



# Report Tips & Tricks

ACI has created this list of the top Report Tips and Tricks to help you make the most of your ACI Collection and increase productivity.

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# Report Tips and Tricks

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## Tip #1 Linked Common Responses

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Linked Common Responses are identified by a chain link symbol displayed to the left of the description in the Common Response drop-down list, and are used to create commonly used entries for related fields. City, County, State and ZIP Code are an example of related fields. Linked Common Responses can be created for a range of fields (consecutive fields) or select fields.

### Creating Linked Common Responses for a Range of Fields

1. Enter text in all fields in the range.
2. Click in the first field in the range. Press **Ctrl+Shift** on the keyboard and click in the last field in the range (all fields in the range are highlighted).
3. Press **F6** on the keyboard.
4. Click **Save** and click **Close** to exit.

### Creating Linked Common Responses for Select Fields

1. Enter text in select fields.
2. Click in the first field of the Common Response. Press **Ctrl** on the keyboard and click in each field to include in the Common Response (select fields are highlighted).
3. Press **F6** on the keyboard.
4. Click **Save** and click **Close** to exit.

**NOTE:** A Linked Common Response is only accessible from the first defined field in the range.

## Tip #2 Custom Report Paks

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Report Paks make reporting easier by combining a collection of forms commonly used together under a single name in the Report program. Create custom Report Paks for specific reporting requirements. Create a Report Pak from scratch, or clone an existing Pak as the basis for the custom Pak.

### Creating Report Paks

1. Click **Tools > Report Pak Utilities** and click **Create**.
2. The *Pak Creator* opens. Highlight a form in the *Reports Pool*. Double-click to add the form to the current report. Use the **arrow icons** to add, remove, and reorder forms in the current report.
3. Select a *Primary Form* for the *Report Pak* and click **Build**.

**NOTE:** By default, the first available principal form in the Pak e.g., the 1004 Single Family 2005, is set as the *Primary Form*. Click the drop-down arrow to change the *Primary Form*.

4. Enter the *Report Pak Name* and click **OK** to save. Click **Done** to exit the *Pak Creator*.

### Cloning Report Paks

1. Click **Tools > Report Pak Utilities** and click **Clone**.
2. Select the *Report Pak* to clone and click **OK**.
3. Edit *Report Pak* contents. Use the **arrow icons** to add, remove, and reorder forms in the current report, and click **Build**.
4. Enter the new *Report Pak Name*. Click **OK** to save and click **Done** to exit the *Pak Creator*.

## Tip #3 Open Multiple Report Pages in a Report

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View multiple report pages in a report, like comparables and thumbnails, at the same time. Press the **Ctrl** key on the keyboard while clicking on a report component icon in the Component List. The selected component opens in a new window. To resize windows, click and drag on a window's blue title bar.

## Tip #4 Report Notes

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Report Notes are the digital version of little yellow sticky notes. Attach notes to a specific report field to record comments, suggestions, reminders, or other notes. Notes are saved in the report file for future reference. Report Notes do not print.

### Using Report Notes



1. Open a report and click in a report field.
2. Click **Edit > Notes > Edit**, or click the **Edit Notes**  icon, or right-click and select **Notes > Edit**, or press **F2** on the keyboard.
3. Enter the note text. Click the red **X** to close the note.
4. Click **Yes** to save the note, or click **No** to abandon.

## Tip #5 Image Gallery

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Inserting photos into a report is as easy as drag and drop when using the *Image Gallery* to insert photos into a report from another report, a canister, a file, a memory card or a database. Directions for inserting photos from a file are provided below. See *Inserting Photos into a Report* on the Tech Docs page of our website, [www.appraiserschoice.com](http://www.appraiserschoice.com), or view the video, *Photos and Images*, in the *Editing Reports* section on the inMotion Videos page.

### Inserting Photos from a File

1. Click the **Thumbnails** icon () in the Component List.
2. Click **View > Gallery**, or press **Ctrl+Shift+G** on the keyboard.
3. Click the **Open Gallery from Folder** icon ()
4. Browse to a folder, select the image file, and click **Open**. The image imports into the gallery.

**TIP:** To select multiple images, press **Ctrl** on the keyboard while clicking on the image files. Click **Open** to import images.

5. Click and drag a photo into the corresponding slot in the *Thumbnails*.
6. Click the **X** in the upper right corner of the gallery to exit.

## Tip #6 F4 Function Key

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Use F4 to quickly jump to another section of a report. Press the **F4** function key on the keyboard, select the form section, click **Go to**, and jump to that section.

**NOTE:** Applies to forms with multiple sections.

## Tip #7 Swapping Comparables

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Rearranging comparables is easy when you know the keyboard shortcuts. Need to swap Comps 1 and 3? Click in any field under Comp 1 and press **Ctrl + 3** on the keyboard to swap data, including photos, with Comp 3. See the chart below for additional Comp shortcuts.

Action	Shortcut
Jump to Another Comp	<b>Alt + #</b> (e.g., <b>Alt + 3</b> to Jump to Comp 3)
Copy Field from Subject	=
Copy Subject Column	= =
Copy Field From Comparable Number	= # (e.g., = 2 to Copy a Field from Comp 2)
Copy Comparable Number	= = # (e.g., = = 2 to Copy Entire Comp 2 Column)
Swap Comparables	<b>Ctrl + #</b> (e.g., <b>Ctrl + 3</b> to Swap with Comp 3)

## Tip #8 Insert a Word Document into a Report

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Microsoft® Word docs can be inserted into a report. This feature is only available in addendum pages.

1. Open a report file.
2. Click in a field in the addendum, for example the Beginning Addendum.
3. Click **Edit > Insert > Word Document** on the main menu or right-click and select **Edit > Insert > Word Document**.
4. Browse to the Word file, select the file, and click **Open**. The content of the Word file is inserted into the addendum.

## Tip #9 Auto-replace

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Auto-replace saves you from typing trip-ups and spelling challenges and keeps reports looking professional. Use Auto Replace to enable shortcut keys for frequently typed text. Many shortcuts are predefined: Type **=A** then press the **Enter** key or space bar on the keyboard to insert the word Average, a time-saver on the Comparables grid. Create user defined shortcut keys for other commonly used words.

Auto Replace automatically corrects specified misspelled words. Type “teh” instead of “the” and Auto Replace corrects the spelling. Auto Replace contains a predefined entry to replace “teh” with “the”. Add other commonly misspelled words to further customize the Auto Replace feature.

### Creating User Defined Shortcut Keys

1. Click **Options > Environment > Auto Replace**.
2. Check *Auto Replace* to enable this feature.
3. Enter the text to be replaced in *Replace*. Enter replacement text in *With*.
4. Click **Add** to save the *Auto Replace* entry.
5. Click **OK** to exit **Environment Options**.

**TIP:** Click **Symbols** to insert a symbol in the replacement text (*With* field). Select a symbol and click **Insert**. Click **Close** to return to *Auto Replace*.

## Tip #10 Building a Comps Database

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It's easy to build your own Comparables database of previously reviewed properties using Research. ACI Research is an intuitive comps database that allows the user to locate comps using the same approach most appraisers use, but faster and easier. Research allows the appraiser to access the database, select a "neighborhood," and key in search filters such as price range, design, and exterior finish. The appraiser works with a manageable number of sales from which the "best" comps are chosen and posted directly to the market grid. Research allows users to search for comps using several field parameters; view full comps including thumbnail photos; import comps and photos directly into forms; and export comps and photos from Report to Research.

Want to learn more? See the *Importing Comps from ACI Research* and *Auto-export of Comps to Research* videos on the inMotion Videos page of our website, [www.appraiserschoice.com](http://www.appraiserschoice.com). Research videos are located in the *Editing Reports* section under *Comparable Data*.