

Aurora Quick Reference Guide

This reference card gives you brief descriptions of Aurora features you'll use over and over again. If your question isn't answered here, please check the QuickStart guide you received in your Aurora package or refer to the full user manual found in the Help menu of Aurora.

REPORT MANAGEMENT

Link WinTOTAL to your XSite for synchronizing contacts and orders

- From the Appraisal Desktop, choose **Options, Office Settings**.
- Click **Edit my XSite information**.
- Enter your XSite username and password, click **OK**.

Create a nested folder

- Right-click any existing folder and choose **New**.
- Type a name for the new folder and click **OK**.

Copy and move files

- Click any single file, or hold the **CTRL** key and click multiple files.
- Click **Move/Copy** in the toolbar.
- Click **Copy**, then select the destination folder and click **OK**.

Update the Report Status lights

- Click any single file, or hold the **CTRL** key and click multiple files.
- Right-click and choose **Status**, then select the desired status condition.

Merging from another report

- From the **Order** or **Form PowerView**, click **Merge** in the toolbar.
- Locate the source report by browsing folders or using "Find".
- Click **Select form in report**, then double-click the sections of the report you do NOT wish to merge from (turn off the merge icon).
- Click one of the merge options at the top of the dialog (Merge forms and data, Merge forms only or Clone).

FORMFILLING

Add forms to your report

- From the **Order** or **Form PowerView**, click **Contents** in the toolbar.
- Drag a form from the list on the left to your report on the right.

Swap major forms

- From the **Order** or **Forms PowerView**, click **Contents** in the toolbar.
- In the list on the left, double-click any Major form (denoted by an M).
- When prompted, click **Yes** to replace the existing major form.
- Relevant data is copied to the new form, while the old form is placed in the Workfile for future reference.

Include my license with an appraisal report

- From the **Forms PowerView**, click the drop-down arrow for **Add**.
- Select the source for your license document. If the form is already in an electronic format, select **File** or **PDF**.
- Choose a form type, and type a title in the text box.
- Click **Browse** to select your license file, and then click **OK**.
- To scan a hard copy of your license, choose **Document from Scanner**.

Create a QuickLists item:

- Type the comment in the form.
- Press **ALT+0**.
- Change the keyname for the comment and click **OK**.

Create a virtual Sticky Note (QuickNotes)

- Click the desired color of **QuickNotes** from the tool bar

- Click any place in your document where you'd like to place the note.
- Type your message, then click the X in the upper-right corner.

Change the default font for your reports

- Choose **Forms, Default data fonts, Set default form data font**.
- Select the desired font from the dialog box and click **OK**.

Reformat a field to show more text

- Select the text in a field, or select multiple fields.
- Right-click any field and choose **Fonts**.
- Select a smaller font size from the **Size** list and click **OK**.

Change the case of text to or from all caps

- Choose **Tools, Change Case**, then select what you'd like to change (the current field, selected fields, the current form or the entire report).
- From the list, click the radio button for your preferred format (sentence, lowercase, uppercase or title case) and click **OK**.

COMPARABLES

Use the Square Foot Adjuster

- Click **Tools, Square Foot Adjuster**.
- Enter the appropriate Adjustment Factor, (fixed, individual or a percentage adjustment), then select the desired criteria and click **OK**.

Use the Auto Adjuster

- Open the **Comps PowerView** and click **Side-by-side comps**
- If desired, click **Detailed View**, then click **Auto Adjuster**.
- For numeric fields, enter an adjustment amount in the first column, and

a threshold figure in the right.

- For text fields, click the Adjustment Table button (...) and complete the fields in the dialog box. Click **OK**.

Import comps into the database

- Open the **Comps PowerView** and click **Comps database**.
- Click **Import** in the toolbar, then select the source for your comps (old reports or external source).
- Click **Next** and follow the directions of the Comp Import Wizard.

Find comps based on distance from the subject

- From the Comps database, enter a distance in the **Proximity Within** field in the **Search PowerPane** and click **Find Now**.

SKETCHING

Retrieve more information from sketches into forms

- Click the **Sketch PowerView** button.
- In the Sketch Areas PowerPane, click the check box for the living area calculations you'd like brought in from your sketch.

Import an old sketch

- Click the **Sketch PowerView** button and then click **Import Sketch**.
- Use the search tools in the dialog box to locate the source report.
- Select the desired sketch, and click **Import**.

LOCATION MAPPING

Download a location map

- From the **Forms** or **Comps PowerView**, choose **Tools, net.X Wizard, Location map only** (or one of the other options).
- Confirm placement of your subject and comp balloons and click **Finish**.

Move the subject or comps balloon

- While in the net.X Wizard, with a map displayed, click any balloon.
- To move the text, click and drag the balloon
- To move the point, click the grey box and the point and drag it. (Distances are automatically recalculated.)

Get driving directions to subjects and comps

- While in the net.X Wizard, with a map displayed, click the **Driving** tab in the **Location Map Options** PowerPane.
- Click the check box to **Start directions from my office** (otherwise directions are calculated from the subject property).
- Click **Get Directions**, then **Print Directions**.

IMAGES

Pull images from your digital camera

- Open the **Images PowerView**, then click **Get Photos** in the toolbar.
- Click **Yes** to use previous settings, or click **No** and follow the **Digital Photo Wizard** to tell WinTOTAL where to retrieve your photos from (a camera, storage card or directory).
- When prompted, enter a name for a new Photo Album and then indicate whether you'd like the images deleted from the source location.

Reduce the size of an image file

- Double-click any image in WinTOTAL.
- In the **Image Optimizer**, select the appropriate settings in the **Optimize** tab. For most appraisals, click **Medium Photo**, for the **Size** option and **Medium** for the **Image Detail**.
- Click **OK**.

TRACKING

Update the status on a report

- Select any order in the **Tracking PowerView**.
- Click **Set Status** in the Order Status PowerPane.
- Select the appropriate status, then add any notes or comments.
- Click **Save**.

Enter a new contact or company

- From the **Contacts PowerView** toolbar, click **Add**.
- Select **Company** or **An individual**, and the **Type of contact**.
- If an individual, click **Assign to a company** and select the company.
- Complete the remaining items, and click **OK**. Note that contacts marked

as "Public" will be available to all users on your system.

DELIVERING APPRAISALS

E-mail a PDF copy of your report

- Click **Deliver Report**, then **PDF using Outlook or regular e-mail**.
- Use the drop-down menus to insert relevant information directly from your report. Click **To**: to select a different e-mail address from your Contacts database.
- Set any other options, then click **Finish**.
- From the Aurora Print Engine dialog, select the forms you'd like to include in your report, or click **Mark All** to include the entire report. Click **OK**.
- Confirm the message in your e-mail program, and click **Send**.

Send files to other appraisers

- From WinTOTAL, choose **Deliver Report**, then **WinTOTAL report using Outlook or regular e-mail**.
- Complete the **Report Delivery** dialog box, using the drop-down menus to select relevant information directly from your report. Click **To**: to select a different e-mail address from your Contacts database.
- Set any other options, then click **Finish**.
- Confirm the message in your e-mail program, and click **Send**.

BILLING

Generate an invoice for an order

- Login to your Appraiser XSite and select **Business Management**.
- Click **Orders** in the **Navigation** pane, then find and double-click the desired report.
- In the toolbar, click **Billing, Invoice**.
- Fill out your invoice, then click **Send** to e-mail it directly to your client.

Enter a payment

- Login to your Appraiser XSite and select **Business Management**.
- Click the **Invoices** link, then double-click the desired invoice.
- Enter the payment information in the **Payments** section of the Invoice and click **Save**, then **Close**.