



Click**FORMS**™ Data Import Wizard

Step-By-Step Instructions

ClickFORMS version 9.12 +





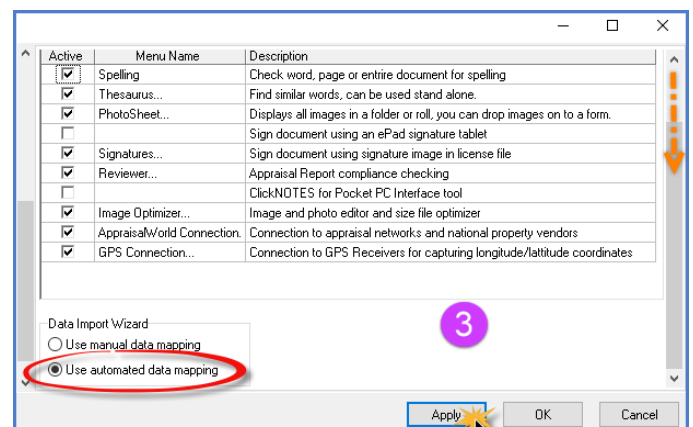
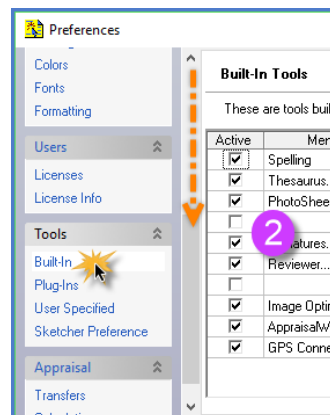
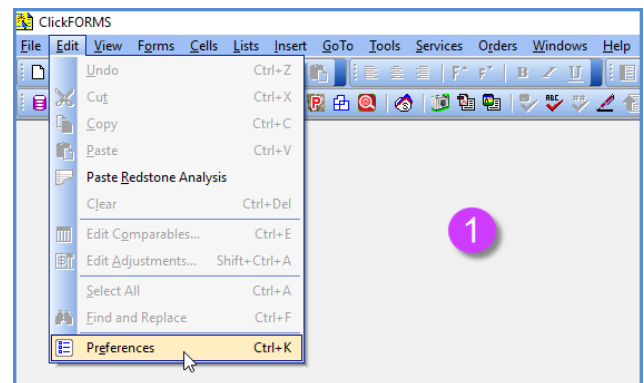
Instructions for the NEW Automated ClickFORMS MLS Import Wizard

These instructions assume that your Multiple Listing Service account is setup to export data for use with this product. **NOTE:** If your MLS is setup for use with Redstone or CompCruncher, the same export format will work with the new ClickFORMS MLS Import Wizard. If you need assistance to setup your MLS, please call **800-622-8727**.

Using the Automated Data Import Wizard

1. By default, ClickFORMS is installed to use the Manual Data Mapping capability. The new ClickFORMS MLS Import Wizard requires the **"Automated Data Mapping"** option. To change this option, click on the **"Edit"** tab from the main menu, then select **"Preferences"**. This step will need to be completed on all installations of ClickFORMS.
2. From the left side of the window, scroll down to the **"Tools"** category and click on the **"Built-In"** link.
3. From the right side of the window, scroll to the bottom until you see the **"Data Import Wizard"** radio button box. Select the **"Use automated data mapping"** radio button. Click the **"Apply"** button, then click **"OK"**.

Your ClickFORMS software is now setup to use the new ClickFORMS Data Import Wizard.



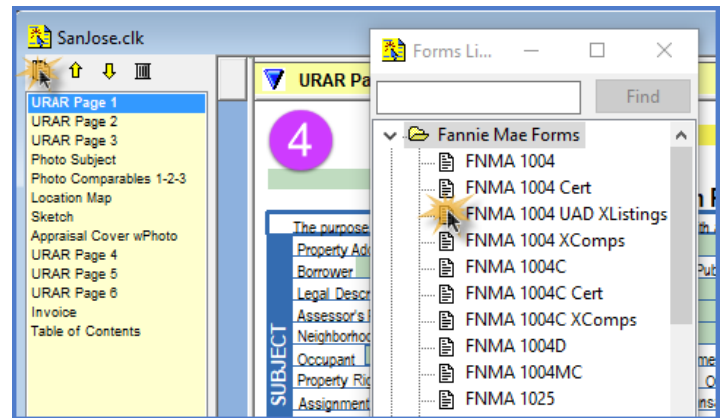


Importing Your Data

To use the Data Import Wizard, you must first export a .CSV, .TXT or .TSV file from your MLS of the search you want to use. Once you have this export, save the file to your computer. ClickFORMS prefers you save your MLS Export file to the: **Documents/My ClickFORMS/MLS Imports** folder. However, you may save your file to another location on your hard drive as long as you know where to browse to locate your file.

4. In ClickFORMS, open your report or template that you will be using to import your data. **IMPORTANT: Include the number of necessary Sold and Listing forms necessary to complete your appraisal report.**

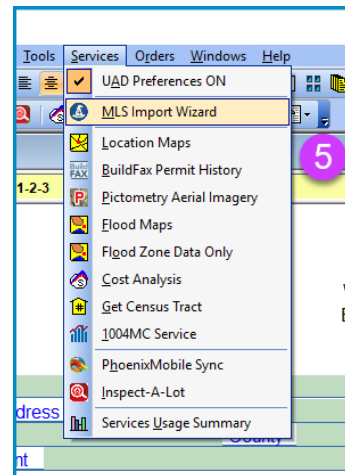
The ClickFORMS Data Import Wizard will not work unless you have a report or template open with the necessary sold or listing forms included before using this service. The number of Sold/Listing comps will determine the number of sales/listing you will be able to import into the sales/listing grids on the report.



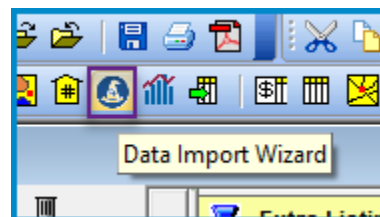
5. There are a few different ways to get to the MLS Import Wizard in ClickFORMS.

- From the main ClickFORMS menu click on **Services**, then select **MLS Import Wizard**.

or



- If you have the **"Workflow Toolbar"** (View -> Tool Bars -> Show/Hide Toolbars -> Workflow Toolbar) visible, simply click the MLS Import Wizard icon.

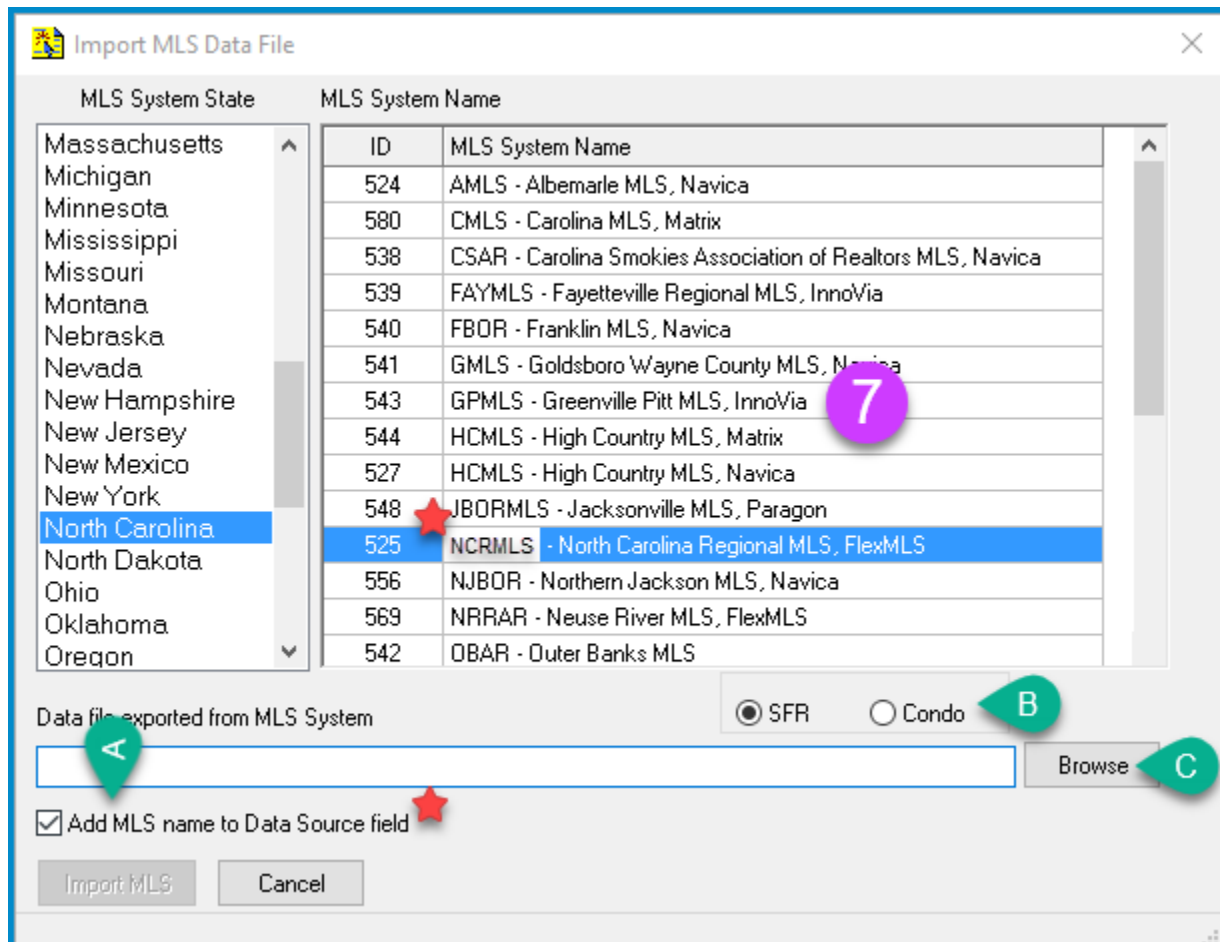




6. At the top-left of the MLS Import Wizard screen, click on the **Import MLS** button.



7. If this is your first time importing MLS Data into ClickFORMS, you will need to select your **state** from the **left column**, then select your **MLS name** from the **right column**.
- If you wish to add your MLS name to the Data Source Field in your appraisal report, click the **"Add MLS name to Data Source field"**. **NOTE:** This option will put just the characters before the (-) dash shown in your MLS system name into comp grid in lieu of just MLS#.
 - IMPORTANT:** Select **SFR** or **Condo** for the property type you are importing. This is important when saving preferences for attached and detached properties later explained in this guide.
 - Click the **"Browse"** button to locate your MLS data file. **Double-click your data file.** The MLS Import Wizard will begin processing your data.



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DATA IMPORT WIZARD

Errors : 1
Duplicate : 0
Overwrite Existing Data.
Automatically Convert to UAD Format

Import MLS
Export Data
Imported Sales : 37
Excluded : 0
Remaining : 37
Imported Listings : 6
Excluded : 0
Remaining : 6
Find Next Error
is Duplicate
Transfer To Report

Import To	Kind	Street Address	Unit #	City	Zip	GLA	Site Area	Bsmt Area	BFArea	TotalRms	BedRms	Total Baths	Full Baths	1/2 Baths	Design	Stories	Yr Built	Actual Age	Sale Price
▼	Listin	4880 Elysianville Lane		San Jose	95138	2060	4050	0	0	9	4	2.5	2	1	2,Contemporary	2	1998	19	
▼	Listin	7262 Breaking Ridge Avenue		San Jose	95138	2179	6534	0	0	9	4	2.5	2	1	2,	2	2006	11	
▼	Listin	7218 Via Roma		San Jose	95139	2396	6500	0	0	9	4	2.5	2	1	2,	2	1972	45	
▼	Listin	6348 Purple Hills Drive		San Jose	95119	2124	6000	0	0	9	4	2.5	2	1	2,Contemporary	2	1972	45	
▼	Listin	387 Beckham Drive		San Jose	95123	2256	6099	0	0	9	4	2.5	2	1	2,Contemporary	2	1975	42	
▼	Listin	321 Goldings Court		San Jose	95139	2137	6050	0	0	9	4	2.5	2	1	2,	2	1977	40	

- ## Modifying Your Data

- ☒ Overwrite Existing Data.

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☒ Automatically Convert to UAD Format

Imported Sales : 37

Excluded : 0

Remaining : 37

Imported Listings : 6

Excluded : 0

Remaining : 6

Find Next Error

- [illegible]



- Locate the **"Design"** header in the grid. **Right click** in a Design data field to bring up the MLS Data Verification window. In the **"Replace With:"** field type in the UAD value that you would like to see in your report. For Example: **DT2;TRAD** or how you typically display the design in UAD. This new data will replace the MLS data value.

The **"Replace All"** method can be used on any column in the Data Import Wizard grid.

- From the **"Import To"** column (*left most column*), **click on the small drop-down arrow** to label the record in your report, Subject, Listing1... or Comp1....

- Finally, click on the **"Transfer to Report"** button. Your MLS data is now transferred into your ClickFORMS report.

If you require any help or have questions
about the ClickFORMS Data Import
Wizard,



call us at 800-622-8727