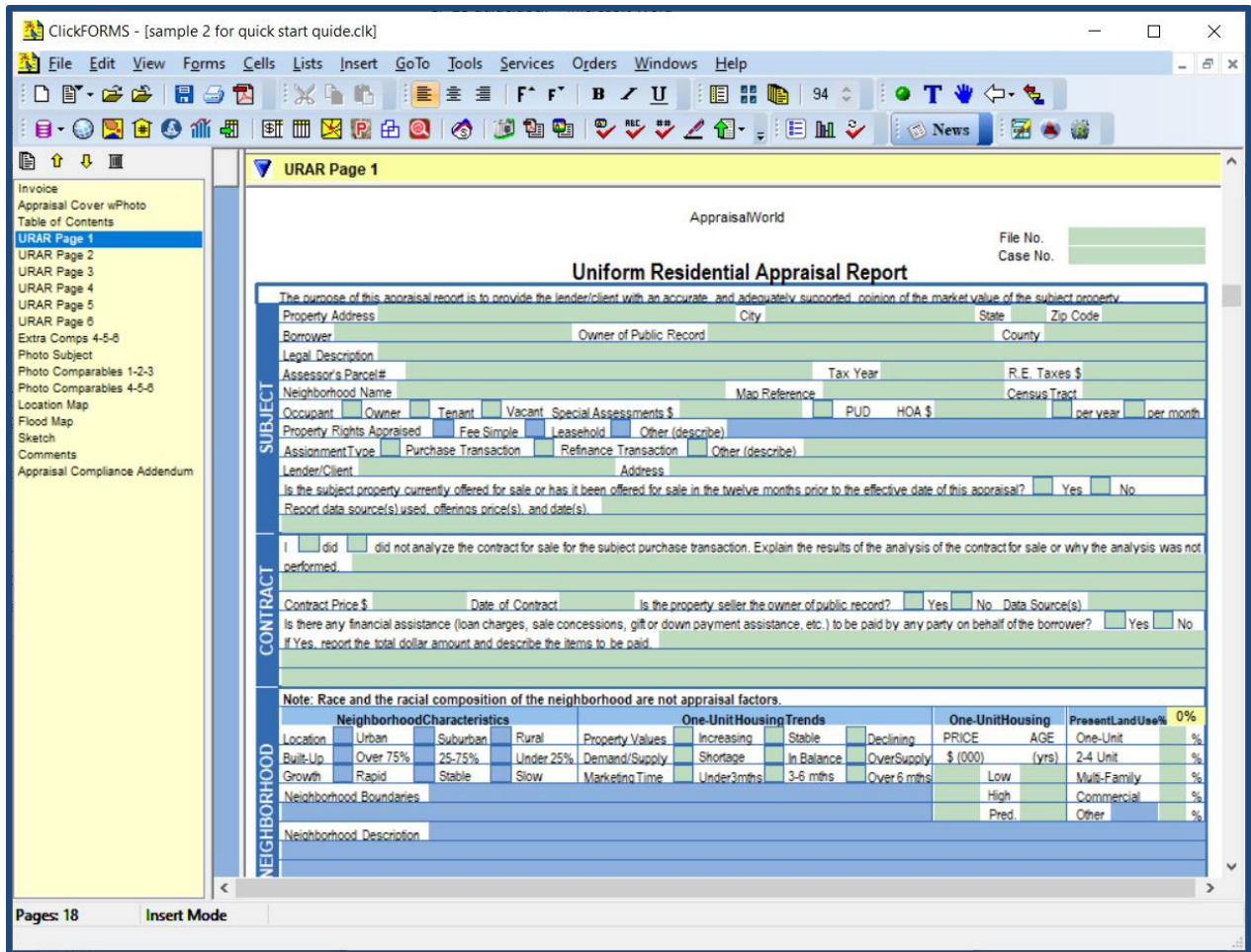# Click**FORMS**®

Quickstart Tutorial

Intro Page

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Updated 6/22/2020

Welcome

All of us at Bradford Technologies welcome you to the ClickFORMS family. If you are evaluating ClickFORMS, we are here to assist you and we hope you will chose to continue using ClickFORMS to complete your future property valuations.

Bradford Technologies is a privately held company exclusively dedicated to provide innovative software to improve appraiser efficiency. With more than 30 years of experience behind us, we are uniquely positioned to help appraisers meet current and future property valuation challenges.

Purpose of this Guide

This quick start guide is designed to get you started using ClickFORMS and serves as a how to guide for ClickFORMS basic functions. Other TechTip quides are also available providing more in-depth information on specific ClickFORMS operations.

A list is available on this web page: https://support.bradfordsoftware.com/cf-docs

You may either print out this guide to use as a reference or bookmark or access it from your ClickFORMS Help dropdown menu.

Support and Sales Contact Information

Our Support Team is available to assist you if you have questions or require additional instruction.

Monday – Friday   **6:00 a.m. to 6:00 p.m. PT**

Saturday & Sunday   **8:00 a.m. to 3:00 p.m. PT**

Email:

      Support: **support@BradfordSoftware.com**

      Sales: **sales@BradfordSoftware.com**

Phone: **800-622-8727**

BRADFORD TECHNOLOGIES

302 Piercy Road,

San Jose, CA 95138

http://www.bradfordsoftware.com

Table of Contents

Introduction

Getting Started

We know you don't have a lot of time, so we have written this booklet to help you understand the major ClickFORMS functions as quickly as possible. Follow this outline and you will be using ClickFORMS for processing appraisals in twenty minutes or less.

First, install the software.

The first thing you want to do is gain an overview of what the program can do for you. Install the software using "ClickFORMS: How to Download and Install" Guide.

Second, go through the tutorial. (Approximately 20 minutes)

The tutorial will take you through the highlights of the program from "Starting a New Report" to "Getting Help". After reading this Tutorial, you will know how to produce a complete appraisal report.

Third, familiarize yourself with your Operating System.

ClickFORMS is designed for the Windows operating system. Although the software will function on all Microsoft Windows operating systems Windows 7 and higher, all of the screenshots in this documentation were captured under a Windows 10 environment.

Windows XP is no longer supported. Microsoft has announced that they will no longer be supporting the Windows 7 operating system in early 2020.

The following is the minimum system requirements for running the ClickFORMS software:

- Windows® 10 Operating System
- At least 4GB of RAM, 8 or more for a new computer
- At least 250MB of free disk space
- At least 1280 x 800 screen resolution
- High-speed internet connection

    NOTE: Apple MAC (even running Parellels ® or Boot Camp ®) is not supported

Any of the newer processors supporting Windows 10 will work fine for ClickFORMS. Internet speed, adequate RAM and a high speed hard disk or solid state drive are the most import factors to consider if you are buying a new computer.

If you haven't already, it is highly recommended that you have a process/service in place to make regular backups of your computer data.

Thank you for taking the time to evaluate ClickFORMS software. - Bradford Technologies
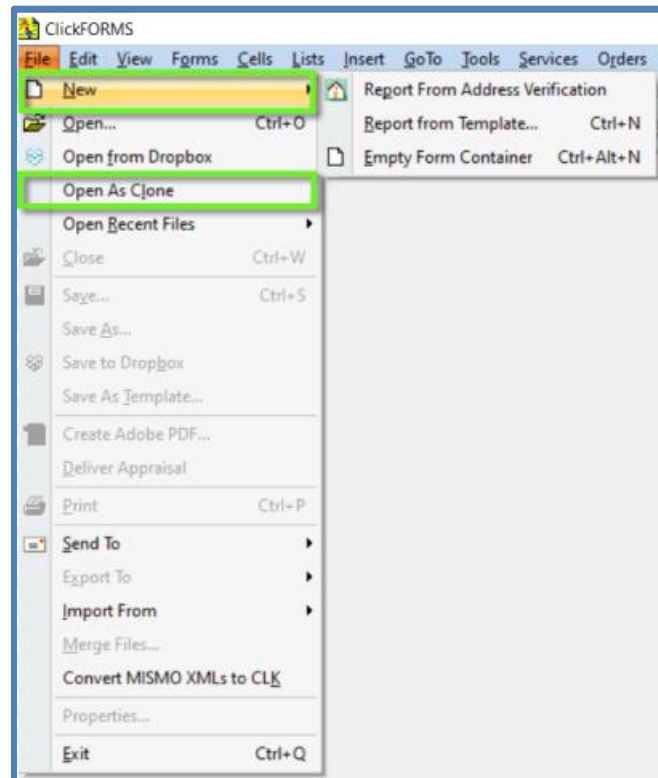
Starting a New Report

Start the application by clicking on the ClickFORMS program shortcut icon located on your desktop or on the task bar usually placed on the bottom of your monitor.
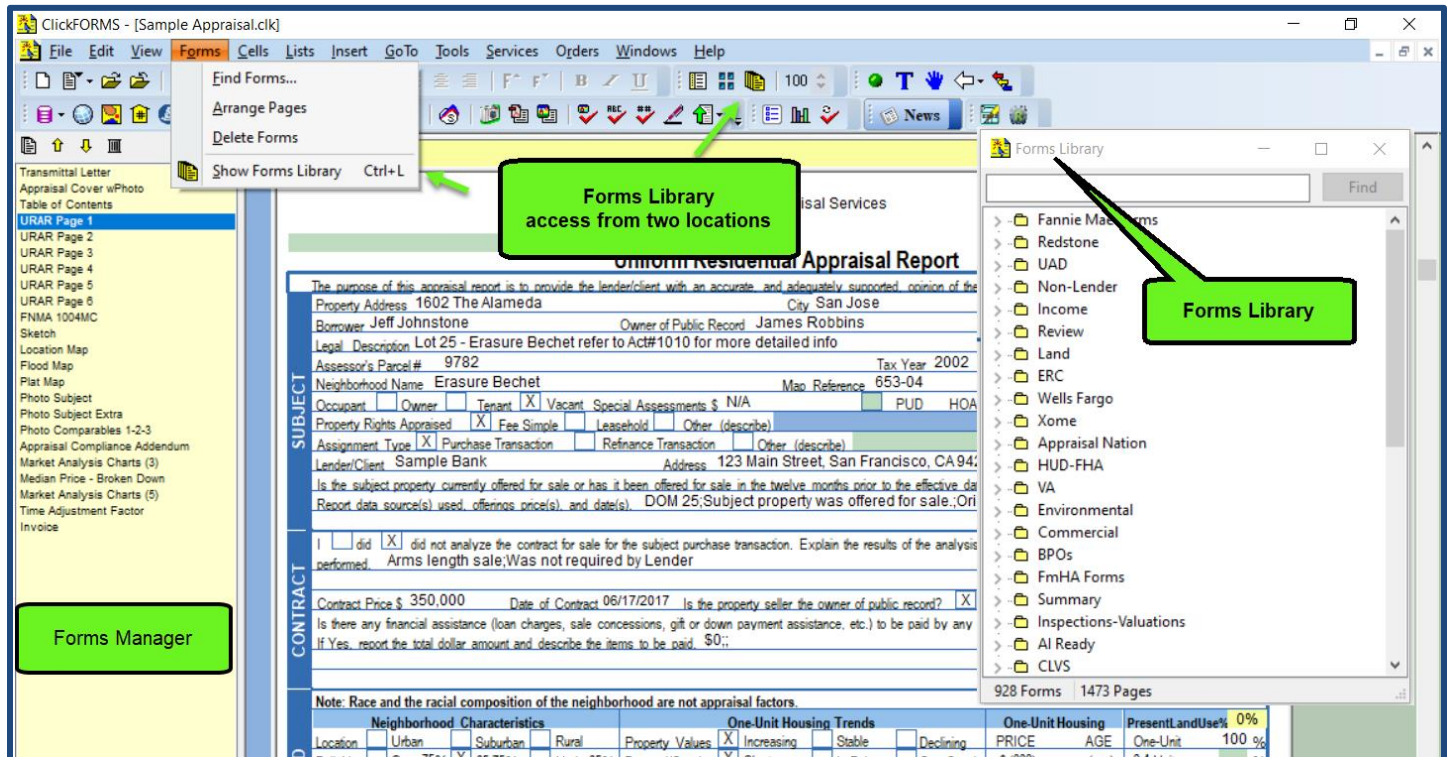
A sample report form opens in the **Workspace.**

- The **Forms Manager** listing the forms included within the report is located on the left side of the workspace
- Additional forms can be found within the **Forms Library**
- The **Forms Library** can be opened:
    - From the **Forms** dropdown menu
    - Clicking the **Forms Library** icon
    - Simultaneously press the **Control Key + L** keys. Just one of ClickFORMS **PowerKeys**

Experienced ClickForms appraisers will start a new report by clicking on the File dropdown menu and

Options include for starting a new report

- **Report from Template**: Allows for selection of either a standard template or an Appraiser's custom template
- **New**: Opens an empty file container allowing the appraiser to select forms from the forms library
- *Optional:* **Report From Address Verification**: Opens the Address Verification window allowing for the selection of a template and entry of an address for verification of location. Note: Address verification option can be turned on under Startup Preferences
- **Open as a Clone**: Access a previous report and saving it with a new name. The report is filled in with new information.

Notice: Cloning previously completed reports is not recommended by Bradford Technologies. Appraisers are encouraged to create Templates that can be used for different types of property valuations. The option was added as requested by appraisers to avoid saving the modified report over the previously completed report. .

Templates

Sample Templates are included for the most common report types. Creating and using templates is the cleanest way to start new reports as opposed to cloning old reports which require a lot of cleanup or starting from an empty forms container.
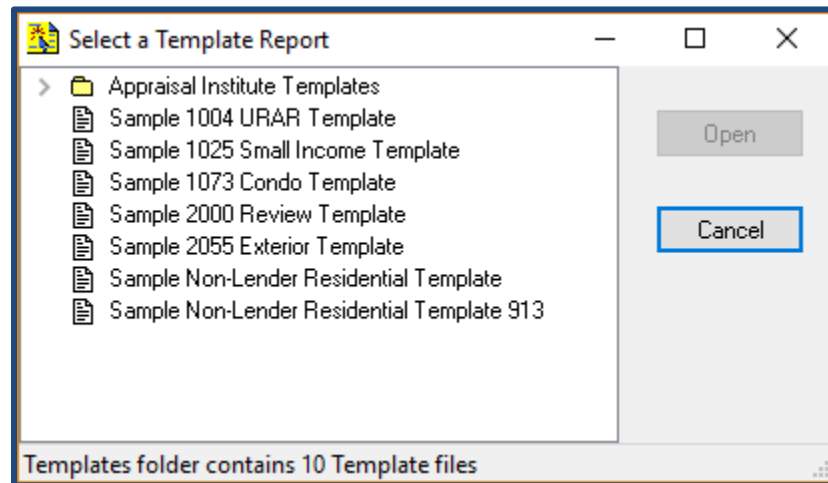
- Templates can be accessed by going to File > New > Report from Template or pressing **Ctrl + N**.
- Any number of templates can be created. Once a file is created, using the **Save As Template** option in the **File Menu** will save the current file as a template.
- Templates are displayed in alphabetical order.
- To edit a template, open your **Template**, make changes and use the **Save as Template** option as described above.
- Exhibit pages containing copies of your license, E&O insurance and other information you like to include with all your reports can be added to and saved to any template.
- Templates can be created for specific customers as well as types of reports.
- Previous report files can be cleaned of subject property and comp information, saved as a template and be used to create future valuations.

Address Verification

This function allows for checking the property address for validity and location.

As shown above there are many tasks that are completed on this page. The purpose of this page is to:

- Verify the subject property address is valid
- Correct/accept address modifications if indicated
- Location of the subject property is accurate
- Report template is selected
- Desired services are selected
- Effective date is set
- Start the appraisal

Notice: If there isn't an applicable template, select the closest match. Report pages can be added from the forms library as needed. Unwanted forms are removed.

Adding Forms
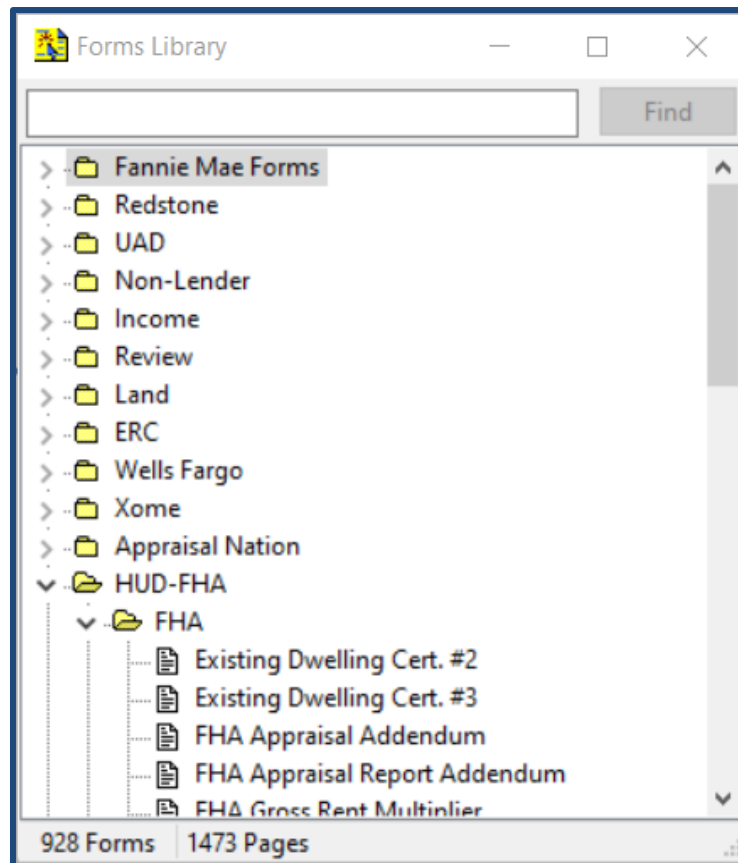
- The **Forms Library** contains all the forms available in ClickFORMS.
- Use the Search field at the top of the box and type in the name of a specific form to locate it within the library.
- You can also scroll down to a desired folder. Click on the folder and the specific forms and available sub-folders will be displayed. Click the folder again and it will close.
- To add a form to your report, either double-click the form name or click and drag the form to the Workspace.

Forms Manager
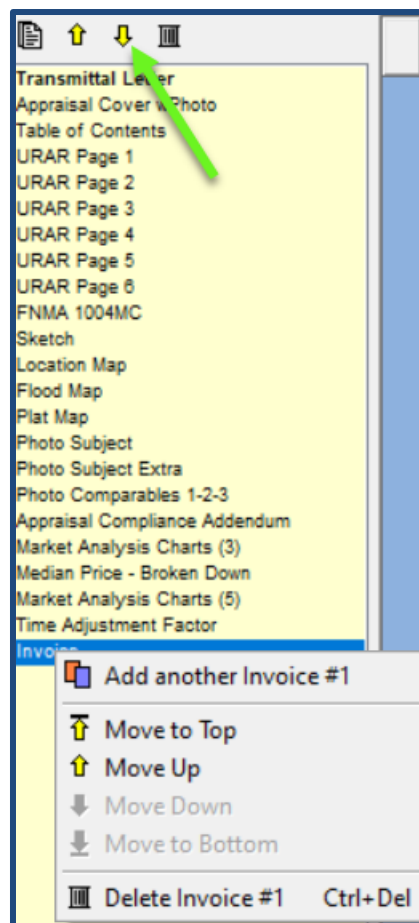
- The **Forms Manager** lists all of the forms contained within the report in the order they appear.
- To move a form, click on it to highlight it. You can either click-hold-and-drag it to the desired location or you can use the up and down arrows located at the top of the **Forms Manager**.
- Clicking the **Trash can** to the right of the arrows will remove a form from the **Forms Manager**.
- Click the **Forms Library** Icon to the left of the arrows to open the **Forms Library**.

Right click a listed form and a menu appears. You can use the functions to:

- Duplicate a form
- Move the form to the top or bottom
- Move a form up and down one space at a time
- Delete the selected form

Note: A deleted form cannot be undone. A warning box does appear to ask, "Are you sure?"

Notice: Form names appearing in Red in the Forms manager window have been moved to the Archive folder. New forms have been created to replace the archived form and added to the Forms Library.

ClickFORMS Navigation

Below is a picture of the ClickFORMS window. There are many ways to navigate within a report. On this page we've documented both what you'll see, and a few of the ways to easily move around.

Page Title Bars

Click on the arrows in the Page Title Bars to collapse or expand Individual pages or collapse all from the View Menu selection.

Got To menu

Click on the **GoTo** menu to browse to the previous or next page. Click the **Page Navigator** to view a thumbnail of all pages.

Move Field to Field

Press the **Tab** or **Enter** key to move to the next field. Press **Shift+Tab** to return to the previous field
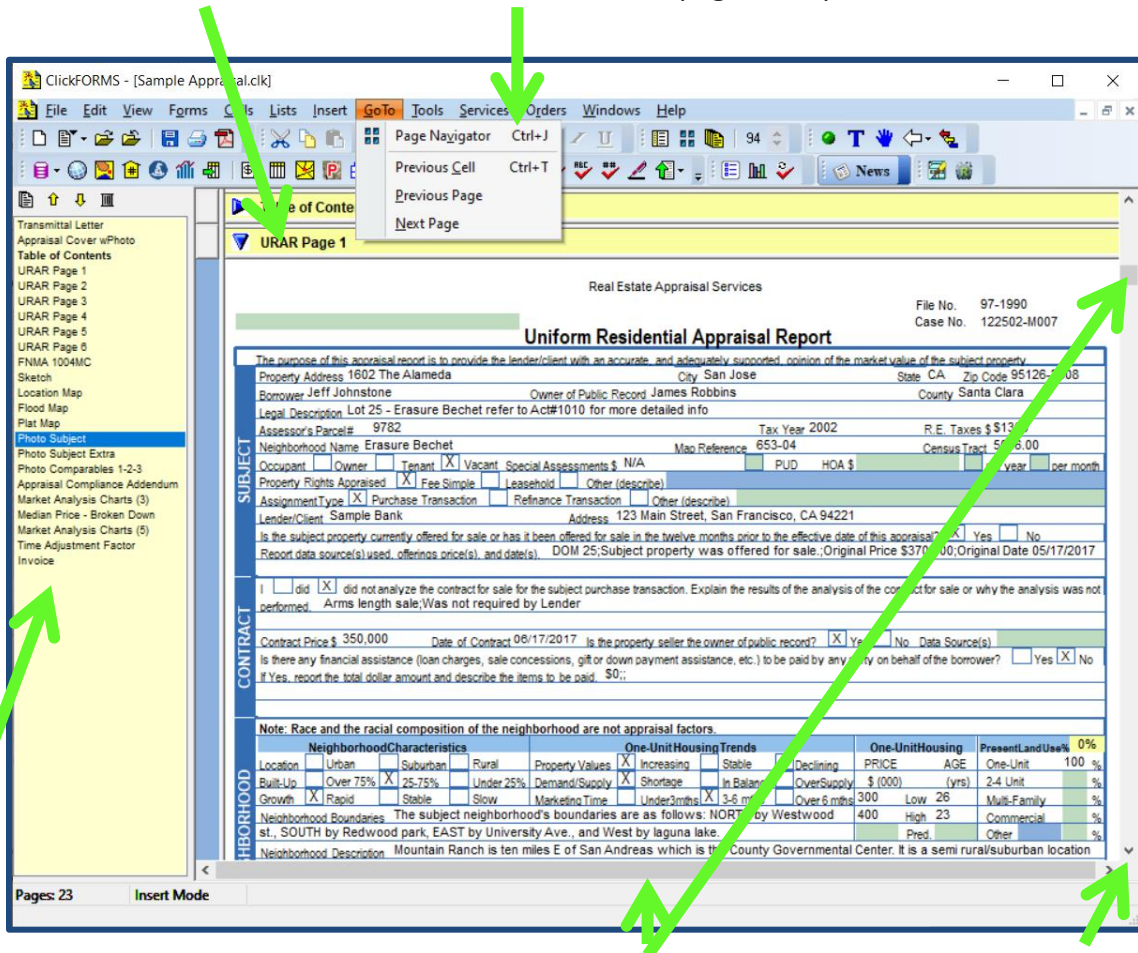
Forms Manager

Click on any page in The **Forms Manager** To display that page in your Work-Space.

Move Up and Down

Press the Up and Down Arrow keys on your keyboard.

Scrollbars

Use the Scrollbars to scroll areas of your Report quickly into view.

Scrollbar Arrows

Use scrollbar arrows to scroll slowly through through the report.

Collapsible Pages
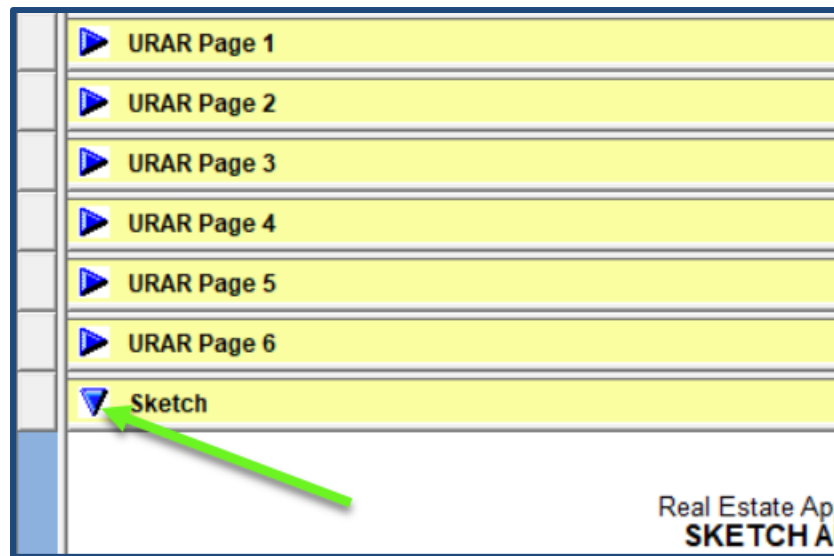
- Page Title Bars are displayed at the top of each page in your report.
- To expand any page in your report, click on the blue arrow. When the arrow is pointing down, the page is expanded
- Click on the arrow a second time to collapse the page. When the arrow is pointing towards the right, the page is collapsed. To Expand or Collapse all pages, chose the **View** dropdown menu and select **Expand all Pages, F3** or **Collapse All Pages, Shift+F3**
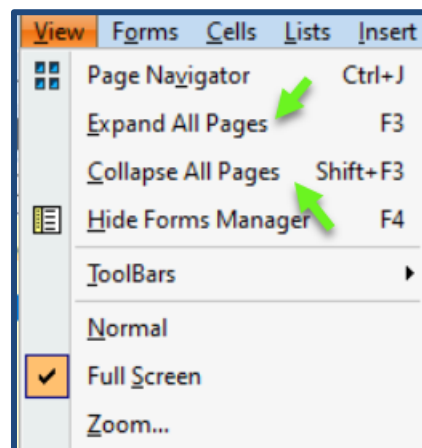
The View dropdown menu also has selections for Expanding and Collapsing All Pages

Preferences Overview

Preferences are accessed within the **Edit** menu. There are numerous ways you can customize ClickFORMS to better meet your needs.
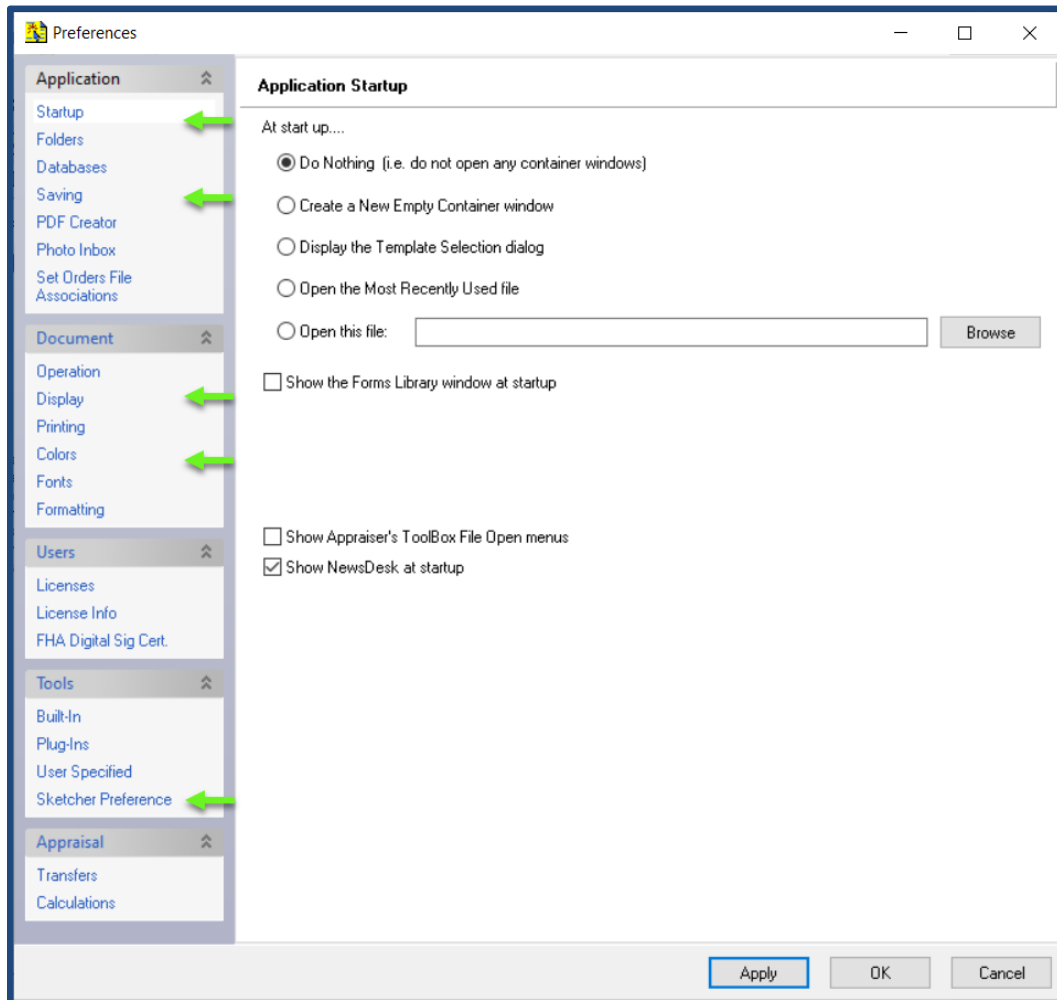
As this is your initial setup, we will focus on the most common options; these are indicated by the green arrows.

Setting Preferences

- Startup

- o Click the box for desired options
  - New users will chose to Show the Forms Library Window
  - The Address Verification window has been re-added to ClickForms and can be set to come up when a new template is selected

Notice: Address verification will not work on cloned reports or reports started from an empty file container.

- Saving

- o Click your preferred Default File Name format

Continued on Next Page

Preference Settings (Continued)

- Display

- Set the desired window scale percent. Default is 94%. This percentage can also be adjusted on the ClickFORMS Tool bar as shown below:

- Colors

- Set Free Form Text to Black by clicking on the green square and selecting black. When completed, Click Apply.
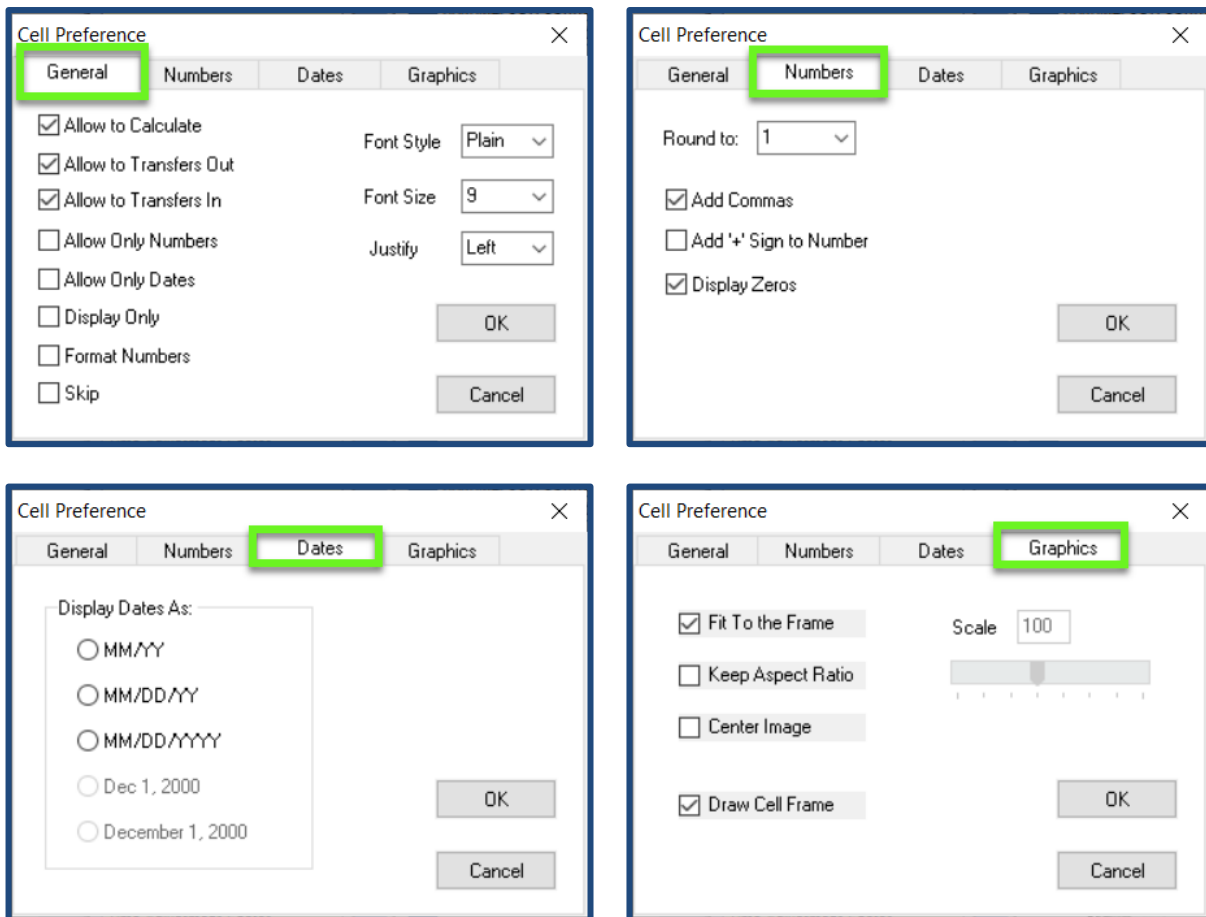
Preference Settings (Continued)

- Sketcher Preference

- o Select Sketcher that you have either installed or plan on installing.

Notice: ClickFORMS does not come with a sketcher. If you need a sketcher, you may purchase one through ClickFORMS Sales. **1-800-622-8727 Option 1**.

Cell Preferences:

The Cells Preferences dialogue box for a cell can be accessed from the Cells menu or by right clicking on the cell and selecting Cell Preferences.

- General Preferences: This is where you can change calculation, display and transfer settings for each cell.
- Numbers: You can round off any number automatically, set decimals or commas and display zeros, if necessary.
- Dates: Display your dates in any format.
- Graphics: Control the way your graphics are displayed framed and fit to the cell.

Cell Types

Standard Cells

These are single line fields. Data you enter
In these fields will transfer to every form
That has this same field.

Comments Cells

These are multi-line fields that usually require
a description or explanation from the appraiser.

Check Boxes
One of the easiest ways to make
a selection is to click on a check
box to select it.

Number Cell
Only numeric values are
allowed in these types of
cells.

Cell Formatting

You can set the particular display, behavior or page formatting of individual fields. Use the commands in the center of the Cell Menu to set any cell's style justification and font size.

Cell Formatting Toolbar Shortcuts

You can click on the corresponding Toolbar icons to set the active cell's style, font size and justification.

Cut, Copy, Paste and Clear Cell Text
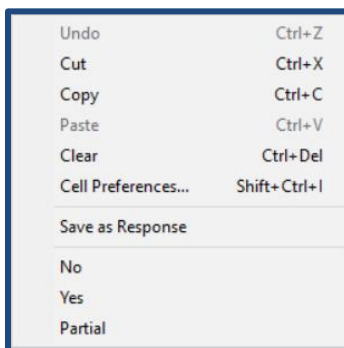
- First select the text you'd like to edit by highlighting it, and then you can right click the highlighted area and select the desired function.
- You may also save the highlighted text as a comment for future use.

To eliminate one mouse-click, use the short cut keys on the task bar

Time Saving Features

ClickFORMS has many time saving features that allow you to reduce the time needed to enter information into your report. Here are a couple of the biggest time savers.

Auto Adjustments

- To display this dialog box, go to the **Edit** menu and select **Edit Adjustments**
- Single Use Adjustments: Select which adjustment you want to activate and set the **Automatic Adjustment criteria** and click on the APPLY button.
- Permanent Adjustments: Complete the **Automatic Adjustment** criteria for all the adjustments you generally make. Click on the Save List As button to store the list for future reports.
- To set a default adjustments list, click the box in front of Use these adjustment values in new reports.

Standard Responses

All standard fields allow you to save response for future use. Some industry standard responses come pre-installed with your copy of ClickFORMS.
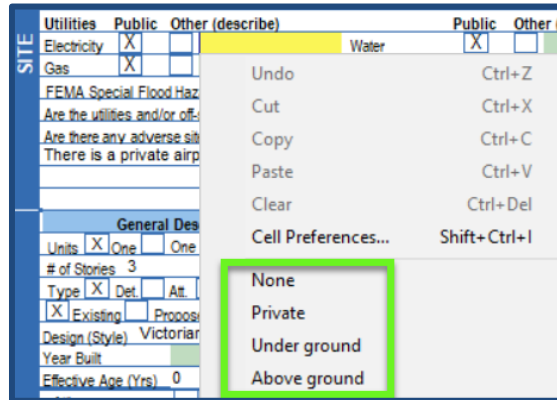
- To save a response, type the response you would like to save and then press **Ctrl + F2** or go to Cells > Save As Response
- To view your saved responses for that field, right click on your mouse or press **F2** on your keyboard.
- To Edit a response, click on the cell that has the response you want to edit, then press **Shift + F2** or go to Cells > Edit Responses

Standard Comments
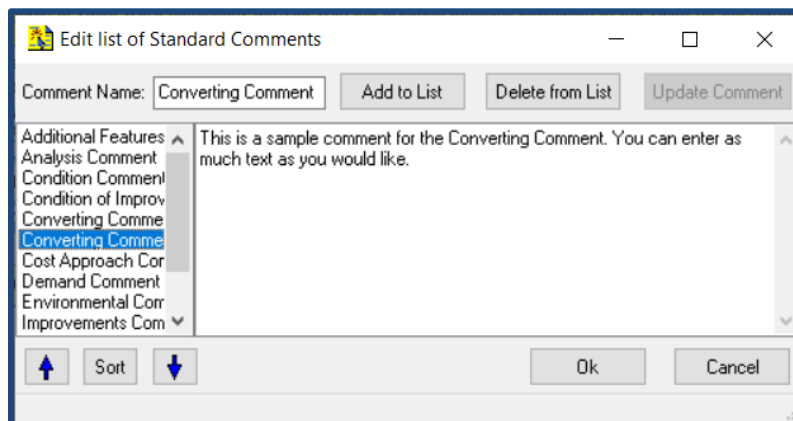
- To save a comment, type the comment you would like to save and then press **Ctrl + F2** or go to Cells > Save Comment. You can then give your comment a name and select Add to List.
- To view your saved comments, right click on your mouse or press **F2** to select from your list of saved comments.
- To Edit a comment, click on the cell that has the comment you want to edit, then press **Shift + F2** or go to Cells > Edit Comment

PhotoSheet and Images

Adding photos, maps and scanned documents is now faster and easier to perform.

- Add any number of photos of any size to your photo cells using the PhotoSheet tool. Located in the Tools menu.
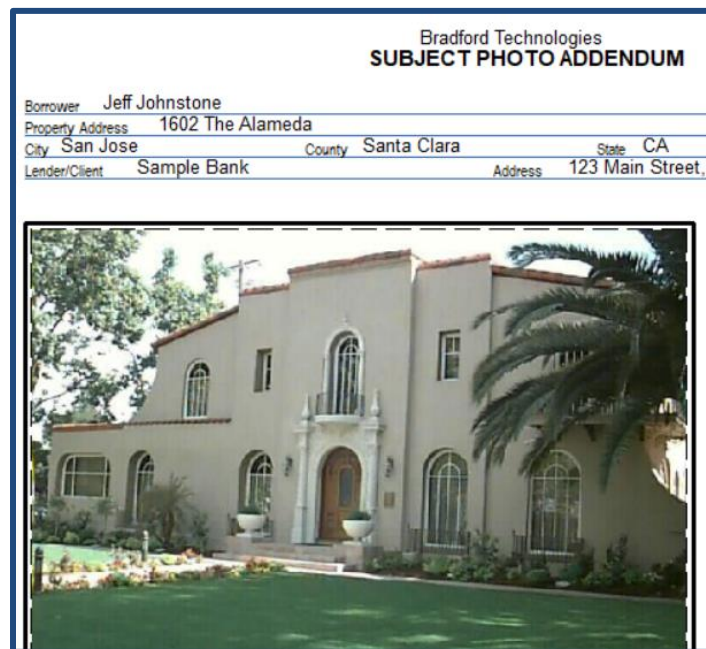
- Drag and drop a photo from the PhotoSheet directly into the image cell.

Services
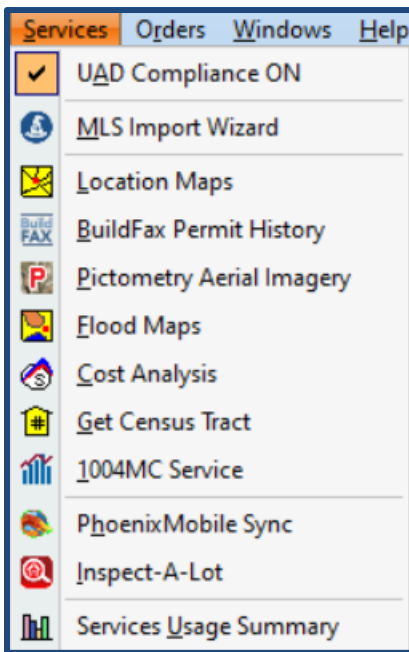
- You can access a number of services that are either included or available at an additional cost. Many services are included with the ClickFORMS Gold and Platinum subscriptions. Ask your sales representative about adding services to your subscription.
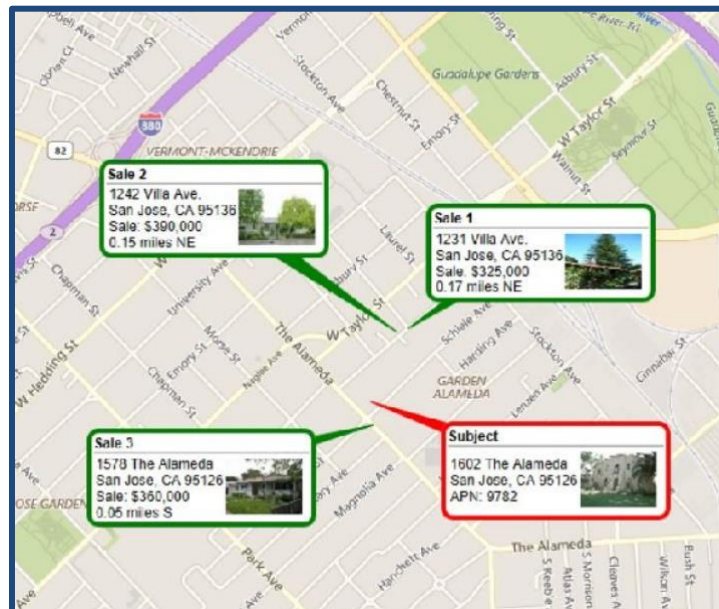
- You can design and scale your location maps with the included mapping program.

Inserting Images, PDFs and Scanned Documents

Undo	Ctrl+Z
Cut	Ctrl+X
Copy	Ctrl+C
Paste	Ctrl+V
Clear	Ctrl+Del
Cell Preferences...	Shift+Ctrl+I
Image Editor...	
Save Image To File...	
Insert from PDF File	
Insert Image from File	Ctrl+G
Insert Image from Device	
Setup Device Source	

Insert menu:
- Insert Today's Date — Ctrl+D
- Insert from PDF File
- Insert Image from File — Ctrl+G
- Insert Image from Device
- Setup Device Source
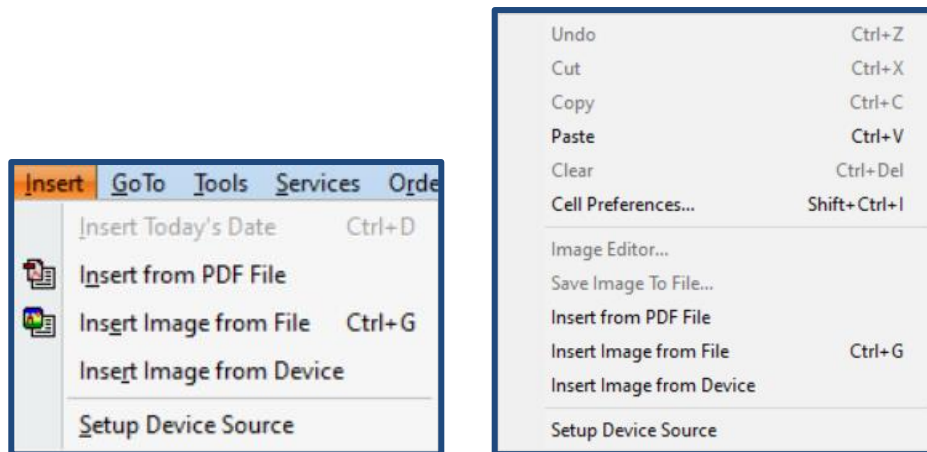
- In the Insert menu or right clicking a photo or exhibit cell provides for a number of options including inserting from PDF, form File or from a Device such as camera or scanner.

You can insert scanned documents into exhibit pages by using the Insert from PDF file option located in the Insert menu.

Select PDF Pages to Insert
- ◉ All Pages
- ○ Pages [1] to [1]

Insert Into...
- ◉ Selected Exhibit Cell
- ○ New Legal Size Exhibit Addendum
- ○ New Letter Size Exhibit Addendum
- ○ New Legal Size (no borders) Exhibit
- ○ New Letter Size (no borders) Exhibit

New Exhibit Title
[Sales Contract]

[Insert]   [Cancel]

PDF Document has 1 pages.
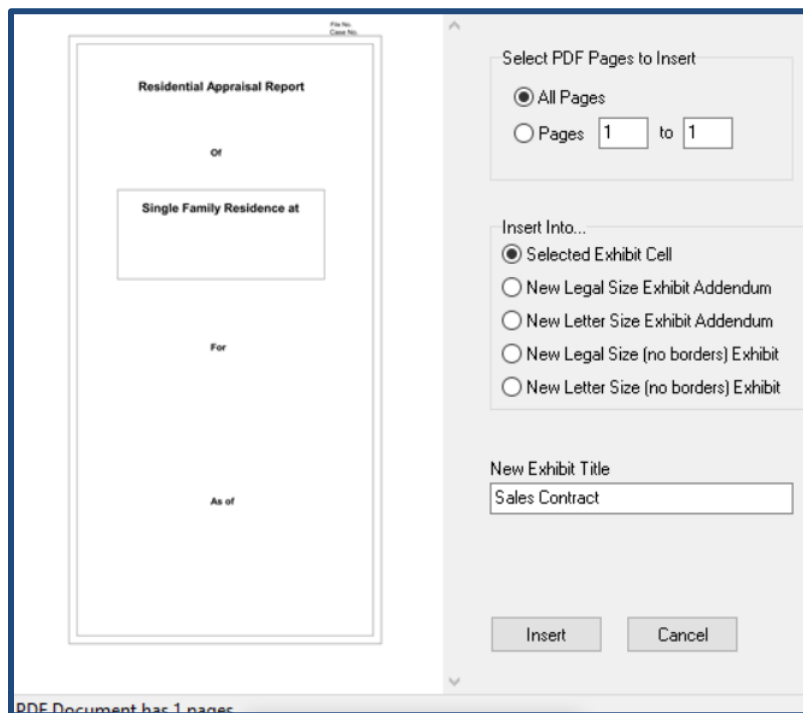
- Select a PDF and the option page above is displayed. ClickFORMS will automatically add the specified exhibit page style into your report.
- One, all or a selection of pages can be inserted with one operation
- Exhibit Titles are entered as part of the insertion process.

Digital Signatures

Before you can sign a report, you need an image of your signature. You can use a scanner to scan and crop your signature picture.

- If you want a colored signature, make sure you scan the colored document scanner setting.
- We recommended using Sharpie or other broad point pen when making your signature..
- To insure a straight signature on your forms, sign straight across the paper
- Making your signature a bit larger will make it more legible when it is reduced in size within the signature setup.
- Once you have the image on the page, be sure to crop excess white space.
- Save the image as a .jpg, picture file.

Setup your digital signature
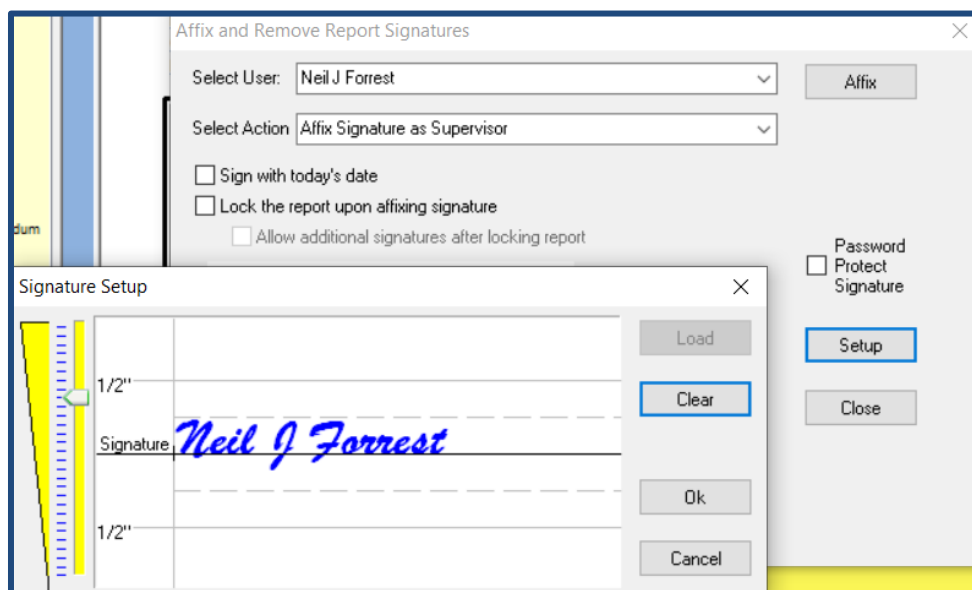
- To setup the signature within ClickFORMS, access the **Signatures** option in the **Tools** menu
- Click **Setup** and then load the signature file.
- Click and drag your signature to the signature line. Use the scaling tool on the left of your signature to scale the size of your signature.
- Press **Ok** to save.

Edit Menu Options

After creating or editing a report, you can save it to any media, network server, hard disk drive or the cloud.
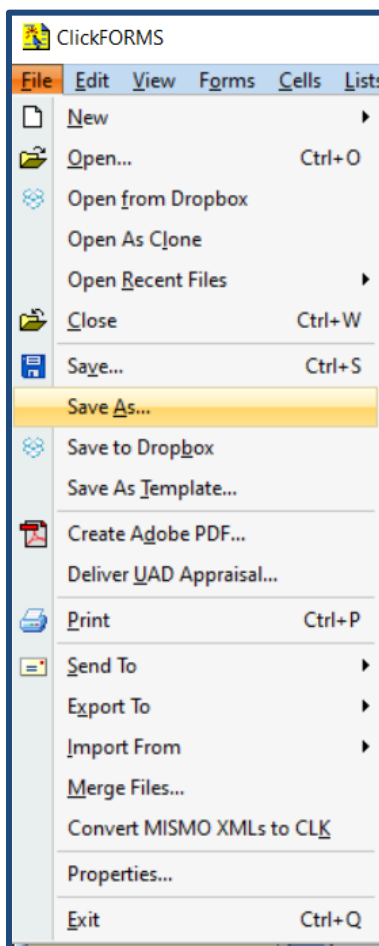
- **New:** Provides for opening a new report as an open container or from a template.
- **Open:** Access a previously saved file. Options include; open from Dropbox, Open as Clone and Open Recent
- **Close:** Closes a file. You will be prompted if the file has not been saved.
- **Save:** If you have an existing report file and wish to save changes to it, select the Save option or press the **CTRL+S keys**. If you do not have an easing file, you will first be asked to create and name the file.
- **Save As:** A convenient option for saving multiple copies or revisions of the same report.
- **Save As Template:** Create a report holder with the forms and exhibits you would like to include within a specific report type. Fill in repetitive information and other customizations. Save as template is an easy way to create a library of templates of various report types or for specific customers.

Edit Menu Options Continued
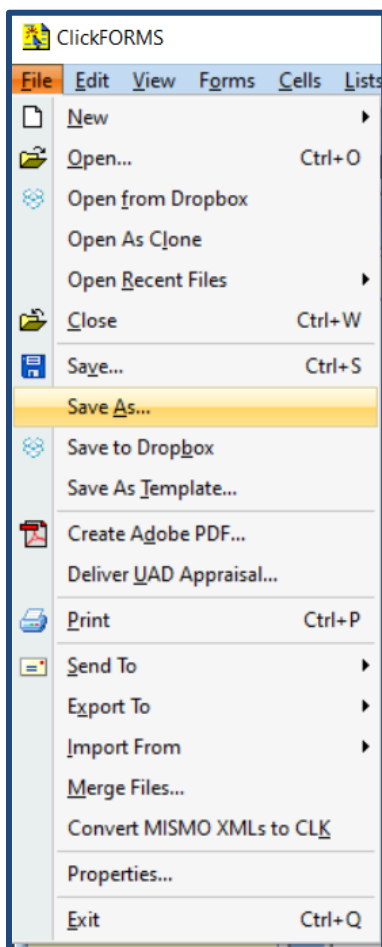
- **Save to Dropbox:** Provides for saving files to a Dropbox folder. Dropbox is a cloud file storage service you can subscribe to in addition to ClickFORMS.
- **Create Adobe PDF.** Various options allow for securing your PDF file.
- **Deliver UAD report.** Provides for various submittal options for XML and ENV files. Various portal options are available.
- **Print:** Provides for the selection and printing of your report pages.
- **Export To:** Used by tech support for the creation of a file that can be reimported into ClickFORMS. Sometimes used for a report with unresolvable issue.
- **Import From:** Provides for importing information into ClickFORMS. Options Include: Outside Vendor Property Data, ClickFORMS Text File, Data Import Wizard (MLS Data), Mismo XML file.
- **Merge Files:** Combine two report files into one report file.
- **Convert Mismo XMLs to CLK:** Allows for converting multiple UAD XML files into ClickFORMS files in one operation.

Reviewer

The review works similar to the review that is completed during the submittal process. As the review takes place just before submittal, the reviewer allows the appraiser to check the report before starting the multi-step submittal process. The same instructions apply to both review applications

- The Reviewer function is located in the **Tools** menu.
- Before you submit your report you can use the reviewer to check for errors within your report.
- The appraiser has the option of selecting the pages to be reviewed by placing a checkmark in front of the form listed within the box.
- There are three types of errors identified for appraiser consideration.
  - Warnings   Advised of an unexpected entry
  - Critical Warnings   Notified that a cell's information does not appear to be in compliance
  - Critical Errors   Must be changed in order to submit the report.
- If possible, move the Review clear of the report page view to speed up the review process
- Double clicking on an error moves the cursor to the applicable cell. The review window remains accessible. This provides the appraiser the opportunity to evaluate and make any desired changes.
- Clicking the **ReReview** button creates an updated list of warnings.

Notice: The appraiser is responsible for the contents of the report. There is no guarantee the reviewer will find all errors.

Report Submittal

There are numerous ways to submit reports. The following information provides a general overview.
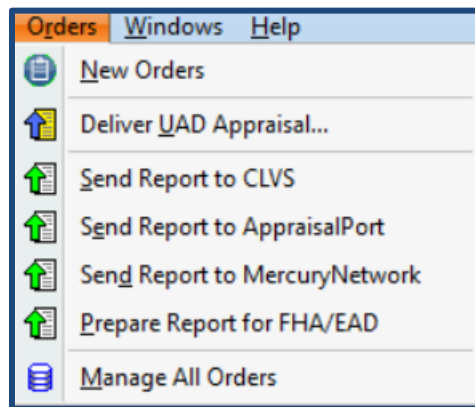
- Numerous portals are supported within ClickFORMS
- XML, ENV and PDF files can also be created and submitted through a web page or attached to an email message.
- Once an option is selected, the appraiser is walked through the process.

Saving Prepared Files

- At the end of the file submittal process, the above window provides for saving the files to the default location within the ClickFORMS folder.
- The **Save As** button is used to change the location for saving the file.
- The **Save all files** is used to save all files to one location.
- The **Browse** button is used to change the location where the files will be saved.
- The **Save All** button is used to save files to the locations shown

Notice: Due to the numerous email programs available, the button to Email Saved Files may not work for most appraisers.

Help Menu

Assistance is available to you through the Help dropdown menu.
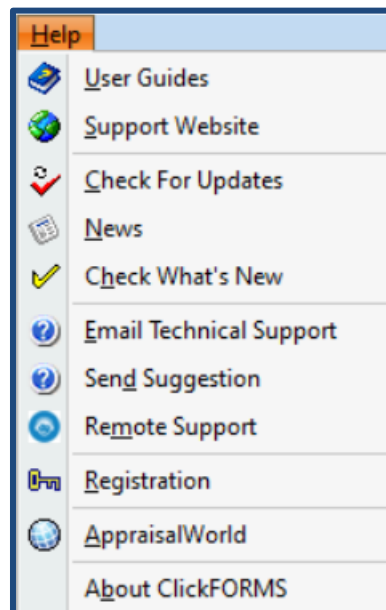
- **User Guides:** Takes you to the guides web page on the www.Bradfordsoftware.com website
- **Support Website:** Takes you to the support web page on the same website
- **Check For Updates:** Verify you are running the latest version of ClickFORMS and will download available update for installation on your computer.
- **News:** Accesses current ClickFORMS **NewsDesk** window.
- **Email Technical Support:** An internal process that sends an email to the support inbox with your question. Your contact information is included from your registration file. The inbox is continuously monitored during working hours.
- **Send Suggestion:** Works the same way as sending an **Email to Technical Support**.
- **Remote Support:** Links you to GoTO Assist. GoTo Assist is a web based program used by the Support Team to access your computer under your supervision.
- **Registration:** Contains your address, email address, license/certification information that is used by you as you create reports. Your email address and password provides access to the services you have purchased.
- **AppraisalWorld:** Is a link to the www.AppraisalWorld.com website. Use your email and password to access your **My Office** account on the website.
- **About ClickFORMS:** Displays a banner with ClickFORMS version information. Support may ask you to check this location to verify you have the most current version of ClickFORMS installed on your computer.

Reports and Comps Database
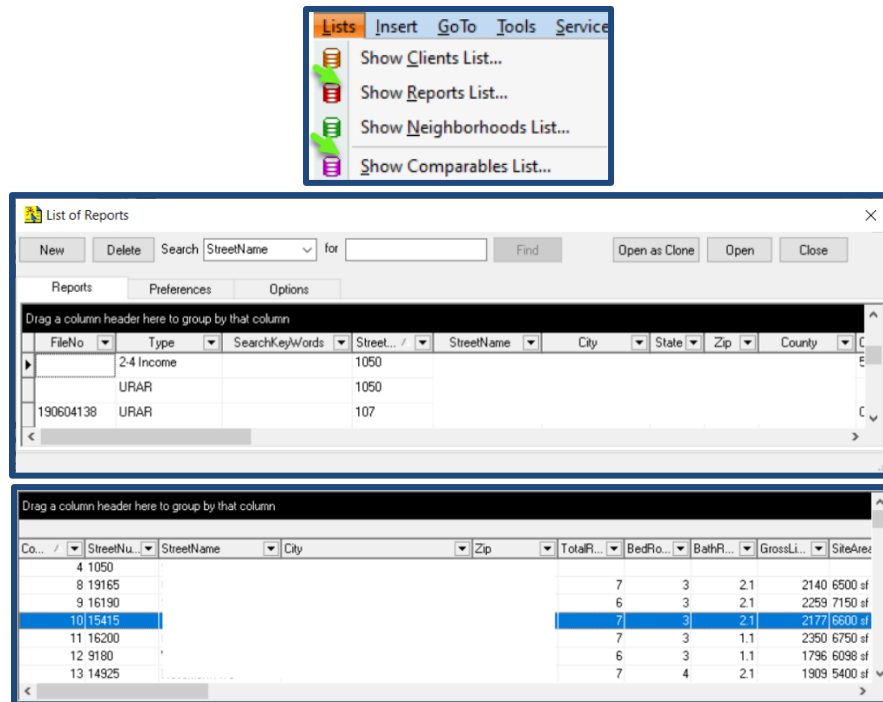
- The **Lists** menu accesses the built in Databases. There is a Client, Report, Neighborhood and Comparables database.
- The Reports Database is built by adding each report you create to the database
- The Comparables Database is built by adding the comparable used within your reports.
- During report file submittal, you will have the option to check the consistency of the comparables used with past uses of the same property. Inconsistencies will be indicated.
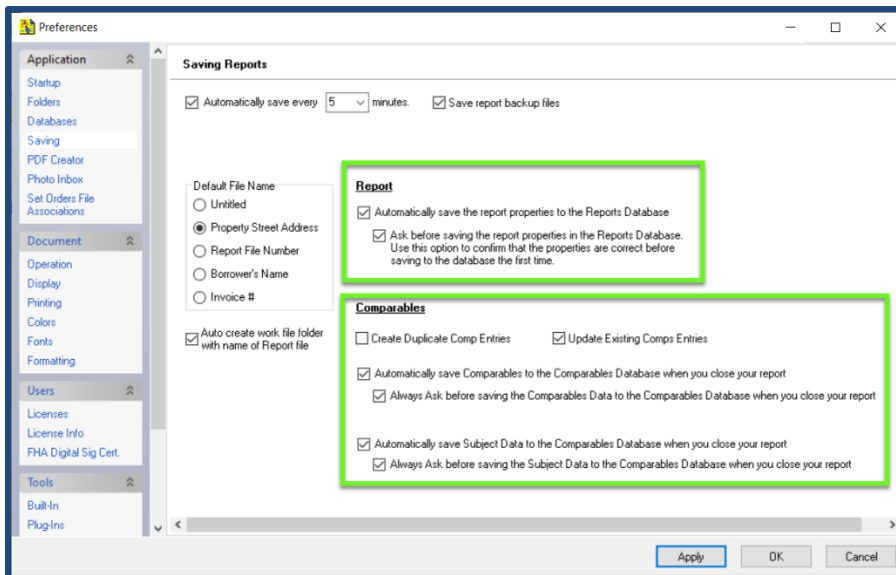
- The Reports and Comparables Database options can be set within the **Startup** section of **Preferences** located under the **Edit** dropdown menu. The options are self-explanatory.

ClickFORMS User File Folder

ClickFORMS keeps all the program files separate from the files that are created by you and are connected to your account. Updating or removing the ClickFORMS program will not involve your ClickFORMS folder stored under the Documents Library as shown below:
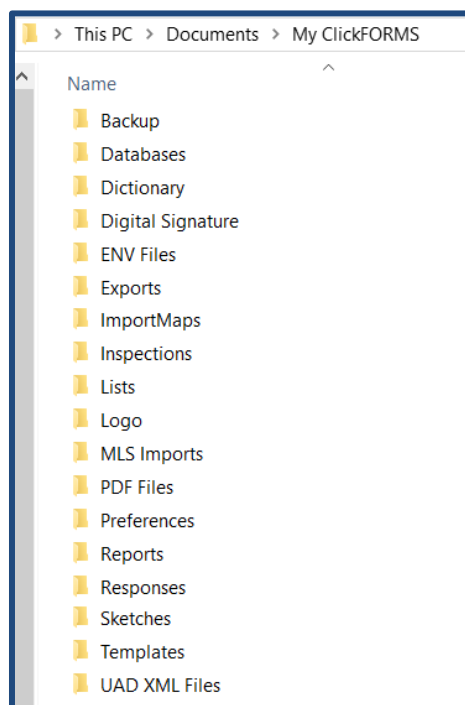
Important folder for you to know in alphabetical order:

- **Databases:** Contains the Reports, Comparables, Client and Neighborhood databases and related comparable photos
- **Digital Signature:** An empty folder where you may store a copy of your digital signature
- **ENV Files:** Default location for ENV file submittals
- **Inspections:** Default location for storing Inspect-A-Lot inspections reports
- **PDF Files:** Default location for report PDFs created during the submittal process
- **Reports:** Default location of your ClickFORMS report files. Also contains a Backups folder where a backup of your reports is stored.
- **Responses:** Stores your saved cell responses
- **Templates:** Default location where template files are stored
- **UAD XML files:** Default location where copies of the submitted report XML files are stored

Speed Keys Work Aid

On the next page is a list of frequently used keyboard shortcuts.
Below is an illustration of the Speed Keys tools you can download, cut out and place near your monitor.

https://support.bradfordsoftware.com/docs/CF-PowerKey-chart.pdf
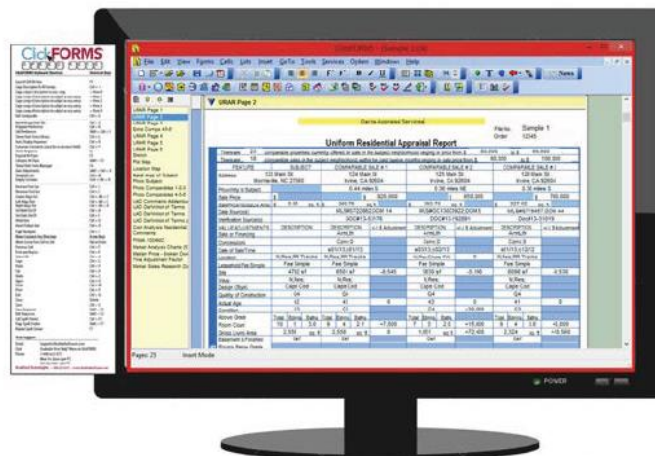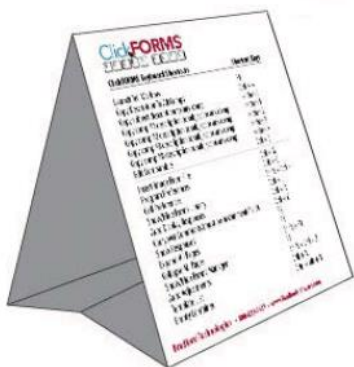
Fold the table tent as shown for your desktop   **Tape the long monitor version for easy viewing**

Speed Keys List

You may want to start with this smaller list of Speed Keys.

Copy Description To All Comps	Ctrl + =
Copy subject description to any comp	= 0
Copy comp #1 description to subject or any comp	= 1
Copy comp #2 description to subject or any comp	= 2
Copy comp #3 description to subject or any comp	= 3
Copy comp #X description to subject or any comp	= X
Edit Comparable	Ctrl + E
Insert Image From File	Ctrl + G
Program Preferences	Ctrl + K
Cell Preferences	Shift + Ctrl + I
Show/Hide Forms Library	Ctrl + L
Auto Display Responses	Ctrl + R
Carryover Comments (must be in comment field)	Ctrl + Y
Show Responses	F2
Expand All Pages	F3
Collapse All Pages	Shift + F3
Show/Hide Forms Manager	F4
Auto Adjustments	Shift + Ctrl + A
Template List	Crtl + N
Empty Container	Crtrl + Alt + N
Decrease Font Size	Ctrl + [
Center Align Text	Ctrl + Alt + C
Left Align Text	Ctrl + Alt + L
Right Align Text	Ctrl + Alt + R
Set Bold On/Off	Ctrl + B
Set Italic On/Off	Ctrl + I
Underline	Ctrl + U
Insert Todays Date	Ctrl + D
Page Navigator	Ctrl + J
Move Courser In Any Direction	Arrow Keys
Move Cursor From Cell to Cell	Tab or Enter
Previous Cell	Ctrl + T
Find and Replace	Ctrl + F
Select All	Ctrl + A
Copy	Ctrl + C
Paste	Ctrl + V
Cut	Ctrl + X
Undo	Ctrl + Z
Open	Ctrl + O
Close	Ctrl + W
Print	Ctrl + P
Exit	Ctrl + Q
Clear	Delete
Save	Ctrl + S
Save Responses	Shift + F2
Edit Reponses	Shift + F2
Cell Spell Checker	Ctrl + F7
Page Spell Checker	Shift + F7
Report Spell Checker	F7