QUICK START · HOW-TO 06

Start a report: your paperwork in

How do I start a report and drop in what I have?

1. **New**
   Tap New. What you have holds six spots: the engagement letter or order, subject property documents, the purchase contract, your comp sheet, your photos and the sketch. None of them is required.

2. **The letter**
   Drop the PDF, or a photo of it, on its spot. It starts reading right away and usually takes 2 to 5 minutes, so start another spot while it reads.

3. **Subject property documents**
   The MLS listing or county tax record, as a CSV, a PDF or a photo. It fills about a dozen subject facts, each marked from the listing sheet.

4. **The address**
   Each paper offers the address it read. Fix it in the box if it needs it, then tap Use this address. Typing it instead? If you already have a report for that house, tap Open it, or Start a new report.

5. **The contract**
   Drop up to five files, counter offers and addenda too, then tap Analyze Contract. Not a purchase? Tap Skip it.

6. **Where it lands**
   Engagement Letter: the order at a glance, and what the client asked for, to check off. Assignment Information: assignment type, agency loan, file numbers. The listing: Subject Property, Site, Dwelling Exterior, Unit Interior and Subject Listing Information. The contract: Sales Contract.

7. **Ink and teal**
   Ink with a note, like from the listing sheet, is your own paperwork. Teal is a draft: tap Keep, or change it, and the teal falls away. The listing's square footage is the agent's number. Your measurement decides.

> **THE ONE THING THAT TRIPS PEOPLE UP**
> The address never fills itself: nothing is written until you tap Use this address. Typed the address before the letter, or dropped a new letter over one you have? The letter waits for you. Tap Analyze Requirements on its spot.

> **ALWAYS YOURS**
> Arm's length, personal property, whether the concessions are typical, and your analysis of the listing history. The contract shows the evidence; nothing there is filled in for you. The seller goes in the report; the buyer stays in your workfile.

Source: Appendix A-1 URAR Delivery Specification v1.4: 0600.0016 (20.000 Is there a sales contract?, Required): "When true, indicates that an active sales contract is associated with the property." 0900.0004 (19.000, Required): listed within the previous twelve (12) months; 0900.0020 (19.011 Analysis of Subject Property Listing History) is required when it is true. 0100.0033 (3.008 Special Tax Assessments, Required). 0100.0019 (3.006 Accessory Dwelling Units, Required): "Deliver as zero if there are no accessory dwelling units on the property."