



Welcome to Aurora

Admin Configuration Checklist

 Reference our [Help Center articles on account configuration](#) for more information

General Settings and User Management

Configure your [User Profile](#)

Update profile including name, job title, phone number and email address

Update region settings if applicable

Configure [Organization Profile](#)

Update profile section including organization name, logo, address, phone number, and email

Update region settings including regional formatting, temperature, measurement system, and currency

Configure User Management

[Add new users](#) including their profile, and permissions such as license type and role

Add [Roles](#) and [Teams](#) if applicable and available on your account

Add [Partners](#) if applicable and available on your account

Component Configuration

Configure [Components](#)

Toggle on “specify component availability”

Add all components used

Modules

Inverters

DC Optimizers

Combiner boxes, load centers, disconnects, service panels, meters

Component Configuration continued....

- Batteries
- Add pricing to batteries used
- Energy optimizations

Design and Simulation Settings

Configure [Statuses and Warnings](#)

- Customize statuses and warnings as needed

Configure [Design Settings](#)

- Update fire pathway settings as needed

Configure Solar Panel Settings

- Update SAP Min
- Update pitched face tilt threshold, pitched face panel spacing, pitched face panel tilt, pitched face orientation, flat face panel spacing, flat face panel tilt, flat face orientation

Configure AutoDesigner Settings

- Update target energy offset
- Update TSRF Min
- Update default filler row setting

Configure Sales Mode AI roof settings

- Update Sales Mode AI roof settings

Configure Sales Mode Ground Mounts

- Update columns, rows, height, tilt
- Update intermodule spacing, orientation, strings rows, and azimuth

Configure Sales Mode Inverters and Optimizers

- Update “adding inverters to system”
- Update “default inverter manufacturer”

Design and Simulation Settings continued....

Update “allow inverter manufacturer choice”

Configure [Performance Simulations](#)

Update general settings including simulation, shading engine, use LIDAR shading, use horizon shading

Update Aurora simulation settings including irradiance model, inverter clipping, use sub-module simulation if available, weather dataset

Update PV Watts settings including default inverter efficiency, default DC:AC ratio, weather dataset

Update system losses including module nameplate rating, mismatch, connections, light-induced degradation, wiring, soiling, availability, shading, age, snow, other

Configure [Jurisdiction Setbacks](#)

Create jurisdiction setbacks (optional)

Pricing

Configure [Pricing Defaults](#)

Update starting price if applicable

Choose pricing methods

Decide on a default pricing method

Update Base price per watt (PPW)

Update to allow base PPW to be edited or not

Update to show PPW dropdown or not

Configure [Default Financing Settings](#)

Update project life and update whether utility bill savings/feed-in tariffs are taxed

Update system maintenance including degradation, inverter replacement cost, inverter life, storage life

Decide on enabling financing comparisons

Pricing continued....

- Update discount rate (Aurora defaults to 5%. Consult your financial advisor if considering changing this)
- Decide on allowing prepayment amount to be edited, allow for a down payment, and Sales Mode - show payback period
- Update commercial settings if applicable

Configure [Utility and Tax Rates](#)

- Update utility rate escalation including setting a default rate for all projects, set a rate based on location (state)
- Decide to include person tax rates including national and local

Configure [Adders and Discounts](#)

- Create any adders and discounts as needed

Configure [Custom Incentives](#)

- Add custom incentives as needed
*Note that Aurora automatically pulls incentives and utility rates from Genability

Configure [Custom Utility Rates](#)

- Add custom utility rates as needed
*Note that Aurora automatically pulls incentives and utility rates from Genability

Financing

Configure [Custom Financing Products](#)

- Create any custom financing products including loans, leases, and PPAs

Configure [Financing Integrations](#)

- Add financing integrations used such as Mosaic, GoodLeap, Sungage, Dividend, EnFin, and Lightreach

Sales Mode Customization

Configure [Sales Proposals](#)

Create your own sales proposal or begin with a pre-built Aurora template

Add-on Products

Configure [Contract Manager](#)

Configure your Sales Agreements with Contract Manager

Configure [Plan Sets](#)

Update Contractor Settings

Configure [Apps](#)

Configure Integration Apps

Configure any desired APIs - including generating an API key and building webhooks