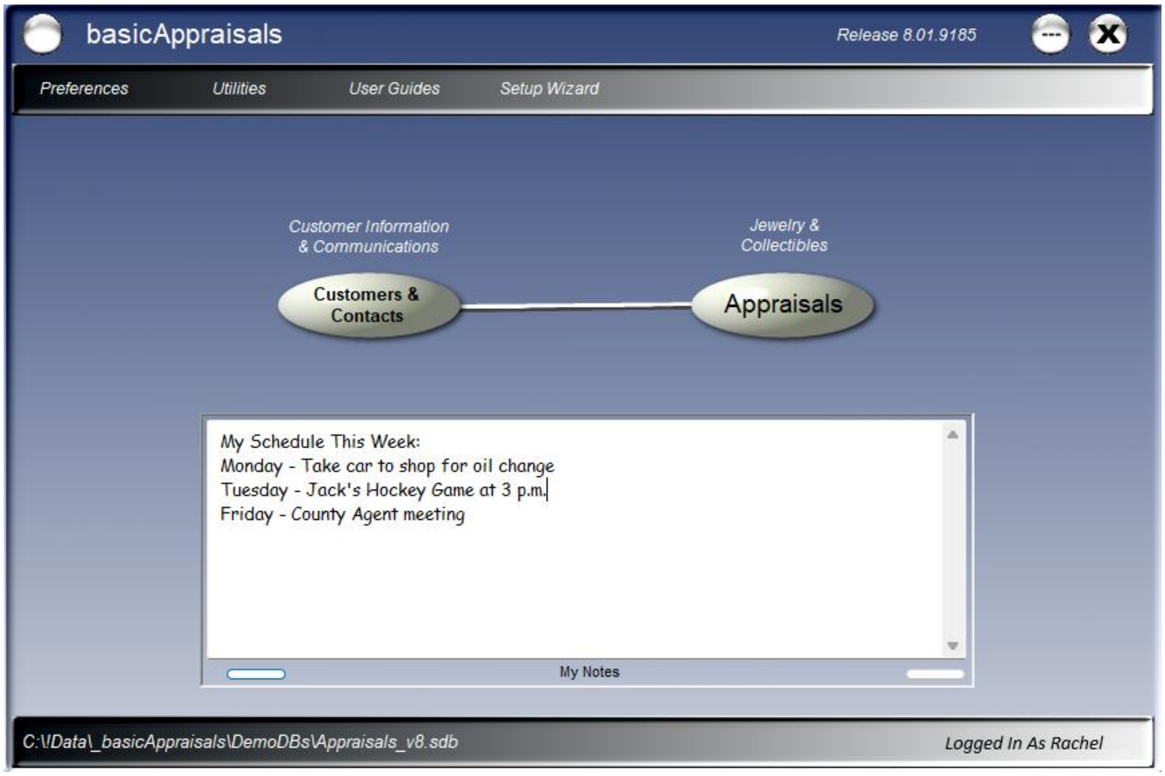

basicAppraisals User Guide

Version 8 – February 2025

Small Business Software Built with Enterprise DNA

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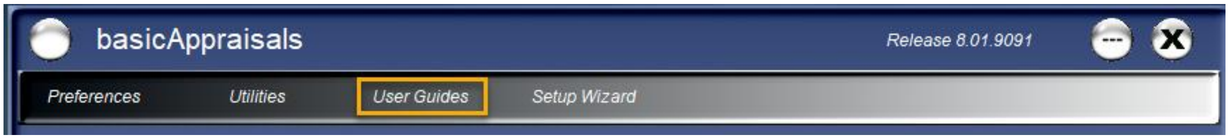
basicAppraisals User Guide

Overview

This guide is a resource for users of basicAppraials software, Version 8.x.

For additional information, click on Main Menu >> User Guides to open our Support site. All user guides and video tutorials are FREE!



What Is basicAppraisals?

basicAppraisals makes it easy to create professional appraisals for jewelry, watches, collectibles and more. Designed for non-techy users, **basicAppraisals** manages customer information and their personal property details in a simple one-page interface.

basicAppraisals is built on the latest Microsoft technology and will install and run on any **Windows 10 or 11** system that meets the basic system requirements (8GB RAM [minimum] and 10MB Hard Drive Space, .NET Framework 4.6.1 or higher.   **NOTE:** **basicAppraisals does not install or run on Macintosh (macOS) systems.**

Additional features include:

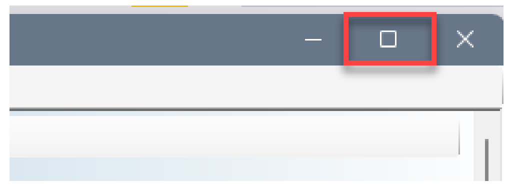
- Streamlined Setup Wizard:
  - Migrate your data from 1-Step Appraisals v5, basic Appraisals v6 or basic Appraisals v7.
  - Add and edit all drop-down list values in one step
- Integrated Report Designer that lets you add an unlimited number of reports to the full library of report designs already in the system.
- Add your business information in one place, including logos, addresses, phone numbers etc., and they'll automatically print on the Appraisal and Invoice reports.
- Integrated full text search lets you find data easily.
- Print reports, labels, charts and calendars. Save charts as images or copy to the Windows clipboard to use in other applications.
- Unlimited file attachments. You can edit files and reattach them with a single button click.
- Multiple database support… no limits on the number of databases you can create: Microsoft SQL Server (for network use, not included); Microsoft SQL Server Express (free download from Microsoft, not included) or SQLite, which is a standalone database included in our products.
- Email integration with Microsoft Outlook (Windows Desktop Versions 2007 or above including Office 365). Just double-click an email address to create a new message.
- Import, Export, Backup & Restore Database utilities
- Users can customize Navigator, page and grid colors, form formats and startup options.
- Use Sticky Notes on-screen just like you would on paper!
- Copy one or more Outlook messages to Contact Notes with a single click!

Getting Started

basicAppraisals Version 8 has a new interface and many new features. If you're a first-time user, you can start adding Customers and Appraisals immediately. If you've used a previous version (1-Step Appraisals v5, basic Appraisals v6 or basic Appraisals v7) use the Setup Wizard to migrate your old data. See the User Guide called **basicAppraisals Installation & Setup** for detailed instructions to do that.

Important Tip: Resizing Forms to Fit Your Screen

The first time any form is opened it adjusts to the screen resolution on your primary screen. However, you may see scrollbars at the bottom or right side of the window, which means the form isn't fully extended. You can do one of two things to ensure that you can see everything on the form:



1. Click the **Maximize** button in the upper right corner of the window, which will increase the form to fill the entire screen, or
2. Hold your mouse over the lower right corner of the window and stretch it until the scroll bars disappear.

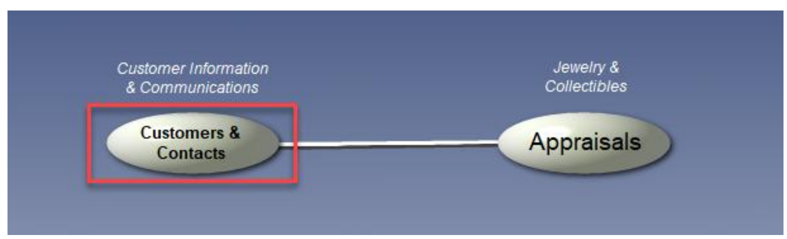
The next time you open the form, it will "remember" your sizing and location choices and reopen it in the same position.

When you're opening forms from a worksheet, such as Contact Notes on the Contact page, or Appraisal Items on Appraisals, use Option #2 above to stretch the form until the scroll bars disappear.

Please refer to the **Phase25 Applications Guide** which explains all of the features of Forms and Worksheets.

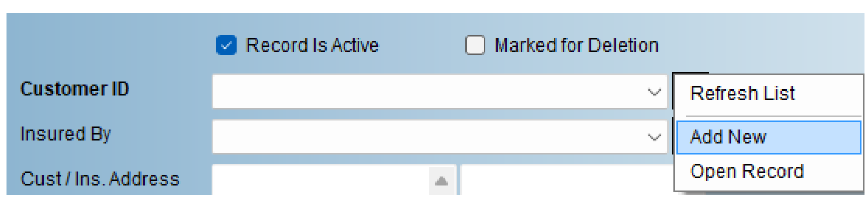
Customers & Contacts

You can enter Customer information in one of two ways. The first is to click the **Customers & Contacts** button on the Main Menu to open the page where all business and people information is stored.



You can start entering data by clicking **New** on the toolbar and filling out the form.

The second way is to add a Customer/Contact record on-the-fly as you create an Appraisal or Valuation record. On both of those pages, there's a button next to the **Customer ID** field which pops up a menu. Click on **Add New** to open a new Contact record and fill out the form with the customer information.



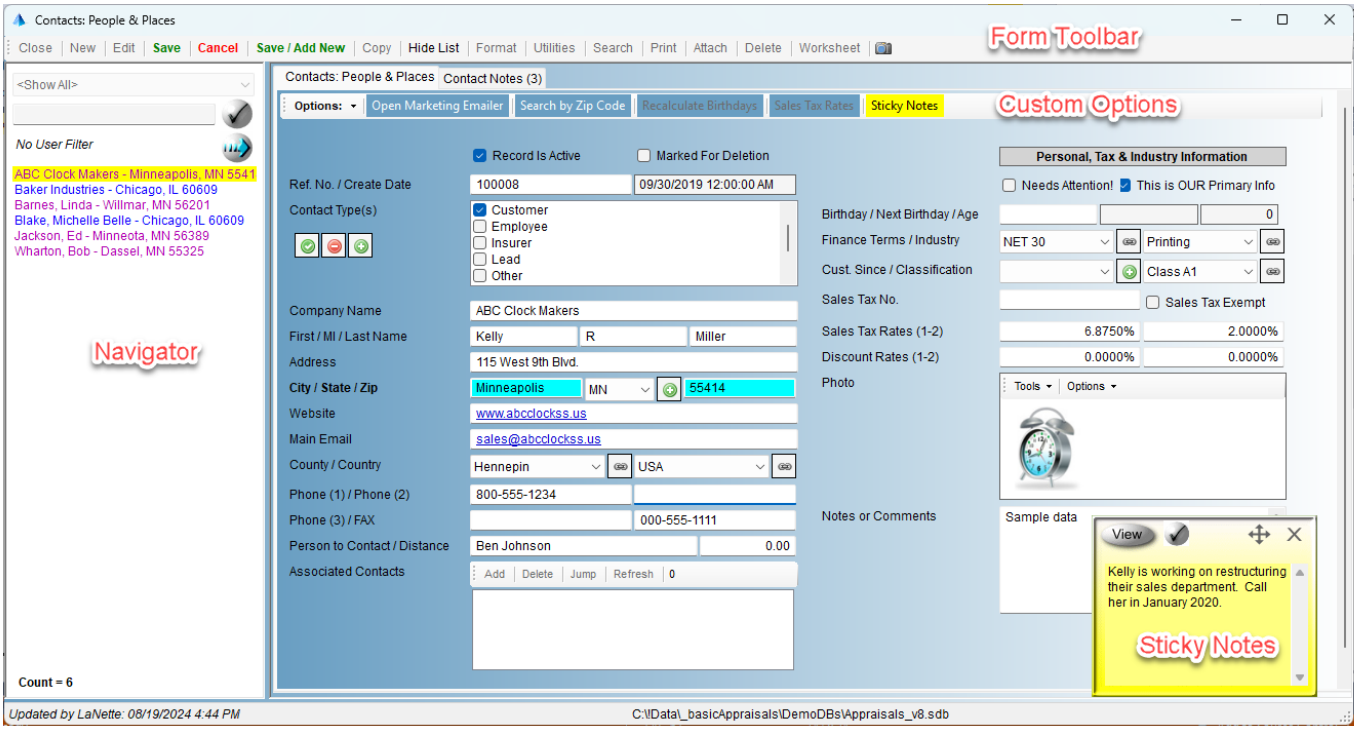
You can also access this menu if you want to change a Customer record (maybe an address change happened since the last contact with them). Just click on **Open Record** to open the Contact record for editing. Make your changes and click **Save** to close the Contacts form.

Whichever method you use to add or edit Contact information, the Contact form works the same way.

The Contacts Form

The **Form Toolbar** is consistent on every page; you can use the buttons and drop-down options on this toolbar to add, edit, delete, print, etc.   Click **New** to create a new empty record on the page, then enter the data in each field. Note that field names in **bold text** are required fields (you have to enter a value in order to save the record). All other fields are optional.

For more information about additional options on the toolbar, see the **Phase25 Applications Guide**.



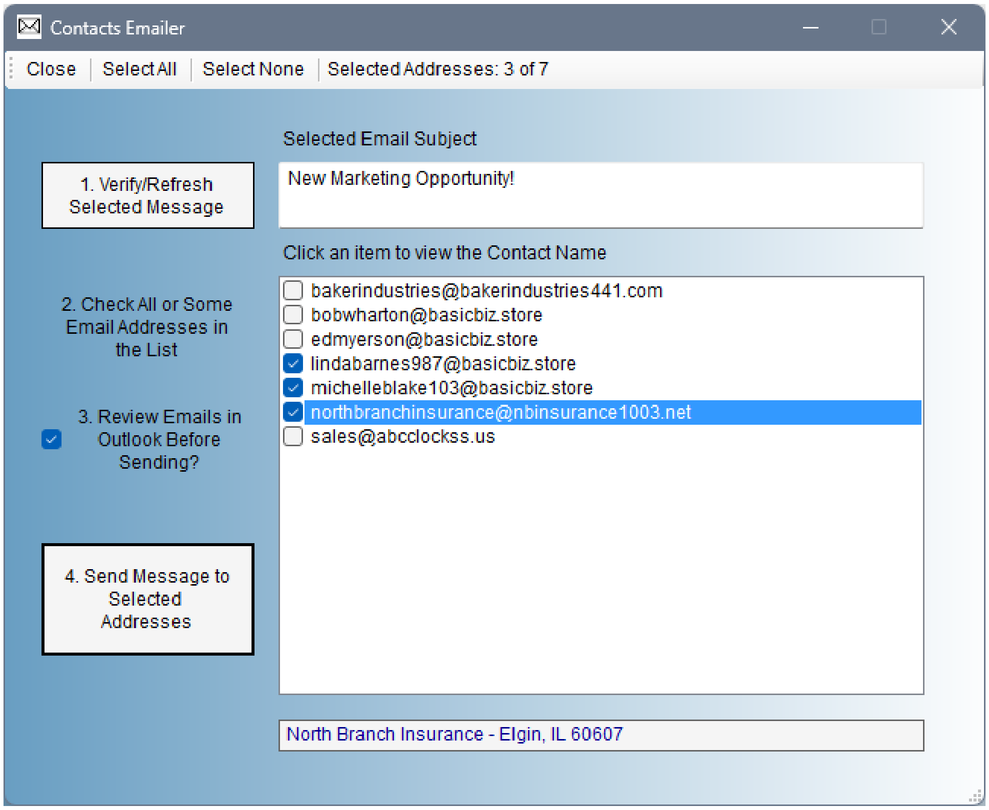
Custom Options

Each form may have custom options or functions that apply to the current data on the page. The Options on the Contacts form are:

- **Open Emailer**
  - This opens the Contacts Emailer which lets you send the same email to one or more recipients via Outlook. You can use this to send flyers to customers to tell them about an upcoming event (sales event, holiday sales, etc.) by constructing one email in Outlook, saving it as a Draft, then selecting it in the Outlook view.
  - Click the **Open Emailer** button to open the form below. The subject in the selected Email (in Outlook) will be displayed in the first field. Click the **1. Verify/Refresh Selected Message** to make sure you have the correct email message.
  - 2. Check all of the customers that you would like this information to be sent to. Each email address will be sent a separate email, so no one will see the other recipients' names.
  - 3. Checking this option will NOT auto-send the emails. Each email will be opened in Outlook, where you can review each one before manually clicking the **Send** button. You may want to only check one or two names to see how the email will look. You can opt to send them or close the emails without sending, then come back to the Emailer, check ALL of the email addresses and UNCHECK

the **Review Emails in Outlook Before Sending** option so that they're automatically sent without review.

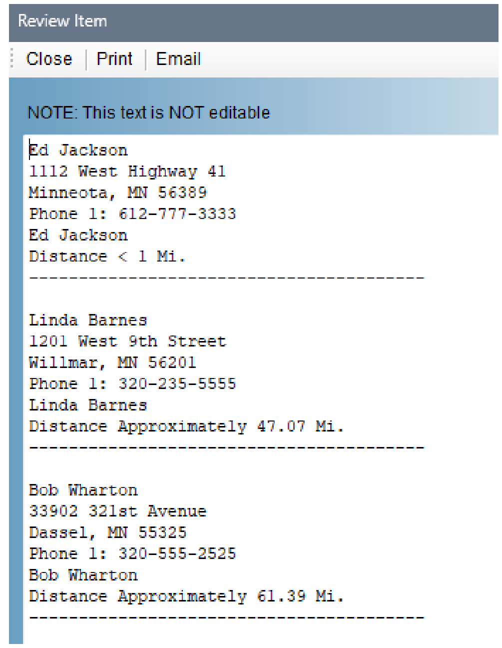
- 4. Click this button when you're ready to view or send the Outlook messages.



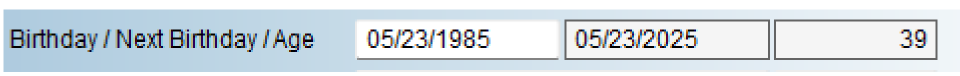
- **Search by Zip Code**
  - This utility will find all Contact records based on their zip code within a **Distance Radius** of a specific zip code. For example, the Zip Code is 56389, and we want to know how many Contacts are within 100 miles of that location:

The results are displayed in a text box, with options to print or email the list. Or you can simply select all of the text in the list and copy them to the Windows Clipboard (Ctrl+C).

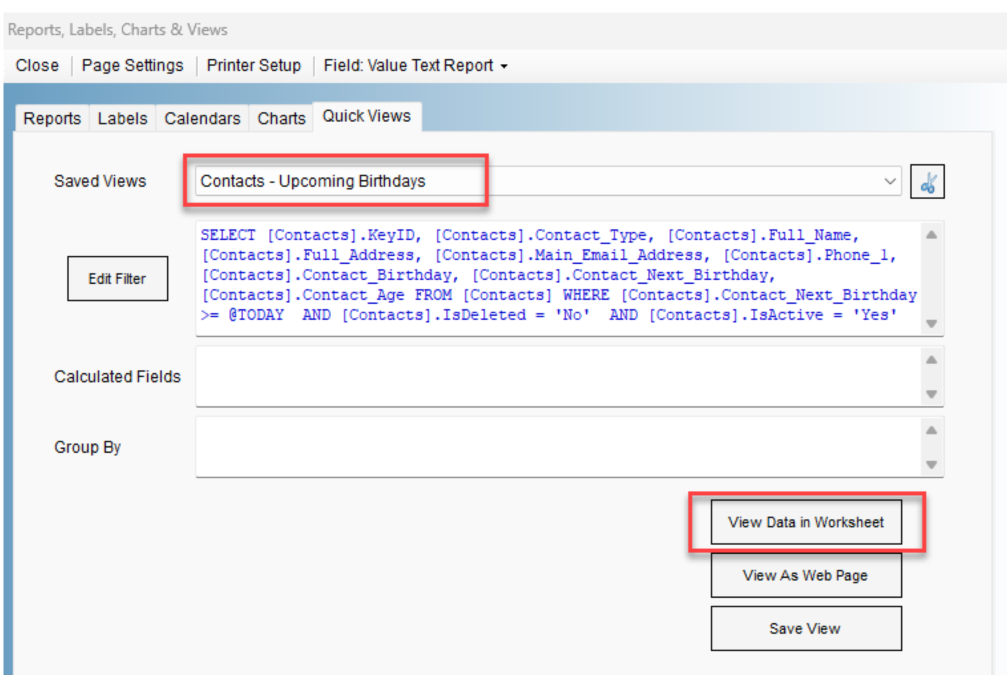
This utility may be useful if your sales team is scheduling on-site visits to call on customers. You can find all of the “stops” within a set number of miles from a specific starting location.



- **Recalculate Birthdays**
  - Each Contact record has a field that stores the contact or Primary Contact’s date of birth, called **Birthday**. Another calculated field, called **Next Birthday**, calculates when the next birthday will occur. This calculation only happens when a Contact record is edited, so those **Next Birthday** dates aren’t always accurate. Click this option to recalculate all records to update the **Next Birthday** field.



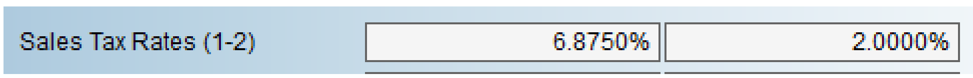
  - When all birthdays are up-to-date, you can view that information:
    - Click on **Print >> Quick Views (Tab)**
    - Choose **Contacts – Upcoming Birthdays** view from the Saved Views list.
    - Click **View Data in Worksheet** to see the results (below).

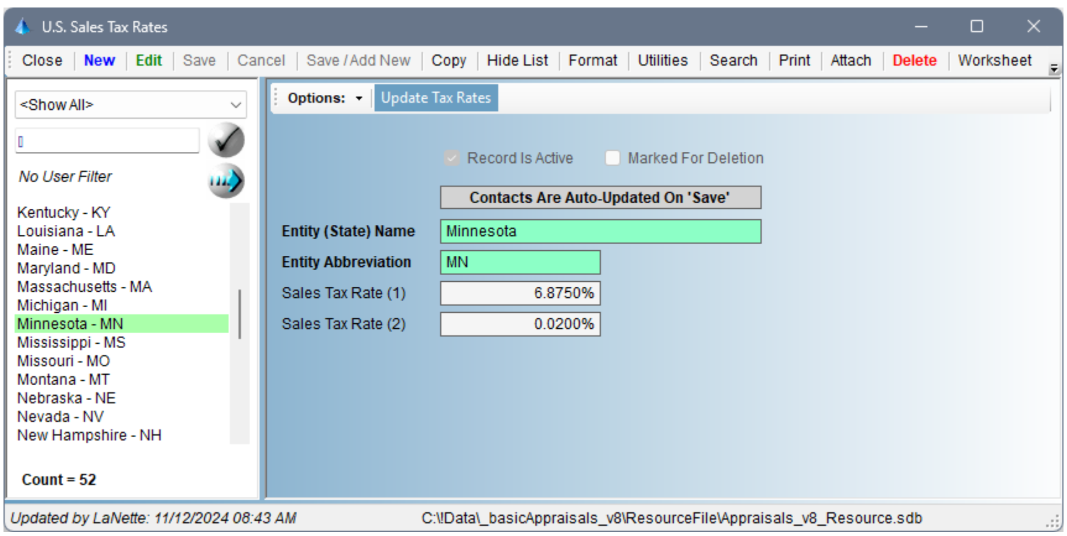


This is the information displayed in the worksheet, with Word Wrap turned on. Also, if you have a default application for opening Bitmap files (.bmp), the application will open it and display it on your desktop.

Contact Type	Full Name	Full Address	Main Email Address	Phone 1	Contact Birthday	Contact Next Birthday	Contact Age
Customer	Ed Jackson	Ed Jackson 1112 West Highway 41 Minneota, MN 56389	edmyerson@basicbiz.store	612-777-3333	07/31/1963	07/31/2025	61
Customer	Linda Barnes	Linda Barnes 1201 West 9th Street Willmar, MN 56201	lindabarnes987@basicbiz.store	320-235-5555	05/23/1985	05/23/2025	39
Customer	Michelle Belle Blake	Michelle Belle Blake 446 125th Street Chicago, IL 60609	michelleblake103@basicbiz.store	320-693-0000	11/03/1987	11/03/2025	37

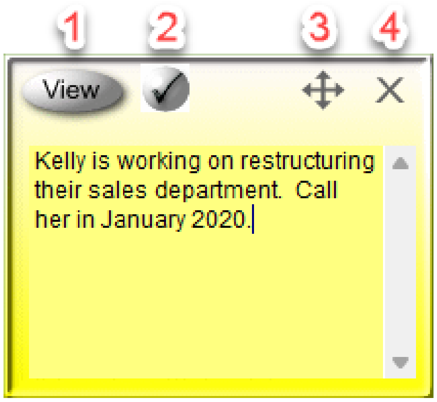
- **Sales Tax Rates**
  - This opens the form that stores Sales Tax Rates for each State in the United States. This table populates the Sales Tax Rates fields on the Contact form when the State is selected.

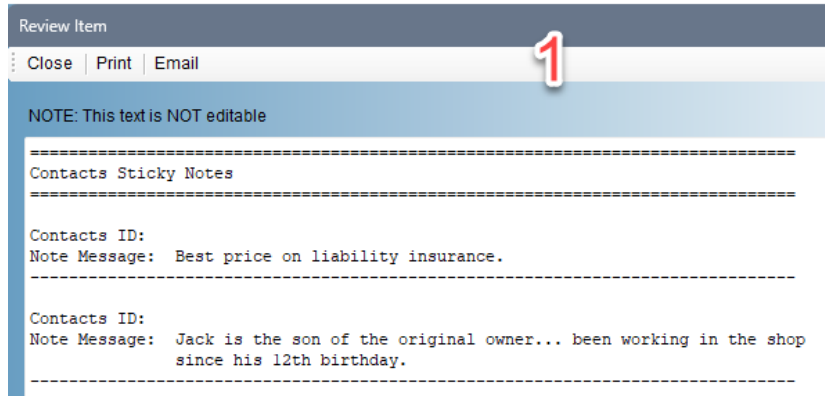




You can click the **Update Tax Rates** option on the Sales Tax Rates form to automatically update all Contacts in the same State (as displayed on the Sales Tax Rates form). Use this if you change the rate in either Rate field.

- **Sticky Notes**
  - The Yellow Sticky Note button opens the Sticky Note for the selected Contact. When you click on a different Contact in the Navigator, the note displays the information for THAT Contact record.
  - Adding a Sticky Note to a Contact FOLLOWS the Contact through the system. For example, the Sticky Note for Kelly (below) will also be displayed on Appraisals and Valuations when that Contact is the customer on the form.   You can edit the information when it's displayed, and it automatically is saved.
    - 1. Click the **View** button to view all Notes in a memo form.
    - 2. Click the "check" button to change the Font in the notes.
    - 3. The Note can be moved anywhere on your desktop by holding your mouse down on the 4-arrow button and moving the form.
    - 4. Click this button to close the Sticky Note.

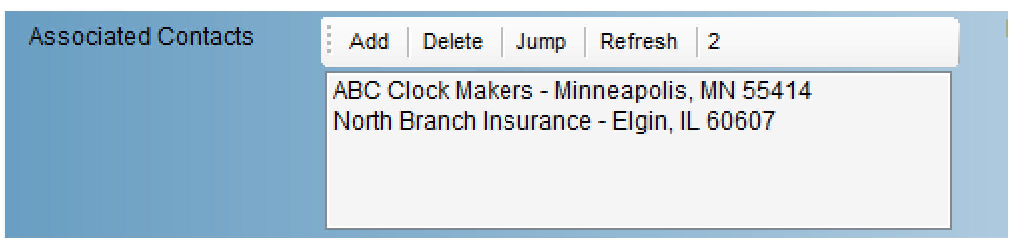




Associated Contacts

The field called **Associated Contacts** stores links between two or more Contacts that are connected in some way. For example, you may have a contact record for a Company, and another contact record for people who work within that company. After entering both records, on either one, click the **Add** button on this field and select the related record. Each record will display the linked record's name. Double-click on the name or select it and click on **Jump** to quickly select that record on the page.

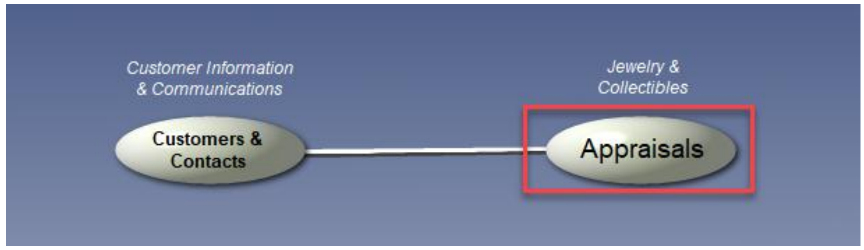
Each record can have unlimited links. If you want to remove a link between two records, just select the name and click **Delete**. Both linked records will be cleared of the linkage.



Working With Appraisals

Click the **Appraisals** button on the Main Menu to open the Appraisals page.

When you open the page, the data is displayed in a master-detail (or one-to-many) format, where the general information for each Appraisal (customer, insurer, etc.) is on the top, and the details, the individual items being appraised, are in a Data Grid on the bottom.

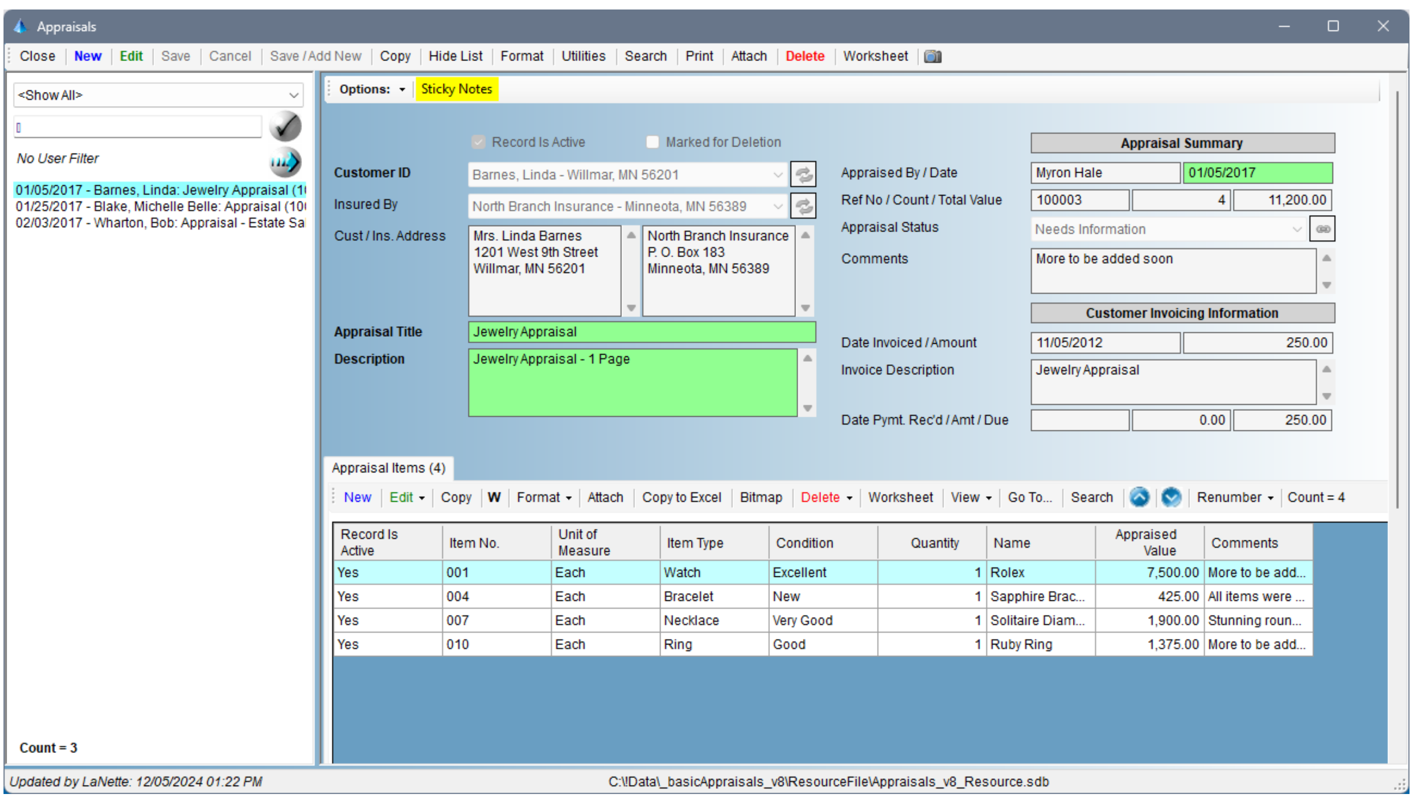


This layout is called **Tabs On Bottom**, and can be changed by clicking the **Format** button on the Form Toolbar and choosing **Tabs on Top** or **Full Page (No Tabs)**. Either choice will reload the page with the new format.

See the **Phase25 Applications Guide** for this and the other Format options on this menu.

Move and resize the window to best fit your monitor's screen resolution capabilities. You can drag any side of the window to change the height and width, or simply double-click on the Window caption bar, next to the "Appraisals" caption) to maximize it to fill in your entire desktop.

You can also drag the divider on the right side of the Navigator to adjust the width of it.



Please note that you only have to resize each form or set the Page format once. After that, each time you open the page, the form will "remember" where they were the last time you used them. This applies to all forms and grids in the system.

Creating A New Appraisal

Click **New** on the Form Toolbar to create a new empty record on the page. Follow the steps below to create a new Appraisal.

Field Name	Required?	Do This
Customer ID	Yes	If you've already added your customers, simply select the customer name from the drop-down list. Or, you can add a new customer by clicking the green arrows button on the right and choosing **Add New**. A new Customer/Contact record will be displayed; check **Customer** in the Contact Type list and enter the additional information and click **Save** to add the Contact to the drop-down list.
Insured By	No	This works the same as the Customer ID field except the list contains only those contacts where the Contact Type **Insurer** has been checked on the Contact record.
Customer Address	No	This is automatically filled in when you choose a Customer name.
Insurer Address	No	This is automatically filled in when you choose an Insurer name.
Appraisal Title	Yes	Enter a meaningful title for this appraisal. For example, "Anderson Family Estate Appraisal", or something that makes sense. This will be displayed at the top of the printed/emailed appraisal.
Appraisal Description	Yes	Enter a short description; this will also be used on the final printed/emailed Appraisal form.
Appraised By	No	This should show the name of who is actually doing the Appraisal. If this is the same for every appraisal, enter the name, then right-click on the field and set it as the "Default", which will auto-fill the next time you add a new appraisal.
Appraisal Date	Yes	This defaults to "today's" date, but you can double-click in the field to choose a different date, or simply enter a new date.
Ref(erence) No.	No	This field is automatically filled each time a new appraisal is created and is not editable. This lets you identify an appraisal as each of the numbers will always be unique.
Count	No	This is a non-editable calculated field that will update and show the number of items each time you add an Appraisal Item.
Total Value	No	This is a non-editable calculated field that will update and show the Total Value of all of the items each time you add an Appraisal Item.
Appraisal Status	No	This defaults to **Not Started** on new Appraisals, and you can change the status as you edit the items. This field is one of the **Filter Fields** on the Navigator, which can be used to show only Appraisals in a certain state of completion. To filter the Navigator, change the **<Show All>** value to one of the filter fields, then select the value of that field. Only those records that match will be displayed in the Navigator.
Comments	No	Enter any notes you want to keep regarding this invoice, which will be included on the Appraisal.
Date Invoiced	No	If you want to send an Invoice to this customer for the Appraisal, add the date here (or double-click to choose a date from the calendar). One of the **Print > Reports** options is to print a Customer Invoice.
Amount	No	This is the amount you're billing the customer, which will also be used on the **Customer Invoice** report.
Invoice Description	No	The description of the Appraisal when invoicing the Customer.
Date Pymt. Rec'd	No	When the customer pays the Invoice, enter the Date of Payment here.
Amt (Amount)	No	When the invoice is paid, enter the Amount here.
Due	No	The unpaid amount of the invoice (calculated, not editable)

Click **Save** on the toolbar to save all of this information. Now you have the Appraisal record created and can add the individual jewelry items to the worksheet.

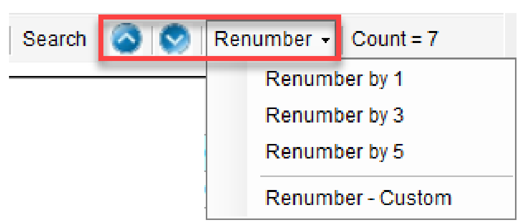
Adding Items to the Appraisal

Click **New** on the Form Toolbar to create a new empty record on the page. Follow the steps below to add each item being appraised to the Appraisal.

Field Name	Required?	Do This
Appraisal	Yes	This will automatically be filled in and will display the name of the Appraisal. The text in this field "links" this item to the Appraisal. If you wanted to move the item to a different appraisal, you could simply select the other appraisal in the list and save the record.
Item No.	Yes	This number is auto-generated each time an item is added and determines what order the items are displayed on the final Appraisal. See the note below for a quick tip on how to reorder the items on the Worksheet.
Unit of Measure	No	This relates to the **Quantity** field; for an item for which there is only one (a ring, a bracelet, etc.), choose **Each**. If these are earrings, for example, choose **Pair**. Then adding **1** in the **Quantity** field makes sense.
Item Type	No	What is the item? A ring, a bracelet, ???
Condition	No	What condition is this item… new, excellent, good, poor, etc.
Quantity	Yes	How many items are included in the value.
Name	Yes	A short discription of the item: "Diamond Bracelet", "Ruby Ring"
Description	No	The complete description of the item and what it entails. This field will store unlimited text, so you can enter the grade, size of the stones, etc. in full detail here.
Appraised Value	No	Enter the appraised value.
Comments	No	Add any other comments not already included in the description.
Image (1) & Image (2)	No	Click the **Tools** button and add an image of the piece by selecting an image file from your computer, from a connected scanner or camera or a picture you've copied to the Windows clipboard. See the **Editing Images** section below, which describes how to modify these images for the best display results.

After each item is entered, click **Save & Close** on the toolbar to save it, close the form and see it displayed in the Worksheet. The **Count** and **Total Values** on the Appraisal will automatically be updated based on the information entered on each item record.

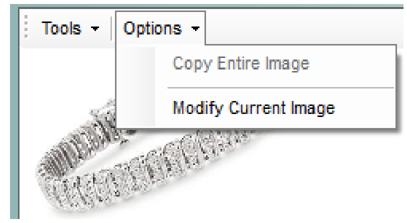
Quick Tip: You can change the order of the items in the Worksheet (which is the order they will be displayed when printing or PDF-ing the appraisal by using the **Move Up** or **Move Down** buttons on the worksheet toolbar. Just select one of the rows in the worksheet, then click the button to change the **Item No.** value, which also re-sorts the entries in the worksheet.



You can also automatically renumber all of the entries in a worksheet by clicking on **Renumber**, then choosing the "gap" between the **Item No.** numbers.

Editing Images

The Image field has a set of utilities on the **Options** button that lets you edit an image added to the appraisal. These utilities are available on any form where you see this image control (such as on the Contacts/Customer form).

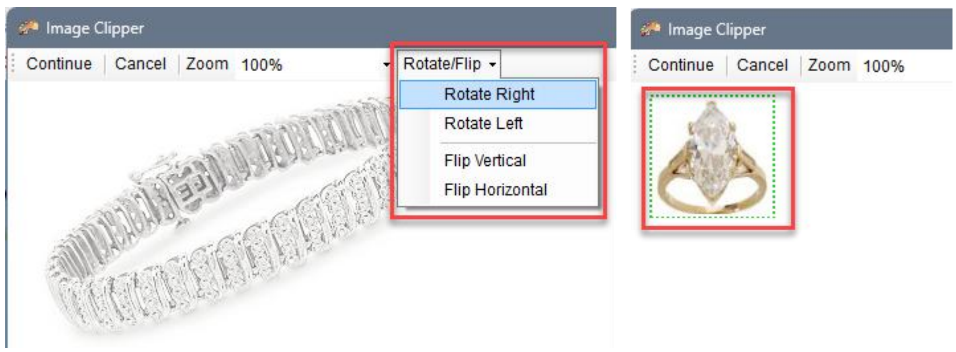


Click on the **Options** button on the toolbar to open the menu.

Copy Entire Image – Click this to copy the current image to the Windows clipboard. Once on the clipboard, you can paste it into any other application on your computer (Ctrl+V).

Modify Current Image – This opens a window that displays the entire image. Use the **Rotate/Flip** options to Rotate the image Right or Left, or Flip it vertically or horizontally. Or if you have a lot of white space around the actual piece of jewelry, which can happen when you take digital photos, hold your mouse down and draw a green-dotted box around just the piece you want to keep.

Click **Continue** to update the Image field with your changes.

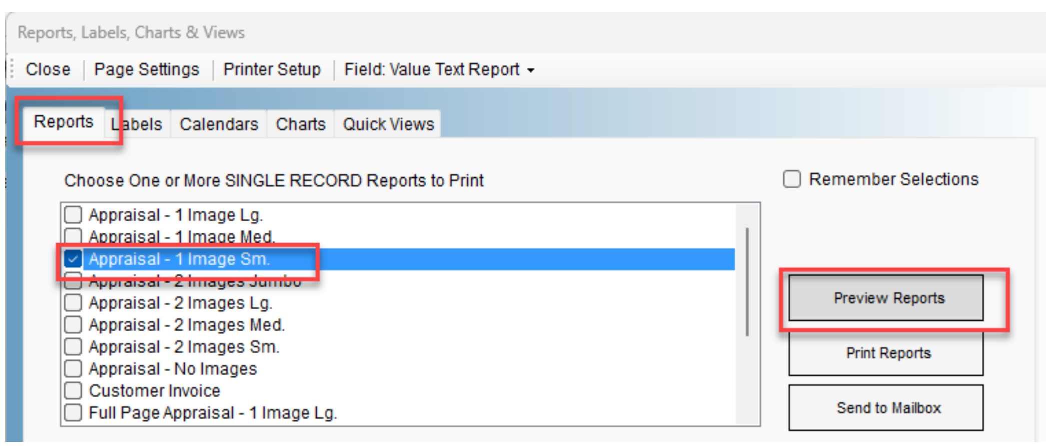


Resizing & Cropping Images

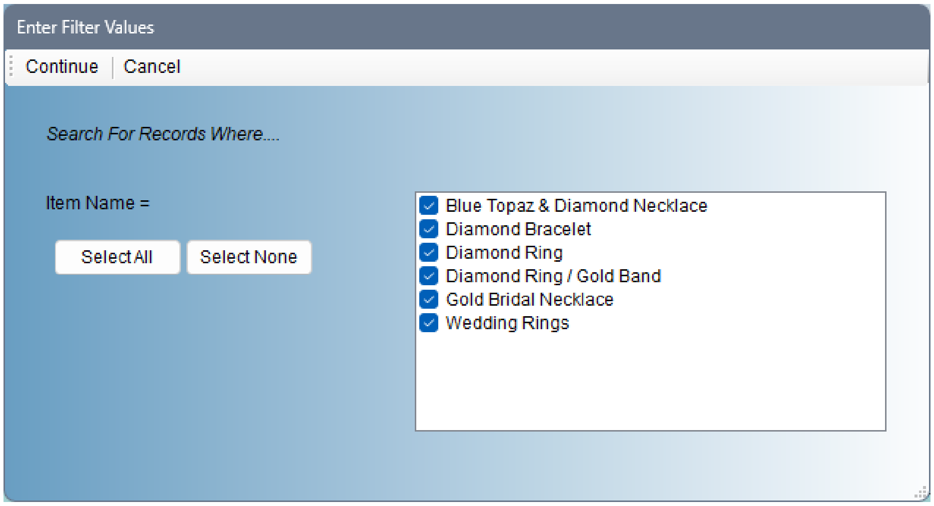
When you take digital pictures, those images can be quite large in size, which takes up a lot of space in your database. When you open the image in the **Image Clipper** and not all of the image "fits" in the window, use the **Zoom** option to show the entire image and then draw the box around the part you want to keep. Not only does that greatly reduce the size of the image when written to the database, but it also presents a better picture on the printed Appraisal.

Printing or Emailing The Appraisal

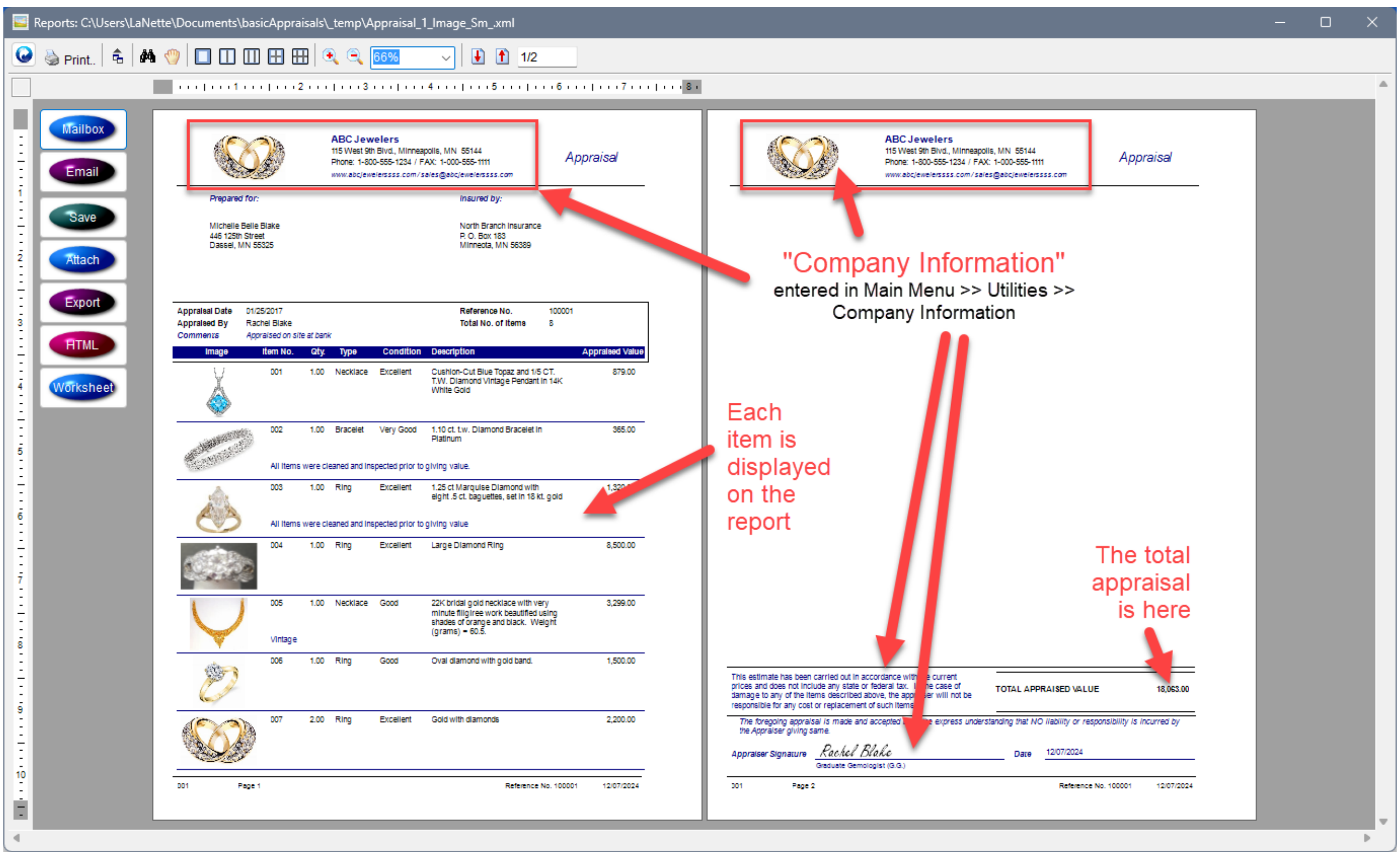
Great! Your appraisal is complete and it's time to see the results. Click **Print** on the Appraisal Form Toolbar, then on the **Reports** tab choose one of the Report templates in the first list (for SINGLE RECORD Reports). This will print just the Appraisal you are viewing on the page. Click **Preview Reports** to display the report in the Print Preview window.



The next dialog will prompt you to select all or some of the Appraisal Items to include in the printed copy. Use the **Select All** or **Select None** buttons, or individually check the items you want to print.



Click **Continue** to show the report.



Click **Print** on the Print Preview toolbar to send the report to your printer. Or use one of the options in the vertical toolbar at the left to create a PDF report and send it to the **Mailbox**, or attach in an **Email** (if you're using Outlook), or to **Save** to your computer.

System & User Requirements

Phase25 Software (Phase25, LLC) products are designed to be straightforward and easy to use, with minimal administration by the customer, both on a hardware and software level. We strive to quickly resolve any and all issues regarding installation, performance and daily usage; however following these standard Requirements must be met before we can effectively do so.

General User Requirements

- Users must have an overall general understanding of how to use a computer, including but not limited to*:
  - Basic Windows skills, such as copy/paste functions and file & folder navigation in Windows Explorer
  - General Outlook email familiarity to adjust personal settings (Outlook Rules & Alerts & Mail Account settings)

User (Workstation) Hardware Requirements

- Operating Systems: Windows 10, Windows 11 (please make sure all updates and service packs are applied regularly)
- MINIMUM 8GB RAM (12GB+ Suggested). More RAM results in better performance.
- 10MB Hard Drive Space for setup and installation; additional storage required for database
- Video Resolution Minimum of 1280 x 800 (100% Resolution); settings that vary from the default proportions for your system may cause some pages to appear distorted
- Microsoft Outlook 2016 or Office 365 (for email integration & user-to-user Replication)
- High-Speed Internet Connection (for updates, remote support & user-to-user Replication)
- Other computer hardware less than 3 years old.

NOTE: All single-user licensed applications store data in a SQLite database, which is a standalone database engine widely deployed in web browsers, operating systems mobile phones and desktop systems. This database type is called *zero-conf*, which means it needs no administrative services.

Enterprise Software Requirements

Enterprise versions support multiple users by adding features such as SQL Server / SQL Server Express integration. Contact support for pricing and additional information at www.phase25.com.

For multiple user customers, we require that **one person** from within your company be designated as the Contact Person for exchanging information about updates, support issues, and any other communication with Phase25 Software regarding the training, installation and general daily operations of the software product. We do not support each user on a one-to-one basis in multi-user situations; the Contact Person within the company is responsible for mitigating on-site issues and communicating those personally to the support staff at Phase25 Software and then reporting any resolutions, update notices, etc., to the licensed users within the company.

- Supported Database Platforms (Enterprise)
  - Microsoft SQL Server 2016 or above - requires SQL Server installed and operating on a company network and is NOT included in our software packaging, installations or pricing.
  - Microsoft SQL Server EXPRESS 2014 - requires SQL Server Express 2014, which is a free product available from Microsoft's website (https://www.microsoft.com/en-US/download/details.aspx?id=42299).
  - We recommend downloading and installing the SQL Server Management Studio 2014 (free) to facilitate setting up the application login and password required by our software. Please refer to Microsoft documentation for system requirements for their products.*
- Replication Requirements (Enterprise)
  - Microsoft Outlook 2016 or above or Office 365
  - High-Speed Internet Connection
  - For Replicator Server Utilities - Windows Server NOT required (Replicator can run on a workstation); however the workstation should be an up-to-date computer with a minimum of 16GB of RAM to efficiently process replication packages for client systems.

*We provide instructions for setting up an application role login and password on SQL servers, however, we do not support the overall operations of any SQL Server products as that is the responsibility of the vendor from which it was purchased.

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