



# Manual

## Create a cover sheet template for Real estate valuation SC

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Microsoft Partner

© Sprengnetter Austria GmbH | 10.-Oktober-Straße 12 | A-9560 Feldkirchen  
☎ 04276 5704 ✉ [office@sprengnetter.at](mailto:office@sprengnetter.at)

# Contents of this document

As **Administrator** you can freely design the **first page of the printout** (report) of the software **Real estate valuation**. To do this, you create a one-time **cover page template** in which you can define the headers and footers.

**Use the following steps to define your personal cover page:**

1. Create your cover page template as a Word file (\* .doc; \* .docx).
2. Save them in the software **Real estate valuation**.
3. Use your template when printing.

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## Overview: Which steps have to be done?

- Start **Word** with a **new document**.
- Create a **cover sheet** according to your needs. You can use **macros (placeholders)** to **integrate automatically** changed values into your cover sheet. See chapter [Macro list](#).
- Define your headers and footers (**Recommendation: Different first page**).

**Note:** If you define a cover sheet on the first page, you have to insert a page break at the end of the page (place the cursor at the end of the page and press **Ctrl / Enter** or select **Page break** in the menu **Insert**). If you do not insert a page break, the contents are inserted on the cover sheet of the report.

If you only define your header and footer on the first page (without cover sheet), you do not have to insert the page break.

- Save this file in **.doc or .docx format**. Then close the file.
- In the **maintenance**, create a new cover page with the desired name using the **context menu (right mouse click / New)** under the section **Cover sheet, header and footer**.
- Use the **Use file** link to connect the file you have created to your cover sheet.

## This you should know about the file size of your cover page.

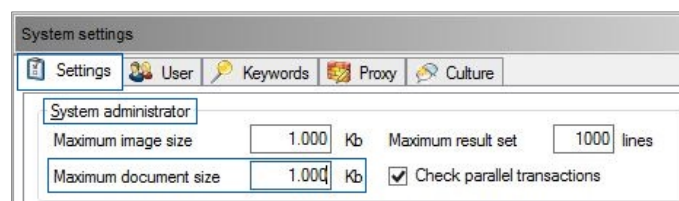
The **file size** of your cover page should never exceed **1,000 KB (1 MB)**. Otherwise the database will be affected and this could lead to performance problems.

In the software solution, the **system administrator** can set a **maximum document size** for cover sheets. This prevents overly large cover pages from being saved. You can find this setting in the toolbar



**Productivity / button**

After you have logged in as a **system administrator**, you will find the entry **System settings**. You can define the **maximum document size** in the tab **Settings / System Administrator group** in the input field **Maximum document size**.



**Note:** If the document size is to be checked, a value must be entered in the input field **Maximum document size**.

## Step 1: Creation of a sample cover sheet with headers and footers

1. Start **Word** with a **new document**.

2. Create a **cover sheet** according to your needs.
3. You can use **macros (placeholders)** to **integrate automatically** changed values into your cover sheet.
4. You can also place a **cover page picture**.
5. In this file you also define your **headers and footers**.

## Use of macros

With the **help of macros**, you can automatically transfer the **content of data fields**. You **save** yourself the need to **adjust the text**, as **any changes to the input fields** in the printout are automatically adopted.

## Macro list

The following macros are available:

Valuation	
Client type	[K01]
Client number	[K02]
Client name	[K03]
Client address	[K04]
Client zip code	[K05]
Client city	[K06]
Client nation	[K07]
Cadastral number	[L01]
Designation	[L02]
Real estate assignment	[L03]
Real estate district court	[L04]
Real estate - land register	[L05]
Real estate address	[L06]
Real estate zip code	[L07]
Real estate city	[L08]
Real estate nation	[L09]
Identifier	[L10]
Valuation date	[B01]
Revaluation date	[B02]
Valuation price basis	[B03]
Valuation reference number	[B04]
State of the confirmation	[B05]
User name	[U01]

User role	[U02]
User institute	[U03]
User address1	[U04]
User address2	[U05]
User phone	[U06]
User e-mail	[U07]
Windows user account	[U08]
DRC value	[S01]
Total of land values	[S02]
Total of building values	[S03]
Income value	[S04]
Total of encumbrances	[S05]
Total of rights in rem	[S06]
Market value of the valuation	[S07]
Internal lending value	[S08]
Lending value (Solvency)	[S09]
Gross yield of the valuation	[S10]
Comparison value of valuation	[S11]
Internal lending value %	[S12]
Market value after completion	[S13]
Date after completion	[S14]
Market value per sq.m. usable floor area	[BM01]
Purchase price per sq.m. usable floor area	[BM02]
Purchase price difference to market value	[BM03]
Purchase price difference to market value in %	[BM04]
Gross income per sq.m. per month	[BM05]
Vacancy rate	[BM07]
Gross initial yield	[BM08]
Net initial yield	[BM09]
Gross income multiplier	[BM10]
Net income multiplier	[BM11]
Vacancy rate (area)	[BM12]
Due date active history	[H01]
Market value active history	[H02]
<b>Registered user</b>	
User name	[AU01]
User role	[AU02]
User institute	[AU03]

User address1	[AU04]
User address2	[AU05]
User phone	[AU06]
User e-mail	[AU07]
Windows user account	[AU08]
<b>General</b>	
Date	[SYS01]
Time	[SYS02]
Domain user	[SYS03]
<b>Findings/General</b>	
Owner	[B06]
Land plots	[B07]
Building sections	[B08]
Gross income	[B09]
Encumbrances	[B10]
Rights in rem	[B11]
Comparison objects	[B12]
Workflowhistory	[B13]
Environment Analysis	[UA20]

## Definition of a cover page image

You can place **any picture** on the cover page. You can designate an image as a cover page image in any of your reports. This will then be automatically inserted on the cover page of your report.

### Step 1

Insert the macro **[DECKBLATTBILD]** on the cover sheet. This macro will be replaced by the picture that you defined at the level Valuations in the tab **Images** with this macro. Note that the picture always has to be scaled to **25 percent of the height of the page**. So it is important that you provide enough space after the macro.

### Step 2

Define the picture for the cover sheet at the level **Clients** in the tab **Images**. To define an image for the cover page, the image name must contain the term "**[DECKBLATTBILD]**".

**Note: Only one image** can be defined as a cover page image. If several are defined, the assignment is random. If you use the cover sheet for a valuation in which **no image** is available or **no cover sheet image** is defined, the macro is not printed out.

## Definition of the header and footer

To print the report with the desired header and footer, it is necessary to define them once.

**Note:** The defined header and footer is output on every page of the generated document.

**Note:** If you define a cover sheet on the first page, you have to insert a page break at the end of the page (place the cursor at the end of the page and press **Ctrl / Enter** or select **Page break** in the menu **Insert**). If you do not insert a page break, the contents are inserted on the cover sheet of the report.

If you only define your header and footer on the first page (without cover sheet), you do not have to insert the page break.

### Recommendation: First page different

If you want to output the first page (cover page) without the headers and footers you have defined, we recommend that you set the first page in the cover page as follows:

Open the menu option **Page layout / Page settings / Layout / Header and footers** in your document and activate the option **Different first page**. In this case the header and footer are not printed on the first page but from page 2 on.

## Settings in Word 2016

Make the modifications of the settings in Word.

- Before activation of the menu option **Insert / Header and footer** insert a **page break** at the end of the cover sheet (Hotkey **Ctrl / Enter** or by menu option **Insert / Page break**).
- Activate the menu option **Design**.
- Now you can define your headers.
- To integrate a **picture** in the header, position the mouse pointer on the desired location and activate the menu option **Insert / Images**. Select the graphic file and press the button **Insert**.

**Recommendation: Graphics and logos** should always be created in table form.

- If necessary, you can also create a footer.

**Note:** The page numbering **page 1 of X** is supported. Therefore, use the option **Page number**.

- **Note:** If you define a cover sheet on the first page, you have to insert a page break at the end of the page (place the cursor at the end of the page and press **Ctrl / Enter** or select **Page break** in the menu **Insert**). If you do not insert a page break, the contents are inserted on the cover sheet of the report.

If you only define your header and footer on the first page (without cover sheet), you do not have to insert the page break.

## Step 2: Saving

Save the file in **.doc** or **.docx** format. Then close the file.

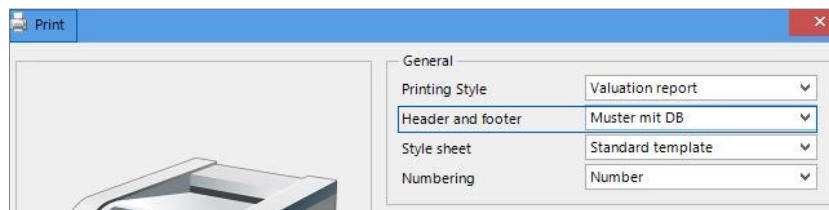
## Step 3: Adding a cover sheet

To use a cover sheet in the report, load it in the maintenance once.

- In the module **Maintenance** select **Cover sheets, header and footer**. Open the context menu (**right mouse button**) and activate the option **New**.
- In the dialog capture **the name of the cover sheet** in the input field **Name**.
- Select if the cover sheet is used for a **valuation report** or **statistics**.
- Click on the link **Use file**. Open the previously added **.doc** file.
- The message "**File loaded successfully!**" shows that the cover sheet is saved and can be used.
- Now the cover sheet is available for selection in the print dialog under **Header and footer**.

## Step 4: Selecting the cover sheet when printing

The newly created cover page template is now **automatically** available for **printing**. You can see this in the print dialog under **Header and footer**:



## Adaptation of existing cover pages including headers and footers

- In the list of cover sheets select the desired cover sheet. Open the context menu (**right mouse button**) and activate the function **Save as file**. You can save the cover into **any directory** with **any filename**.
- Make your desired adaptations in the saved file and close the file.
- In the maintenance edit the cover sheet and open the **context menu** (right mouse click) and activate the option **Open**.
- Click on the link **Use file**. Open the **previously changed file**.
- The message "**File loaded successfully!**" shows that the cover sheet inclusive header and footer is stored in the database and be used from this point of time.

## Solutions to frequently asked questions (FAQ's)



- **Graphics** on the cover page **are supported**.
- **Lines** and **frame colors** on the cover sheet are **supported**.
- The **page numbering** page 1 of X is **supported**.
- **Macros don't work**  
Enter the macro in the cover sheet template (file) **from scratch (do not overwrite)**. Please note the **capitalization**.
- **The user name should be displayed on the cover page instead of admin.**  
**Maintenance / section User management /** press the **Search** button, then select the desired user and enter the desired name in the tab **Login / User field**.
- **The macro says <undefined>**.  
No value is defined in the respective data field in the program.
- **When printing, the table of contents is output on the cover page.**  
You have to insert a page break at the end of the page (place the cursor at the end of the cover sheet and press **Ctrl / Enter** or select **Page break** in the menu **Insert**). If you only define your header and footer on the first page (without cover sheet), you do not have to insert the page break.