

How to Electronically Deliver your Appraisal Report

By: Brian Hiatt

Collectorpro Software Inc.

Revised June 28, 2016

Overview

Many appraisers are asking how to electronically deliver appraisal reports to their clients. With paper and ink costs continuing to rise, delivering reports electronically is more attractive, faster, and easier for the client and the appraiser.

The ability to add an electronic signature to the appraisal report is a feature of Collectorpro released in April 2009.

What do you need to deliver reports electronically?

- A PDF printer installed on your computer.
- A scanned image of your signature.

There are many PDF printers available. Some are free, others are not. Most free PDF printers deliver advertising to your computer when you print to a PDF format. We have had very good success with the following PDF printers.

SodaPDF – www.sodapdf.com

This PDF printer is the fastest we have tested, easy to use, and free. Plus no advertising is displayed when you use it.

CutePDF Writer - www.cutepdf.com

This free PDF printer is fast, easy to use, and free. Plus no advertising is displayed when you use it. In addition they have an inexpensive PDF management software (was \$49) that allows the appraiser to combine multiple PDF's, edit, protect, and save PDF's.

PrimoPDF – www.primopdf.com

This free PDF printer is fast, easy to use, and free. Plus no advertising is displayed when you use it. In addition they have an inexpensive PDF management software (was \$99) that allows the appraiser to combine multiple PDF's, edit, encrypt and save PDF's.

Adobe Acrobat Standard – www.adobe.com

This is the most powerful PDF creation and management tool available. While it is not free, (Various monthly fees), this is the best way to create and manage PDF files.

How to create an electronic appraisal report in Collectorpro?

Once you have your chosen PDF printer installed and working, you can follow the steps below to create an electronic appraisal report.

Step by Step Instructions

- ❖ Create and appraisal as you normally would.
- ❖ Attach your electronic signature
 - Click on Cover Docs – E- Signature

- Click on the Select signature graphic for e-signature report section, locate the signature image file and click the OK button to attach the signature to Collectorpro
- ❖ Enter any signature disclaimer you wish
 - Click in the box above the signature graphic Enter the E-signature Disclaimer Enter any text you wish. This will print below the electronic signature on the certification section of the report.
- ❖ Select Create Report Tab
 - Under Choose Report Sections
 - Check Include transmittal report section
 - Check the box labeled “Print electronic signature in certification section”
- ❖ Print the report to a PDF file
 - Select the PDF printer as your default printer in Windows
 - On the left side under the Appraisal Reporting Dashboard you will see the Current settings, there is where you Current Default Printer is set to
 - Click on Display/Print Appraisal Report
 - Click on the Select Printer button
 - Right click on the PDF printer and left click on Set as Default
 - Click on the X to close the printers window
 - Click on the Print/Display Appraisal Report button
 - Set the report date
 - Click on the OK button to preview the report
 - In the report preview, click on the Print icon on the toolbar
 - In the Windows print dialog box, your PDF printer will be selected. Click on the Print button
 - The PDF printer will prompt you for a name for the PDF file. Navigate to the folder on your computer where you wish to save this report, enter the name and click the OK, Print or Continue button. This will print the entire report to a PDF file in the folder you specified.
- ❖ View the report
 - If you have Adobe Acrobat Reader (free) installed the report will open automatically. If the PDF file does not open automatically, you can use Windows to navigate to the PDF file and double click on the file to open it
 - You can get the free Adobe Acrobat Reader at www.adobe.com
- ❖ Email the report
 - Email the PDF as an attachment as you would any other email attachment
- ❖ Send the report
 - Because email has attachment size limitations that vary by email server, many appraisers use Dropbox or OneDrive to send the PDF file to their clients.