

WEB APPRAISE USER MANUAL

Fill out the “I do not have an account form then click on Register”.

Web Appraise - Windows Internet Explorer
http://appraisenj.com/webappraisexis/Login.aspx

File Edit View Favorites Tools Help

Web Appraise

I do not have an account

This email is already registered. Please call 1-201-784-8500 x 107 for technical support.

Full Name	<input type="text"/>
Company Name	<input type="text"/>
Address 1	<input type="text"/>
Address 2	<input type="text"/>
City	<input type="text"/>
State	<input type="text"/>
Zip	<input type="text"/>
Email	<input type="text"/>
Re Type Email	<input type="text"/>
Password	<input type="text"/>
Re Type Password	<input type="text"/>
Phone	<input type="text"/>
Fax	<input type="text"/>
Sales Code(Optional)	<input type="text"/>

Register

Done Internet | Protected Mode: Off 100%

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 Global Securities Valuations and Cost Basis Calculations.
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Valuation Date:
 Valuation Type:
 Estate/Portfolio Name:
 Cusip/Ticker/Sedol: [Issue Lookup](#)
 Shares/Par Value:

#	TOOLS	CUSIP/ TICKER/ SEDOL	SHARES/ PAR VALUE	DESCRIPTION	VALID ENTRY	FOREIGN SURCHARGE	CMO SURCHARGE	BASIC CHARGE	TOTAL ISSUE CHARGE
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Enter the valuation date, valuation type, & Estate/Portfolio Name. Next, enter the CUSIP/Ticker/Sedol number. If you do not have an identifier you can click on Issue Lookup to search for the CUSIP number. When finished click on Add.

If the identifier is valid a description of the security will appear in the form and a green circle will appear in the valid entry column. If the identifier is invalid you will receive a message that the security is invalid. A red circle will appear in the valid entry column.

Continue adding securities in this manner until complete. To change the share values for a security, select Edit from the tools column.

#	TOOLS	CUSIP/ TICKER/ SEDOL	SHARES/ PAR VALUE	DESCRIPTION	VALID ENTRY	FOREIGN SURCHARGE	CMO SURCHARGE	BASIC CHARGE	TOTAL ISSUE CHARGE
1	<input type="button" value="Delete"/> <input type="button" value="Edit"/>	FB	5.00000	FACEBOOK INC CL A	<input type="radio"/>	\$0.00	\$0.00	\$2.00	\$2.00
2	<input type="button" value="Delete"/> <input type="button" value="Edit"/>	IBM	100.00000	INTERNATIONAL BUSINESS MACHS COM	<input type="radio"/>	\$0.00	\$0.00	\$2.00	\$2.00
3	<input type="button" value="Delete"/> <input type="button" value="Edit"/>	111111111	1,000.00000	Issue UNKNOWN OR CUSTOM Descr. 2 <input type="text"/> Per Unit \$ <input type="text"/>	<input type="radio"/>	\$0.00	\$0.00	\$2.00	\$2.00
TOTAL PORTFOLIO CHARGE									\$6.00

When complete, click on the Save button, and then click Checkout. After pricing, a report will be displayed on your screen. You can now view/print, email, or export the report to a spreadsheet.

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Print View | Export | New Report | Email | Logout

ESTATE TAX SECURITIES VALUATION
 NAME OF ESTATE: JOHN DOE
 DATE OF DEATH: 10/10/2012
 REPORT TYPE: DATE OF DEATH
 REPORT DATE: 10/25/2012 01:40 PM

PAGE NO. 1

#	CUSIP	DESCRIPTION	SHARES/ PAR VALUE	PRICE DATE	HIGH/ASK PRICE	LOW/BID PRICE	MEAN PRICE	SECURITY VALUE	ACCR. DIV/INT
1	459200101	[IBM] INTERNATIONAL BUSINESS MACHS COM	100.00000	10/10	208.23000	205.05000	206.64000	20,664.00	
GRAND TOTALS								20,664.00	0.00
TOTAL PRINCIPAL PLUS ACCRUED INTEREST AND DIVIDENDS								20,664.00	

User Settings

Web Appraise - Windows Internet Explorer
 http://appraisenj.com/webappraisexis/settings.aspx

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Portfolio Settings

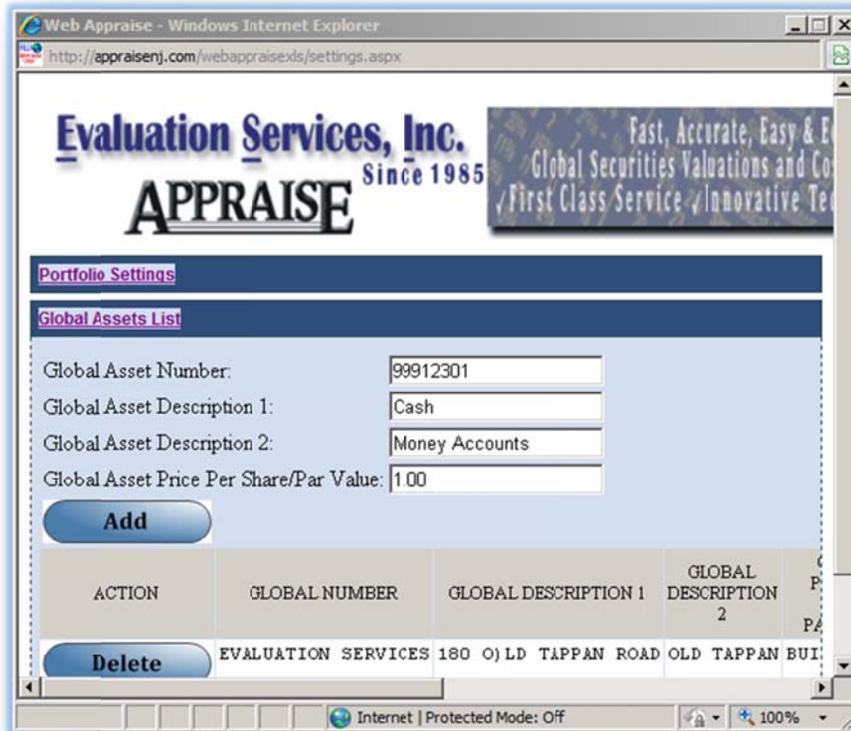
Muni. Bond Price Method: YES
 Include DOD: YES
 Apply Splits During Alt Value Period: YES
 Amortized GNMA Values: YES

Save

Global Assets List
 Change Password

Internet | Protected Mode: Off | 100%

The User Settings section allows you to customize portfolio settings, add items to the Global Asset list, and change your password. To change the portfolio settings use the drop down box to select the settings. Hovering over the settings will display on-screen explanations for the setting.



The Global Asset List allows you to enter custom cusips that when entered in the portfolio will populate with the custom description and price per share. This is useful for adding cash and or money market accounts to the portfolio. Enter the required information and then click Add.

Recent Portfolios

Your existing portfolios are kept here. You are able to open, view, or delete portfolios from this section.

New Report

Click on the New Report button to clear the form and create a new portfolio.

Email

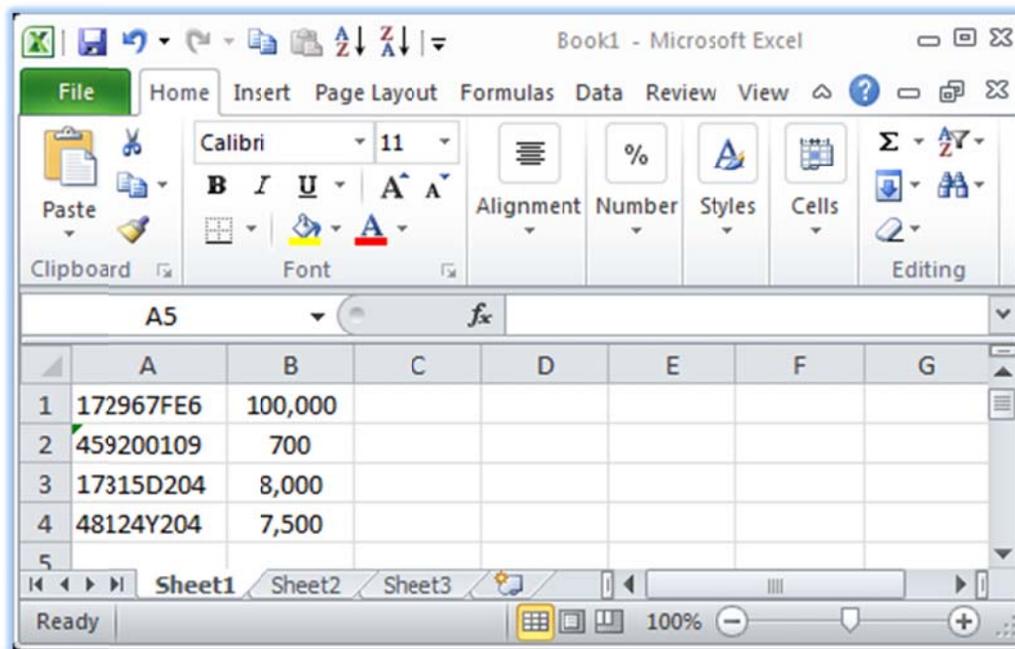
When you click on the Email button, an email form is displayed along with a listing of your portfolios. You can attach and send your report directly from Web.Appraise. If you have questions, type the word HELPDESK in the 'To:' field of the email address box. We will reply to your registered email address.

Copy

When you click on the Copy button, a listing of existing portfolios is displayed. You can select a portfolio to copy and are prompted to enter a new Portfolio ID, Estate Name, and date.

Import

You can upload securities in a spreadsheet to an existing portfolio. The first column (A) in the Import file must contain a valid security ID. The second column (B) in the file must contain shares/par value. Do not have any headers. See example.



The screenshot shows a Microsoft Excel spreadsheet titled 'Book1 - Microsoft Excel'. The ribbon is set to 'Home', and the 'Font' group is active. The spreadsheet has four columns labeled A, B, C, and D, and five rows labeled 1 through 5. The data in the spreadsheet is as follows:

	A	B	C	D	E	F	G
1	172967FE6	100,000					
2	459200109	700					
3	17315D204	8,000					
4	48124Y204	7,500					
5							