QUICK START · HOW-TO 19

Your workfile: what travels, and how

The packet, your papers and your comp photos, into your workfile.

1. **Find it**
   Bottom of your report, just above the export: Save for your workfile.

2. **What rides into TOTAL on its own**
   When you export to TOTAL: the engagement letter and contract you dropped under What you have (every counteroffer too), your listing sheet and comp sheets as you dropped them, each comp's filed photos, and with a market search, the search file and both market pages.

3. **The AO-41 Workfile Packet: save it**
   The one page that does not ride on its own. Save it last, when the report is done. Tap AO-41 Workfile Packet, tap Save as PDF, choose Save as PDF as the printer, and save it.

4. **Add it back**
   Tap Back to your report. In Your documents, tap + Add and pick the PDF. Now it rides your export into TOTAL's workfile.

5. **Anything else for your file**
   A tax card, plat map, flood map or last listing: + Add takes PDFs, pictures, Word and text files, several at once. A page for the report itself is + Add Subject Exhibit, in Subject Property.

6. **Your comp photos**
   Drop your comp export with its photo pages or gallery on the Comp sheet spot, the day you pull your comps. The file stays unchanged, so the whole gallery is kept. Each comp gets its front photo, and up to two kitchen, two bath and one living room photo filed under it with its MLS number. Virtually staged photos are left out.

7. **In TOTAL**
   Select the report on your Appraisal Desktop and click the Workfile tab. Double-click a file to open it. Added something after you exported? Add, then File on Computer.

8. **On Appraise-It Pro**
   Its file carries your report and photos only. Tap Download Photos & Documents for one ZIP: Photos, a Workfile folder (your documents and the MLS files you dropped) and Comp Photos, one folder per comp. Save the packet and market pages as PDFs, and keep it all with your workfile.

> **WHAT TRIPS PEOPLE UP**
> Saving the packet is not enough: + Add it to Your documents before you export. And drop your comp export with its photos the day you pull your comps; next month those photos may not be public.

USPAP Record Keeping Rule (as quoted in AO-41, lines 338 to 342); ASB USPAP Q&A 2017-17 (keep it at least five years after preparation). TOTAL: a la mode help, Workfile tab and Workfile PowerView.