



Manual

Real estate valuation SC

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Immobilien. Einfach. Sicher. Bewerten.

Silver
Microsoft Partner

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Search

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.

Function of the buttons

	Press this button to cancel the search progress.
	Press this button to open the selected record.

Real estate valuation – Context sensitive help

The software **Real estate valuation** is equipped with a context sensitive help which means that you get help exactly where you need it.

How can I start the help?

To start the help, you have to click **into the input box** or **the window** and press the **F1** button. Most questions can be answered by this method.

Search function in the help

If you wish to search for terms or words **press the right mouse key** and choose **Edit / Search** in the menu or shortly press the hotkey **Ctrl + F**.

Instructions



Press the button  which is positioned in the upper left corner to execute the basic commands like **save client**, **Close client**, **Print**, **Exit program**. Furthermore, you can see an overview of the **recently opened valuations**. With this option you can access these valuations very quickly.

Toolbar Start

	Press this button to add a client.
	Press this button to add a property.
	Press this button to add a new element like valuation, land, building, building section, investment property, gross income, comparison object, object part, rights in rem and encumbrance.
	Press this button to save the client and his data.
	Press this button to duplicate the selected element.
	<p>Press this button to delete a selected element like client, property, valuation, land, building, building section, investment property, gross income, comparison object, object part, encumbrance and right in rem.</p> <p>Strategy for deleting a Client/Property/Valuation</p> <p>Client You can delete a client only if no property is assigned to him.</p> <p>Property You can delete a property only if no valuation is assigned to it.</p> <p>Valuation Module Confirmation workflow is not registered:</p> <ul style="list-style-type: none"> • A valuation can be deleted if the currently logged in user has the role Administrator or Manager. • A valuation can be deleted if the currently logged in user has the role User and if he is the owner of the valuation. <p>Module Confirmation workflow is registered:</p> <ul style="list-style-type: none"> • A valuation can be deleted if the currently logged in user has the role Administrator or Manager and if the valuation is not confirmed. • A valuation can be deleted if the currently logged in user has the role User, if he is the owner of the valuation and if the valuation is not confirmed. • A confirmed valuation can't be deleted. Exceptional case: Module Data consolidation. <p>Note that this strategy can vary in your company if you have your own strategy.</p>
	Press these buttons to apply or discard capturing.

	Press these buttons to change the order of elements.
	<p>Press this button to see all products you purchased from Sprengnetter Austria GmbH.</p> <p><u>ImMaRate (ImmobilienMarktRating)</u></p> <p>The direct transfer of the top quality reports in your findings increases the quality of your valuation reports enormously and confirms your expert knowledge. Detailed information you can find on www.immarate.at.</p>
	<p>Press this button to set the status (active, passive) of a valuation. You can also view the history or the interface options. Furthermore, you can transfer properties and valuations to a client or an existing property.</p> <p>Also the Property rating can be started. This is a standardized method to show the quality of an object. This module increases the transparency, traceability and the quality of valuations. This module is not free and has to be licensed separately.</p>
	<p>Press this button to open other information like news, internal guidelines, first steps, module registration and many more. Furthermore, you can check your program version for updates.</p> <p>The module IMMODEX from IMMOBILIEN.NET can be started. It consists of recommended prices for the estimation of residential properties. It also consists of pricing and demand data for the real estate market in whole Austria. IMMODEX is the only pricing database that is based on really actually demand data and offers an extraordinary transparency for the Austria real estate market.</p>

Toolbar Productivity

	Press this button to start the module ' Basel 2 wizard '.*
	Press this button to start the standard wizard .
	Press this button to import valuations from another database.*
	Press this button to export valuations from your own database.*
	Press this button to call the maintenance where you can set basic options like user management or style sheets.
	Press this button to start the module Automatic revaluation .*
	Press this button to start the module Automatic data transformation .*
	Press this button to start the module Data consolidation *

	Press this button to synchronize the database for the modules 'management information system' and 'reporting system'.*
	Press this button to start the module Management information system .*
	Press this button to start the module Reporting system .*

* The modules are premium content, so you have to license them 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.

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.

Format painter

This function is used to format text and can be found in the tab Word processing in the section Clipboard.

	Do the following step: <ul style="list-style-type: none"> • Mark the text which format you want to copy. • Press the button . • Mark the text to format. • Press once again the button .
---	---

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.

	Click this button to insert high quality reports of districts (by Im-MaRate).
	If you want to insert external files press this button. Select a file and choose it by pressing the button Open .

Note: 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 behaviour we suggest to make a hard-

	copy of your source file and to insert it by the clipboard.
 Text module	Press this button to insert text modules . Select the desired text module in the window Insert text module and apply that selection by pressing the button Insert . You can create and edit text modules in the maintenance.
 Image	Press this button to insert images . Select a file and apply that by pressing the button Open . Because of the fact that the images are stored in the database of the software Real estate valuation SC we recommend to set the maximum image size in the Maintenance / System settings / Tab Settings / Group System administrator / Maximum image size . Note: An image is automatically scaled to the defined value when you import an image at the level Valuations or in the Word processing of the software Real estate valuation SC .
 Macros	Press this button to insert macros. You get further information on Inserting of macros .
 Environment analysis	Press this button to insert environment analysis and micro-economic data. You get further information on Inserting of micro-economic data . Note: To import data correctly it is absolutely necessary to enter a valid property address . If property address is not valid no micro-economic data can be integrated.

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.

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]
Registered user	
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]
General	
Date	[SYS01]
Time	[SYS02]
Domain user	[SYS03]
Findings/General	
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]

Inserting micro-economic data (environment analysis)

To insert data click on the button  . You can see it in the toolbar **Word processing** in the group **Insert**.

Note: You have to insert a valid address in order to insert data successfully. If the address is not valid, no data are inserted.

Using keyboard shortcuts

The keyboard shortcuts allow you to perform the essential commands quickly and easily using the keyboard.

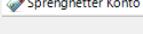
Ctrl + D	Inserting external files
Ctrl + T	Inserting text modules
Ctrl + B	Inserting images
Ctrl + M	Inserting macros
Ctrl + Z	Undo
Ctrl + Y	Repeat
Ctrl + X	Cutting text content
Ctrl + C	Copying text content
Ctrl + V	Pasting text content
Ctrl + A	Selecting the entire text content
Ctrl + F	Requesting the search
Ctrl + H	Replacing text

Using spell checker



Status line

The **status line** is shown at the **bottom** of the software **Real estate valuation SC**.

	You can see the name of the server and instance where the database is installed .
	You can see the name of the user you are logged in .
	You can maintain the Sprengnetter account of the logged in user . You can register yourself or define the login data of your existing Sprengnetter account . The other way to define it is to open the maintenance and in the user management you can define it in the tab Sprengnetter account . Note: For each user can define an own Sprengnetter account .

	<p>To register click on the button .</p> <p>Note: Registering in the Sprengnetter Shop is free and with your account you can log in to all services of Sprengnetter Software you purchased.</p> <p>If you have an Sprengnetter account, enter your login data. To save your account data click on the button .</p> <p>Note: With your login data you automatically are logged in your Sprengnetter services (e. g. ImMaRate etc.).</p> <p>Example <u>ImMaRate</u>: Add highly qualified reports of the district in the valuation</p>
	Clicking on this button  opens the Sprengnetter Shop .
	Clicking on this button opens the homepage of Sprengnetter .
	Clicking on this button opens the calculation tool of Windows .
	Clicking on this button opens the calendar and time .

Navigation area

Now you are in the navigation. Here you find the following levels:

Client

You can see all properties of the selected client including the client performance.

Properties

You can see all properties captured for the currently selected client.

Valuations

You can see all valuations captured for the currently selected property. For each valuation owner, images, documents and findings can be seen.

Land plots

DRC Value

You can see all lands captured for the currently selected property.

You can see all buildings captured for the currently selected property.

Income method

You can see all captured investment properties for the currently selected property.

Comparison properties

You can see all captured comparison objects of the currently selected property.

Encumbrances

You can see all encumbrances of the currently selected property.

Rights in rem

You can see all rights in rem of the currently selected property.

Overview

You can see the real value, income value, comparison value and market value of the property as well as a conclusion with a short summery. Also out-door facilities can be entered at the real value.

Client management

General



You can capture as many clients as you want. To capture a client press the button **New client** in the ribbon bar (Tab **Start** on the upper side).

Already captured clients can be found in the navigation at the level **Search**.

Input boxes

Client number	Capture a client number in this box.
Type	Define in the list to which category the client belongs to. New client types can be captured in the maintenance (menu item Categories).
Name	Capture the client name in this box. Additionally, you can enter a name addition in the second box. Our recommendation: Enter consistently the first name or the last name in this box.
Street	In this box capture the client address . The property address will be captured later.
Zip code, city	<p>Capture the zip code and the city in these boxes. This software contains a zip code directory for all cities (if available for the selected nation).</p> <p>Capturing can be done in the following two ways:</p> <ol style="list-style-type: none"> 1. Select the zip code and the city by the combo boxes. 2. Capture the required zip code and the city manually. <p>The suggested zip code and the city can be overwritten.</p>
Nation	In this box you can capture the desired nation. New nations can be captured in the maintenance (menu item Zip code/city).

Property data

General



You can capture as many properties as you want. To capture a property press the  button in the toolbar **Start** or the  button in the navigation at the level **Properties**.

Already captured properties can be found in the navigation at the level **Search**.

Function of the button

	Press this button to add a new property.
---	---

Context menu

The context menu is shown when you **select a property** at the level **Properties** and press the **right mouse button**.

	<p>Press this button to assign keywords to a property. Keywords mark special characteristics of a property. Examples for keywords:</p> <ul style="list-style-type: none"> • Contaminated • Self-possession • Building right • Private usage • Commercial usage • Captured for internal usage • Captured as sample <p>Properties with assigned keywords can be reported by the modules Management information and Reporting system.</p> <p>You can maintain and capture keywords in the maintenance (menu item System settings / Tab Keywords)</p>
	Press this button to duplicate the selected property.
	Press this button to transfer the selected property inclusive all its valuations to another client. Transferring a property
	Press this button to delete the selected property.
	Press these buttons to change the order of the properties.

Transferring a property

Each property can be transferred to an **existing client**. This can be done in the following two ways:

1. **Select the desired property** in the navigation at the level **Properties** and press the button  in the tab **Start / Transfer property**.
2. **Select the desired property** in the navigation at the level **Properties** and press the **right mouse button / Transfer**.

In the dialog **Search** perform the following steps:

1. Select a **sub filter** (client number, name etc.) in the dropdown list.

2. Capture a value to search for and press the button .

In the bottom of the dialog the results are listed. Click twice on an entry to start the transfer.

Searching can be done in two ways:

1. **Exact search:** If the check box **Exact search** is marked, only the records are listed that exactly match the value.
2. If the check box is not marked, all records that include the value are listed.

Function of the buttons

	Press this button to end the transfer .
	Press this button to cancel searching .

Input boxes

Type	Select to which category the property belongs to. With this information you can generate reports (e.g. Reporting system). New property types can be captured in the maintenance (menu item: Categories). Press the button  at the field Type to define the type of the property. This drop-down list offers an easy access on the list of possible types. The types are sorted in the same way as in the maintenance . In the dialog Categories you find a predefined list. Choose the desired type and press the button  to accept it. In the input field Suchbegriff  you can search for the desired type. Note: The assignment can be done by the drop-down list or hierarchically .
Designation	Capture the exact designation in this box. Press the  button to assume the above entered property type.
Identifier	Capture an identifier in this box.
Land registration number	In this box you can capture the land registration number according to the land register.
District court, Land register	Capture the district court and the land register in these boxes. This software contains a district court directory with the belonging land registers (if available for the selected nation) . Press the  button to activate the required combo boxes for these boxes. Select the district court first. By pressing the initial letter, you will get directly to the first record which starts with that letter. In the next step select the land register. The land registration number will be adopted automatically.
Economic entity	In this box capture the economic entity . This input box is only visible if the option Economic entity – Top enabled is marked in the maintenance (menu item: System settings / Tab Settings).
Street	Capture the property street in this box.

	In these boxes capture the zip code and the city . This software contains also a zip code directory with the belonging cities (if available for the selected nation) .
Zip code, city	There are two ways of input: <ol style="list-style-type: none"> 1. Select the zip code and the city by the dropdown list. 2. Capture the required zip code and city manually. <p>The suggested zip code and city can be overwritten.</p>
Nation	Capture the nation here. New nations can be captured in the maintenance (menu item: Zip code/city).

Valuation data

General

You can capture as many valuations as you want. To capture a valuation press the  button in the toolbar **Start** or the  button in the navigation at the level **Valuations**. Already captured valuations are listed here in tabular form.

You can **open** the required valuation by a **click**.

Capturing a valuation by the standard wizard

Press the button  in the toolbar **Productivity** in the ribbon bar to open the **standard wizard** with which you can perform a valuation in few steps very quickly. Standardized priced are used in this assistant.

The following wizards are available:

- Single family house
- Condominium (reconstruction value)
- Condominium (comparative value)

New wizards and standardized prices can be captured in the module **Maintenance / Wizard**.

Function of the buttons

	Press this button to capture a new valuation (Standard valuation).
<input type="checkbox"/>	With this check box you can hide passive valuations in the list.

Context menu

You can open the context menu by pressing the **right mouse button** on the required valuation at the level **Valuations**.

	Press this button to open the module Property rating .
	Press this button to open the interface options .
	Press this button to open the valuation history . You can see if there was an automatic re-evaluation, a data transformation or a confirmation of a valuation.
	Press this button to assign keywords to a valuation . Keywords define specific properties of a valuation. Valuations with keywords can be evaluated with the management information system or the report manager . Keywords can be managed in the maintenance at the level system settings in the tab Keywords .
	Press these buttons to set the status of the valuation (active or passive).
	Press this button to duplicate a selected valuation. Duplicating a valuation
	Press this button to transfer the selected valuation to an existing client or existing property. Transferring a valuation
	Press this button to delete the selected property.
	Press these buttons to change the order of the valuations.

Tab Valuation

Input boxes

Valuation date	In this box you can capture the valuation date .
Revaluation date	Capture the revaluation date in this box. This is a schedule reminder with which you can mark a valuation for revision.
Price basis	Define the price basis for the object in this box.
Calculation	Select if the market value, the fair market value or the collateral value is used for the calculation. This selection affects the overview level and the output.
Valuation status	Define the status of the valuation . Mind that just one valuation can be active . The status active marks the current valuation.
Reference number	Capture the reference number . You can also search for this value in the search level.
User (creator)	The valuation will be assigned automatically to the creator. To change the assigned user presses the button  . In the dialog select the desired user and assign it.*
Purchase price	Define a purchase price . Note that the value of the purchase price is

	used for the calculation of the purchase price benchmarks .
Type of transaction	Define the type of transaction .
Transaction date	Define the transaction date .

*If you use the confirmation workflow please mind that an automatically confirmed valuation changes its status to **manually confirmed** if you change the creator or user afterwards.

Duplicating a valuation



Press this button to **duplicate** a valuation. Select the required valuation at the level **Valuations** and press the button. In the dialog **Duplicate valuation**, you can **change the valuation date, adjust remaining technical and economic life expectancy**. If the check box **View new valuation** is marked, the new valuation will be opened.

You find that button in the tab **Start** on the top of the window.

Transferring a valuation

You can transfer **each valuation** to an **existing client** or to an existing **property**. **Transferring can be done in the following two ways:**



1. Select the desired valuation in the navigation at the level **Valuations** and press the button in the tab **Start** and select **Transfer valuation**.
2. Select the **desired valuation** in the navigation at the level **Valuations** and press the **right mouse button** and select **Transfer**.

In the dialog **Search** perform the following steps:

1. Select a **main filter** (clients, properties) in the dropdown list.

Note:

When selecting the main filter **Clients**, the desired valuation is transferred to an existing client. The property data is automatically created for it.

When selecting the main filter **Properties**, the desired valuation is transferred to an existing property.

2. Select a **sub filter** (client number, name etc.) in the dropdown list.
3. Capture a value to search for and press the button .

In the bottom of the dialog the results are listed. Click twice on an entry to start the transfer.

Searching can be done in two ways:

1. **Exact search:** If the check box **Exact search** is marked, only the records are listed that exactly match the value.
2. If the check box is not marked, all records that include the value are listed that.

Function of the buttons

	Press this button to end the transfer .
---	--



Press this button to **cancel searching**.

Tab Owner

You can capture as many owners (with ideational ownership or also with condominium units) as you want. To capture an owner press the button in the tab **Owner**.

You can capture the ownership data (designation, numerator, denominator or blnr) in a tabular form.

Tab Images

You can capture **as many images** for a valuation as you want. **Capturing can be done in the following ways:**

1. To capture **a single image** press the in the tab **Images**.
2. To capture **several images** press the button in the tab **Images**.

Note: The **name of the images** (Image 1, Image 2, Image3 etc.) is defined **automatically** and **can be adapted**.



Press the button to add a **satellite picture** or a **street map** on which you can see the surroundings of the property and the development. In the dialog **Environment analysis** press the button **Apply** to create an image of the environmental analysis automatically.

Note: For the **environment analysis** it is absolutely necessary to enter data according to **Bing Maps** (e.g. AT for Austria) for the selected nation in the maintenance at the level **Zip code/cities**. If data are not correct no environment analysis can be inserted and you get the error "The address cannot be found".

In the tab **Preview** you get a **preview** of the **captured images**.

Function of the buttons

	Press this button to confirm your inputs the settings and create an image.
	Press this button to cancel the capturing of an image.
	Press these buttons to apply or discard all your inputs.

Tab General

To insert an image, the following steps, have to be done:

1. Enter the desired **designation**. To define an image for the cover sheet, the image designation must contain the term "**[DECKBLATTBILD]**".
- Note:** The **name of the images** (Image 1, Image 2, Image3 etc.) is defined **automatically** and **can be adapted**.

2. Import an image by pressing the button **Browse....** select the file(s) and press the button **Open**.

Note: Because of the fact that the images are stored in the database of the software **Real estate valuation SC** we recommend to set the maximum image size in the **Maintenance / System settings / Tab Settings / Group System administrator / Maximum image size**.

Note: An image is automatically scaled to the defined value when you import an image at the level **Valuations** or in the **Word processing** of the software **Real estate valuation SC**.

3. Select the desired **category**.
4. The check box **Store image in database** is always **activated**. You cannot deactivate it. All images will be stored in the database of the software **Real estate valuation SC**.
5. To capture the image press the  button.

Tab Description

In this tab you can enter a description of any length for an image with the help of the integrated word processing. You can also insert text modules, text, images, externals files, tables, macros and much more here.

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.

Tab Preview

In this tab you can see a preview of an image.

Tab Documents

You can capture documents like **digitized blueprints, cadastral plans and many more** to a valuation by pressing the  button in the tab **Documents**.

Function of the buttons

	Press this button to add a document.
	Press this button to discard capturing.
	Press these buttons to apply or discard capturing.

Context menu

You can open the context menu by selecting a document at the level **Valuations** and pressing the **right mouse button**.

	Press this button to open the preview for an existing document. This document is automatically opened with the appropriate program .
	Press this button to duplicate a document.
	Press this button to delete a document.
	Press this button to export a document.

Tab General

In the tab **General** you have to perform the following steps:

1. Enter the desired **title**.
2. With the button **Browse...** you can **import a file**. In the following dialog select the desired file and confirm that by pressing the button **Open**.

Note: The captured documents are saved in the database and can be printed. In the **printing dialog** you can define which documents to print.

3. To capture the document press the button.

Tab Description

You can enter a description of any length in this tab.

Tab Findings

In this tab you can enter a finding of any length with the help of the integrated word processing. You can also insert text modules, text, images, externals files, tables, macros and much more here.

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.

Lists

List of areas

In the tab Findings the current situation of a property is shown. Macros help you to list all your lands and buildings with all building sections.

List of annual gross income, rights in rem and encumbrances

Macros help you to manage your gross incomes, rights in rem and encumbrances.

Adding a list (macros)

Macros are placeholders. If you use macros, the content automatically is integrated in the word processing.

Example: In the findings all lands inclusive all areas automatically are integrated as a list. Integrating the list as a macro in the findings always keeps the list automatically actual. Even you change data, data are automatically actualized.

To add a macro user presses the button . You find it in the ribbon bar **Word processing** in the group **Insert**. In the dialog **Insert macro...** select the desired macro in the category **Findings/General** and insert it by pressing the button **Insert**.

Note: The check box **Insert macro as field** has to be activated to automatically actualize the macro.

Macro list

The following list macros are available:

Findings/General	
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]

Environment analysis

In the tab **Findings and in all descriptive dialogs** you can integrate locations of specific interest near the address of the currently selected property directly in to the text. The following categories are available:

- Health
- Schools, Education
- Authorities, Banks, Places of worship
- Leisure, Entertainment
- Traffic, Busses, Taxis
- Subway, Rail Station
- Restaurants, Supermarkets, Food

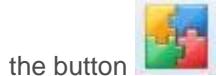
Integration of environment analysis

To insert data click on the button  . You can see it in the toolbar **Word processing** in the group **Insert**.

Note: You have to insert a valid address in order to insert data successfully. If the address is not valid, no data are inserted.

Immobilienmarktrating (ImMaRate)

In the tab **Findings** and in all other tabs you can integrate high quality reports of the districts by pressing



ImMaRate is profitable – already from your first valuation! Your advantages at a glance:

- Basis for the description in **your finding**
- Check of the **sustained yield of the market prices and rents**
- **Valorisation of the comparable prices** of the valuation date
- Actual **data of your district** (economic and social demographic data)
- **Total summary of the market**

Detailed information you find on www.immarate.at.

Property rating

This is a **standardized method** to show the quality of an object. This module increases the **transparency** and **reproduction** of valuations and therefore also the **quality**. It is not free and has to be licensed separately. **The following categories are available:**

- Wohnen
- Büro
- Handel
- Lager/Logistik

Note: Values are available from the year 2013. **No Property rating** can be done for **valuation dates before 2013**. It is available from the level **Valuations** for the criteria group "**Markt**" (**national or international**) that means the **valuation date has to be opened**. Property rating is only available for **Austrian properties**.

Note: When you **start the property rating** and the message "nicht verfügbar" is shown, you have to enter the **short description of the desired nation** in the **maintenance** in the section [Zip Codes/city](#). For Austria often **AUT** is entered, but the **international valid short description** is **AT**. If you **correct the short description**, property rating **starts successfully**.

Start

To open the property rating you need to open the valuation date of the property.

Tab Start

Button **Other / Property rating**.

Context menu

You are positioned on the level **Valuations**. Mark the desired valuation date and activate the **context menu** (right mouse key / **Property rating**).

Handling

In the first step define the **desired federal state** and the category by the drop-down lists. To start property rating presses the button .

Depending on the selected category you can define step by step the ratings in the tabs **Standort, Objekt, Cash Flow or Markt** by the drop-down lists.

Sprengnetter Tip: You can define the ratings easily when you set the cursor first in the **first list of the dialog**, enter the rating by pressing the **number key** and then press the tab key to select the next list. When you use this way no selection with the mouse is necessary.

Having entered all ratings in a tab press the button to calculate the **total rating**. When you press the button the **property rating is integrated in the current valuation** or can be **printed** as a part of the valuation. To **delete a property rating** presses the button . To **cancel input of the property rating** press the button . To **get help to the property rating** press the button .

Print

The property rating is integrated at the **end of the valuation**. You can see the preview in the tab **Preview** at the level **Valuations** or in the printing preview at the print dialog.

Tab History

In this tab, **automated history entries (value adjustments)**, which were created using the additional module **Automatic Revaluation** (additional module, which is subject to a fee), are logged in a comprehensible manner for a manually created **evaluation over time**. This avoids garbage data that arose in the **automatic revaluation version 1.0** due to the ongoing creation of new valuation dates.

Important information: The tab **History** is only **visible** if the **Automatic Revaluation** has already been carried out once when the evaluation key date is open.
 If the tab **History** is visible, the opened valuation date is **automatically blocked**. This can be recognized by the symbol or the text **Brief overview (valuation suspended)**. Changes to the open valuation date can now only be made using the **Duplicate function** on the valuation level. Furthermore, the **history entries are not copied with the duplicate**.

You can find more detailed information on activation and operation in the **Automatic Revaluation manual**.

Tab Preview

In the tab **Preview** you can directly preview a valuation without starting a print. With the integrated function **Search** you can navigate in the document.

Land plots data

General

You can capture as many land plots as you want for a valuation. To capture a land plot you have to press



the button in the toolbar or the button in the navigation at the level **Land plots**. Already captured land plots are listed in tabular form.

You can open the required valuation with a **click**.

Sprengnetter recommendation: If a property has several land plots, it is useful to **unite land plots with the same dedication and price per sqm**.

It can also happen that one land plot is **split up in several parts** due to different prices caused by different dedications. In that case you must capture a separate land plot for every area with a separate price.

Function of the button



Press this button to **capture a land plot**.

Context menu

You can open the context menu by selecting the desired land plot at the level **Land plots** and pressing the right mouse button.

	Press this button to duplicate a land plot.
	Press this button to delete a land plot.
	Press these buttons to change the order of the land plots.

Tab Land

Input boxes

Plot number	Capture the plot number in this box. If you combine several land plots you can make a reference on the number of land plots and land register here.
Designation	In this box capture a designation .
Zoning	You can capture the zoning here. Pressing the  button activates combo boxes for that. Select the zoning category first. By pressing the initial letter, you will get directly to the first record which starts with that letter. New zonings can be captured in the maintenance (menu item: Area zoning).
Development	Define the development state of the land. Pressing the button  activates the combo boxes for that. By pressing the initial letter you will get directly to the first record which starts with that letter.
Floor space ratio	In this box capture the floor space ratio .
Amount in sqm	Capture usable area or land size here.
Basis	Define the type of the land in this box.
Price per sqm	<p>In this box capture the price per sqm.  When you click on the button the module Comparative price is opened. Note: This module is free for customers with active service contract. See further information at the manual Comparative price (Purchasing Price).</p> <p>By pressing the  button you can browse in published price indexes to check your market estimation.</p> <p>Note: To analyse the price press the button . To accept the price user presses the button Ok. With this procedure the link to the real estate price comparison list is created and the automatic revaluation can be started.</p> <p>If you have set a reverence price, the button  is enabled. By pressing the button  and selecting the option  the price and the link is reset.</p>
Increase / decrease	By pressing the  button you can capture an increase or a decrease.
Land value pro rata	In this box capture the land value pro rata . These boxes are only visible if the check box View land interests is marked in the Maintenance / Categories for a property type .

Capturing of value influencing factors

You can capture as many increases and decreases as you want. To capture an increase or a decrease press the button  in the tab **Land**.

In the dialog **Edit value influencing factors** there are two kinds of capturing increases and decreases:

1. You can capture them manually by pressing the button  . Now you are positioned in the tab **Detail**.

In this tab the following steps have to be done:

- Select the desired calculation type in the tab **General**. **The following calculation types are available:**
 - Percent
 - Amount
 - Unit
 - **Fair market value of temporary annuity**
You can additionally activate an auxiliary calculation for the calculation of a monthly rate. This is done when you mark the check box **Auxiliary calculation**.
 - **Fair market value from final value**
You can additionally activate an auxiliary calculation for the calculation of a monthly rate. This is done when you mark the check box **Auxiliary calculation**.

Now capture the values.

- In the tab **Description** you can capture texts of any length.
 - To confirm your inputs press the button  . All increases or decreases will be listed in tabular form in the window **Edit value influencing factors**. 
2. You can also capture the value influencing factors with a wizard. Therefore press the button  . In the wizard predefined guiding prices are available. Select the desired category for a value influencing factor in the combo box. To active a guiding price, mark the desired price and press the button  . In the tab **Detail** the price is shown and can be edited to change the price. To confirm a price press the button  .

You can edit or capture the wizard prices in the **maintenance** (menu item: **Value influencing factors**).

Function of the buttons

	Press this button to confirm a price.
	Press this button to cancel capturing.
	Press these buttons to apply or discard capturing.
	You can close the window Value influencing factors with this button. The sum of the increases or decreases will be adopted in the tab Land .

Context menu

You can open the context menu by selecting an increase or decrease in the dialog **Edit value influencing factors** and pressing the **right mouse button**.

	Press this button to duplicate an increase or decrease.
	Press this button to delete an increase or decrease.
	Press these buttons to change the order.

Tab Description

In this tab you can capture texts of any length. In the word processing module, you can add text modules, texts, external files, images, tables, macros and many more.

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.

DRC value data

General

You can capture as many buildings as you want for a valuation. Therefore press the  button in the toolbar or the  button in the navigation at the level **DRC value**. Already captured buildings are listed in tabular form.

You can open the required building with a **click**.

Function of the button

	Press this button to capture a building .
---	--

Context menu

You can open the context menu by selecting the desired building at the level **DRC value** and pressing the **right mouse button**.

	Press this button to duplicate a building.
---	---

	Press this button to delete a building.
	Press these buttons to change the order of the buildings.

Tab Building

Input boxes

Classification	Select the building classification here. Press the button  to assign a type to the building. This drop-down list offers an easy way to select a type by a list. The types are sorted in the same way than in the maintenance . The dialog Categories is opened, in which you find a predefined list . Mark the desired type and accept it by pressing the button  . In the input field <input type="text" value="Suchbegriff"/> you can search for the desired type. Note: The assignment can be done by a list or hierarchically .
Designation	Capture the designation of the building in this box. By pressing the  button you can adopt the above entered classification.
Year of construction	Capture the year of construction .
Fictional year of construction	Capture the fictional year of construction . If the building was completely or partially reconstructed, you have to capture the fictional year of construction.
Life expectancy	In this box capture the life expectancy .
Unexpired life	Capture the unexpired life here.
Construction costs	You can capture a new building section by pressing the button  in the section Construction costs .

Capturing of building sections

You can capture as many building sections as you want in order to calculate the construction costs.

This can be done in one of the two possible ways:

1. Select the desired building in the navigation at the level **DRC value** and press the  button in the toolbar **Start** and select **Building section** or the  button in the section **Construction costs**. If you have already captured some building sections, they are listed in the tab **Building costs** in tabular form. You can open the required entry with a click.
2. In the tab **Table input** building sections can be captured faster and more effective.

Select the desired building in the navigation at the level DRC value and activate the tab **Table**

 **input** in the tab **Building**. Select a classification from the combo box. Then press the  button in the tab **Table input**.

Capturing the data is done in tabular form by pressing the Tab-key.

A click on a building section opens it for editing.

If you want to delete a building sections, select a building section and call the action **Delete** in the context menu or press the **Del**-key.

3. Zoom-Out for detailed inputs



When you press the button you activate capturing in the **dialog mode**. This kind of capturing makes more space available if you use a small display or a display in the 16:9 formats.

Capturing data is equivalent to **1** and **2**.

Input boxes

Depending on the calculation type the following input boxes are active:

Type	Capture the calculation type here.								
Designation	Capture the designation in this box.								
Quotation	<p>Capture the price type. Note: If you capture a building based on the fair value, no decreases are shown in the tab Value of building.</p>								
Number, Unit	Capture the number or the units here. New units can be captured in the maintenance (menu item: Units).								
Gross floor area or dimension	<p>By pressing the button you can capture the gross floor area or the dimension. Therefore press the button in the dialog Edit area/dimension. Select the required calculation type in the tab Area. Capture additionally a designation and define whether the area or the geometric body should be added or subtracted from the total area or total dimension. Therefore, activate the check boxes Plus or Minus. After that enter the proportions in the section Calculation.</p> <p>To confirm your data press the button. All captured areas are listed in a tabular form in the dialog Edit area/dimension.</p> <p>Functions of the buttons</p> <table border="1"> <tbody> <tr> <td></td><td>Press this button to confirm your data.</td></tr> <tr> <td></td><td>Press this button to cancel capturing.</td></tr> <tr> <td></td><td>Press this button to apply or discard your data.</td></tr> <tr> <td></td><td>Pressing this button closes the dialog Edit area/dimension and the total area or total dimension is shown in the box</td></tr> </tbody> </table>		Press this button to confirm your data.		Press this button to cancel capturing.		Press this button to apply or discard your data.		Pressing this button closes the dialog Edit area/dimension and the total area or total dimension is shown in the box
	Press this button to confirm your data.								
	Press this button to cancel capturing.								
	Press this button to apply or discard your data.								
	Pressing this button closes the dialog Edit area/dimension and the total area or total dimension is shown in the box								

	Gross floor area in section Building.
Reduction / net area	Capture a reduction for the net area here if necessary. Note: If capturing of a net area is done in the box Gross floor area , no value has to be captured in the input box Reduction / net area .
Price per sqm / cbm	Capture the price per sqm/cbm here. When you click on the button  the module Comparative price is opened. Note: This module is free for customers with active service contract . See further information at the manual Comparative price (Purchasing Price) . Via the button  (it is only active at a price per sqm) you can search for a guiding price. With that you can check your interpretation of the market. To analyse the price, press the button  . To accept the price, press the button Ok . With this procedure the link to the real estate price comparison list is created and the automatic revaluation can be started. If you have set a reverence price, the button  is enabled. By pressing the button  and selecting the option  the price and the link is reset .
Degree of completion	Press the button  to capture the degree of completion . Note: There are two ways of capturing of the degree of competition. Either at the building section in the tab Building or at the building in the tab Value of building . Please mind that only one method is necessary. Building sections, evaluated with the fair value, have no need of a value correction . So no value is shown at the value influencing factors in the tab Building value . There are two ways of capturing in the dialog Edit value influencing factors: <ol style="list-style-type: none"> 1. You can create an increase or decrease by pressing the button . Now you are positioned in the tab Detail. <p>The following steps have to be done: In the tab General you can capture the key data.</p> <p>In the tab Description you can capture a description with any length.</p> <p>To confirm your data press the  button. All value influencing factors are shown in tabular form in the section Edit value influencing factors.</p> <ol style="list-style-type: none"> 2. You can also capture data with a wizard. To start the wizard, press the button . Predefined guidelines are available in the wizard. Select the desired category in the combo box. To activate a guideline, select it and  press the  button. The value will be adopted in the tab Detail where you can edit it. <p>To confirm your data press the  button. All value influencing factors are shown in tabular form in the dialog Edit Value influencing factors.</p> <p>You can capture and edit the guidelines in the maintenance (menu item: Value influencing factors).</p>

Functions of the buttons	
	Press this button to confirm your data.
	Press this button to cancel capturing.
	Press this button to apply or discard your data.
	Pressing this button closes the dialog Edit value influencing factors and the total area or total dimension is shown in the box Gross floor area in section Building .

Function of the buttons

	Press this button to confirm your data.
	Press this button to cancel capturing.
	Press this button to apply or discard your data.

Context menu

You can open the context menu by selecting the desired building section and pressing the **right mouse button**.

	Press this button to duplicate a building section.
	Press this button to delete a building section.
	Press these buttons to change the order.

Tab Value of building

Button - Value influencing factors

If you press this button, you can **capture value influencing factors**:

- **Building costs**

Per default building costs are included in the building section at the tab **Building**. If not, you can capture the building costs here.

- **Degree of completion**

You can capture the degree of completion in two ways, either in the **building section** at the tab **Building** or at the **building** in the tab **Value of building**. Please mind that you use only one of the two procedures.

If you capture a building based on the **fair value**, no decreases are shown in the tab **Value of building**.

- **Construction defects, structural damage**
- **Decrease in value**
- **Decrease in value - Subtotal**
- **Increase in value**

Capturing value influencing factors

At the value influencing factor press the button  to open the dialog **Edit value influencing factors**. Capturing is possible in the following two ways:

1. You can capture a value influencing factor manually with the button . Now you are positioned in the tab **Detail**.

The following steps have to be done:

- At the tab **General** you can capture the **basic data**.
- At the tab **Description** you can capture texts of any length.
- To confirm your data press the  button. All **value influencing factors** are shown in tabular form in the dialog **Edit value influencing factors**.

2. You can capture data by a wizard. To start the wizard, press the button . Now you are in the dialog **Wizard**. Predefined guidelines are available here. Select the **desired category** in the  combo box. To activate a guideline, select it and press the  button. The value is adopted in the tab **Detail** where you can edit and change it if necessary.

To confirm your data press the  button. All **value influencing factors** are shown in tabular form in the section **Edit value influencing factors**.

You can capture and edit the guidelines in the **maintenance** (menu item **Value influencing factors**).

Function of the buttons

	Press this button to confirm your data.
	Press this button to cancel capturing.
	Press this button to apply or discard your data.
	Pressing this button closes the dialog Edit value influencing factors and the calculated value is shown in the appropriate box.

Context menu

You can open the context menu by selecting an existing increase or decrease in the dialog **Edit value influencing factors** and pressing the **right mouse button**.

	Press this button to duplicate a value influencing factor.
	Press this button to delete a value influencing factor.
	Press these buttons to change the order of the value influencing factors.

Additional information - depreciation

The following types are available:

- **Depreciation (linear)**

The objective value is fully depreciated with the same yearly amount for the period of total useful life of the building

Formula:

$$W = \frac{A}{GND} \times 100$$

It means:

W = impairment in %

A = age of the building in years

GND = usual total useful life of the building in years

- **Depreciation (linear, condition state)**

The depreciation is calculated according to the depreciation table of Ross-Heideck here.

- **Depreciation (progressive)**

In contrast to linear depreciation, this form shows a slight progression. Depending on the current market situation, it is used, for example, for owner-occupied residential properties (one- and two-family houses) in very popular regions.

Formula:

$$W = \frac{1}{2} \times \left(\frac{A^2}{GND^2} + \frac{A}{GND} \right) \times 100$$

- **Depreciation (progressive, condition state)**

The depreciation is calculated according to the extended depreciation table of Ross-Heideck here.

General

If the degrade of the state of the building is bigger than usual, then the calculation of the depreciation can cause a large effort. The reason therefore is that you have to define the state of the building very precisely and you also should have detailed knowledge of the calculation.

More and more methods to calculate the state of a building have found approval.

Depreciation

One of the methods was introduced by HEIDECK in the year of 1935 and is called depreciation. This method decreases the fair value by a percentage value of the age of the building (ROSS or linear) and is added to the decrease because of the age.

HEIDECK: If you want to calculate an additional depreciation because of the state of the building a mostly unified estimation about the state of the building has to exist. The uniformity of the estimation is shown in the following condition states that have been realized in practice.

The condition states are:

- 1 = new, without repairs
- 2 = normal maintenance
- 3 = in need of repair
- 4 = big repairs needed
- 5 = worthless

For fine grading take the values 1.5 or 2.5. The remaining residual is to decrease at the condition state

1,0	by	0,00 %
1,5	by	0,32 %
2,0	by	2,52 %
2,5	by	8,09 %
3,0	by	18,10 %
3,5	by	33,20 %
4,0	by	52,60 %
4,5	by	75,20 %
5,0	by	100,00 %

The description of the condition states varies less in practice.

Zustandsnote	Bezeichnung Heideck	Bezeichnung jetzt
1	neu, ohne Reparaturen	neuwertig, mängelfrei
2	normale Unterhaltung geringen Urfanges	normal erhalten, nur übliche Erhaltungsarbeiten
3	reparaturbedürfig	(deutlich) reparatur-(instandsetzungs-) bedürfig
4	große Reparaturen erforderlich	umfangreiche Instandsetzungen erforderlich
5	wertlos	abbruchreif, wertlos

The following depreciations are available:

ZUSTANDSNODE	WERTMINDERUNG %
1,00	0,00
1,50	0,32
2,00	2,49
2,50	8,09
3,00	18,17
3,50	33,09
4,00	52,49
4,50	75,32
5,00	100,00

A slight difference of these values can occur because of rounding problems.

- **Depreciation (parabolic)**

The parabolic depreciation shows a strong progression, with which the depreciation amounts increase with increasing age. After the usual total useful life, the impairment is 100 %.

- **Depreciation (manual)**

Tab ESG

Here you can enter the **energy efficiency indicators** of a property, which can be taken from an **existing energy certificate**.

- **Specific heating demand (HWB)**

This is the most important value. The heating demand describes the amount of heat that has to be added to the rooms in order to maintain a room temperature of 22 ° C at the location of the building (SK = location climate).

- **Primary energy demand (PEB)**

The primary energy demand includes the entire energy required for the building including the expenditure for energy generation (production, transport). It is an indicator of the need for energy resources. The value plays a role, for example, when using district heating or electricity as an energy source.

- **Carbon dioxide emissions (CO2)**

This parameter describes the carbon dioxide emissions attributable to the total energy demand in the building, including those for transport and generation as well as all losses. It is an indicator with regard to climate protection.

- **Total energy efficiency factor (fGEE)**

The total energy efficiency factor describes the efficiency of the building including the building services systems. The building in its entirety is compared to a building of the same geometry. The smaller this value is, the more efficient the building is.

Tab Description

With the integrated word processing you can capture texts of any length. You can also insert text modules, texts, images, externals files, tables, macros and much more here. You find the formatting bar on the upper side of the window.

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.

Income method data

General

You can capture as many investment properties as you want for a valuation. To capture an investment



property, press the  button in the toolbar **Start** and select **Income method** or the  button in the navigation at the level **Income method**. Already captured investment properties are listed in tabular form.

You can open the desired investment property with a **click**.

Function of the button

	Press this button to capture an investment property.
---	---

Context menu

You can open the context menu by selecting the **desired investment property** at the level **Income method** and pressing the right mouse button.

	Press this button to duplicate an investment property.
	Press this button to delete an investment property.
	Press these buttons to change the order of the investment properties.

Tab Investment property

Input boxes

Designation	Capture the designation of the investment property in this box. If a building was assigned in the tab Associated buildings the building designation can be assumed by pressing the button  .
Property yield	Capture the property yield here.
Unexpired life	In this box you can capture the unexpired life . If a building was assigned in the tab Associated buildings the building designation can be assumed by pressing the button  Note: The economic unexpired life may not be greater than the unexpired life of the building.

Tab Gross income

You can capture as many gross incomes as you want. To capture gross incomes press the  button in the toolbar **Start** and select **Gross income** or the  button in the tab **Gross income**. If you have already captured gross incomes, they are listed here in tabular form.

You can open the required entry with a **click**.

Capturing gross incomes

There are four types of capturing:

1. Manually by pressing the button  in the tab **Gross income**. Now you are in the tab **Detail**. Capture the basic data.

To confirm your data press the  button. All **gross incomes** are shown in tabular form in the tab **Gross income**.

2. Capturing also can be done by the associated buildings. Therefore, mark the desired building in the tab **Associated buildings**. Then go to the **tab Investment property -> tab Gross income -> tab Building sections**. Here you see the already captured building sections. Mark the desired

building section and press the button  . In the tab **Detail** you can **edit or confirm** these values.

To save the data press the button  . All captured gross incomes are listed in the tab **Gross income** in tabular form.

3. Capturing by the **table input**.

Select the desired investment property in the navigation at the level **Income method** and activate the tab **Table input** in the tab **Investment property**. Select a type from the combo box. Press

 the  button in the tab **Table input**.

Capturing the data is done in tabular form by the Tab-key.

A click on an investment property in the tab **Table input** opens it for editing. If you want to delete an investment property, select one in the tab **Table input** and press the **right mouse key** and select **Delete** or press the **Del-key**.

4. **Zoom-Out for detailed inputs**

 When you press the button  you activate capturing in the **dialog mode**. This kind of capturing makes more space available if you use a small display or a display in the 16:9 formats.

Capturing data is equivalent to 1, 2 and 3.

Function of the buttons

	Press this button to confirm your data.
	Press this button to cancel capturing.
	Press this button to apply or discard your data.

Context menu

You can open the context menu by selecting the **desired investment property** at the level **Income method** and pressing the right mouse button.

	Duplicates a gross income.
	Deletes a gross income.

	Changes the order of the gross incomes.
---	---

Calculation type: Units

Select the calculation type **Units** if you want to capture rental income on units (e.g. parking spaces).

Tab Gross income

Enter the **desired designation** and select a **period of time**. Define the **calculation basis**. In the input box **Number, unit** you can capture the **number** and the **unit type**. Capture the **rent per unit** and the result will be the annual gross income or the monthly rent.

Calculation type: Rent

Select the calculation type **Rent** if you want to capture a **rent price per sqm**.

Tab Gross income

Enter the **desired designation** and select a **period of time**. Define the **calculation basis**. In the input box **Number, unit** capture the **rent price per sqm**. Via the button  you can search for a guiding price of the rent per unit. With that you can check your interpretation of the market.



Note: To analyse the price, press the button . To accept the price, press the button **Ok**. With this procedure the link to the real estate price comparison list is created and the automatic revaluation can be started.



After the confirmation of the reference price, the button  is enabled. Press the button  again to delete the connection with the button .

The result is the annual gross income or the monthly rent.

Calculation type: Units (flat-rate)

Select the calculation type **Units (flat-rate)** if you want to capture the rent income flat rate.

Tab Gross income

Enter the **desired designation** and select a **period of time**. Define the **calculation basis** and enter the **amount**. The result is the annual gross income.

Calculation type: Percentage rent

Select the calculation type **Percentage rent** if you evaluate a **touristic and trading property**.

Tab Gross income

Enter the **desired designation** and select a **period of time**. Define the **calculation basis**. Capture the **sales** and the **rental rate in %**. The result is the annual gross income.

Calculation type: Sales (units)

Select the calculation type **Sales (unit)** if you want to capture the sales by units (e.g. parking spaces).

Tab Gross income

Enter the **desired designation** and select a **period of time**. Define the **calculation basis**. In the field **Number, unit** you can capture the number and the unit type. Capture the **sales per unit** and the **rental rate in %**. The result is the annual gross income.

Calculation type: Lease sales (units and utilization)

The calculation type **Lease sales (units and utilization)** can be used when the **percentage rent** is calculated with units (e.g. parking spaces) and the utilization.

Tab Gross income

Enter the **desired designation** and select a **period of time**. Define the **calculation basis**. In the field **Number, unit** you can capture the number and the unit type. Enter the utilization in the input box **occupancy rate, unit** and select the unit type. Enter also the **sales per unit** and the **rental rate in %**. The result is the annual gross income.

NOTIONAL RENT - Structural vacancy

For each gross income you can define the calculation basis by a dropdown box (**effective, notional, notional self-interest, notional vacant**).

Note: When you define the calculation basis **notional, vacant**, the calculation of the vacancy rate is done as a benchmark - look at [Benchmarks](#).

OVERRENTED- and UNDERRENTED RENTS

Gross incomes (types **Rent or Units**) also can be calculated by **Overrented- or Underrented rents**. This can be done in the tab **Rental price difference** for **gross incomes** at the level **Income method**.

Example OVERRENTED RENT:

When you define the **rent per sqm**, define the **market rent** and not the **initial rent** of the tab **Gross income**.

In our example a value of € 6,-- is calculated as a market value per sqm notional and is defined for the period after the initial rent with the overrented rent for the remaining term lease in months.

The **overrented initial rent with a value of € 10,-- per sqm** is defined for a specific period of time (**over-rented rent**) in the tab **Rental price difference**. Mark the check box **Calculate the rent difference**. As **interest rate** usually the **interest rate is increased** by a **risk factor**.

The **rental price difference** is calculated as a **capitalized rental price difference** for the defined period of time. This means the **overrented capitalized rental price difference is added** to the **investment value**. In the case of an **underrented rent**, the capitalized rental price difference is **subtracted** from the **investment value**.

Tab Net income

In this tab the management and the maintenance costs are considered.

Capturing maintenance costs

With the button  you open the window **Edit value influencing factors**. Capturing can be done in the following two ways:

1. You can create a record manually with the button . Now you are in the tab **Detail**.

The following steps have to be done:

- In the tab **General** capture the basic data.
- In the tab **Description** capture texts of any length.
- Press the button  to save the data. All data are listed in **tabular form** in the dialog **Edit value influencing factors**.

2. You can also capture data with a wizard. To start the wizard, press the button . Predefined guidelines are available in the wizard. Select the **desired category** in the combo box. To activate a guideline, select it and press the  button. The value will be adopted in the tab **Detail** where you can edit it.

To confirm your data press the  button. All value influencing factors are shown in tabular form in the dialog **Edit Value influencing factors**.

You can capture and edit the guidelines in the **maintenance** (menu item: **Value influencing factors**).

Function of the buttons

	Press this button to confirm your data.
	Press this button to cancel capturing.
	Press this button to apply or discard your data.
	Press this button to close the dialog and the calculated value is shown in the appropriate field.

Context menu

You can open the context menu by selecting the **desired value influencing factor** at the level **Income method** and pressing the right mouse button.

	Press this button to duplicate a value influencing factor.
	Press this button to delete a value influencing factor.
	Press these buttons to change the order of the value influencing factors.

Capturing maintenance costs

You can enter the percentage of maintenance costs here.

The requirement is that you have associated a building in the tab **Associated buildings**.

Tab Associated buildings

You can associate buildings to the investment properties by marking a check box. **The following values will be adopted from the income value calculation:**

- Designation
- Year of construction
- Age
- Building value
- Captured building parts for the calculation of the gross income
- Reconstruction value for the calculation of the maintenance costs

Note:

- If you capture building parts according to the **fair value**, you have to note that no reconstruction value, no construction defects or structural damages are available.
- **The requirement for the associated buildings at the level Income method is an existing building at the level DRC value.**
- If there are several buildings available in the level **DRC value** you have to **capture an investment property for each building** for the calculation of the income value. The land value percentage **must not** be higher than 100 % for all assigned buildings.

Tab Income value

These types are available for the calculation of the income value:

- Income approach (standard)
- Income approach (simplified)
- Income value method (shortened)
- Income approach according to Koenig
- Discounted cash flow

Income approach (standard)

At the income approach the land value interest will be subtracted from the annual income value to get the net income of the building. The net income will be capitalized for the duration of the unexpired life. The land value interest will be capitalized as a perpetual annuity.

Normally the same interest rate is used for the land value and the building value ratio.

If you mark the check box **Negative value allowed** you can capitalize a negative income value for the liquidation value approach.

Share of land value

In this box capture the share of land value. Usually you have to enter the whole land value (100%) here.

For capturing press the button .

Note: If there are several buildings available at the level DRC value, you have to capture an investment property for each building for the calculation of the income value. The land value percentage **must not** be greater than 100 % for all assigned buildings.

Special case with very big lands

If a very big property is developed only on a small part of the land and if the undeveloped part could be evaluated separately, you must not capture the uncultivated part of the property in the income value calculation. In that case you have to capture just the share of the income value generating part in the input box **share of land value** (relevant for the land value interest). The part which generates no income value is calculated automatically and it is displayed as not considered real value in the income value calculation.

Depreciations

You can capture **deprecations** either manually or by pressing the button  (**requirement: associated buildings**). Therefore, you are able to make a difference between recoverable and uncoverable deprecations and subtract them.

Income approach (simplified)

This approach capitalizes the annual net income as a perpetual annuity.

By marking the check box **Negative value allowed** you can capitalize a negative income value for the liquidation value approach.

Income approach (shortened)

This approach capitalizes the annual net income on the remaining useful life of the building.

By marking the check box **Negative value allowed** you can capitalize a negative income value for the liquidation value approach.

Depreciations

You can capture **deprecations** either manually or by pressing the button  (**requirement: associated buildings**). Therefore, you are able to make a difference between recoverable and uncoverable deprecations and subtract them.

Income approach according to Koenig

This approach is another way to divide the annual net income in proportion of land and building value. First of all, the real value method is used and the real value is set to 100 %. This value is the basis for calculating the land and building values as percentages. The result is a bigger weighting of the building. These percentages are used to divide the annual net income into land and building value.

Note: For capitalizing you can use different interest rates for the proportion of land and building value.

Discounted cash flow

International investors often use the **discounted cash flow method** to decide whether to buy something or not. With this method you can display the effects of investments, possible rent increases or rent vacancy.

The value is a result of the discounted annual and periodic cash flows. With that value you calculate the present value. In the standard case the planning phase is **10 or 15 years** long.

The inflation and value increasing values are included in the present values which results in higher interest rates.

At the end of the explicit forecast period the sale of the property to the residual value is assumed. The forecast of the sale proceeds at the end of the planning period is based on the income excess (net income) of that period. The net income is capitalized as present value of a perpetual annuity and discounted by the forecast period. It is assumed that the net income value of the last period can be achieved sustainably. That means that the inflation and the value performance are not directly regarded in the cash flow series, but by the reduction of the interest rate.

This contrasts with the fact that the risk increases with the distance to the valuation date. So you have to use a higher capitalization interest rate.

The calculation of the residual value on the basis of the present value of a perpetual annuity can lead to incorrect results.

It is also possible to capitalize the residual value after the detail forecast phase on the basis of the annual net income of the last period on the not yet available remaining useful life.

Calculating the present value

Capture the explicit forecast period, the percentage and the management cost change per year in section **Phase I**. In section **Phase II** specifies the calculation type and the interest rate.



Press the button  in section **Present values** to generate a list. With the  button you can delete the calculation of the present value.



In the lower section **Phase II** define the annual gross income and the management costs. In section **Total** you can see the present values of phase I and II which result in the income value.

Changing values for calculating the present value

To consider values (gross income, maintenance costs and investments) for the calculation of the present value, press the right mouse button on the desired year in the dialog **Present values** and select the menu item **Edit**.

In the dialog **Discounted cash flow** you can capture changes for the selected and following year.

Changes can be done in the following two ways:

1. In the dialog of the elected year capture your changes for gross income, maintenance costs and / or investments. After that define the period of time for which the changes have to be adopted in the combo box **Year by**.

Note: The amount of investments is only valid for the currently selected year.

2. You can also define increases or decreases for the following year. capture the desired percentages in the section **Index increase** for that.

Note: Select the desired year in the field **Year to** in order to define the range of time for which the changes should be saved.

- To save the data, press the button  .
To discard the changes, press the button  .

Tab ESG

Look at [Tab ESG](#).

Tab Description

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Word processing

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

Comparison properties data

General

You can capture as many comparison objects for a valuation as you want. Therefore press the button



+

in the tab **Start / level Comparison property** or press the button  in the navigation at the level **Comparison properties**. Already captures comparison objects are listed in a tabular form. A click on a comparison object opens it for editing.

Function of the button



Add a comparison object.

Context menu

You can open the context menu by selecting the **desired comparison object** at the level **Comparison properties** and pressing the right mouse button.



Press this button to duplicate a comparison object.

	Press this button to delete a comparison object.
	Press these buttons to change the order of the comparison objects.

Tab Comparison property

Input boxes

Classification	Capture the classification of the comparison property in a list.
Designation	Capture the designation. You can save the description by pressing the  .
Year of construction	Capture the year of construction in a list.
Weighting	<p>Choose the weighting by selecting an entry in the dropdown box.</p> <p>At the level Overview / Tab Market value you can consider the comparison value in addition to the real value and the income value.</p> <p>You can use the weighting of the comparison value lonely for typical comparison objects (e.g. condominium, undeveloped real estates).</p> <p>You can also use the comparison value for typical real value objects and income value objects for plausibility. In this case the weighting has to be considered with the value 0. You also have to consider that you have to choose the entry "include" in the dropdown box Weighting.</p> <p>In some cases, (e.g. an object is evaluated by the income value, an undeveloped loft is considered with the comparison value) the comparison value is added usually to the real value and income value. The comparison value in this case is added to the weighted value. Note that you have to choose the entry "ignore" in the dropdown box Weighting when adding a comparison object.</p>

Tab Object parts

You can capture as many object parts as you want. Select the desired comparison property in the navigation of the level **Comparison properties**. Press the button  in the tab **Start** (group **Object part**) or the button  in the tab **Object parts**. Already captured object parts are listed in tabular form. A click on an object part opens it for editing.

Capturing object parts

Capturing of object parts can be done in the following two ways:

1. In the tab **Object parts** press the button  to capture an object part manually. Now the tab **Detail** is active. Capture the basic data.

To save the data, press the button  . All captured object parts are listed in tabular form.

2. Capturing also can be done by the **table input**.

Select the desired comparison property in the navigation at the level **Comparison properties** and activate the tab **Table input** in the tab **Comparison property**. Select the desired type in the list. Press the button  in the tab **Table input**.

Capturing can be done in tabular form with the **Tab key**.

To change an object part in the tab **Table input**, click on it. To delete an object part, select it in the tab **Table input** and press the **right mouse button** (action **Delete**) or press the **Del** key.

3. **Zoom-Out for detailed inputs**

When you press the button  you activate capturing in the **dialog mode**. This kind of capturing makes more space available if you use a small display or a display in the 16:9 formats.

Capturing data is equivalent to **1** and **2**.

Input boxes

Depending on the type (**Size**, **Cubic content**, **Flat value**, **Unit**) the following input fields are available:

Type	Capture the type of the object.
Designation	Capture the desired designation.
Unit	Capture the number and the type of the unit. New units can be created in the maintenance (menu item Units).
Gross area or dimension	Capture the gross area or dimension.
Reduction / net area	Capture the reduction of the net area. Note: Capturing the net area is done in the field Gross area . In this field no input is allowed.
Price per sqm	<p>Capture the price per sqm here.</p> <p>When you click on the button  the module Comparative price is opened. Note: This module is free for customers with active service contract. See further information at the manual Comparative price (Purchasing Price).</p> <p>By pressing the  button you can browse in published price indexes to check your market estimation. To accept the price, press the button Ok. With this procedure the link to the real estate price comparison list is created and the automatic revaluation can be started. If you have set a reverence price, the button  is ena-</p>

	bled. By pressing the button  and selecting the option  the price and the link is reset .
Comparison price	Capture the comparison price.

Function of the buttons

	Press this button to confirm your data.
	Press this button to cancel capturing.
	Press these buttons to apply or discard your data.

Context menu

You can open the context menu by selecting the **desired object part** at the level **Comparison properties** and pressing the right mouse button.

	Press this button to duplicate an object part.
	Press this button to delete an object part.
	Press these buttons to change the order of the object parts.

Tab Comparison value

In this tab you can capture value influencing factors for a comparison property.

Capturing value influencing factors

To capture an increase or a decrease, press the button .

There are two kinds of capturing value influencing factors:

1. You can capture them manually by pressing the button . Now you are in the tab **Detail**.

The following steps have to be done:

- In the tab **General** capture the basic data.
- In the tab **Description** capture texts of any length.
- Press the button  to save the data. All data are listed in **tabular form** in the dialog **Edit value influencing factors**.

2. You can also capture data with a wizard. To start the wizard, press the button . Predefined guidelines are available in the wizard. Select the **desired category** in the combo box. To activate

a guideline, select it and press the  button. The value will be adopted in the tab **Detail** where you can edit it.

To confirm your data press the  button. All value influencing factors are shown in tabular form in the dialog **Edit Value influencing factors**.

You can capture and edit the guidelines in the **maintenance** (menu item: **Value influencing factors**).

Function of the buttons

	Press this button to confirm your data.
	Press this button to cancel capturing.
	Press this button to apply or discard your data.
	You can close the window Value influencing factors with this button. The sum of the increases or decreases will be adopted.

Context menu

You can open the context menu by selecting the **desired value influencing factor** in the dialog **Edit value influencing factory** and pressing the right mouse button.

	Press this button to duplicate a value influencing factor.
	Press this button to delete a value influencing factor.
	Press these buttons to change the order of the value influencing factors.

Tab ESG

Look at [Tab ESG](#).

Tab Description

With the integrated word processing you can capture texts of any length. You can also insert text modules, texts, images, externals files, tables, macros and much more here. You find the formatting bar on the upper side of the window.

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.

Rights in rem

General



You can capture as many rights in rem as you want. To capture a right in rem, press the button in the toolbar **Start** and select **Rights in rem** or the button at the level **Rights in rem**. Already captured rights in rem are listed in tabular form.

You can open the required right in rem with a **click**.

Function of the button



Press this button to **capture** a right in rem.

Context menu

You can open the context menu by selecting the **desired right in rem** at the level **Rights in rem** and pressing the right mouse button.

	Press this button to duplicate a right in rem.
	Press this button to delete an right in rem.
	Press these buttons to change the order of the rights in rem.

Types of rights in rem

Perpetual annuity

The **present value** of a **perpetual annuity** can be captured very easily and quickly. Just capture the key data at the tab **General**. At the tab **Description** you can capture a description with the internal word processing. You can insert text modules, texts, images, externals files, tables, macros and much more here. You find the formatting bar on the upper side of the window.

Temporary annuity

The **present value** of a **temporary annuity** can be captured very easily and quickly. To capture a temporary annuity capture the key data at the tab **General**. At the tab **Description** you can capture a description with the internal word processing. You can insert text modules, texts, images, externals files, tables, macros and much more here. You find the formatting bar on the upper side of the window.

Building right

To capture a building right, capture the plot number, the land size and the price per sqm in the tab **General**. A foreign-owned property must be evaluated with the comparative method. After the input of a **commercial interest rate** the annual building right interest rate is calculated.

On the basis of the actual interest rate a supererogation or an underachievement is calculated.

The annual advantage or disadvantage is capitalized as a present value on the remaining term of the building right contract. The present value is assumed as notional land value (positive or negative) in the market value calculation.

In the tab **Description** you can capture a description with the internal word processing. You can insert text modules, texts, images, externals files, tables, macros and much more here. You find the formatting bar on the upper side of the window.

Others

You can capture other rights here. In the tab **Description** you can capture a description with the internal word processing. You can insert text modules, texts, images, externals files, tables, macros and much more here. You find the formatting bar on the upper side of the window.

Encumbrances

General

You can capture as many encumbrances as you want. To capture an encumbrance, press the button



in the toolbar **Start** and select **Encumbrances** or the button in the navigation in the level **Encumbrances**. Already captured encumbrances are listed in **tabular form**.

You can open the required encumbrance with a **click**.

Function of the button

	Add a new encumbrance.
--	------------------------

Context menu

You can open the context menu by selecting the **desired encumbrance** at the level **Encumbrances** and pressing the right mouse button.

	Press this button to duplicate an encumbrance.
	Press this button to delete a new encumbrance.
	Press these buttons to change the order of the encumbrances.

Types of encumbrances

Lifetime encumbrance

To capture a **lifetime encumbrance** enter the key data in the tab **General**.

Is the value of the lifetime encumbrance secured you have to capture the present value of the annuity. If there is no value security, you have to capture a higher interest rate (**e.g. + 2 %**).

In the tab **Description** you can capture a description with the internal word processing. You can insert text modules, texts, images, externals files, tables, macros and much more here. You find the formatting bar on the upper side of the window.

Life estate

The right of abode (life estate) is a **personal easement**, at which the beneficiary is allowed to use a part of a building for residential usage. **This right ends with the death of the beneficiary.**

If there are two persons, you have to use the **younger person**.

At single family houses and small multi-party homes which are encumbered with a right of abode (life estate) you have to make a **reduction because of reduced sale ability**, especially if there is no owner's apartment.

You have to capitalize the notional monthly rent – eventually increased by the service charges paid by the owner - as present value.

The interest rate should be the same like in the calculation of the income value.
A temporary life estate is capitalized as a temporary annuity.

In the tab **Description** you can enter a description with the internal word processing. You can insert text modules, texts, images, externals files, tables, macros and much more here. You find the formatting bar on the upper side of the window.

Calculating a notional rent

To calculate a notional rent, press the button  next the input box **Annuity (notional)**.

Perpetual annuity

You can capture a perpetual annuity here. You just have to enter the key data at the tab **General**. At the tab **Description** you can enter a description with the internal word processing. You can insert text modules, texts, images, externals files, tables, macros and much more here. You find the formatting bar on the upper side of the window.

Temporary annuity

You can capture a temporary annuity here. You just have to enter the key data at the tab **General**. At the tab **Description** you can capture a description with the internal word processing. You can insert text modules, texts, images, externals files, tables, macros and much more here. You find the formatting bar on the upper side of the window.

Care

You can calculate care expenses (already occurred or not occurred) here.

- If the nursing case hasn't occurred yet, you have to consider a care possibility based on the care level 3. The check box **Calculation with care-probability** has to be marked.
- If the nursing case has occurred yet, you can choose a care level and an hourly rate. The check box **Calculation with care-probability** has not to be marked

At the tab **Description** you can enter a description with the internal word processing. You can insert text modules, texts, images, externals files, tables, macros and much more here. You find the formatting bar on the upper side of the window.

Building right

A building right allows you to develop a plot, which is in foreign ownership.

To capture a building right enter the plot number, the land size and the price per sqm in the tab 'General'. The foreign-owned property must be evaluated with the comparative method. After the input of a **commercial interest rate** the annual building right interest rate is calculated.

On the basis of the actual interest rate a supererogation or an underachievement is calculated.

The annual advantage or disadvantage is capitalized as a present value on the remaining term of the building right contract. The present value is assumed as a notional land value (positive or negative) in the market value calculation.

In the tab **Description** you can enter a description with the internal word processing. You can insert text modules, texts, images, externals files, tables, macros and much more here. You find the formatting bar on the upper side of the window.

Others

You can capture other rights here. In the tab **Description** you can enter a description with the internal word processing. You can insert text modules, texts, images, externals files, tables, macros and much more here. You find the formatting bar on the upper side of the window.

Overview

Tab Real value

You get an overview of the captured real value in this tab. Additionally you can capture out-door facilities, decreases and increases for the real value.

Button - Value influencing factors

Press this button to capture value influencing factors like

- **Out-door facilities**
- **Decrease (real value)**
- **Increase (real value)**

Capturing value influencing factors

Press the button  to open the dialog **Edit value influencing factors**. Capturing can be done in the following two ways:

1. You can create a value influencing factor **manually** by pressing the button . Now you are in the tab **Detail**.

The following steps have to be done:

- In the tab **Detail** capture the basic data.
- In the tab **Description** you can capture texts of any length.
- Press the button  to save the data. All data are listed in **tabular form** in the dialog **Edit value influencing factors**.

2. You can also capture data with a wizard. To start the wizard, press the button . Predefined guidelines are available in the wizard. Select the **desired category** in the combo box. To activate a guideline, select it and press the  button. The value will be adopted in the tab **Detail** where you can edit it.

To confirm your data press the  button. All value influencing factors are shown in tabular form in the dialog **Edit Value influencing factors**.

You can capture and edit the guidelines in the **maintenance** (menu item: **Value influencing factors**).

Function of the buttons

	Press this button to confirm your data.
---	--

	Press this button to cancel capturing.
	Press this button to apply or discard your data.
	Press this button to close the dialog and the calculated value is shown in the appropriate field.

Context menu

You can open the context menu by pressing the right mouse button on the required entry.

	Press this button to duplicate a value influencing data.
	Press this button to delete a value influencing data.
	Press this buttons to change the order of the value influencing data.

Tab Income value

You get an overview of the captured **income values** here. A not relevant land value is shown as unconsidered land value. You can also capture **increases** or **decreases** to the income value.

Button - Value influencing factors

Press this button to capture value influencing factors like

- **Decrease (income value)**
- **Increase (income value)**

Capturing value influencing factors

Press the button  to open the dialog **Edit value influencing factors**. Capturing can be done in the following two ways:

1. You can create a value influencing factor **manually** by pressing the button . Now you are in the tab **Detail**.

The following steps have to be done:

- In the tab **Detail** capture the basic data.
- In the tab **Description** you can capture texts of any length.
- Press the button  to save the data. All data are listed in **tabular form** in the dialog **Edit value influencing factors**.

2. You can also capture data with a wizard. To start the wizard, press the button . Predefined guidelines are available in the wizard. Select the **desired category** in the combo box. To activate

a guideline, select it and press the  button. The value will be adopted in the tab **Detail** where you can edit it.

To confirm your data press the  button. All value influencing factors are shown in tabular form in the dialog **Edit Value influencing factors**.

You can capture and edit the guidelines in the **maintenance** (menu item: **Value influencing factors**).

Function of the buttons

	Press this button to confirm your data.
	Press this button to cancel capturing.
	Press this button to apply or discard all your data.
	Press this button to close the dialog and the calculated value is shown in the appropriate field.

Context menu

You can open the context menu by selecting the **desired value influencing data** in the dialog **Edit value influencing data** and pressing the right mouse button.

	Press this button to duplicate a value influencing data.
	Press this button to delete a value influencing data.
	Press these buttons you can change the order of value influencing data.

Tab Comparison value

You get an **overview** of the results of the values of the weighted or not weighted comparison objects. If the comparison object **is weighted or not**, can be defined by the dropdown box **Weighting** at the level **Comparison objects data**. Furthermore, value influencing factor for the comparison value can be captured.

Button - Value influencing factors

Press this button to capture value influencing factors like

- Decrease in value weighted
- Increase in value weighted
- Decrease in value unweighted
- Increase in value unweighted

Capturing value influencing factors

Press the button  to open the dialog **Edit value influencing factors**. Capturing can be done in the following two ways:

1. You can create a value influencing factor **manually** by pressing the button . Now you are in the tab **Detail**.

The following steps have to be done:

- In the tab **Detail** capture the basic data.
- In the tab **Description** you can capture texts of any length.
- Press the button  to save the data. All data are listed in **tabular form** in the dialog **Edit value influencing factors**.

2. You can also capture data with a wizard. To start the wizard, press the button . Predefined guidelines are available in the wizard. Select the **desired category** in the combo box. To activate a guideline, select it and press the  button. The value will be adopted in the tab **Detail** where you can edit it.

To confirm your data press the  button. All value influencing factors are shown in tabular form in the dialog **Edit Value influencing factors**.

You can capture and edit the guidelines in the **maintenance** (menu item: **Value influencing factors**).

The function of the buttons

	Press this button to confirm your data.
	Press this button to cancel capturing.
	Press this button you can apply or discard all your data.
	Press this button to close the dialog and the calculated value is shown in the appropriate field.

Context menu

You can open the context menu by selecting the **desired value influencing data** in the dialog **Edit value influencing data** and pressing the right mouse button.

	Press this button to duplicate a value influencing factor.
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	Press this button to delete a value influencing data.
	Press these buttons to change the order of the value influencing data.

Tab Market value

You get an overview of the results of the calculation of the real value and comparison value. You can also capture increases or decreases for the comparison value.

Important information about the break-up value:

Liquidation value (also: liquidation proceeds, break-up value) is in the economy **the proceeds** that can be achieved **in the dissolution or liquidation of companies** through the **sale of all assets**.

The **rounded market value** is used as the basis for the calculation, the break-up value is taken into account as a **percentage**.

Important: In the case of a **Ten2Click rating taken from the portal**, the break-up value can only be adapted later by the **Administrator or Manager role**.

Button - Value influencing factors

Press this button to capture value influencing factors like

- Decrease in value
- Increase in value

Capturing value influencing factors

Press the button  to open the dialog **Edit value influencing factors**. Capturing can be done in the following two ways:

1. You can create a value influencing factor **manually** by pressing the button . Now you are in the tab **Detail**.

The following steps have to be done:

- In the tab **Detail** capture the basic data.
- In the tab **Description** you can capture texts of any length.
- Press the button  to save the data. All data are listed in **tabular form** in the dialog **Edit value influencing factors**.

2. You can also capture data with a wizard. To start the wizard, press the button . Predefined guidelines are available in the wizard. Select the **desired category** in the combo box. To activate

a guideline, select it and press the  button. The value will be adopted in the tab **Detail** where you can edit it.

To confirm your data press the  button. All value influencing factors are shown in tabular form in the dialog **Edit Value influencing factors**.

You can capture and edit the guidelines in the **maintenance** (menu item: **Value influencing factors**).

The function of the buttons

	Press this button to confirm your data.
	Press this button to cancel capturing.
	Press this button to apply or discard all your data.
	Press this button to close the dialog and the calculated value is shown in the appropriate field.

Context menu

You can open the context menu by selecting the **desired value influencing data** in the dialog **Edit value influencing data** and pressing the right mouse button.

	Press this button to duplicate a value influencing factor.
	Press this button to delete a value influence factor.
	Press these buttons to change the order of the value influence factor.

Input boxes

Weighting Real value / Income value / Comparison value	<p>Capture the weighting here. You can also consider the comparison value in addition to the real value and income value when weighting.</p> <p>If you use several values when evaluating a real estate you have to consider the proportions in the fair trading. If necessary, the expert has to evaluate the market by several values.</p> <ul style="list-style-type: none"> • Market value is evaluated only by the real value: Real value 1 / Income value 0 / Comparison value 0 • Market value is evaluated only by the income value: Real value 0 / Income value 1 / Comparison value 0 • Market value is evaluated only by the comparison value: Real value 0 / Income value 0 / Comparison value 1
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	<p>You can use the weighting of the comparison value lonely for typical comparison objects (e.g. condominium, undeveloped real estates).</p> <p>You can also use the comparison value for typical real value objects and income value objects for plausibility. In this case the weighting has to be considered with the value 0. You also have to consider that you have to choose the entry "include" in the dropdown box Weighting at the level Comparison objects data.</p> <p>In some cases, (e.g. an object is evaluated by the income value, an undeveloped loft is considered with the comparison value) the comparison value is added usually to the real value and income value. The comparison value in this case is added to the weighted value. Note that you have to choose the entry "ignore" in the dropdown box Weighting at the level Comparison objects data when adding a comparison object.</p>
Market value encumbered / unencumbered	You can show or hide the encumbered or unencumbered market value by the button  .
Shares	Enter the ownership share here. If the whole property is evaluated, you have to enter the value 1/1 . If only half of the property is evaluated, you have to enter the value 1/2 .
Market value rounded to	Define the rounding here.
Lending value (internal)	<p>Enter the internal lending value here. This input box is only visible if it's activated at the user in the maintenance (Menu item: 'User management' > Tab 'General' > Combo box 'Program' > Option 'Lending and cover valuation after encumbrances' or 'Lending value and marginal return calculation').</p> <p>By pressing the  button you can access the predefined guidelines. To accept a lending value in the dialog Lending value (internal), mark the desired lending value and press the button .</p> <p>New lending values can be entered in the maintenance / Lending value.</p>
Solvency (Market value)	<p>Enter the percentage of the solvability here.</p> <p>If it is a pure residential property, enter 100 % here. At mixed used objects you have to enter the percentage of the residential usage.</p>
Lending value	Enter the lending value according to the solvability here.

Tab Conclusion

With the integrated word processing you can capture texts of any length. You can also insert text modules, texts, images, externals files, tables, macros and much more here. You find the formatting bar on the upper side of the window.

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.

Tab Notes

In this tab you can enter notes with the internal word processing. You can insert text modules, texts, images, externals files, tables, macros and much more here. You find the formatting bar on the upper side of the window.

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.

Tab Benchmarks

To validate the market value **benchmarks** are often used. The calculation of the benchmarks is done in the tab **Benchmarks**.

Note: This tab is located at the level **Overview** or at the level **Valuations** when the **valuation is locked**.

For the calculation of the benchmarks **Purchase price per sqm. usable floor area**, **Purchase price difference to market value** and **Purchase price difference to market value in %**, the purchase price and the **transaction date** have to be given at the level **Valuations**.

Note: These benchmarks are available as **macros (placeholders)** for printing as well as for **word processing (text modules)**.

Input boxes

Usable area (total)	Some important benchmarks are based on the usable area (e.g. market value per sq.m. usable floor area, purchase price per sq.m. usable floor area etc.). The information for the total usable area is usually not available as information in the valuation, it must be entered in the Usable area (total) input field . To support the input, the suggested value can be loaded from the DRC value or income value calculation using the button  to the right of the Usable area (total) input field .
Total vacancy area	The information for the total vacancy area is usually not available as information in the valuation, it must be entered in the Total vacancy area input field . To support the input, the suggested value can be loaded from the income value calculation using the button  to the right of the Total vacancy area input field .
Date completion	The date after completion can be entered here.

Value at completion	<p>The value at completion is to be entered here. The suggested value (= market value) can be loaded by using the button  to the right of the Value at completion input field. This can also be adapted as required.</p> <p>Note: If no value was entered in this input field, the determined market value is automatically loaded when the macro is used in word processing. Otherwise the recorded value.</p>
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Important - applies to all of the above-mentioned input fields: By marking the entered value and pressing the **Entf-key**, your input can be deleted.

Comment

Source: 100 Immobilienkennzahlen, 2. Auflage 2010, Autor Tobias Schultheiß

BENCHMARK Market value per sqm. usable floor area

Formula: Market value / Usable area (total) / 12

Comment: This is the average market value per sqm usable floor area per month.

BENCHMARK Gross income per sqm. per month

Formula: Gross income / Usable area (total) / 12

Comment: This is the average rent per sqm usable floor area per month. With this benchmark you can see if the rent is under- or over rented.

BENCHMARK Vacancy rate (Gross income) in % and Vacancy rate (area) in %

Formula: (Vacancy rate / Annual net income (Balance)) * 100 %

Comment: The vacancy rate by definition is the portion of the vacancy at the specific time in relation to the annual net income. Either the annual balance income or the total area can be used as a benchmark. In practice the balance income is used because income is more important than the real value. To calculate the balance income the available areas are calculated by the market conditions and the rent is added. **If you want to calculate the vacancy rate by the floor area this benchmark is calculated as follows:**

(Not rented area / Total usable floor area) x 100 %

Advantages:

- Shows the attractivity of a real estate
- Important indicator for an investment decision
- Very relevant for practice and easy to calculate

Disadvantages:

- Different estimations of market conditions lead to different results by different estimators

- Manipulation by the use of too high rents
- Benchmark is no prediction about the quality of the areas

BENCHMARK Gross initial yield (%)

Formula: $(\text{Annual net income (Actual)} / \text{Net purchase price} \times 100\%)$

Comment: The gross initial yield is the only yield benchmark because the rent is set in relation to the purchase price. The contract is to be considered. Extraordinary income decreases or increases are not considered. The gross multiplier is the inverse. It is the multiple of an annual gross income to calculate the purchase price.

Advantages:

- Very relevant for practice and easy to calculate
- Is the only and effective definition of a rent because there are no subjective assumptions
- Indicator if the price of a real estate is too high or too cheap in comparison to another real estate
- Can be used as an indicator for the trend of prices

Disadvantages:

- Little explanatory power if no further information about renting situation and maintenance exist
- Increase potentials of rents are disregarded
- Statistical benchmark referenced to a valuation date

BENCHMARK Net initial yield (%)

Formula: $(\text{Annual net income (Actual)} - \text{not contributable maintenance costs} / \text{Net purchase price}) \times 100\%$

Comment: The net initial yield is an extension of the gross income yield by consideration of the not contributable working costs. Extraordinary income decreases or increases are not considered. In practice mostly the gross income yield is used for analysis.

Note: The additional income costs are not considered by the calculation of the net income yield because they can't be integrated in the application.

Advantages:

- Very relevant for practice and easy to calculate
- Indicator if the price of a real estate is too high or too cheap in comparison to another real estate
- Can be used as an indicator for the trend of prices

Disadvantages:

- Little explanatory power if no further information about renting situation and maintenance exist
- Increase potentials of rents are disregarded
- Statistical benchmark referenced to a valuation date

BENCHMARK Gross income multiplier

Formula: $(\text{Net purchase price} / \text{Annual net income (Actual)})$

Comment: As an inverse of the gross income yield this benchmark is the simplest form of a multiplier because it only calculates the quotient of the purchase price to the annual rent. The contract is to be considered. Extraordinary income decreases or increases are not considered.

Advantages:

- Very relevant for practice and easy to calculate
- Is the only and effective definition of a rent because there are no subjective assumptions
- Indicator if the price of a real estate is too high or too cheap in comparison to another real estate
- Can be used as an indicator for the trend of prices

Disadvantages:

- Little explanatory power if no further information about renting situation and maintenance exist
- Increase potentials of rents are disregarded
- Statistical benchmark referenced to a valuation date

BENCHMARK Net income multiplier

Formula: Net purchase price / ((Annual net income (Actual) – Not contributable maintenance costs)

Comment: As an inverse of the net income yield this benchmark is the simplest form of a multiplier because it only calculates the quotient of the purchase price to the annual net income subtracted by the not contributable maintenance costs. Extraordinary income decreases or increases are not considered.

The net multiplier is also an extension of the gross multiplier to consider the not contributable maintenance costs.

Note: The additional income costs are not considered by the calculation of the net income yield because they can't be integrated in the application.

Advantages:

- Very relevant for practice and easy to calculate
- Indicator if the price of a real estate is too high or too cheap in comparison to another real estate
- Can be used as an indicator for the trend of prices

Disadvantages:

- Little explanatory power if no further information about renting situation and maintenance exist
- Increase potentials of rents are disregarded
- Marginal significant benchmark for real estate development
- Statistical benchmark referenced to a valuation date

BENCHMARK Purchase price per sqm. usable floor area

Formula: Purchase price / Usable area (total)

BENCHMARK Purchase price difference to market value

Formula: Compare market value with purchase price

BENCHMARK Purchase price difference to market value in %

Formula: Compare market value with purchase price in %

BENCHMARK Market value after completion

Formula: Market value with 100 % degree of completion

Comment: Display of the market value assuming that all degrees of completion were at 100 % by the reporting date.

Example:

Market value on the reporting date: 150,000.00 (= normal market value; the building is 80 % completed)

Market value after completion: 195,000.00 (100 % completion is assumed - only for this calculation)

Output of benchmarks (macros)

You can add **macros for the benchmarks** in the **word processing**. A list of available macros is shown in the [macro list](#) or if the **program** is started in the **word processing** in the **button bar** in the group **Insert**

by clicking on the button  . In the dialog **Insert macro... / Category Valuation** you have to mark the desired macro **[BM...]** and **accept** it by clicking on the button **Insert**.

Note: The check box **Insert macro as field** has to be **activated** so that the macro always is actualized.

Tipp: If you plan to insert several benchmarks at once, you should [define a text module](#) in the maintenance. This text module can be inserted in the word processing.

Macro list

The following benchmark macros are available in the word processing:

Valuation	
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]

Output



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**.

Print options

Printing style	Select a printing style here. <ul style="list-style-type: none"> • 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 with frames. • 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.
Header and footer	Select the desired template for a cover sheet. The selected cover sheet contains the header and the footer . An instruction how to create a cover sheet you find here .
Style sheet	Define a style sheet for the valuation report (Header 1 – 5, Normal = Text) are predefined combinations of fonts, colours and paragraphs. These styles sheets should help you to save time. Style Sheets can be created and maintained in the maintenance / Style sheets .

	Note: The selected style sheet is used in the valuation report.
Numbering	You can define the type of numbering (number, upper case, lower case etc.) if the automatic creation of the contents is selected.
	Define the complexity of the output here. All the selected options will be printed. The valuation report is output without encumbrances and rights in rem if the check box Ignore encumbrances and rights in rem are not marked.
Print options	In a valuation report there are several ways to print images. Depending on the number of images you can two or more images on one page (Standard). <ul style="list-style-type: none"> • Standard In this case an image is printed with its description. • Two or more images per page In this case the images are printed first and then the descriptions. You can print documents that have been added to the valuation in the tab Documents at the level Valuations when you press the button  . Select the desired documents in the dialog Select documents and press the button  . Note: When you export a document only a PDF is created. Exporting to Word is not supported .
	To output information of the automatic revaluation, activate the check box Include information of automatic revaluation . Note that valuations at which the history of the automatic revaluation is already included in the conclusion, output the conclusion twice if this check box is marked. In this case deactivate the check box.
Other options	<p>Check box Overview This option is only available at the printing style Valuation report.</p> <p>Check box Print leading information This option is only available at the printing style Compact.</p> <p>Check box Index of Contents With this option you can structure the report in the way you want. This is a possibility to structure the contents in a more flexible way.</p>

Information about the index of contents

Style sheets (Header 1 – 5, Normal = Text) must be available to create an index of contents. They are installed by default and are needed when you export a valuation report.

Refreshing the index of contents

If you have added or deleted headers or other entries in the document, you can refresh the index of contents quickly.

- Click on the tab **Reference** in the group **Contents** on Refresh directory.
- Click **Update page numbers only** or **Update entire directory**.

Text modules with a structure

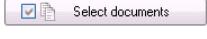
If text modules should be structured, the style sheet (Header 1 – 5, Normal = Text) have to be used when creating or maintaining a text module.

In the maintenance you can create and maintain text modules by selecting **Text modules**.

Output types

Export

By pressing the button **Export** you can **save the valuation report** in the file formats ***.docx**, ***.doc** or ***.pdf**.

Note: If you press the button  and select the desired documents in the dialog **Select documents**, only a PDF is created. **Exporting to Word is not supported.**

If you select the file format (***.docx** or ***.doc**) and capturing of a file name in a directory, the value report is edited in Word and **can be changed** there.

If you select the file format Adobe PDF (***.pdf**) and choose a file name in a directory, the valuation report is edited in **Acrobat Reader** and **can't be changed** there.

Preview

By pressing the button **Preview** you can open the preview of the valuation report. You can see a preview of the valuation and print it on your standard printer.

Print

By pressing the button **Print** you can open the print dialog. In this dialog you can define the printer.

Close

With this button you can **close** the print dialog.

Maintenance

Settings

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



(upper left corner) / button 

You can start the maintenance with a click on the button  as well



as by pressing the button  in the tab **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.

Backup database / Restore database

In the maintenance dialog an administrator can backup and restore the database in the menu **Tools / Backup database** or **Restore database**.

Backup database

We recommend to backup database **periodically**. The following steps have to be done:

- The database has to be closed. Therefore, choose **File / Logout** in the maintenance dialog.
- Start the action **Tools / Backup database**.
- The database is saved to the **backup directory** of the SQL Server. A click on the icon  in the lower right corner of the maintenance dialog opens this directory in an explorer dialog.
- Pressing the button **Backup** starts the backup process. The message "**Database successfully backed up!**" is shown if the backup was successful.

Restore database

To restore the database select **Tools / Restore database** in the maintenance dialog and perform the following steps:

- The database has to be closed. Therefore, choose **File / Logout** in the maintenance dialog.
- Start the action **Tools / Restore database**.
- The dialog **Maintenance** and the program that you can see in the background have to close by pressing the button . The only dialog that may be opened is the dialog **Restore database**.
- Press the button  to select the backup file of the database.
- Press the button **Restore**.

Note: You need the right to write data to the source directory.

- If the restore was successful, the message “**Database successfully restored!**” is shown.

Frequently error: The exclusive access to the database is not possible, because database is already in use. **RESTORE DATABASE** is terminated.

Solution:

- The dialog **Maintenance** and the program that you can see in the background have to close by pressing the button . The only dialog that may be opened is the dialog **Restore database**.

Section System settings

Tab Settings

Group System administrator

Note: These settings can only be changed by the system administrator. For all other user the settings are inactive or not visible. Detailed information you find in the section **User management**.

The system administrator can define the following options:

- Maximum image or document size

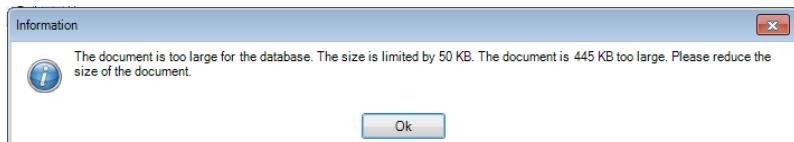
When importing an image or a document in the navigation at the level **Valuations / tab Images or Documents**, automatically a sizing is performed. Per default a value of 256 Kb is defined. You can define a value that fits for your need. If you enter a value of 0 Kb, the value is automatically set to the default value of 256 Kb.

Limiting the size of an image:

When adding an image the size of the image is scaled to the value entered in this field. This relates to images in the tab **Images** on the level of **Valuations** and for all tabs **Descriptions** and for the tab **Findings**.

Limiting the size of a document:

Importing a document in the tab **Documents** at the level **Valuations** that is bigger in size than the value entered in this field results in an appropriate message. Checking the size of a document is not done at the tabs **Descriptions** or the tab **Findings**.



- Maximum result set (number of lines by queries)

This setting defines the number of lines at the level **Search**. This setting is also valid for the module **confirmation workflow**.

- Check parallel transactions

The program **Real Estate Valuation** is not designed to allow several users on a single valuation. If several users try to do so, this setting defines the behaviour of the program.

The client, the properties and the valuations are seen as a whole unit. If a valuation is changed, the client and his total commitments are changed.

You have the choice between two options:

Option 1: Check box is marked

This means that the data area stored for the user who stores the data **first**. From that point of time no data can be stored from other users when the client is opened by that user.

Example:

Two users are working on the same **client** at the same time. The first user presses the button **Save**. The second user receives the following message when pressing the button Save:



Option 2: Check box is not marked

This means that the data area stored for the user who stores the data **last**. Even if several user store data at the same time each user can store the data and each change is stored.

Note: In this case it is not guaranteed that data are up to date.

Group General

Note: These settings can only be changed by the **system administrator**. For all other user's part is inactive or not visible. You can find details in the category **User maintenance**.

Automatic log in (automatic user creation)	If this option is not set the automatic log in of a user is not possible. Per default this option is set.
New valuation is 'active'	If this option is set a new or duplicated valuation automatically gets the status active . This option is also available for the modules Automatic revaluation and Automatic data transformation .
Use Basel II wizard generally	If this option is set the Basel II wizard is used instead of the default wizard . Press the button  or  to start the Basel II wizard .
Valuations created with the wizard are blocked in the professional edition	If this option is set, valuations which were created with the wizard are blocked in the program. That means that this valuation can't be edited in the program.
Force district court/land registry selection (if available for selected nation)	If this option is set you can only capturing of the district court and the land registry is regulated. Capturing freely is not allowed. The district court and the land registry have to be selected from a list. Note: The list is only available if data exist for the selected nation (per default only for Austria).
Ignore details of the real estate price comparison lists	If this option is set the assigned real estate price comparison list is not printed.
Economic entity – Top enabled	If this option is set the input field Economic entity is active for properties and an economic entity can be de-

	fined. Note: This input field is only active for all property types with activated option View property interests (section Categories).
Show gross yield	If this option is set the gross yield in percent is shown in the Overview / tab Market value .
Browser	Define the browser with which the Sprengnetter web services (Property rating, Comparison properties etc.) should be started. Note: If you have troubles with the defined browser, choose the other one.

Group Confirmation workflow

Note: These settings are also visible for users with the role **Admin**.

Lock automatic confirmed valuations	If you license the additional module Confirmation workflow all existing valuations are automatically confirmed. The valuations can't be changed and deleted from this point of time. To change the valuation and to set it to the status unconfirmed deactivate this option.
Check or clear valuation status	Press the button Clean status... to check or clear the status of confirmed valuations. Manually confirmed valuations with the status active are validated and if necessary cleared by setting the status to automatic confirmed . Note: This process can't be reversed.

Group Automatic revaluation

Note: These settings are also available for users with the role **Admin**.

Restrict display/editing of pools to owners/creators	If this check box is marked each administrator only can see his own pools in the module automatic revaluation . If this check box is not marked an administrator gets access to pools of other administrators.
---	--

Group Plugins

Note: These settings are also available for users with the role **Admin**.

If the check boxes are marked then a check on multiple records is done. You can also select a record and change the data.

Example: Double client numbers, double cadastral numbers etc.

Function of the button

Save	Press this button to save the changed settings. Note: This setting only gets active when
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you close and restart the program.

Tab User

Valuations can be transferred from a user (Source) to another user. **The following steps have to be done:**

- Search for a user by filter criteria (name or login name). Press the button .
- In the left group **Source** select the user from which the valuations should be transferred from. In the group **Target** select the user to whom the valuations should be transferred.
- To start transferring the data, press the button . If the transfer was successful the message **X valuations have been successfully transferred** is shown.

Tab Keywords

You can define keywords that can be assigned to a real estate or a valuation. Assigning is done at level Properties for a property and at the level Valuations for a valuation. They can be used to search for properties in the program **Real Estate Valuation** or in the module **Management information** that

- are contaminated,
- are owned by you,
- are referenced by a building right,
- are used for private or business purposes,
- have an energy performance certificate,
- have been added for internal purposes,
- have been added as a template.

Select the desired category and define keywords in the dialog **Keywords**. To save the keywords, press the button **Save**.

Tab Proxy

You can maintain the settings for the **proxy**. If you have questions contact our technical support (support@sprengnetter.at).

Tab Culture

You can define the **format of numbers** and **dates**.

Note: Per default the currently default formats are defined. Changes should be done carefully.

Function of the button

Save	Saves your settings. Note: The settings come into effect after a restart of the program.
-------------	---

Section 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 Confirmation workflow, Automatic revaluation and Plugins are active.

To assign **administrator rights** to a role, open the **desired user** by pressing the button  and double-clicking on it in the Section **User management**. In the dialog **Employee / Users / Tab Login** under

Available Roles, select the **Admin** entry. The button  transfers it to the **Assigned Roles** group.
Note: Only one role should be assigned in the **Assigned Roles** group.

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.

To assign **manager rights** to a role, open the **desired user** by pressing the button  and double-clicking on it in the Section **User management**. In the dialog **Employee / Users / Tab Login** under **Available Roles**, select the **Manager** entry. The button  transfers it to the **Assigned Roles** group.
Note: Only one role should be assigned in the **Assigned Roles** group.

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.

To assign **user rights** to a role, open the **desired user** by pressing the button  and double-clicking on it in the Section **User management**. In the dialog **Employee / Users / Tab Login** under **Available Roles**, select the **User** entry. The button  transfers it to the **Assigned Roles** group. **Note:** Only one role should be assigned in the **Assigned Roles** group.

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.

To assign **auditor rights** to a role, open the **desired user** by pressing the button  and double-clicking on it in the Section **User management**. In the dialog **Employee / Users / Tab Login** under **Available Roles**, select the **Auditor** entry. The button  transfers it to the **Assigned Roles** group. **Note:** Only one role should be assigned in the **Assigned Roles** group.

Input fields

Tab Login

The roles are assigned here.

User	Enter your first and last name . This value is printed in the valuation report.
Windows user	The value of this field is automatically defined.
User name	Define your user name .
Password	Define the password .
Repeat password	Enter the defined password again.

Tab General

Define the **user's contact information**. This data is printed out at the beginning of the valuation report.
Note: This data is also available as macros (**placeholders**). You can integrate these macros in the cover page as well as in the headers and footers.

Classification	Define the type of the classification of the user .
Telephone	Enter the user's telephone number .
E-Mail	Enter the user's email address .
Institute	Enter institute or company data .
Address	Enter the institute or company address .
Program	<p>Define the type of the program.</p> <ul style="list-style-type: none"> • Valuation: If you add a valuation report as a private person, select this entry. • Lending value and marginal return calculation: If you add a valuation report as a bank and want to report the internal lending value, select this entry. <p>Note that the encumbrances are considered by the calculation of the market value.</p>

Tab Sprengnetter account

You can maintain the **Sprengnetter account of the logged in user**. You can register yourself or define the login data of your existing Sprengnetter account. The other way to define it is to open the maintenance and in the **user management** you can define it in the tab **Sprengnetter account**. Note: For each user can define an **own Sprengnetter account**.

To register click on the button 

Note: Registering in the **Sprengnetter Shop** is free and with your account you can **log in to all services of Sprengnetter** you purchased.

If you have an **Sprengnetter account**, enter your **login data**. To **save your account data** click on the button .

Note: With your login data you automatically are logged in your Sprengnetter services (e. g. ImMaRate etc.).

Example [ImMaRate](#): Add highly qualified reports of the district in the valuation



Clicking on this button opens the **Sprengnetter Shop**.

Context menu

In the section **User management** select an existing user und press the **right mouse button** to open the context menu.

	Open an already existing user.
	Add a user.
	Delete an existing user .
Set password...	Set a password.
Reset domain user	Reset the domain user . The value in the field Windows user is deleted.

Section Confirmation workflow

Because of Basel II it is necessary that a valuation is controlled by a second person. That means one person adds the valuations and the other person controls it. He declares it to be OK by confirming it. **A confirmed valuation can't be changed or deleted.**

This module has to be paid and licensed separately.

- **Confirmation workflow NOT registered:** There is no change in the handling of the program. There is only a new option in the maintenance dialog that displays the message that this module has to be licensed for use.
- **Confirmation workflow registered:** Licensing this module automatically confirms all existing valuations which can't be changed or deleted from that point of time. Editing such a valuation is possible by deactivating the option **Lock automatic confirmed valuations** in the maintenance in the tab **System settings** in the group **Confirmation workflow**. Another way is to **duplicate** the valuation. The duplicated valuation has to be confirmed. After licensing this module each new valuation has to be confirmed.

Workflow of a confirmation

The section **Confirmation workflow** is active for users with the role **Auditor** and **Admin** in the maintenance. **To confirm valuations the following steps have to be done:**

- Define filter criteria to search for a specific valuation (Description, Cadastral number, District court/Land register, Valuation date, Client number, Name, Consultant).
- Press the button

- In addition to the filter criteria you can use **filter** (press the button ). In the dialog **Filter rules for the valuation search** several filters are available. Only active valuations are shown in the list per default. The filtering rules are saved by pressing the button **OK**. Then press the button .
- Mark a filtered valuation in the confirmation workflow and press the right mouse button. The context menu is opened. Select an action for the current valuation - [see Context menu](#).

Note: Only valuations are listed in the result set that haven't been created by the current user. This is an important rule that corresponds to the dual-control principle.

Context menu

Mark a filtered valuation in the confirmation workflow and press the right mouse button. The context menu is opened.

	Pressing this button sets the status of the selected valuations to confirmed or unconfirmed . Dialog Confirmation workflow Define the status (confirmed , unconfirmed). In the tab Comment add a comment for confirmation. In the tab Basel II history you can find all data of the workflow for manually confirmed valuations. The list shows all actions of a negative valuation (e. g.: broken rules in the Basel II wizard or manually negative valuation).
	Opens the print dialog.
	The key data of the selected valuation are visible.
	The valuations in the list are selected and deselected.

Section Interface

Note: This function is only available to specific users.

In this section you can validate your data and check the last synchronization.

Tab Overview

Validation of the last synchronization (real estate valuation)

This is an overview of data that cannot be synchronized with the interface because the data do not match the necessary criteria. By selecting the desired strategy and WTL you can filter the valuations by pressing the button .

The following minimum standards must be fulfilled to synchronize a data set with PKS:

- Client number and cadastral number must not be empty
- Kg (Land register number)

The following format has to be kept:

District court <Line break>

Land register number <Comma> Land register

- **Strategy: Cadastral number**
 - Cadastral number must not be empty
 - Kg (see above)
 - No double cadastral numbers and land register numbers are allowed.

You can filter the valuations that do not match these criteria. **Red** marked cells show an error. **Yellow** marked cells show that a valuation is excluded from synchronization.

Tab Synchronization

Validation of own data (real estate valuation)

The handling is comparable to the previous mentioned module. The most important difference is that the result is not your own data but the result of the last **PKS/LBW synchronization**. In the tab **Addition** (lower part of the window) you can see the current settings of your interface.

The export of the result can be done by the context menu (**right mouse button / Export selection...**).

Section Asset quality review

Note: This function is only available to specific users.

AQR (Asset quality review) is used to monitor the portfolio quality with regard to price development. Please refer to the [AQR manual](#) for more information.

Section gewerbliche Liegenschaftsschätzung

Note: This feature is only available to specific users.

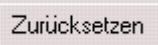
To spend all users a **standardized catalogue** of property types at the levels **Properties, Buildings** and also in the **maintenance** a user with the role **Admin** has to activate this feature.

Note: Only as **Administrator** you are privileged to activate this feature. Be aware that changed settings only become active when you terminate and start the program.

The activation has to be done in the **maintenance** in the section **gewerbliche Liegenschaftsschätzung**. In the tab **Plugin / group Aktivierung** you have to enter the **delivered key**. To activate this feature press



the button . In the tab **Plugin / group Drucktemplates** the maintenance of the cover inclusive the header and footer can be done.

	Import your own print template.
	Export the selected print template as a RTF file (Rich Text Format) .
	Reset the default template.

Section Journal

Note: This function is only available to specific users. Furthermore, the module "Revisionssicherheit" has to be bought. With this module each change on valuations can be reproduced.

The following changes on valuations are reported:

- Changes on the valuation date and/or market value
- Changes on the personal data at the level Properties
- Changes on the EZ (cadastral number), land register, economic entity and/or the identifier of the property

Section Personalization terms

Terms can be renamed in different languages which affects the output and the client. **The following steps have to be done:**

- Choose the desired language in the drop down list.
- When you click the button  you can define the source and the target term. If you want to save your changed term, click the button **OK**.
- When you click on the button  a selected term is deleted.

Note: The changed terms become active after closing and starting the application.

Section Categories

In this section it is possible to maintain **types of categories** (client types, property types and building types). **The following steps have to be done:**

- In the list select the type of category.
- Select the desired category type in the dialog **Categories** and press the **right mouse button** to open the **context menu**. Select an action for the selected valuation - [look at Context menu](#).

Note: The client types are available at the level **Clients**, the property types at the level **Properties** and the building types at the level **DRC value** in the field **Type**.

Function of the button

Sort...	Pressing this button (in the lower right corner of the window) changes the order of the categories of the selected type of category. In the dialog sort... select a category and change the order by selecting an action in the context menu (right mouse button). To save the changes, press the button OK .
Konsolidieren...	Pressing this button (is positioned in the lower right part of the dialog Categories) categorizes the property types. Note: If you want to maintain these settings, you need the role Admin . These settings are activated when you close and restart the program. This function is only available to specific users. The categorization of the property types is very important for the communication with foreign systems . For the communication with such a system it is im-

	<p>portant to consolidate the property types.</p> <p>Note: A predefined list of property types is integrated. This list can't be changed. Only property types that are not categorized can be consolidated.</p> <p>When you add a new type, you have to consolidate it with an existing type.</p>
	<p>Therefore press the button Konsolidieren... in the dialog Categories. In this dialog you see a category Uncategorized, in which all property types (even passive) are listed that are not assigned to a hierarchy.</p> <p>To consolidate a type selects the destination type. This type already has to be consolidated. Then press the right mouse button. To consolidate press the button Yes in the dialog. Now all properties with the source type will be assigned the destination type. This is done for the current, historic, validated and not validated properties.</p>

Context menu

To open the context menu select an already existing type or category in the dialog **Categories** and press the **right mouse button**.

	Edit an existing category type.
	<p>Add a category type.</p> <p>In the dialog New: the following parameters can be given:</p> <ul style="list-style-type: none"> • In the input box Designation define the value for the designation of the category type. • Define the status (ACTIVE, INACTIVE). <p>Note:</p> <p>Category types with the status INACTIVE are not listed in the field Type at the appropriate level.</p> <ul style="list-style-type: none"> • There are further input boxes for adding a property type: <ul style="list-style-type: none"> • Select the type of object in the list. • Define the value of the interface in the input field Value interface. • If the check box View property interests is marked a part of the land value can be defined in the building level for the property type. • If the status is set to INACTIVE the total land value is considered at the calculation of the market value. • The field Structure is automatically filled when you click on the button Konsolidierung. <p>Note: These settings are activated at the next start of the program.</p>
	<p>Delete an existing category type.</p> <p>Note: A predefined list of standard types is integrated in the program. No element of this list can be changed or deleted.</p>

Section Header

In this section you can define the **headers** for printing **according to your needs**. If you **delete a header** the section is printing without a header.

The following steps have to be done:

- Select the type of printing (**Valuation report, Compact**).
- Click in the input box, change the value and press the key **Enter**.

Function of the buttons

	Sort the headers per categories .
	Sort the headers alphabetically .

Section Units

In this section you can **maintain units** that are used in valuations. **The following steps have to be done:**

- Select the desired unit in the dialog **Units** and open the context menu by pressing the **right mouse button**.
- Activate the desired action - [look at context menu](#).

Note: Existing units are available at the level **DRC value** or **Investment properties**.

Function of the button

Sort...	When you press this button (lower right corner of the window) the order of the units is changed. In the dialog Sort... select the desired unit and open the context menu by pressing the right mouse button to change the order. In order to save the order, press the button Ok .
----------------	--

Context menu

To open the context menu select an **existing unit** and press the **right mouse button**.

	Edit an existing unit.
	Add a unit. The following steps have to be done: <ul style="list-style-type: none"> • Define the singular value for the unit in the input box Singular. • Define the plural value for the unit in the input box Plural. • Select the type (Size, Body, and Unit).
	Delete an existing unit.

Section Unit assignment

In this section you can assign a unit to a category (**Value influencing factors, Object part, Building section, Gross income and Occupancy rate**). **The following steps have to be done:**

- Select the desired **category**.

Note: The assigned units are available at the categories.

- Select a unit in the group **available**.
- Press the button  to assign the selected unit to the assigned units. Repeat this action as often as all desired units are assigned to a category.

Section Area zoning

In this section you can maintain **area zonings**. The following steps have to be done:

- Select an area zoning by a double click.
- Select the entry **Additional zoning** in the dialog **Area zoning** and open the **context menu** by pressing the **right mouse button**. Select the desired function - [look at Context menu](#).

Note: Existing area dedications area available at the level **Lands** in the group **Dedication**.

Context menu

The context menu is opened by selecting an **area zoning category** and pressing the **right mouse button**.

	Edit an existing area zoning.
	Add a new area zoning to the selected zoning category. Capture the designation and press the button Ok . Note: These settings are activated at the next start of the program.
	Delete an existing area zoning.

Section Zip codes/city

In this section you can maintain **zip codes** and **cities** for the desired nation.

Note: **Zip codes** and **cities** are available at the level **Clients** and **Properties**. By default the zip codes ad cities are integrated in the database for the nation Austria.

Adding a nation

The following steps have to be done:

- In the dialog **Zip code/city** click on the link **Maintain**.
- Press the **right mouse button** to open the **context menu** in the dialog **Nations....**. Activate the desired action. Select the desired action - [look at Context menu](#).

Note: Existing nations are available at the level **Clients** and **Properties**.

Function of the links

Maintain	Here you can maintain nations .
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Consolidate nations	Nations that are added for several times are consolidated. Note: These settings are activated at the next start of the program.
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Context menu

Select a nation in the dialog **Nations...** and open the **context menu** by pressing the **right mouse button**.

	Edit an existing nation.
	<p>Add a nation.</p> <p>The following steps have to be done:</p> <ul style="list-style-type: none"> In the group Nation type in the desired designation and short designation. Note: For the environment analysis it is necessary to capture the short name of Bing Maps (e.g. AT for Austria). If the short name does not correspond the environment analysis can't be done and you receive the error message "Address could not be found". In the group Options you can change the designations from Austria to the designations that you use in your country. In the group Lists... you can maintain an individual list of district courts/land registry and zip codes/cities to a nation if the structure is similar to that of Austria (district court is separated in land registry and land registry number). By clicking on the links export... or import... a list of district courts/land registry and zip codes/cities can be exported or imported to a nation in form of a CSV list. Note: When you export the list you automatically get the needed structure of the CSV file. Edit the file and import is by clicking on the link import.... Technical information: The CSV file must be coded as UTF-8 which means that you have to select the file type "CSV (MS-DOS)".
	Delete an existing nation (only if no valuation is assigned).

Adding a zip code and city

The following steps have to be done:

- Select the **desired nation**.
- In the group **Search** in the dialog **Zip code/city** capture the desired zip code and press the button **Search....**
- Select a zip code and open the context menu by pressing the right mouse button. Select the desired action - [look at Context menu](#).

Note: Existing zip codes and cities are available at the level **Clients** or **Properties**.

Context menu

	Edit a zip code or city.
	Add a zip code or city.
	<p>The following steps have to be done:</p> <ul style="list-style-type: none"> Type in a zip code and city. Select the nation.

	Delete a zip code or city.
---	----------------------------

Section Value influencing factors

In this section you can maintain **value influencing factors** for the wizards. **The following steps have to be done:**

- In the dialog **Edit value influencing factors** select a category and a type.
- Select an entry in the list and open the **context menu** by pressing the right mouse button. Select the desired action - [look at Context menu](#).

Note: These factors are available when you press the button .

Function of the button

	Here you can maintain the types .
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Context menu

	Edit a value influencing factor.
	Add a value influencing factor.
	The following actions have to be done: <ul style="list-style-type: none"> • Capture the designation and amount. • Define the type (Absolute, Percent, and Units). • In the group Description capture a detailed description.
	Delete a value influencing factor.
	Press these buttons to change the order of the listed value influencing factors.

Section Style sheets

In this section you can maintain style sheets for descriptions and standard or compact printing. **The following steps have to be done:**

- Select the desired style sheet.
- Click twice to open the dialog **Style sheets**. Change the selected style sheet according to your desired needs.

Select a style sheet and open the **context menu** by pressing the **right mouse button**.

	Change the properties of the font .
	Change the properties of the font color .

You can change the alignment by selecting an entry from the list **Align**.

- To save the changes, press the button **Ok**.

Note: It is possible to define more than one style sheets. In this case select one of them in the print dialog. The selected style sheet in the printing dialog is used at the valuation report. The formats are used in the document.

Function of the button

Maintain	Here you can maintain the style sheets for the different levels of the valuation report. All defined style sheets are assigned to the selected level at printing. Example: The style sheet Header 1 is identical to the style sheet Überschrift 1. This means that all settings of Überschrift 1 are active which has consequences on the structure of the index of contents.
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Context menu

Select a style sheet in the dialog **Style sheets** and open the **context menu** by pressing the **right mouse button**.

	Edit an existing style sheet .
	Add a style sheet .
	The following steps have to be done: <ul style="list-style-type: none"> • Capture a name. • Define the properties of the font and font color. • In the list Alignment you can change the alignment.
	Delete an existing style sheet .

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

Section Cover sheet, header and footer

Here, **cover sheets including headers and footers** are created.

Important: 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.

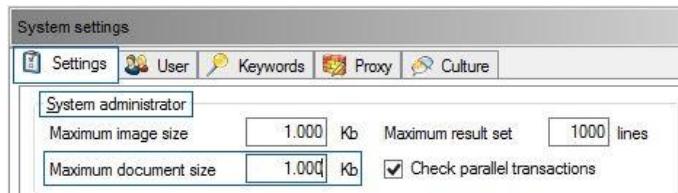
The **file size** of your cover page should never exceed **1,000 KB (1 MB)**. Otherwise the database will be affected and this could lead to performance problems.

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

See chapter [Instructions / Toolbar Word processing / Inserting macros / Macro list](#)

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.

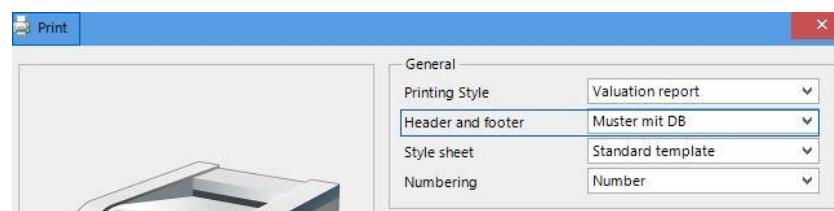
Step 3: Adding a cover sheet

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 colours** 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.

Section Wizard

In this section you can define standard wizards. **The following steps have to be done:**

- Select a category from the list.
- Select a wizard and open the context menu by pressing the right mouse button. Select the desired action - [look at Context menu](#).

The section **Wizards** is only visible if the option **Use Basel II wizard generally** is not activated in the section **System settings** in the tab **Settings** in the group **General**.

Note: These wizards are available in the tab **Productivity** by a press the button .

Context menu

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

	Edit an existing wizard .
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	<p>Add a wizard.</p> <p>In the dialog Wizard selection... type in the designation of the wizard and press the button OK. Depending on the selected category the following tabs will be displayed:</p> <ul style="list-style-type: none"> • Land • Building • Fair market value <p>At this location you can maintain standard values and standard rates.</p>						
	<p>Context menu of the above mentioned tabs</p> <p>Select a standard value and open the context menu by pressing the right mouse button.</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="text-align: center; padding: 2px;"></td><td style="padding: 2px;">Open an existing standard value.</td></tr> <tr> <td style="text-align: center; padding: 2px;"></td><td style="padding: 2px;">Add a standard value.</td></tr> <tr> <td style="text-align: center; padding: 2px;"></td><td style="padding: 2px;">Delete an existing standard value.</td></tr> </table>		Open an existing standard value.		Add a standard value.		Delete an existing standard value.
	Open an existing standard value.						
	Add a standard value.						
	Delete an existing standard value.						
	Delete an existing wizard .						
Rename	Change the designation of an existing wizard.						

Section Lending value

In this section you can maintain **internal lending values**. The following steps have to be done:

- Select an existing lending value and open the context menu by pressing the right mouse button.
Select the desired action - [Look at Context menu](#).

Context menu

	Open an existing lending value .
	<p>Add a lending value.</p> <p>In the dialog Edit lending value... type in the designation and the percentage. To save the lending value, press the button OK.</p>
	Delete an existing lending value .

Section Ten2Click valuation

Note: This feature is only available to specific users.

Here you can use the **selection list** to define whether the **distribution of the land and building value** should be displayed within the **Overview level**.