

## **Collectorpro Glossary**

### **Overview**

The Glossary feature builds a custom glossary for each appraisal based on words or phrases found in the content of the appraisal.

### **How Does It Work?**

The appraiser builds a glossary library. When the appraisal is complete, the appraiser uses the Build Glossary function in Collectorpro to build the custom glossary. The appraiser can then view or change the custom glossary in the event this is needed.

### **Building the Glossary Library**

The glossary library is a repository of glossary entries that are available to all appraisals. To build the glossary library, click on Setup – Setup Glossary Library from the menu bar at the top.

Glossary library entries are made up of three fields of information.

- Library Type – This is the type of glossary entry and is used to group the entries together in the glossary section of the report. Examples are Furniture Glossary, Glassware Glossary, Art Glossary.
- Term – This is the actual term that you wish to define in the glossary.
- Definition – This is the definition of the term.

From the Setup Glossary Library screen, you click the Add button at the bottom. If the Glossary type is already setup it will appear in the drop-down list. If not, see below how to add glossary types. Select the type from the drop-down list, enter the term and the definition. Click Save when done.

To add a Glossary type when in the Setup glossary library click the Add Type button, then click the Add button. Enter the type and click save.

### **Building the Glossary**

To build the custom glossary for an appraisal, open the appraisal and click on Client/Appraisal Information on the toolbar. Then click the Glossary/Addendum/Bibliography/Resources tab at the bottom of the client screen. Then click the “Build Glossary” button near the top of the screen. If you wish to search the appraisal certification also, check the “Search Appraiser Certification” checkbox. Then click “Build Glossary”. The glossary will be created and a message box will let you know when complete.

When you build a glossary, Collectorpro will search every field and compare that to every glossary term (see above) that you created in the glossary library. If

there is a match, that library entry will be added to this appraisal's glossary. All found glossary entries will be grouped by glossary type and term and sorted alphabetically.

### **Manually Adding Entries**

If you wish to add a glossary entry that was not automatically created, open the Client/Appraisal screen and click the Glossary/Addendum/Bibliography/Resources tab at the bottom of the client screen. Click the "Click here to Add or Edit Glossary Entries for this Appraisal" button. On this screen you can add entries, modify existing automatically created entries, or delete entries. We recommend you do this after the last build of the glossary so as not to overwrite changes you manually made.

### **Preview the Glossary**

If you wish to preview the glossary that was automatically created, open the Client/Appraisal screen and click the Glossary/Addendum/Bibliography/Resources tab at the bottom of the client screen. Then click the "Click here to View the Glossary" button. A preview of the glossary section of the report will be displayed.

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