CHECKLIST · START TO FINISH

One report, the whole day

Keep this on your phone or by your keyboard. The walkthrough video goes step by step.

BEFORE YOU GO AT YOUR DESK, WHEN THE ORDER COMES IN

- [ ] **Click New** at the top. Drop the **engagement letter** on its spot, and the **MLS listing sheet** on the spot next to it.
- [ ] When they're read, click **Use this address**. The report is started.

AT THE HOUSE YOUR PHONE, OR YOUR CLIPBOARD AND CAMERA

- [ ] **Open your report:** tap the three lines, top right, and tap it. Didn't start one? Tap **New**, open Subject Property, type the address.
- [ ] **Take them now** on the Photos spot. **Turn your phone sideways** for the full view. Tap a label or **Skip**: **you don't have to label**, the intern labels every photo.
- [ ] After each photo, **tap the microphone** and say what the camera can't show.
- [ ] Get the **required photos**: a street scene, the front, every kitchen, every bathroom, and the main living areas, every bedroom too. Then tap **Done**.
- [ ] **The sketch:** walk it on your phone (**Start sketch**, type each wall's length, tap its arrow), or draw it on your clipboard and enter it at your desk.

BACK AT YOUR DESK ON YOUR COMPUTER

- [ ] **Open the same report.** If it was already open, **reload the page** first.
- [ ] **Your own camera?** Drop all your photos on the **Photos** spot.
- [ ] **Comps:** export your comparable sales from your MLS (a PDF up to 25 MB, or a CSV) and drop it on the **Comp sheet** spot. A **Low** chip is amber: check that whole card.
- [ ] **A purchase?** Drop the contract (up to five files) on **Purchase contract**, then click **Analyze Contract**. Not a purchase? **Skip it**.
- [ ] **Market:** search your market area in your MLS (sold, plus active and pending), export the single-line grid as a CSV, and drop it on **Market search**. Remove any odd sales, and type why.
- [ ] **The proof: Put this chart in the report**, **Show me the map**, **Print the Market Conditions page**, **Pick your adjustments**. You pick every number.
- [ ] Open the Photos section, click **Analyze my photos**. In **PhotoPilot**, click **Keep all**, or click one to change it.
- [ ] **Work down the left panel**, top to bottom. Dark ink is your paperwork. Teal is a draft: **Keep** it, or fix it. A blank is yours.
- [ ] **The grid:** Sales Comparison Approach, answer Yes. Fill blanks with **Fill across** or **Same as subject**. Type your adjustments, pick **Most**, **Less** or **No Weight**, and type your value.

THE FINISH OUT TO TOTAL

- [ ] **QC Shield:** click **Take me there** on each one. Then **Export to TOTAL**. If Before you export opens, keep your last drafts, or export anyway.
- [ ] **Double-click the file.** TOTAL opens your report. Finish what it flags, review it, and sign it in TOTAL.
- [ ] **Your workfile:** your paperwork, comp photos and market pages ride into TOTAL's workfile. Save the **AO-41 Workfile Packet** last, from **Save for your workfile**.

> **ALWAYS YOURS**
>
> Your ratings, highest and best use, your adjustments, your weights and your value. AppraisalPilot never fills them in. Every teal answer is a draft until you keep it.

Required photos: Fannie Mae and Freddie Mac, UAD 3.6 Job Aid: Photo and Image Requirements, v1.0, June 23, 2026. Required Photos, p. 1 ("If a required photo is missing, the report is considered incomplete."); Site, p. 2; Dwelling Exterior, p. 3; Unit Interior, pp. 3 to 4. TOTAL opens the file once you have AppraisalPilot from the TOTAL Store on your TOTAL login. Stuck? Open the menu and tap Email us.