



# First steps

## Real estate valuation SC

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## Handling

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On the **left side of the window** (navigation) you find **all elements** you need for a valuation.

To start a valuation you have to capture a client at the level **Clients** (Button  in the tab **Start**). If you have already captured clients, you can open one (item **Search** in the navigation).

In the next step you can capture as many properties (Level **Properties** in the navigation) for the current client as you need. Therefore press the button  in the tab **Start** or the button  at the level **Properties**. Only if you have entered a valuation, you can access the other levels (**Land plots, DRC value, Income method, Comparison properties, Rights in rem, Encumbrances and Overview**) in the navigation.

New items can be added with the **button** .

## Toolbar Start

In the bar **Start** you can **add** new elements and **save, duplicate, delete** or **transfer** already captured elements. Furthermore, you can also call **tools (help, check for updates, manual, info** and many more) here.

## Toolbar Productivity

In the tab **Productivity** you find the **maintenance** and **modules** which will ease several procedures. Please mind that these modules are **premium content** so they have to be licensed separately.

## Toolbar Word processing

This software also contains a **word processing** with which you can add text modules, text, pictures, external files, tables, macros and many more to the elements of your valuation.

### Start the Word processing


The word processing feature appears **automatically** when you are in a word processing area like findings. You find the word processing toolbar **on the top** of the window.

Word processing is similar to that of Microsoft Word. Additionally, **text modules** and **macros** are available to save your time.

## Search

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**To search for clients, properties or valuations you must do the following:**

1. Select a **main filter** (clients, properties or valuations) from the list.
2. Select a **sub filter** (client number, name etc.) from the list.
3. Enter a **filter criterion** and press the button .

In the **right window** you see the **search results**. With a **double click** you can open a record.

**There are two kinds of search:**

1. **Exact search:** Is this check box activated, only records which match exactly to the search criterion will be shown.
2. If you don't activate this check box, all records which contain the search criterion will be shown.

## Output

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You can open the print dialog via the button  in the upper left corner (menu item **Print**). **There are several types of printing styles:**

- **Valuation report**  
This type is considered for detailed and extensive printing.
- **Compact**  
The goal of this output type is to keep the valuation report as compact as possible. For a better overview the information is shown in tabular form.
- **Customer overview**  
If you choose this type of output an overview of all properties including the most important information is printed.
- **Resubmission list**  
Choose this printing style if you want to re-evaluate valuations of a specific time of period.

**Note:** Please mind that the valuation has to be opened **completely** for the output.

After the contents and images a page break is added automatically. To add more page breaks, call the function **Export**.

## Settings

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### Step 1: Maintenance

Before the first use of this program you should adapt the settings according to your needs. You can define basic settings, default values and standard rates in order to unify the valuations.

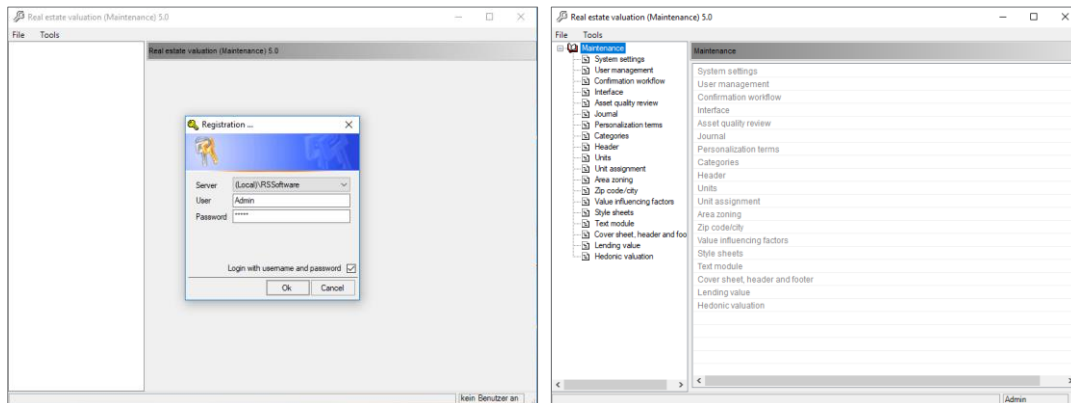
**Note:** You must log in as an **administrator** to change the settings.

**Note:** Changed settings become active if you **close** and **start** the program.

## Start



You can start the maintenance by pressing the button **Productivity**. Log in as an **administrator** in the **maintenance dialog**. In the **left frame** the sections are listed and in the **right frame** the options for the selected section are shown.



## Step 2: User management

Click on the entry **User management**. You can add and assign **roles** of each user and all information (**name, contact data, etc.**).

## Roles

The following roles are available:

- [System administrator](#)
- [Administrator](#)
- [Manager](#)
- [User](#)
- [Auditor](#)

### System administrator

This role **only exists once in the program** and is included in the **installation of the program** Real Estate Valuation. This role should be reserved to a **person with technical skills**. The **System administrator** has all rights such as:

- Right of investment or adaptation of all roles.
- Right of maintenance of all options in the maintenance.
- Right to add valuations.
- Right to confirm valuations.
- Access to all valuations.
- Right to adapt or remove valuations.

The system settings (**Tab Settings / Groups System administrator and General**) are reserved for the system administrator.

## Administrator

This role **has almost the same rights** as the **system administrator**. This means:

- Right of investment or adaptation of all roles.
- Right of maintenance of almost all options in the maintenance.
- Right to add valuations.
- Right to confirm valuations.
- Access to all valuations.
- Right to adapt or remove valuations.

The system settings (**Tab Settings / Groups System administrator and General**) are reserved for the system administrator. **The difference in visibility is as follows:**

Tab	System administrator	Administrator
Settings	Yes	Only the groups <b>Confirmation workflow, Automatic revaluation and Plugins</b> are active.

## Manager

This role has **no administrator rights**. The following rights are available:

- Only the sections **User management** and **Interface** are visible in the **maintenance window**.
- In the section **User administration**, this role only has access to the **own user data**.
- Right to add valuations.
- Access to all valuations.
- Right to adapt or remove valuations.

## User

This role has **no administrator rights**. The following rights are available:

- Only the sections **User management** and **Interface** are visible in the **maintenance window**.
- In the section **User administration**, this role only has access to the **own user data**.
- Right to add valuations.
- Access to your own valuations only.
- Right to adapt or remove your own valuations.

## Auditor

An Auditor has the same rights than a **User**. The only difference is that this role is also allowed to **confirm valuations**. The following rights are available:

- Only the sections **User management** and **Interface** are visible in the **maintenance window**.
- In the section **User administration**, this role only has access to the **own user data**.
- Right to add valuations.
- Access to your own valuations only.
- Right to adapt or remove your own valuations.

### Step 3: Cover sheet, header and footer

Click on the entry **Cover sheet, header and footer**. In this section you can maintain **cover sheets, header and footer**.

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.

#### 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.

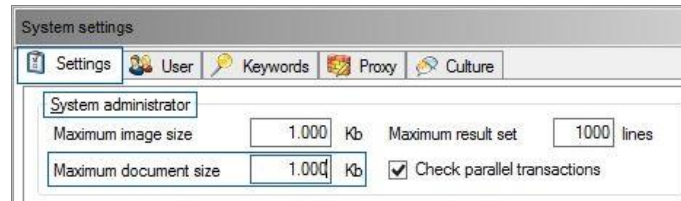
The **file size** of your cover page should never exceed **1,000 KB (1 MB)**. Otherwise the database will be affected and this could lead to performance problems.

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]
Real estate keywords	[L11]
Valuation date	[B01]
Revaluation date	[B02]
Valuation price basis	[B03]
Valuation reference number	[B04]
State of the confirmation	[B05]
Valuation keywords	[B14]
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.

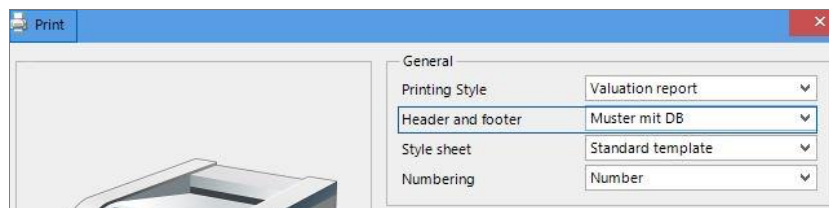
## Step 3: Adding a cover sheet

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.

## Step 4: Text module

Click on the section **Text module**. In this program a word processing program is integrated. So you can add text modules, texts, pictures, external files, tables, macros etc. to your valuations.

### Start

It is activated each time you activate the section for word processing. This is done by clicking on the tab **Word processing**.

It is similar to Microsoft Word. Additionally, there are text modules as templates and macros. These elements help you to save a lot of time.

**The following steps have to be done:**




- Select a **category** and a **language**.
- Select a **text module** and open the **context menu** by pressing the **right mouse button**. Select the desired action - [look at Context menu](#).

**Note:** The text modules are available in the tab **Word processing** of the application.

**Note:** Text modules can be structured by using style sheets (selectable in a list in the section **Text modules**).





## Context menu

Select a text module and open the **context menu** by pressing the **right mouse button**.

	Edit an existing text module.
	<p>Add a text module.</p> <p><b>The following steps have to be done:</b></p> <ul style="list-style-type: none"> <li>• Capture a <b>designation</b>.</li> <li>• In the word processing areas capture the desired text.</li> </ul> <p><b>Note:</b> Text modules can be structured by using style sheets (selectable in a list in the section <b>Text modules</b>).</p> <ul style="list-style-type: none"> <li>• To save the text module press the button <b>OK</b>.</li> </ul>
	Delete an existing text module.
<b>Save as file...</b>	Save the <b>text module</b> as a <b>file</b> in <b>any directory</b> .

## Inserting of external files, text modules or pictures, environment analysis


You find the necessary buttons in the toolbar **Word processing** in the section **Insert** on the top of the window.

 <b>External file</b>	<p>If you want to insert <b>external files</b> press this button. Select a file and choose it by pressing the button <b>Open</b>.</p> <p><b>Note:</b> Importing of documents depends on the quality of the document that has to be imported. This fact can lead to the loss of data in the word processing which appear because of the used technology. If you recognize this behavior we suggest to make a hardcopy of your source file and to insert it by the clipboard.</p>
 <b>Text module</b>	<p>Press this button to insert <b>text modules</b>. Select the desired text module in the window <b>Insert text module</b> and apply that selection by pressing the button <b>Insert</b>. You can create and edit text modules in the maintenance.</p>
 <b>Image</b>	<p>Press this button to <b>insert images</b>. Select a file and apply that by pressing the button <b>Open</b>. Because of the fact that the images are stored in the database of the software <b>Real estate valuation SC</b> we recommend to set the maximum image size in the <b>Maintenance / System settings / Tab Settings / Group System administrator / Maximum image size</b>.</p> <p><b>Note:</b> An image is automatically scaled to the defined value when you import an image at the level <b>Valuations</b> or in the <b>Word processing</b> of the software <b>Real estate valuation SC</b>.</p>
 <b>Environment analysis</b>	<p>Press this button to insert <b>environment analysis</b> and <b>micro-economic data</b>.</p> <p><b>Note:</b> To import data correctly it is absolutely necessary to enter a <b>valid property address</b>. If <b>property address is not valid</b> no micro-economic data can be integrated.</p>

## Inserting macros

Macros are **placeholders** that will be replaced automatically by the contents of data fields.

**Example:** The land registration number should be inserted automatically in the findings. When you insert the land registration number with a macro, instead of doing it manually, the value will stay up-to-date without your intervention. So if you change the land registration number in your valuation, the value in the findings will always be up-to-date.

To insert a macro press the button  in the Tab **Word processing** in the section **Insert**. Select the desired macro in the window **Insert macro** and apply that by pressing the button **Insert**.

**Note:** The check box **Insert macro as field** must be activated so that the macro always will be updated.