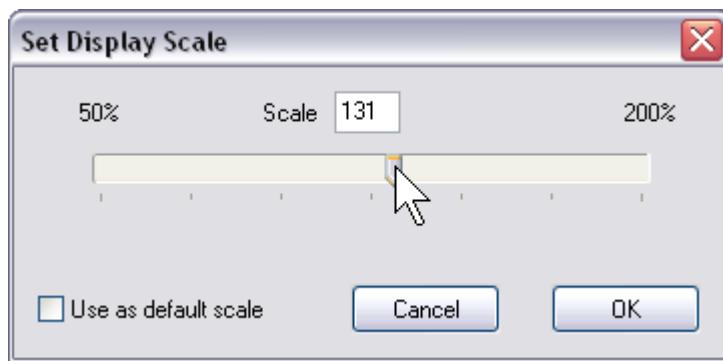
Use this command to scale the page view into focus within 50% to 200% of the [Workspace](#).

#### Enabling Zoom

- To enable the Zoom command:



1. Click on the [View menu](#) title from the [menu bar](#).
2. Click on Zoom.



The Set Display Scale Zoom Control

1. When the Set Display Scale zoom control is displayed, adjust the slider control to the desired parameters.
2. Select the "Use as default scale" check to launch reports, by default, at the display scale of your choice.
3. Click on the [OK] button to proceed.

ClickFORMS - [1602The AlamedaSJ.clk]

File Edit View Forms Cells Lists GoTo Tools Windows Help

= \$ 379,326 Est. Remaining Econ. Life: 60 yrs Site/Total = 0%

COMPARABLE NO. 1	COMPARABLE NO. 2	COMPARABLE NO. 3
1231 Villa Ave. San Jose	1242 Villa Ave. San Jose	1578 The Alameda San Jose
Same Development	Same Development	Same Street
\$ 325,000	\$ 390,000	\$ 360,000
\$ 55.18	\$ 56.52	\$ 57.76
MLS#125680 Act#95-2394	MLS#104939 Act#23-9382	MLS#18263 Act#83-8259
DESCRIPTION +(-)\$ Adjustment	DESCRIPTION +(-)\$ Adjustment	DESCRIPTION +(-)\$ Adjustment
Conventional Paid	Conventional Paid	Conventional Paid
		7/19/95
Suburban	Suburban	Suburban
Fee Simple	Fee Simple	Fee Simple
Cul-de-sac	Cul-de-Sac	Cul-de-sac
Similar	Similar	Similar
Similar	Similar	Similar
Average	-2,000	Good
25	-1,500	21
Average	-500	+2,000
	Good	Good

Pages: 25

Report in Workspace at 131% Magnification

- The page will be displayed in the [Workspace](#) at the selected scale.

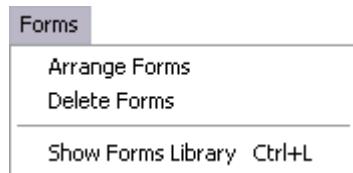
## 3.4 The Forms Menu

### Forms Menu Functions

This menu contains commands for managing forms in your report and controlling [Forms Library](#) visibility.

### Accessing the Forms Menu

- ▶ To access the Forms Menu:



- ▶ Point your cursor to the Forms menu title in the [menu bar](#) and click once.

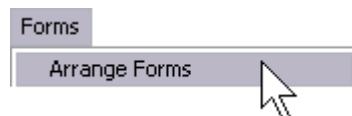
### 3.4.1 Arrange Forms

#### The Arrange Forms Command

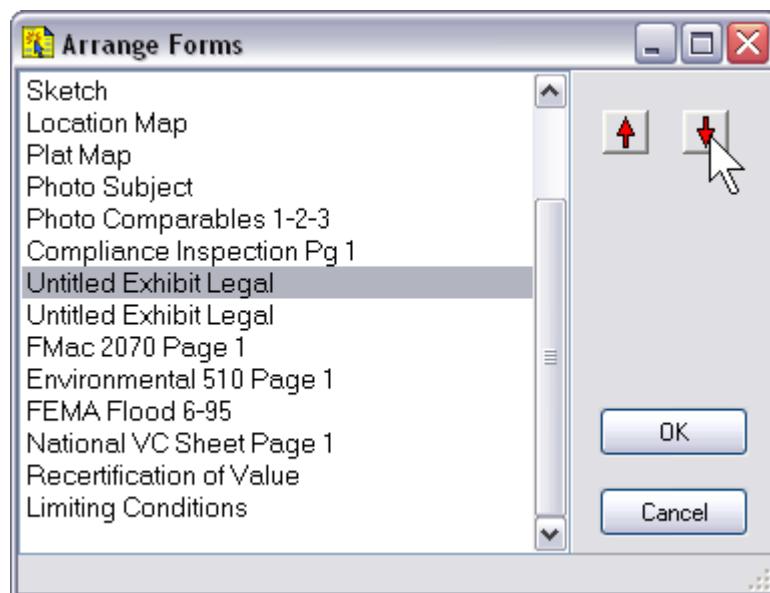
Use this command to modify the sequence of forms in your report.

#### Arranging Forms

- To arrange forms:



1. Click on the [Forms menu](#) title in the [menu bar](#).
2. Click on Arrange Forms.



The Arrange Forms Dialog

- When the Arrange Forms dialog is displayed:

1. Select the name of the form that you would like to reposition from the list view window.
2. Click on the up/down red arrow buttons on the right until the form is in the desired position.
3. Click on the [OK] button to proceed or click on the [Cancel] button to ignore the changes.

- All pages in the selected form will be repositioned.

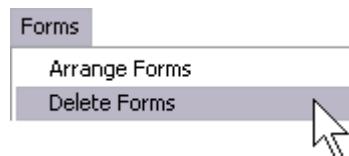
### 3.4.2 Delete Forms

#### The Delete Forms Command

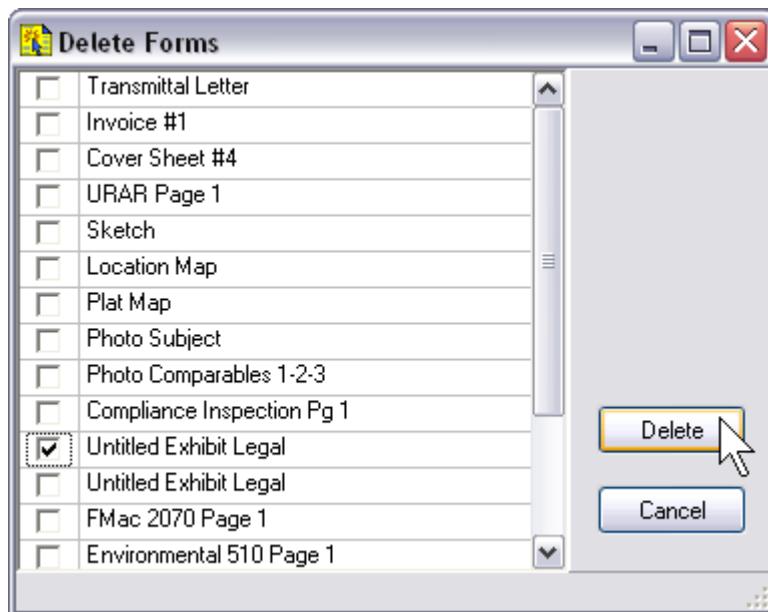
Use this command to remove forms from your report.

#### Deleting Forms

- To delete a form:



1. Click on the [Forms menu](#) title in the [menu bar](#).
2. Click on Delete Forms.



The Delete Forms Dialog

- When the Delete Forms dialog is displayed:

1. Select the check box(es) beside the name(s) of the form(s) to be removed from your report.
2. Click on the [Delete] button on the right.

- All pages in the selected form will be removed from your report.

► Click on the [Cancel] button to close this dialog, leaving your report unchanged.

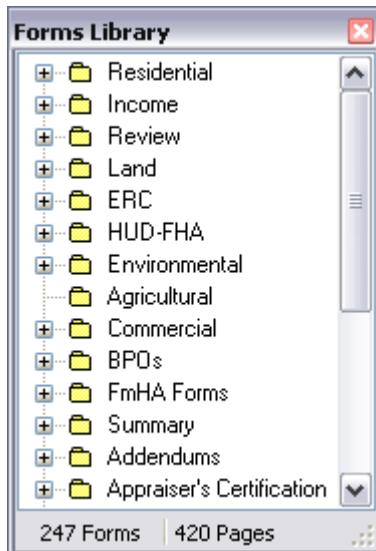
### 3.4.3 Hide Forms Library

#### The Show/Hide Forms Library Commands

Use these commands to control [Forms Library](#) window visibility.

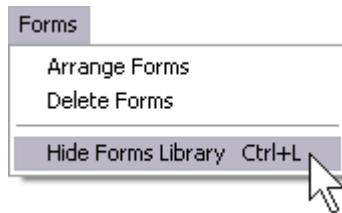
#### Hiding the Forms Library

- ▶ To Hide the [Forms Library](#):



Forms Library: Visible Mode

- ▶ When the [Forms Library](#) is visible:



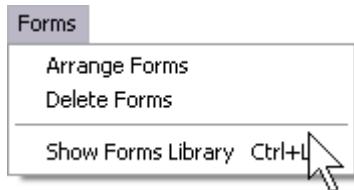
1. Click on the [Forms menu title](#) in the [menu bar](#).
2. Click on [Hide Forms Library](#) (or use the [Ctrl+L](#) keys).

- ▶ The [Forms Library](#) will disappear from view.

#### Displaying the Forms Library

- ▶ To Show the [Forms Library](#):

- ▶ When the [Forms Library](#) is hidden:



1. Click on the [Forms Menu](#) from the [menu bar](#).
2. Click on Show [Forms Library](#) (or use the [Ctrl+L](#) keys).

► The [Forms Library](#) will be displayed.

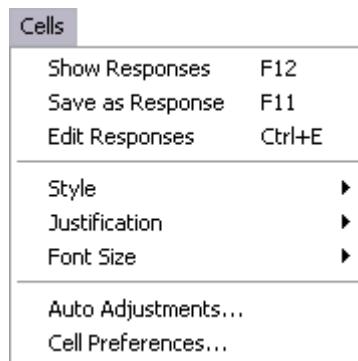
## 3.5 The Cells Menu

### Cells Menu Commands

This menu displays a list of commands for formatting text, configuring cells and automating data entry into your reports.

### Accessing the Cells Menu

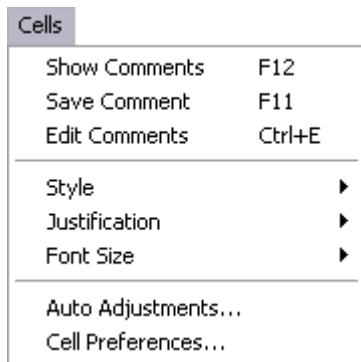
- ▶ To access the Cells Menu:



- ▶ Point your cursor to the Cells menu title in the [menu bar](#) and click once.
- ▶ When you have activated a [Response](#) cell, the Cells menu will display Response selections.

### Alternate Display

- ▶ When you have activated a cell that holds Comment text, the Cells menu will display Comment selections.



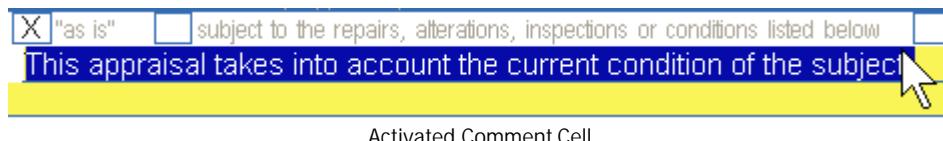
### 3.5.1 Show Comments

#### The Show Comments Command

Use this command to activate the Standard Comments menu for any selected Comments cell.

#### Displaying Standard Comments

- To display the Standard Comments menu for a selected cell:

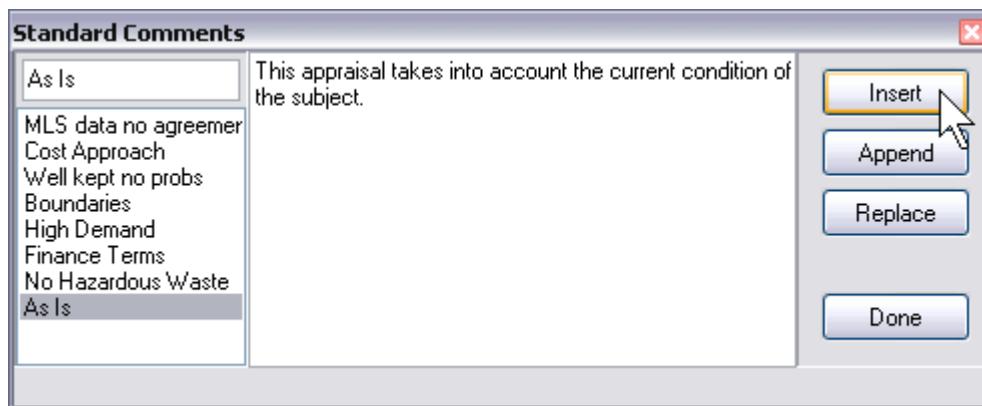


Activated Comment Cell

- Click inside a Comment Cell to activate this feature.



1. Click on the Cells menu title in the menu bar.
2. Click on Show Comments (or use the F12 key).



The Standard Comments Dialog: Insert

- The Standard Comments dialog will be displayed.
- Select the desired comment and click on the [Insert] button to transfer the text to the selected cell.

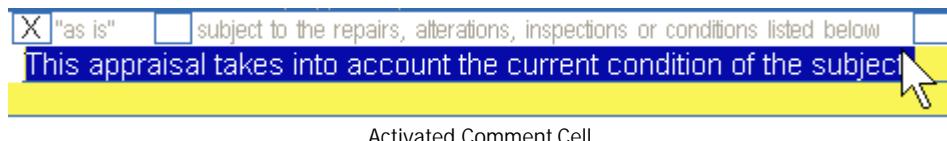
### 3.5.2 Save Comments

#### The Save as Response Command

Use this command to save the text entered in a cell as a Comment.

#### Saving Text as a Comment

- ▶ To save a Comment:

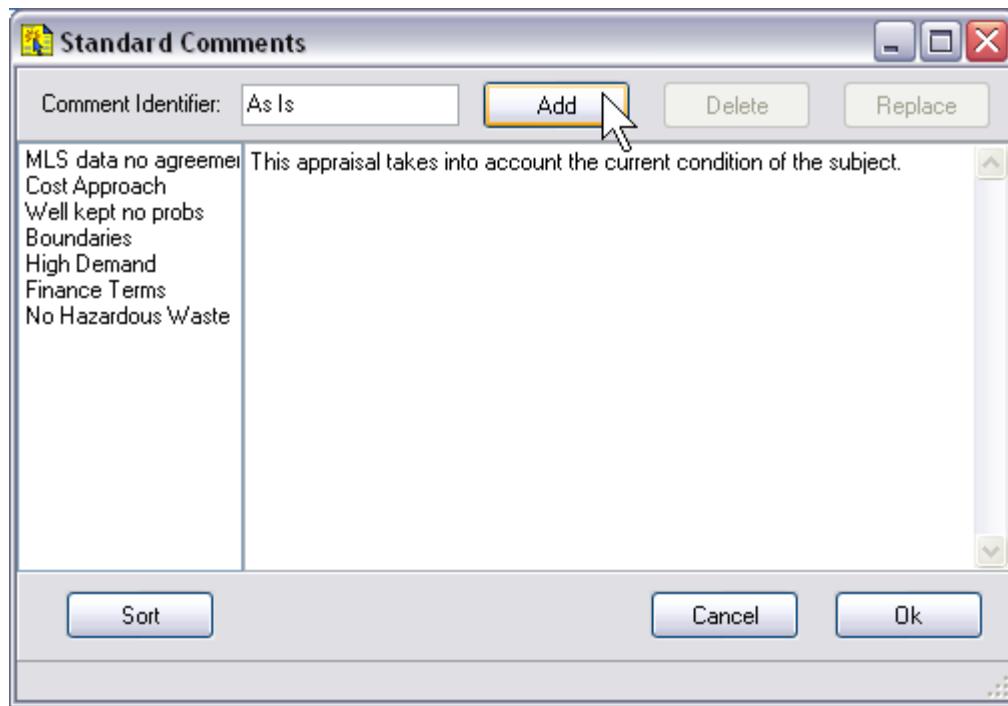


Activated Comment Cell

- ▶ Click inside the cell to activate it.
- ▶ Type in the Comment text that you will be saving.



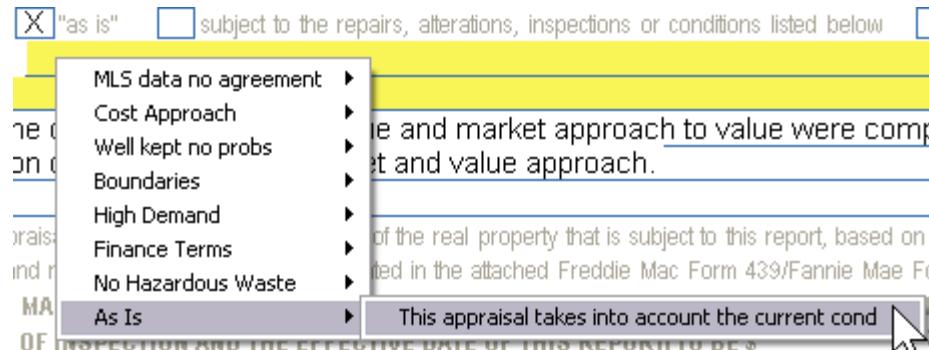
1. Click on the [Cells menu](#) title in the [menu bar](#).
2. Click on Save Comment (or use the [F11](#) key).



The Standard Comments Dialog: Add

- ▶ When the Standard Comments dialog is displayed, enter a Comment Identifier.

- Click on the [Add] button to save and click on the [Ok] button to proceed.



Example: Select Standard Comment For Insertion

- The text will now be available for selection and insertion into any Comment Cell as a Standard Comment.

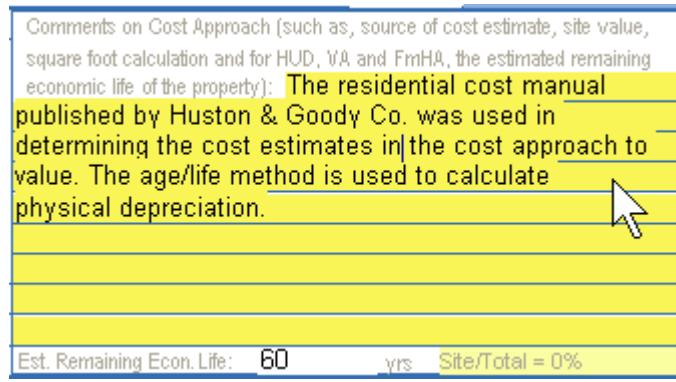
### 3.5.3 Edit Comments

#### The Edit Comments Command

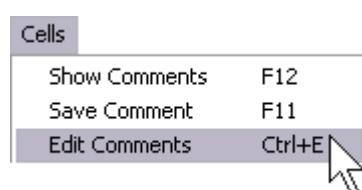
This command displays the Standard Comments sheet, which is used for managing your saved Comments.

#### Using the Edit Comments Command

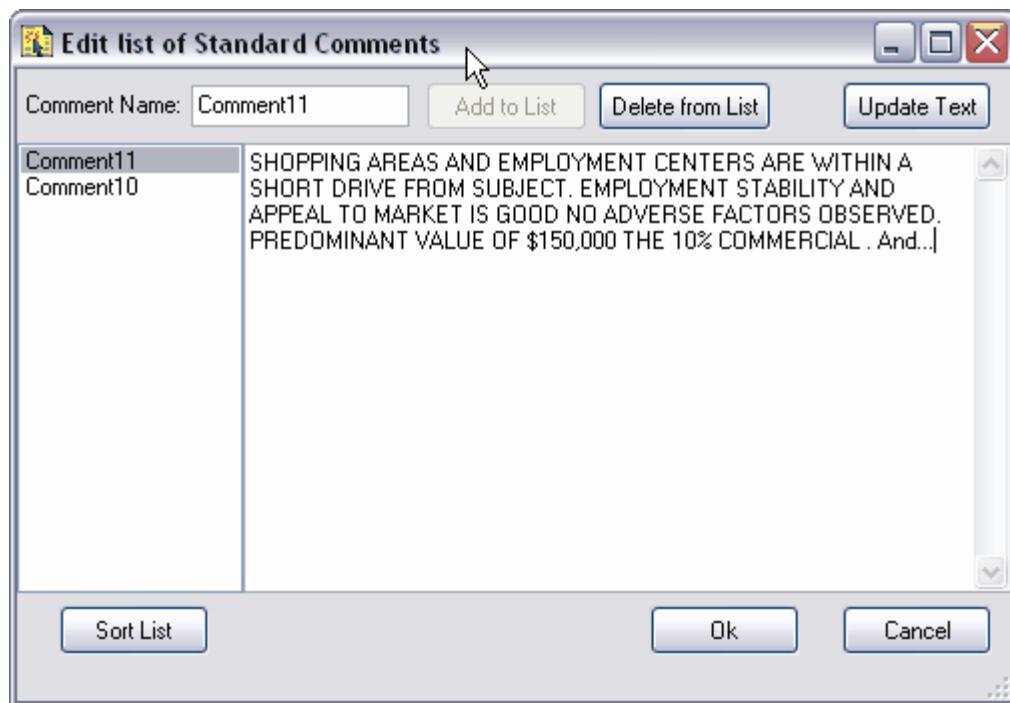
- To display the Standard Comments sheet:



- Click in a Comment cell to activate this feature.



1. Click on the Cells menu title in the menu bar.
2. Click on Edit Comments (or use the Ctrl+E keys).



Standard Comments Sheet: Select Comment

- ▶ When the Standard Comments sheet is displayed, make your desired changes.
- ▶ Use the [Add] button, [Delete] button, [Update] button and [Sort] button to modify your selections.
- ▶ Click on the [Ok] button to save your changes and proceed.

100,000	Comments on Cost Approach (such as, source of cost estimate, site value, square foot calculation and for HUD, VA and FmHA, the estimated remaining economic life of the property): The residential cost manual published by Huston & Goody Co determining the cost estimates in value. The age/life method is used depreciation.	Save as Comment
73,980		MLS data no agreement ▶
0		Cost Approach ▶
0		Well kept no probs ▶
0		Boundaries ▶
73,980		High Demand ▶
94,654		Finance Terms ▶
279,326		No Hazardous Waste ▶
0		As Is ▶
379,326	Est. Remaining Econ. Life: 60	Cost Approach HG ▶
NO. 1	COMPARABLE NO. 2	Cost Approach NBCM ▶
Villa Ave.	1242 Villa Ave.	

The 2002 National Building Cost Manual was used in

Insert Standard Comment

- ▶ Changes to your Standard Comments can now be inserted into any Comments cell.

### 3.5.4 Show Responses

#### The Show Responses Command

Use this command to activate the Responses menu for a selected cell.

#### Displaying Cell Responses

- To display the Responses for a selected cell:

Design and Appeal	Victorian			Similar		
Quality of Construction	Good			Average		
Age	23			25		
Condition	Good			Average		
Above Grade	Total	Bdrms	Baths	Total	Bdrms	Baths
Room Count	7	3	3.00	7	2	2.00
Gross Living Area	6,233 Sq. Ft			5,890 Sq. Ft		
Basement & Finished	0			0		
Rooms Below Grade						

Activated Response Cell

- Click inside the cell to activate it.



1. Click on the [Cells menu](#) title in the [menu bar](#).
2. Click on Show Responses (or use the [F12 key](#)).

Design and Appeal	Victorian			Similar		
Quality of Construction	Good			Average		
Age	Good			25		
Condition	Average			Average		
Above Grade	Poor	25			Average	
Room Count	Excellent	Total	Bdrms	Baths	2	2.00
Gross Living Area		6,233 Sq. Ft			5,890 Sq. Ft	
Basement & Finished		0			0	
Rooms Below Grade						

Displayed Cell Responses

- Responses for the selected cell will be displayed.

### 3.5.5 Save as Response

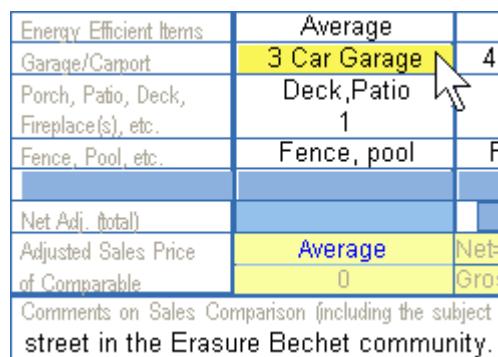
#### The Save as Response Command

Use this command to save the data entered in a cell as a Response.

#### Saving Data as a Response

► To save a Response:

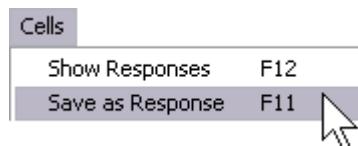
1. Click inside the cell to activate it.



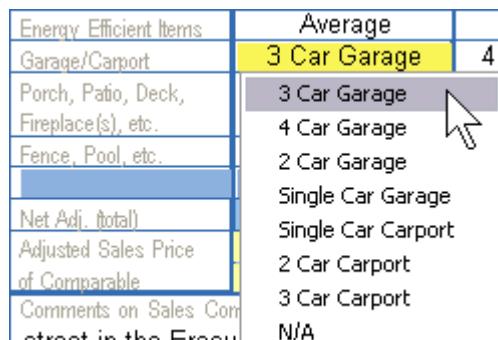
A screenshot of a spreadsheet application showing a dropdown menu for saving a response. The menu is open over a cell containing "3 Car Garage". The menu options are "Average" (highlighted), "3 Car Garage" (selected), and "Deck, Patio". Below the menu, there is a note: "Comments on Sales Comparison (including the subject street in the Erasure Bechet community.)".

Data Entered in Activated Response Cell

2. Type in the data that you will be saving, if you have not already done this.



3. Click on the Cells menu title in the menu bar.
4. Click on Save as Response (or use the F12 key).



A screenshot of a spreadsheet application showing a dropdown menu for selecting a saved response. The menu is open over a cell containing "3 Car Garage". The menu options are "3 Car Garage" (highlighted), "4 Car Garage", "2 Car Garage", "Single Car Garage", "Single Car Carport", "2 Car Carport", "3 Car Carport", and "N/A". Below the menu, there is a note: "Comments on Sales Comparison (including the subject street in the Erasure Bechet community.)".

Select Saved Response for Insertion

► The data will now be available for selection as a Response for this cell.

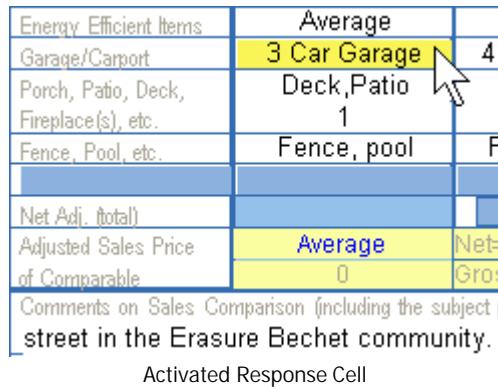
### 3.5.6 Edit Responses

#### The Edit Responses Command

This command displays the Standard Responses sheet, which is used for managing cell Responses.

#### Using the Edit Responses Command

- To display the Standard Responses sheet:

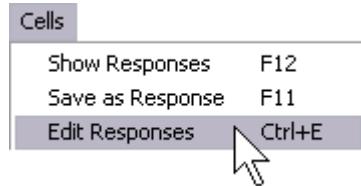


Energy Efficient Items	Average	
Garage/Carport	3 Car Garage	4
Porch, Patio, Deck, Fireplace(s), etc.	Deck,Patio	1
Fence, Pool, etc.	Fence, pool	F
Net Adj. (total)		
Adjusted Sales Price of Comparable	Average	Net=
	0	Gros

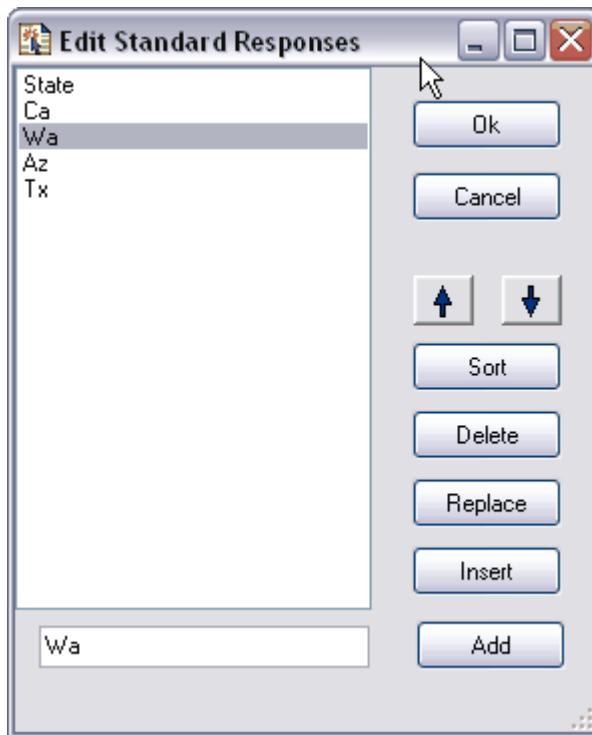
Comments on Sales Comparison (including the subject property's address):  
The subject property is located on a corner lot at 123 Main Street, in the Erasure Bechet community.

Activated Response Cell

- Click in the cell to activate it.



1. Click on the [Cells menu](#) title in the [menu bar](#).
2. Click on Edit Responses (or use the [Ctrl+E](#) keys).



Standard Responses Dialog

► When the Standard Responses sheet is displayed, make your desired changes.

1. Sort the responses in alpha-numeric order by clicking on the [Sort] button or use the Up/Down Arrows to move the Response you have Highlighted in the List.
2. Use the [Delete] button, [Replace] button and [Insert] button to make the desired changes.
3. Click on the [OK] button to proceed.

Average	
3 Car Garage	4
2 Car Carport	
2 Car Garage	
3 Car Carport	
3 Car Garage	
4 Car Garage	
5 Car Garage	
N/A	
Single Car Carport	
Single Car Garage	

Example: Select Standard Response

► Changes to the Standard Responses for that cell will be saved.

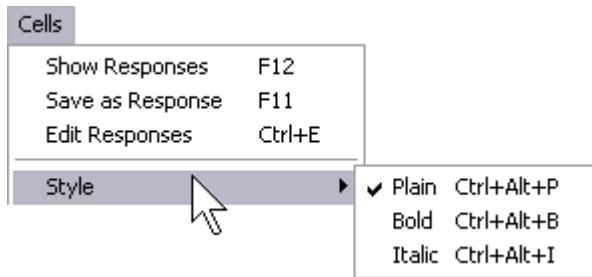
### 3.5.7 Style

#### Style Menu Commands

This menu selection contains three style options for formatting cell text.

#### Accessing the Style Menu

- To access the Style menu:



1. Click on the [Cells menu](#) title in the [menu bar](#).
2. Move the mouse cursor down to Style.



Font Style Console

- These commands can also be applied using a single click from [Toolbar Font Style Console](#)

### 3.5.7.1 Plain

#### The Plain Text Command

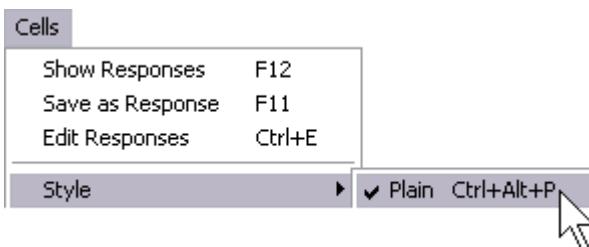
Use this command to remove style formatting for text in a cell.

#### Formatting the Cell Text Style to Plain

- To remove style formatting from the text in a cell:

Ford Capital Mortgage Co.  
Activated Cell

- Click inside the cell with text that you would like to reformat as plain.



1. Click on the Cells menu title in the menu bar.
2. Move the mouse cursor down to Style.
3. Click on Plain (or use the Ctrl+Alt+P keys).

Ford Capital Mortgage Co.  
Normal Cell Text

- Any style formatting for text in the cell will be removed.

### 3.5.7.2 Bold

#### The Bold Text Command

Use this command to apply bold style formatting to the text in a cell.

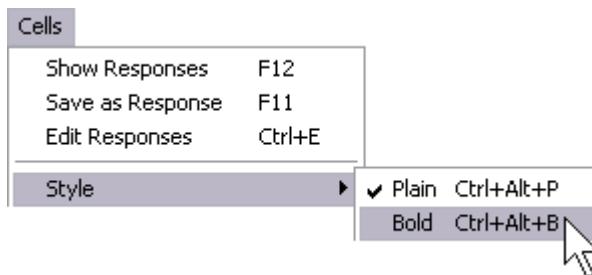
#### Applying Bold Format to the Cell Text

- ▶ To format cell text in bold:



Activated Comment Cell

- ▶ Click inside the cell with text that you would like to format to bold.



1. Click on the [Cells menu](#) title in the [menu bar](#).
2. Move the mouse cursor down to [Style](#).
3. Click on [Bold](#) (or use the [Ctrl+B](#) keys).



Bold Cell Text

- ▶ The text in the cell will be formatted to bold.

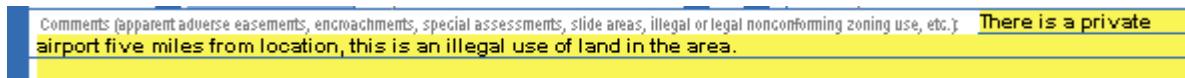
### 3.5.7.3 Italic

#### The Italic Text Command

Use this command to apply italic style formatting to the text in a cell.

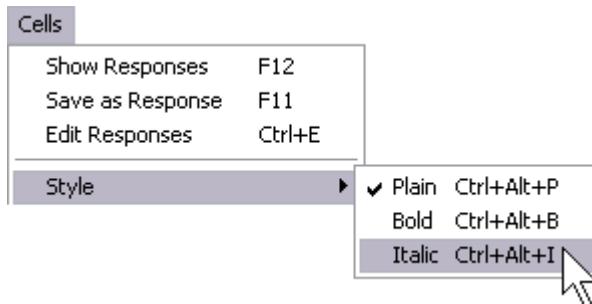
#### Applying Italic Format to the Cell Text

- To italicize cell text:

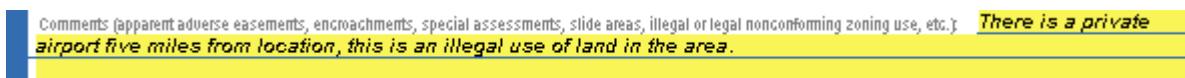


Activated Comment Cell

- Click inside the cell with text that you would like to italicize.



1. Click on the Cells menu title in the menu bar.
2. Move the mouse cursor down to Style .
3. Click on Italic (or use the Ctrl+I keys).



Italicized Cell Text

- The text in the cell will be italicized.

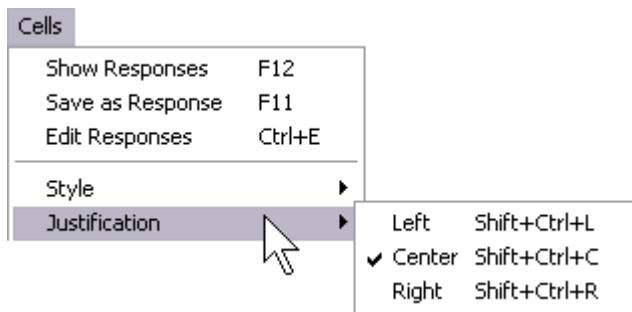
### 3.5.8 Justification

#### Justification Menu Commands

This menu selection contains three options for justifying the position of cell text.

#### Accessing the Justification Menu

- To access the Justification menu:



1. Click on the [Cells menu](#) title in the [menu bar](#).
2. Move the mouse cursor down to Justification.



- These commands can also be applied using a single click from the [Toolbar Alignment Console](#)

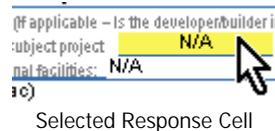
### 3.5.8.1 Left

#### The Justification Left Command

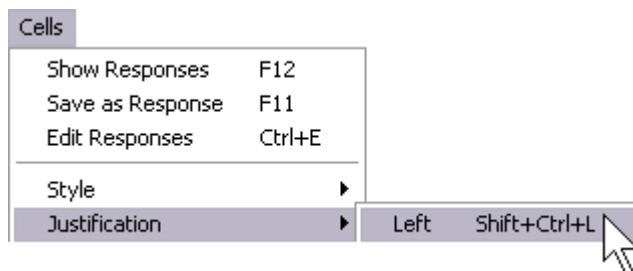
Use this command to left-align cell text.

#### Aligning Cell Text Left

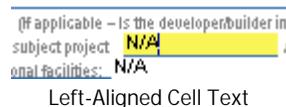
- To left-align cell text:



- Click inside the cell with text that you would like to align left.



1. Click on the Cells menu title in the menu bar.
2. Move the mouse cursor down to Justification.
3. Click on Left (or use the Shift+Ctrl+L keys).



- Text in the cell will be aligned left.

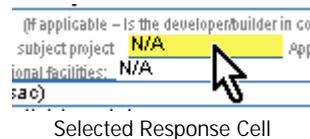
### 3.5.8.2 Center

#### The Justification Center Command

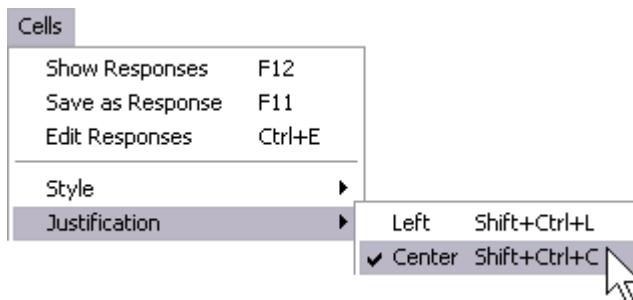
Use this command to center-align cell text.

#### Aligning Cell Text Center

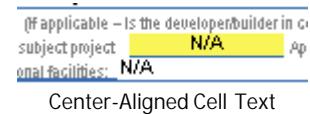
- ▶ To center-align cell text:



- ▶ Click inside the cell with text that you would like to align center.



1. Click on the Cells menu title in the menu bar.
2. Move the mouse cursor down to Justification.
3. Click on Center (or use the Shift+Ctrl+C keys).



- ▶ Text in the cell will be aligned center.

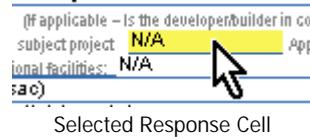
### 3.5.8.3 Right

#### The Justification Right Command

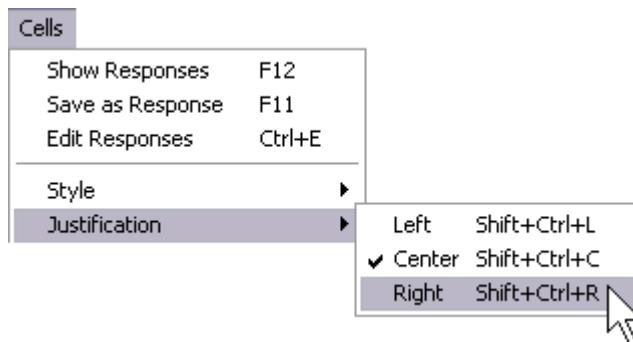
Use this command to right-align cell text.

#### Aligning Cell Text Right

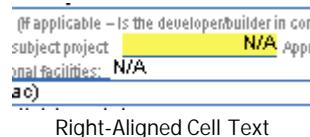
► To right-align cell text:



► Click inside the cell with text that you would like to align right.



1. Click on the Cells menu title in the menu bar.
2. Move the mouse cursor down to Justification.
3. Click on Right (or use the Shift+Ctrl+R keys).



► Text in the cell will be aligned right.

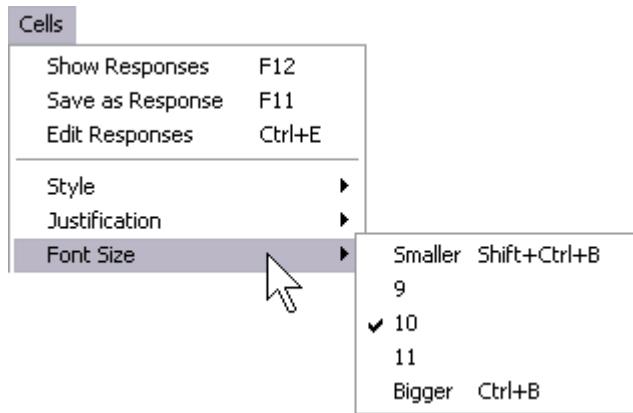
### 3.5.9 Font Size

#### Font Size Menu Commands

This menu selection contains font size options which can be used for fitting text blocks into cells.

#### Accessing the Font Size Menu

- To access the Font Size menu:



1. Click on the [Cells menu](#) title in the [menu bar](#).
2. Move the mouse cursor down to Font Size.



Font Size Console

- These commands can also be applied using a single click from [Toolbar Font Size Console](#)

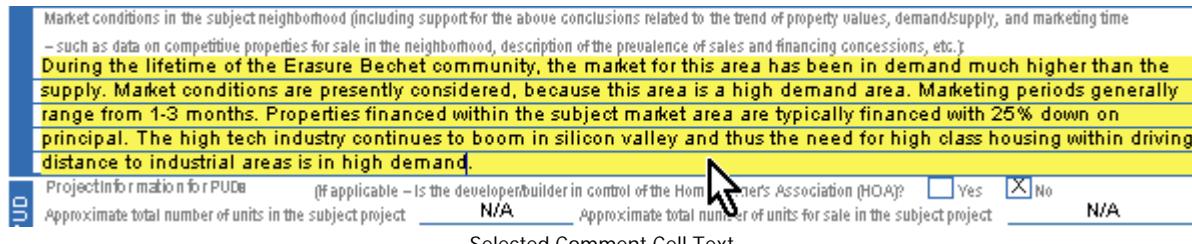
### 3.5.9.1 Smaller

#### The Smaller Font Size Command

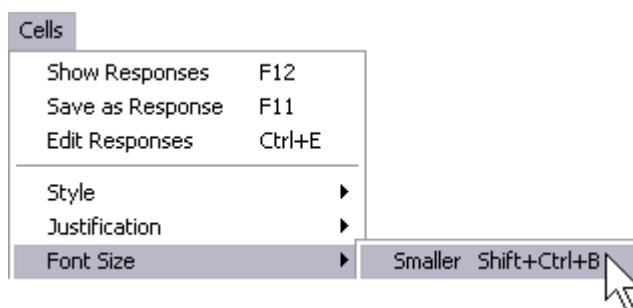
Use this command to decrease the size of text in a cell.

#### Decreasing Font Size

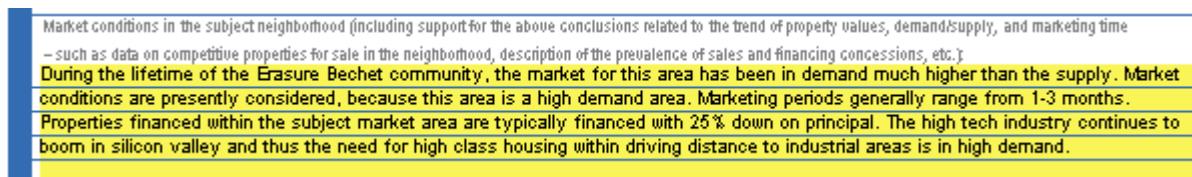
- To decrease the size of your text:



- Click inside the cell with text that you would like to decrease in size.



1. Click on the Cells menu title in the menu bar.
2. Move the mouse cursor down to Font Size.
3. Click on Smaller (or use the Ctrl+[ keys).



Decreased Font Size

- The font size of your cell text will be decreased.
- Repeating this command will decrease cell text font size incrementally each time.

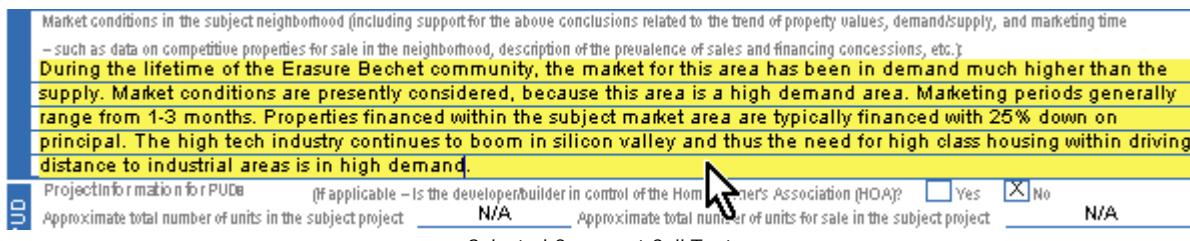
### 3.5.9.2 9

#### The Font Size 9 Command

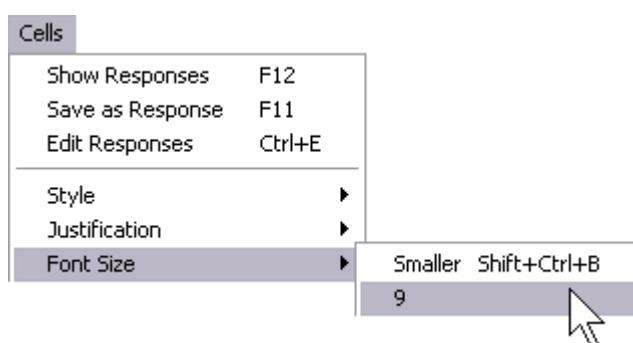
Use this command to apply font size 9 to the text in a cell.

#### Applying Font Size 9

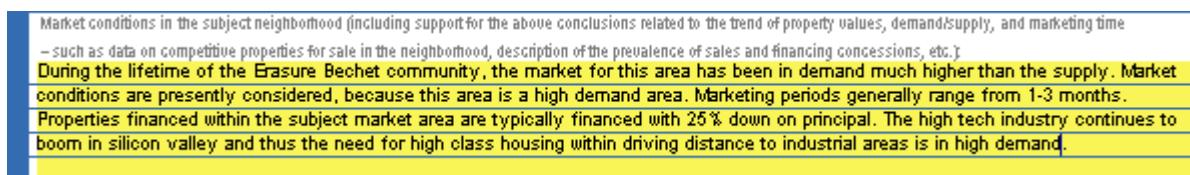
- To change the size of your cell text to 9:



- Click inside the cell with text that you would like to format.



1. Click on the Cells menu title in the menu bar.
2. Move the mouse cursor down to Font Size.
3. Click on 9.



Size 9 Comment Cell Text

- Cell text will resize to 9.

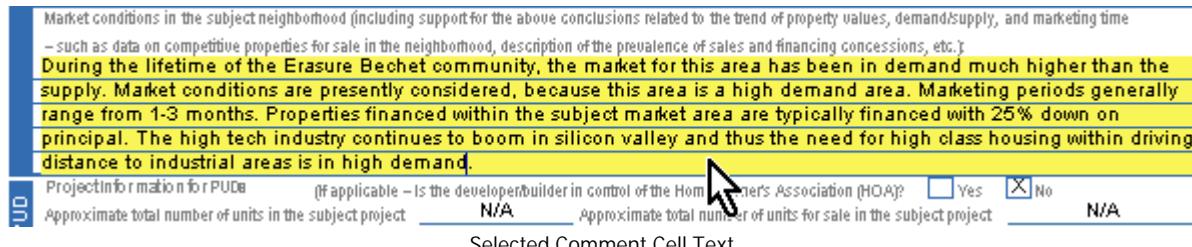
### 3.5.9.3 10

#### The Font Size 10 Command

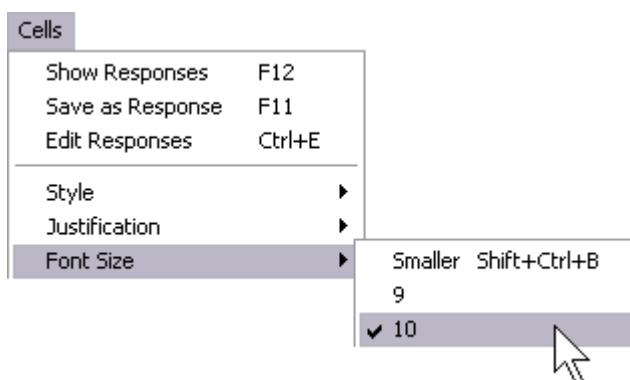
Use this command to apply font size 10 to the text in a cell.

#### Applying Font Size 10

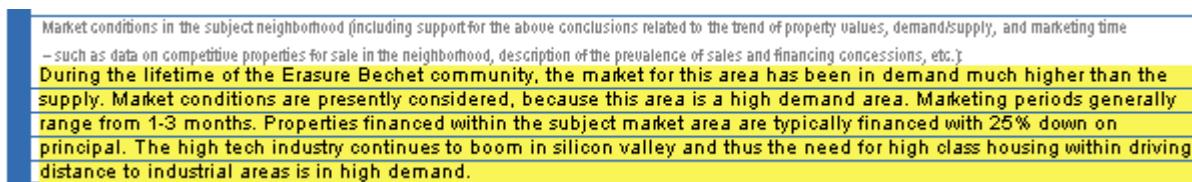
- To change the size of your cell text to 10:



- Click inside the cell with text that you would like to format.



1. Click on the Cells menu title in the menu bar.
2. Move the mouse cursor down to Font Size.
3. Click on 10.



- Cell text will resize 10.

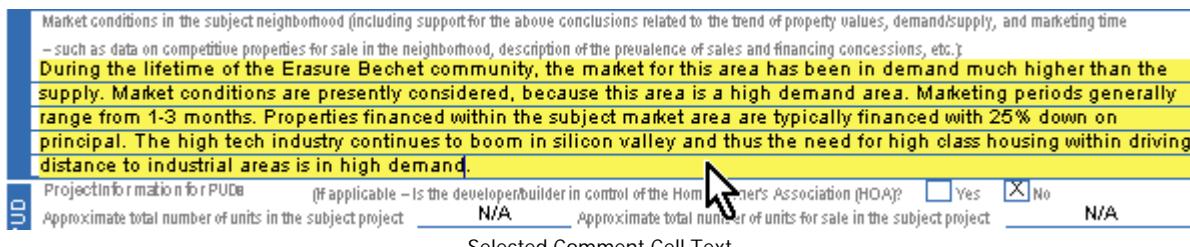
### 3.5.9.4 Bigger

#### The Bigger Font Size Command

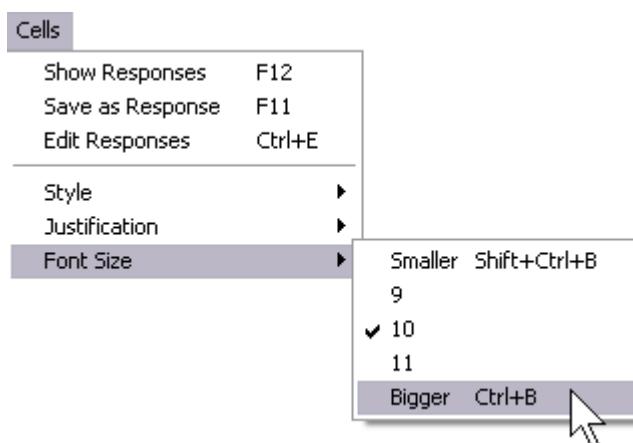
Use this command to increase the size of text in a cell.

#### Increasing Font Size

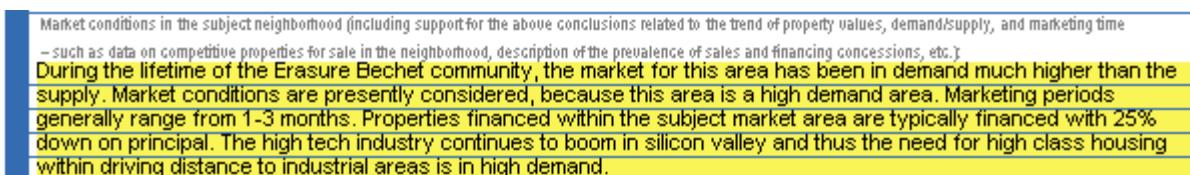
- To increase the size of your text:



- Click inside the cell with text that you would like to increase in size.



1. Click on the Cells menu title in the menu bar.
2. Move the mouse cursor down to Font Size.
3. Click on Bigger (or use the Ctrl+] keys).



Increased Font Size

- The font size of your cell text will be increased.

► Repeating this command will increase cell text font size incrementally at each application.

### 3.5.10 Auto Adjustments

#### The Auto Adjustments Command

Use this command to enable Auto Adjustments for the Comparison Grid.

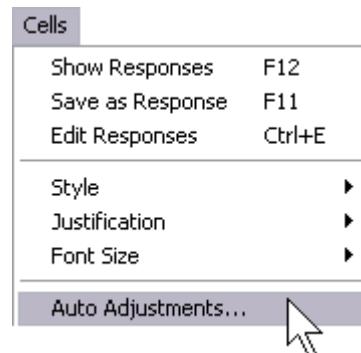
#### Using the Auto Adjustments Command

- To set auto adjustments for the Comparison Grid:

COMPARABLE NO. 1			COMPARABLE NO. 2			COMPARABLE NO. 3		
5030 NW 21ST AVE MIAMI			1978 NW 48TH ST MIAMI			5026 NW 23RD AVE MIAMI		
6 BLOCKS AWAY			4 BLOCKS AWAY			4 BLOCKS AWAY		
\$ 66.82			\$ 68.99			\$ 84.66		
ISC/Inspection FARES			ISC/Inspection ISC/MLS			ISC/Inspection ISC/MLS		
DESCRIPTION	+(\$ Adjustment)		DESCRIPTION	+(\$ Adjustment)		DESCRIPTION	+(\$ Adjustment)	
Conventional Mortgage			Conventional Mortgage			Conventional Mortgage		
06/2001			04/2001			01/2001		
Suburban			Suburban			Suburban		
Fee Simple			Fee Simple			Fee Simple		
5,800 SQ. FT.	+630		4,796 SQ. FT.	+10,670	10,800 SQ. FT.	-49,3		
STREET			STREET			STREET		
RANCH			RANCH			RANCH		
Average			Average			Average		
1936	+10		1940	+50	1952	+1		
GOOD			GOOD			Good		
Total Bdms	Baths		Total Bdms	Baths		Total Bdms	Baths	
6	3	2.00	0	6	3	2.00	0	6
1.347 Sq Ft			1.290 Sq Ft			-2.090	1.004 Sq Ft	
								+7

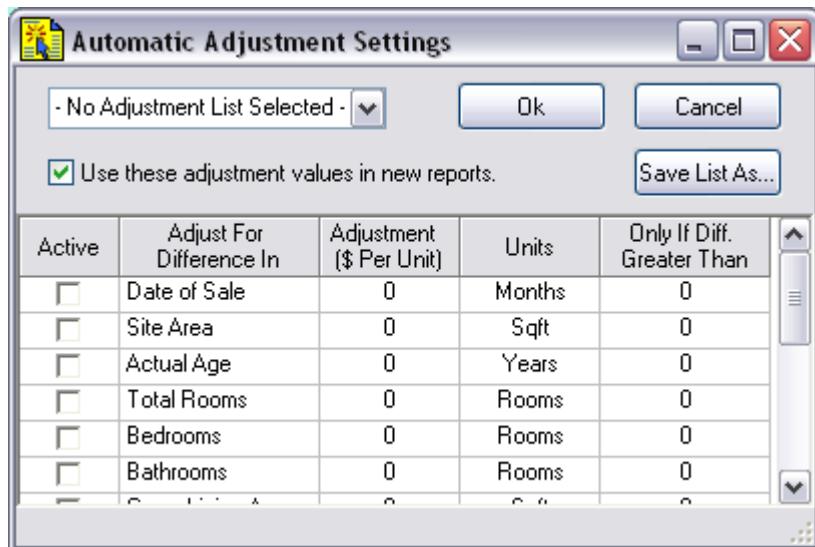
The Comparison Grid

1. Click on the Cells menu title in the menu bar.
2. Click on "Auto Adjustments...".



- The Automatic Adjustment Settings Window is displayed:

1. Populate each row in the table with the required parameters i.e. \$ Per Unit.
2. Select the check box next to the rule you would like to apply.
3. Select the Check Box next to "Use these adjustment values in new Reports", if necessary.
4. Click on the [Ok] button to proceed.
5. Click [Save List as], if you wish to Save and reuse this Adjustment List.



Automatic Adjustment Settings Window

- ▶ The Adjustments will now automatically be applied to the Report you are working on.

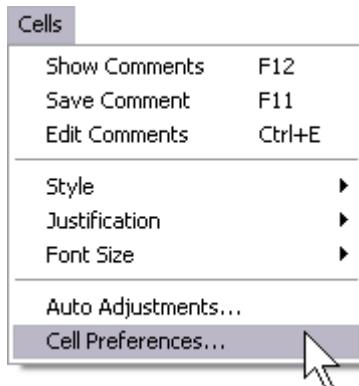
### 3.5.11 Cell Preferences

#### The Cell Preferences Command

The Cell Preferences command is used to configure settings for cell functionality and appearance:

#### Accessing Cell Preferences

- To configure and set the parameters for any cell:



1. Click on the [Cells menu](#) title in the [menu bar](#).
2. Click on "Cell Preferences...".
3. When the Cell Preference sheet is displayed:

- Configure:

- [General Cell Preferences](#)
- [Number Cell Preferences](#)
- [Date Cell Preferences](#)
- [Graphic Cell Preferences](#)

- Click on the [OK] button to save changes and exit.

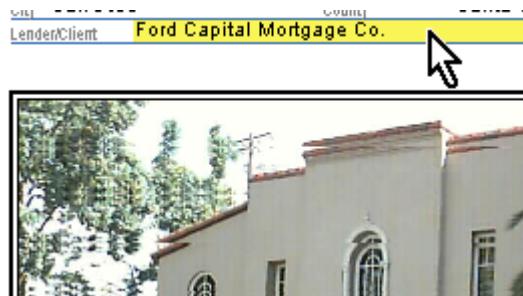
► You can set [number](#), [date](#), and certain [general preferences](#) for any cell, with the exception of a cell that will be holding [graphics](#). Remember to click in the cell first, then select Cell Preferences from the [Cells menu](#).

### 3.5.11.1 General

#### Configuring General settings in Cell Preferences

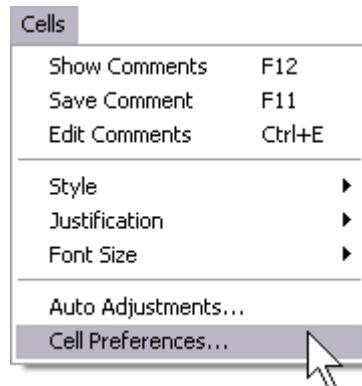
To configure and set general parameters for a cell:

- ▶ Click inside the cell you would like to configure.



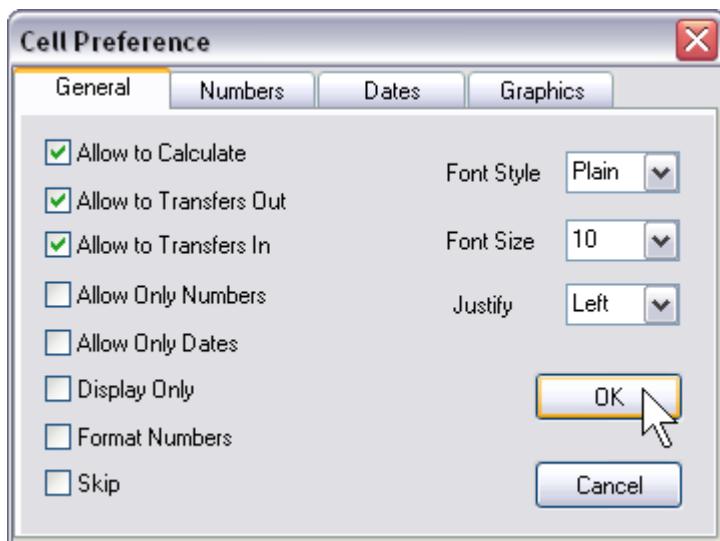
Cell Activated for Configuration

1. Click on the Cells menu title in the menu bar.
2. Click on "Cell Preferences...".



When the Cell Preference sheet is displayed:

- ▶ Use the default General tab page.



Cell Preferences: General

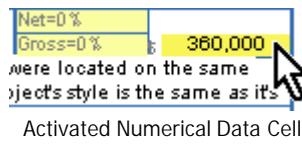
- Make changes and click on the [OK] button to configure the cell.

### 3.5.11.2 Numbers

#### Configuring Numbers in Cell Preferences

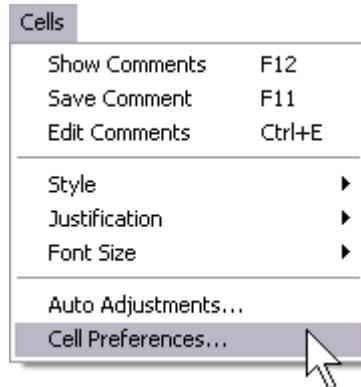
To configure and set parameters for a cell with numerical data:

- ▶ Click inside a cell with numerical data.



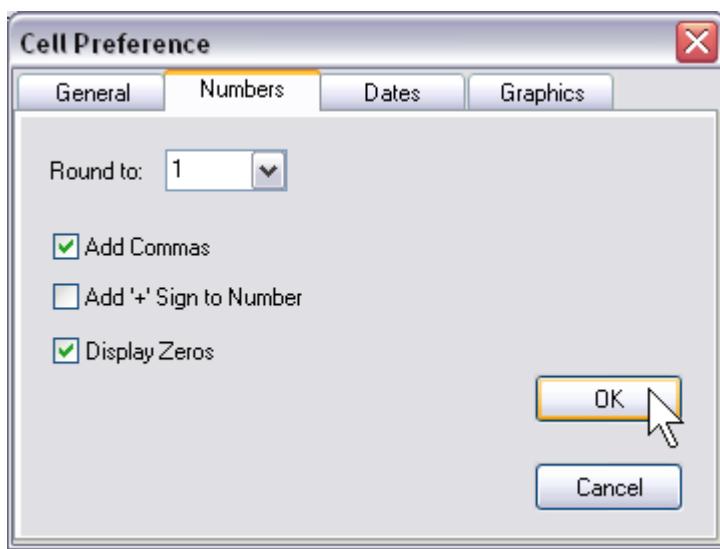
Activated Numerical Data Cell

1. Click on the [Cells menu](#) title in the [menu bar](#).
2. Click on "Cell Preferences...".



When the Cell Preference sheet is displayed:

- ▶ Select the Numbers tab page.



Cell Preferences: Numbers

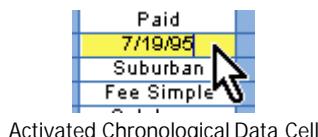
- ▶ Make changes and click on the [OK] button to configure the cell.

### 3.5.11.3 Dates

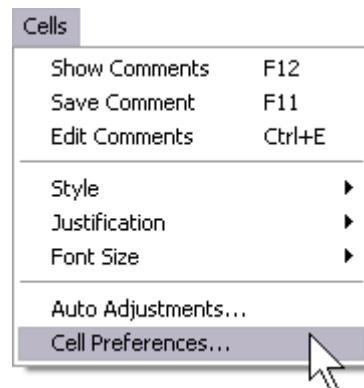
#### Configuring Date in Cell Preferences

To configure and set parameters for a cell with chronological data:

- ▶ Click inside a cell with chronological data.

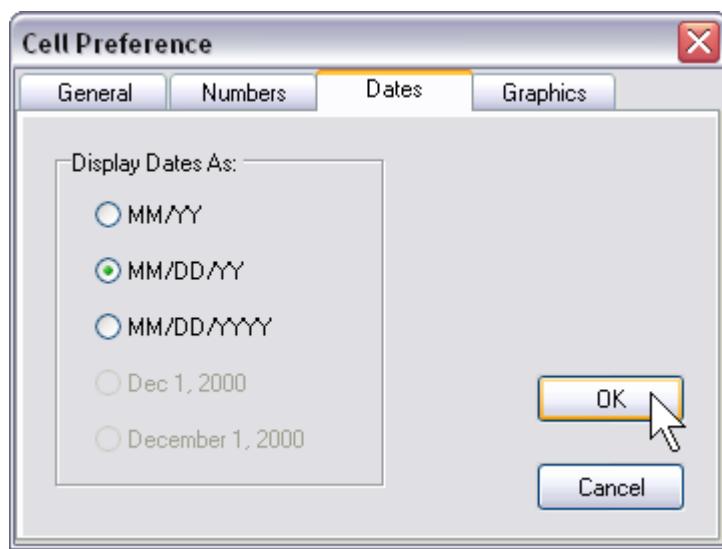


1. Click on the Cells menu title in the menu bar.
2. Click on "Cell Preferences...".



When the Cell Preference sheet is displayed:

- ▶ Select the Dates tab page.



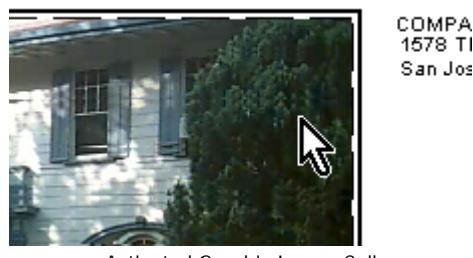
- ▶ Make changes and click on the [OK] button to configure the cell.

### 3.5.11.4 Graphics

#### Configuring Graphics in Cell Preferences

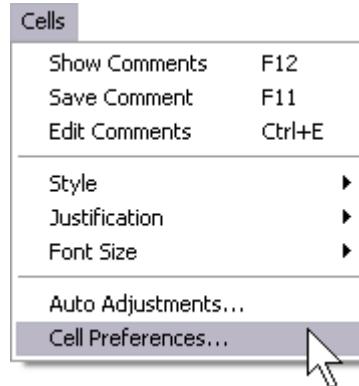
To configure and set parameters for cells with graphic images:

- ▶ Click inside a cell with a graphic image.



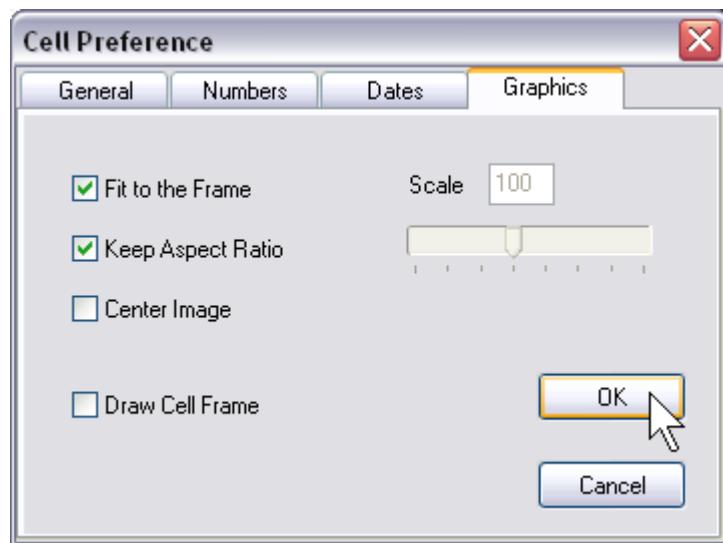
Activated Graphic Image Cell

1. Click on the [Cells menu](#) title in the [menu bar](#).
2. Click on "Cell Preferences...".



When the Cell Preference sheet is displayed:

- ▶ Select the Graphics tab page.



Cell Preferences: Graphics

- Make changes and click on the [OK] button to configure the cell.

## 3.6 The Lists Menu

### Lists Menu Functions

This menu displays a list of commands for Opening and viewing your Client, Report and Comparables Lists.

### Accessing the Lists Menu

- ▶ To access the Lists Menu:



- ▶ Point your cursor to the Lists menu title in the menu bar and click once on the List item you wish to Open.

### 3.6.1 Client List

#### The Clients List Command

This command will launch the Client List.

#### Launching the List of Clients

► To launch the List of Clients:

1. Click on the [Lists menu](#) from the [menu bar](#).
2. Move the mouse cursor down to the First selection.
3. Click on Clients.



The Lists Menu

4. The Client List will Open with the Contact Info Tab Selected displaying all the Contact Information on the Selected Client.

A screenshot of a Windows application window titled "Client List". The window has several buttons at the top: "New", "Save", "Delete", "Transfer", and "Close". Below these buttons is a toolbar with icons for "New", "Save", "Delete", "Transfer", and "Close". The main area of the window is divided into two tabs: "Contact Info" (which is selected) and "Preference". Under the "Contact Info" tab, there are several input fields: "Quick Lookup Identifier" (containing "ABank of Washtenaw"), "Mr/Mrs" (radio button for "Mr."), "First Name" (text box containing "Thomas M."), "Last Name" (text box containing "Gotelaere"), "Company" (text box containing "ABank of Washtenaw"), "Address" (text box containing "450 E. Michigan Ave."), "City" (text box containing "Saline"), "State" (dropdown menu containing "MI"), "Zip" (text box containing "48176"), "Phone" (text box containing "734-944-6744"), "Fax" (text box containing "734-429-9294"), "Cell Ph." (text box), "Pager" (text box), and "E-Mail" (text box). At the bottom left of the window, there is a message "Number of Clients: 199".

The Clients List Contact Info Window

- The Clients List Window will enable you to access and administrate your Client data.
- After completing Clients List operations, click on the [Close] button to proceed.

### 3.6.2 Comparables List

#### The Comparables List Command

This command will launch the property sheet used to administrate your List of Comparables.

#### Launching the List of Comparables

- To launch the List of Comparables property sheet:

1. Click on the [Lists menu](#) from the [menu bar](#).
2. Move the mouse cursor down to the Third selection.
3. Click on Comparables.



The Lists Menu

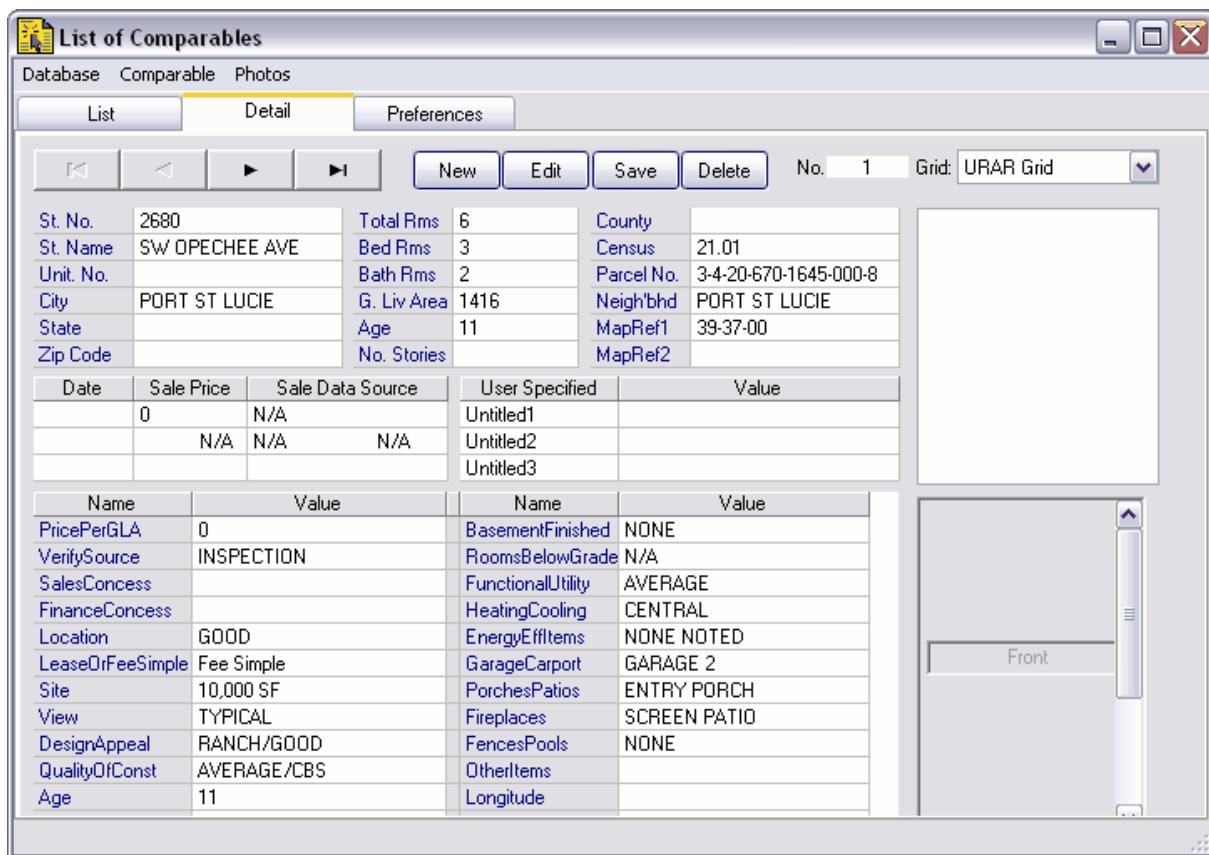
- The List of Comparables "List Tab" will open by Default.

A screenshot of the "List of Comparables" application window. The window title is "List of Comparables". The menu bar includes "Database", "Comparable", and "Photos". The main area has three tabs: "List" (selected), "Detail", and "Preferences". Below the tabs is a header row with columns: Street #, Street Name, City, St, Zip, and Tot. The main data grid displays several rows of address information. The first row, "2680 SW OPECHEE AVE", is selected and highlighted with a gray background. The "Street #" column header is also highlighted with a gray background.

Street #	Street Name	City	St	Zip	Tot.
2680	SW OPECHEE AVE	PORT ST LUCIE			
2680	SW OPECHEE AVE	PORT ST LUCIE			
12688	CLASSIC DRIVE	CORAL SPRINGS			
522	N LEAVITT AVENUE	ORANGE CITY			
219	SE 23rd Avenue	Boynton Beach			
119-A	COUNTRY CLUB ESTATES -				
100	Ocean Trail Way 1107 - 11				
6260A	& 6260B ARIZONA ST	BONNERS FERRY, ID 83805			
2680	SW OPECHEE AVE	PORT ST LUCIE			

The Comparables List View Window

- View of The "Details Tab" Selected displaying all the Information contained in the Selected Comparable Record:



The Comparables Detail View Window

- ▶ The List of Comparables Window will enable you to access and administrate your Comparables data.
- ▶ After completing List of Comparables operations, click on the [Close] button to proceed.

### 3.6.3 Report List

#### The Reports List Command

This command will launch the Grid sheet used to administrate your List of Reports.

#### Launching the List of Reports

- To launch the List of Reports List:

1. Click on the [Lists menu](#) from the [menu bar](#).
2. Move the mouse cursor down to the Second selection.
3. Click on Reports.



The Lists Menu

- Your Reports List is now Opened and ready for use.

A screenshot of the 'List of Reports' window. The window title is 'List of Reports'. At the top, there are buttons for 'New', 'Delete', 'Open as Clone', 'Open', and 'Close'. Below the buttons, there are two tabs: 'Reports' (which is selected) and 'Preferences'. A message 'Drag a column header here to group by that column' is displayed above a grid. The grid has columns labeled 'Type', 'FileNo', 'SearchKeyWords', 'Street No.', and 'City'. There are six rows of data:

Type	FileNo	SearchKeyWords	Street No.	City
URAR	1001-NV.u2d		2680	PORT ST LUCIE
URAR	1001-NV.u2d		2680	PORT ST LUCIE
2055	WOODLAND.303		3540	CARLSBAD
2055	WOODLAND.303		3540	CARLSBAD
URAR	453w543543			igvjhgjh
URAR	453w543543			igvjhgjh

Total Reports: 577

The Reports List Window

- The Reports List Window will enable you to access and administrate your reports data.
- After completing Reports List operations, click on the [Close] button to proceed.
- View additional Topic related to this at Report [Properties](#)

## 3.7 The Insert Menu

### Insert Menu Functions

This Menu displays a list of commands for Inserting Images in to your Report.

### Accessing the Insert Menu

- ▶ To access the Insert Menu:



- ▶ Point your cursor to the Insert menu title in the [menu bar](#) and click once on the item you wish to Open.

### 3.7.1 Insert Image from File

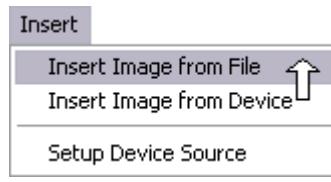
#### The Insert an Image from File Command

This command will launch the "Select an Image File" Browser used to the Drive and Folder you store your images in. You can also Browse to your USB Connected Camera or Card Reader if it shows up as a Drive i.e. E or F etc and select an image directly.

#### Launching Insert Images from File:

##### ► To Launch the Insert Images from File:

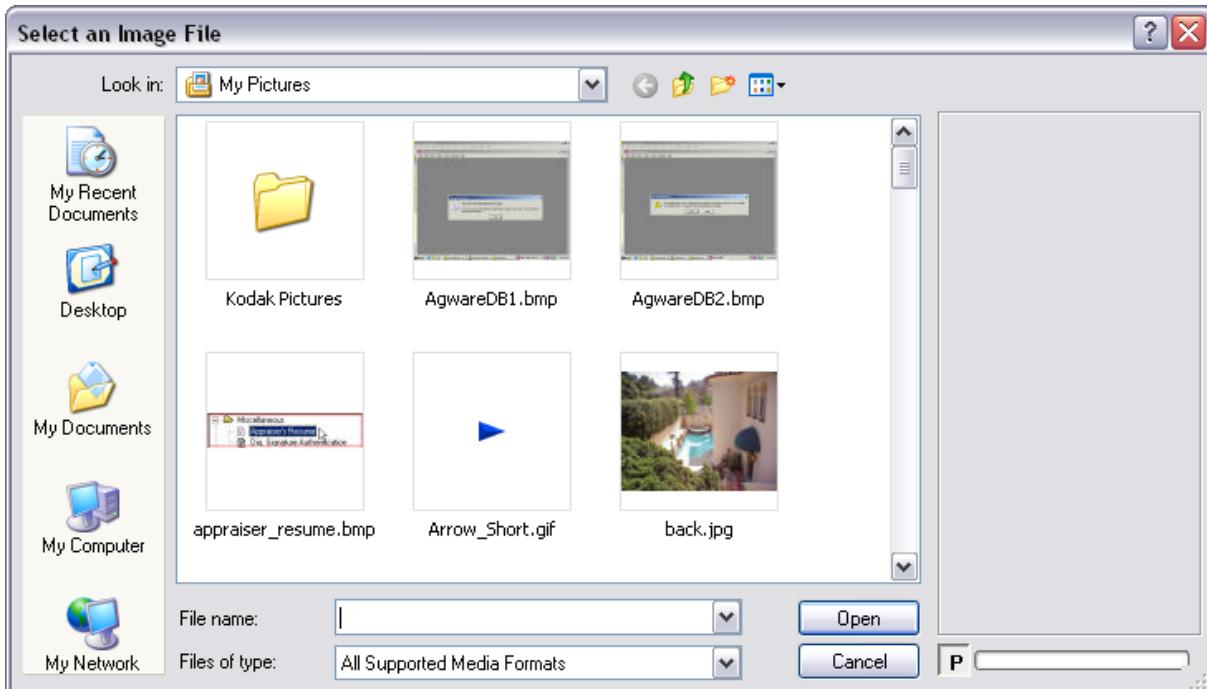
1. Click on the Insert Menu from the Menu Bar.
2. Move the mouse cursor down to the first selection.
3. Click on Insert Image from File.



The Insert Menu

##### ► The "Select an File Image" Browser Window will Open.

1. Browse to the Drive, Folder and Image File you wish to use by using the "Look in:" Window.
2. Click on the Image File you want to use to Select it.
3. Click on [Open] and your image will Transfer to the Report area you are in.



The Select and Image File Window

### 3.7.2 Insert Image from Device

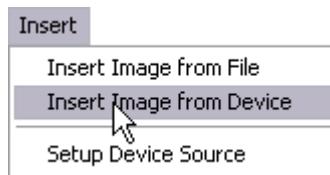
#### The Insert Image from Device Command

This command will launch the "Insert from Image Device" Window.

#### Launching Insert Image from Device:

##### ► To Launch the Insert Image from Device:

1. Click on the [Insert menu](#) from the [Menu Bar](#).
3. Move the mouse cursor down to the Second selection.
4. Click on Insert Image from Device.



The Insert Menu

### 3.7.3 Setup Device Source

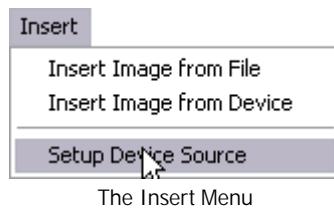
#### The Setup Device Command

This command will launch the "Setup Device Source" Window. You can select and setup the Device you wish to use.

#### Launching the Select Device Source:

##### ► To Launch the Select Device Source:

1. Click on the [Insert Menu](#) from the [menu bar](#).
3. Move the mouse cursor down to the Third selection.
4. Click on Setup Device Source.



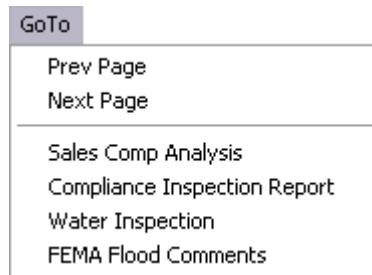
## 3.8 The GoTo Menu

### GoTo Menu Commands

This menu displays commands for browsing through your page-view history and navigating to bookmarks that have been set in a selected report.

### Accessing the GoTo Menu

- ▶ To access the GoTo Menu:



- ▶ Point your cursor to the GoTo menu title in the [menu bar](#) and click once.

### 3.8.1 Prev Page

#### The GoTo Prev Page Command

Use this command to navigate to the previous page in a selected report.

#### Ascending the Form Order in a Report

- ▶ To go to the previous page:



1. Click on [GoTo](#) from the [menu bar](#).
  2. Click on Prev Page.
- ▶ The previous page in your report will be displayed in the [Workspace](#).

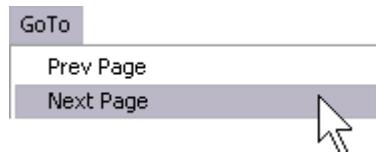
### 3.8.2 Next Page

#### The GoTo Next Page Command

Use this command to view the next page in a selected report.

#### Descending the Form Order in a Report

- ▶ To go to the next page:



1. Click on GoTo from the menu bar.
2. Click on Next Page.

- ▶ The next page in your report will be displayed in the Workspace.

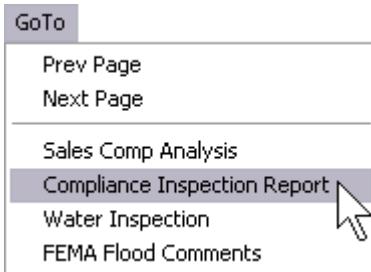
### 3.8.3 Marker Names

#### The GoTo Bookmark Command

Use this command to jump to any [Bookmark](#) that you have set in a report by clicking on its Marker Name in the [GoTo Menu](#).

#### Jumping to a Bookmark

- To jump to a [Bookmark](#):



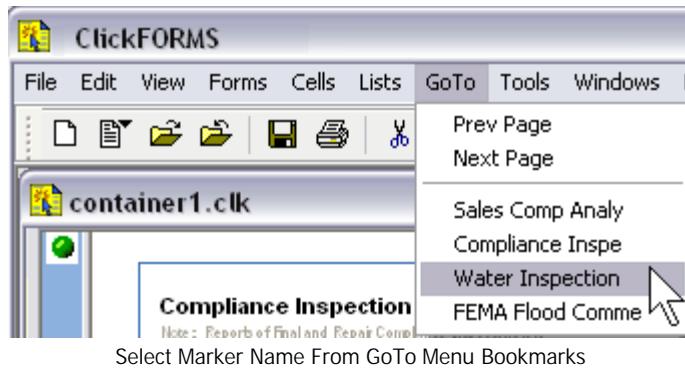
1. Click on [GoTo](#) from the [menu bar](#).
2. Click on any [Marker Name](#).

► You will jump to the corresponding Bookmark in the selected report. See the example below:

A screenshot of the ClickFORMS software window titled '[container1.clk]'. The menu bar includes File, Edit, View, Forms, Cells, Lists, GoTo, Tools, Windows, Help. The toolbar has icons for file operations. The main area displays a 'Compliance Inspection Report' document. At the top right of the document, there is a section for 'U.S. Department of Housing and Urban Development' and 'Office of Housing Federal Housing Commissioner'. Below this, there are sections for 'Builder's Name and Address' (Apple Homes, 1967 Penny Lane, Cupertino, CA 95014) and 'Mortgage's Name and Address' (ABN AMRO North America, Inc., P.O. Box 5065, Troy, MI 48007-5065). On the right side of the document, there is a table with rows for 'Report not flatfile' and 'Report not official without reviewer's signature'. At the bottom, there is a section titled 'I. Inspection of On-Site Improvements Reveals:' with several checkboxes. The status bar at the bottom left shows 'Pages: 25'.

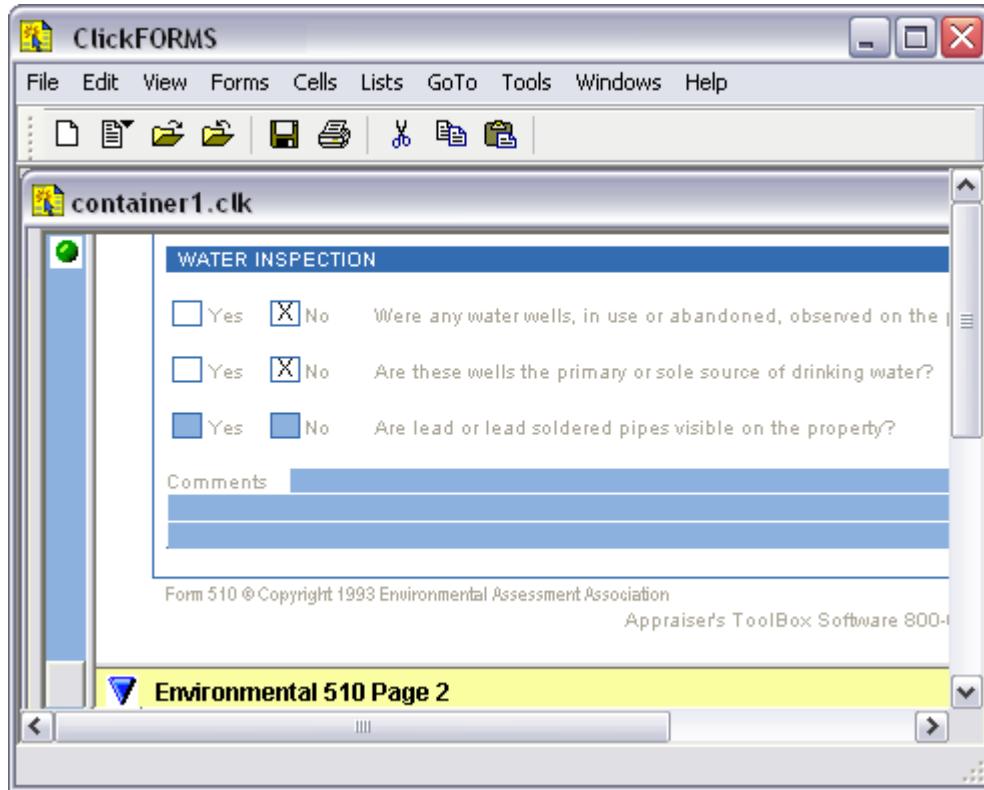
Example: Bookmark Location

- You can jump to another Bookmark by repeating the above procedure and clicking on a different Marker Name in the GoTo menu.



Select Marker Name From GoTo Menu Bookmarks

- When the selected location displays, the Bookmark will appear at the top of your Workspace. In the example below, the Water Inspection section on Page One of this report's Environmental 510 form has been Bookmarked.



Example: Alternate Bookmark

- Marker Names will only appear in the GoTo menu when you select reports that have Bookmarks.

## 3.9 The Tools Menu

### Tools Menu Commands

This menu displays a list of commands for launching [Built-In Tools](#) (i.e., [PhotoSheet](#), [Spell Check](#), WinSketch, etc.), [Plug-In Tools](#) (i.e., GeoLocator, Delorme Street Atlas USA, etc.) and [User-Specified Tools](#) (i.e., Microsoft ® Excel, Calculator, etc.).

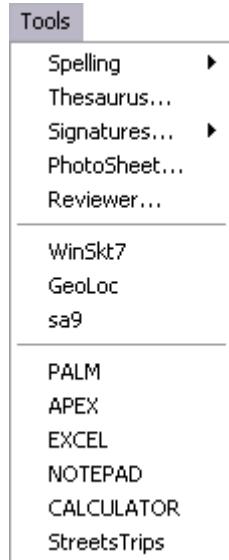
Built-In Tools: Programs included with this software that extend it's features and capabilities.

Plug-In Tools: Programs that integrate with this software, but are installed separately.

User-Specified Tools: Any program of your choice that is not integrated with this software.

### Accessing the Tools Menu

► To access the Tools Menu:



► Point your mouse cursor to the Tools menu title in the [menu bar](#) and click once.

### 3.9.1 Spelling

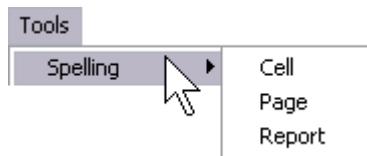
#### Spelling Menu Commands

The Spelling menu selection offers three operations for spell checking text:

- [Cell](#)
- [Page](#)
- [Report](#)

#### Accessing the Spelling Menu

► To access the Spelling menu:



1. Click on the [Tools menu](#) title in the [menu bar](#).
2. Move the mouse cursor down to Spelling.

### 3.9.1.1 Cell

#### Spell Check: Cell

Use this command to spell check text in a cell.

#### Spell Checking Cell Text

► To Spell Check the text in a cell:

► Click inside the cell with text that needs spell checking.

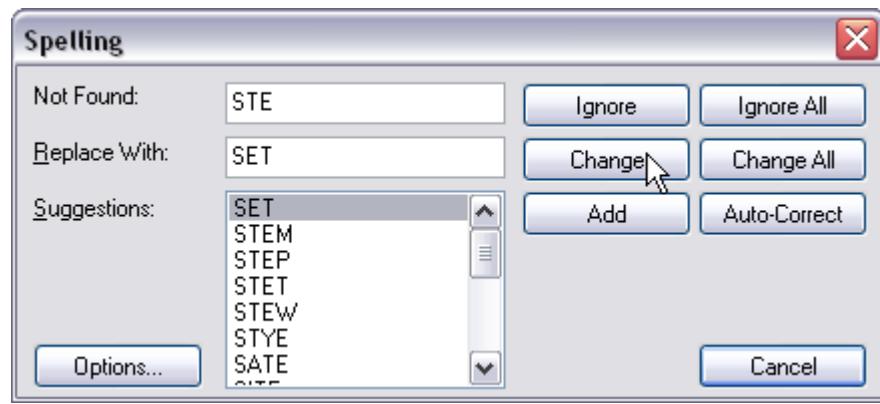


1. Click on the Tools menu title in the menu bar.
2. Move the mouse cursor down to Spelling.
3. Click on Cell.



► The Spell Check Tool will be displayed.

1. Spell Check will display a list of suggestions: click on the correct word.
2. Click on the [Change] button to correct the misspelling.



Spell Check Tool: Change

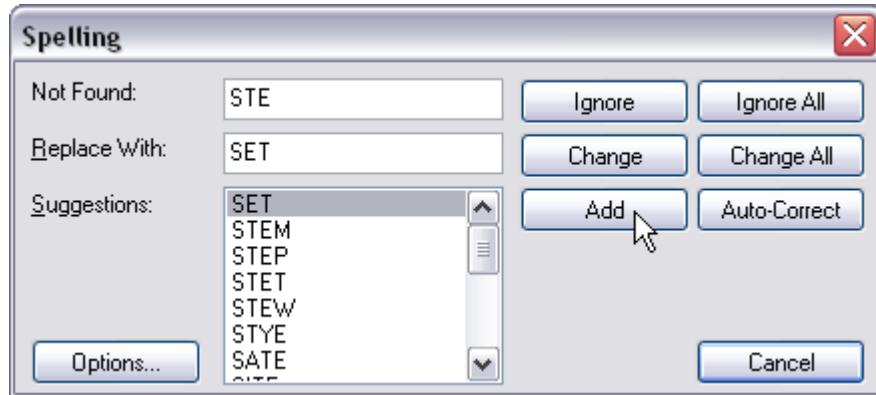
► The misspelled cell text will be corrected.

e neighborhood are not appraisal factors.  
The subject neighborhood's boundaries are as follows: NORTH by Westwood st.,  
rsity Ave., and West by Iguana Lake.

ties in the neighborhood to employment and amenities, employment stability, appeal to market, etc.

Corrected Cell Spelling

- To add terms, proper names or geographical locations, click on the [Add] button.



Spell Check Tool: Add

- The Spell Check Complete dialog will be displayed:

- Immediately, if there are no misspelled words in your selection.
- After you make a change, if there are no more spelling errors.

- Click on the [OK] button to close Spell Check and return to your report



Spell Check Complete Dialog

### 3.9.1.2 Page

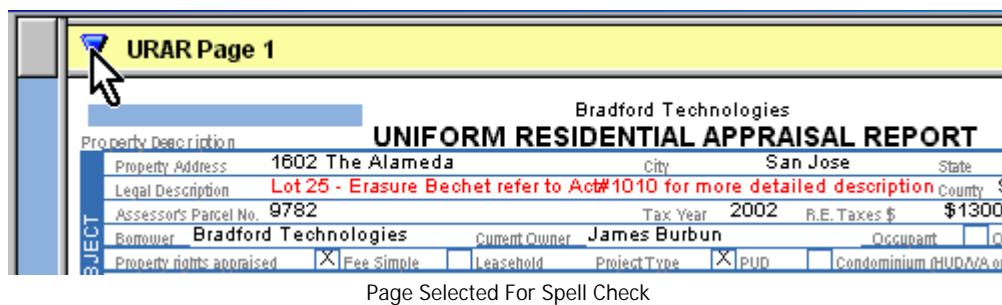
#### Spell Check: Page

Use this command to Spell Check the text of your report one page at a time.

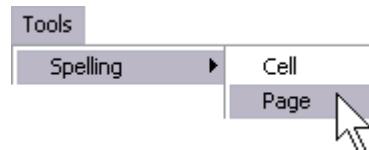
#### Spell Checking Page Text

► To Spell Check the text on a page:

► Display on the page with text that you would like to Spell Check in your [Workspace](#).

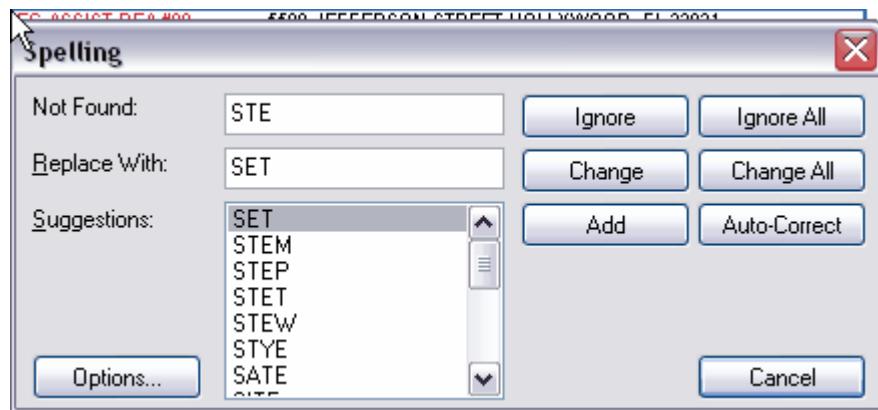


1. Click on the [Tools menu](#) title in the [menu bar](#).
2. Move the mouse cursor down to [Spelling](#).
3. Click on Page.



► The Spell Check Tool will be displayed.

1. Spell Check will display a list of suggestions: click on the correct word.
2. Click on the [Change] button to correct the misspelling.
3. Repeat the process until all spelling errors on the page have been corrected.



Spell Check Tool: Start

► The Spell Check Complete dialog will be displayed:

- Immediately, if there are no misspelled words in your selection.
- After you make a change, if there are no more spelling errors.

► Click on the [OK] button to close Spell Check and return to your report



Spell Check Complete Dialog

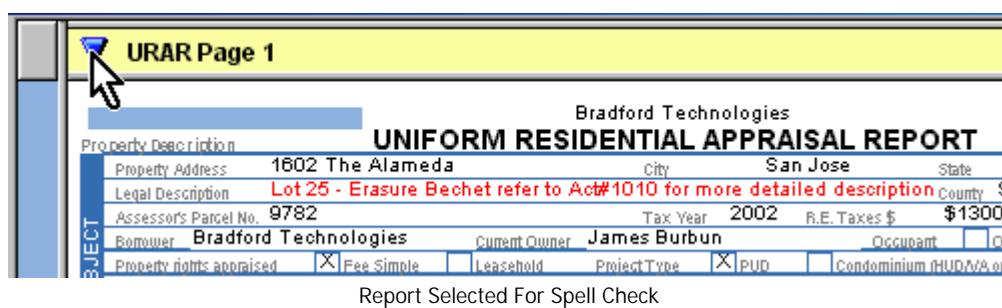
### 3.9.1.3 Report

#### Spell Check: Report

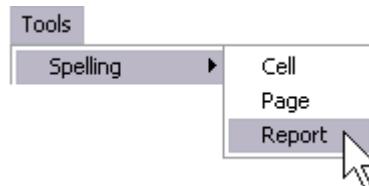
Use this command to perform a complete Spell Check of all the text in a report.

#### Spell Checking Report Text

- ▶ To Spell Check all the text in a report:
  - ▶ Open a report that you would like to Spell Check in your [Workspace](#).

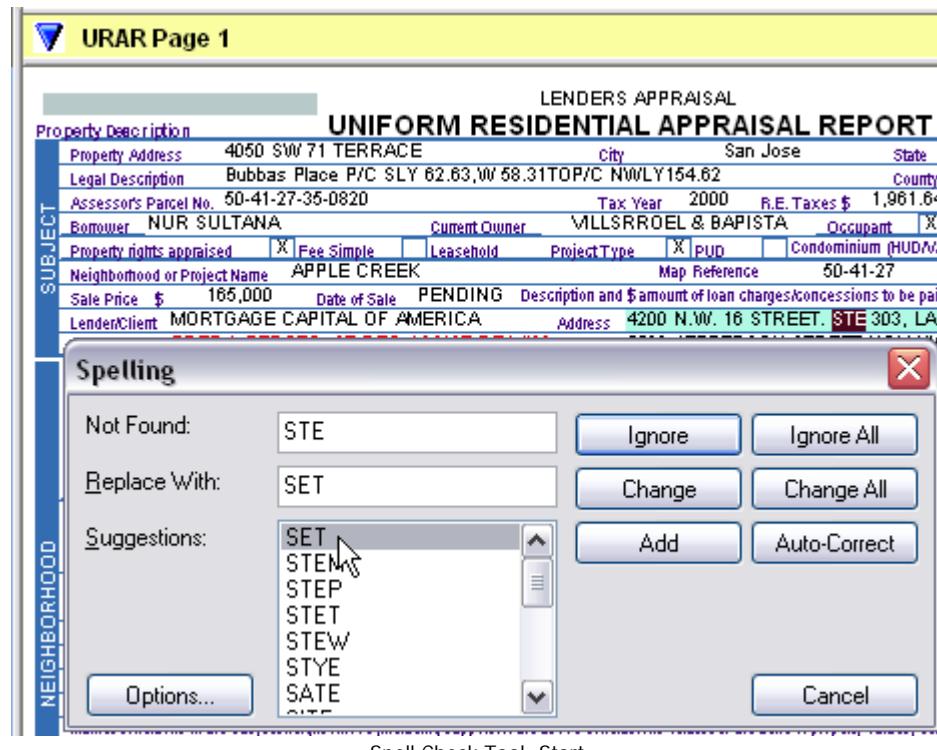


1. Click on the [Tools menu](#) title in the [menu bar](#).
2. Move the mouse cursor down to [Spelling](#).
3. Click on Report.



- ▶ The Spell Check Tool will be displayed.

1. Spell Check will display a list of suggestions: click on the correct word.
2. Click on the [Change] button to correct the misspelling.
3. Repeat the process until all spelling errors have been corrected.



Spell Check Tool: Start

► The Spell Check Complete dialog will be displayed:

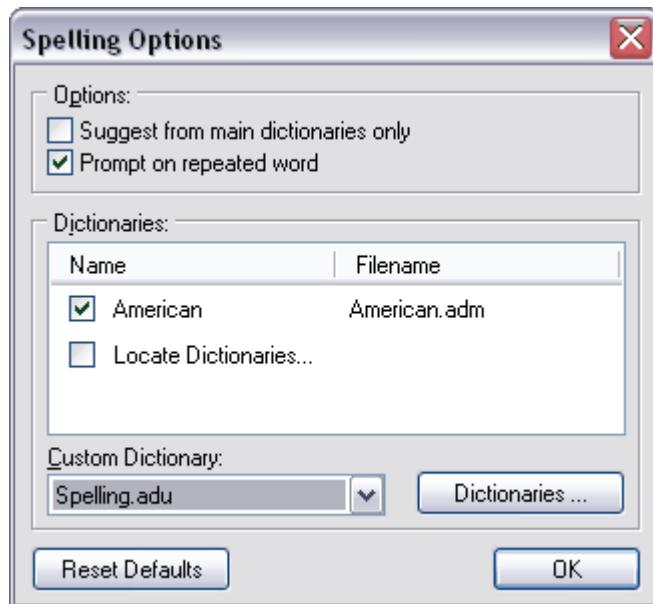
- Immediately, if there are no misspelled words in your selection.
- After you make a change, if there are no more spelling errors.

► Click on the [OK] button to close Spell Check and return to your report



Spell Check Complete Dialog

► Clicking on the [Options] button will display the [Spell Check Option Window](#).



Spell Check Configuration Sheet: Options Tab Page

- Customizing Spell Check Options: Add selections from the Ignore, Suggestions and General panels.

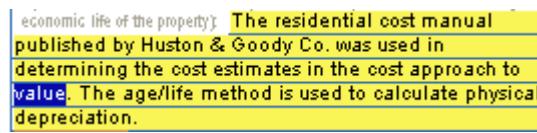
### 3.9.2 Thesaurus

#### The Thesaurus Tool

Use this command to capture cell text, search for synonyms and insert them in place of the original words.

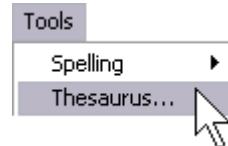
#### Using the Thesaurus

- To look up the synonym for text in a report:

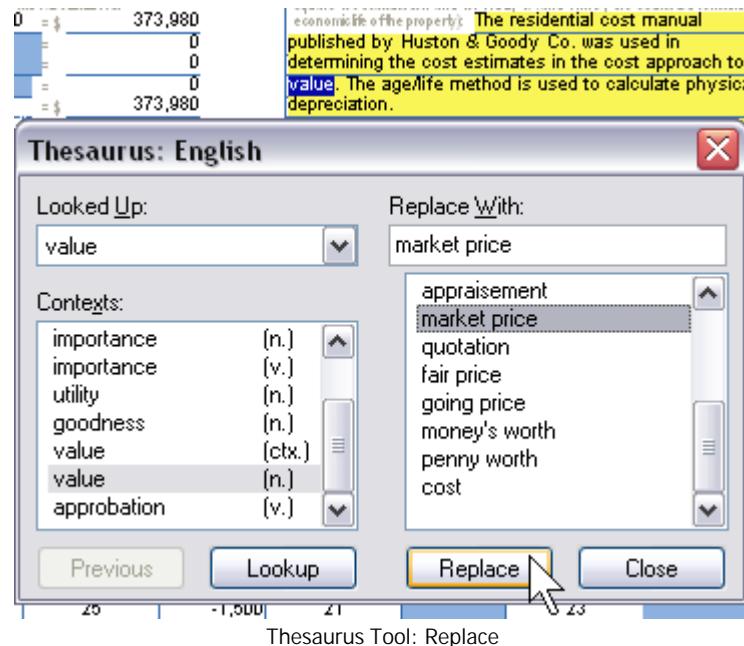


Word Selected For Thesaurus Check

- Select the word or phrase that you would like to replace by blocking it.



1. Click on the [Tools menu](#) title in the [menu bar](#).
2. Click on "Thesaurus...".



- When the Thesaurus Lookup property sheet is displayed, select a Context and a synonym to Replace With:

1. Click on the synonym in the results pane (right-hand side).
2. Click on the [Replace] button to modify your text.

estimates in the cost approach to  
market price. The age/life method is  
used to calculate physical depreciation.

Selection Replaced With Synonym

- ▶ Your original entry will be replaced with the selected synonym.

### 3.9.3 Signatures

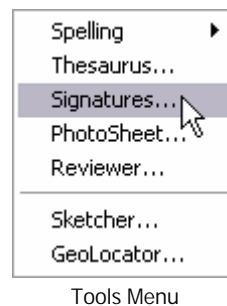
#### The Signatures Tool

Use this command to setup, select, affix and remove Appraiser and Supervisor Digital Signatures.

#### Using the Signatures Tool

To Affix or Remove a Signature:

- On the Menu Bar, Click on Tools>Signatures....



- To Affix your signature to the report, select Appraiser or Supervisor and then Click on Affix



Signature Affix and Remove Window

- To Remove your signature from the Report, select Appraiser or Supervisor and Click on Remove



Signature Affix and Remove Window

► To Setup your Signature or Clear an old and setup a New Signature

1. Select Appraiser or Supervisor and Click on Setup.



Signature Affix and Remove Window

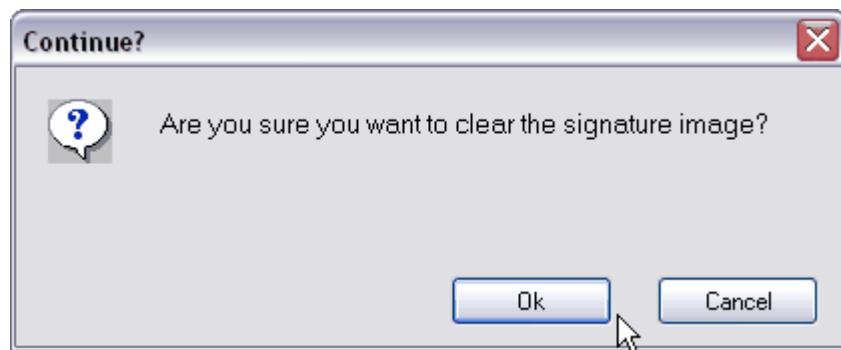
2. Click on Clear.

- Proceed to step 6 if do not want to Clear Signature and you only want to setup your signature Position.



Signature Setup Window

3. You will receive a Continue message asking if you are sure, Click on OK.



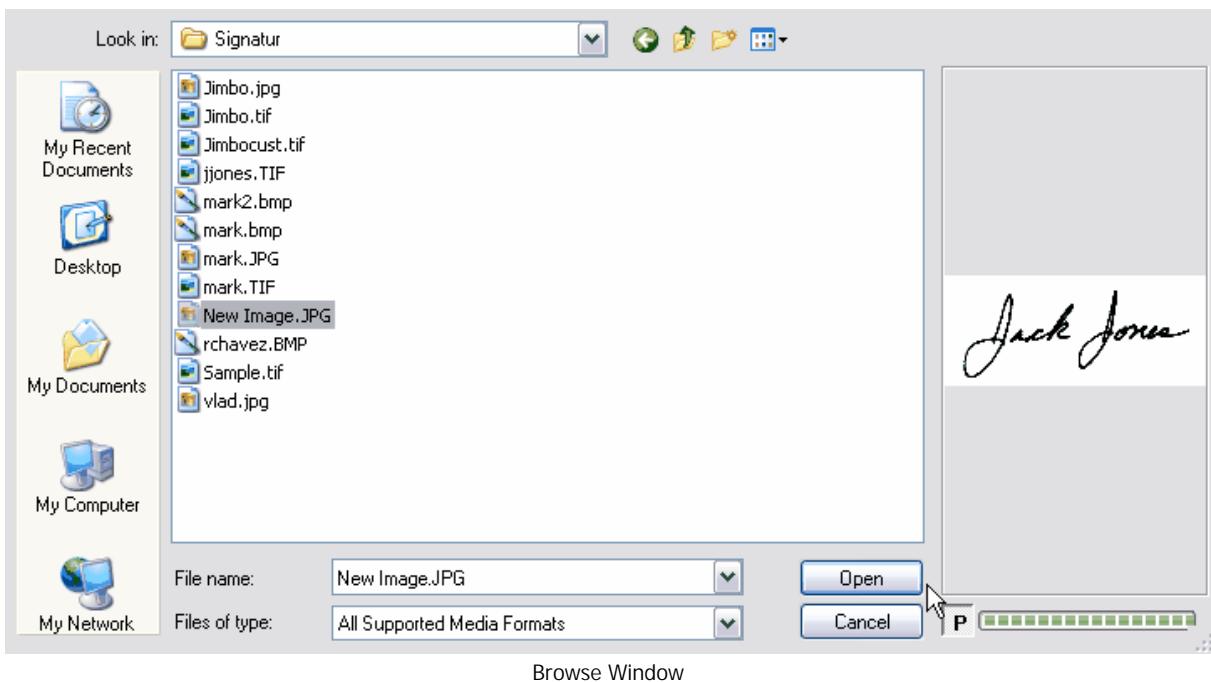
Continue Message

4. Click on Load, which will open a Browse Window.



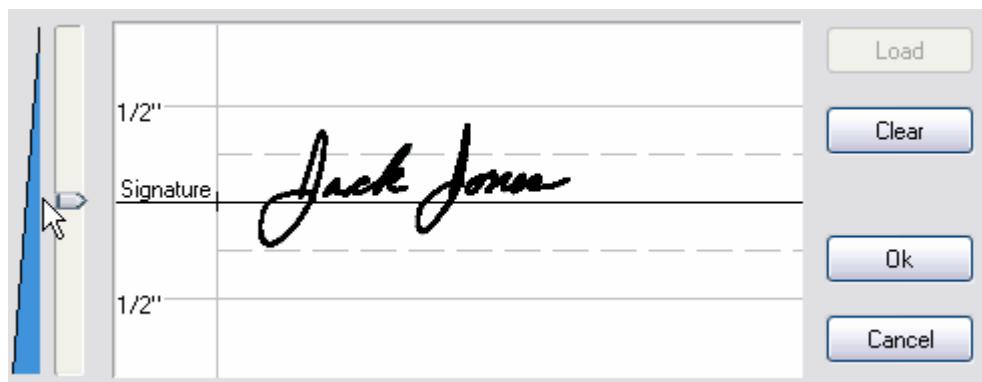
Signature Setup Window

5. Browse to the Folder containing your new signature, select it and Click on Open



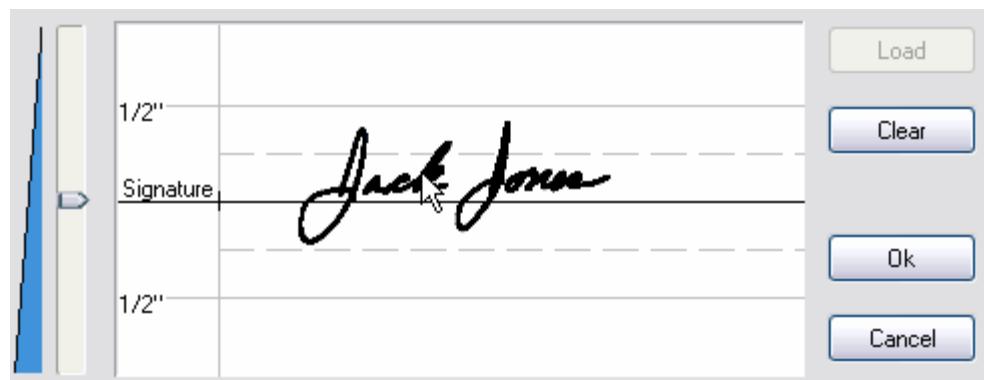
Browse Window

6. Adjust the size of your signature by holding down the Left Mouse button and sliding the arrow



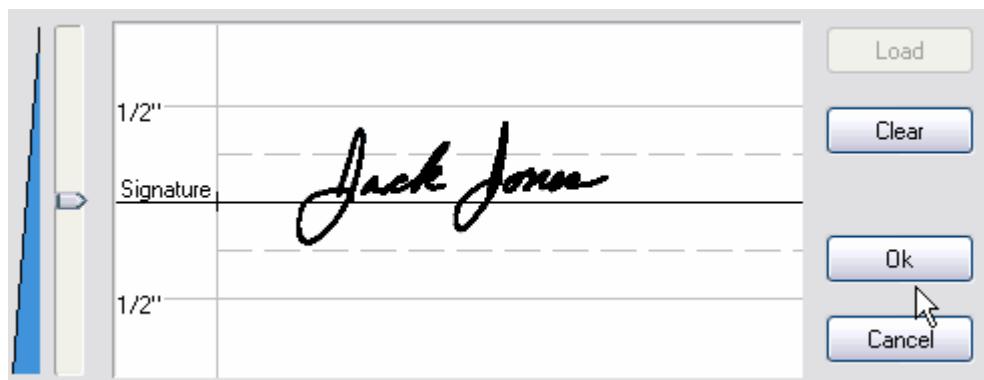
Signature Setup Window

7. Adjust the Position of your signature by holding down the Left Mouse button on the signature and moving



Signature Setup Window

8. Once positioned properly, Click on OK



Signature Setup Window

- You are now finished setting up your signature.

### 3.9.4 PhotoSheet

#### The PhotoSheet Tool

Use this command to launch the PhotoSheet application in order to build albums from digital photos that will be inserted into forms to complete your reports.

#### Using PhotoSheet

- ▶ To launch the PhotoSheet Tool:



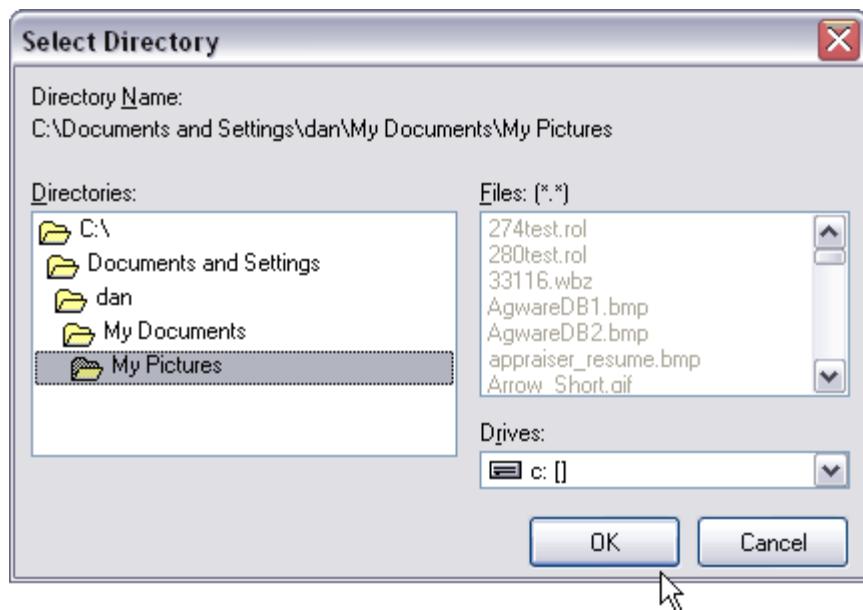
1. Click on the [Tools menu](#) title in the [menu bar](#).
2. Click on the "PhotoSheet..." selection.

- ▶ When the PhotoSheet application is displayed, click on the [Load] button.



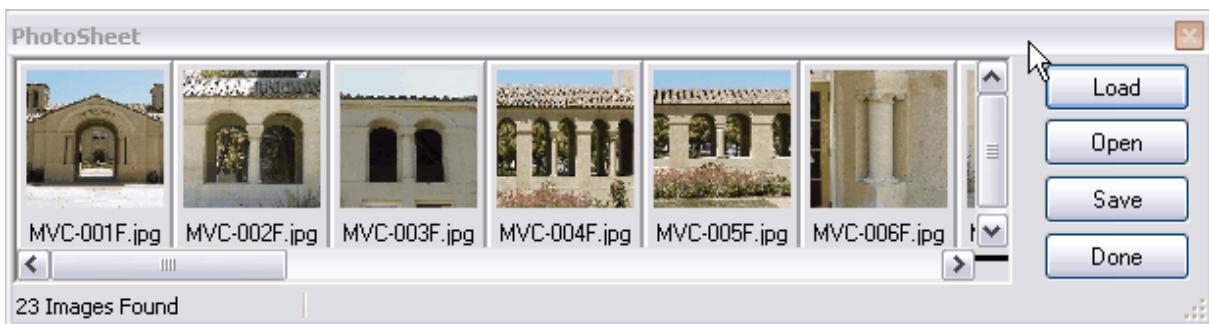
The PhotoSheet Tool

- ▶ When the Select Directory dialog is displayed, Browse to the Drive i.e. C:\ - Hard Drive, A:\ - Floppy Drive, F:\ - Camera\Memory Card\Reader and Folder where your digital images are and click on the [OK] button to Load the Images into Photosheet.



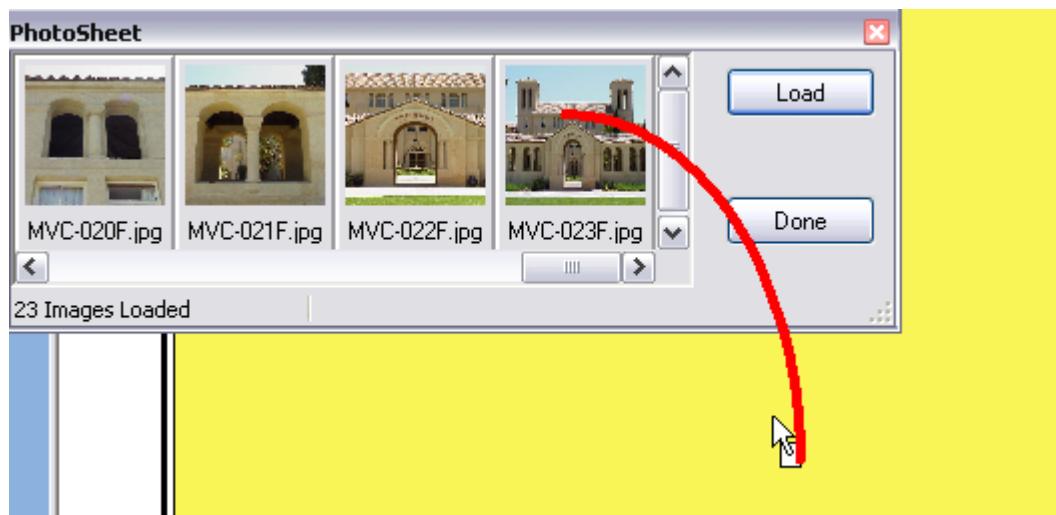
Select Directory Dialog

- The images will load into PhotoSheet.



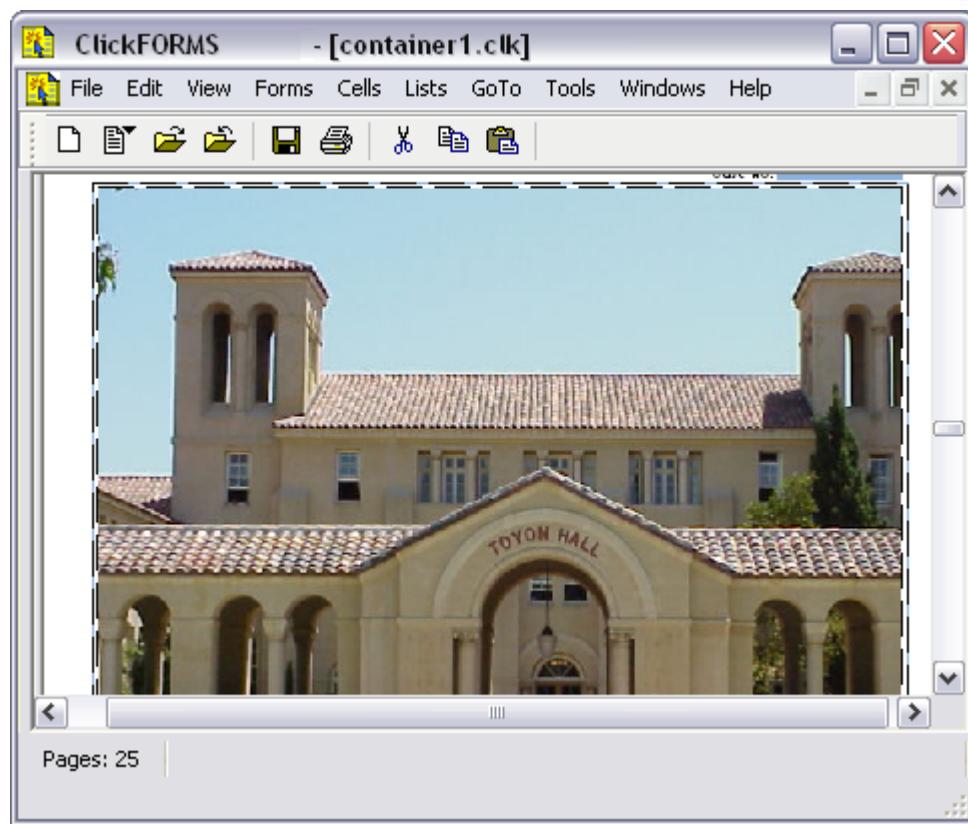
Digital Photos Loaded Into PhotoSheet

- Click on an image and drag it into your photo addendum cell.



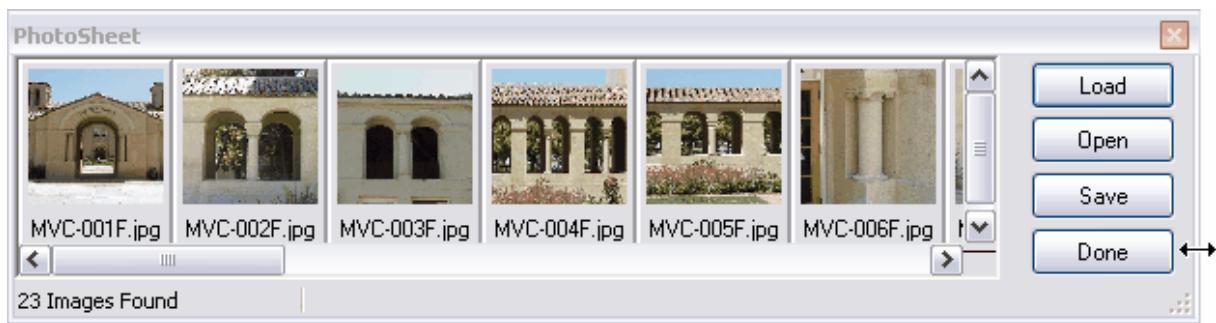
Drag And Drop of Digital Image From PhotoSheet Into Addendum Cell

- ▶ The digital photo will be loaded from PhotoSheet into your selected photo addendum cell.



Digital Photo Inserted Into Photo Addendum Cell

- ▶ Click on the [Done] button.



PhotoSheet: Done

### 3.9.5 Reviewer

#### The Reviewer Tool

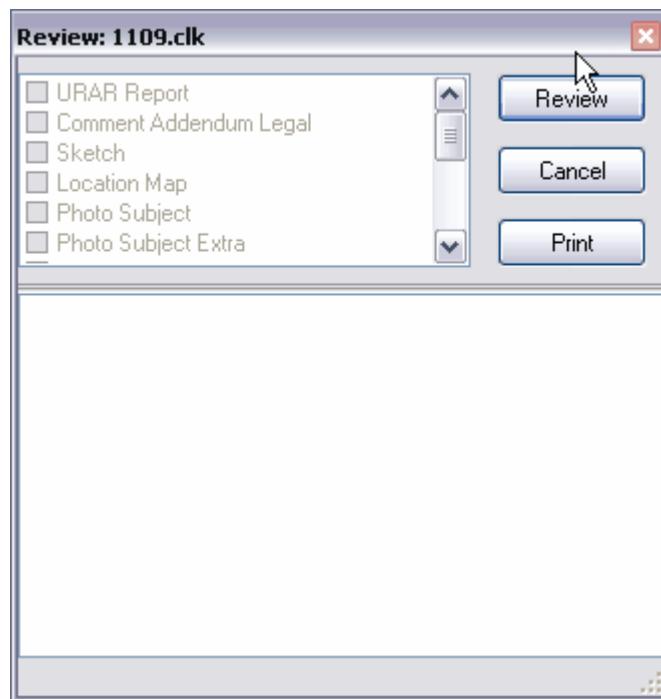
Use this command to launch the Reviewer application and use it to validate your report.

#### Using Reviewer

- To launch the Reviewer:

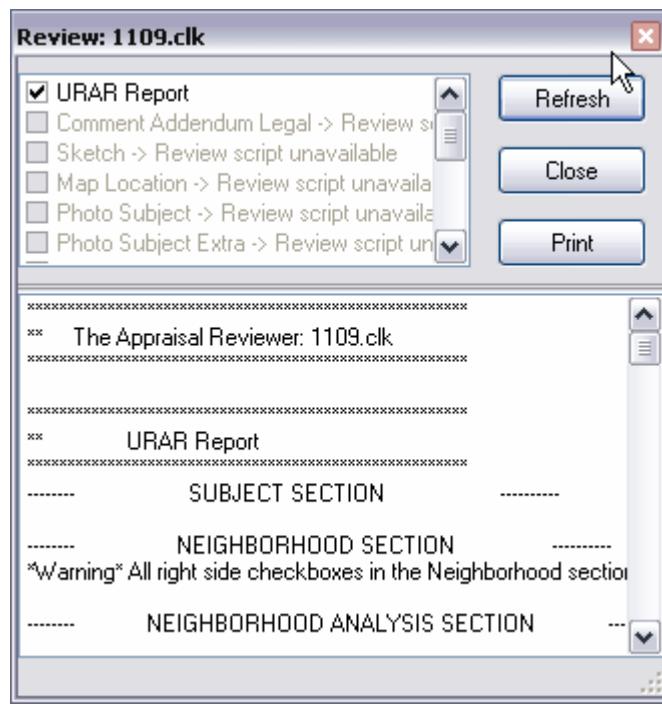


1. Click on the [Tools menu](#) title in the [menu bar](#).
2. Click on the "Reviewer..." selection.



The Reviewer Tool

- When the Reviewer Tool is displayed, click on the [Review] button to proceed.



Reviewer Tool: Refresh

- The Reviewer will validate the data and logic in your form cells.

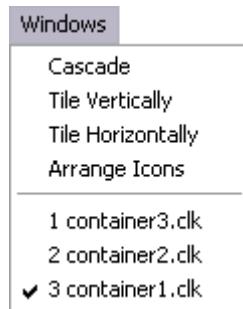
## 3.10 The Windows Menu

### Windows Menu Functions

This menu displays a list of commands for managing and aligning the [container](#) windows in your [Workspace](#).

### Accessing the Windows Menu

- ▶ To access the Windows Menu:



- ▶ Point your cursor to the Windows menu title in the [menu bar](#) and click once.

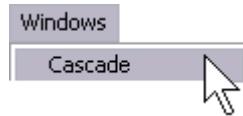
### 3.10.1 Cascade

#### The Cascade Command

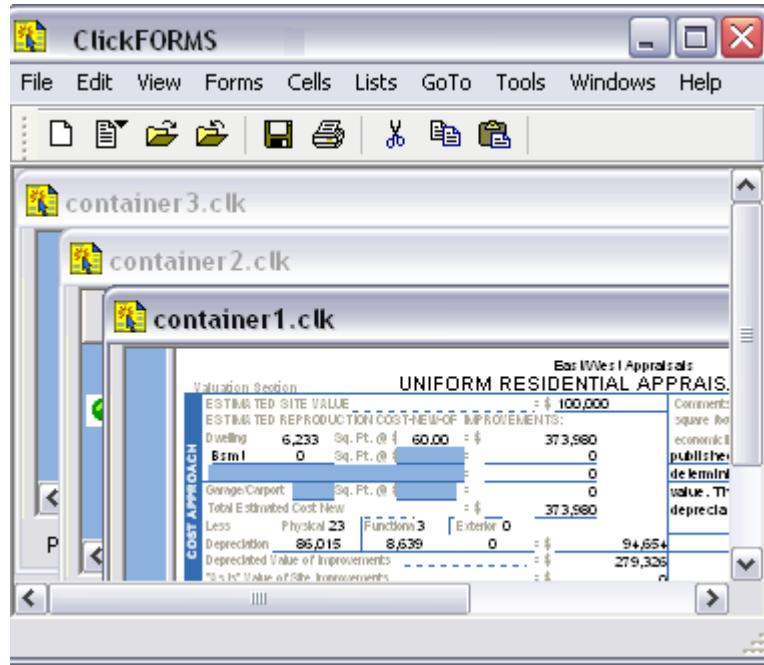
Use this command to arrange the [Workspace](#) windows in cascading display format.

#### Activating the Cascade Windows Command

- To use the Cascade Windows Command:



1. Click on the [Windows](#) title from the [menu bar](#).
2. Click on Cascade.



Cascading Container Window Display

- The displayed report [containers](#) will be arranged in your [Workspace](#) as cascading windows.

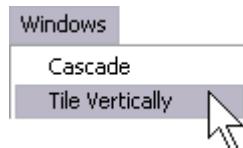
### 3.10.2 Tile Vertically

#### The Tile Vertically Command

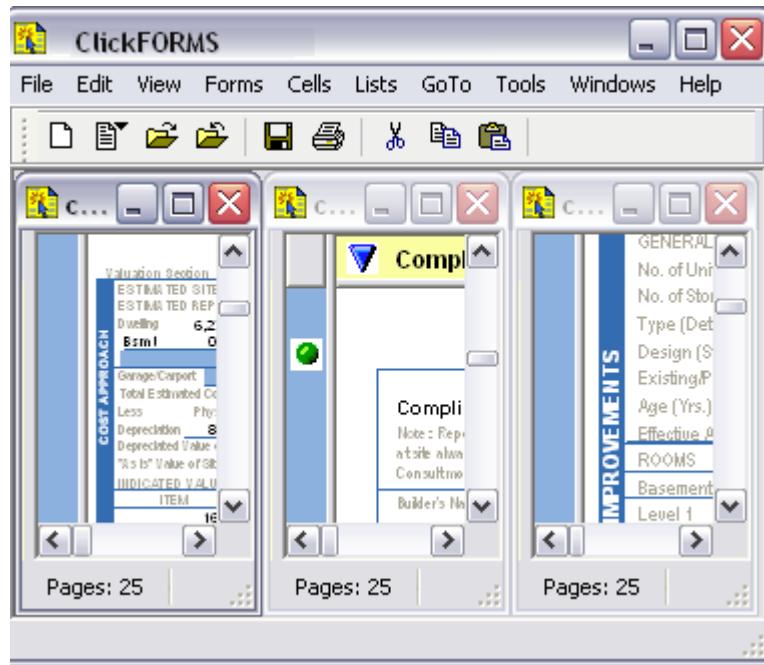
Use this command to arrange the [Workspace](#) windows in vertically tiled display format.

#### Activating the Tile Windows Vertically Command

- ▶ To use the Tile Windows Vertically Command:



1. Click on the [Windows](#) title in the [menu bar](#).
2. Click on Tile Vertically.



Vertically Tiled Container Window Display

- ▶ The displayed report [container](#) windows will be vertically tiled in your [Workspace](#).

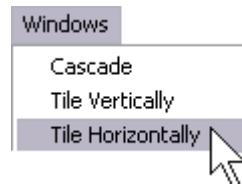
### 3.10.3 Tile Horizontally

#### The Tile Horizontally Command

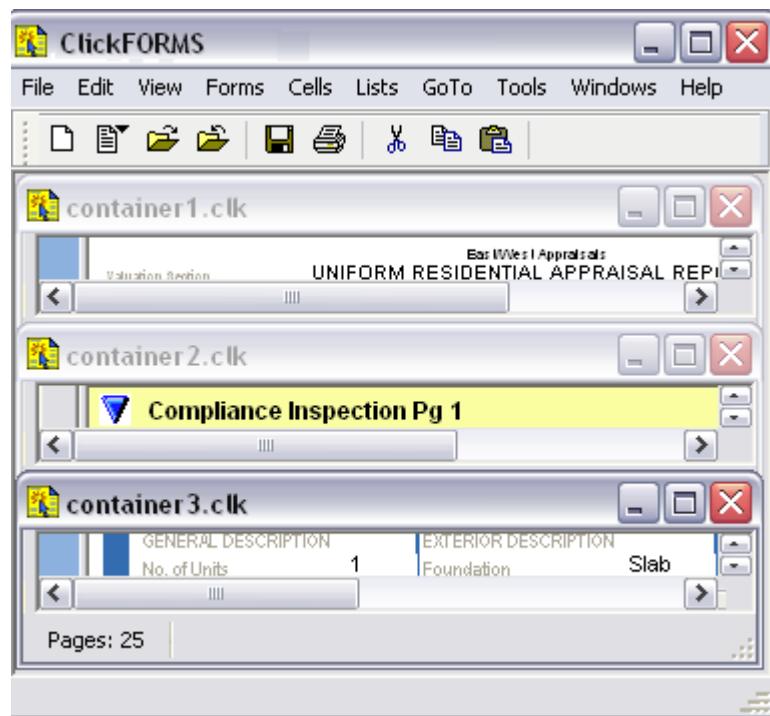
Use this command to arrange the [Workspace](#) windows in horizontally tiled display format.

#### Activating the Tile Windows Horizontally Command

- To use the Tile Windows Horizontally Command:



1. Click on the [Windows](#) title in the [menu bar](#).
2. Click on Tile Horizontally.



Horizontally Tiled Container Window Display

- The report [container](#) windows will be displayed in your [Workspace](#) as horizontally tiled windows.

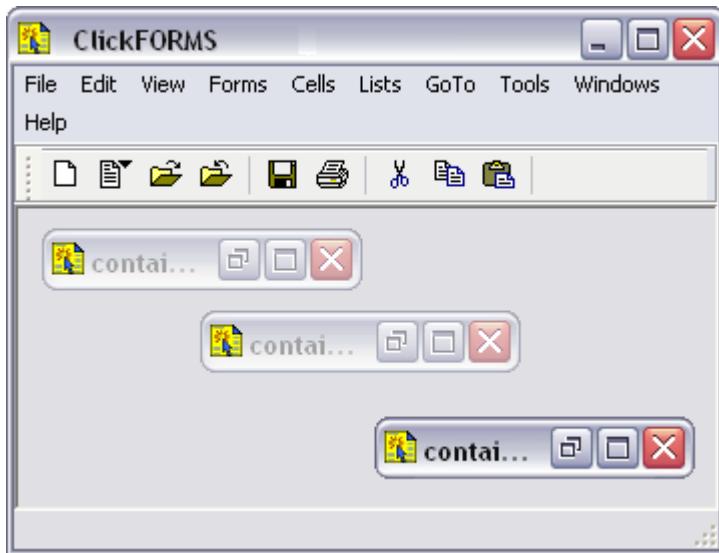
### 3.10.4 Arrange Icons

#### The Arrange Icons Command

Use this command to organize the minimized [containers](#) (also known as icons) that are open in your [Workspace](#).

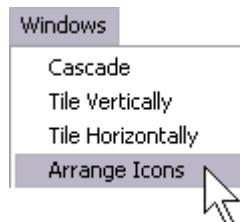
#### Activating the Arrange Icons Command

- To use the Arrange Icons Command:

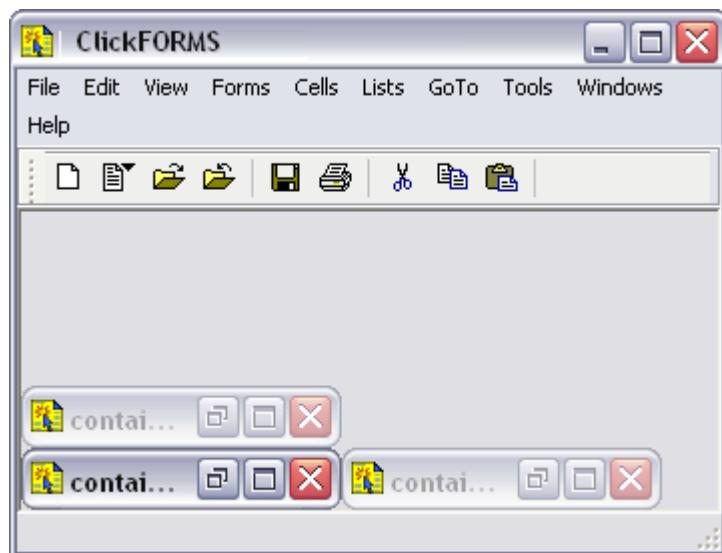


Randomly Placed Container Window Icons

- If there are minimized report [containers](#) (icons) in a random order within your [Workspace](#)...



1. Click on the [Windows](#) title in the [menu bar](#).
2. Click on the Arrange Icons selection.



Auto Arranged Container Window Icons

- ▶ The icons will be stacked neatly at the bottom of your [Workspace](#).

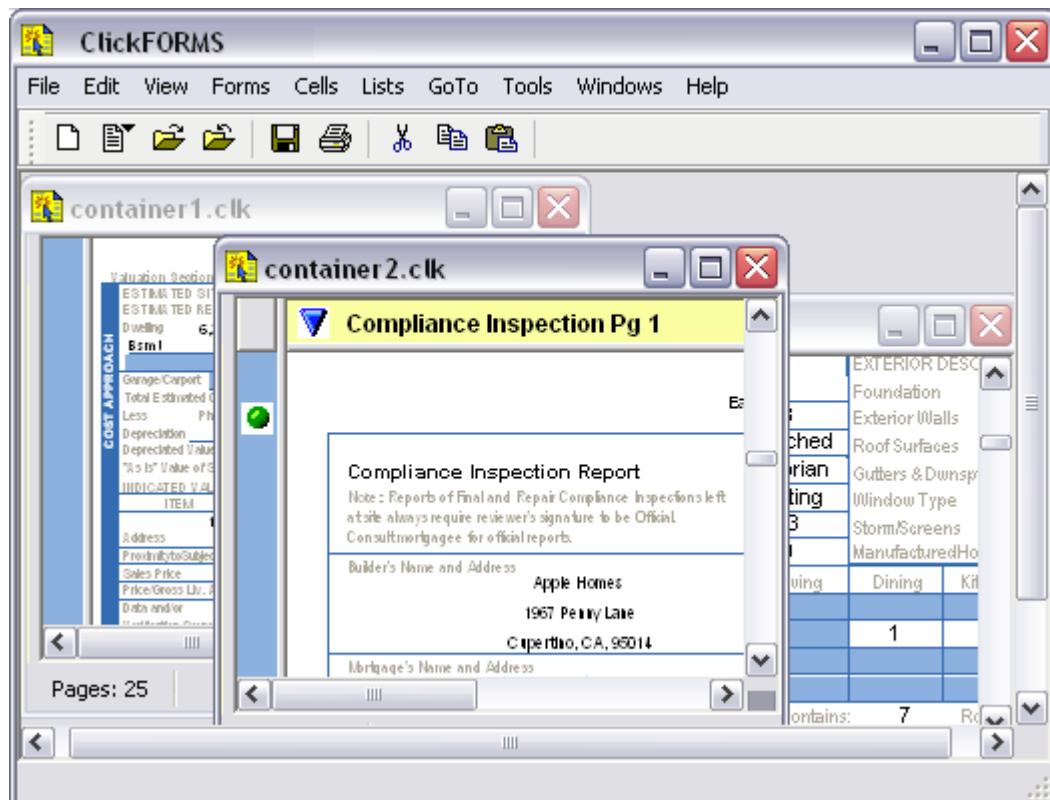
### 3.10.5 Select File by Name

#### The Workspace File Selector Command

Use this command to bring a report container to the front of your Workspace.

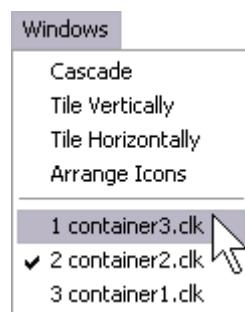
#### Selecting a File by Name

- You have several report windows open in your Workspace.

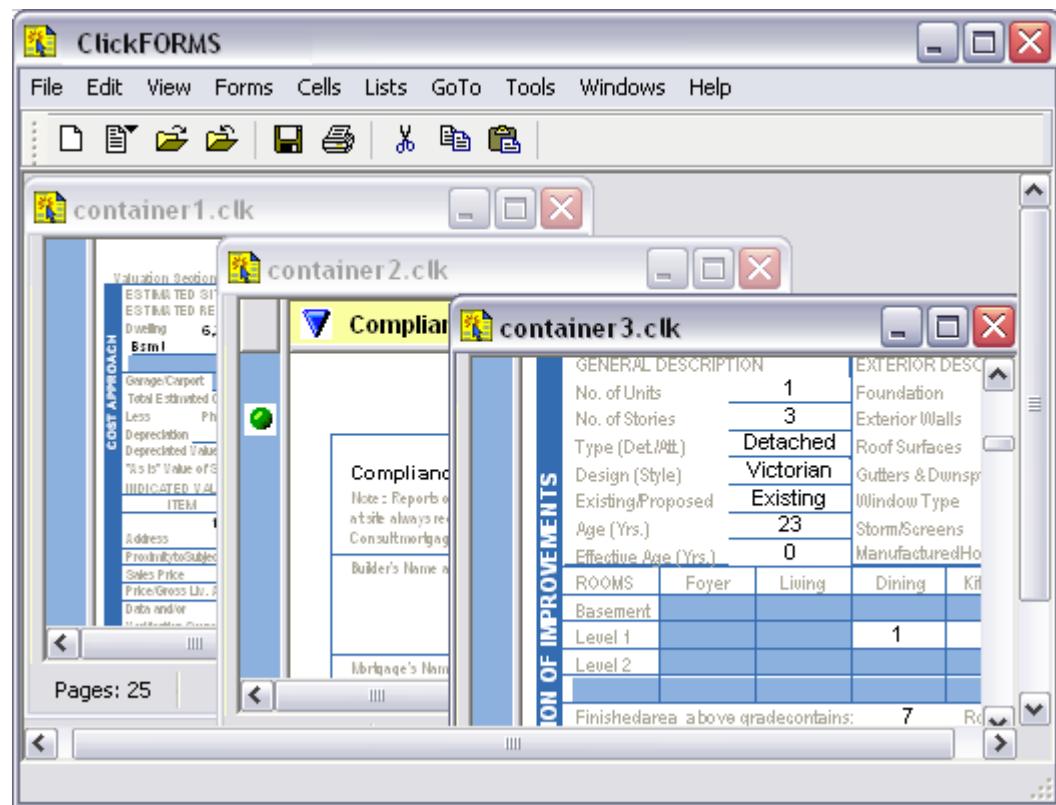


Container2.clk is The Active Window

- To select a different report by name and bring it into view:



1. Click on the Windows title in the menu bar.
2. Click on the file name of the report window to activate.



Container3.clk is The Active Window

- The selected report will be displayed as the active window in your [Workspace](#).

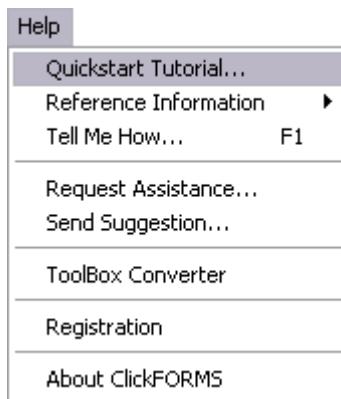
## 3.11 The Help Menu

### Help Menu Functions

This Menu displays a list of commands for accessing Information on Tutorials, User Guide, Tell Me How, Request Assistance and Sending Suggestions to Bradford Technologies Inc..

### Accessing the Help Menu

- ▶ To access the Help Menu:



- ▶ Point your cursor to the Help menu title in the menu bar and click once.

### 3.11.1 QuickStart Tutorial

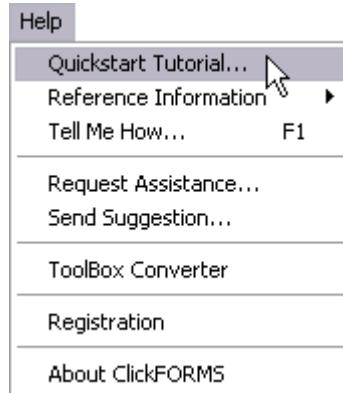
#### The QuickStart Launcher

Use this command to launch the QuickStart Tutorial PDF from your Local Drive. This Tutorial will get you up and running with ClickForms much faster than trying to learn these basic steps on your own.

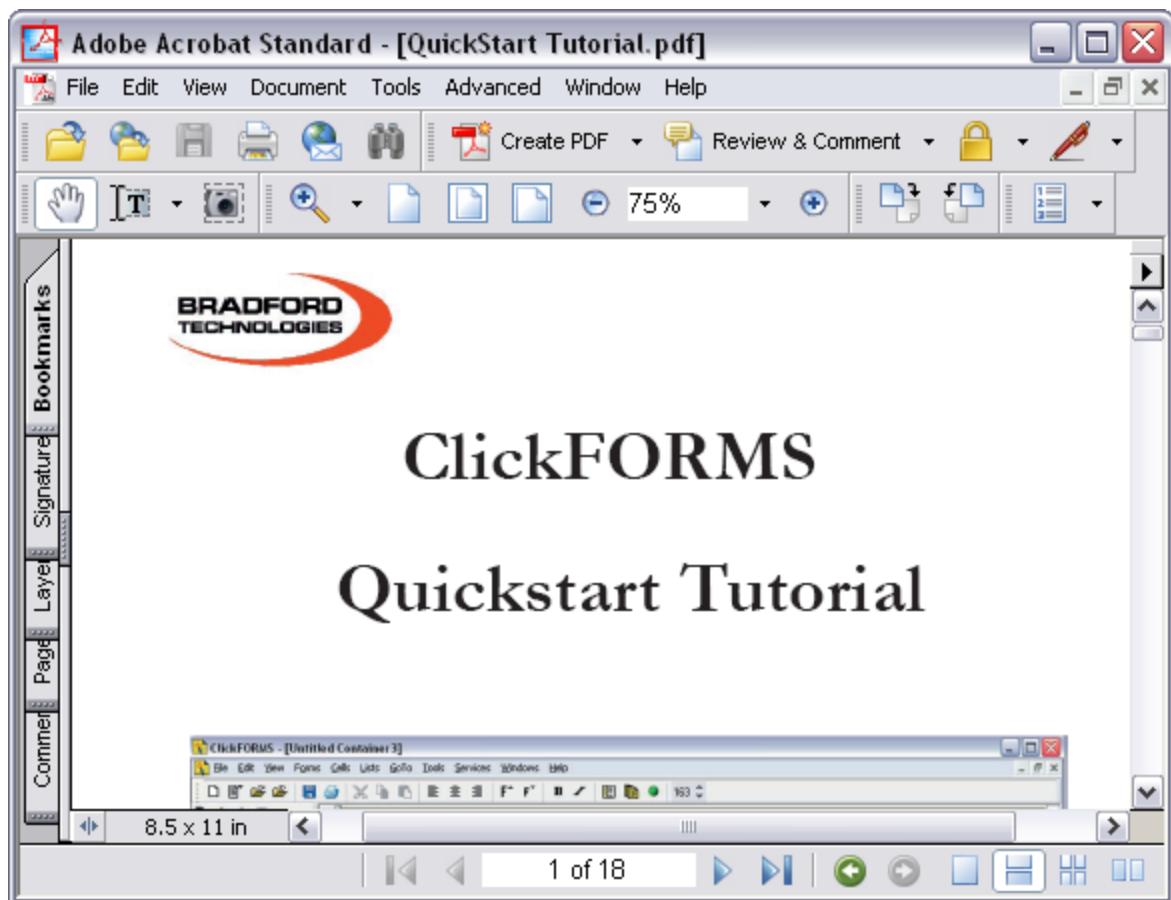
#### Accessing the The QuickStart Tutorial

► To access the QuickStart Tutorial:

1. Click on the Help menu title in the menu bar.
  2. Move your mouse cursor down to QuickStart Tutorial and Click on it.
- Note: You must have Adobe Acrobat Reader installed on your PC to view this PDF File.



► The QuickStart Tutorial will be launched into full-screen view in an Adobe Acrobat Window.



### 3.11.2 Information

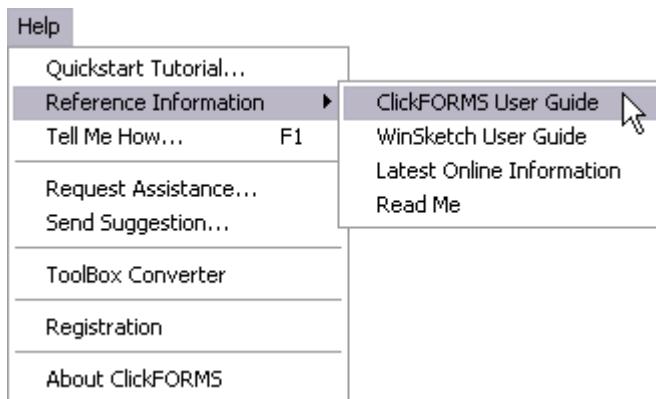
#### Reference Menu Commands

There are Four help items that are accessible from the Reference Information menu.

- [WinSketch User Guide](#)
- [ClickForms User Guide](#)
- [Online Help](#)
- [Read Me](#)

#### Accessing the Reference Menu

► To access the Reference menu:



1. Click on the [Help](#) menu title in the [menu bar](#).
2. Move your mouse cursor down to the Information item.

### 3.11.2.1 WinSketch User Guide

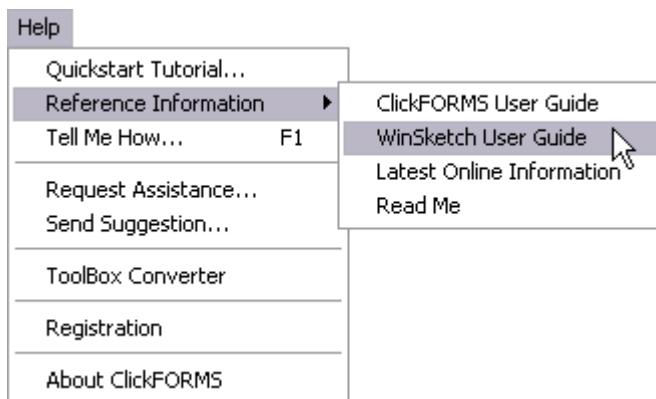
#### [The WinSketch User Guide Launcher](#)

Use this command to launch the WinSketch User Guide PDF from your local drive.

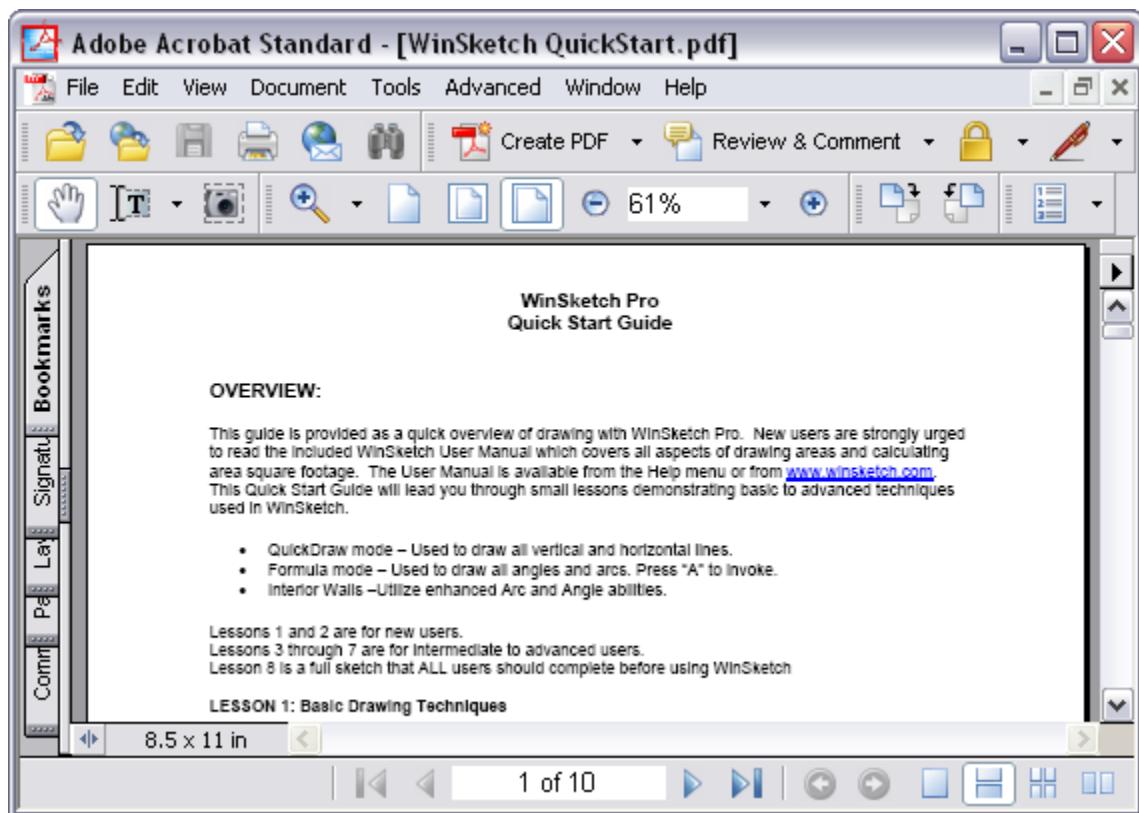
#### [Accessing the The WinSketch User Guide PDF](#)

► To access the WinSketch User Guide PDF:

1. Click on the [Help](#) menu title in the [menu bar](#).
  2. Move your mouse cursor down to Reference Information and Hover until the Cascaded Window Opens.
  3. Click once on WinSketch User Guide.
- Note: You must have Adobe Acrobat Reader installed on your PC to view this PDF File.



► The WinSketch User Guide will be launched into full-screen view in Adobe Acrobat.



### 3.11.2.2 ClickForms User Guide

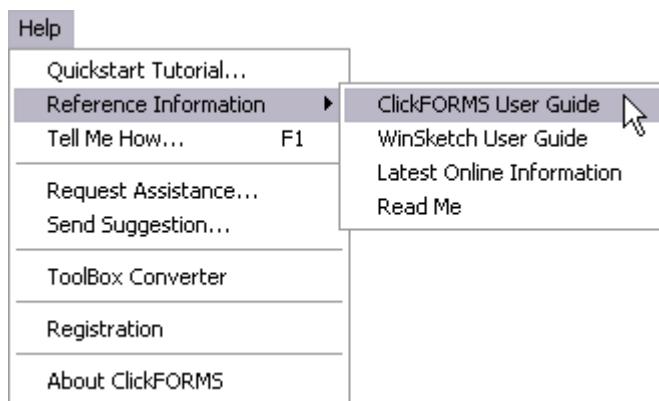
#### The User Guide Launcher

Use this command to launch the [User Guide](#) eBook from your local drive.

#### Accessing the The User Guide eBook

► To access the ClickForms User Guide eBook:

1. Click on the [Help](#) menu title in the [menu bar](#).
2. Move your mouse cursor down to Reference Information and Hover until the Cascaded Window Opens.
3. Click once on ClickForms User Guide.



► The [User Guide](#) will be launched into full-screen view.



The User Guide eBook

### 3.11.2.3 Online Help

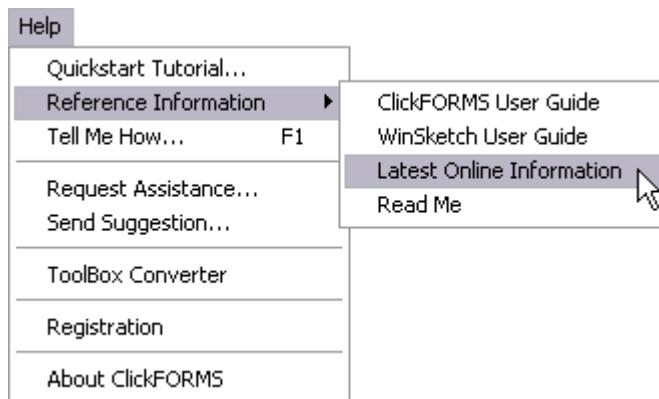
#### The Online Help Launcher

Use this command to get the latest information in the Support area on the World Wide Web.

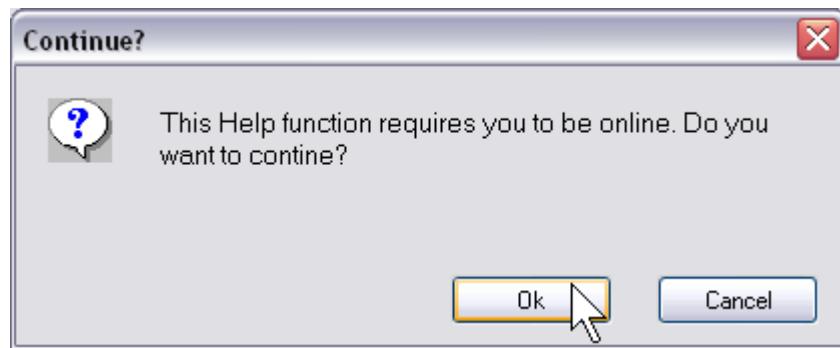
#### Accessing Online Help

► To access Online Help:

1. Click on the Help menu title in the menu bar.
2. Move your mouse cursor down to Reference Information and Hover your Mouse until the Cascaded Window Opens.
3. Click once on the Latest Online Information item.



4. Ensure that you are logged on with your Internet Service Provider.
5. When the "Continue?" dialog is displayed, click on the [Ok] button to proceed.



Internet Connection Required Dialog

- The Support page on [www.bradfordsoftware.com](http://www.bradfordsoftware.com) web site will launch in your default web browser.

 **BRADFORD TECHNOLOGIES**

**Store**   **Switch**   **ClickFORMS**   **Solutions**   **Support**   **Customers**

Tell Me How...   Support Plans   Training   Downloads   Request Assistance

**Quick Links**

**ClickFORMS Help Files**

- [Tell Me How series](#)
- [Online User Guide](#)
- [A Quick Tutorial \(PDF\)](#)

**Click here for available Forms in ClickFORMS**

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**The Appraiser's ToolBox**

- [FAQs and "How To's"](#)
- [User Guide \(PDF\)](#)
- [ToolBox Tutorial \(PDF\)](#)
- [ToolBox Features \(PDF\)](#)

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**ClickNOTES**

**New!** [ClickFORMS v2.1.4 - New Update - 3/31/03](#)

Find out why ClickFORMS is the leading hassle-free appraisal software. Make your report processing experience enjoyable.

► [Click here to download ClickFORMS v2.1.4.](#)  
► [Click here to see "What's New" about ClickFORMS v2.1.4.](#)

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 **Weekly Tech Tip**

 ► [Include your Resume' with Reports, we tell you how](#)  
► [View Previous Weekly Tech Tips](#)

Support Page on Bradford Technologies Inc. Web Site

### 3.11.2.4 Read Me

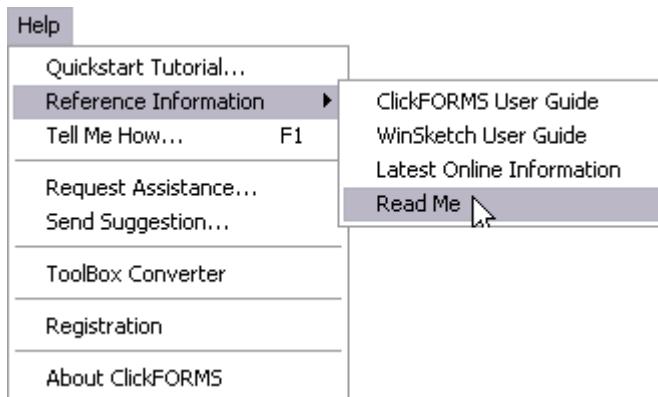
#### The Read Me Launcher

Use this command to launch the Read Me Window which Contains important information you should review. The Read Me will have all the changes listed that are included in this version and all previous versions along with any special instructions that may be required of you to perform a Task to insure this update works properly.

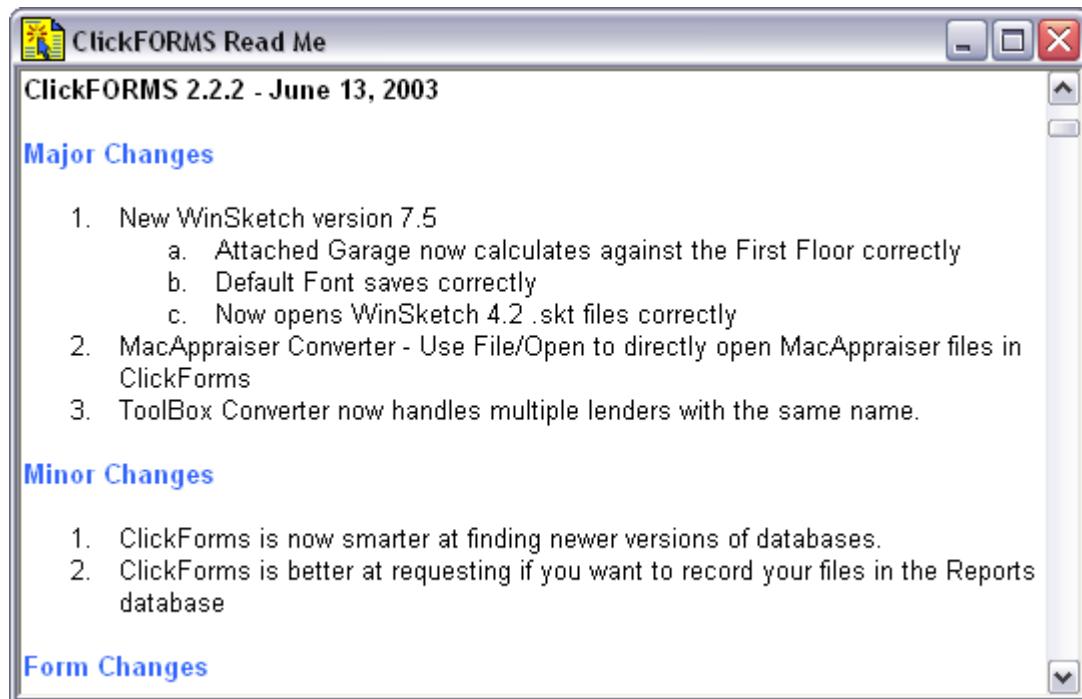
#### Accessing the Read Me Window

► To access the Read Me Window:

1. Click on the Help menu title in the menu bar.
2. Move your mouse cursor down to Reference information and Hover until the Cascaded Window Opens.
3. Click once on Read Me.



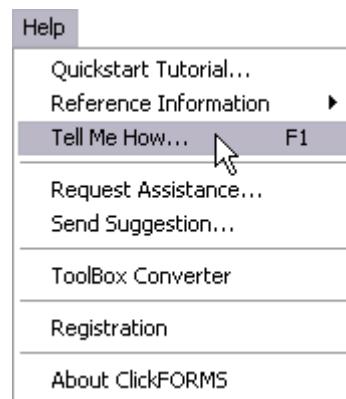
► The Read Me Window will be Opened into view.



### 3.11.3 Tell Me How

#### Accessing the Tell Me How Series eBook

► To access the Tell Me How Series eBook:



1. Click on the Help menu title in the menu bar.
2. Click once on "Tell Me How...".
3. The Tell Me How Series eBook will launch into Full-Screen view.



The ClickFORMS Tell Me How Series eBook

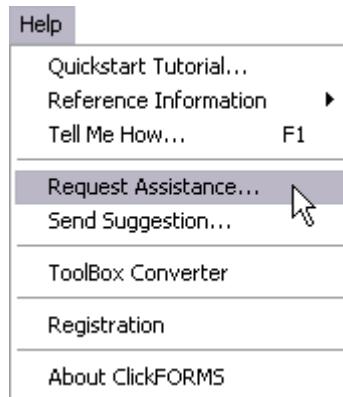
» [Click here to view the Tell Me How Series eBook](#)

### 3.11.4 Request Support

#### Requesting Support

► To request support:

1. Ensure that you are logged on with your [Internet Service Provider](#).
2. Click on the [Help](#) menu title in the [menu bar](#).
3. Click once on Request Assistance.....

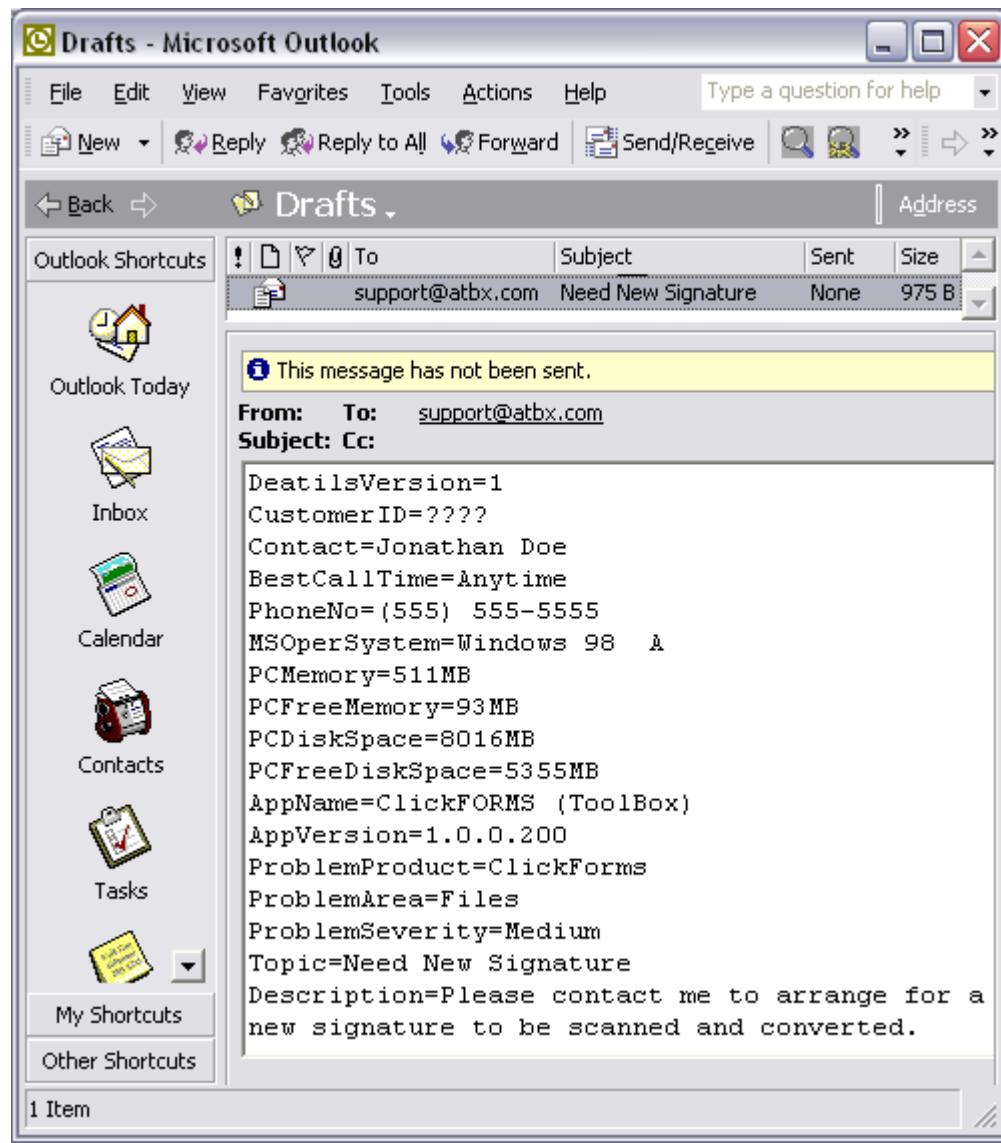


4. Fill out the Request Assistance email dialog and click on the [Send] button.

A screenshot of a 'Request Assistance' dialog box. The dialog has two main sections: 'Contact' and 'Issue'. In the 'Contact' section, there are fields for 'Name' (Dan McQuilliams), 'Best Time to Call' (a dropdown menu), and 'Phone No.' (1-408-360-8520). In the 'Issue' section, there are dropdown menus for 'Product' (ClickForms), 'Area' (Client Database), and 'Severity' (Med - Does not function). Below these sections are 'Send' and 'Cancel' buttons. A 'Subject' field contains 'Client Database'. A large text area at the bottom is labeled: 'Text you would enter to describe your problem and any error messages in detail that you may have received. The more information you can provide, the better in resolving your problem in a timely manner without needing to email back and forth requesting additional information.'

Request Assistance email dialog

- If you are not connected to the Internet, ensure that your message is sent the next time you log on by checking your Drafts Folder for emails that have not been sent. Click on the Email in the Draft Queue and then Click on Send.

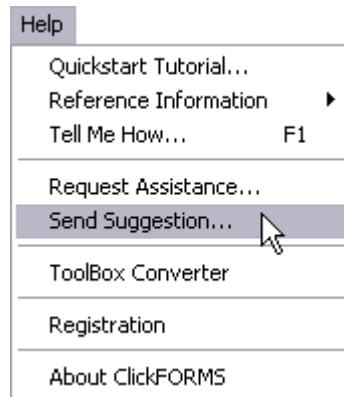


### 3.11.5 Send Suggestion

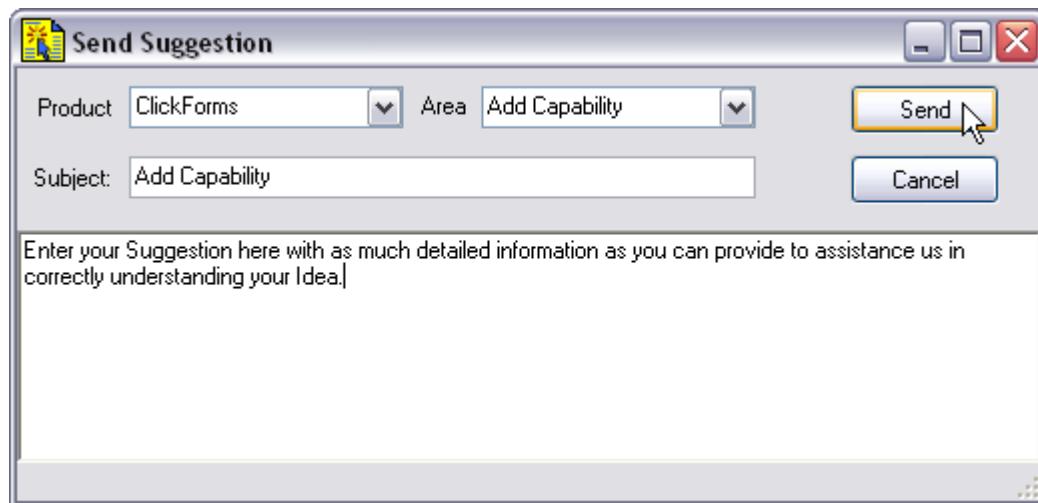
#### Sending a Suggestion

► To send a suggestion to Bradford Technologies Inc.:

1. Ensure that you are logged on with your [Internet Service Provider](#).
2. Click on the [Help](#) menu title in the [menu bar](#).
3. Click on Send Suggestion.



4. Fill out the email message and click on the [Send] button to email it to Bradford Technologies Inc. using your default email application.

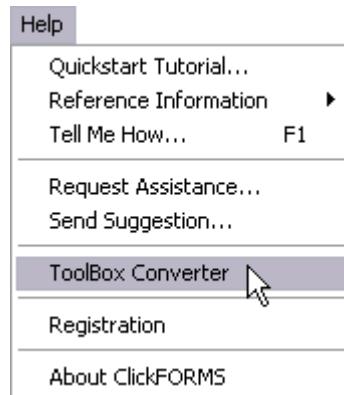


### 3.11.6 ToolBox Converter

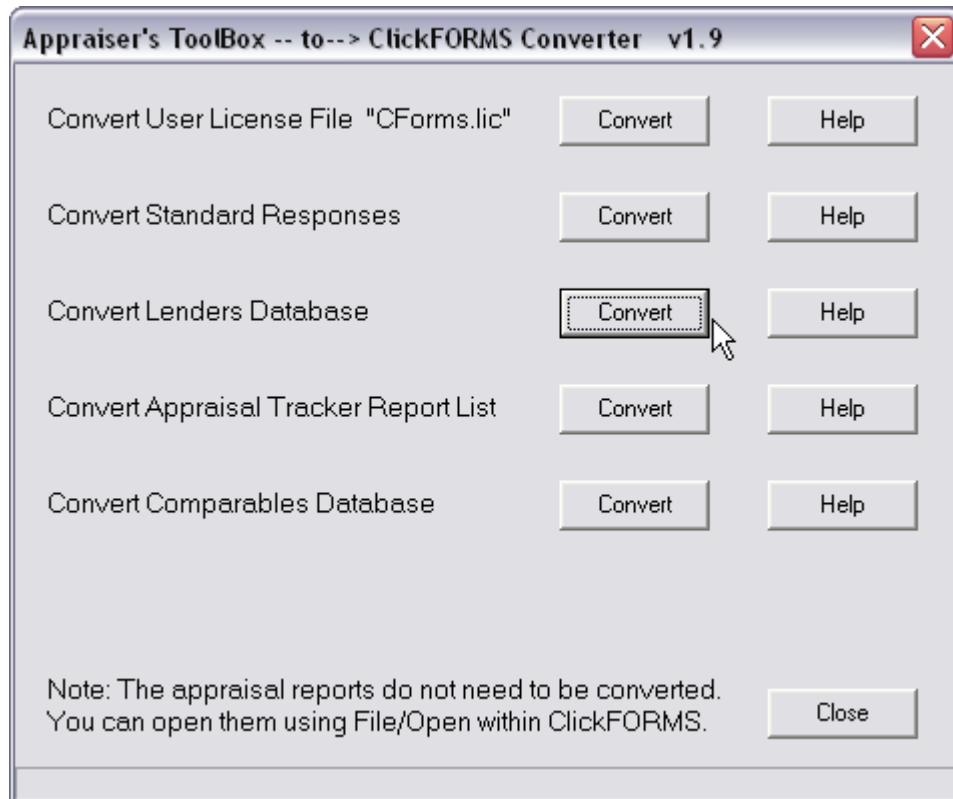
#### Launching the ToolBox Converter

► To Convert your ToolBox Files:

1. Click on the Help menu title in the menu bar.
2. Click on ToolBox Converter.



► The ToolBox Converter will Launch. You can now Convert your ToolBox files by Clicking on the Convert Button next to each of the described ToolBox Files you may wish to Convert. This will not touch any of your ToolBox files. It will merely Copy and Convert them for use in ClickForms. You will still be able to Launch and use all your files in ToolBox if you ever wish to do so.



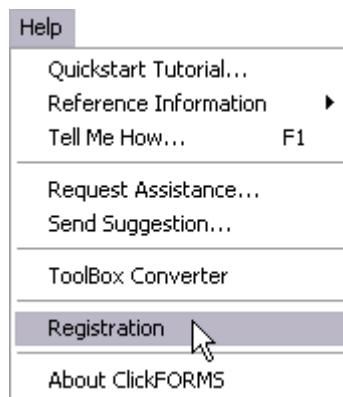
- ▶ Additional Information on Databases (Lists) [The Lists Menu](#)

### 3.11.7 Registration

#### Sending Your Registration

► To send your registration for to Bradford Technologies Inc.:

1. Ensure that you are logged on with your [Internet Service Provider](#).
2. Click on the [Help](#) menu title in the [menu bar](#).
3. Click on Registration.



4. Complete the Registration Information on each Tab page and click on the [Register] or [Ok] button.

A screenshot of a 'Software Registration' dialog box. It has three tabs at the top: 'User Info' (selected), 'Registration', and 'Appraisal Info'. The 'User Info' tab contains fields for contact information:

- Name: Dan McQuilliams
- Company: Bradford Technologies Inc.
- Address: 7174 Santa Teresa Blvd. Suite A-2
- City: San Jose
- State: Ca
- Zip: 95139
- Country: (dropdown menu)
- Phone: 1-408-360-8520
- Fax: 1-408-360-8529
- Cell Ph.: (empty)
- Pager: (empty)
- E-Mail: dan@atbx.com

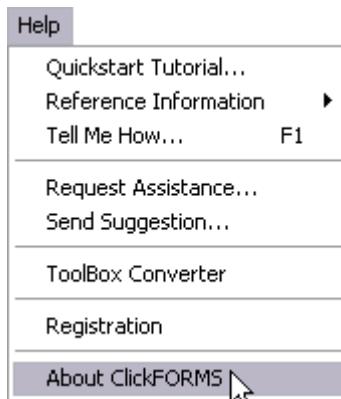
At the bottom of the dialog are three buttons: 'Register' (disabled), 'Ok', and 'Close'.

Registration Dialog: License Owner Tab Page

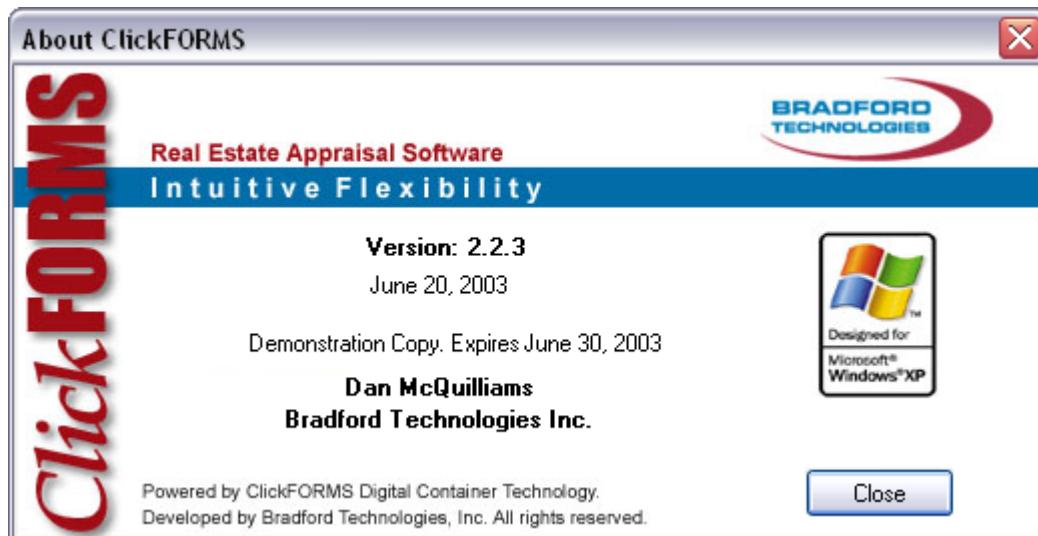
### 3.11.8 About This Software

#### Viewing the Version Release Number

► To determine what version of the software you are using:



1. Click on the Help menu title in the menu bar.
2. Click on About ClickFORMS.
3. The software About ClickForms splash screen will be displayed. The Version Number will displayed approximately Mid-Window along with other information.
4. Click on the [Close] button to hide this screen from view.



The About Splash Screen



User Guide

# Part

A horizontal green line extends from the left side of the word "Part" towards a large, bold, black-outlined green square containing the white text "IV".



## 4 Contact

Bradford Technologies Inc. Contact Information



[Bradford Technologies, Inc.](#)  
7174 Santa Teresa Boulevard  
Suite A-2 San Jose, CA 95139  
Voice: (408) 360-8520  
Fax: (408) 360-8529

Hours of Operation:  
Weekdays, Monday to Friday  
8:00 AM to 5:00 PM PST/PDT  
On The World Wide Web:  
<http://www.bradfordsoftware.com>

[Telephone and E-Mail](#)

[Location Map](#)

## 4.1 Telephone and E-Mail

### Primary Email Addresses and Telephone Numbers

 Please use the information below to contact:

[Bradford Technologies, Inc.](http://Bradford Technologies, Inc.)

Sales (800) 622-8727  
[sales@bradfordsoftware.com](mailto:sales@bradfordsoftware.com)

Registration (408) 360-8520

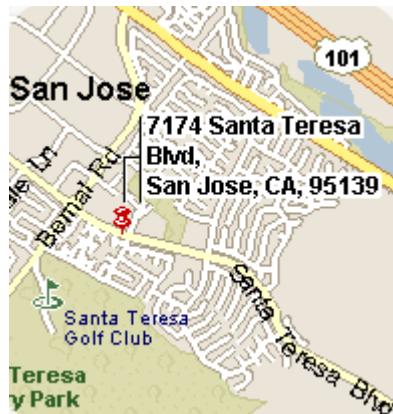
Comments  
[comments@bradfordsoftware.com](mailto:comments@bradfordsoftware.com)

[Suggestions](#)  
[suggestions@bradfordsoftware.com](mailto:suggestions@bradfordsoftware.com)

## 4.2 View Map

### Office Location Map

 A location map of the Bradford Technologies Inc. head office can be viewed below:



Bradford Technologies Inc. Location Map

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