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# FairSplit documentation

How to use the FairSplit web application

The FairSplit team

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Read

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Read

# 1. FairSplit user documentation

Should I use FairSplit?

Deciding to use FairSplit? Our process and capabilities. What to expect.

Using FairSplit

For division **administrators**. The entire process, the full narrative.

What a **divisee** needs to know

Subset relevant to division beneficiaries, taking part in division rounds.

What a lister needs to know

Subset relevant to listers, who upload photos and build an inventory.

What a **sponsor** needs to know

Subset relevant to **sponsors**. They pay the bill and can invite participants.

(You can navigate this website with the keyboard; press ? (the question mark key) to see how. Also notice the menu bar at the top contains **Search**, **Previous** and **Next**.)

# 2. About

#### 2.1 Should I use FairSplit?

This section talks about our process and capabilities. Find out whether FairSplit is the right tool for you.

# 2.1.1 What is FairSplit?

**FairSplit** is a collaborative web application for **listing, valuating, and dividing assets**. It can be used for any kinds of objects that can be listed and divided among people.

You can easily create an **inventory** - a list of assets - in the FairSplit web app. This includes the features of listing, valuating, and inviting people to look at the work done.

If you like, you can then turn your inventory into a **division**: all the above, plus features to fairly divide the assets among divisees (beneficiaries). It's possible to start with an inventory and later upgrade it to a division.

# 2.1.2 Why use FairSplit?

Rather than physically go to a house and divide assets, a family can avoid a long trip by doing the division process remotely through the Internet. With transparency and much less friction and disagreement.

Third parties can do the jobs of listing assets, valuating them etc.

If you have assets to divide and don't even know where to start you can <u>reach out</u> and request advice from the FairSplit team – even if you are not subscribed to the software solution.

FairSplit has expertise in dividing things, not families.

## 2.1.3 In what situations is FairSplit useful?

- Estate: dividing an inheritance
- Estate Planning: making arrangements in preparation for future incapacity or death
- Downsizing: moving to a smaller house after retirement
- Divorce
- Insurance: take photos of your possessions so after a loss you know what to claim

The above are the main use cases, but there are many others. You can even divide immaterial things.

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# 2.1.4 How is FairSplit different from other inventory solutions?

#### Cutting edge technology

**FairSplit** is the first inventory solution ever to offer:

- its own patented division methods and
- automated listing from photos by artificial intelligence.

The division methods help conduct the process in a just manner. Divisees then feel they had a fair shot to receive the items they wanted and usually people feel comfortable about the results.

If you don't wish to use our division methods, you can still use FairSplit to list an inventory.

You can simply take photos, upload them to FairSplit, and have the AI create assets from the photos, saving hours of work. At the end you should review the AI-created assets, correcting any mistakes.

When the assets are created, you must decide how to valuate them. You may type the values yourself - or ask another person to do it - but if you are not sure how much each thing is worth, our software can help. You can either see for how much similar products were recently sold on ebay or have the AI tool suggest values.

#### Data security

FairSplit takes the security of you information very seriously.

No one can see your estate or asset data, except the people who have been added to the inventory or division. No data within it is public.

Learn more about the security measures adopted by FairSplit to protect you and your data.

#### The best customer service

FairSplit understands how sensitive its use cases are – what people are going through – and therefore treats users in a warm and understanding way. You can <u>contact</u> our team and receive guidance about your division even if you are not a client yet.

# 2.1.5 Can I import an inventory done in another application?

Yes. <u>Here is how to do that.</u>

And, of course, you can export a FairSplit inventory as a spreadsheet, too.

# 2.1.6 Do I need professional help to use FairSplit?

Not at all. Although professionals who deal with estates and divisions will have the experience to make it go more smoothly and provide personal insight and suggestions, FairSplit was designed to be used by anyone.

If at any moment you decide that you would like a third party to inventory your property and prepare the division in the system, or that you would like an experienced lawyer or psychologist to assist your family during the process, you can contact the FairSplit team and ask for recommendations. We will be happy to put you in contact with our partners.

#### 2.2 Concepts in the FairSplit web app

# 2.2.1 What is the difference between an inventory and a division?

An **inventory** is a list of items. You can add photos to it and valuate the assets on the inventory.

You can stop at the inventory, or go ahead and make it into a division.

A **division** is when you use **FairSplit division rounds** to divide inventoried assets among the beneficiaries. We call them **divisees**.

# 2.2.2 What are the main concepts of a FairSplit inventory?

A **property** is a realty such as a house or condo. Each property contains rooms and assets.

A **room** belongs to a property and may contain assets and files, including photos.

**Assets** may (optionally) belong to a property, to a room and to a category. An individual asset may also have photos and other files associated with it. But this is all optional: an asset may also be simply a name. Assets are sometimes referred to as items.

## 2.2.3 Market value and emotional value

#### What is MV (Market Value)?

Market value is the approximate real world value of an item if sold through an estate sale or auction, Craig's List, yard sale, etc. This division process will result in each party receiving their share of the MV, and sometimes paying or receiving offsetting cash to balance differences.

For all to feel good about the division, all parties need to agree that the items listed and values are fair. There are a few ways to set the monetary value of assets; FairSplit uses Al to propose values, and the result is good enough for most, but not all, assets listed.

Agreeing on a value isn't always possible with the initial listing. An Administrator may choose to adjust a few values based on feedback or get an appraisal (if items of significant value).

One may also remove items where values are in dispute to be separately divided in a later round through a bidding process among the participants to establish a true "market value" for the participants. This allows the other items to be divided in faster ways, thereby not holding up the process.

Note:		
<ul> <li>The initial AR round helps confirm the values.</li> </ul>		

- Actual cash value in an estate is significantly less, due to estate sales company, consignment or auction fees. We usually recommended discounting market values to .50 to determine fair cash values between family members if reconciling to balance.
- Things are most often worth much, much less than people think. Examples of this can be particularly shocking for antiques, high quality dark furniture, silver, china, art and collectibles.
- Sometimes families decide to just ignore the monetary value if not significant, and not show or use values during the division.

#### What is EV (Emotional Value)?

For some participants, assets on the list to be divided hold emotional ties, or value; Dad's old guitar, Mom's silver brush, a watercolor from a class taken together. Some items may be easy to agree to get pre-assigned to one party or another, but others need a way to fairly assign.

Our **Emotional Value Bidding** round makes it possible for all to have an equally fair chance at winning such items, through bidding emotional value points on items.

# 2.2.4 What to expect in division rounds?

Rounds are different methods for dividing items among parties.

After following all the steps to set up an inventory on FairSplit, you can start the division rounds. A normal division is composed of three rounds, but in special cases more rounds can be added.

An administrator sets up a round, divisees bid on it, and then the items are distributed.

A new round starts in the pending state. A **pending round** can be edited by administrators.

An **active round** is in the bidding stage. Divisees must interact with the active round until the bidding end time set by the administrator. If all divisees finish early and indicate they are done, the round may end earlier.

When the time for bidding is past, it becomes a **closed round**. Divisees can no longer bid and the system divides the assets among the divisees, using its own patented method. In just a couple minutes the proposed distribution is available.

#### What to expect from the AR round?

The **Asset Review round** is recommended as the first one. It does not assign assets to people. It only asks them what assets they are interested in – without showing this information to the others.

When this first round is finished, FairSplit generates a list of **assets nobody is interested in** and shares it with the family; work can start early on **selling or donating** these, saving **time and storage costs**.

The **Asset Review round** also allows people to detect any problems with the way assets have been listed, before the actual division starts.

#### What to expect from the EV round?

The **Emotional Value round** usually follows the AR round. Each beneficiary gets a number of credits (for instance, 500) to distribute on a few assets which they care about most (the maximum number of assets is usually 7).

When this round is done, each person usually has what's dearest to them, and if not, at least they understand the division was done through a fair, neutral process, and they feel they had a fair shot.

#### What to expect from the SO round?

The **Selection Order round** is the final one. It is based on ordering a list of assets by preference.

Divisees must put the most wanted item on the top of their list, the second most wanted on the second position, and so on.

Then a distribution program assigns assets to divisees in turns, according to their lists of preferences. The program only takes a second to complete the division, but the result of this process is the same as if people had taken turns choosing one asset each turn.

# 2.2.5 What is the FairSplit Survey of Estate Division?

FairSplit Survey of Estate Division are five questions that we use to understand the goals, preferences and concerns of each divisee.

This aims to keep all parties confident in the system, by knowing their wishes so they can be honored and valued equally with those of the Administrator and other participants.

#### What types of changes are affected by my answers?

As one example, if every participant is interested in a rapid division, and has no EV (Emotional Values) attached to items, the administrator can provide the fastest method in the fewest rounds.

If there is emotional value from any of the parties for certain assets, an Emotional Value round should be done to address that.

#### Why is there an "I agree to abide by the results" statement?

This is for divisees to understand and verify their willingness to consciously commit to the fair and equitable division the FairSplit's process provides.

# 2.2.6 Can immaterial things be divided?

Definitely! Anything that needs to be fairly allocated can be divided:

- For example, "vacation week dates" at a family beach house can be entered as items.
- Vacation dates and holidays in a divorced family can be listed.
- Tasks that need to be done.

If dividing cash, consider putting it into smaller blocks so it can be chosen as equivalent to objects. For example, \$10,000 can be entered in four \$2,500 blocks.

# 2.2.7 Can I upgrade a division that already has an active plan?

Yes. Here is how to do that.

#### 2.3 Frequently Asked Questions

# 2.3.1 Is the service legally binding?

FairSplit is not a legally binding service on its own, but it can be used to create a legally binding distribution or division.

One would use the results as part of a broader legal execution of a division according to your specific state laws, provisions of a legal will, and often with the help of a professional.

Each party should agree to abide by the results of the process before beginning, otherwise it can't as effectively serve as the impartial solution needed for a division.

# 2.3.2 Can I use FairSplit for insurance purposes?

Yes, the inventory can also be used for insurance. In this case, you may photograph the rooms of your home, upload the photos to the FairSplit web app and add names and descriptions to them.

The inventory can show the day when the photos and information were uploaded and modified, and by whom. So, in the future, you can have easy access to evidence of what each room looked like on a certain date.

# 2.3.3 What are the security measures adopted by FairSplit?

(Please note that some of the measures below only work against hackers in proportion to the strength of your password. Do not use a password that is a dictionary word, and include numbers and characters in addition to letters; this helps defend against a brute force attack.)

- No one can see your estate or asset data, except the people who have been added to the inventory or division. No data within it is public.
- The web application uses the **https** protocol which involves an encrypted connection, such that the hardware through which your information passes on the Internet cannot decode the content. This prevents man-in-the-middle hacking attacks.
- We **do not require the address** of any property being inventoried and encourage you not to mention it in the web application.
- We **do not take credit card numbers** on our site. Instead, payment is done through a bank level secure third party.
- We do not store your password only a hash of it. This means no one can recover your password from our database. If you forget your password, you must go through the password recovery procedure, which involves a message to your email address as a way to verify your identity.
- When logging in, if you get your credentials wrong, you need to wait before trying to log in again. The wait time is doubled each time authentication fails. This makes brute force attacks on passwords very difficult to carry out.
- User enumeration attacks do not work in FairSplit.
- We keep all the **software in our Linux servers up-to-date** in order to avoid old, known security vulnerabilities.
- We host our web application with Amazon and use its advanced **network security features** to ensure other Amazon clients cannot access our data. We make a **daily backup** of our database, so that in the unlikely event of a catastrophic bug or failure, we can recover the data to the latest backup. We expect that, in such an event, the largest amount of work you could lose is 24 hours.
- The **cookies** used by the web app are protected with the HostOnly, HttpOnly and Samesite properties as applicable.
- Our software is written in such a way as to protect against **SQL injection** attacks and **cross-site request forgery** attacks. Our team knows that **discipline** is a very important trait in a programmer and our software is written in a careful, orderly, informed and deliberate manner.

We encourage you to use a reasonably recent version of a respected browser such as Firefox or Chromium. Also recommended are browsers derived from Chromium, such as Brave, Chrome, and Edge.

# 2.3.4 Who pays for the division service?

Typically the costs are covered from estate funds. If an Executor has chosen FairSplit as an aid to assist their efforts, they would typically be reimbursed. If booked through a service provider, they may separate the fee or have it included in with their overall fees.

# 2.3.5 Are there charges after the initial term?

Our <u>Pricing page</u> shows the duration of each plan.

At any point you can save or print reports that summarize the resulting inventory and all the information in it.

FairSplit does not currently delete old data. We reserve the right to do so after two years to avoid the costs of storing photos and inventories indefinitely. In this case, the administrator of the inventory or division will definitely get an email in advance, letting her know that the inventory may be deleted, or may be continued for a nominal annual fee.

# 2.3.6 What if I really need the service but cannot afford it?

Our primary goal with FairSplit is to reduce emotional stress and conflict in divisions and preserve civility and respect between the parties. If you can't afford the fee, but have a need for the service, we want to hear from you. Email us for a free or reduced code due to true need.



#### 2.4 Resources

# 2.4.1 Is there a printable sheet with an overview of the services?

Yes. Click here to download the printable sheet.

# 2.4.2 Do you have a sample letter that can be sent to heirs explaining FairSplit and our intent to use it to divide the personal property of our estate?

#### Dear [HEIRS' NAMES],

As [Executor / Trustee] we need a way to list and share all the personal property of [Mom and Dad's Estate] and then divide it fairly. We found <u>www.fairsplit.com</u> that has been providing these services for thousands of families for more than a decade, and the nice thing is, it is online, so we can do it from our homes or work in our own schedules. The system allows us to photograph, upload and share everything transparently in a private family account, so everyone can be sure all that should be listed is listed and things are not duplicated, etc.

There is a system of rounds used to determine what is wanted.

First, the Asset Review round (Yes or No, interested or not).

Then an Emotional Value round that gives everyone points they use to bid on a limited number of things most wanted. It works much like a silent auction, with blind bidding, and the highest bidder wins.

Finally, the remaining items are divided in Selection Order rounds – choosing the items wanted from the list, then arranging them in top to bottom order of interest. They are awarded in a "snake" ordering system of top item remaining on each person's list when their number in the random order is up. It is easiest to understand on the video <a href="https://youtu.be/HgDoSjqWlmk">https://youtu.be/HgDoSjqWlmk</a>

#### **OPTIONAL:**

Also, we have asked David, the founder of FairSplit, to serve as Administrator for the rounds and to help guide us through the process. By having David as the independent third party, I am recusing myself as Administrator to ensure there is no real or perceived advantage and all heirs (or Divisees as FairSplit calls them) have a blind, fair system of being awarded things from the estate.

#### **OPTIONAL - EDIT TO MATCH DECISIONS OF ESTATE:**

David has recommended that we decide in advance who bears the costs of packing and shipping awarded items. Also, to determine if market values are of importance to equalize the estate. He indicates that many families are fine as long as percentages are fairly close, within 5-10 percent of each other and others would like it to simply be a fair process and if some get more or less, that is fine. He also indicates that it is normal to discount any appraised values when doing equalization to get closer to real cash value by discounting things by 40-50% to better reflect the costs of an estate sale, auction or consignment costs. Exceptions to that may be KBB or Edmonds blue book values on vehicles, or melt down values on jewelry or silver.

You will receive an emailed invitation to the family account, and to each round. The emails will include instructions for each step in the process. We hope everyone will be glad for the blind fair system, and for being able to get this part of the estate settlement done with the least time and cost to everyone.

All the best,

NAME

# 2.4.3 Advice on valuation of assets

It is best to get high value jewelry appraised by a jeweler for what they will pay you for it, not what it should be insured for. Cars, you can look up on KBB or Edmonds. Silver is usually worth melt down, weight times value of silver. A jeweler can help if needed. Many families don't choose to value things valued under \$100. Some families get furniture appraisers and art appraisers if they feel there is enough value there to be divided equally. Some do equalization by writing checks to the estate for the part received above their share and some put items back into the pool for others to choose to help get more equal.

# 3. Using FairSplit

FairSplit is intuitive, so there is no need to read this documentation before getting started, unless you will be serving as a division administrator.

#### 3.1 Inventory topics

# Getting started Participants and roles Setting up properties and rooms Overview page

Taking and uploading photos

Listing assets

<u>Using the grid</u>

**Reports** 

#### 3.2 Division topics

**Division rounds** 

The Asset Review round

The Emotional Value round

The Selection Order round

#### 3.3 Meta topics

#### Upgrading your plan

Leaving a review

Co-branding as a Local Agent

(You can navigate this website with the keyboard; press ? (the question mark key) to see how. Also notice the menu bar at the top contains **Search**, **Previous** and **Next**.)

# 4. Inventory

#### 4.1 How to make an inventory using FairSplit?

# 4.1.1 Before starting

- 1. Photograph your inventory according to our Photography guidelines.
- 2. Create a user at app.fairsplit.com if you haven't yet done so.
- 3. Log in.
- 4. Create an **inventory**.
- 5. If someone else is going to photograph and/or list assets, invite them into your inventory in the Participants page, and give them the **Asset Lister** role. FairSplit will send them an email message.

<u>Contact us</u> if you'd like to hire <u>FairSplit</u> crew to take photos and create your inventory for you.

# 4.1.2 Building the inventory

- 1. One inventory can contain multiple **properties**. For instance, a house and an apartment.
- 2. Add the **rooms** of each property.
- 3. Upload **photos** into each room separately.
- 4. Create **assets** from the uploaded photos. We recommend you use our AI listing feature, so the AI writes the asset descriptions and other information, based on the uploaded photos.
- 5. You can **view and edit** assets in a spreadsheet-like grid. Add a description, market value, categories etc.
- 6. **Invite other people to see** the inventory you've built. You can give people different levels of access to your inventory.

#### In this video you can watch how a division is made, from beginning to the end: FairSplit - How it Works

The next pages detail this process.

(You can navigate this website with the keyboard; press ? (the question mark key) to see how. Also notice the menu bar at the top contains **Search**, **Previous** and **Next**.)

#### 4.2 Participants and roles

# 4.2.1 Understanding roles

In this process, multiple stakeholders with different objectives come together, in the FairSplit web app, to make an inventory and maybe divide it. Therefore, each person gets assigned one or more roles, according to their responsibilities and the permissions they need. Roles control what someone can and cannot do within the system:

#### Sponsor

The **sponsor** is the account holder who initiates payment for the FairSplit plan. A sponsor can do very little; to be directly involved in daily activities, a sponsor must acquire other roles as well. Here are a sponsor's permissions:

- Invite participants.
- Assign their roles, including the Administrator role.

#### Asset Lister

An **asset lister** uploads photos and lists the assets, forming the inventory.

Some families assign multiple participants to this role to speed up the listing process. They may be an independent third party paid to help, or just a sibling helping the administrator for the sake of time.

An asset lister has these permissions:

- Create properties (such as "Apartment") and the rooms inside the properties.
- Upload, edit, and remove photos.
- List assets with all their details.

#### Valuator

A **valuator** sets estimated prices for assets. She cannot change anything else in the inventory. She may or may not be a professional appraiser. Families can choose to have actual appraisals on all assets, or only assets above a certain estimated value.

#### Divisee

A **divisee** is a beneficiary of the division process, entitled to a fraction of the assets, known as allocation percentage.

A divisee participates in division rounds, bidding in them to receive a portion of the assets.

The allocation percentage is for reference only. It does not block selections and it is not considered in the distribution algorithms of division rounds. In each division round divisees select and are awarded assets based on blind, impartial round rules.

A divisee cannot edit the inventory. If you want a divisee to be able to modify assets, assign them also the lister role.

#### Administrator

The **Administrator** role is the most powerful one. She can do everything the other roles can do, except, of course, bid in rounds like a divisee. She can:

- Like a lister, set up properties and rooms, upload photos and organize the inventory.
- Like a sponsor, invite participants and set their roles.

In addition, only the administrator can manage a division:

- Setting up and managing division rounds.
- After division rounds, an administrator cannot change their results, but can make subsequent changes to asset distribution. This may be to help bring divisees closer to their allocation percentage, or at the request of two parties agreeing to an exchange. This should never be done without full disclosure to all participants.

#### Division Observer

The **division observer** is a passive role in the division process, with view-only access.

She can see the participants, the inventory and the division rounds. But she cannot make changes.

This role is typically assigned to mediators, and also to probate or estate attorneys.

#### **Inventory Observer**

An **inventory observer** can see less than the division observer. She can view the inventory, but cannot see participants, division rounds, or reports.

She can view properties, rooms and assets. She cannot make any changes.

This role is commonly assigned to estate sales agents or moving companies, to assess items for sale, donation, or transfer.

# 4.2.2 Assigning roles

Participants can hold multiple roles. For example, John can be both a divisee and a lister. In some cases, a third party may be assigned the lister and valuator roles to handle asset listing and valuation.

The administrator may also change participant roles during the process. For example, a divisee may temporarily be assigned the lister role to assist with creating the asset list, but this role can be removed once the task is complete.

If divisees are not helping create the asset inventory, administrators typically wait to invite them until the inventory has been listed.

# 4.2.3 Typical role setups for inventories

An inventory can be done by a single person, who must hold the sponsor and administrator roles:



The following combination allows for collaboration in listing (Peter and Joan, because an administrator can list) and valuating assets (Peter and Michael):

👤 Joan Smith	L Michael Smith	▲ Peter Smith
₩ joansmith-divvy@mailinator.com	🐱 michael-divvy@mailinator.com	petersmith-divvy@mailinator.com
Sponsor, Administrator	Valuator	Valuator, Asset lister
🖍 Edit 🛛 💼 Remove	🖍 Edit 🛛 💼 Remove	🖍 Edit 🛛 💼 Remove

Above, the valuator role given to Peter is redundant and unnecessary, because Peter is also a lister, and a lister can change prices, too.

# 4.2.4 Typical role setups for divisions

A division requires at least two divisees. A sponsor and an administrator are also required, like you saw above in inventories.

In this bad example, Joan holds the roles of **sponsor**, **administrator**, and **divisee**:

L Joan Smith	L Michael Smith
⊠ joansmith-divvy@mailinator.com	Michael-divvy@mailinator.com
Sponsor, Administrator, Divisee	Divisee
Allocation percentage: 50%	Allocation percentage: 50%
🖍 Edit 🛛 💼 Remove	🖍 Edit 🛛 💼 Remove

The above setup is problematic because one divisee is also an administrator, and therefore sees more information and holds more power than the other divisee. This is allowed but considered unfair – someone else should be sought to serve as an administrator. FairSplit staff can serve as administrator, as an additional service.

Allocation percentage: 50%

🖍 Edit

💼 Remove

The divisee-administrator is considered unfair for these main reasons: • Ability to see AR bids. In the first division round, divisees declare which assets they are interested in. Divisees cannot see each other's interests, but the administrator can, in order to prepare subsequent rounds. · Ability to assign assets to divisees directly. Such assignments can be identified when compared to round results, which are shown in a separate column. But affairs might be unfair until someone detects the assignment. The following combination does not have that problem - no divisee is an administrator: 👤 Joan Smith 👤 Michael Smith Peter Smith 🔀 joansmith-divvy@mailinator.com 🔀 michael-divvy@mailinator.com petersmith-divvy@mailinator.com Sponsor, Administrator Divisee Divisee

# 4.2.5 How to invite participants

🛱 Remove

If more than one person will be using the FairSplit app, the sponsor or administrator must invite them to join the inventory. To send an invitation:

Allocation percentage: 50%

🛅 Remove

💉 Edit

Go to the Participants page by clicking **People** in the inventory menu:



Click Invite someone:

🖍 Edit



Complete the invitation form with the participant's email address, their full name, and a short version of their name to be shown where space is small:

Email*		
Email		
Full Name		
Full Name		
Short name		
Short name		

Next, check the appropriate role(s) for the participant (see the previous sections for more details):

Roles*	
😧 🗏 Administ	rator
😧 🗏 Divisee	
🔞 🔲 Valuator	
😧 🔲 Asset list	ter
😧 🗏 Division (	observer
😧 🗏 Inventory	observer
😧 🗏 Sponsor	
Allocation perc	entage
0	%

If the participant is a **divisee**, she is entitled to a fraction of the total division value, which you set as her **allocation percentage**.

If your division includes **multiple family tiers** (e.g. stepchildren, grandchildren, etc.), you may choose to complete one division first and then invite the next tier. Start the second tier with newly invited divisees and fresh allocation percentages based on the remaining assets. Optionally, the people in the second tier may be invited from the beginning by assigning them the division observer role, to later be switched to divisee. This way grandchildren can be aware of what is happening.

You may include a custom message in the invitation email. This is a good opportunity to explain in your own words why they are receiving this message and what to expect:

Personal notes			
Double check the participant's details and roles, then click the <b>Invite</b> button:	✓ Invite	X Cancel	
A confirmation message will appear if the information validates, and soon after,	, the email m	essage will be sen	t.

The invitee now appears under "Invited participants". After she accepts her invitation and you refresh the page, she will appear above, in the "Current participants" section. Later, when creating division rounds, an administrator can only include current participants – not invited participants.

#### 4.2.6 Divisee survey

When joining a division, each divise is asked to complete a brief survey. The responses help the administrator better understand individual priorities and guide the overall tone of the division process.

The goal of the survey is to identify from the start the concerns and goals of each divisee. FairSplit is designed to support transparency and fairness, ensuring that every participant feels their wishes are acknowledged and considered equally, in order to keep all parties confident in the process.

Survey						1. Strongly disagree	
Please quickly value the following assertions so that we can make the best determinations for the methods to divi participants. This survey will help us to assuage your concerns about the fairness and equitability of our division p	2. Disagree 3. Neither agree nor o 4. Agree 5. Strongly agree	lisagr					
Assertion	1	2	3	4	5		
1. There are items on the list that hold strong EV (Emotional Value) to me.	$\odot$	$\odot$	۲	0	Θ		
2. I trust the other parties in this process to only want what is fair to all involved.	$\odot$	0	۲	$\odot$	0		
3. I believe it is important for me, and all parties, to get their Fair Market Value (FMV) of the assets being divided.		$\odot$	۲	0	0		
4. I would like considerable time to reflect on my value allocations and choices.		$\odot$	۲	0	0		
5. I would like to have this go quickly; I can choose among my options rapidly.		$\odot$	۲	0	0		
6. I am fine with however the Administrator chooses to run the division.	0	$\odot$	۲	0	0		
7. FairSplit has been selected as the method todivide fairly. My intention is to abide by the results.	$\odot$	0	۲	$\odot$	0		
Finish!							
DIVIDE THINGS, NOT FAMILIE © Copyright 2011-2019 DivvyMaster. All rights reserved. U. S. Patent US 8812389B2. Pleas	ES.	d our f	Privacy	y Polic	y and Terms of Use		

Learn how to use FairSplit with our User Guide.

The division administrator can see the results of the survey on the Overview page.

#### 4.3 Setting up properties and rooms

There are several ways to set up an inventory or division. All start with a property that contains rooms. Rooms contain assets. Photos can be connected to rooms and to assets. Assets can also be in categories. If working from a storage building or single large room, simply label properties and rooms in the best way that works for you.

To populate the FairSplit inventory, there's an option to using FairSplit itself. If you already have an inventory spreadsheet, you can convert and upload it and not lose your earlier work.

# 4.3.1 Properties and rooms

Once the Administrator has been assigned and logs in, FairSplit will automatically create a property titled, "Property 1". We suggest you rename/edit it to something more descriptive. In the following example we will rename it, "Big house".

## 4.3.2 How to rename a property

Click **Properties and assets** on the menu to go to the Properties page:



Here we can see all the properties contained in this "Smith downsize" example division.

Click **Property 1** to enter it:



On the individual property page, the name "Property 1" is editable. You know this because it is blue, underlined with dotted lines, and followed by a writing hand icon: and followed by a writing hand icon: <math>
and followed by a writing hand icon: and followed by a writing hand icon: <math>
and followed by a writing hand icon: <math>
and followed by a writing hand icon: a writing hand ico



Click the current property name ("Property 1") to start editing it:

Property:	Property 1				
	Ok Cancel				
Replace the name – in our example "Big house" – and click the <b>OK</b> button.					
Property:	Big house				
	Ok Cancel				

The property is renamed. Our next step is to add rooms to it. (This assumes the assets are still in place in the Property; if the assets are in storage you may wish to create room names that help organize in other ways, possibly naming rooms categories as a way to separate in logical ways.)



# 4.3.3 How to add rooms

To add rooms, from the property page, click the **Add room** button:



already a category column, so it would duplicate existing sorting options, making it more confusing to all. One can create new categories as well.)

Finally click the **Add rooms** button and all the rooms will be added to your property:



The "Big House" property page is shown, with all the rooms that were added:



If you have forgotten a room, add it at any time by clicking the button **Add room**. The rooms already in the property will show up on the right column and the left columns will be smaller than before. Check the forgotten room or type its name and click in the **Add rooms** button like before.

Add rooms						
1 Select standard rooms	2 Add custom rooms	Rooms already in Big house				
<ul> <li>Den</li> <li>Entry - foyer</li> <li>Hallway</li> <li>House exterior</li> <li>Office - study</li> <li>Porch - patio</li> <li>Shed</li> </ul>	Wine cellar Room name	<ul> <li>Attic</li> <li>Basement</li> <li>Bathroom - master</li> <li>Bedroom - guest</li> <li>Bedroom - kids</li> <li>Bathroom</li> <li>Bedroom - master</li> <li>Dining</li> <li>Family room</li> <li>Garage</li> <li>Home office - study den</li> <li>Kitchen</li> <li>Living</li> <li>Laundry</li> <li>Front garden</li> <li>Kids playroom</li> </ul>				

## 4.3.4 How to add a property

If you have more than one property associated with the inventory, and you purchased a multi-property plan, you can easily add it. Contact FairSplit if you need to upgrade your purchase.

Click **Properties and assets** on the menu to go to the Properties page:



You can see the property you set up before, i.e. "Smith downsize". Click the **Add property** button:



A pop-up window appears, asking you to enter a property name. The appearance of this pop-up can vary depending on your browser. Just type the name of the new property and click **OK**:

Please enter the property name				
	Beach house			
	OK Cancelar			

You will be redirected to the same page for adding rooms you saw in the previous section.

Properties / Beach house								
Add rooms								
1	Select standard rooms	Add custom rooms	Rooms already in Beach house					
	Attic	Room name	(No rooms)					
	Basement							
	Bathroom							
	Bathroom - master	Cancel						
	🗏 Bedroom - guest							
	🗏 Bedroom - kids							
	Bedroom - master							
	🗖 Den							
	Dining							
	🔲 Entry - foyer							
	E Family room							

Just follow the same steps, select the rooms you want in the left column or type the names in the middle column and then click the **Add rooms** button. The new property will be created with its rooms.



The next step is to upload the photos, notes on each room, and any other files (like appraisals) for each room. These photos and files can be associated with one or more assets afterwards or simply kept available in that room. When a photo or document gets associated with an asset, the eye image changes to a paperclip.

#### 4.4 How to customize the Overview page

This guide shows you how to personalize the Overview page in FairSplit by adding a photo, a saying or quote, and renaming the division or inventory.

# 4.4.1 How to add an overview image

On the overview page, press the button

F Set a division image

Select the photo or logo file from your local computer and press **Open**:



The image gets uploaded and appears on the page:



## 4.4.2 How to add a saying or quote

The Overview page has space for a favorite family quote or a piece of shared wisdom. Here is how to edit it.
On the (	overview page, click 3 Add saying or quote 4
A text b	Do not go where the path may lead, go instead
0	where there is no path
1.1	⊘ Ok Cancel

The saying or quote will be saved and displayed:



## 4.4.3 How to rename the division or inventory

On the Overview page, click the name of the current inventory:

# Mr Smith Estate 🗠

Enter the new name, then click **OK**:



The name gets saved and appears immediately:



# 4.5 Taking and uploading photos

After creating the rooms of the property, it is time for the **lister** role to take photos and upload them in each room, in preparation for the listing step.

We recommend taking photos room by room and uploading them to each room in FairSplit.

It is important that you or the person who will take the pictures of the assets watch this one minute long video before starting your first inventory: <u>Tips for Photographing and Inventorying a Home</u>.

Contact us if you'd like to hire FairSplit crew to take photos and create your inventory for you.

# 4.5.1 Taking photos

Be sure to watch our video on taking photos:

- either on <a href="https://app.fairsplit.com/">https://app.fairsplit.com/</a>
- or on our YouTube channel: <a href="http://www.youtube.com/@DivvyMaster">www.youtube.com/@DivvyMaster</a>

## How big should the photos be?

Pictures saved in low to medium sized files ( $\sim$ 100 kB) are fine since they will be viewed online. Larger files are also fine, but can slow down the upload process and take up space on your phone or camera.

## Which assets should be grouped in a photo?

In FairSplit, there are four main types of photos:

Primary photos: This is the close-up of the item or group of pieces that will be listed as one asset.

Many pieces are typically grouped and valued together – essentially being considered a single asset. Examples:

- Matching sofa, loveseat and chairs
- Dining table and chairs with buffet
- Bedroom set (including dresser, chest, nightstands and headboards)
- Matching necklace and earrings

Try to group the pieces the way most people would prefer to own them. When in doubt, list items separately.

**Secondary photos:** These are for additional detail on an item, such as a different angle, a close up of brand, damage, an appraisal of the asset, etc.

**Group photo:** These show multiple assets to be listed. An example may be a shot in the garage that includes digging tools, several rakes, and two ladders. One may use the same photo to list all of those as separate assets.

**Overview photos:** Wide view from the doorway to show all items as positioned in that room. These provide a reference photo for family and yourself if needed. Overview photos are not used for listing assets. They are only for the memory of a room.

## Photography guidelines to make your life easier

- 1. Remember to take with you when taking the pictures:
  - Notebook and pen.
    - Letters or numbers to place next to items.
    - For scale reference: a tape measure, yard stick, ruler or dollar bill. (If you **place a scale reference device next to the object**, the AI will see it and estimate its dimensions more accurately.)
- 2. Make sure that all the rooms have **lots of light**. When photographing anything, the more light the better. If you can keep the light source behind you, even better.
- 3. Taking a single photo of each item to be listed is usually the best practice. This can make it very easy to list assets using our AI tool or manually.
- 4. Take more than one photo of any **piece of art or valuable asset** -- different angles, close-ups of damage, brand or artist signature, appraisals, etc. These would all be be Secondary Photos, to add relevant detail needed.
- 5. If there are too many low value items, you don't need to take individual pictures of everything. But always avoid photographing big groups of random assets instead, make **smaller groups with themes** that can later be selected as a batch in the division.
  - $^{\circ}$  Christmas ornaments can be separated in groups according to style or color.
  - $^{\circ}$  Books can be separated by theme cook books, fantasy books, etc.
  - $^\circ$  Kitchen utensils can be separated in useful kits small groups of pots, pans, spoons, knifes, etc.
- 6. Group shots are also fine for inventories where most people are familiar with nearly all assets. Multiple assets that will be listed individually can be associated with a single photo a good way to save time if details are not needed in the pictures. For example, a single photo of 5 sets of earrings can be easily associated with all five single listings of each earring.
- 7. Small papers with numbers or letters will save time and make it easier to identify the assets when there are many similar pieces together. Examples might be Lladro porcelain statues, watches or jewelry. Tip: Lay a blanket or towel on a bed and put several pieces of jewelry out and take group shots using the letters or numbers to help identify.
- Use the notebook and pen to make notes about each photo, listing what is on it and adding details such as measurements, defects, which room it belonged to, etc. After photographing each asset, take a picture of your notes about that asset, so the photos and the notes will appear together on your phone or camera.
- 9. Make the last photo of each room a sheet of general notes (e.g. date and time) or a picture of a solid color. It will help delimit sets of photos in your camera or phone's gallery and make uploading them to FairSplit rooms super easy.

# 4.5.2 Uploading photos and files

It is useful to know in advance that in FairSplit photos are not shown in the order they are uploaded, but in alphabetical order by filename.

You can upload photos or scans of appraisals and receipts. Any file format is accepted, not just photos. So documentation about expensive assets can easily be added.

We recommend entering each room in FairSplit and uploading the photos that belong in that room, then moving on to other rooms. If you are not dividing your inventory by room, then you can use the central upload page to upload all files and photos.

Below we'll show how to do these things.

## How to add photos and files room by room To use this method (recommended if assets are still in the house), you must have already set up your property and rooms. This was covered in a previous section of this documentation. To start adding files, click **Properties and assets** in the menu: roperties and assets 1 P iew Here we have the two properties previously created. Click the **Big house** to navigate to that property: **FAIR**SPLIT Admin 🗸 Change division -Smith downsize Overview roperties and assets Properties Smith downsize Properties All assets of Files, Add property this division Click a property below to navigate:

To upload photos of the living room, select **Living**:

Beach house - 11 rooms

Big house - 14 rooms

而

m



Below we can see the living room page. Click on Upload photos and files into "Living":



As with the previous method of uploading all photos, you can either drag and drop photos of the living room or click on the **Choose files** button:

Room: Living \land (No room description) 🖈	
<ul> <li>✓ Upload photos and files into "Living"</li> <li></li></ul>	0 uploads in the queue.
You can upload any type of file: photos, appraisals, receipts, invoices, manuals, warranty certificates, and any supporting file. Chosen files will end up in the current room. In order to upload files into another room or asset, navigate to the desired location first, then choose the files. While uploading is in progress, you can safely navigate among properties, rooms and assets, edit them and even enqueue more uploads. It's safe, if you try to navigate away there will be a confirmation.	Drop photos and files here
Photos, appraisals and other files  (No files)	zoom 🖸 💽

Here we will use the "Choose files" method. Click on **Choose files**, find the files on your computer and select all desired photos or files (e.g. Appraisals) and click the **Open** button to start uploading all selected photos:



The uploaded photos and files go into the section Photos, appraisals and other files:



Repeat the process with the other rooms. You do not need to wait for one group to complete uploading before starting the next.

### How to upload all photos and files (not by room)

If you are not separating your inventory by rooms, just use the central upload page to upload all files and photos of the division or inventory.

Go to the central upload page by clicking **Properties and assets** in the menu:



Then click the button Files, photos and upload:



Here you can either...

- click the Choose files button, or
- drag and drop files to the dashed box on the right of your screen:

<b>Fair</b> Split	Admin 🗸	Change d	livision 🗸				Welcome back, Bruce.	🖍 Account	🕒 Log out
Smith downsize	<b>"II</b> Ove	rview	♠ Properties and assets	💄 Реор	ple	Rounds	Reports	Need help	)?
Properties									
Upload photos a	and files	or ass	ign from below		0 uploads in t	he queue.			A.
You can upload any type of certificates, and any suppo	f file: photos, a rting file.	ppraisals, i	receipts, invoices, manuals,	warranty			Drop photos and		
Chosen files will end up in room or asset, navigate to	the current div the desired loc	ision (Unas cation first,	ssigned). In order to upload f then choose the files.	iles into a			files here		
While uploading is in progra assets, edit them and even there will be a confirmation	ess, you can s I enqueue mor	afely navig e uploads.	ate among properties, room It's safe, if you try to navigat	s and æ away					Ŧ
✓ Unassigned									
(No files)									Zoom QQ
> Attic									
Basement									
Bathroom									
Bathroom - master	r								
Bedroom - guest									

Before explaining how to upload photos or files (e.g. Appraisals), a few notes about the bottom half of this page. This consists of accordion panels where the files go after the upload.

panel.

All files initially go to the

•

✓ Unassigned

From here, they can be assigned to a room.

• If the inventory or division has only one property, the other panels will contain only room names:

✓ Unassigned
(No files)
> Attic
> Basement
> Bathroom
Bathroom - master
> Redroom - quest

• However, if you have two or more properties, you will see the property name followed by the room name:



To upload photos using the "Choose files" option, click on the **Choose files** button. Go to the folder on your computer where the files are saved and select the desired files and photos. Then click, **Open**:



When each file is uploaded, it will go to the **Unassigned** panel:



#### Upload photos and files or assign from below

#### 🗁 Choose files

You can upload any type of file: photos, appraisals, receipts, invoices, manuals, warranty certificates, and any supporting file.

Chosen files will end up in the current division (*Unassigned*). In order to upload files into a room or asset, navigate to the desired location first, then choose the files.

While uploading is in progress, you can safely navigate among properties, rooms and assets, edit them and even enqueue more uploads. It's safe, if you try to navigate away there will be a confirmation.



After all the files are uploaded, you can move the files from the **Unassigned** panel to the rooms they belong.

## 4.5.3 How to move photos to a room

Each photo and file has a **Select** button. Click on it to select the file. When you click on the **Select** button, it becomes **Unselect**.

To quickly assign photos to a particular room, select all the photos that correspond to that room:



When at least one photo is selected, a floating box appears at the bottom of the screen. It displays the selected file count and two controls for moving or deleting:



To move the files click on **Move selected files(s) to room** and then select one of the rooms:

6 selected files		0
Move selected file(s) to room • or	Delete files	
fter moving the files, they will appear in t	ne target room:	
Bedroom - master		
✓ Dining		



> Front garden

Repeat this process with the other images until all images are in their corresponding room.

#### 4.6 Listing assets

After uploading all the photos, it is time to list the assets in them.

There are multiple ways to list the assets:

- Recommended: let Al list the assets, from the uploaded photos, and just revise its work.
- Rename photos and then have FairSplit create assets from them.
- Upload an already prepared spreadsheet, to import its data.
- Manually list assets on the grid.

What if I am listing boxes or storage units, not rooms? We recommend using the Rooms feature to express box numbers, storage unit back, storage unit front etc. And we do **not** recommend using categories for that purpose. Add numbers with zeros on the left, such as "Box 001", in order for these to sort correctly in reports.

Prefixing an asset name can be used for other purposes too. For example, "NMB" may indicate items that should be moved to the "new master bedroom".

## 4.6.1 Listing with AI

This user manual does not yet cover our best method of listing assets - using Artificial Intelligence. For more information on AI listing, please watch...

- a video tutorial on <a>app.fairsplit.com</a>
- or on our YouTube channel: <a href="http://www.youtube.com/@DivvyMaster">www.youtube.com/@DivvyMaster</a>

# 4.6.2 What is the difference between "Est. dimensions" and "Approx. dimensions"?

When taking photos you can juxtapose something for scale reference: a tape measure, yard stick, ruler or dollar bill.

If the AI sees a scale reference device on the photo, it writes "Approx. dimensions". If not, it writes "Est. dimensions".

## 4.6.3 How to list an asset for each photo

After uploading all of the photos in a room, you can convert those that have a single asset to be listed into assets, ONLY when each photo represents a single asset. In those cases, this will save lots of time.

Click the photo to open it:



Click the photo name at the top and add a descriptive title. This title will become the name of the asset after the conversion. You can also add detailed information by clicking on the bottom of the photo and everything typed there will be part of the asset's detailed description after converting the photo into asset.

Press **OK** to save it:



Then do the same with all the photos of the room you want to convert into assets and finally click the "List an asset for each photo ..." The only thing left to do is assign the listed asset a category.

**NOTE:** If multiple assets are to be named in a single photo, do not use the photo renaming, as it will associate the photo with that single asset and it will not be available to use to associate with other assets. In other words, list assets from a multiple item photo in the table and then associate the same photo with each specifically:

Tota	al assets in th	is room: 32 -	Selected as			
CI	lick here for tip:	s on how to m	anage asset			
Lis	st an asset for	each photo.				

A confirmation window will appear explaining what the conversion of photos in assets will do and giving the option to convert even photos that did not have the title changed. Click **Confirm**:



You will be notified about how many assets were created:



The assets will appear on the grid with the names used in the title of the photos. You will only need to edit the Category that will show as **From image** to Furniture, Artwork, etc:

Distribute	Details	#	Asset 🔺	Mkt value	Category	
Search	ŧ		Search	Search	Search	
Divide	Ø	99	African standing woman statue	\$500	From image	
Divide	Ø	100	Alaskan statue hippo	\$1,000	From image	
Divide	Ø	103	Antique with Brass Pot-Corn husker	\$200	From image	
Divide	Ø	188	Brass Tub	\$50	From image	
Divide	Ø	93	Coffee Table	\$250	Keep - Furniture	
Divide	Ø	92	Couch	\$200	Furniture	
Divide	Ø	95	End Tables	\$300	Keep - Furniture	
Divide	Ø	203	Eskimo child	\$400	Art/collectibles	
Divide	Ø	101	Lamp	\$50	Furniture	
Divide	Ø	200	Long sofa table	\$400	Keep - Furniture	
Divide	Ø	91	Love Seat	\$100	Furniture	
Divide	Ø	208	Man and woman stone	\$2,000	Keep - Art	
Divide	Ø	187	Matching Lamps,	\$150	Accessories	
Divide	Ø	88	Overall photo of Family Room			

You can click on the **paper clip** icon to see the details of the assets and the photo:

## African standing woman statue \$500 Brass or wood woman Location: Camarillo House / Family room Category: Keep - Art Brand: Model: Year: Destination: Divide 🖍 Edit

#### > Upload photos and files into "African standing woman statue"

#### Asset files



# 4.6.4 Associating assets with photos and files

After adding the assets, you can associate the photos and files with the assets. This way the assets can be more easily identified.

Tip: More than one asset can be associated with a photo or file. This is helpful for group shots of small items, or when wide shots include many named assets. If you listed assets from photos, the photos are already associated with those named assets.

Then click the box, All assets of this division:



In this example, we want to associate a photo of a chair with the asset named "Chair":

<b>A</b>	FAIRSPLI	[T Ad	min 👻 Change di	vision 👻				Welcome back, Bruce.	🖍 Account	🕒 Log out
Smit	h downsize		II Overview	♠ Properties and assets	L Peopl	e	Rounds	Reports	Need hel	p?
Prop	erties / Assets									
As	sets 🛛									🔳 Report 🗸
Ente	r new Asset nan	ne / descrip	tion	\$ Mark	tet value Big	g house 🔻	No room	• Furniture	● Add a	asset
Ş	Distribute	Details	Asset 🔺		Mkt value	Property	Room		Category	
Ē↓	Search	+	Search		Search	Search	Search		Search	
~		۲	Chair		\$475	Big house	Living		Furniture	A
~		۲	Crystal display cabir	net	\$4,500	Big house	Living		Furniture	
$\sim$		۲	End table		\$500	Big house	Living		Furniture	
$\sim$		۲	Living room center ta	able	\$2,500	Big house	Living		Furniture	
		۲	Marble end table		\$1,250	Big house	Living		Furniture	
Tota	al assets: 5 - Sele	ected asse	ets: 0 - Selected asse	ts mkt value: \$0						Ţ

Click on the **eye icon** to show the asset details. This grid view, with Enter New row is a great way to quickly list the assets seen in the room photos. The Room, Property and Category stay constant from one new entry to the next until they are manually changed, so sometimes it can be fastest to list all furniture items, then artwork, etc.:

Tip: This is where having more than one Lister role, allows siblings or other parties to take on some of the tasks of getting things listed. If you have someone helping, let them know which rooms they can list assets for, or have them improve the asset names, etc.



Here you can edit the asset information and associate the file(s) and photo(s) directly to the asset:



To modify the asset details, click **Edit**:



To add files and photos to the asset, click **Upload photos and files...**:

#### > Upload photos and files into "Chair"

At the bottom of the page there are two sections. The first is "Asset Files" which is currently empty. The other is "Room Files". This can include photos and files (e.g. Appraisals, notes, etc.):

#### Asset files

(No files)

#### Room files



Click the **Select** button on the photo of the chair. The button is replaced by an **Unselect** button, indicating that the photo has been selected correctly:



When photos or files are selected, a panel appears at the bottom of the screen. This allows you to:

move them to another room,
 delete them, or
 assign them to the current asset. To do this, click the blue button "Associate with asset":
 **1 selected file** Move selected file(s) to room
 or
 Delete file
 Associate with asset

Now the selected photo also appears in the **Asset files** section. The photo also stays in the room and can be associated with other assets shown in the photo. In the case that you have multiple photos of a single item or an appraisal of that item, these can all be associated with that asset:

#### Asset files



#### Room files



To return to the previous page with the grid containing the assets of the division or inventory, click the **Back** button on your browser or click on **Assets** on the "breadcrumb trail" at the top of the page, just below the menu:

ize	Overview	
3ig house / Living /	Assets / Chair	

Each asset that has a file or photo associated with it will have the **eye icon** replaced with an icon of a paper clip, indicating that the asset contains files or photos:

	Asset 🔺	Mkt value
	Search	Search
Ø	Chair	\$475
Ø	Crystal display cabinet	\$4,500
۲	End table	\$500
۲	Living room center table	\$2,500
۲	Marble end table	\$1,250

## 4.6.5 How to add custom assets

FairSplit offers three ways to add assets to a division or inventory.

Use the **quick form** to manually add assets to room and edit to improve the asset names later. Here's how:

First click **Properties and assets** in the menu:



Select the property name in the properties list. For example, "Big house":



Now enter one of the rooms to add assets. For example, **Living**:

# Property: Big house 🖄

#### Rooms

Add room

Click a room below to add photos, files and assets:

- â Attic
- Basement
- Bathroom
- Bedroom guest
- â Dining
- 着 Family room
- 💼 Kids playroom
- 💼 Kitchen
- â Laundry
- 💼 Living

Next, click Room assets:



<b>FAIR</b> SPLIT	Admin <del>-</del> Change d	livision 🗸
Andre inventory 2	I Overview	♠ Properties and assets
Properties / Smith's Home /	Living	
Room: Living 🖾	Room assets	Quickly add assets
> Upload photos and fi	les into "Living"	
Photos, appraisals and	d other files 🛛 🕄	

This page will list the assets associated with this room. At the top there is a horizontal form to add new assets and the photos of that room appear on the same page:

	dmin 👻 Change division 👻				Welcome back,	Bruce. 🖍 Account	🕒 Log out
Smith donwsize	I Overview	nd assets	💄 Peopl	e 🕨 Ro	unds 🕒 Report	s 😯 Need hel	p?
Properties / Big house / Living	g / Assets						
Assets o							🔳 Report 🗸
Enter new Asset name / descrip	otion	\$ Marke	et value Biç	g house 🔻 Living	▼ Categ	ory Add a	asset
Click here for tips on how to m	nanage assets (edit, delete, details)		Mistualua	Droporty	Deem	Cotogony	
E E Search ↓	Search		Search	Big house ×	Living	Search	
Total assets: 0 - Selected asse	ets: 0 - Selected assets mkt value: \$0						×

Complete the form, s	pecifically the	e Asset Name an	d Fair Mar	ket Value (	if values a	are wanted):		
	min 🗸 Change d	ivision 🗸				Welcome back, Bruce.	🖍 Account	🕒 Log out
Smith downsize	I Overview	♠ Properties and assets	👤 Peop	ble	Rounds	Reports	Need help	?
Properties / Big house / Living	/ Assets							
Assets o								🔳 Report 🗸
Enter new Living room center tab	ble	\$ 2500	E	ig house	Living	• Furniture	O Add as	sset
* The asset name above is what Example: Andrew Wyeth origina	t divisees will see wh al - Christina's World	ien choosing items, so ma	ke it a good des	criptive name.				
framed etc.	anage assets (edit, de	lete, details)						
S Distribute Details	Asset 🔺		Mkt value	Property	Room		Category	
Et Search ↓	Search		Search	Big house	× Living	×	Search	
								*
Total assets: 0 - Selected asse	ets: 0 - Selected asse	ts mkt value: \$0						

Tip: The asset name is most important, as it is what divisees see when choosing items, so make it a good descriptive name. (for example – coffee table, rectangular light oak and glass - not just: "coffee table", or: large framed oil painting of forest and cabin – not just: "oil painting")

Tip: If your family has indicated most items are not wanted, don't waste your time listing every item or asset in the house. List only the items you think at least one person may want. This will save you lots of time, and in the Asset Review Round all Divisees can indicate if they don't see something they would like for you to add, or if you allow Listing Roles, they can add themselves. But do put photos of the contents of all rooms so you have full transparency and everyone will have the same chance to list things not listed before they are sold or donated:

Enter new	Living room center table	\$ 2500

Other fields are for the name of the property, room name and category, for instance, "furniture" or "artwork". The fastest way to add assets is to stick with the same category and room until items of that group are listed. The field "category" needs to be filled in, but it will remain the same for the next item. Having the assets list organized by

room and category makes the work to add them fast, because this data is kept constant until one manually changes the names as one lists items, so only the names and values of the assets are needed for the next items.

One may choose to enter names only and do values later, or have another Participant (Valuator) assign MV or Market Values. Sometimes this may be an independent third party or an appraiser. Some families opt to not have values, or only for items over some fairly high value like 500 or \$1000.

If part of the distribution is determining who assumes certain debts or liabilities, a negative \$ value may be entered to reflect a negative value. This most often comes into play for divorce divisions.

)
---

The last field is for a detailed description of the asset, where you can add details like size, condition, brand, appraisal notes, or even a story about the asset meaningful to your family. We do not have it broken down into brand, model number, date purchased, etc. like an insurance inventory because usually family members are already familiar with the assets.

Note: if all parties to a division are familiar with the items, less description is needed. Often in divorces and estate divisions all parties are familiar with the items, so little is needed beyond a good item name to identify it:

Detailed description. Include details such as dimensions, size, material, condition, where purchased, how framed etc.

The last step is to click the **Add Asset** button (far right) to add the new asset. **Add Asset** also serves to "save" the entry:

#### Add asset

Each additional asset will appear in the grid below the form as you can see in the following image:

1	FairSpl	IT Ad	lmin <del>-</del> Change d	livision <del>-</del>				Welcome back, Bruce.	🖍 Account	🕒 Log out
Smit	h downsize		I Overview	♠ Properties and	assets	People	► Rounds	Reports	O Need help	p?
Prop	erties / Big hou	se / Living	Assets							
As	sets 🛿									🔳 Report 🗸
Ente	er new Crystal d	isplay cabin	et	\$	4500	Big house 🔻	Living	▼ Furniture	😏 Add a	asset
pe fra	xample: Andrew Wyeth original - Christina's World Detailed description. Include details such as dimensions, size, material, condition, where purchased, how framed etc.									
s	Distribute	Details		iere, details)	Mkt value	Property	Room		Category	
E+	Search	+	Search		Search	Big house	e × Living	×	Search	
T		۲	Chair			\$475 Big house	Living		Furniture	A
~		۲	End table			\$500 Big house	Living		Furniture	
~		۲	Living room center	table	\$2	2,500 Big house	Living		Furniture	
~		۲	Marble end table		\$1	,250 Big house	Living		Furniture	
										*
Tota	al assets: 4 - Sel	ected asse	ets: 0 - Selected asse	ets mkt value: \$0						

## 4.6.6 How to move assets

FairSplit offers a way to move an asset from a property or room to another.

Click the paperclip or eye icon to open the detailed view of the asset:

Ø	15	Coffee Table-wooden coffee table
Ø	7	Lady at the Beach-Framed-Recommend Appraisal
Ø	1	Miscellaneous (Bathroom)-Chair(1); Wood pedastal
Ø	11	Overall photo of Master BR
Ø	14	Paintings-Meadows;water color white frame
Ø	5	Picasso prints (group of 2)
Ø	10	Roster/Wind Mill Paintings (2 framed Picasso prints)
Ø	4	Small Macthing Vases-Painted Ceramic
Ø	9	Standing Lamp-Floor lamp;stained glass
Ø	12	Television-37"
Ø	6	White/Gold Lamps (2)

Wit	h asset details open, c Roster/Wind Mill	lick the <b>Edit</b> but	ton: <b>framed Picasso prints</b> )	
	(No description)	Location:	Camarillo House / Bedroom - master	
		Category:	From image	
		Brand:	-	
		Model:		
		Year:		
		Destination:		
		I		

## > Upload photos and files into "Roster/Wind Mill Paintings (2 framed Picasso prints)"

#### Asset files



Then click the select control and choose the new room to which the asset should be moved:

oom	
Bedroom - master	•
No room assigned	
Bedroom - guest Bedroom - master	
Dad's office	
Dining	
Family room	
Garage	
Hallway	
House exterior	
Kitchen	
Laundry	
Living	
Office - study	
Susan's bedroom	

#### And finally, click the **Save** button:

|--|

Please note that if you move an asset to a new room, you may also want to move the associated photo (if there is one) to the new room as well. The photo stays in the current assigned room unless it is move separately.

# 4.6.7 How to upload an inventory spreadsheet

You can import an existing inventory into FairSplit by adapting a spreadsheet and uploading it. FairSplit will import properties, rooms, assets and categories. The spreadsheet must be in the XLSX (Excel) format and must have its data under certain headers.



The system automatically creates a property named **Property 1**.

Since you will instead be uploading a spreadsheet, you need to delete the default property by clicking on the trash icon:



A confirmation box will appear. Click the**OK** button and the property will be deleted:

Really delete the property "Property 1"? All rooms within this property will also be deleted. No assets will be deleted. If you wish to delete the assets, please cancel and do so manually first.	
OK Cancelar	

Now there is no property in the "Smith downsize" division. All assets and information about properties, rooms and assets will be imported through a spreadsheet, which must first be properly structured for compatibility.

Note: FairSplit supports LibreOffice Calc or Microsoft Excel. If you have a home inventory exportable only in PDF, it will need to be converted to a compatible spreadsheet format.

To structure your spreadsheet, download the sample spreadsheet from FairSplit.

Open the file. If you already have an inventory spreadsheet, change the headers to match FairSplit's (see **Spreadsheet Rules** below). If you don't have a spreadsheet, but prefer to work in a spreadsheet, start populating FairSplit's sheet with the relevant information and save it to your computer.

Note: FairSplit will not only add assets, but also the properties and rooms associated with the division or inventory.

## 4.6.8 Spreadsheet rules

- The spreadsheet must contain all of these headers on the first row:
  - Name
  - Market value
  - Property
  - Room
  - Category
  - Description
  - Brand
  - Model
  - ∘ Year
  - Action
  - Divisee
  - $\circ$  Files
- The columns may be in a different order that does not matter.
- Only the Name column is required, meaning it must be filled out in each row of the spreadsheet. However, there is an 80-character limitation on it. Anything longer must go into the Description column.
- The Market value column must contain numbers, or be blank.
- The Property column must be filled in when you specify a room, because the room belongs to a property.
- The Action column has only a few valid options: "divide", "donate", "sell", or "sell or donate". It may also be left blank.
- The Divisee column, if not left blank, must contain the name of an existing beneficiary you cannot add divisees through importing a spreadsheet.
- The Files column can contain the names of existing files, images and photos (already uploaded to your inventory) one file per line within the cell. This will cause the file(s) to be associated with the asset being

imported. If the file is not yet inside a room, but the asset being imported is, then the file will be ported to that room, too.

- The import process reuses existing properties and rooms, but does not update existing assets. It only creates more assets. Importing a spreadsheet twice results in duplicated assets.
- An XLSX file may contain several worksheets. The one named "Assets", or the first one, will be chosen for importing.
- Save your file in the XLSX format (the old XLS format won't work).
- You may save the spreadsheet in the CSV format, using these options:
  - CSV separator/delimiter: , (comma)
  - Text encoding: UTF-8

Here is a sample spreadsheet with information added:

	Ca	marillos_Estate_2019-	06-17_22-46-23.xlsx - Libre	ffice Calc
File Edit View Insert Format Styles Sheet Data Tools Window	/ Help			
	-> - 📿 Abg 📻 - 🔳 - UA 🗄	ነ ሰ 😨 👿 🌪	🚺 Ω 🖙 🥃 🗌	
Calibri 🔹 11 🔹 🗟 🖉 🧕 🖳 🗉 🚍	: = 🖚 🖮 🗉 🖃 🐶	- % 0.0 🛐 號	🔐 🔁 🔚 - 👘	· 🛄 · 🧮 ·
B2 • 9x L =				
A	BC	D	E	F
1 Name	Market value Property	Room	Category	Description
2 Antique ChairWood chair;green fabric	Camarillo House	Bedroom - master	From image	
3 Bed-King bed;ornate wooden frame	Camarillo House	Bedroom - master	From image	
4 Collee Table-wooden collee table	Camarillo House	Bedroom - master	From image	
5 Lady at the Beach-Framed-Recommend Appraisa	Camarillo House	Bedroom master	From image	
7 Overall photo of Master BP	Camarillo House	Bedroom master	From image	
Paintings-Meadows-water color white frame	Camarillo House	Bedroom - master	From image	
Picasso prints (group of 2)	Camarillo House	Bedroom - master	From image	
10 Roster/Wind Mill Paintings (2 framed Picasso prints)	Camarillo House	Bedroom - master	From image	
11 Small Marthing Vases-Painted Ceramic	Camarillo House	Bedroom - master	From image	
12 Standing Lamp-Floor lamp:stained glass	Camarillo House	Bedroom - master	From image	
13 Television-37"	Camarillo House	Bedroom - master	From image	Samsung flat screen 37" TV
14 White/Gold Lamps (2)	Camarillo House	Bedroom - master	From image	······
15 Wooden cabinet with sink - installed stays w house	Camarillo House	Bedroom - master	From image	
16 Wood Framed Mirror	Camarillo House	Bedroom - master	From image	
17 1840s empire chest of drawers	\$200 Camarillo House	Living	Furniture & Furnishings	47-1/2"W x 23-1/2"D x 49-1/2"H
18 1920s reproduction wooden flip top tea table	\$85 Camarillo House	Living	Furniture & Furnishings	Mahogany veneer top, 30"D x 29"H.
19 30s-40s Hollywood Regency-style 28"D round mirror	\$300 Camarillo House	Living	Furniture & Furnishings	
20 Antique flip-top writing desk	\$200 Camarillo House	Living	Furniture & Furnishings	With attached pencil box, 36"W x 23"D x 33"H.
21 Antique mahogany secretary desk	\$500 Camarillo House	Living	Furniture & Furnishings	Has some damage, hardware appears to have been replaced twice, 39"W x 43-12/"H x 20"D (35"D
22 Antique marble top wooden footed chest	\$150 Camarillo House	Living	Furniture & Furnishings	With four drawers, Imperial Furniture Co, Grand Rapids, MI, 19"W x 14"D x 29-1/2"H.
23 Antique wood frame armchair	\$100 Camarillo House	Living	Furniture & Furnishings	With upholstered cushion back, seat and armpads.
24 Black TV stand with two glass shelves	\$40 Camarillo House	Living	Furniture & Furnishings	
25 Brass and blue glass lamp	\$50 Camarillo House	Living	Furniture & Furnishings	with birds and flowers planted on it, with slik shade.
26 Brass and porceiain lamp	\$50 Camarillo House	Living	Furniture & Furnishings	with wateriord slik lamp shade.
27 Brass triple candiestick style colonial lamp	\$30 Camarillo House	Living	Furniture & Furnishings	Electric and condicidet four arm
28 Candimento style brass and wood lamp	\$75 Camarillo House	Living	Furniture & Furnishings	Electric and candle light, four-arm.
29 Capoulinonte-style diesser lamp	\$50 Camarillo House	Living	Furniture & Furnishings	With took wood trim 5 motol circle insets at too and bottom yoov beauv
21 Celadon ginger iar shaned lamp	\$150 Camarillo House	Living	Furniture & Furnishings	With teak wood timin, 5 metal circle insets at top and bottom, very neavy.
22 Ceramic ginger jar shaped lamp	\$60 Camarillo House	Living	Furniture & Furnishings	With gate initial and six strate.
33 Chapman hand-painted folk art mirror	\$250 Camarillo House	Living	Furniture & Furnishings	Made in Spain Spain triver loss on mirror 42-1/2"H x 17-1/2"W
34 Chateau du Vallois reproduction writing desk	\$300 Camarillo House	Living	Furniture & Furnishings	Handcrafted by Theodore Alexander (top does not close all the way) 29"W x 17"D x 31-1/2"H
35 Cherry drop-leaf, gate leg table	\$150 Camarillo House	Living	Furniture & Furnishings	44"L x 70-1/2"W (25-1/2"W with sides down), one extra leaf, significant corner damage from moist
36 Clear glass and brass ginger iar shaped lamp with silk shade	\$50 Camarillo House	Living	Furniture & Furnishings	
37 Cloisonne ginger jar lamp	\$40 Camarillo House	Living	Furniture & Furnishings	
38 Country Estate by Drexel three-drawer wooden dresser	\$50 Camarillo House	Living	Furniture & Furnishings	28"W x 14"D x 29-1/4"H
39 Custom-made wool sculpted area rug,	\$300 Camarillo House	Living	Furniture & Furnishings	96" x 138-1/2"
40 Custom upholstered floral armchair	\$75 Camarillo House	Living	Furniture & Furnishings	By H.C. Heath Upholstery, Duluth, MN.
41 Custom-upholstered slipper chair	\$125 Camarillo House	Living	Furniture & Furnishings	
42 Custom upholstered three-cushion skirted sofa	\$300 Camarillo House	Living	Furniture & Furnishings	7'-21-1/2"L x 36"D
43 Custom upholstered two cushion skirted loveseat	\$225 Camarillo House	Living	Furniture & Furnishings	56"L x 30"D
44 Custom upholstered wingback skirted armchair	\$125 Camarillo House	Living	Furniture & Furnishings	
IF Deserative wood framed mirror	tEO Comorillo Unico	T halman	Furniture C Furnichinge	
( ( ) ) 🕂 Sheet1				

If your inventory has photos and files, make sure that the file names in the **files** column are identical to the uploaded file names, including the extension:
(a.e.					E		Ē .	c	alibri		· 11	· A	A	= =	= =	\$>	<mark>≣</mark> Qı
droom ma	aster		<b>- - - - - + - - + - + - + - + - + + + + + + + + + +</b>	Search Bedroom n	naster		Colar	J	NI	<u>s</u> -	····· •	🔕 - 🔒	<u>A</u> -	<b>E</b> 1	E =	<. >	•a• M
			-			Área	de Transfe	- Fa		F	onte		- Fa				Alinhame
e show	Print	E-mail	Burn	New folder	<b>•</b>		F17				f <sub>x</sub>						
							E						F				
	A State				1 A.	1	Roo	m					File	2			
1	T	COL	2 (1)			2	Bedroom	- maste	e Antio	que C	hairWo	od chair	-gree	en fabr	ic.jpe	g	
	ntique	Red	Ving	Coffee		3	Bedroom	- maste	e Bed-	King	oed-orn	ate woo	oden	frame.	.jpeg		
Chi	airWood	bed-	ornate	Table-wooden	Beach-F	4	Bedroom	- maste	e Coffe	ee Tak	ole-woo	oden cof	fee t	able.jp	beg		
cha	ir-green	wo	oden	coffee table.jpeg	econ	5	Bedroom	- maste	e Lady	at the	e Beach	-Framed	l-Rec	omme	nd Ap	praisal.j	peg
fab	oric.jpeg	fram	e.jpeg		Appra	6	Bedroom	- maste	e Miso	ellane	eous (B	athroom	i)-Ch	air(1)-	Wood	pedest	al.jpeg
	YEI				18	7	Bedroom	- maste	e Over	all ph	oto of I	Master B	R.jpe	≥g			
	1.11				1	8	Bedroom	- maste	e Paint	tings-	Meado	ws,wate	r col	or whit	te fran	ne.jpeg	
					100	9	Bedroom	- maste	e Picas	so pr	ints (gro	oup of 2)	).jpe	g			
1	1 1				20	10	Bedroom	- maste	e Roste	er-Wi	nd Mill	Painting	gs.jpe	≥g			
						11	Bedroom	- maste	e Smal	l Mac	thing V	ases-Pai	inted	Ceram	nic.jpe	g	
Lamp	-Floor.jpeg	mirro	or.jpeg	Miscellaneous.jp	Night	12	Bedroom	- maste	e Stan	ding L	amp-Fl	oor lamp	p-sta	ined gl	ass.jp	eg	
				-9		13	Bedroom	- maste	e Telev	vision	-37.jpe	g					
_					÷١	14	Bedroom	- maste	e Whit	e/Go	ld Lamp	s (2).jpe	≥g				
						15	Bedroom	- maste	e Woo	den c	abinet	with sin	k - in	stalled	stays	w house	e.jpeg
		1	8			16	Bedroom	- maste	e Woo	d Frar	med Mi	rror.jpeg	g				
	and and				11	17											
ove	rall.jpeg	Picass	o prints	Roster-Wind mill	stan	18											
						19											

Remember that you need to upload the files before importing the spreadsheet.

Under **Properties and Assets**, click the **Files, photos and upload** button:



Here you can either click the **Choose files** button or drag and drop files to the dashed box on the right of your screen:

<b>Fair</b> Split	Admin - Change o	livision 🗕			Welcome back, Bruce.	🖍 Account	C+ Log out
Smith downsize	II Overview	♠ Properties and assets	L People	Rounds	Reports	Need help	?
Properties							
Upload photos a Choose files You can upload any type of certificates, and any support Chosen files will end up in th room or asset, navigate to th While uploading is in progre assets, edit them and even of there will be a confirmation.	nd files or ass file: photos, appraisals, ting file. he current division ( <i>Una</i> he desired location first, ss, you can safely navig enqueue more uploads.	sign from below receipts, invoices, manuals, w ssigned). In order to upload file then choose the files. gate among properties, rooms It's safe, if you try to navigate	0 upload arranty es into a and away	ds in the queue.	Drop photos and files here		×
✓ Unassigned							
(No files)							Zoom QQ

Go to the folder on your computer where the files are saved and select the desired files and photos. Then click, **Open**:

Tip: It is a good idea to have your files be relatively small, 100 KB since they will be viewed online, higher resolution isn't needed and FairSplit resizes. Larger photos can be used, but the bigger the file, the longer it will take to upload.

📀 Open						x
😋 🖉 🔻 samı	ple divi	sion 🕨 Camarillo Ho	ouse 🕨 Bedroom master	✓  Search	n Bedroom master	٩
Organize 🔻 New	folder				<b>• •</b>	0
<ul> <li>★ Favorites</li> <li>■ Desktop</li> <li>▶ Downloads</li> <li>™ Recent Places</li> <li>₩ Libraries</li> <li>▶ Documents</li> <li>▶ Music</li> <li>■ Pictures</li> <li>▶ Videos</li> </ul>	A E	Antique ChairWood chair-green fabric.jpeg	Bed-King bed-ornate wooden frame.jpeg	Coffee Table-wooden coffee table.jpeg	Lady at the Beach-Framed-R ecommend Appraisal.jpeg	* III
🤣 Homegroup		Lamp-Floor.jpeg	mirror.jpeg	Miscellaneous.jp	Night Stands	
1특 Computer 실 Local Disk (C:)	Ŧ					Ŧ
F	ile nan	ne: "Antique ChairWo	ood chair-green fabric.jpe <u>c</u>	g" "Bed-Kir 🔻 Todos o Op	os arquivos (*.*) Den Cancel	•

After all the files are uploaded, the spreadsheet can be imported. Go back to the central upload page by clicking **Properties and assets** in the menu:



Click the **Import spreadsheet** button:



This is the **Import assets spreadsheet** page wherein the rules to create the spreadsheet are defined. Click the **download an example spreadsheet**:

Smith downsize	I Overview	♠ Properties and assets	L People	Rounds	Reports	• Need help?
Properties						
Import assets spre	eadsheet			You can	create assets, rooms a	nd properties — all at once — if
In LibreOffice Calc or MS Exce	l, prepare a spreads	heet with all of these <b>headers on</b>	the first row:	you prep	pare a file that FairSplit	understands. Here is how.
Distribute	Asset	Mkt value	Property		Room	Category
To save time, you can downloa The columns may be in a differ Only the <i>Name</i> column is requi spreadsheet. However, there is into the <i>Description</i> column. The <i>Market value</i> column must The <i>Property</i> column must be belongs to a property. The <i>Action</i> column has only a donate". It may also be left blat The <i>Divisee</i> column, if not left I you cannot add divisees throug	d an example sprea ent order — that do red, meaning it mus s an 80-character lin contain numbers, o illed in when you sp iew valid options: "di nk. plank, must contain t th importing a sprea	dsheet. es not matter. t be filled out in each row of the <b>mitation</b> on it. Anything longer mu: r be blank. ecify a <i>Room</i> , because the room vide", "donate", "sell", or "sell or the name of an existing beneficiary dsheet.	st go / —			
The import process reuses exists assets. It only creates more a assets. An XLSX file may contain seven will be chosen for importing. Save your file in the XLSX form follows the parameters on the to Finally, please upload the result	sting properties and issets. Importing a s ral worksheets. The hat (the old XLS form ight. Iting file by clicking t	rooms, but does not update existir spreadsheet twice results in duplica one named "Assets", or the first o nat won't work). CSV is okay if it he button below, or dropping the fil	ng ated CSV options Instead of the 2 these options: • CSV sep • Text enc	S KLSX format, yc arator/delimiter oding: <b>UTF-8</b>	ou may save the spread: : , (comma)	sheet in the CSV format, using



To import the spreadsheet, click the **Choose File** button at the bottom of the **Import assets spreadsheet** page:



Select the spreadsheet file and click **Open**:

📀 Open						×
Coover a los	al Disk	k (D:) ▶ fairsplit ▶ pdf manual ▶ big_house ।	• spreadsheet	👻 🍫 Search s	preadsheet	٩
Organize 🔻 Ne	v folde	er				1 🕜
Nesktop	*	Name	Date modified	Туре	Size	
🗼 Downloads 📃 Recent Places		Smith_downsize	6/25/2016 6:18 PM	Planilha do Micro	7 KB	
C Libraries → Music Fictures Videos						
🤣 Homegroup	=					
P Computer Local Disk (C:)						
	•					
	File na	ame: Smith_downsize		All Files     Open	<b> </b> ▼ Can	▼ ncel

The system redirects you to the assets page where you can see that all the information was imported into the system:

				А	spreadsheet with 174 lines has been import	ed.		×	
Prop	erties /	Assets							
As	sets	9							I Report ◄
Ente	r new	Asset nan	me / descrip	tion	\$ Market valu	ie Big hou	use 🔻 No room	▼ Category	€ Add asset
O CI	ick here f	for tips or	n how to m	anage as	sets (edit, delete, details)				
S E	Distrib	ute	Details	#	Asset 🔺	Mkt value	Property	Room	Category
Ę↓	Searc	h	+		Search	Search	Search	Search	Search
~			Ø	3	Antique ChairWood chair;green fabric		Camarillo House	Bedroom - master	From image
			Ø	13	Bed-King bed;ornate wooden frame		Camarillo House	Bedroom - master	From image
			Ø	15	Coffee Table-wooden coffee table		Camarillo House	Bedroom - master	From image
			Ø	7	Lady at the Beach-Framed-Recommen		Camarillo House	Bedroom - master	From image
			Ø	1	Miscellaneous (Bathroom)-Chair(1); W		Camarillo House	Bedroom - master	From image
			Ø	11	Overall photo of Master BR		Camarillo House	Bedroom - master	From image
			Ø	14	Paintings-Meadows;water color white fr		Camarillo House	Bedroom - master	From image
			Ø	5	Picasso prints (group of 2)		Camarillo House	Bedroom - master	From image
			Ø	10	Roster/Wind Mill Paintings (2 framed Pi		Camarillo House	Bedroom - master	From image
			Ø	4	Small Macthing Vases-Painted Ceramic		Camarillo House	Bedroom - master	From image
			Ø	9	Standing Lamp-Floor lamp;stained glass		Camarillo House	Bedroom - master	From image
			Ø	12	Television-37"		Camarillo House	Bedroom - master	From image
			Ø	6	White/Gold Lamps (2)		Camarillo House	Bedroom - master	From image
			Ø	2	Wood Framed Mirror		Camarillo House	Bedroom - master	From image 🗸
Tota	al assets	: 173 - S	selected as	ssets: 0 -	Selected assets mkt value: \$0				

If you click **Properties and assets** in the menu, you can see that the property – "Big house" and rooms – 18 rooms – were added:



# 4.6.9 How to import an inventory done in another app

If you already have an inventory taken through another app, you can adapt the data and import the asset information into FairSplit.

Most apps will have an Export Inventory function. Export to a spreadsheet format such as Excel or CSV.

Then, in a FairSplit inventory:

- From the division menu, choose "Properties and assets".
- Click on "Import spreadsheet".
- Read the instructions on the screen about how your spreadsheet should be organized.
- Using a spreadsheet program such as LibreOffice or Excel, adapt your spreadsheet to the format expected by FairSplit.
- Go back to the FairSplit page and upload your spreadsheet to populate your inventory.



# 4.7.1 How to edit, filter and sort the grid

A creative use of the grid, to show packing, is to add box numbers to the start of the asset name, e.g. 01, 02, or 11, 12, etc. (You need the leading zero to sort correctly.)

Assets
Enter new 11 - Lladro figurine, mother an \$
* The asset name above is what divisees will see when choosing items, s Example: Andrew Wyeth original - Christina's World
Detailed description. Include details such as dimensions, size, material, framed etc.

Click on any column "Search" areas to filter by that category, room, etc.:

Asset 🔻	Mkt value	Property	Room
Search	Search	Search	Living ×
Home theater	\$940	Mom's House	Living
DVD / Blu-ray player	\$630	Mom's House	Living
Antique with Brass Pot-Corn husker	\$200	Mom's House	Living
Alaskan statue hippo	\$1,000	Mom's House	Living
African standing woman statue	\$500	Mom's House	Living
12 - Crystal stem wineglasses, set of 12	\$75	Mom's House	Living
12 - Crystal ase - 10" tall, Waterford s	\$28	Mom's House	Living
11 - Waterford glass dolphins, small 5"	\$30	Mom's House	Living

Sort by box number by clicking on the asset column header. Items prefixed with a box number show first, in order.

Asset 🔺	Mkt value	Property	Room
Search	Search	Search	Living ×
11 - Lladro figurine, mother and child st	\$75	Mom's House	Living
11 - Lldro figurine, lady playing harp	\$65	Mom's House	Living
11 - Swarovski crystal rabbit, small 3"	\$25	Mom's House	Living
11 - Waterford glass dolphins, small 5"	\$30	Mom's House	Living
12 - Crystal ase - 10" tall, Waterford s	\$28	Mom's House	Living
12 - Crystal stem wineglasses, set of 12	\$75	Mom's House	Living
African standing woman statue	\$500	Mom's House	Living
Alaskan statue hippo	\$1,000	Mom's House	Living

# 4.7.2 Default dispositions

The "Distribute" column, on the left, is where you indicate what is to be done with each asset. To do so, simply click the cell in the "Distribute" column and choose one of the dispositions from the drop-down.

Every inventory has these default disposition choices:

- ---: Every asset begins with the disposition unset. It means no disposition has been chosen yet.
- Divide: Make available to division rounds for selection by divisees.
- **Stays:** means stay with the house, e.g. if the thing is to be sold with the house.
- Keep: In downsizing, "keep" normally means "take it with me", to the new home.
- Sell: Offer through an estate sale consignment store or online sales channel.
- Donate: Dispose of an asset to people or organizations who need it.
- Sell or donate: Means not sure yet (undecided). Usually later this becomes either "Sell" or "Donate".

When an administrator is selecting assets for a new division round, the assets shown are the ones in "Divide" or unset ("---").

# 4.7.3 How to add dispositions

In addition to the default dispositions above, you can add your own.

To add dispositions click on

Distribution destinations

Type a new disposition and click the green **Add destination** button.

Change (	division 🛨	Welcome hac
Dist	ribution destinations	8
Dist	ribution destinations xisting destinations Divide Donate John's - Garage John's - Home office John's - Living John's - Kitchen	Add a distribution destination John's -Bed room
* *	Keep Sell Sell or donate Stays	S'/8 Mom's House

# 4.7.4 How to assign a disposition to multiple assets

Select the assets you want to mark for a destination by clicking on the **select** column. That's the leftmost column on the grid:

S E	Distribute	Details	#	Asset 🔺	Mkt	Proper	Ro
L↓ C	Search	+		Search	Sear	Search	S
~		۲	21	11 - Lladro figurine, mo	\$75	Mom's	Liv
~		۲	27	11 - Lldro figurine, lady	\$65	Mom's	Liv
~		۲	22	11 - Swarovski crystal r	\$25	Mom's	Liv
		۲	23	11 - Waterford glass d	\$30	Mom's	Liv
		35	elected	assets		e	€ iv
							.iv
		Dis	stribute as	sset(s) to ▼ or 🗂 Delete a	ssets		.iv
							.iv
							Fa

Click the **Distribute assets(s) to** dropdown and select the disposition:

¶	tal ase - 10" t	\$28	Mom's	Liv
< Divide	tal stem wine	\$75	Mom's	Liv
Oonate	tanding woma	\$500	Mom's	Liv
John's - Bed room	statue hippo	\$1,000	Mom's	Liv
John's - Home office	lass display c	\$450	Mom's	Fai
John's - Living	vith Brass Pot	\$200	Mom's	Liv
John's- Kitchen	med oil painti	\$2,700	Mom's	Fai
Sell	b	\$50	Mom's	Fai
Sell or donate	- GoPro	\$1,400	Mom's	Но
- Stays		<u> </u>		- Y
Bruce				8
Distribute seast(s) to	ar <b>A</b> D L			
Distribute asset(s) to *	Delete as	sets		

The "Distribute" column will show the selected disposition:

S.	Distribute Details		#	Asset 🔺	Mkt	F
È₩ Ç	Search	+		Search	Sear	
	John's - Living	۲	21	11 - Lladro figurine, mo	\$75	Ν
	John's - Living	۲	27	11 - Lldro figurine, lady	\$65	Ν
	John's - Living	۲	22	11 - Swarovski crystal r	\$25	Ν
		۲	23	11 - Waterford glass d	\$30	Ν
		۲	25	12 - Crystal ase - 10" t	\$28	V

## 4.7.5 How to remove a photo from an asset

To delete a photo from an asset, click the blue paperclip icon on the "Details" column of the grid:

Roo	om assets o					Contraction destruction destru	tinations
Ente	r new Asset nan	ne / descrip	tion	Market value Category O Add	asset		
S E	Distribute	Detai	#	Asset 🔺	Mkt value	Category	
₽	Search	Ŧ		Search	Search	Search	
		Ø	8	Black air fryer, two dials	ack air fryer, two dials Appliances		
		Ø	14	Countertop with light brown surface, 4 turquoise barstools Furniture			
		Ø	15	Tall wood and metal shelving unit		Furniture	
		Ø	9	White and gray blender		Appliances	

Each photo has a file name at the top and an **X** to remove it at the upper right corner:

## 🖍 Edit

## > Upload photos and files into "Black air fryer, two dials"

## Asset files



When you press the  $\mathbf{X}$ , a confirmation popup appears:



Press **OK** to delete the file.

But a photo is only permanently deleted when it has no remaining associations.

A photo can be associated with multiple parts of your inventory, such as:

- different assets e.g., items shown together in a single photo
- a room, for instance, an overview photo

When a photo is associated with multiple things, only the last severed association actually deletes the photo.

Suppose your photo is linked to a room and two assets:



You'd need 3 deletion steps:

- After removing from Asset A --> photo still exists in Room X and Asset B
- After removing from Asset B --> photo still exists in Room X
- After removing from Room X --> photo is now deleted

## 4.7.6 How to delete an asset

If you are on the grid and wish to delete one or more assets, select them by clicking on the leftmost column. When assets are selected, a popover appears near the bottom of the screen. In the popover, press the red **Delete assets** button:

Ro	om assets 👩						Contraction Distribution destination	ations
Ent	er new Asset nar	ne / descrip	otion	Market value Category O Add	asset			
S	Distribute	Detai	#	Asset 🔺	Mkt value	Category		
Ę↓	Search	+		Search	Search	Search		
~		۲	8	Black air fryer, two dials		Appliances		
		Ø	14	Countertop with light brown surface, 4 turquoise barstools		Furniture		
		Ø	15	Tall wood and metal shelving unit		Furniture		
		Ø	9	White and gray blender		Appliances		
		[	1 selec	e asset(s) to ✔ or	•			

A confirmation to delete the selected asset will appear. Press OK



# 4.7.7 How to print reports from the grid

Although FairSplit has a powerful, separate Reports page, you can also print reports based on the grid's current configuration of filters and ordering.

	Distribute	Details	#	Asset 🔺	Mkt val	Property	Room	Category
ŧ	Search	+		Search	Search	Search	Search	Search
	John's - Living	۲	21	11 - Lladro figurine, mother and	\$75	Mom's	Living	Art/collectibles
	John's - Living	۲	27	11 - Lldro figurine, lady playing	\$65	Mom's	Living	Art/collectibles
	John's - Living	۲	22	11 - Swarovski crystal rabbit, s	\$25	Mom's	Living	Art/collectibles
		۲	23	11 - Waterford glass dolphins, s	\$30	Mom's	Living	Art/collectibles
		۲	25	12 - Crystal ase - 10" tall, Wate	\$28	Mom's	Living	Miscellaneous
		۲	26	12 - Crystal stem wineglasses,	\$75	Mom's	Living	Miscellaneous
		۲	16	African standing woman statue	\$500	Mom's	Living	Keep - Art
		۲	17	Alaskan statue hippo	\$1,000	Mom's	Living	Keep - Art
		۲	1	Antique glass display cabinet w	\$450	Mom's	Family room	Furniture
		۲	18	Antique with Brass Pot-Corn hu	\$200	Mom's	Living	Art
		۲	5	Black framed oil painting - floral	\$2,700	Mom's	Family room	Art/collectibles
		۲	19	Brass Tub	\$50	Mom's	Family room	Furniture
		۲	7	Camera - GoPro	\$1,400	Mom's	Home office - study den	Electronics
		۲	8	DVD / Blu-ray player	\$630	Mom's	Living	Electronics
		a	2	Glass and dark oak rectangular	\$350	Mom's	Family room	Furniture

To print a report from a grid, click the "Report" menu and select **Print directly**:

)istribution destinations	🔳 Report 🗸
Print directly (the	grid contents)
Download Excel (all a	assets)
Download CSV (all a	ssets)

The report will show all assets:



#### Click here for tips on how to manage assets (edit, delete, details...)

Distribute	#	Asset	Mkt value	Property	Room	Category
John's - Living	21	11 - Lladro figurine, mother and child standing	\$75	Mom's House	Living	Art/collectibles
John's - Living	27	11 - Lldro figurine, lady playing harp	\$65	Mom's House	Living	Art/collectibles
John's - Living	22	11 - Swarovski crystal rabbit, small 3"	\$25	Mom's House	Living	Art/collectibles
	23	11 - Waterford glass dolphins, small 5"	\$30	Mom's House	Living	Art/collectibles
	25	12 - Crystal ase - 10" tall, Waterford s	\$28	Mom's House	Living	Miscellaneous
	26	12 - Crystal stem wineglasses, set of 12	\$75	Mom's House	Living	Miscellaneous
	16	African standing woman statue	\$500	Mom's House	Living	Keep - Art
	17	Alaskan statue hippo	\$1,000	Mom's House	Living	Keep - Art
	1	Antique glass display cabinet with stemware	\$450	Mom's House	Family room	Furniture
	18	Antique with Brass Pot-Corn husker	\$200	Mom's House	Living	Art
	5	Black framed oil painting - floral on water	\$2,700	Mom's House	Family room	Art/collectibles
	4.0					

Filter assets by room, category, or other criteria by clicking the **Search** field in the respective column:

(	Category	
	Search	
	Appliances	
P	Keep - Art	
A	Art/collectibles	
A	Clothing	
A	Electronics	
h	Accessories	
IN IN	Misc. household	
N	Miscellaneous	
k	Art	
K	Furniture	
	Vehicles	

#### The grid will display only the assets you specified:

Category

Add asset

O Click here for tips on how to manage assets (edit, delete, details...)

S.	Distribute	Details	#	Asset 🔺	Mkt val	Property	Room	Category
È↓ Ç	Search	÷		Search	Search	Search	Search	Art/collectibles×
	John's - Living	۲	21	11 - Lladro figurine, mother and	\$75	Mom's	Living	Art/collectibles ^
	John's - Living	۲	27	11 - Lldro figurine, lady playing	\$65	Mom's	Living	Art/collectibles
	John's - Living	۲	22	11 - Swarovski crystal rabbit, s	\$25	Mom's	Living	Art/collectibles
		۲	23	11 - Waterford glass dolphins, s	\$30	Mom's	Living	Art/collectibles
		۲	5	Black framed oil painting - floral	\$2,700	Mom's	Family room	Art/collectibles
		۲	6	Tiffany table lamp floral	\$1,500	Mom's	Family room	Art/collectibles

If you want to print a report only with these assets, again click on **Report**, then **Print directly**, and the report will contain the same rows as the grid:



#### Click here for tips on how to manage assets (edit, delete, details...)

Distribute	#	Asset	Mkt value	Property	Room	Category
John's - Living	21	11 - Lladro figurine, mother and child standing	\$75	Mom's House	Living	Art/collectibles
John's - Living	27	11 - Lldro figurine, lady playing harp	\$65	Mom's House	Living	Art/collectibles
John's - Living	22	11 - Swarovski crystal rabbit, small 3"	\$25	Mom's House	Living	Art/collectibles
	23	11 - Waterford glass dolphins, small 5"	\$30	Mom's House	Living	Art/collectibles
	5	Black framed oil painting - floral on water	\$2,700	Mom's House	Family room	Art/collectibles
	6	Tiffany table lamp floral	\$1,500	Mom's House	Family room	Art/collectibles

#### **Distribution stats**

Distribute	Total assets	Total mkt value
John's - Living	3	\$165
	3	\$4,230
Total	6	\$4,395

You can select multiple filters at the same time:

erty	Room		Category		
ch	Family room	×	Art/collectibles	×	
s House	Family room		Art/collectibles		-
s House	Family room		Art/collectibles		

48	Renorts
1.0	reports

4.8 Reports						
Inside an inventory	there is a Rep	orts page:				
Family Estate	Lu Overview	A Properties and assets	People	Rounds	Reports	O Need help?

Reports	I v	Vith photos	Without	photos
Family Estate Overview	List all assets and the current status of the division process as well as the current assigned owners.	Web page	Excel	CSV
Assets status by property and room	List all assets and the current status of the division process as well as the current assigned owners, ordered by property and room.	Web page	Excel	CSV
Assets status by category	List all assets and the current status of the division process as well as the current assigned owners, ordered by category. The HTML version is grouped by property and room, then ordered by category.	Web page	Excel	CSV
Assets available to divide	List assets that have not been assigned to a divisee, or to sell, or to donate, or to any other destination.	Web page	Excel	CSV
Assets to Select a destination ►	List assets assigned to the selected destination.			
Assets of All divisees ➤	List assets assigned to the selected divisee(s).	Web page	Excel	CSV
Round reports	View a specific round first; get a report from there.			

# 4.8.1 How to generate reports

Navigate to the Reports page of your inventory. Choose a report on the left:

Reports			
Family Estate Overview			
Assets status by property and room			
Assets status by category			

## Assets available to divide

Assets to	Select a destination $\checkmark$
Assets of	All divisees 🗸

## **Round reports**

A couple of reports let you filter the content in a drop down box.

One report has a filter by disposition. Select one from the **Assets to** drop down:

### Assets to

Divide 🗸
Select a destination
Divide
Donate
Кеер
Sell
Sell or donate
Stays

Another report filters by divisee. Select one from the <b>Assets of</b> drop down:
Assets of
All divisees 🗸
All divisees
Jo
Joanny
Johnny
Finally, choose a file format on the right (HTML, Excel or CSV):
With photos Without photos

Web	Even	CEV
page	EXCEL	CSV

- Web page opens a new browser tab with the report and lets you add photos at the top.
- **Excel** will download a spreadsheet. Photos will not be included, but each asset links to the asset view in FairSplit.
- CSV is a plain, unformatted spreadsheet, mainly for computer processing. No photos and no links.

## 4.8.2 How to print or send a report with photos

After generating a report from the Reports page (see previous section), you may need to:

- print it for physical distribution, or
- save and send it digitally for record keeping, collaboration, or client communication.

This is a guide for you to print or save an HTML report.

When you generate a Web report (see previous section), a new browser tab opens.

Click **Show images** at the top left and choose an image size from the drop down:



Number	Name	Market value	Category	Brand	Model	Year	Action	Divisee
56	Buffet	\$150	Furniture	None	None		Divide	Jo
57	Cabinet and contents	\$100	Furniture	None	None		Divide	
58	Credenza	\$320	Furniture	None	None		Divide	
59	Dining room set	\$100	Furniture	None	None		Divide	Joanny
	Mahogany china cabinet, glass door							

Description: Dark wood china cabinet with decorative glass door, three drawers, on legs. The AI assumes this would sell for USD 315 (should ve rify). Est. dimensions: L:18" W:42" H:75".



Loading the images might take a few seconds depending on the Internet connection. After that you can push the

Print button on the top left.

The Print dialog from your operating system appears. You can print by clicking **Print** on the bottom right:

Print	8 sheets of paper	<b></b>	
Destination	EPSON L3210 Series -		
Pages	All		
Copies	1		
Color	Color •		
More settings	~		
	Print Cancel		

Most operating systems have, in that dialog, a "Print to file" option which, instead of printing, saves a PDF file. The specifics of how this works depend on your operating system (Windows, Mac OS X, Android etc.), not on FairSplit.

Then you can find the file and send it in your email program.

# 4.8.3 How to download an Excel spreadsheet (without photos)

You can export an inventory to an Excel spreadsheet, which is compatible with other spreadsheet applications, e.g. LibreOffice.

When you click **Excel**, the spreadsheet is downloaded to your computer and a toast appears. Click the **Open** button on the toast to open the file:

S Received Files	Θ×	
Family_Estate_22_08-21-49.xlsx C:\Users\Admin\Downloads	🗗 Open	

The toast is short-lived. After it disappears, you can find the downloaded Excel file by clicking the download icon on the top right corner of your browser:



Select the Excel file. This will open a spreadsheet application on your computer. You can use your application to print the spreadsheet.

# 4.8.4 What is the difference between the 2 reports of assets available to divide?

Consider these 2 sets of assets:

- 1. Assets set to "Divide"
- 2. Assets with unset disposition (showing "---")

The "Assets to [Divide]" report shows only the first set.

The "Assets available to divide" report shows both sets. And when a division administrator is picking the assets that will go into a new division round, the list to pick from also includes both sets.

## 4.8.5 The purpose of reports in asset division

The Reports page serves several important functions, including:

- Transparency All parties can see who has been assigned what.
- Auditability Records can be downloaded and kept for legal or administrative purposes.
- Progress tracking This helps administrators monitor asset dispositions, such as which assets are still unassigned, set to divide, set to donate etc.
- Dynamic reporting Filters by destination or divisee allow tailored views.

# 5. Division

## 5.1 Division rounds

FairSplit division rounds are the procedure through which assets can be reviewed, divided, and distributed to beneficiaries or separated to sell or donate.

They are explained in the next sections:

- The Asset Review round
- The Emotional Value round
- The Selection Order round

Only the division administrator can create a round. This involves selecting a subset of the assets and the time period for divisees to bid. Before creating rounds for your division, be sure you have called FairSplit for your included <u>15-</u>minute Planning Call.

# 5.1.1 What should be listed before a division starts?

Any assets not specifically assigned in a will or agreed by all parties not to include.

For example, if all heirs have informed the executor ahead of time they have no interest in linens, cookware, or maybe big furniture items, one might list the assets in bulk, but assign them a "Sell or donate" status, so it doesn't complicate the division.

Another example: If everyone agrees Dad's rocker should go to Sue ahead of time, it should still be listed with its MV (Market Value) and assigned to Sue before dividing starts, so it counts toward her share.

It is usually a good practice to have all items listed so everything is clear to all involved parties, even if they are to be donated or sold.

# 5.1.2 What about assets removed immediately after a death?

Sometimes, for security, valuable items are removed from an estate for safekeeping. In other cases heirs or others may hastily remove things they believe they are entitled to.

All of these assets should be returned or properly listed and accounted for by the executor. Nothing should be removed from an estate without all potentially entitled parties having awareness of those items. So they should be included in the inventory, as provided for in a will or by law.

This can often be the single largest source of conflict, and reasonably so if not dealt with upfront and openly.

# 5.1.3 Get help with the administration of your division

If you have a division, you are entitled to a Planning Call – a 5-10 minute situation review for suggestions on approaches to your division process. The administrator of the division should call FairSplit for this advice. The call can

5 Division

happen before you start listing or even photographing the inventory. You can find the phone number on <u>our contact</u> page.

When an administrator is also a divisee (beneficiary), the administrator might have more information and power than the other divisees. If there is a question of fairness, or any potential conflict, it's usually better to have a FairSplit professional be the administrator of your division, in order to advise and manage the division rounds. This is an addon administrative service and you pay a flat fee whose value depends on your division plan.

# 5.1.4 Life cycle of a division round

The rounds page shows an accordion with 3 sections: Active, Pending and Closed.

**A pending round** has recently been created. Newly created assets are NOT added to a round automatically. But administrators can still edit round parameters until its start time. At this moment, the round moves into the **Active** section.

**An active round** is for divisees to interact with, until its end time. Administrators can no longer edit the round.

New assets are NOT added to an active round. This is on purpose, so last minute things can't be added after a divisee is mostly finished bidding. Alternative solutions include creating a subsequent smaller round, or just distributing some assets manually.

If all divisees finish early, the round may end earlier. If one or more divisees do not indicate they are finished, the round is extended, and the administrator is expected to talk to them to help. The administrator has the power to close the round manually even if a divisee is not finished.

When the round ends, it moves to the **Closed** section. After a few minutes, the system awards the assets. Administrators may adjust the awards or extend a round prior to the scheduled ending if a problem prevented a divisee from finishing.

# 5.2 The Asset Review (AR) round

The **Asset Review** round should be the first one in a division. It speeds up the overall process by weeding out items of no interest.

**Tip**: In a divorce, usually all items are of interest to both parties, so this round may not be needed or be used only to verify contents and values shown.

In the Asset Review round, all current divisees are automatically invited and all currently listed assets are automatically included.

In this round, divisees click **YES** for items they may have an interest in, or **NO** for items that they are fine to see sold or donated. Any asset marked **YES** by even one divisee will appear in future division rounds.

By the end of this round, you will have identified which items will be divided among participants and which can be sold or donated. Identifying unwanted items is a crucial step in clearing an estate, and for many families, these may make up the majority of assets.

The Asset Review round also gives divisees a chance to verify that the asset list is accurate and complete, and to identify any expected items that may be missing. This may include errors, such as listing a matching sofa and loveseat separately, instead of as a set. Another example is spotting an asset mistakenly valued at \$1000 instead of 100. If a Divisee finds an issue, they must contact the administrator regarding specific assets and any related concerns. Referencing assets by their number is the easiest. The administrator is responsible for resolving these issues before including the assets in future rounds.

**When closing,** AR rounds do not touch assets that are **already assigned to a divisee (these are ignored)**. But if the destination is anything other than "Sell" or "Donate", it will change to "Divide" or "Sell or donate" according to the round results. This way, it is safe for an administrator to (after creating an AR round) set an owner or the destinations "Sell" or "Donate". Anything else will be overwritten by an AR round.

# 5.2.1 How to create an Asset Review round

- Rounds cannot be created before two or more divisees accept their invitation into the division.
- Only the division administrator can create a round.

To create a round, click "Rounds" in the division menu:



The Rounds page may be empty at first:

<b>FAIR</b> SPLIT A	dmin <del>-</del> Change	e division 👻			Welcome back, David.	🖍 Account	🗗 Log out
Smith downsize		♠ Properties and assets	L People	► Rounds	Reports	Need help	)?
Division rounds @	• New division	nround					
There are currently no round	s in this division.						
	© Copyright 2011-20	DIVIDE TH 016 DiwyMaster. All rights reserved. FAQs Help Contact	U. S. Patent US 881238 Phone: +1 855-58-ES	AMILIES. 39B2. Please read our Prive TATe (855-583-7828)	acy Policy and Terms of Use.		
Click the button	• New divisio	on round					

A pop-up window will appear listing the types of rounds that can be created. With the **Asset Review** panel open, click the "Create round" button:

Change	e division - Welcome bac
Ne	w round 🙁
vi	
	Asset Review
() s	Yes/no) The AR round should be the first one in a division. It speeds the overall process by weeding out items of no interest.
T a a	The divisees click YES for items they have any interest in, or NO for items that they are fine to see sold or donated. YES from any divisee will result in the asset appearing in future division rounds.
P	At the end of this round we know which items on the list need to be divided among participants, as opposed to sold or donated to other parties.
∠ a t	When divisees feel the asset list is inaccurate or incomplete, they must email the administrator about individual assets. The administrator is responsible for resolving hese disputes before including these assets in future rounds.
	Emotional Value Bidding
	Selection Order Bidding

The AR round is unique because it automatically includes all listed assets, while other rounds require the administrator to select which assets to include.

In the final step, you must enter a Round Name, a Start time and an Ending time.

- Round name should be descriptive, as it will appear in divisees' rounds list.
- The **Start time** and **Ending time** fields define the duration of the round, specifying how long divisees have to complete bidding.

# **Create Asset Review round**

### Name and schedule

### Round name\*

e.g., Pots and Pans

### Start time\*



When the round becomes active, it cannot be edited anymore. Ending time\*



At this moment the round will end and the assets will be awarded to the participants.

### Invitation notes

[	1
Any comments written here will be sent to divisees in the round invitation email	

X Cancel

Create round

You can add an optional message in the **Invitation notes** field. This text will be included in the invitation email message, but won't appear on the round bidding page.

After completing the form, push the green **Create round** button. Divisees will then be invited via email to participate in the round.

The round stays in the "Pending" panel until its start date. While it is pending, you can still edit the round.

Active (0)						
Pending (1)	) \varTheta					
ction	Name 🔨	Туре	Divisees	Characteristics	Start	End
✓ Edit I View Delete	Desired assets	AR 😡	Joanny Jonny		7/7/2016, 1:43:00 PM	7/14/2016, 8:59:00 PM

Before the round starts, you can edit or delete the round by clicking the "Edit" and "Delete" buttons respectively.

You can also click on the "View" button to see the round information, including a grid with a list of all assets associated with this round.

## Asset Review: "Desired assets"

This round is pending, so it can still be altered by administrators. Bidding start: 7/7/2016, 1:43:00 PM Bidding end: 7/14/2016, 8:59:00 PM

Details	Asset 🔺	Mkt value	Property	Room 🔺	Category
+	Search	Search	Search	Search	Search
Ø	1840s empire chest of drawer	\$150,000	Beach house	Attic	Art and collectibles
۲	1920s reproduction wooden		Beach house	Attic	Accessories
۲	30s-40s Hollywood Regency-		Family house	Attic	Miscellaneous
۲	Antique ChairWood chair;g		Family house	Attic	Miscellaneous
۲	Antique flip-top writing desk		Family house	Attic	Miscellaneous
۲	Antique mahogany secretary		Beach house	Attic	Miscellaneous
۲	Antique marble top wooden		Family house	Attic	Miscellaneous
۲	Antique wood frame armchair		Beach house	Attic	Miscellaneous
۲	Bed-King bed;ornate woode		Family house	Attic	Miscellaneous
۲	Black TV stand with two gla		Beach house	Attic	Miscellaneous
۲	Brass and blue glass lamp		Family house	Attic	Miscellaneous
۲	Brass and porcelain lamp		Beach house	Attic	Miscellaneous
۲	Brass triple candlestick style		Family house	Attic	Miscellaneous
۲	Candleabra style brass and		Beach house	Attic	Miscellaneous
۲	Hand tools		Family house	Attic	Miscellaneous 🗸

Total assets: 410 - Total mkt value: \$150,000

< Back 🛛 🚔 Print 🛛 🕑 XLSX

# 5.2.2 How to bid on an Asset Review round

When the round moves from the Pending tab to the Active tab, divisees can bid on assets by clicking the green **Bid now** button:

Active (1)	)					
ction	Name 🔺	Туре	Divisees	Characteristics	Start	End
Bid now View 을 Close Delete	Desired assets	AR 😡	Joanny Jonny		7/7/2016, 1:43:00 PM	7/14/2016, 8:59:00 PM

Divisees click **YES** for items they are interested in and **NO** for items they are willing to have sold or donated. Selecting **YES** ensures the asset appears in future division rounds.

At the end of the round, assets will be grouped into two categories: those to be divided among participants and those to be sold or donated.

I'm Interest	Details	#	Asset	Mkt value	Property	Room 🔺	Category
	ŧ		Search	Search	Search	Search	Search
Yes No	Ø	13	1840s empire chest of drawer	\$150,000	Beach house	Attic	Art and collectibles
Yes No	۲	14	1920s reproduction wooden		Beach house	Attic	Accessories
Yes No	۲	3	30s-40s Hollywood Regency-		Family house	Attic	Miscellaneous
Yes No	۲	4	Antique ChairWood chair;g		Family house	Attic	Miscellaneous
Yes No	۲	5	Antique flip-top writing desk		Family house	Attic	Miscellaneous
Yes No	۲	6	Antique mahogany secretary		Beach house	Attic	Miscellaneous
Yes No	۲	7	Antique marble top wooden		Family house	Attic	Miscellaneous
Yes No	۲	8	Antique wood frame armchair		Beach house	Attic	Miscellaneous
Yes No	۲	9	Bed-King bed;ornate woode		Family house	Attic	Miscellaneous
Yes No	۲	10	Black TV stand with two gla		Beach house	Attic	Miscellaneous
Yes No	۲	11	Brass and blue glass lamp		Family house	Attic	Miscellaneous
Yes No	۲	12	Brass and porcelain lamp		Beach house	Attic	Miscellaneous
Yes No	۲	15	Brass triple candlestick style		Family house	Attic	Miscellaneous
Yes No	۲	16	Candleabra style brass and		Beach house	Attic	Miscellaneous
Yes No	۲	1	Hand tools		Family house	Attic	Miscellaneous -

I have reviewed all of the assets and indicated my interest. I agree with the description and market value for all of the assets I haven't flagged. I will contact Joan Smith about any assets that are missing from this list.



If you are satisfied with your bidding choices, check the I am finished checkbox. If all divisees indicate they are finished, the round will end early, speeding up the division.

Press the **Save** button to send your work to the server. From the rounds list you can come back here and edit your bid later -- but only while the round is active. Once the round closes, distribution will take place.

Click the **Save** button to submit your work to the server. You can edit your bid later, but only while the round is active.

If you are satisfied with your bidding choices, select the **"I am finished"** checkbox. If all divisees mark themselves as finished, the round will end early, speeding up the division process. Once the round closes, distribution will begin.

Depending on the inventory size, the asset list may be extensive and many items may be unwanted.

To streamline the process for divisees, two buttons are available: "Check YES on all assets..." and "Check NO on all assets...". Clicking one of these will indicate interest or lack of interest in all assets at once. Divisees can then manually adjust individual selections.

For example, if a divise is only interested in 20-30 items from a list of 300, they can click "Check NO on all sets..." and then select only the desired items. Conversely, if most items are of interest, clicking "Check YES on all assets..." allows them to deselect only the unwanted items.

Check YES on all assets	Check NO on all assets
Then click NO on any items	Then click YES on any items
you don't want.	you want.

# 5.2.3 Ending an Asset Review round



The round automatically closes at the date and time set by the administrator during set up (the "Ending time" field).

The administrator can also close a round before the "Ending time" by clicking the orange **Close** button. (This should only be done if all divisees have confirmed they are finished. Closing the round early can be useful when divisees are working quickly to complete the process).

Administrators cannot currently extend the round bidding time. To do so, contact FairSplit.

# 5.2.4 How to read an Asset Review round report

When a round closes, it moves to the "Closed" panel:



Click the blue "View" button to access the round report.

The report screen displays a list of assets from the round, along with two new columns:

- The Interested column shows which divisees expressed interest in each asset.
- The **Distribute** column contains dispositions, mainly:
  - Sell or donate, which means a decision should be made to alienate the asset, or
  - **Divide**, which means it will be available in the next division round(s).

Divisees cannot see other participants' interests, UNLESS they are also the administrator. Because of this, the administrator must be a trusted and fair participant in the process.

## Division round report: Desired assets (Asset Review)

Started: 7/7/2016, 1:53:43 PM - Ended: 7/7/2016, 2:04:00 PM

You can reassign assets manually by clicking on the "Distribute" column.

S	Interested	Distribute	Details	Asset	Mkt val	Property	Room 🔺	Category
Ę↓	Search	Search	ŧ	Search	Search	Search	Search	Search
~	Joanny	Divide	۲	Antique ChairWood chair;g		Family house	Attic	Miscellaneous 🔺
$\sim$	Jonny	Divide	۲	Bed-King bed;ornate wooc		Family house	Attic	Miscellaneous
	Jonny	Divide	۲	Coffee Table-wooden		Family house	Attic	Miscellaneous
	Joanny	Divide	۲	Lady at the Beach-Framec		Family house	Attic	Miscellaneous
		Sell or donate	۲	Miscellaneous (Bathroom)		Family house	Attic	Accessories
$\sim$		Sell or donate	۲	Overall photo		Family house	Attic	Accessories
		Sell or donate	۲	Paintings-Meadows;water		Family house	Attic	Furniture
		Sell or donate	۲	Picasso prints (group of 2)		Family house	Attic	Furniture
		Sell or donate	۲	Roster/Wind Mill Painting		Family house	Attic	Furniture
		Sell or donate	۲	Small Macthing Vases-Pai		Family house	Attic	Miscellaneous
		Sell or donate	۲	Standing Lamp-Floor lamin		Family house	Attic	Miscellaneous
		Sell or donate	۲	Television-37"		Family house	Attic	Miscellaneous
$\sim$		Sell or donate	۲	White/Gold Lamps (2)		Family house	Attic	Miscellaneous
$\sim$	Joanny	Divide	۲	Wood Framed Mirror		Family house	Attic	Miscellaneous
Tota	al assets: 410 - Selec	ted assets: 0 - Se	elected a	Hand tools 6 ssets mkt value: \$0		Family house	Attic	Miscellaneous

< Back A Print ● XLSX ● CSV

## 5.3 The Emotional Value (EV) round

The Emotional Value round ensures each divisee has the best chance of receiving the item(s) most meaningful to them in an impartial and fair way. It is particularly useful for determining ownership of items with high sentimental value rather than significant market worth. This round typically includes all items from the Asset Review round that at least one divisee expressed interest in.

In this round, each divisee receives a set number of Emotional Value (EV) credits, determined by the administrator (e.g., 500 EVs). These credits can be allocated to the items they find most sentimental or desirable. Divisees may assign all of their EVs to a single item or distribute them across multiple items in varying amounts.

For example, if given 500 EVs, a divisee could place all 500 on one item or allocate 200 to one item, 100 on another, and so on, ensuring the total does not exceed 500. To prevent excessive distribution, a maximum number of items can receive EV credits – the number is determined by the division administrator, up to 15. Typically, divisees bid on 3-7 assets in the Emotional Value round, keeping the focus on the most cherished items and avoiding situations where someone acquires too many assets by assigning just 1 credit to each.

The highest EV bid wins the asset. The item's Fair Market Value is then added to the winning divisee's account.

Occasionally two divisees put all of their points on the same desired item. The system then blindly and randomly awards the asset to one of the two divisees, much like a coin flip.

In the unlikely case of a tie on multiple items, the system awards the asset to the divisee who has received the fewest items in this round. For example, let's say there is a 3-way tie for an item between divisees A, B and C. If A has yet to win an item in the round and the other divisees, B and C, have won 1 and 2 items respectively, then the asset is awarded to A. If all three had previously won one item, the system would randomly select a winner.

If the divisees don't feel emotional attachment to any item, they don't have to use their EV points. Typically, the Emotional Value round is only done once. The intent is to distribute the highly charged assets in the first round to the person who most desired it. After the one EV round, one or more Selection Order rounds will evenly and fairly divide the remaining items. If there are hundreds of assets remaining, one may use rounds for subsets of assets (for example: highest value assets grouped, or jewelry, art, etc.)

After creating an EV round, an admin is not at liberty to assign any of its assets because someone might put all their points in one asset.

# 5.3.1 Which assets should be included in the Emotional Value round?

The Emotional Value round is best used for all assets for which even one person has shown an interest, unless the family is simply awarding items to divisees if they are the only interested party.

So all assets of interest to any divisee, as determined in the Asset Review round, should be included in the EV round. Most divisees already know their most desired 1-5 items. (Note: Items with only one party interested will eventually be awarded to the divisee through the normal flow of the Selection Order rounds if they remain the only party interested, so there is no need to award assets to divisees from the initial AR round). By including all assets, the EV round allows all divisees the chance to change their mind if they failed to list it the first time, but also lets each "winner" of the assets feel good that they truly got the ones they wanted most.

5.3.2 How to create an Emotional Value round
<ul> <li>Rounds cannot be created before two or more divisees accept their invitation into the division.</li> <li>Only the division administrator can create a round.</li> </ul>
To create a round, click "Rounds" in the division menu:
The Rounds page appears:
Division rounds 🕢 🔍 New division round
> Active (2) @
There are currently no pending rounds.
> Closed (0) @

A popover will appear containing the types of rounds that can be created. Click **Emotional Value Bidding** to open it, then click the **Create round** button:

Click the button 📀 New division round
Cþ	ange division 👻	Welcome back
	New round	8
vi		or
	> Asset Review	
/ C	✓ Emotional Value Bidding	
1	Useful as a second division round, after Asset Review. It gives each participant the best chance of receiving the items most dear to them (emotionally valuable) in an impartial and fair way. Often used to help decide who gets personal memorabilia not easily assigned	e round
	Divisees receive a number of Emotional Value credits to distribute onto a lim number of assets. The highest bid wins the asset.	ited
A	Selection Order Bidding	
L		

To create the Emotional Value round:

1) Select the divisees who will be part of the round. To do this, drag them from the "Available divisees" box into the "Participating divisees" box. After you have added all the participating divisees, click the "Next" button.

## Create emotional value round ① Select divisees to take part in this division round Who will take part in this division round? Drag divisees from the "Available divisees" box and drop into the "Participating divisees" ① Joan Smith → ① John Smith →

2) Choose which assets will be part of this round. To do this, either click the checkbox in the top left corner of the grid to select all assets, or check individual items one by one. After selecting the assets, click the "Next" button.

nterested	Details	Asset -	Mkt value	Property	Room	
Search	+	Search	Search	Search	Search	
loanny, Jonny	۲	Antique ChairWood chair;green fabric		Camarillo House	Bedroom - master	-
loanny, Jonny	۲	Bed-King bed;ornate wooden frame		Camarillo House	Bedroom - master	
loanny, Jonny	۲	Coffee Table-wooden coffee table		Camarillo House	Bedroom - master	
loanny, Jonny	۲	Lady at the Beach-Framed-Recommen		Camarillo House	Bedroom - master	
loanny, Jonny	۲	Miscellaneous (Bathroom)-Chair(1); W		Camarillo House	Bedroom - master	1
loanny, Jonny	۲	Overall photo of Master BR		Camarillo House	Bedroom - master	
loanny, Jonny	۲	Paintings-Meadows;water color white fr		Camarillo House	Bedroom - master	
loanny, Jonny	۲	Picasso prints (group of 2)		Camarillo House	Bedroom - master	L
loanny, Jonny	۲	Roster/Wind Mill Paintings (2 framed Pi		Camarillo House	Bedroom - master	
loanny, Jonny	۲	Small Macthing Vases-Painted Ceramic		Camarillo House	Bedroom - master	
loanny, Jonny	۲	Standing Lamp-Floor lamp;stained glass		Camarillo House	Bedroom - master	
loanny, Jonny	۲	Television-37"		Camarillo House	Bedroom - master	
loanny, Jonny	۲	White/Gold Lamps (2)		Camarillo House	Bedroom - master	
loanny, Jonny	۲	Wood Framed Mirror		Camarillo House	Bedroom - master	

3.1) Set the maximum number of assets each divisee can bid on during the round, from a range of 1 to 15 assets. This range helps prevent system manipulation, such as placing a single point on many items to increase the chances of winning multiple assets. Usually 3 to 10 is a good number, depending on the number of items available.

3.2) Define the number of EV credits each divisee will receive. The administrator can choose to allocate the same number of EV points to all divisees or distribute them in varying percentages. Typically, if the goal is equal distribution, all divisees receive the same number of credits.

### Create emotional value round

3 Set maximum assets and divisee credits
How many assets will each divisee be able to bid on? (Choose from 1 to 15.)
Z assets maximum

#### How many EV credits should each divisee have?

Divisee	Credits	Percentage	Allocation percentage
Joanny	500	50%	50%
Jonny	500	50%	50%

Click the "Next" button to continue.

4) In the final step, you must enter a **Round Name**, a **Start time** and an **Ending time**.

- Round name should be descriptive, as it will appear in divisees' rounds list.
- The **Start time** and **Ending time** fields define the duration of the round, specifying how long divisees have to complete bidding.

#### Create emotional value round 4 Name and schedule Round name\* Most important assets Start time\* Ending time\* ~ ~ Jul/07/2016 02 50 PM Jul/14/2016 08 59 PM When the round becomes active, it At this moment the round will end and cannot be edited anymore. the assets will be awarded to the participants. Invitation notes Any comments written here will be sent to divisees in the round invitation email.

Sack

Create round

You can add an optional message in the Invitation notes field. This text will be included in the invitation email message, but won't appear on the round bidding page.

After completing the form, push the green **Create round** button. Divisees will then be invited via email to participate in the round.

The round stays in the "Pending" panel until its start date. While it is pending, you can still edit the round.

Division rounds 🕢 💿 New division round										
Active (0)	Θ									
✓ Pending (1)										
Action	Name 🔨	Туре	Divisees	Characteristics	Start	End				
✓ Edit III View IIII Delete	Most important assets	EV 🕄	Joanny Jonny		7/7/2016, 3:24:00 PM	7/14/2016, 8:59:00 PM				
Closed (1	) 🖸									

While in "Pending", the Administrator can delete the round by clicking the "Delete" button or change the settings by clicking the "Edit" button, where a screen containing the fields "Round Name", "Start time" and "Ending time" can be modified.

It is also possible to click on the "View" button to see the round information, including a grid with a list of all assets that are part of this round.

#### Emotional Value Bidding: "Most important assets"

This round is active: divisees can bid on it. Bidding start: 7/7/2016, 2:56:34 PM Bidding end: 7/14/2016, 8:59:00 PM The divisees may bid on from 0 to a maximum of 7 assets.

Details	Asset	Mkt value	Property	Room 🔺	Category	
+	Search	Search	Search	Search	Search	
Ø	Antique ChairWood chair;green		Family house	Kitchen	Kitchen diningware	*
۲	Bed-King bed;ornate wooden fr		Family house	Kitchen	Kitchen diningware	
0	Coffee Table-wooden coffee table		Family house	Kitchen	Kitchen diningware	
۲	Lady at the Beach-Framed-Rec		Family house	Kitchen	Kitchen diningware	
۲	Miscellaneous (Bathroom)-Chai		Family house	Kitchen	Appliances	
۲	Overall photo of Master BR		Family house	Kitchen	Appliances	
۲	Paintings-Meadows;water color		Family house	Kitchen	Appliances	
۲	Picasso prints (group of 2)		Family house	Kitchen	Appliances	
۲	Roster/Wind Mill Paintings (2 fr		Family house	Kitchen	Kitchen diningware	
۲	Small Macthing Vases-Painted		Family house	Kitchen	Appliances	
۲	Standing Lamp-Floor lamp;stain		Family house	Kitchen	Appliances	
۲	Television-37"		Family house	Kitchen	Kitchen diningware	
۲	White/Gold Lamps (2)		Family house	Kitchen	Appliances	
۲	Wood Framed Mirror		Family house	Kitchen	Kitchen diningware	٦
۲	Toaster		Family house	Kitchen	Appliances	E
۲	Print		Family house	Living	Art and collectibles	Ŧ

Total assets: 93 - Total mkt value: \$150,000



## 5.3.3 How to bid on an Emotional Value round

On the scheduled date, the round goes to the "Active" panel. The divisees can now start to bid on assets by clicking the "Bid now" button.

Active (1)	9					
ction	Name 🔺	Туре	Divisees	Characteristics	Start	End
D Bid now I View Close Delete	Most important assets	EV 😧	Joanny Jonny	7 maximum assets	7/7/2016, 2:56:34 PM	7/14/2016, 8:59:00 PM

The divisees receive a number of Emotional Value credits to put on the most desired or sentimental items. They may put, or bid all EVs on a single item, or they may spread them weighted across several items up to a maximum defined by the administrator.

Bid	Details	Asset	Property	Room 🔺	Category	
	+	Search	Search	Search	Search	
	۲	Dis Antique ChairWood chair;green f	Camarillo House	Bedroom - master	Furniture	
	۲	Dis Bed-King bed;ornate wooden frame	Camarillo House	Bedroom - master	Furniture	
	۲	Dis Coffee Table-wooden coffee table	Camarillo House	Bedroom - master	Furniture	
	۲	Dis Lady at the Beach-Framed-Reco	Camarillo House	Bedroom - master	Art/collectibles	
	۲	Dis Miscellaneous (Bathroom)-Chair(	Camarillo House	Bedroom - master	Misc. household	
	۲	FocOverall photo of Master BR	Camarillo House	Bedroom - master	Art/collectibles	
	۲	FocPaintings-Meadows;water color w	Camarillo House	Bedroom - master	Art/collectibles	
	۲	FrePicasso prints (group of 2)	Camarillo House	Bedroom - master	Art/collectibles	
	۲	KitcRoster/Wind Mill Paintings (2 fra	Camarillo House	Bedroom - master	Art/collectibles	
	۲	Mic Small Macthing Vases-Painted C	Camarillo House	Bedroom - master	Art/collectibles	
	۲	Mix Standing Lamp-Floor lamp;staine	Camarillo House	Bedroom - master	Furniture	
	۲	Pot Television-37"	Camarillo House	Bedroom - master	Electronics	
	۲	RefWhite/Gold Lamps (2)	Camarillo House	Bedroom - master	Furniture	
400	-	SilvWood Framed Mirror	Camarillo House	Bedroom - master	Art/collectibles	
	۲	ToaWooden cabinet with sink - install	Camarillo House	Bedroom - master	Furniture	E
100	-	Print	Family house	Living	Art and collectibles	-

#### Bid now

I am finished



Back to rounds list

If you are satisfied with your bidding choices, check the I **am finished** checkbox. If all divisees indicate they are finished, the round will end early, speeding up the division.

Press the **Save** button to send your work to the server. From the rounds list you can come back here and edit your bid later -- but only while the round is active. Once the round closes, distribution will take place.

Press the **"Save"** button to send your work to the server. You may edit your bid later, but only while the round is active.

If you are satisfied with your bidding choices, check the "**I am finished**" checkbox. If all divisees indicate they are finished, **the round will end early**, speeding up the division. Once it closes, distribution will take place.

Round details							
Divisee	EV Credits	Percentage					
Joanny	500	50%					
Johnny	500	50%					
	Your bid	details					
Remaining EV credits: 100 Spent EV credits: 400							

At the top of the page, the participants can see round and bid details including the entitled percentage of allocation for each divisee. Note that they can also see, how many credits have been spent and how many are remaining in their own bidding. No one else; not the Administrator or other Divisees can see round information of the bidder.

## 5.3.4 How to end an Emotional Value round

The round automatically closes at the date and time established when the administrator set up the round ("Ending time").

It is also possible for the administrator to close a round before the "Ending time" by pressing the orange **Close** button. (The administrator can do so if all divisees have said that they are done. This can be helpful when all divisees are trying to rapidly get through the process).



## 5.3.5 How to read an Emotional Value round report

When the round is closed, it moves into the "Closed" panel:

Division rounds 🕢 🔍 New division round											
> Acti	ive (0) 😧										
> Pen	nding (0) 😡										
✓ Closed (2)											
Action	n N	Name 🔺	Туре	Divisees	Characteristics	Start	End				
🔳 Vie	w E lete	Desired assets	AR 😧	Joanny Jonny		7/7/2016, 1:53:43 PM	7/7/2016, 2:04:00 PM				
I Vie 前 Dei	w N	/lost important assets	EV 😧	Joanny Jonny		7/7/2016, 3:15:00 PM	7/7/2016, 3:19:00 PM				

Click the blue "View" button to see the round report.

The round report shows a grid with the assets that were part of this round – with two new columns, "Proposed" and "Distribute":

#### Division round report: Most important assets (Emotional Value Bidding)

Started: 7/7/2016, 6:24:00 PM - Ended: 7/7/2016, 6:29:00 PM

You can reassign assets manually by clicking on the "Distribute" column.

S E	Proposed	Distribute	Details	Asset	Mkt va	Property 🔺	Room	Category	
₽₽₽	Search	Search	+	Search	Search	Search	Search	Search	
	Jonny	Jonny	۲	1840s empire chest of drawer		Beach house	Attic	Accessories	-
$\sim$		Sell or donate	۲	1920s reproduction wooden		Beach house	Dining	Furniture	Ξ
$\sim$		Sell or donate	۲	30s-40s Hollywood Regency-		Beach house	Dining	Furniture	
$\sim$	Joanny	Joanny	۲	Antique ChairWood chair;g		Beach house	Attic	Furniture	
$\sim$	Jonny	Jonny	۲	Antique flip-top writing desk		Beach house	Attic	Furniture	
	Joanny	Joanny	Ø	Antique mahogany secretary	\$150,000	Beach house	Attic	Art and	
	Jonny	Jonny	۲	Antique marble top wooden		Beach house	Attic	Miscellaneous	
	Jonny	Jonny	۲	Antique wood frame armchair		Beach house	Attic	Miscellaneous	
		Divide	۲	Bed-King bed;ornate woode		Beach house	Attic	Miscellaneous	
$\sim$		Divide	۲	Black TV stand with two gla		Beach house	Attic	Miscellaneous	
~		Divide	۲	Brass and blue glass lamp		Beach house	Attic	Miscellaneous	
~		Divide	۲	Brass and porcelain lamp		Beach house	Bathroom	Appliances	
~		Divide	۲	Brass triple candlestick style		Beach house	Bathroom	Appliances	
$\sim$		Divide	۲	Candleabra style brass and		Beach house	Bathroom	Appliances	
Tota	al assets: 93 - Se	elected assets: 0	- Selected	d assets mkt value: \$0		C 0	A 11:-	8.40	Ť
						< Bac	k 📙 Print	⊕ XLSX U ⊕ CS	sv

The "Proposed" column shows the round results – which participant should receive the asset due to winning the bid. Initially the same name appears in "Proposed" and "Distribute". But, in rare cases, the administrator may decide to change the information in the "Distribute" column – change who receives an asset, or set it to "Sell or donate". This must be done with the consent of involved divisees, sometimes by their request, in order to help re-balance the fair market value to more closely match each divisee's allocation percentage, or to effect an agreed trade.

The information in the "Proposed" column cannot be changed by anyone, so a record of the round result is available forever.

#### 5.4 The Selection Order (SO) round

FairSplit uses a division method called, **Selection Order Bidding.** In it, each divisee arranges the assets in a list of descending order of preference. The system uses these lists to distribute items based on all party's rankings. At each **turn**, the system assigns to a divise the item that he/she ranked highest and is still available.

The fair market value of awarded items is tracked for each divisee. Items not selected by any party can be designated to donate or sell or the Administrator may choose to create a new Division Round for the remaining items. The Administrator may choose to do multiple rounds with different groupings. One might opt to put all art in one round, furniture in another or value ranges of items. The use of multiple rounds is particularly useful for large estates or for estates with valuable items as it can help to reduce the cash reconciliations involved when one person happens to only be awarded high or low monetarily valued items.

When closing, SO rounds do not touch assets that either are already assigned to a divisee, or have any destination other than "Divide" or empty. This makes it safe for an admin to give an asset to someone after creating an SO round, without needing to delete the round.

## 5.4.1 How to create a Selection Order round

- Rounds cannot be created before two or more divisees accept their invitation into the division.
- Only the division administrator can create a round.

To create a round, click "Rounds" in the division menu:	► Rounds	
The rounds page appears:		
Division rounds 🕢 💿 New division round		
Active (2)		
There are currently no pending rounds.		
➤ Closed (0)		
Click the button • New division round		

A popover will appear containing the types of rounds that can be created. Click the **Selection Order** panel to open it and then click the **Create round** button:

#### New round

#### Asset Review

#### Emotional Value Bidding

#### Selection Order Bidding

In an ancient, very common division method called \*Alternating Selection\*, the parties draw straws, then take turns choosing items. \*Selection Order Bidding\* yields equivalent results. In this method, first each party arranges the assets in a list in descending order of preference. Finally, the system uses these lists to distribute items based on all party's rankings. At each turn, it assigns to a party the item that they ranked highest and is still available.

The monetary value of awarded items is tracked for each party. Items not selected by any party can be designated to donate or sell or the Administrator may choose to create a new Division Round for those remaining items. The Administrator may choose to do multiple rounds with different groupings using this method for large estates or estates with valuable items to help reduce the cash reconciliations involved.

The first step to create the **Selection Order** round is to select the divisees that will be part of the round.

Drag divisees from the "Available divisees" box to the "Participating divisees" box.

The system can randomly choose who will be the first participant to be awarded by clicking the "Use random order" checkbox.

Alternatively, the Administrator can choose the order of participants. To do this, in the "Participating divisees" box, drag and drop divisees up and down. The participant at the top of the list will be the first to choose and the participant at the end of the list will go last in the rotation of awarded assets.

## Create emotional value round



Select divisees to take part in this division round

## Who will take part in this division round?

Drag divisees from the "Available divisees" box and drop into the "Participating divisees" box.

Available divisees	Drag	Participating divisees
👤 Joan Smith 🔶	_	
👤 John Smith 🔶		
	,	
Cancel Next >		

Finally, the system uses that list to distribute items based on all parties' rankings. At each turn, it assigns to a party the asset that they ranked highest and is still available.

For this, parties are put in snake ordering. For instance, if there are 3 parties, the order is 123 321 123 321... This is the recommended order, but you can change it if you want:

- Select divisee order for distribution:
- I23 321 123 321... (Recommended)
- ◎ 123 321 231 132 312 213...
- 123 231 312...
- 123 123... (Not recommended)

The second step is to choose, from a grid, which assets will be part of this round:

### Create Selection Order round



#### Select assets to be included in this round

S E	Interested	Details	Asset	Mkt value	Property	Room 🔺	Category	
Ę↓	Joanny, Jonny 🗙	ŧ	Search	Search	Search	Search	Search	
~	Joanny, Jonny	۲	Antique ChairWood chair;gm		Beach house	Bathroom	Appliances	*
	Joanny, Jonny	۲	Bed-King bed;ornate wooder		Beach house	Bathroom	Appliances	
	Joanny, Jonny	۲	Coffee Table-wooden		Family house	Bathroom -	Appliances	
~	Joanny, Jonny	۲	Lady at the Beach-Framed		Family house	Bathroom -	Accessories	
$\sim$	Joanny, Jonny	۲	Miscellaneous (Bathroom)		Family house	Bathroom -	Accessories	E
~	Joanny, Jonny	۲	Overall photo of Master BR		Family house	Bathroom -	Art and collectibles	
~	Joanny, Jonny	۲	Paintings-Meadows;water c		Family house	Bathroom -	Furniture	
~	Joanny, Jonny	۲	Picasso prints (group of 2)		Family house	Dining	Furniture	
~	Joanny, Jonny	۲	Roster/Wind Mill Paintings		Family house	Dining	Accessories	
~	Joanny, Jonny	۲	Small Macthing Vases-Paint		Family house	Kitchen	Kitchen diningware	
~	Joanny, Jonny	۲	Standing Lamp-Floor lamp;		Family house	Kitchen	Kitchen diningware	
~	Joanny, Jonny	۲	Television-37"		Family house	Kitchen	Kitchen diningware	
~	Joanny, Jonny	۲	White/Gold Lamps (2)		Family house	Kitchen	Kitchen diningware	
~	Joanny, Jonny	۲	Wood Framed Mirror		Family house	Kitchen	Kitchen diningware	-
Tota	al assets: 81 - Selected	assets: 1	0 - Selected assets mkt value: \$0		F ik - k	1211-121-1		



The next section, below, recommends a minimum and a maximum number of assets per round.

To select an asset, click it on the leftmost column. To select all assets, click the top left corner of the grid.

The administrator may decide to go ahead and put all remaining items in a single round. But the bidding UI starts getting unwieldy at 60 assets or so. Therefore, if it is more than 100-150, we would suggest creating a couple of rounds. One way to select in a round is grouping assets by value and having similarly valued items all in a round to preserve most likely proportional awarding of fair market values in the round. Another option would be to group by categories, like putting art and collectibles in one round, and furniture and appliances in another.

This sorting can be done by clicking on the top of each column, which will resort according to that field. The administrator will need to look at the division and determine what makes the most sense given the assets, their values, how many remain and the family wishes and dynamics. After selecting the assets, click the **Next** button.

In the final step, you must enter a Round Name, a Start time and an Ending time.

- Round name should be descriptive, as it will appear in divisees' rounds list.
- The **Start time** and **Ending time** fields define the duration of the round, specifying how long divisees have to complete bidding.



Any comments written here will be sent to divisees in the round invitation email.

Sack



You can add an optional message in the **Invitation notes** field. This text will be included in the invitation email message, but won't appear on the round bidding page.

After completing the form, push the green **Create round** button. Divisees will then be invited via email to participate in the round.

The round stays in the "Pending" panel until its start date. While it is pending, you can still edit the round.

ivision r	ounds 🧿 📀	New divisi	on round			
> Active (0)	0					
✓ Pending	(1) 😧					
Action	Name 🔨	Туре	Divisees	Characteristics	Start	End
✓ Edit I View Delete	Dining assets	SO 🕄	Joanny Jonny	Ordered	7/7/2016, 3:51:00 PM	7/14/2016, 8:59:00 PM
> Closed (2	) \varTheta					

While in "Pending", the Administrator can delete the round by clicking the **Delete** button or change the settings by clicking the **Edit** button. The fields "Round Name", "Start time" and "Ending time" can be modified.

It is also possible to click on the "View" button to see the round information, including a grid with a list of all assets that are part of this round:

#### Selection Order Bidding: "Dining assets"

This round is active: divisees can bid on it. Bidding start: 7/7/2016, 2:56:34 PM Bidding end: 7/14/2016, 8:59:00 PM

Details	#	Asset	Property	Room 🔺	Category	
ŧ		Search	Search	Search	Search	
۲	1	Antique ChairWood chair;green fabric	Camarillo House	Bedroom - master	Furniture	-
۲	2	Bed-King bed;ornate wooden frame	Camarillo House	Bedroom - master	Furniture	
۲	3	Coffee Table-wooden coffee table	Camarillo House	Bedroom - master	Furniture	
۲	4	Lady at the Beach-Framed-Recommen	Camarillo House	Bedroom - master	Art/collectibles	
۲	5	Miscellaneous (Bathroom)-Chair(1); W	Camarillo House	Bedroom - master	Misc. household	
۲	6	Overall photo of Master BR	Camarillo House	Bedroom - master	Art/collectibles	
۲	7	Paintings-Meadows;water color white fr	Camarillo House	Bedroom - master	Art/collectibles	
۲	8	Picasso prints (group of 2)	Camarillo House	Bedroom - master	Art/collectibles	
۲	9	Roster/Wind Mill Paintings (2 framed Pi	Camarillo House	Bedroom - master	Art/collectibles	
۲	10	Small Macthing Vases-Painted Ceramic	Camarillo House	Bedroom - master	Art/collectibles	
۲	11	Standing Lamp-Floor lamp;stained glass	Camarillo House	Bedroom - master	Furniture	
۲	12	Television-37"	Camarillo House	Bedroom - master	Electronics	
۲	13	White/Gold Lamps (2)	Camarillo House	Bedroom - master	Furniture	
۲	15	Wood Framed Mirror	Camarillo House	Bedroom - master	Art/collectibles	
۲	14	Wooden cabinet with sink - installed st	Camarillo House	Bedroom - master	Furniture	
-	40	40.40- energine alterated descent	O	1 incidentes	Europitume O Europieleie	

Total assets:10- Total mkt value: \$9,745

**~ ~** 

< Back 🚔 Print 🕑 XLSX 🕑 CSV

# 5.4.2 How many assets should go into a Selection Order (SO) round?

For a fair and manageable division process, aim for at least 5 selection cycles per round. A **cycle** means each participant gets one turn to choose an item. For example, with 5 divisees, a round with 25 items allows for 5 full cycles.

But if there are more than 50 assets, consider breaking them into multiple rounds to avoid overwhelming participants. With over 50 assets or so, bidding starts becoming difficult.

For very large sets (e.g., 600 items), the administrator may create several rounds, e.g., 4 rounds of 150 items each, running at the same time.

## 5.4.3 How to bid on a Selection Order round

On the scheduled date, the round goes to the "Active" panel, and then divisees can click the green "Bid now" button.

Division rounds ② • New division round									
✓ Active (1) €	9								
Action	Name 🔨	Туре	Divisees	Characteristics	Start	End			
Bid now     Eview     Delete	Dining assets	SO 🕄	Joanny Jonny	Ordered	7/7/2016, 3:44:00 PM	7/14/2016, 8:59:00 PM			
> Pending (0) •									
Closed (2) Image: Closed (2									

As a divisee, you leave items you do not want in the left column ("Unwanted assets") and drag the assets you want to the right column ("Selected assets").

In the right column, you also need to **rank the assets by placing the most important ones at the top and the least important at the bottom**. Numbers will appear showing the position of each asset in rank.

Unwanted asset	S market value: \$1802	Selected assets to arrange 25 assets Fair market value: \$52		
Wooden box, inlaid with quartz #	508 \$142	[1] Stockpot - 18 qt - stainless #	1158 \$250	
in Green home / Family	<b>@</b>	in Green home / Kitchen	<b>@</b>	
Paint - quarts #783	\$157	[2] Quicken 2001software #395	\$84	
in Green home / Garage	<b>@</b>	in Green home / Den	<b>@</b>	
Croquet set #819	\$60	[3] Baby quilts #146	\$195	
in Green home / Garage	<b>@</b>	in Green home / Bdrm 2	<b>@</b>	
Framing square #924	\$16	[4] BBQ cover #1568	\$59	
in Green home / Garage	<b>@</b>	in Green home / Patio	<b>@</b>	
Table square #958	\$14	[5] Cookware - 2 qt pan- Revere	\$22	
in Green home / Garage	<b>O</b>	extra #1059		
Measuring cup small liquid #1113	\$22	fc1 Cookwara - E at circulae pae	#1050 \$66	

am	finis	shec
🔁 То г	ounds	list

Report

. . .

When you are satisfied with your bid, check *I am finished*. If all divisees indicate they are finished, the round will end early, speeding up the division.

While the round is active, you can come back here and **edit your bid later**, even if you had indicated you were finished. Once the round closes, distribution will take place.

### How to save the SO round bid

The Selection Order round is the only one without a **Save** button. It automatically sends your bid to the FairSplit server after each move you make.

Never open the same SO round bidding page on two browser tabs – each of these will not know about the selections made in the other, and the last one to save will "win", erasing the data from the other tab.

### How to bid with the computer keyboard

It is also possible to select and rank the assets using the keyboard:



The asset selected to be moved using the keyboard will change color: Unwanted assets Total assets: 10 Total mkt value: \$9,745 Family nouse / Kitchen . Crystal 13 \$225 Family house / Kitchen ۲ Crystal 14 \$550 Family house / Kitchen ۲ \$750 Mirror - wall Family house / Bathroom - master ۲ Crystal \$175 Family house / Kitchen ۲ Ξ \$4,500 Sculpture Family house / Bathroom - master o Wall shelves \$475 Family house / Bathroom - master ۲

### How to finish a bid on an SO round

When you are satisfied with your bidding choices, check the **I am finished** checkbox. If all divisees indicate they are finished, **the round will end early**, speeding up the division. Once the round closes, distribution will take place.

When done, you can click the **Report** button to see or print a receipt of your bid. This report is only available during bidding. The data displayed comes anew from the FairSplit server, so you can be sure that's what was saved. Again, the order of the assets is important, with the most desired at the top.

```
160 PX IMAGES
```

240 PX IMAGES

## **Report: Joe** (Type an optional text here)

3/23/2025

		Assets							
Number	Name	Mkt value	Category	Brand	Model	Үеаг	Location		
1158	Stockpot - 18 qt - stainless	\$ 250	Housewares	Thonet	Nexus 6	-	11		
395	Quicken 2001software	<b>\$</b> 84	Software	None	R2730DB	2015	6		
146	Baby quilts	\$ 195	Linen	ACME	Nexus 6	-	4		
1568	BBQ cover	\$ <b>5</b> 9	Tools	None	Nexus 6	1810	17		
1059	Cookware - 2 qt pan- Revere extra	\$ 22	Housewares	Lada	R2730DB	2015	11		
1060	Cookware - 5 qt circulon pan	\$ 66	Housewares	Ginsu	R2730DB	2015	11		
1573	BBQ tools - sets	\$ <b>5</b> 1	Tools	Lada	None	-	17		
680	Beer making equipment, bottles, capper	\$ 175	Crafts	None	None	-	9		
Descriptic philosoph	on: Lorem ipsum dolor sit amet, delenit labores ea pro. Ei u ia, quot magna corpora vis at.	usu possit dictas	s. Nec audire volu	uptatibus ne. Ci	u vis brute clita vulputa	ate, ne vim	scaevola		
818	Catchers equipment, pads, knee, mask, squatting pads	\$ 237	Sports	Tabajara	None	1810	9		
843	Hockey equipment pants, pads, helmet, gloves, shirts	\$ 200	Sports	Ginsu	Nexus 6	-	9		
980	Crockpot - automatic 5 qt	\$ 42	Appliance	None	None	-	11		
1111	Measuring cup large liquid	\$ 36	Housewares	None	None	-	11		
1249	Duvet - queen	\$ 288	Linen	None	None	2015	13		
Descriptic philosoph	Description: Lorem ipsum dolor sit amet, delenit labores ea pro. Ei usu possit dictas. Nec audire voluptatibus ne. Cu vis brute clita vulputate, ne vim scaevola philosophia, quot magna corpora vis at.								
354	Plaques honorary certificates	\$ 250	Documents	None	P2730DB	2015	6		

It is possible for you to change your bid after viewing or printing the receipt, therefore it does not constitute proof. It's just intended for your own control.

## 5.4.4 How to end a Selection Order round

The round automatically closes at the date and time established when the administrator set up the round ("Ending time").

It is also possible for the administrator to close a round before the "Ending time" by pressing the orange Close button. (The administrator can do so if all divisees have said that they are done. This can be helpful when all divisees are trying to rapidly get through the process).



## 5.4.5 How to read a Selection Order round report

When the round is closed, it moves into the "Closed" panel:

Division rounds 🕢 💿 New division round											
> Active (0) •	> Active (0) •										
> Pending (0)											
← Closed (3)	✓ Closed (3)										
Action	Name 🔺	Туре	Divisees	Characteristics	Start	End					
View  Delete	Desired assets	AR 😧	Joanny Jonny		7/7/2016, 1:53:43 PM	7/7/2016, 2:04:00 PM					
I View 前 Delete	Dining assets	SO 🤪	Joanny Jonny	Ordered	7/7/2016, 4:01:00 PM	7/7/2016, 4:02:00 PM					
Tiew	Most important assets	EV 😡	Joanny Jonny	7 maximum assets	7/7/2016, 3:24:00 PM	7/7/2016, 3:29:00 PM					

Click the blue "View" button to see the round report.

The round report shows a grid with the assets that were part of this round – with two new columns, "Proposed" and "Distribute":

#### Division round report: Dining assets (Selection Order Bidding)

Started: 7/7/2016, 7:06:07 PM - Ended: 7/7/2016, 7:10:00 PM

You can reassign assets manually by clicking on the "Distribute" column.

S	Proposed	Distribute	Details	Asset	Mkt value	Property	Room 🔺	Category	
Ę₩	Search	Search	+	Search	Search	Search	Search	Search	
~	Jonny	Jonny	۲	Antique ChairWood chair;green fabri	\$4,500	Family house	Bathroom - master	Art and collectibles	*
$\sim$	Jonny	Jonny	۲	Bed-King bed;ornate wooden frame	\$475	Family house	Bathroom - master	Furniture	
$\sim$	Joanny	Joanny	۲	Coffee Table-wooden coffee table	\$750	Family house	Bathroom - master	Accessories	
$\sim$	Jonny	Jonny	۲	Lady at the Beach-Framed-Recomme	\$95	Family house	Dining	Accessories	
$\sim$	Joanny	Joanny	۲	Miscellaneous (Bathroom)-Chair(1);	\$2,225	Family house	Dining	Furniture	
$\sim$	Joanny	Joanny	۲	Overall photo of Master BR	\$175	Family house	Kitchen	Kitchen diningware	
$\sim$	Joanny	Joanny	۲	Paintings-Meadows;water color white	\$400	Family house	Kitchen	Kitchen diningware	
$\sim$	Joanny	Joanny	۲	Picasso prints (group of 2)	\$350	Family house	Kitchen	Kitchen diningware	
$\sim$	Joanny	Joanny	۲	Roster/Wind Mill Paintings (2 framed	\$225	Family house	Kitchen	Kitchen diningware	
$\sim$	Jonny	Jonny	۲	Small Macthing Vases-Painted Ceramic	\$550	Family house	Kitchen	Kitchen diningware	
Tota	Total assets: 10 - Selected assets mkt value: \$0								
							< Back 🚔 P	rint 🕑 XLSX	⊕ CSV

The "Proposed" column shows the round results – which participant should receive the asset due to winning the bid. Initially the same name appears in "Proposed" and "Distribute". But, in rare cases, the administrator may decide to change the information in the "Distribute" column – change who receives an asset, or set it to "Sell or donate". This must be done with the consent of involved divisees, sometimes by their request, in order to help re-balance the fair market value to more closely match each divisee's allocation percentage, or to effect an agreed trade.

The information in the "Proposed" column cannot be changed by anyone, so a record of the round result is available forever.

## 5.4.6 Working with the results

After Selection Order rounds have divided all items of interest between the heirs, it is up to the Administrator to review the distribution of fair market values and determine how the family will deal with disparity. Typically the executor of an estate would be advising or a discussion would be had by the administrator with the family members, and possibly the family attorney.

Some families care little about the fair market values and simply put \$1 on each item and don't worry about reconciling to make even across the percentages one is entitled to by law or agreement. In significant value estates, and in divorces many states and some tax law may require a reasonable fair market value to be determined for each party. FairSplit is a tool to be used to help the family document personal property and achieve fair divisions. To comply with the laws of each state or federal tax laws, we recommend seeking professional guidance.

Many different reports exist to be used for creating lists of what to sell, donate, ship, and which divisees received which items and the values of those, etc.

## 6. Meta

#### 6.1 How to upgrade your plan

If you have an inventory, you can upgrade it to a division. Also, within one of these categories, you can upgrade your plan. The procedure is the same.

Plans and upgrades are applied to individual divisions, not to your whole account. This way you can have different plans for different divisions.

Because in FairSplit a user can have multiple inventories, you have to be careful to upgrade your existing inventory, instead of buying a new one.

First get informed about our plans; take a look at our Pricing sections, but don't proceed from there:

- Inventory plans
- Division plans

DO NOT click "Add to cart" yet. That button buys you a new inventory or division.

To start a plan upgrade for your existing inventory or division:

Go to the FairSplit web app, at app.fairsplit.com.

Log in. Go to the Divisions page, which lists your inventories. Find the one you wish to upgrade. **Click its plan name**, from the "Plan" column:

	#						<b>A</b>	Notifications
Туре	2	Name	Local Agent	Created	Plan	Valid until	Actions	
Inventory	366	Test Inventory	None	2025-02-15	Inventory only	2027-02-17	भू Upgrade	I
Inventory	365	LA's Inventory	Redirect test	2025-01-28	Long term	2031-01-29	🛛 🗶 Upgrade	
Downsizing	364	Raphael's Downsizing	DivvyMaster Lawfirm	2025-01-20	Basic	2027-01-22	😭 Upgrade	I
Estate	363	Raphael's Estate	KW Test 1	2025-01-20	Basic	2027-01-22	😭 Upgrade	
Estate	362	Szara's Inventory	None	2025-01-12	Basic	2027-01-14	e ? sı	ipport

A popover opens, detailing the current plan for that inventory:

	#				A Notifications
Туре	7	Plan details of "Test Inventory" (#366)	8	il	Actions
Inventory	366	Inventory: Test Inventory		17	ोष्ट्र Upgrade
Inventory	365	You have the <b>Inventory only</b> plan which offers: • 2500 assets.		29	ोष्ट्र Upgrade
Downsizing	364	<ul><li>1 properties.</li><li>1 GB storage.</li></ul>		22	ोष्ट्र Upgrade
Estate	363	Plan valid from 2/15/2025, 5:17:00 PM to 2/17/2027, 5:17:00 PM		22	भ्न Upgrade
Estate	362			14	② Support
lick 🖭 U	ograd	e and follow the instructions on screen. The rest should be stra	aightforw	ard:	pick the plan you

and follow the instructions on screen. The rest should be straightforward: pick the plan you 🏋 Upgrade

elected and go through payment.

In the end you'll receive email messages about your purchase. To see the new plan on the Divisions page, reload the page. On desktops, that's CTRL-R.

#### 6.2 Leaving a review or comment

We would love to hear about your experience with FairSplit. You can leave a review on the following platforms:

- FairSplit website
- Google Business

Also, follow us on social media to keep up with FairSplit updates and tips:

LinkedIn
Facebook
YouTube

Your feedback helps us improve and continue to serve our clients with the best possible experience. Thank you for your support!

#### 6.3 Co-branded inventories

If your business could benefit from partnering with FairSplit, learn more about our co-branded accounts:

You can create <u>a co-branding account with FairSplit</u> so your customers will have their inventories in FairSplit with your logo on it, and even some text personalized to you.

The Co-Branded Partners annual license lets you create as many separate and private inventory accounts as wanted, with no extra charges.

## 6.3.1 Who creates the co-branded inventories?

Either your business, or your customers.

If you have in your website a logged area for your customers, you can link to your customized landing page on FairSplit, for your customers to self-serve and create their inventory. But the link must not be divulged at large.

Otherwise, you can always create the inventories in FairSplit yourself, and invite your customers.

## 6.3.2 How to create co-branded inventories

Once you have created your Local Agent account, you can start creating sponsored inventories for your clients. These inventories will show your logo and co-branding text. Here's how:

1. Go to 2. Click t	app.fairsplit.com ar he <b>Create an Inve</b>	d log in. <b>ntory</b> button at the bottom o	of the Divisions page:		
F	<mark>S</mark> Dashboard — FairSplit	× +			×
	→ C ଲ 🖙 app.fair:	plit.com/#!/	ž	x 🔍 💀 🚳 G	) 💼 🗅 I 🌒 🗄
	🂩 FairSplit™	★ Your account - 💄 Welcor	ne, Local Agent! <del>-</del>		A Notifications
	Dashboard You currently have no in	rentories or divisions to work in.		Press Enter to search	n ×
	# <b>`</b>	Local Agents			
	27	Dividing Things Law Firm			
	Create an inventory				
	© Copyright 2	DIVIDE THING 011-2024 DivvyMaster. All rights reserved. U. S. P Usage FAQ Help Contact Ph Learn how to use Fa	S, NOT FAMILIES ® atent US 881238982. Please read our F one: +1 855-58-ESTATe (855-583-7828) arSplit with our User Guide.	Privacy Policy and Terms of Use	⑦ Support
3. Fill in t	the inventory name S Dashboard — FairSplit	and in the "Create for" field	d select your company	name.	×
+ -	- · · · · · · · · · · · · · · · · · · ·	plit.com/#!/add-inventory	ž	t 🔍 🖻 🙆 🖸	) 🖻 🗅   🏟 🗄
	<b>€</b> FairSplit <sup>™</sup>	★ Your account <del>-</del> 🛛 💄 Welcom	e, Local Agent! <del>-</del>		A Notifications
	Create a Share	able Online Inventory	,		
	Sponsored Inventory				
	Name this inventory; e. g.	"Joe's Inventory".			
	Create for Dividing Th	ngs Law Firm 🗸			
	• Create an inventory				
	An inventory contains pro If you are trying to sepa inventory and create prop	perties, rooms, assets, photos and a se r <b>ate assets by location,</b> it is a mistake erties and rooms inside it.	et of people that can see these e to create multiple inventories	e. for this purpose; rather	; use a single
	© Copyright 20	DIVIDE THINGS 11-2024 DivvyMaster. All rights reserved. U. S. Pa Usage FAQ Help Contact Pho Learn how to use Fair	, NOT FAMILIES ® tent US 8812389B2. Please read our Pr ne: +1 855-58-ESTATe (855-583-7828) 'Split with our User Guide.	ivacy Policy and Terms of Use.	() Support

4. Your client's inventory account has been created. Note that the inventory shows your logo and other cobranding text. Now you can add participants to the inventory, from the People heading. Usually you invite the



## 6.3.3 How to view your co-branded inventories

As a Local Agent, you can also view a list of your co-branded inventories.

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1. Go to app.fa 2. In the top m	<mark>irsplit.co</mark> r enu click	n and lo on "We	og in. lcome, " and the	n on "Local Agents":					
- FS Dashb	<ul> <li>FS Dashboard — FairSplit × +</li> </ul>							_	
$\leftarrow$ $\rightarrow$ G	a 🖘 م	op.fairsplit.c	com/#!/		Q,	* 🔍 🖻 🛛	5 🔁 🕘 🔮	រិ 🛛 🌒 🗄	
	🕭 Fair	.Split™	¥ Your account •	💄 Welcome, Local Agent! •			Ľ	Notifications <	
	Dashbo Your divisions	ard		II Local agents I Log out		Press Enter to sear	ch ×		
	Туре	# 💊	Name	Local Agent	Created	Plan	Valid until		
	Inventory	8612	Sponsored Inventory	Dividing Things Law Firm	2024-10-31	Inventory only	2026-11-02		
	Local Agents								
	# 🖌		Local Agents						
27 Dividing Thin			Dividing Things Law	Firm					
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3. The list of your Local Agents is presented. Choose one, then click its **Details** button.

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	◆ FAIRSPLIT <sup>™</sup>							
	Local agent list							
	• Add local agent							
	# Name	Managers	Created	Logo	Status Ad	tions		
	27 Dividing Things Law Firm	Tester: david@divvymaster.com Local Agent: jaguarnet7+la@gmail.com	04/29/2024	<b>DIVIDING</b> THINGS Law Firm	Approved C D	dit		

