



Estate Agent Pro Enterprise

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Estate Agent Pro

Forward

by Estate Agent Pro Ltd

*This is the PDF version of our help file which can be used
interactively or printed as a manual.*

Estate Agent Pro Enterprise

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Table of Contents

Foreword	0
Part I Introduction	9
1 What is Estate Agent Pro?	10
2 What Equipment do I Need?	11
3 LAN vs ASP Model	11
Part II Frequently Asked Questions	14
Part III How do I...	19
1 Add a property?	20
2 Add a viewing?	23
3 Add an applicant?	25
4 Add an offer?	27
5 Add images to a property?	30
6 Change an address?	32
7 Create a custom report?	33
8 Create a Word template?	48
9 Create a standard letter?	51
10 Delete applicant or property?	58
11 Filter properties?	59
12 Force Refresh a property or applicant?	63
13 Make properties uploadable?	64
14 Match applicants to properties?	65
15 Match properties to applicants?	67
16 Print address labels?	68
17 Update an Applicant/Vendor?	68
18 Use grid column grouping and filtering?	68
19 Use the contact details grid?	71
20 Use the navigation buttons?	73
21 Use the postcode lookup?	74
22 Use price qualifiers (POA,OIRO. etc...)?	75
Part IV Installing Estate Agent Pro	77
Part V Screens	87
1 Activity Report Screen	88
2 Advertisements Screen	90
3 Applicant/Property Filtering Screen	91
4 Applicants Screen	92

Additional Applicants Tab	98
Mortgage Required Tab	99
Search Criteria Tab	100
Documents Tab	102
Tenancy Screen	103
Archived Applicants Screen	104
5 Applicant/Property Matching Screen	105
6 Automated Viewing Email Error Screen	108
7 Carousel Screen	109
8 Chain Flow Screen	113
Sales Chasing Report	116
Sales Chasing Screen	117
9 Client Review Screen	118
10 Client's Screen	124
Identification Tab	131
Documents Tab	132
11 Communications Screen	133
12 Company Info Screen	137
13 Contacts Screen	138
14 Custom Reports Screen	140
15 Customer Communications Screen	142
16 Dashboard Screen	145
17 Diary Screen	151
18 Event History Screen	158
19 Google Map Screen	159
20 Images Screen	162
Add Image Screen	165
Colour Adjustment Screen	166
Gallery Screen	168
Images Editor Screen	169
Resize Screen	172
Rotate Screen	173
21 Letting's Screen	174
Letting's Income/Expenditure Screen	177
22 Main Screen	178
Admin Tab	183
23 Marketing Screen	184
24 Matches Review Screen	189
25 Mortgage Referrals Screen	193
26 Offer Book Screen	194
27 Offers Screen	196
28 Portfolio Screen	214
Bookmarked Properties Screen	218
29 Property Review Screen	219
30 Properties Screen	223
Advertising Screen	232
EPC Screen	238

Lease Screen	240
Particulars Screen	241
Survey Screen	242
Valuation Screen	244
Vendors Tab	246
Archived Properties Screen	254
31 Report Generator Screen	255
Applicant Search Tab	261
Report Defaults Tab	265
Report Screens	266
Response Monitoring Report.....	266
Solicitors Instructed Report.....	268
32 Sales/Rent Status Screen	269
Sales Chasing Tab	272
Central Notes Tab	273
33 Solicitor Referrals Screen	274
34 Support Screen	275
35 Valuation Report Screen	276
36 Viewing Book Screen	277
37 Viewings Screen	278
38 YTD Statistics Screen	284

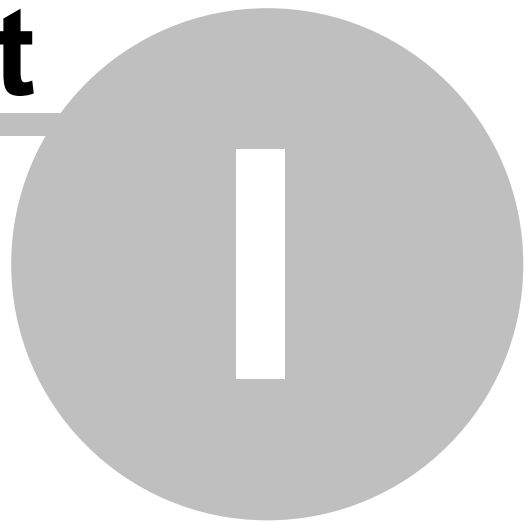
Part VI Ancillary Screens 287

1 Applicants Matching Screen	288
2 Address Screen	290
3 Advanced Money Laundering (AML) Screen	291
4 Applicant Look-up Screen	297
5 Archiving Screen	298
6 Client Look-up Screen	299
7 Clone Property Screen	300
8 Confirmation Dialog	301
9 Copy Dated Note	302
10 Dashboard Validity Check Screen	304
11 Email Screen	304
12 Find Email Screen	309
13 PDF Viewer	311
14 Professional Contacts Screen	313
15 Properties Matching Screen	314
16 Property Look Up Screen	315
17 Quick Inclusions Screen	316
18 Registration Screen	317
19 Report Preview Screen	318
20 Rich Text Viewer/Editor	319
21 SMS Text Messaging Screen	320
22 Stored Templates Maintenance Screen	321

23 Task Screen	322
24 Warning Screen	323
Part VII Synchronisation	326
Part VIII System Administration	329
1 Administration Options	331
2 Applicant Options	331
3 Company Options	336
4 Contacts Options	347
5 General Options	351
6 Modules Options	362
7 Property/Vendor Options	364
8 System Options	371
Part IX Troubleshooting	373
Part X What's New	376
1 Recent Changes	376
2 Future Development	393
Index	394

ESTATE AGENT PRO

Part




Introduction



1 Introduction

Welcome to the Estate Agent Pro help file.


This help file has been designed to provide you with relevant help for all areas of the system. This help file is also provided as a PDF document.

Pressing F1 from any screen in Estate Agent Pro will display the help page for that screen.

What's this help is available for quick help on any field by clicking the  button on the quick access

toolbar  and dragging the icon to the area of the screen that you require help on. Alternatively the help file page for the current screen can be opened by either pressing F1 or the  button.

Throughout this document where we believe that something is of particular significance, we will indicate it as follows:

 *All names, addresses and contact details used in this help file are fictitious.*

The following sections are available within the introduction:

[What is Estate Agent Pro?](#)
[What Equipment do I Need?](#)
[LAN vs ASP Model](#)



Estate Agent Pro Ltd

1.1 What is Estate Agent Pro?

Estate Agent Pro is sophisticated software for running all aspects of your estate agency business.

The system is a Windows client/server application which allows multiple users to use the system with data being automatically synchronised between branches, your own website and property portals.

THE BENEFITS OF THE SYSTEM ARE

- Manage more properties/applicants with fewer staff.
- Communicate with clients immediately via email and text messaging.
- Single source data entry.
- Automatic synchronisation of data between branches.
- Easy production and printing of property particulars.
- Reduction of errors.
- Improved quality of service to clients.

THE PRODUCT COMPRISES

- Activity reporting.
- Applicant to property and property to applicant matching and monitoring.
- Archiving of properties and applicants.
- Automatic synchronisation across multi-branch organisations.
- Automatic upload facility with data being automatically passed on to property portals specified by yourselves and optionally to your own web site if hosted by us.
- Backup of data.
- Carousel system for display in windows or reception area.
- Chain flow recording.
- Client reviewing.
- Communications to clients are stored internally.
- Custom reporting and design.
- Design of your own mail-merged letters.
- Diary system (multi-user).
- Design your own property particulars.
- Emailing including bulk emailing.
- Image capture and editing.
- Letting's marketing and management.
- Live spell checking.
- Management reporting.
- Marketing module.
- Offer entry and monitoring.
- Postcode lookup (additional software required).
- Professional printing of property particulars.
- Property Management.
- Response monitoring.
- Text Messaging including bulk text messaging.
- User definable property classifications and search criteria.
- User definable task lists.
- Viewing entry and monitoring.

1.2 What Equipment do I Need?

This is specified in detail on our [website](#).

1.3 LAN vs ASP Model

Estate Agent Pro Enterprise encompasses the speed, reliance and security of a local database together with the near real-time replication of data to other branches and your own website (if applicable).

WHAT DOES THIS MEAN?

There are basically two permutations of software products available to estate agents. These are:

ASP (Application Service Provider) Model:

ASP is a remotely hosted database accessed via an internet web browser. This will be very similar to the look and feel of internet banking.

LAN (Local Area Network) Model:

This is normally a client/server application with a local database per branch.

ADVANTAGES/DISADVANTAGES COMPARED WITH ESTATE AGENT PRO ENTERPRISE

ASP ADVANTAGES	ESTATE AGENT PRO ENTERPRISE
Access from Anywhere.	A user can access the system from any other branch or from an external location via Microsoft Remote Desktop.
Low startup costs.	The enterprise charging model is based on the ASP model whereby a fixed fee is paid per month. There are no additional fees for support or portal uploads. The number of users per branch is unlimited.
ASP DISADVANTAGES	ESTATE AGENT PRO ENTERPRISE
Data availability and/or data loss.	Estate Agent Pro Enterprise is not an ASP model so it has none of these disadvantages.
Security of sensitive data.	
Database server shared by many users.	
Speed of Access.	
Does not suit complex applications and not user friendly.	
LAN ADVANTAGES	ESTATE AGENT PRO ENTERPRISE
Speed of Access.	Estate Agent Pro Enterprise is a LAN model so has these advantages.
Local backups under own control.	
Better integration with imaging devices, printers, etc.	
LAN DISADVANTAGES	ESTATE AGENT PRO ENTERPRISE
High initial spend.	For branches with more than 2 users a dedicated database server is required. IT infrastructure should be reviewed on an ongoing basis but is

Ongoing IT hardware spend.	not just limited to Estate Agent pro. In this case the ASP Models claim would only apply if you used no other software at all.
No immediate access to changes made in other branches.	Changes made at other branches will be automatically replicated between all branches within a few minutes. If internet access is lost the replication of data will be automatically resumed when it becomes available again.

As can be seen from the above table, Estate Agent Pro Enterprise offers the best of both worlds.

HOW DOES ESTATE AGENT PRO ENTERPRISE ACHIEVE THIS?

This is achieved in a number of ways:

Each branch has it's own local database which can be accessed via our own local application which provides very quick, sophisticated and user friendly access using a standard Microsoft Windows look and feel similar to Microsoft Office 2007. This system is available 24/7 and is not affected by the loss of internet connectivity. The data can be backed up locally and is fully under your control.

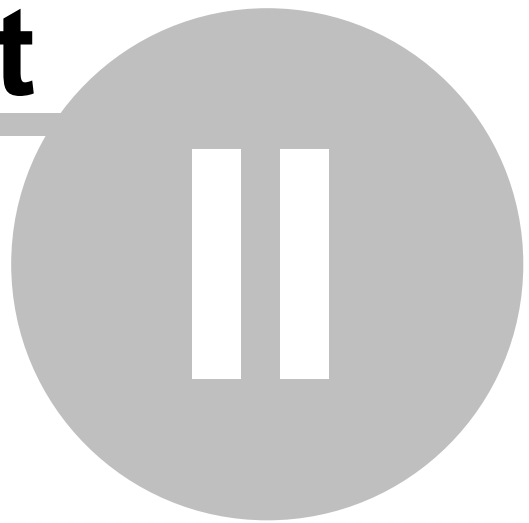
Data is automatically replicated (synchronised) between branches at no additional cost. This occurs every 60 seconds.

Two services run on each PC/Server where your local database is hosted. This PC/Server must be dedicated where a branch has more than two users per branch. One of these services is the database server the other is the replication service. Both of these run automatically without any user intervention and are unaffected by loss of internet connectivity. The worse case scenario if you lose internet connectivity is that the replication process will be delayed until it is restored.

For a technical explanation of the inter-branch communications methodology please see the [Synchronisation](#) Section of this document.

ESTATE AGENT PRO

Part



Frequently Asked Questions

2 Frequently Asked Questions

The answers to frequently asked questions are detailed below.

CAN EAP RECEIVE INCOMING SMS MESSAGES?

No, however the outgoing message could include the number of a mobile or landline capable of receiving SMS messages

WHY DOES MY PROPERTY APPEAR ON MY OWN WEBSITE AND NOT RIGHTMOVE?

This is almost always due to the property Classification settings. As properties can be searched for by type on Rightmove, the classifications Style and Type must be set in EAP and these settings must have valid portal mappings. The portal mappings must be set up by the system administrator.

WHICH PROPERTY PORTALS CAN I USE EAP TO SEND DATA TO?

Currently EAP can be used to send data to are:

- Rightmove
- Fish4
- Homeflow
- Boomin
- The Home Sale Network
- The digital property group (Prime Location, findaproperty)
- Iceberg
- Look4aProperty
- Mayfair Office
- Movewithus
- PropertyLive
- Property Finder
- Property Platform
- Radar Homes
- Zoopla

And we are constantly adding to this list.

DO STANDARD LETTER TEMPLATES SYNCHRONISE?

Standard letter templates do not synchronise across branches. However if you want to set up some standard company template letters at one branch, we can help you to copy them across to your other branches. Please contact [Technical Support](#) for help with this.

WHY CAN'T I DELETE A RECORD WITHOUT ARCHIVING IT FIRST AND WHY ONLY ONE AT A TIME?

O

To prevent accidental deletions, EAP has been designed so that an applicant or property record has to be archived first, also only one record can be deleted or archived at a time. This is because once a record is deleted, there isn't a 'Recycle Bin' to restore from, they would have to be retrieved from a back up file, which may mean losing recently added data.

WHICH EAP FIELDS ARE USED TO SUPPLY DATA TO THE PORTALS?

Key Features:

Used on portals such as Rightmove and others, these are picked up from the [Properties Screen>Advertising Tab>Key Features Tab](#). Each feature needs to be on a separate line and there is no need to add 'bullet' points.

Summary Text:

The brief description of a property that is normally displayed in the search results portal search results, is taken from the first 300 characters of the 'Advert & Portal text'. This field is found on the [Properties Screen>Advertising Tab>General Tab](#). Some portals such as Rightmove impose a limit of 300 characters including spaces for summary text, hence the field is set to default to this. If you need to change this, please contact your System Administrator.

More/Full Details:

The room description text for pages such as the 'More Details' page on Rightmove, is taken from the 'Full Details' section on the [Properties Screen>Particulars Tab](#).

Display Address:

The default address displayed on websites is normally the Town+County fields from the property address. However, if you want to display something other than this on portals and your website if fed by EAP, this can be done by setting the 'Web' address field on the [Properties Screen>Advertising Tab>General Tab](#).

For example by default 133 Stephens Road, Tunbridge Wells, Kent, would have a display address of 'Tunbridge Wells, Kent'. Using the Web address field you can set it to appear on websites as: St Johns area, Tunbridge Wells

WHY HASN'T MY PROPERTY UPDATED/APPEARED?

If a property is not updated with a data change or has not appeared at all on a portal such as Rightmove, please double check that the data is correct on the property record. See [How do I make properties uploadable?](#) If no changes were necessary ask your System Administrator to set the property to 'Force Refresh'. When the property will update/appear will depend on when the Portal updates their website.

If your property has still not updated by the following morning, please use the [Support Screen](#) to contact us with details of the property in question, so that we can investigate further.

HOW OFTEN DO THE PORTAL WEBSITES GET UPDATED.?

How often will depend on when the portals themselves process data. For instance, Rightmove is updated immediately after we receive your upload. Boomin and Zoopla are updated every 30 minutes. The other portals are normally updated once a day.

Other than Rightmove, we have no control over exactly when a portal processing run will take place or at what point in the processing run your data will be processed, but it's normally within an hour of it starting. Images may take slightly longer to appear due to the way portals store them, but normally they will appear at the same time as the property.

WHEN AND HOW SHOULD I BACK UP MY DATA?

The EAP folder should be backed up every day and a recent copy should be kept off site.

There are several methods of backing up data, the one that is best for you will depend on your hardware set up and how much EAP data you need to store. It's best to discuss this with your IT engineer who will be able to assist you.



It is your responsibility to ensure that the EAP database is backed up. If this is not done then, in the event of say, a hard disk failure, all of your data will be lost and will have to be re-input.

HOW CAN I CHANGE THE VAT RATE USED IN EAP?

The VAT rate is set in 'Branches' section of Admin, please ask your system administrator to update this.

WHEN IS THE CLIENT REVIEW DATE AUTOMATICALLY UPDATED?

Estate agent pro automatically updates the next client review date based on settings defined in Admin:

Automatic Reviews
<input checked="" type="checkbox"/> Review frequency change
<input checked="" type="checkbox"/> Client Review
<input checked="" type="checkbox"/> Progress Review
<input checked="" type="checkbox"/> Applicant Matches Review
<input checked="" type="checkbox"/> Applicant details changed
<input checked="" type="checkbox"/> Applicant offer added or amended
<input checked="" type="checkbox"/> Applicant sales chasing event entered
<input checked="" type="checkbox"/> Applicant viewing added or amended
<input checked="" type="checkbox"/> Applicant data changed
<input checked="" type="checkbox"/> Applicant dated note added or amended
<input checked="" type="checkbox"/> Applicant communication sent
<input checked="" type="checkbox"/> Vendor offer added or amended
<input checked="" type="checkbox"/> Vendor sales chasing event entered
<input checked="" type="checkbox"/> Vendor viewing added or amended
<input checked="" type="checkbox"/> Vendor asking price change
<input checked="" type="checkbox"/> Vendor data changed
<input checked="" type="checkbox"/> Vendor dated note added or amended
<input checked="" type="checkbox"/> Vendor communication sent



Automatic updating of the next review date can be turned off in Admin>General>Options. The next review date can also be manually changed in the applicant and property screens.

WHY ARE CURRENCY FIELDS SHOWING IN US DOLLARS?

Estate Agent Pro does not have its own currency or date settings, like most applications it relies on the Windows operating system for them.

Please check that the 'Regional Settings' or 'Region and Language' settings, found in the Windows control Panel are correct on your computer.

Please note that if you are on a Windows 7 machine, there is a known Microsoft bug that causes issues with non-US currency applications. It seems that if the correct 'Locale' info is selected during the Windows installation, even though it will then show correctly on the regional settings screen, the Windows operating system returns the USA currency and date format (MMDDYY) when our application requests it.

To correct this please try the following:

Go to: Windows > Control panel > Region and Language > Formats.

Change the Format setting to "English (USA)",
Click [OK].

Restart your computer

Change the Format setting to "English (United Kingdom)",
Click [OK].

Restart your computer.

WHAT IS THE METHOD USED TO SYNCHRONISE DATA?

The data chain/upload cycle is as follow:

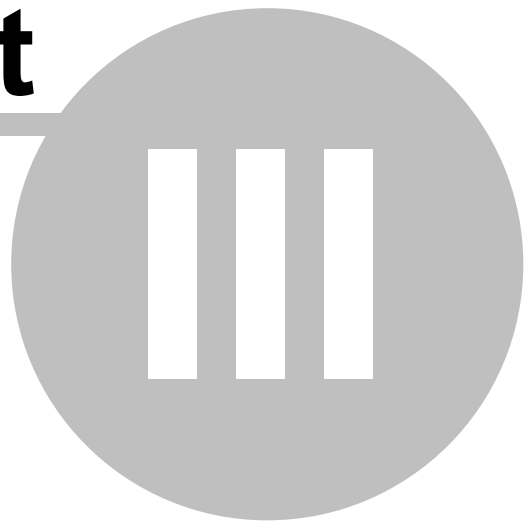
1. The EAP Client services program sleeps for one minute and when it wakes, checks for any data changes since the last upload.
2. The upload program collates the changes into a zip file, which is then uploaded to our FTP server.
3. If branches are synchronising data: Once the file upload has completed, the EAP Client services program will check for any new files from the other branches, download them and update the EAP database.
4. Our main database also 'wakes up' after a minutes sleep.
5. The main database runs a 'download cycle' where it checks our FTP server for any new data files uploaded by all of the EAP agents who upload their data to us. The new data files are processed in turn.
6. The 'Upload cycle' starts as soon as the 'Download cycle' has completed.
7. The 'Upload cycle' first posts changes of 'Live' data, directly to the databases of websites we host or those that use a mySQL database in our format..
8. Once the website databases have been updated, the portals or websites we feed with a Rightmove format file or similar have a data file uploaded to them. When this occurs will depend on the maximum frequency the recipient has requested we upload the files.
9. Once we have uploaded the data file to the FTP server of the portal or website, we have no control over when it is processed or the order the files are processed in.

WHY HASN'T THE EMAIL I SENT OUT OF EAP BEEN RECEIVED?

When an email is sent out of EAP we can only guarantee that the email has been successfully sent to your outgoing email server. If your email server cannot deliver an email it will email you back giving the reason why. This can occur between a few seconds and up to a week later depending on the server being used.

ESTATE AGENT PRO

Part



How do I...

3 How do I...


The following how to's are available:

- [How do I add a property?](#)
- [How do I add a viewing?](#)
- [How do I add an applicant?](#)
- [How do I add an offer?](#)
- [How do I add images to a property?](#)
- [How do I change an address?](#)
- [How do I create a custom report?](#)
- [How do I create a Word template?](#)
- [How do I create a standard letter?](#)
- [How do I filter properties?](#)
- [How do I force refresh a property or applicant?](#)
- [How do I make properties uploadable?](#)
- [How do I match an applicants to properties?](#)
- [How do I match properties to applicants?](#)
- [How do I print address labels?](#)
- [How do I update an Applicant/Vendor?](#)
- [How do I use grid column grouping and filtering?](#)
- [How do I use the contact details grid?](#)
- [How do I use the navigation buttons?](#)
- [How do I use the postcode lookup?](#)
- [How do I use price qualifiers \(POA,OIRO. etc...\)?](#)

3.1 Add a property?

1. To add a property, on the main screen click on the properties button. This will open the [Properties Screen](#).



2. At the bottom left of the screen there is a navigator panel. Click on the  button. This will open the client screen where you can choose an existing client as the vendor or add a new one. See [How do I use the navigation buttons?](#) for further information on the navigation panel.




3. If you know that the client is already in the database, for example he or she is already registered as an applicant, click on the drop down button of the Surname field and you will be able to select him/her from the list. If it is a new client this screen must be completed.

A screenshot of a client entry form. The title bar says 'Either choose an existing client as the vendor or enter the new'. Below the title bar are two groups of buttons: 'File' (Save & Exit, Cancel & Exit, Clone Client) and 'Communications' (New, Draft & Sent). The form is divided into two main sections: 'Name & Address' and 'Notes'. The 'Name & Address' section contains fields for Surname (with a dropdown arrow), Title (with a dropdown arrow), Initials, First Name, Greeting, Company Name, Job Position, and Address. The 'Notes' section is a large text area on the right.


See the [Client's Screen](#) for more information.


When finished click on the Save & Exit button which will then validate that all data has been entered before returning you to the property screen.

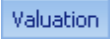
 At least one contact number must be provided.






If you wish to cancel the adding of a property click on the Cancel & Exit Button.

4. The property address will have been set to that of the vendor. If that is incorrect click on the bar on the right hand side of the address in order to change it.

Address	The Old Barn Tunbridge Wells Kent TN2 5HS	
---------	--	---

 If you have AFD Software's postcode lookup software [Postcode Plus](#) installed on the PC you are using, you will be able to use the postcode search capabilities

5. If you have agreed a valuation date with the vendor click on the  tab and enter it here. It will be automatically added to the diary with a reminder set for the valuer.

Details	
Date	31/08/2010 
Time	12:00  
Valuer	Moz 
Cancelled	No 

6. If you have entered a postcode for the property you can retrieve directions from your office to the property which will be included in the Valuation template when the valuer prints it out. To do this click on the Google Directions button.




There will be a slight delay while this data is retrieved. It is stored in the Directions and additional Information text box and can then be edited to customise it. These directions can be automatically included in your property particulars. An example is shown:

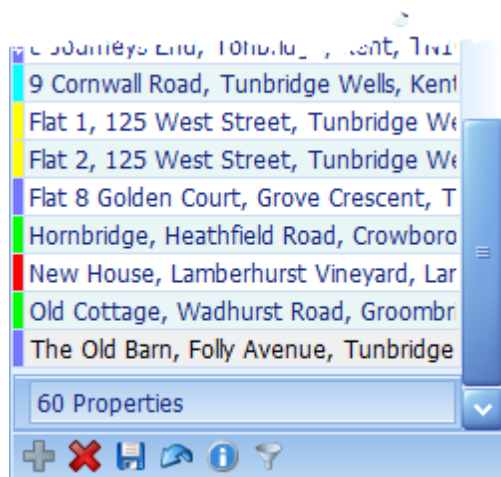
From Morley Rd

1. Head east on Morley Rd toward Vale Rd (285 feet).
2. Turn left at Vale Rd (190 feet).
3. At the roundabout, take the 2nd exit onto Vale Rise/A26. Continue to follow A26. Go through 1 roundabout (1.2 miles).
4. At the roundabout, take the 2nd exit onto Vauxhall Ln/A2014. Continue to follow Vauxhall Ln (0.5 miles).
5. Turn left to stay on Vauxhall Ln (1.5 miles).
6. Turn left at London Rd/A26. Continue to follow A26. Go through 1 roundabout (3.0 miles).
7. At the roundabout, take the 1st exit onto Nevill St/A267. Continue to follow A267 (0.6 miles).
8. Turn left at Birling Rd/B2169. Continue to follow B2169 (0.2 miles).
9. Take the 1st right onto Wallace Close. Destination will be on the left (217 feet).

Distance: 7.0 miles Duration approximately: 18 mins
From Map data ©2010 Tele Atlas


7. You can then complete entering the rest of the data you have for the property. To save the entries made on the property screen click on the  button on the navigator at the bottom left hand side of

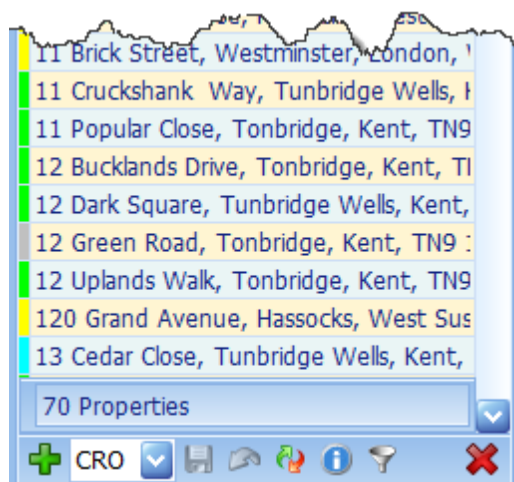
the properties grid.




The property is added with a status of valuation. There is no automatic check that all necessary data has been provided at this stage as the property has not yet been valued and therefore you can't know all details as the request for a valuation has probably been received by phone.

Once the valuation has been carried out the data must be updated accordingly.

 If you have been configured to be able to add a property for another branch there will be an additional drop down visible to select the branch you wish to add to. By default this is your own branch.



If you select another branch's mnemonic here, there will be an additional confirmation prompt when you click on the  button.

Please see the following for more information.

[How do I make properties uploadable?](#)

[How do I add images to a property?](#)

[How do I add an offer?](#)

[How do I add a viewing?](#)

[How do I match properties to applicants?](#)

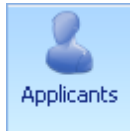
[How do I match applicants to properties?](#)

[How do I filter properties?](#)

3.2 Add a viewing?

You can add a viewing from either the [Main Screen](#), the [Applicants Screen](#) or the [Properties Screen](#). In this example we will do it from the applicants screen.

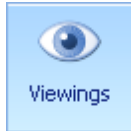
1. On the main screen click on the applicants button.





2. Navigate to the applicable applicant either by clicking on them or using the search facility.




3. Click on the viewings button. This will open the [Viewings Screen](#).



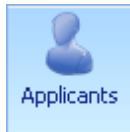
4. All viewings entered for the applicant will be displayed. Click on the  button on the navigator panel. This will display a list of properties. Select the one the applicant wishes to view and then click on the  button on the quick access toolbar. A new entry will be added to the list of viewings. The date defaults to today, and the time to 12:00, change these to the date and time of the viewing. If the viewing is to be accompanied check the **Accomp** column and select who will be doing it from the **Accomp by** drop down list. Also complete the **Meet** column. The Diary for the day of the viewing will be automatically displayed to help you select who is available to accompany the viewing.


5. If you have confirmed the viewing with the vendor, check the **V Conf** column. If confirmed with the applicant check the **A Conf** column.

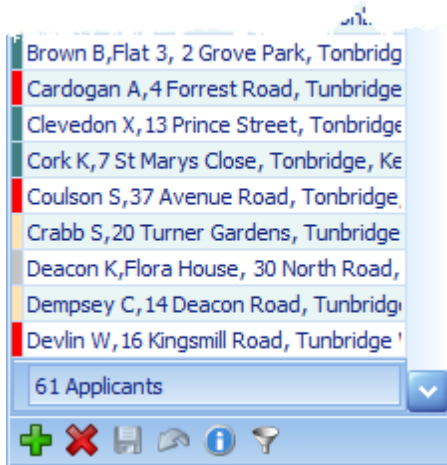
6. Enter any other information and then click on the  button on the navigator panel to save the viewing. The viewings screen can now be closed.

3.3 Add an applicant?

1. To add an applicant, on the main screen click on the applicants button.




2. At the bottom left of the screen there is a navigator panel. Click on the  button. This will open the client screen where you can choose an existing client as the applicant or add a new one. See [How do I use the navigation buttons?](#) for further information on the navigation panel.




3. If you know that the client is already in the database, for example he or she is already registered as a vendor, click on the drop down button of the Surname field and you will be able to select him/her from the list. If it is a new client this screen must be completed.

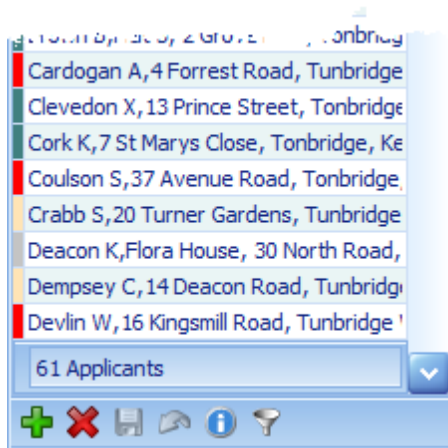
See the [Client's Screen](#) for more information.

When finished click on the Save & Exit button which will then validate that all data has been entered before returning you to the [Applicants Screen](#).

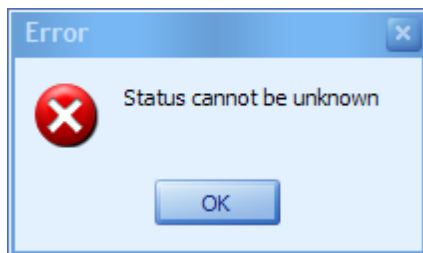
 *At least one contact number must be provided.*

If you wish to cancel the adding of an applicant click on the Cancel & Exit Button.

4. You can then complete entering the rest of the data you have for the applicant. To save the entries made on the applicant screen click on the  button on the navigator at the bottom left hand side of the applicants grid.



The data entered will be validated and if any mandatory fields are incomplete an error message will be displayed:



The applicable tab will be focused with the appropriate field coloured yellow:

Status 

5. Once all mandatory fields have been supplied, some of which are configurable by yourselves, you will be able to save the new applicants record.

See the following for more information.

[How do I add an offer?](#)

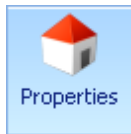
[How do I add a viewing?](#)

[How do I match properties to applicants?](#)

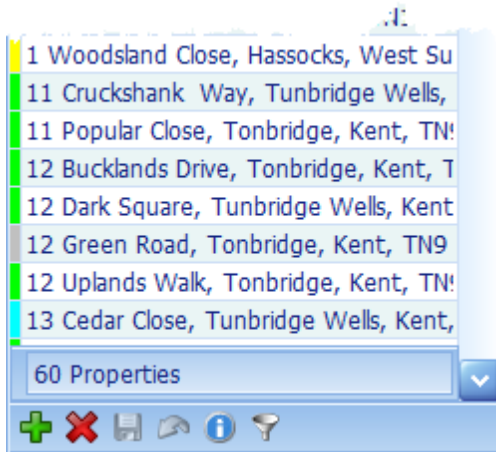
[How do I match applicants to properties?](#)

3.4 Add an offer?

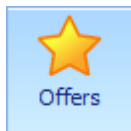
1. To add an offer to a property, on the main screen click on the properties button. This will open the [Properties Screen](#).



2. Navigate to the applicable property either by clicking on it or using the progressive search facility.



3. Click on the offers button. This will open the [Offers Screen](#).



4. Depending on:

a. If this is the first offer by the applicant on this property:

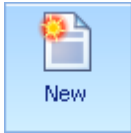
Click on the button under the applicant list, select the applicable applicant from the applicant look-up screen and then click on the button, record any other relevant information on the right hand side of the screen, and then click on the button under the applicant list to save the entry.

b. If it is not the first offer by the applicant on this property:

Navigate to the applicable applicant by either clicking on them or using the progressive search facility.

5. Click on the button under the offer list (bottom left hand corner of the screen) and enter the offer amount. If you are recording an historical offer you will need to adjust the date and time accordingly. Enter any comments and any other relevant information then click on the button on the offer list navigator.

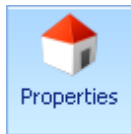
6. You can send a communication to the vendor regarding this offer by clicking on new communications button. This will open the [Communications Screen](#).



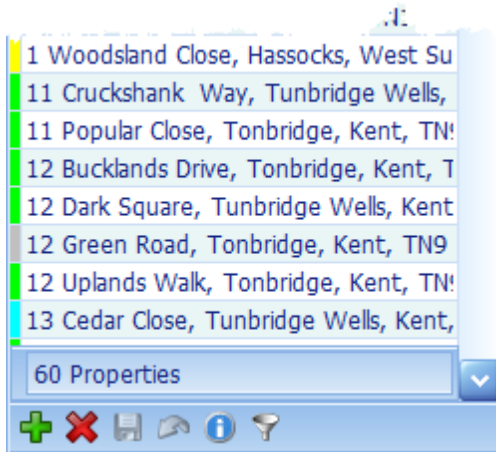
7. Select the letter you wish to use and then either email, text or print the letter for sending by post to the vendor. This will record that the offer has been sent to the vendor. Offer letters must have been defined for you to be able to use this facility.
8. The [Offers Screen](#) can now be closed.

3.5 Add images to a property?

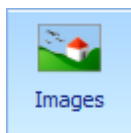
1. To add images to a property, on the main screen click on the properties button. This will open the [Properties Screen](#).



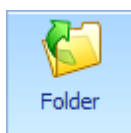
2. Navigate to the applicable property either by clicking on it or using the progressive search facility.



3. Click on the Images button. This will open the Images screen.



4. Click on the Load from Folder button.

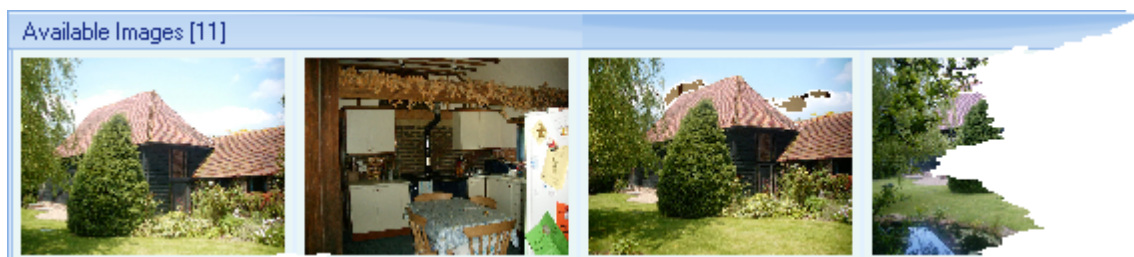


This will display the following screen:



The default folder to load from can be configured by your system administrator and would normally be set to your digital camera. If this is incorrect select the folder you wish to load images from and then click on the OK button.

5. The available Images area will be populated with all images from the selected folder.



6. One by one click on the images you wish to use and drag and drop them to the applicable area of the primary images tab.



7. Click on the caption area and enter a caption as appropriate.



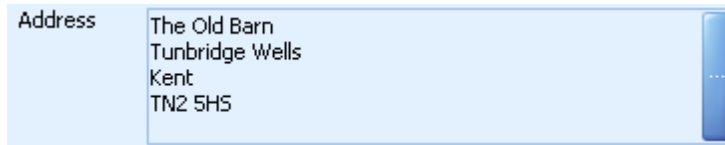
8. Repeat as above for all images you wish to assign and then click on the Save button.



This will save all images allocated and close the [Images Screen](#).

3.6 Change an address?

The editing of all addresses is now done through a common interface.



Wherever an address is displayed, clicking on the button on the right of the address will open a screen that enables it to be edited.

See the [Address Screen](#) for more information.

3.7 Create a custom report?

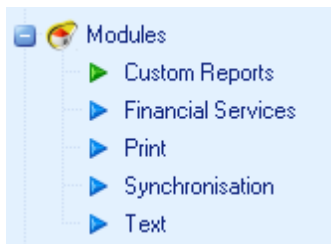
In this example we will create a custom A4 advertising report with a banner image across the top, the main image of the property, the display address and the price qualifier. There will be 12 properties per page. The finished advertisement we are trying to create will look like this:



There are 8 steps required to create this custom report.

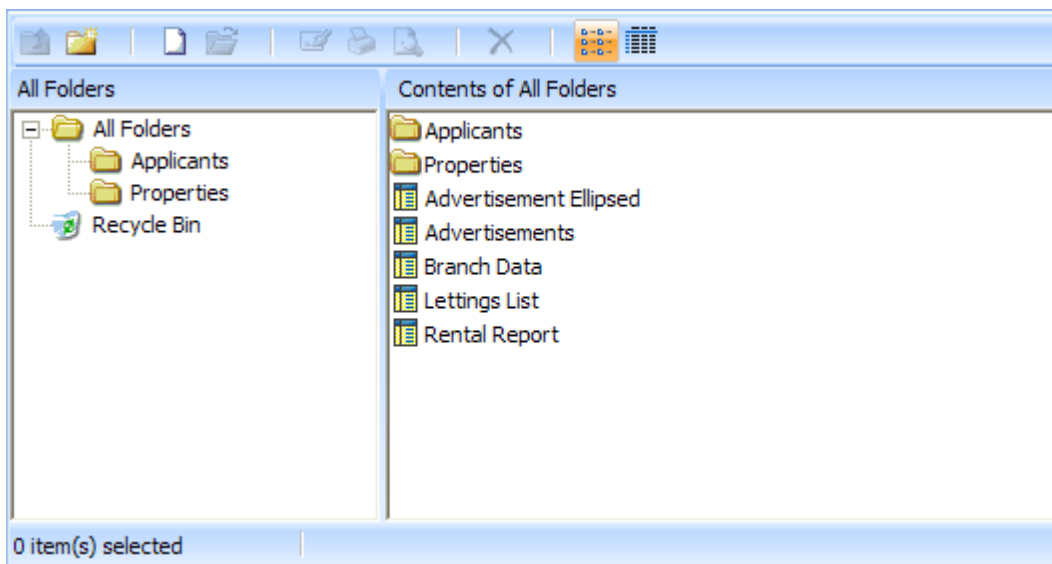
1. CREATE THE CUSTOM REPORT.

- a. From within [System Administration](#) expand the Modules group and click on the **Custom Reports** option.

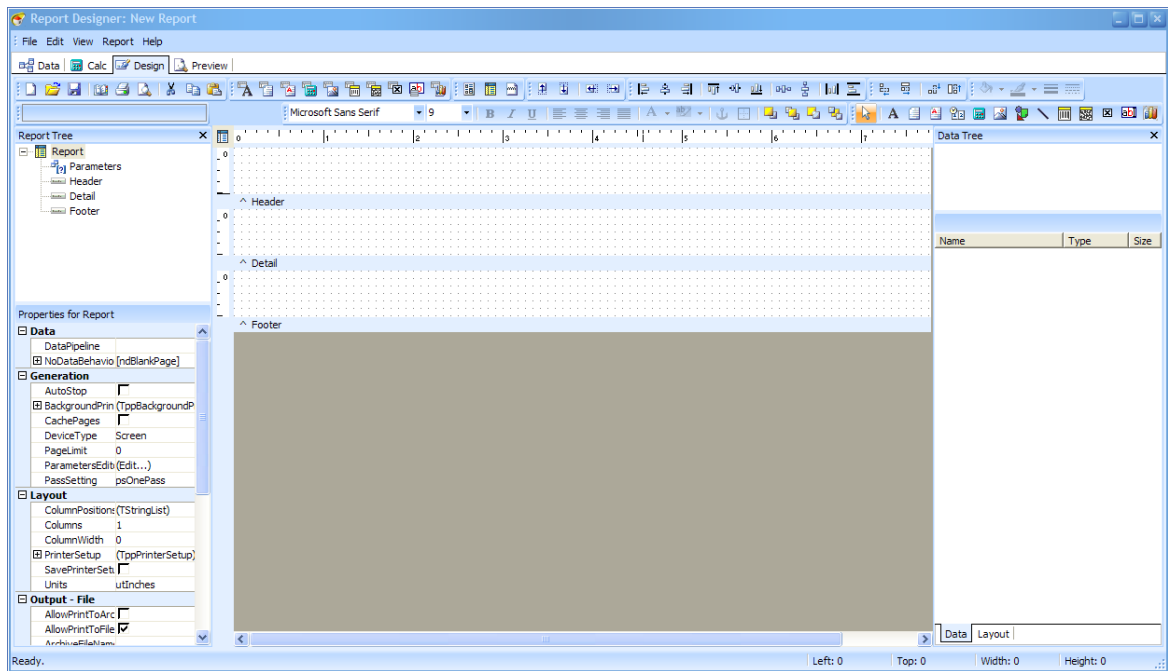


- b. This will display the report explorer. Reports created within the Properties folder are available for generation from the [Report Generator Screen](#). As we want this to be the case click on the

Properties folder and then click on the  (new report button) on the toolbar.



- c. The Custom Report Designer screen will be displayed.



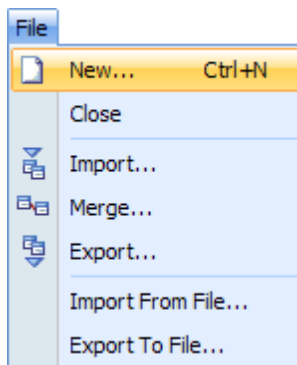
d. The report defaults to A4 with margins all round of a quarter of an inch. These settings can be changed by clicking on the Page Setup. in the Files menu.

2. DEFINE THE DATA TO BE USED IN THE CUSTOM REPORT

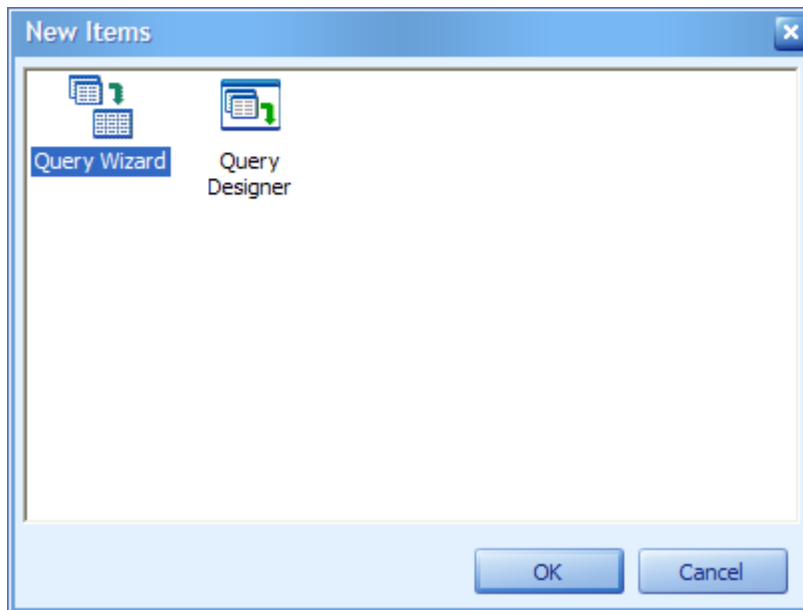
a. The first thing that we need to do is to define the data to be included in the report. Click on the Data tab on the main menu.




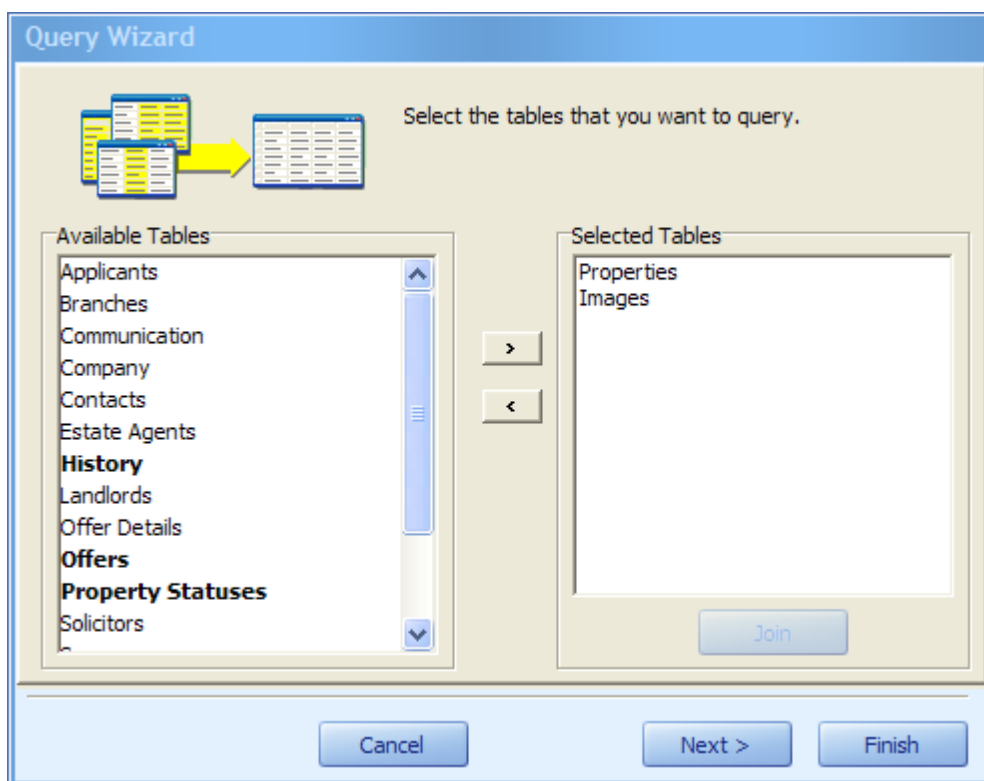
b. And then click on the **New..** menu item.




c. And then click on the **Query Wizard** and click the **OK** button.

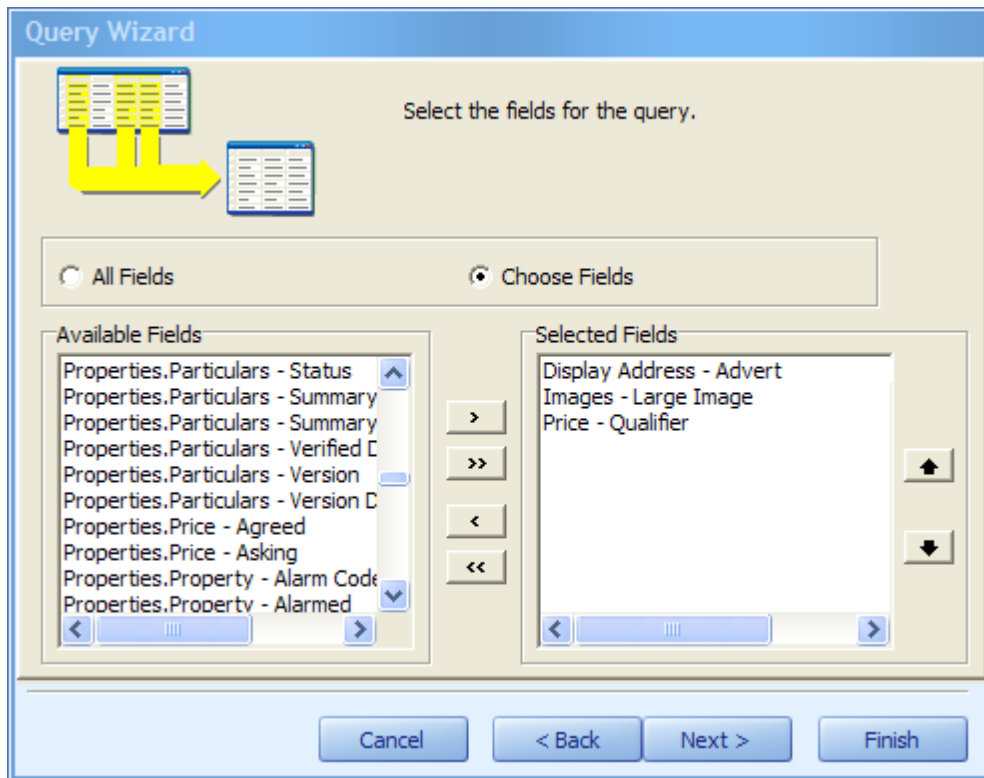


d. Click on **Properties** in the Available Tables list and click on the  button and then do the same for **Images** and then click on the **Next** button.

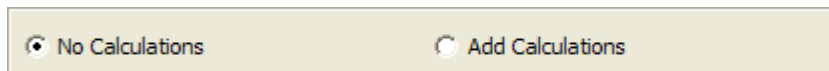


e. You will be given the choice between All Fields and Choose Fields. Click on **Choose Fields** and the list of available fields for both tables will be displayed. One by one click on the following field names and then click on the  button to include them. When finished click on the **Next** button.

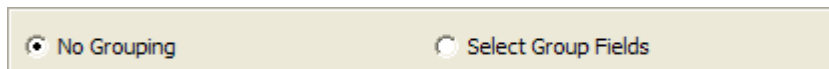
Display Address - Advert
 Images - Large Image
 Price - Qualifier



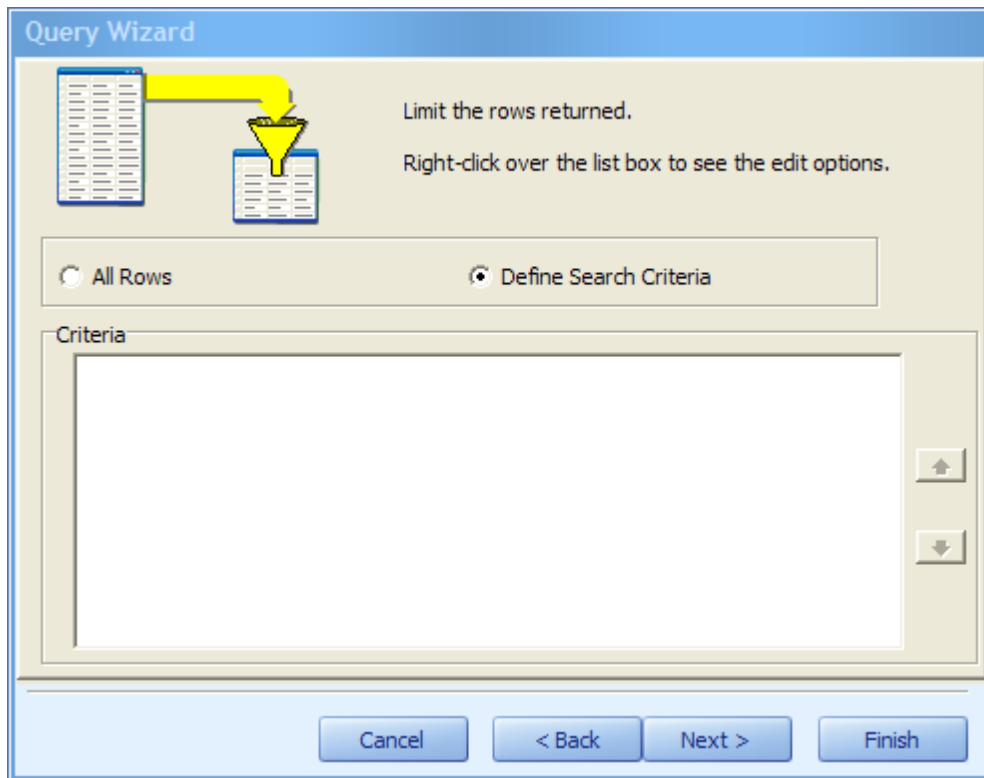
f. Choose **No Calculations** in the next screen and click on the **Next** button.



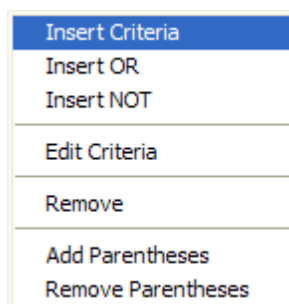
g. Choose **No Grouping** in the next screen and click on the **Next** button.



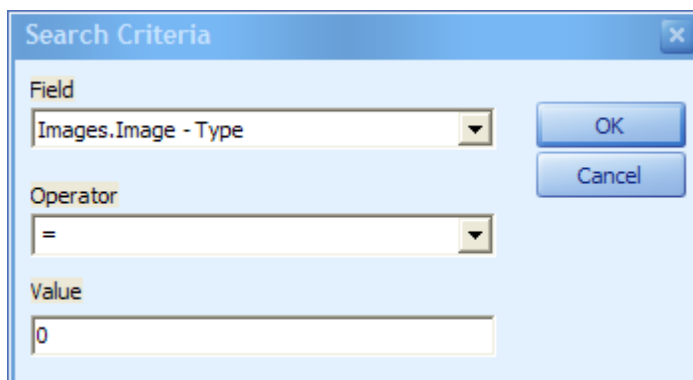
h. The next screen defines search criteria where the content of the report can be limited. We need to limit the data returned because we only want one image, the main one.



i. Click **Define Search Criteria** and then right mouse click in the criteria list box and select **Insert Criteria**.



j. The Image - Type for the main image is 0. Complete the dialog as shown and then click on the **OK** button.



k. **Images.Image - Type = 0** will be displayed in the criteria list box. Click on the **Next** button.

Query Wizard

Order the rows of the query based on field values.

☐ Natural Order ☒ Set Order



Available Fields

- Properties.Particulars - Full Detail
- Properties.Particulars - Status
- Properties.Particulars - Verified C
- Properties.Particulars - Version
- Properties.Particulars - Version C
- Properties.Price - Agreed
- Properties.Price - Qualifier
- Properties.Property - Alarm Code
- Properties.Property - Alarmed
- Properties.Property - Branch

Selected Fields

Properties.Price - Asking (Descending)

Cancel < Back Next > Finish

l. We want to sort this report by the property asking price with the highest property shown first. To do this select **Properties.Price - Asking** in the list of available fields and then click on the  button to include them. Then click on the  button to sort it in reverse order (descending). Finally click on the **Next** button.

Query Wizard

You have finished defining your query.

Please enter a description of your query.

Name

Properties

Do you want to preview your query or modify your query's design?

☒ Return to data workspace
☐ Preview the query
☐ Modify the query's design

Cancel < Back Finish

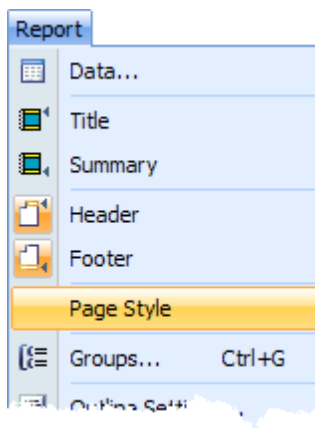
m. The query wizard is complete. Click on the Finish button.



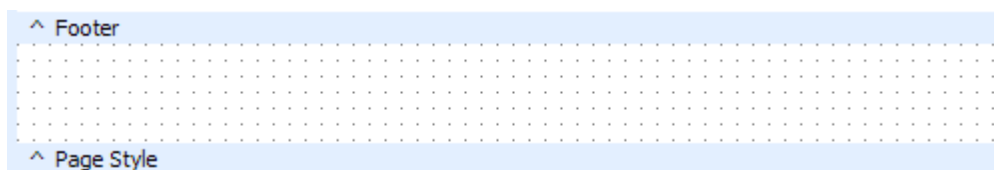
n. Click on the Design tab to start the next step.

3. SET THE BACKGROUND COLOUR

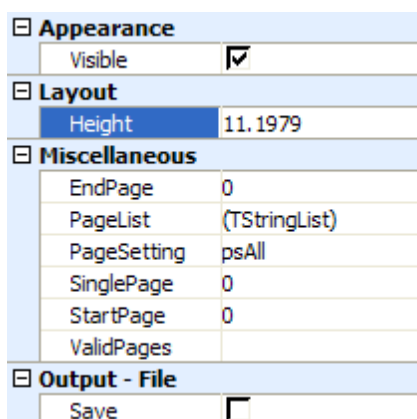
a. The easiest way to set the background colour is to create a page style and put a shape on it. To do so click on the **Report** menu and select **Page Style**.




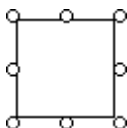
b. This will add the page style band to the report designer.



c. Click into the page style band and set it's height to 11.1979 (inches) which is the whole A4 page less the top and bottom margins.



d. Click on the  button on the toolbar and then click back into the page style band anywhere to place the shape there.




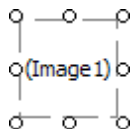
- e. Tick the **ParentHeight** and **ParentWidth** check boxes and set the **Brush Color** and **Pen Color** properties to red.


Appearance	
Brush	(TBrush)
Color	clRed
Style	bsSolid
Pen	(TPen)
Color	clRed
Mode	pmCopy
Style	psSolid
Width	1
Shape	stRectangle
Visible	<input checked="" type="checkbox"/>
Identity	
UserName	Shape1
Layout	
Height	11.1979
Left	0
ParentHeight	<input checked="" type="checkbox"/>
ParentWidth	<input checked="" type="checkbox"/>
Top	0
Width	7.7708001
Layout - Dynamic	
Anchors	[atLeft, atTop]

4. SET THE HEADER IMAGE

- a. Scroll to the top of the report and increase the size of the header band by dragging it down. A few inches will do as we just want room to insert a banner image. We will resize the header band afterwards.

- b. Click on the  button and then click back into the header band anywhere to place the image there.



- c. Click on the **Picture** property and then click on the  button shown against it to load the image to use. Tick the **MaintainAspectRatio** checkbox, set **Left** to 0.25, **Top** to 0.25 and **Width** to 7.2708001 and finally tick the **Stretch** check box.

Appearance	
Border	(TppBorder)
DirectDraw	<input type="checkbox"/>
MaintainAspect	<input checked="" type="checkbox"/>
Transparent	<input type="checkbox"/>
Visible	<input checked="" type="checkbox"/>
Content	
Picture	(TPicture)
Identity	
UserName	Image1
Layout	
AlignHorizontal	ahCenter
AlignVertical	avCenter
Height	1.5104001
Left	0.25
Top	0.25
Width	7.2708001
Layout - Dynamic	
Anchors	[atLeft, atTop]
AutoSize	<input type="checkbox"/>
ReprintOnOverl	<input type="checkbox"/>
Stretch	<input checked="" type="checkbox"/>

d. Click into the empty area of the header band and set its **Height** to 2.0104001. This will vary according to the image you use but should be 0.5 inches greater than the height of the image.

Appearance	
Visible	<input checked="" type="checkbox"/>
Layout	
Height	2.0104001
PrintOnFirstPag	<input checked="" type="checkbox"/>
PrintOnLastPag	<input checked="" type="checkbox"/>
PrintPosition	0
Layout - Dynamic	
BottomOffset	0
PrintHeight	phStatic
Output - File	
Save	<input type="checkbox"/>

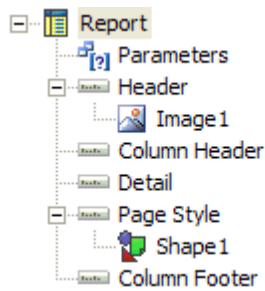
5. REMOVE THE FOOTER BAND

We do not want a footer in this report so click on the **Report** menu and select Footer to turn it off. The footer band will be removed from the report.

Report	
Data...	
Title	
Summary	
Header	
Footer	
Page Style	
Groups...	Ctrl+G

6. SET THE NUMBER OF COLUMNS

- a. In the **Report Tree** panel click on **Report**.



- b. Set the number of **Columns** to 3 and the **ColumnWidth** to 2.51.

The Properties window for the Report component is shown. It is divided into several sections: Data, Generation, Layout, and Output - File. The Layout section is currently selected, showing properties for Columns and ColumnWidth.

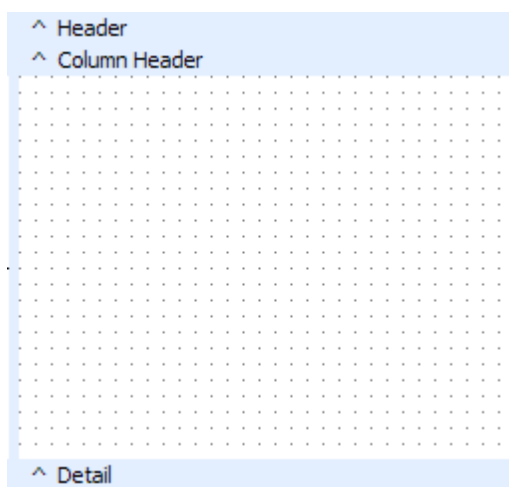
Data	
DataPipeline	Properties
NoDataBehavior	[ndBlankPage]

Generation	
AutoStop	<input type="checkbox"/>
BackgroundPrint	(TppBackgroundP)
CachePages	<input type="checkbox"/>
DeviceType	Screen
PageLimit	0
ParametersEdit	(Edit...)
PassSetting	psOnePass

Layout	
ColumnPosition	(TStringList)
Columns	3
ColumnWidth	2.51
PrinterSetup	(TppPrinterSetup)
SavePrinterSet	<input type="checkbox"/>
Units	utInches

Output - File	
AllowPrintToArc	<input type="checkbox"/>
AllowPrintToFile	<input checked="" type="checkbox"/>
ArchiveFileName	

- c. This will re-display the detail band as shown.



7. DEFINE THE CONTENTS OF THE DETAIL BAND

- a. Click into the detail band and set the **ColumnTraversal** to `ctLeftToRight`, the **Height** to 2.0313001 and the **BottomOffset** to 0.25.

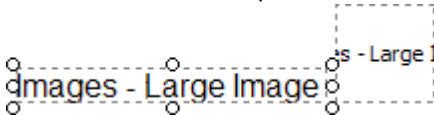
Appearance	
Visible	<input checked="" type="checkbox"/>
Generation	
BandsPerRecord	1
ColumnTraversal	ctLeftToRight
PrintCount	0
Layout	
Height	2.0313001
PrintPosition	0
Layout - Dynamic	
BottomOffset	0.25
PrintHeight	phStatic
Output - File	
Save	<input type="checkbox"/>

- b. In the **Fields for Properties** panel drag the Images - Large Image to the top left of the detail band.

Name	Type	Size
Images - Large Image	Graphic	
Price - Qualifier	String	80
Display Address - Adv...	String	40




- c. We don't need a caption so click on the caption and press the **delete** key.




- d. Set the **Height** to 1.6, **Left** to 0.25, **Top** to 0 and **Width** to 2.25.


Data	
DataField	LargeImage
DataPipeline	Properties
GraphicType	JPEG
ParentDataPipeline	<input checked="" type="checkbox"/>
Identity	
UserName	DBImage1
Layout	
AlignHorizontal	ahCenter
AlignVertical	avCenter
Height	1.6
Left	0.25
Top	0
Width	2.25
Layout - Dynamic	
⊞ Anchors	[atLeft, atTop]
AutoSize	<input type="checkbox"/>
ReprintOnOverflow	<input type="checkbox"/>

- e. Click on the  button on the toolbar and then click back into the detail band in a blank area to add the shape. We will use a background colour of white for the two fields we need to add. Set the Pen **Color** to be white and the layout **Height**, **Left**, **Top** and **Width** properties as shown.

Appearance	
Brush	(TBrush)
Pen	(TPen)
Color	<input type="checkbox"/> dWhite
Mode	pmCopy
Style	psSolid
Width	1
Shape	stRectangle
Visible	<input checked="" type="checkbox"/>
Identity	
UserName	Shape2
Layout	
Height	0.43130001
Left	0.25
ParentHeight	<input type="checkbox"/>
ParentWidth	<input type="checkbox"/>
Top	1.6
Width	2.25

- f. We will add the two remaining fields in a different way as this avoids a caption being automatically added. On the main toolbar click on the  button and then click on the shape we just added and set the Layout **Height**, **Left**, **Top** and **Width** properties as shown.


Calculations	
ResetGroup	
Data	
DataField	Town
DataPipeline	Properties
ParentDataPipeline	<input checked="" type="checkbox"/>
Identity	
UserName	DBText1
Layout	
Height	0.16670001
Left	0.28130001
Top	1.6354001
Width	2.1563001
Layout - Dynamic	
Anchors	[atLeft, atTop]
AutoSize	<input type="checkbox"/>
ReprintOnOverflow	<input type="checkbox"/>
Output - File	

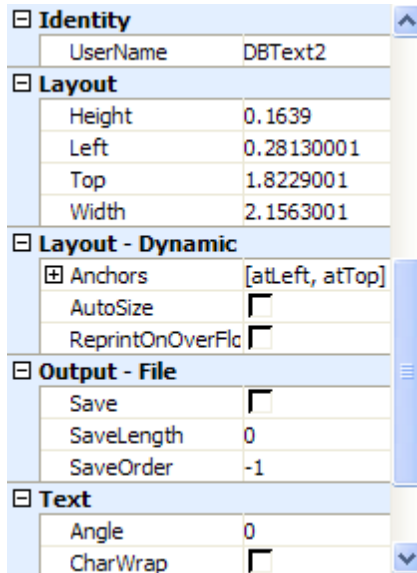
- g. At the top left of the screen click on the right hand drop down list and select Display Address - Advert and on the main toolbar click on the  to centre it.

Properties	Display Address - Advert
------------	--------------------------


- h. Set the font size to 10.

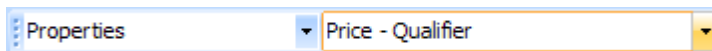


h. Click on the  button and then click just below the field we just added and set the Layout **Height**, **Left**, **Top** and **Width** properties as shown.

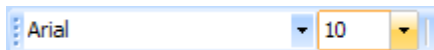


Identity	
UserName	DBText2
Layout	
Height	0.1639
Left	0.28130001
Top	1.8229001
Width	2.1563001
Layout - Dynamic	
⊞ Anchors	[atLeft, atTop]
AutoSize	<input type="checkbox"/>
ReprintOnOverflow	<input type="checkbox"/>
Output - File	
Save	<input type="checkbox"/>
SaveLength	0
SaveOrder	-1
Text	
Angle	0
CharWrap	<input type="checkbox"/>

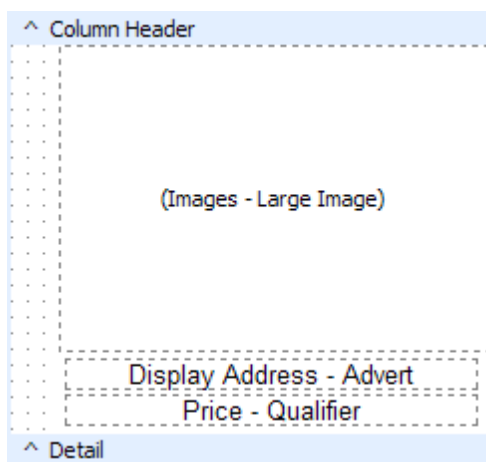
i. At the top left of the screen click on the right hand drop down list and select Price - Qualifier and on the main toolbar click on the  to centre it.



j. Set the font size to 10.



k. This completes the creation of the custom report the detail band should look like this:



^ Column Header

(Images - Large Image)

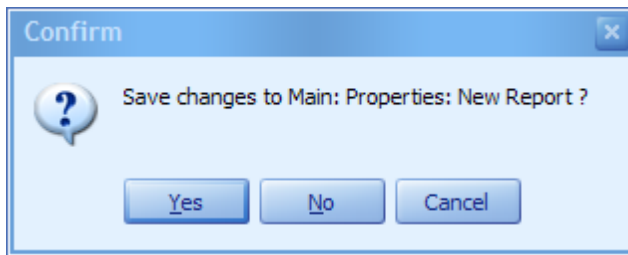
Display Address - Advert

Price - Qualifier

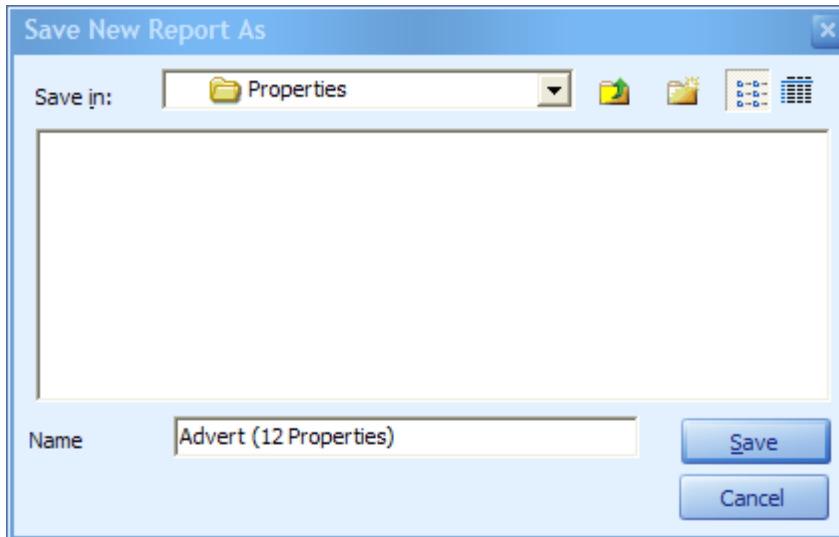
^ Detail

8. SAVE THE CUSTOM REPORT

a. Close the screen. You will be prompted to save the report.



b. Click on the **Yes** button and then enter the name to give to the report and click on the **Save** button.



c. To run this report for all properties use the [Custom Reports Screen](#). To run this report for selected properties use the [Report Generator Screen](#).

3.8 Create a Word template?

EAP previously used Microsoft Word for template creation and generation but, as you are no doubt aware, all versions of Microsoft word are different, in some cases, extremely so. Because of this, and also the slowness of opening Microsoft Word every time, we have now switched to using our own internal editor. This imitates the look of Microsoft Word and there is no loss of functionality. Indeed, the internal format of the documents is compatible with Microsoft Word DOCX and any template can be exported as a Microsoft Word Document.

In this example we will create an A4 single sided document suitable for use as a window or wall card with a logo image, the main image of the property, the price qualifier, the address and the summary details. We will assume that this is for internal printing and will therefore have a margin around it. The finished article we are trying to create will look like this:



OFFERS ABOVE £895,000

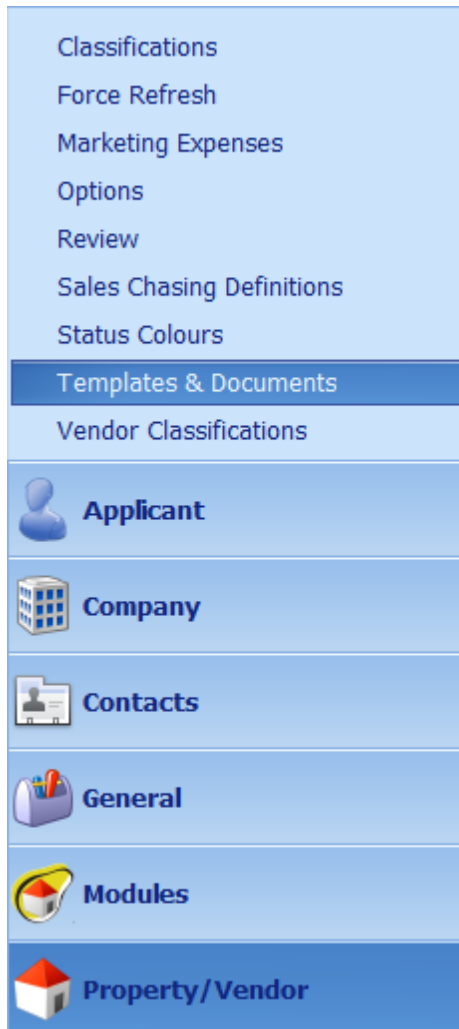
THE OLD BARN, TUNBRIDGE WELLS, KENT, TN2 5HS

A VERY, VERY BEAUTIFUL GRADE II LISTED BARN CONVERSION (C 1750) WITH A WEALTH OF EXPOSED BEAMS. VERY VERSATILE ACCOMMODATION CONSISTING OF 4 BEDROOMS, FOUR RECEPTION ROOMS, THREE BATHROOMS AND A LUXURY FITTED KITCHEN. ½ ACRE LANDSCAPED GARDENS AND A 3½ ACRE PADDOCKS WITH FIELD SHELTER/STABLES. THIS PROPERTY IS LOCATED IN AN AREA DECLARED AS BEING OF OUTSTANDING NATURAL BEAUTY AND IS VERY PRIVATE.

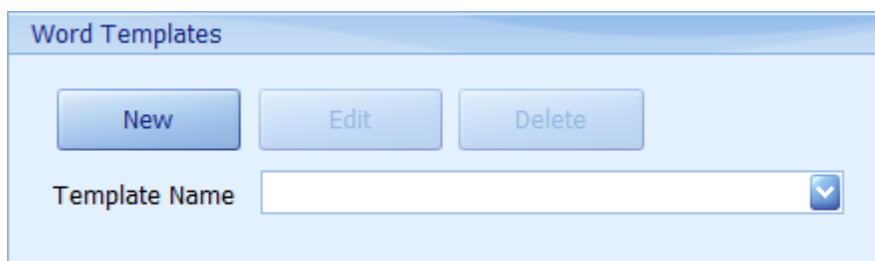
There are 5 steps required to create this template.

1. CREATE A NEW TEMPLATE

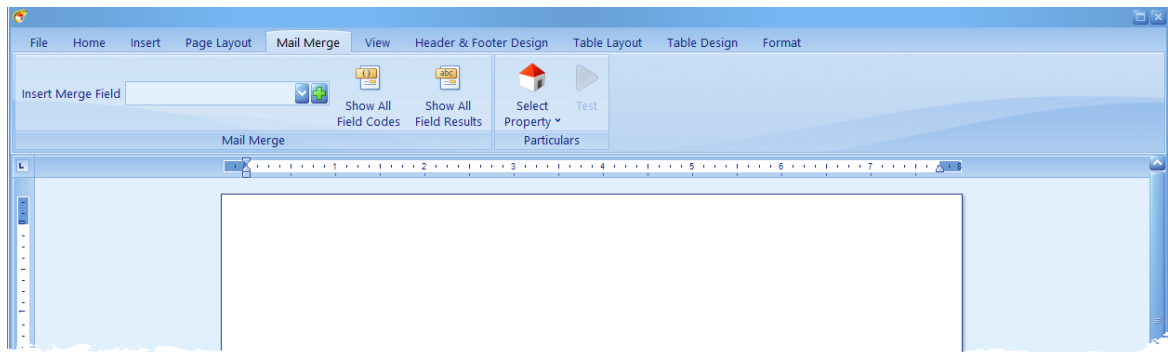
- a. From within [System Administration](#) expand the **Property/Vendor** group and click on the **Templates & Documents** option.



- b. Click on the **New** button in the **Word Templates** panel.

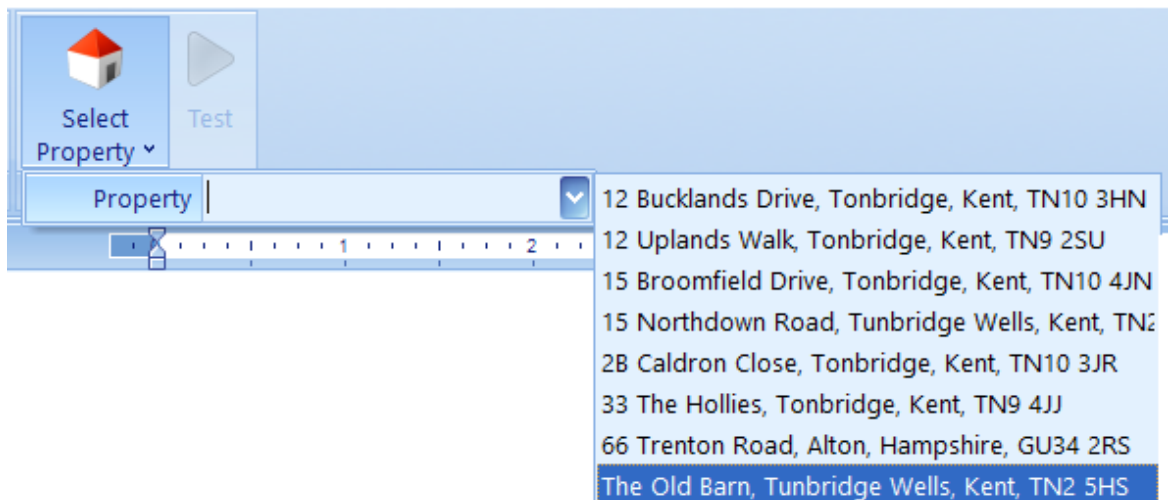


- c. This will open the internal Template Editor..



An A4 portrait document will be created with the margins automatically set to 0.25 inches and you are positioned to the **Mail Merge** tab. If you wish to change the layout you can do so by clicking on the **Page Setup** button on the **File** tab.

Whilst designing sample text is used for the merge fields and a temporary place holder is used for images. At any point in the design process you can generate property particulars from it providing the template is saved. To do this click on the **Select Property** button and select a property from the list. The property list consists of the 10 live properties in your database that have the most images.



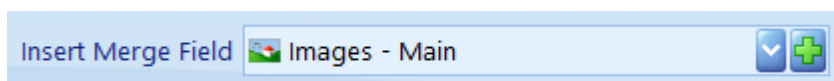
Once you have selected the property the **Test** button will become enabled providing the template has been saved. Clicking on it will generate the particulars in another window. The particulars will not be able to be edited.

2. INSERTING AND FORMATTING A LOGO

Select the **Insert** tab and click on the **Inline Picture** button. A dialog will be displayed for you to select the image you wish to use. The image will automatically position itself to the top of the page.

3. INSERTING THE MAIN IMAGE FROM ESTATE AGENT PRO.

a. Select the Mail Merge tab Using the EAP control panel select **Images - Main** from the drop down list and click on the **+** button on the right. An icon against each merge field indicates what type of field it is.






b. Position and re-size the image using the mouse as required. The height/width ratio should be

proportional to the size of the photographs you use.

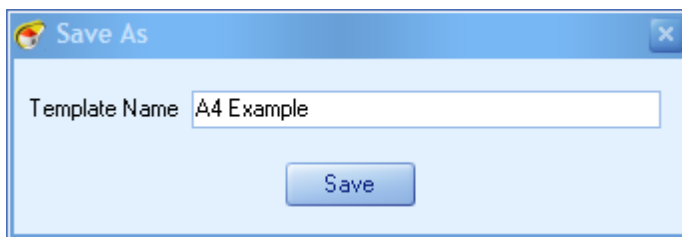
4. INSERTING THE TEXT FIELDS

For a more flexible layout it is recommended that each text field should be inserted into it's own text box. If the layout is more simple this may not be necessary

- a. Select the **Insert** tab and then click on the **Text Box** button. Then position the text box where you want it to be.
- b. Select the **Mail Merge** tab and select Price - Qualifier from the drop down list and click on the  button on the right.
- c. Select the field inserted and change the font to Microsoft Sans Serif, the font size to 20, the style to bold and the paragraph alignment to centered. These buttons are on the **Home** tab.
- d. Carriage return down a line or two and select **Property - Address String** from the drop down list and click on the  button on the right. Set the font, font size, etc as previously detailed.
- e. Carriage return down another line or two and select **Particulars - Summary Details (Plain)** from the drop down list and click on the  button on the right. Set the font, font size, etc as previously detailed. In this case I have selected a font size of 16.


5. SAVE THE TEMPLATE

- a. Click the  **Save Template** button on the **File** tab. This will display the following dialog.



- b. Enter the new template name and click on the Save button. You can now close this screen. This template can now be used for the generation of particulars for any property.

NOTES

-  The **Save Template** button can be used at any point through the design of the template and it is recommended that you do so quite frequently.
When you insert a merge field, other than for any image, they are stored as document variables. These variables can be displayed by clicking on the **Show All Field Codes** button on the **Mail Merge** tab.

3.9 Create a standard letter?

There are three different types of letters. Applicants, vendors and marketing. The creation and use of them is the same.

In this example we are going to create a blank letter that we want to use to communicate with all vendors or a sub-set of them. The final letter will look like this when mail-merged:

1 High Street, Tonbridge, Kent, TN9 1ST,
 Tel: 01892 111111 Fax: 01892 222222
 Email: sales@tonbridgeestateagents.com

16/10/2010


Mr KA Randall
 12 Brick Street
 Westminster
 London
 W13 7XR

Dear Mr Randall

Re: _____

Yours sincerely

Ken Jones
 Manager

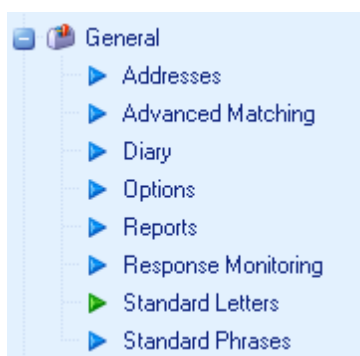
 We could have included a banner image or a signature or many other fields but this example should provide you with the basic skills necessary to create any standard letter.

This standard letter can now be used if you wish to, for example, communicate with any vendor by email and after mail-merging the subject and content of the communication can be completed.

There are 3 steps required to complete this standard letter.

1. CREATE A NEW STANDARD LETTER

- a. From within [System Administration](#) expand the General group and click on the **Standard Letters** option.



- b. The first time that you create a letter you should set the default page settings that you wish to use for all new standard letters. The top margin should take into account whether the letter will be printed on pre-printed stationery or not. You may wish to consider having different letters for emailing as opposed to printing.

Default Page Settings

Font:

Top Margin: Bottom Margin:

Left Margin: Right Margin:

Justification:

c. Click on the button for the type of standard letter you wish to create, in this case **Vendor**.

Edit Standard Letters

d. This will open the standard letters editor displaying all existing vendor letters sorted alphabetically.

Standard Letter Editor - Vendor


Clipboard: Copy, Paste, Cut
Document: Duplicate, Columns: 1, Header & Footer, Thesaurus, Replace
Editing: Select All, Format, Wrap
Insert: Image, Merge Field, Object
Font: Arial, 11, Bold, Italic, Underline
Paragraph: Bulleted List, Numbered List, Indent Left, Indent Right, Decrease Indent, Increase Indent
Table: Create Table

Description	Exclude
Blank Letter	Img, Sig
Confirmation of details	Sig
Exchange	Sig
Fallen - re-market	Sig
Instruction	Sig
Marketing report	Sig
No agreement	Sig
Notice	Sig
Offer - subject to vendor finding	Sig
Offer accepted (awaiting information)	Sig
Offer accepted (subject to sale)	Sig
Offer rejected - (proceedable)	Sig
Offer rejected - (unproceedable)	Sig
Offer to be considered (proceedable)	Sig
Offer to be considered (unproceedable)	Sig
Price change - increase	Sig
Price change - reduction	Sig
Renegotiated	Sig
Response Monitoring	Img, Sig
Sales	Sig
Sales Memo	Img, Sig, Sv
Statement of Account	Sig
24 Letters	

«Today's Date»
«Vendor Name - Full»
«Vendor Address - Block»
«Vendor Name - Greeting»
Re: «Property Address - First Line Plus Town»
«Vendor Solicitor - Address»
Yours Sincerely
«User - Signature»
«Branch - Manager»
Manager
[Visit our website](#)

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Mail merge fields are shown inside «» blocks such as «Vendor Address - Block» and once inserted cannot be changed. They can be deleted.

e. Click on the  button on the navigator panel at the bottom left hand side of the screen. The page layout dialog will be displayed with the default settings which can be changed if necessary. Click on the **OK** button.

Page Layout

Papersize

DIN A4 210 x 297 mm

Width 21.00 cm Height 29.70 cm

Margins

Left 2.54 cm Right 1.27 cm

Top 5.08 cm Bottom 1.91 cm

Header 1.270 cm Footer 1.270 cm

Orientation

☒ Portrait ☐ Landscape

OK Cancel Printer...

f. A new row will be added at the top of the letter list. Click on this and enter the name you wish to use, in this instance **Blank Letter**.



*Descriptions that start with the word **Offer** will be for use in the [Offers Screen](#). Descriptions that start with the word **Viewing** will be specifically for use in the [Viewings Screen](#). This only applies to applicant and vendor letters.*

Description	Exclude	
Blank Letter	Img,Sig	▼
Confirmation of details	Sig	▼
Exchange	Sig	▼
Fallen - re-market	Sig	▼
Instruction	Sig	▼
Marketing report	Sig	▼
No agreement	Sig	▼
Notice	Sig	▼
Offer - subject to vendor finding	Sig	▼
Offer accepted (awaiting information)	Sig	▼
Offer accepted (subject to sale)	Sig	▼
Offer rejected - (proceedable)	Sig	▼
Offer rejected - (unproceedable)	Sig	▼
Offer to be considered (proceedable)	Sig	▼
Offer to be considered (unproceedable)	Sig	▼
Price change - increase	Sig	▼
Price change - reduction	Sig	▼
Renegotiated	Sig	▼
Response Monitoring	Img,Sig	▼
Sales	Sig	▼
Sales Memo	Img,Sig,Sv	▼
Statement of Account	Sig	▼
24 Letters		▼


Options can be excluded by means of the drop down list in the **Exclude** column. These options are

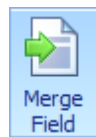
Exclude automatic banner image from emails	If the automatic inclusion of an email logo is turned on in Company Options you may wish to turn this off for certain standard letters that incorporate their own images.
Exclude automatic signature block from emails	If the automatic inclusion of a signature block is turned on in Company Options you may wish to turn this off for certain standard letters that incorporate their own signature block.
Don't save details in client communications	If you are sending out the same letter to hundreds of clients you can exclude the detail from being saved. There will still be a record of it being sent.
Exclude this letter from updating clients review status	By default sending a letter to a client who is an applicant or a vendor automatically updates the client review date. You may wish certain letters such as newsletters to not do this.

These options are not applicable to this example.

2. ADDING THE STANDARD LETTER CONTENT


- Click into the empty standard letter and then click on the  (bold) button in the **Font** toolbar and

then click on the  (centre) button in the **Paragraph** toolbar.



b. Click on the **Merge Field** button in the **Insert** toolbar which will display the list of Estate Agent Pro fields that can be inserted for this type of letter.





c. The first field we wish to use is the **Branch - Address String**. To select this start typing in the word **Branch**. This will take you to the first field that starts with that name. Then either double click the **Branch - Address String** or click on it and then click on the  button. This will insert the field into the standard letter as «Branch - Address String».

d. Press the **Enter** key on your keyboard to insert a line break. Type in **Tel:** and then insert another field called **Branch - Telephone**. Enter a few spaces followed by typing **Fax:** and then insert another field called **Branch - Fax**.

e. Press the **Enter** key on your keyboard to insert a line break. Type in **Email:** and then insert another field called **Branch - Email** and then enter two line breaks. The standard letter should now look like this:

«Branch - Address String»
Tel: «Branch - Telephone» **Fax:** «Branch - Fax»
Email: «Branch - Email»

f. Click on the  (bold) button to turn it off and then click on the  (left align) button. Insert another field called **Today's Date**. The progressive search facility can be used to easily locate it and then enter two more line breaks.

g. Insert the field called **Vendor Name - Full** and enter a line break. Insert the field called **Vendor Address - Block** and enter two more line breaks.

- h. Insert the field called **Vendor Name - Greeting** and enter two more line breaks.
- i. Click on the **B** (bold) button and the **U** (underline) button and type in **Re:** and then turn bold and underline off again.
- j. Insert two more line breaks and type in Yours Sincerely followed by 5 line breaks.
- k. Insert the field called Branch - Manager and enter a line break and type in Manager. The letter should now look like this:

«Branch - Address String»
Tel: «Branch - Telephone» Fax: «Branch - Fax»
Email: «Branch - Email»

«Todays Date»

«Vendor Name - Full»


«Vendor Address - Block»


«Vendor Name - Greeting»

Re:


Yours Sincerely

«Branch - Manager»
Manager

 We could have inserted fields called User - Full Name and User - Title if we wanted the letter to come from the logged in user instead of the manager. Also note that there are merge fields for Primary Applicant/Vendor which can be used when a letter needs to have the primary applicant/vendor's details on it when it is being sent to an additional applicant/vendor.


 If standard letters are to be sent by email you can optionally insert the following text anywhere in the letter to change the default subject of the email {EMAILSUBJECT:Market Your Home Now} including the brackets The default email subject is "Letter from" plus your company name.

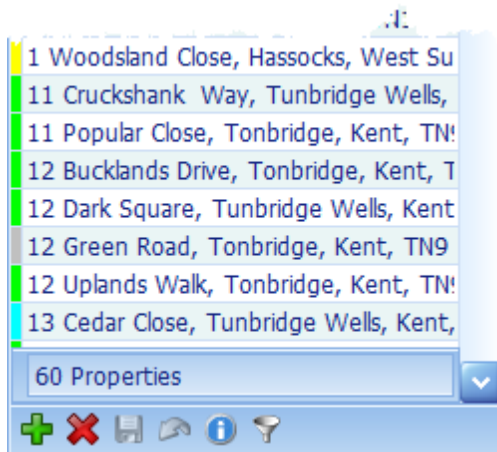
3. SAVE THE STANDARD LETTER


Save the letter by clicking on the  button on the navigator panel. This screen can now be closed and the letter can be used in connection with all vendors.

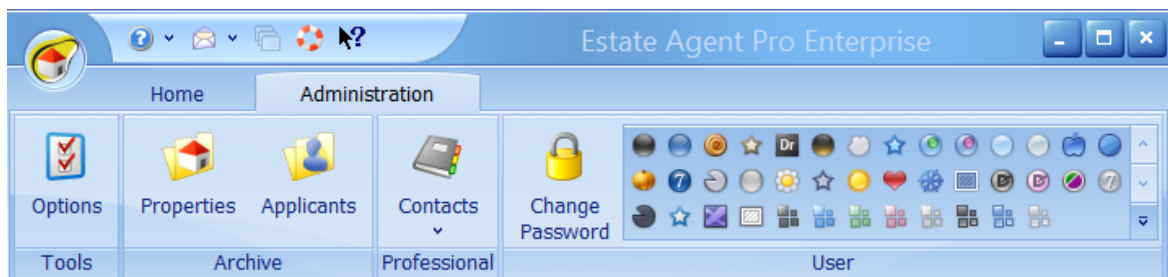
3.10 Delete applicant or property?

To completely delete an Applicant or Property record, the following steps must be taken; please be aware that once deleted, the record can not be undeleted.

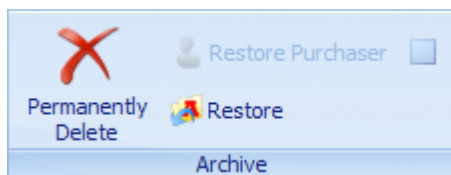
1. First the Applicant or Property has to be Archived, to do this go to the appropriate screen, and click on the  button on the navigation bar.



2. See [How do I use the navigation buttons?](#) for further details. A confirmation dialog will be displayed, click the  **Archive** button.
3. Go to the Administration tab and click on the Properties or Applicants button from the Archive section of the ribbon bar.



4. This will display the archived properties or applicants screen. Select the property or Applicant record that you are going to delete.
5. Click on the 'Permanently Delete' button.



3.11 Filter properties?

The number of properties being viewed can be filtered on in two ways.

STANDARD FILTER

Using the standard filter only the items listed on this tab can be filtered on. Clicking on the button will select all options in that panel. Clicking on the button will unselect all options in that panel.

For example, if you were only interested in 3 bedroomed detached houses that are available you would check the following boxes:

<div> <div>Beds, Baths</div> <div> <div>Bedrooms 3</div> <div>Bathrooms 0</div> <div>Receptions 0</div> <div>Garages 0</div> <div>Filter <input checked="" type="checkbox"/></div> </div> </div>	<p>It is necessary that the Filter <input checked="" type="checkbox"/> checkbox is ticked..</p>
--	---

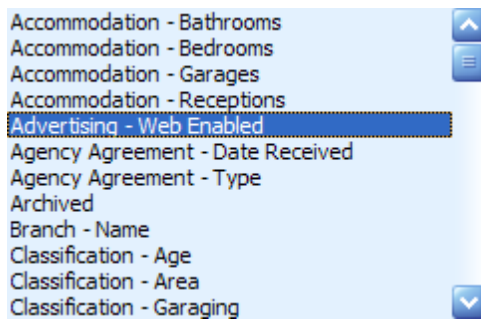
	It is necessary that the Filter <input checked="" type="checkbox"/> checkbox is ticked.

You can then click on the button which will apply the filter to the screen you came from. The grid on the screen that you came from will show the filter information at the bottom of the grid. When you have finished close this screen.

ADVANCED FILTER


The advanced filter will mimic those entries made in the standard filter however, it has the advantage of being able to filter on much more data.


Suppose we want to add one more condition that is not available on the standard filter, for example, is the property web enabled. To do this click on the button to add a new condition. This will add the first alphabetic item that is available, in this instance Accommodation - Bathrooms. Click on that item and then select Advertising -Web Enabled from the drop down list of items that are available for filtering on.



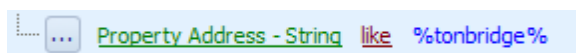
This will then display Advertising - Web Enabled equals <empty>. Click on <empty> and change it to True. The advanced tab will then reflect the additional condition.



You can then click on the  which will apply the filter to the screen you came from. The grid on the screen that you came from will show the filter information at the bottom of the grid. Close the screen when you have finished filtering.



An individual condition can be removed by clicking on the  button next to it.

When the *like* operator is used the search string must use the wild card % at either or both ends, for example:

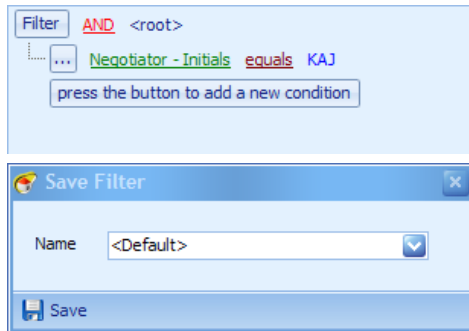




Note the use of the lowercase. *%tonbridge%*, *%Tonbridge%* or *%TONBRIDGE%* will all produce the same results as filters are case insensitive. This will find all properties with Tonbridge in the address. In this case as we are searching the whole address the filter results will of course include street names such as *Tonbridge Road*, *Tunbridge Wells*.


To stop this you could use the field *Property Address - Town* instead.

Advanced filters can be saved and loaded by clicking on the  save or  load buttons respectively. It is possible to set a default filter that will be automatically invoked each time the properties screen is loaded.

Suppose for example that I am a negotiator and I only ever want to be able to see my own properties. To do this set an advanced filter as shown below.



click on the  button to apply the filter then click on the  button to save the filter. The Save Filter dialog shown below will be displayed.

Select <Default> from the drop down list and click on the  save button. From now on when you open the properties screen this filter will be applied automatically.

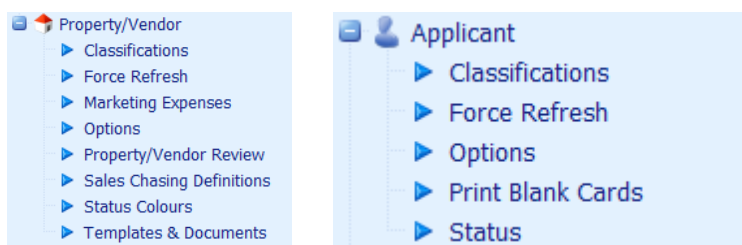


Please note that the filter saved for the properties screen will only be applied to that screen. If you wish to set a default filter for the report generator then that must be done within that screen.

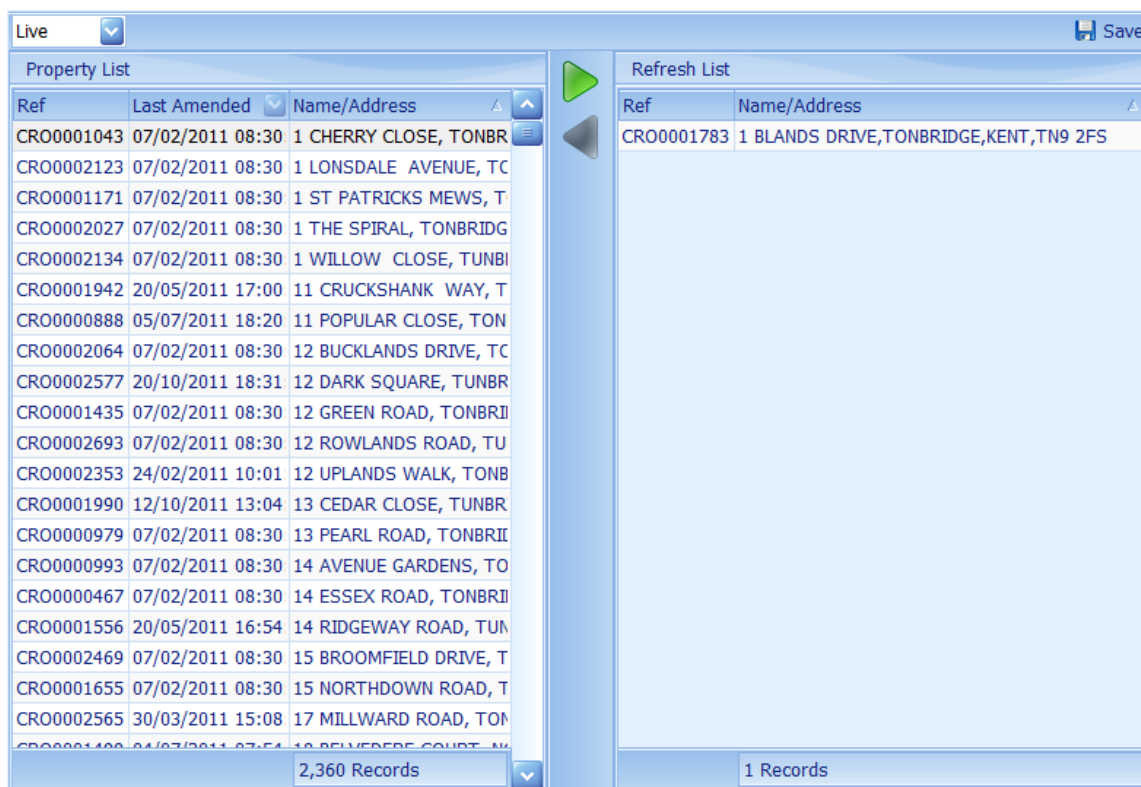
3.12 Force Refresh a property or applicant?

Properties and applicants should only be refreshed when you are requested to do so.

- a. From within [System Administration](#) expand either the Property/Vendor group or the Applicant group and click on the **Force Refresh** option.



- b. A screen will be displayed with two columns embedded within the options screen. The example shown is for a property but the way of doing this for an applicant is identical. Select the property you wish to refresh from the left hand column and then press the button to move it across to the refresh list on the right hand side. Properties can also be dragged and dropped to the refresh list.

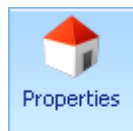


- c. When you have moved all properties you require to refresh to the refresh panel press the save button to process the selection. A confirmation dialog will be displayed indicating how many properties have been refreshed. The upload of the data will automatically commence in the background within 1 minute. The screen can now be closed.

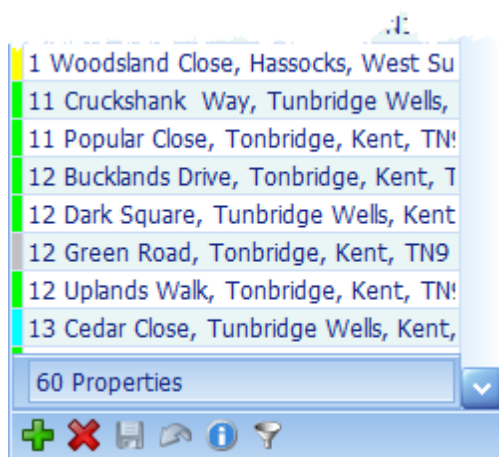
3.13 Make properties uploadable?

Estate Agent Pro automatically validates all data and prompts for any missing data. However, as not all data is mandatory, we have an easy way for you to check that properties are uploadable.



1. On the main screen click on the properties button. This will open the [Properties Screen](#).

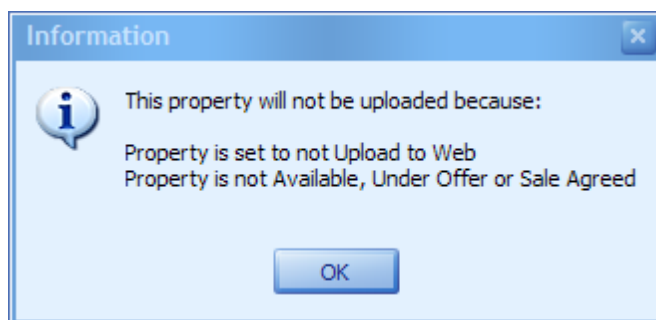


2. Navigate to the applicable property either by clicking on it or using the progressive search facility.



3. Look at the Uploadable button in the Status section of the ribbon bar. It will display one of the following flags:

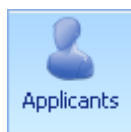
 Uploadable	Nothing prevents this property from being uploaded to your website and portals.
 Uploadable	The property is not uploadable. Clicking on the button will tell you why. An example is shown below.



4. Make changes as appropriate until the uploadable flag changes its colour to green.

3.14 Match applicants to properties?

1. On the main screen click on the applicants button.



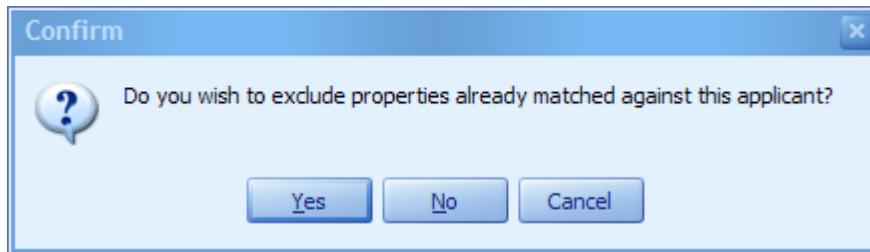
2. Navigate to the applicable applicant either by clicking on them or using the progressive search facility.



3. Click on the match button.



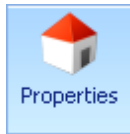
4. You will be asked if you wish to exclude properties already matched. Click on the Yes or No button as appropriate.



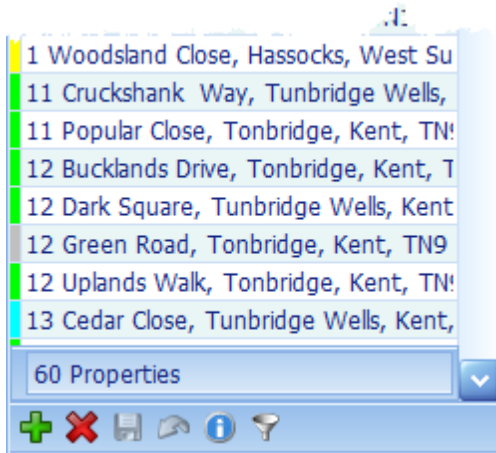
5. After a short delay the [Applicant/Property Matching Screen](#) will be displayed where you can choose to communicate the results of the matching process to the applicant by text, email or letter.

3.15 Match properties to applicants?

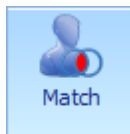
1. On the main screen click on the properties button. This will open the [Properties Screen](#).



2. Navigate to the applicable property either by clicking on it or using the progressive search facility.



3. Click on the Match button.



4. This opens a popup the [Matching Screen](#) asking you if you wish to exclude properties already matched against this applicant.
5. After a short delay the [Applicant/Property Matching Screen](#) will be displayed where you can choose to communicate the results of the matching process to the applicant by text, email or letter.

3.16 Print address labels?

For example, if you want to send a letter to all applicants looking for a property in a specific price band:

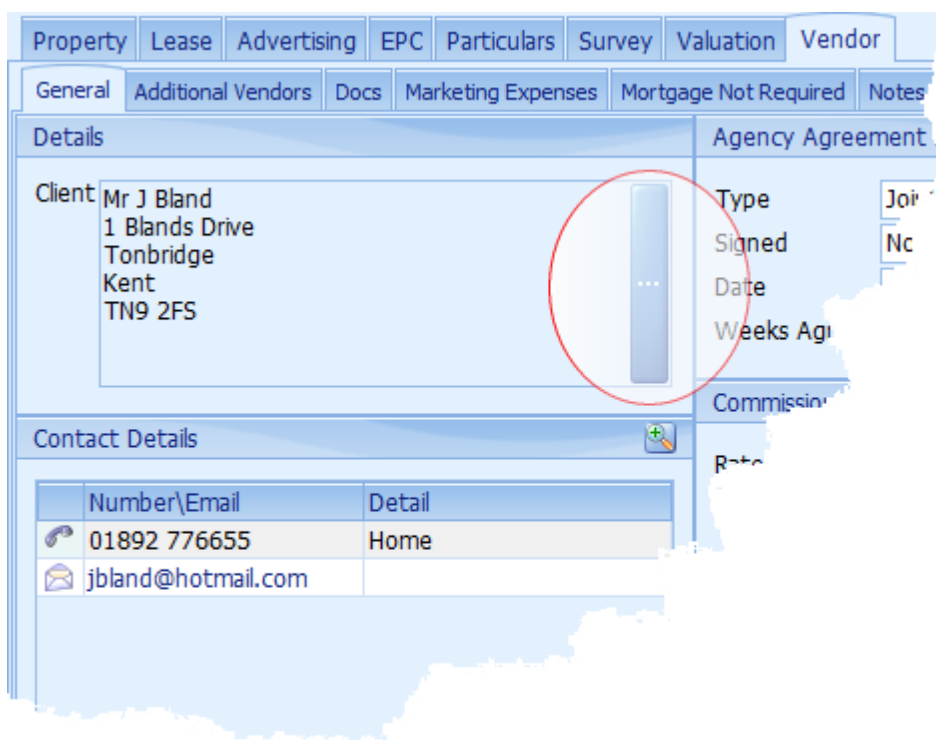
1. Go to [Reports>Generate>Applicant Search](#).
2. Set the filter as required and apply it (see [How do I Filter properties?](#) as an example).
3. Then run [Standard Reports>Address Labels - Applicants](#).

The addresses are formatted to print on:

63 x 38 mm 21 per sheet labels
 Avery Addressing Label 63.5 x 38.1mm J8160
 Viking 63 x 38 mm VIJL21

3.17 Update an Applicant/Vendor?

To update a client record please go to the vendor (or applicant or landlord) screen and click on the vertical blue button with no text on it that appears to the right of the box with the client's name and address in it.



3.18 Use grid column grouping and filtering?

Any column that makes logical sense to group by, can be grouped. We will use the [Activity Report Screen](#) as an example.

Activity Report

From: 01/01/2015 To: 06/10/2015

Report

Activity Report

Drag a column header here to group by that column

Date	Property	Branch	Type	Activity	Price	Fee	Neg	Valuer
06/01/2015	The Old Barn, Tunbridge Wells, Kent, TN2 5HS	Crowborough	Sale	Offer Rejected	£850,000		KC	MMJH
08/01/2015	1 Blands Drive, Tonbridge, Kent, TN9 2FS	Tonbridge	Sale	Valuation	£0		MMJH	KC
09/01/2015	1 Blands Drive, Tonbridge, Kent, TN9 2FS	Tonbridge	Sale	Valuation	£0		MMJH	KC
28/01/2015	The Old Barn, Tunbridge Wells, Kent, TN2 5HS	Crowborough	Sale	Offer Withdrawn	£870,000		KC	MMJH
15/02/2015	The Old Barn, Tunbridge Wells, Kent, TN2 5HS	Crowborough	Sale	Sale Agreed	£875,000	£16,625	KC	MMJH
22/02/2015	1 Blands Drive, Tonbridge, Kent, TN9 2FS	Tonbridge	Sale	Price Change	£229,990	£4,600	MMJH	KC
22/02/2015	1 Blands Drive, Tonbridge, Kent, TN9 2FS	Tonbridge	Sale	Under Offer	£200,000	£4,000	MMJH	KC
22/02/2015	1 Blands Drive, Tonbridge, Kent, TN9 2FS	Tonbridge	Sale	Sale Agreed	£210,000	£4,200	MMJH	KC
25/02/2015	1 Blands Drive, Tonbridge, Kent, TN9 2FS	Tonbridge	Sale	Price Change	£229,990	£4,600	MMJH	KC
17/03/2015	Flat 2, 125 West Street, Tunbridge Wells, Kent, TN2 3AH	Tonbridge	Rent	Sale Agreed	£850	£17	KC	
19/03/2015	11 Cruckshank Way, Tunbridge Wells, Kent, TN2 4RW	Tonbridge	Sale	Valuation	£250,000		KC	MMJH
19/03/2015	1 Blands Drive, Tonbridge, Kent, TN9 2FS	Tonbridge	Sale	Instruction	£229,990	£4,600	MMJH	KC
24/03/2015	The Old Barn, Tunbridge Wells, Kent, TN2 5HS	Crowborough	Sale	Price Change	£895,000	£13,425	KC	MMJH
24/03/2015	1 Blands Drive, Tonbridge, Kent, TN9 2FS	Tonbridge	Sale	Fee Changed	£229,990	£2,300	MMJH	KC
24/03/2015	1 Blands Drive, Tonbridge, Kent, TN9 2FS	Tonbridge	Sale	Fee Changed	£229,990	£4,600	MMJH	KC
06/04/2015	The Old Barn, Tunbridge Wells, Kent, TN2 5HS	Crowborough	Sale	Under Offer	£850,000	£12,750	KC	MMJH
06/04/2015	The Old Barn, Tunbridge Wells, Kent, TN2 5HS	Crowborough	Sale	Sale Agreed	£875,000	£13,125	KC	MMJH
22/04/2015	1 Cherry Close, Tonbridge, Kent, TN10 2EF	Tonbridge	Sale	Sale Agreed	£325,000	£6,500	KC	MMJH
22/04/2015	11 Brick Street, Westminster, London, W13 7XR	Tonbridge	Sale	Sale Agreed	£900,000	£13,500	CE	
22/04/2015	11 Brick Street, Westminster, London, W13 7XR	Tonbridge	Sale	Fee Changed	£1,000,000	£19,000	CE	
26/04/2015	The Old Barn, Tunbridge Wells, Kent, TN2 5HS	Crowborough	Sale	Fee Changed	£895,000	£17,005	KC	MMJH
01/09/2015	13 Cedar Close, Tunbridge Wells, Kent, TN1 2AB	Tonbridge	Sale	Exchange	£132,000	£2,640	AD	MMJH
04/10/2015	18 Belvedere Court, North Avenue, Tonbridge, Kent, TN9 1	Tonbridge	Sale	Under Offer	£100,000	£2,000	AD	RR

23 Properties

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If, for example, you wish to show this grid grouped by your branches, right mouse click on the Branch column heading and then drag it to the grouping area and release the mouse button.

Branch

Date	Property	Activity	Price	Fee
+ Branch : Crowborough				
- Branch : Tonbridge				
17/08/2010	1 Ethelred Gardens, Tonbridge, Kent, ME19 1	Valuation	£229,995	
24/08/2010	14 Avenue Gardens, Tonbridge, Kent, ME19 3B	Valuation	£324,995	
26/08/2010	1 Blands Drive, Tonbridge, Kent, ME19 2JS	Price Change	£229,995	
26/08/2010	1 Ethelred Gardens, Tonbridge, Kent, ME19 1	Price Change	£229,995	
26/08/2010	14 Ridgeway Road, Tunbridge Wells, Kent, TN	Sale Agreed	£180,000	£3,600
26/08/2010	1 Blands Drive, Tonbridge, Kent, ME19 2JS	Price Change	£229,995	
26/08/2010	1 Ethelred Gardens, Tonbridge, Kent, ME19 1	Price Change	£229,995	
27/08/2010	8 Journeys End, Tonbridge, Kent, TN9 2JR	Under Offer	£160,000	£3,200
31/08/2010	8 Journeys End, Tonbridge, Kent, TN10 4NG	Sale Agreed	£170,000	£3,400
06/09/2010	1 Cherry Close, Tonbridge, Kent, TN10 2EF	Instruction	£0	
10 Properties				
14 Properties				

The column grouped by can then be collapsed or expanded as required e.g. Crowborough branch is collapsed.


We could, if we so wished group by Date, in this instance this particular grid has been set to group by months:

Date	Branch	Property	Activity	Price	Fee
+ Date : August 2010					
- Date : September 2010					
	Crowborough	The Old Barn,Tunbridge Wells,Kent,TN4 0H	Under Offer	£850,000	£16,150
	Crowborough	The Old Barn,Tunbridge Wells,Kent,TN4 0H	Sale Agreed	£875,000	£16,625
	Tonbridge	1 Cherry Close,Tonbridge,Kent,TN10 2EF	Instruction	£0	
	3 Properties				
	14 Properties				

If you so wished to do so you could group by multiple columns!

Columns can be ungrouped by dragging and dropping them back to their original, or other, column position.

If the grid is printed the grouping used will be reflected in the output.

Filters can be applied to certain columns by clicking on the  button in the column heading. Only those columns that can be filtered will have this button.

If you wish to filter by the Branch column, clicking on the button will display the following drop down list to choose from:

☐ (All)
☐ (None)
☒ Crowborough
☐ Tonbridge

Checking the Crowborough branch will display the properties for just that branch. Multiple branches can be included as appropriate.

Drag a column header here to group by that column

Date	Branch	Property	Activity	Price	Fee
27/08/2010	Crowborough	The Old Barn,Tunbridge Wells,Kent,TN2 5H	Valuation	£895,000	
31/08/2010	Crowborough	The Old Barn,Tunbridge Wells,Kent,TN2 5H	Instruction	£0	
05/09/2010	Crowborough	The Old Barn,Tunbridge Wells,Kent,TN4 0H	Under Offer	£850,000	£16,150
05/09/2010	Crowborough	The Old Barn,Tunbridge Wells,Kent,TN4 0H	Sale Agreed	£875,000	£16,625
		4 Properties			
<input checked="" type="checkbox"/>	(Branch = Crowborough)		<input type="checkbox"/>		

As can be seen from the above example the active filter is displayed at the bottom of the grid.

Multiple column filters can be applied if required.
























To cancel the filter, simply click on the  shown against it.














Of course, column grouping and filtering can be combined!

3.19 Use the contact details grid?

All contact information is displayed for the client. There are two different versions of this grid depending on where it is displayed. The full version which is shown where it is necessary to include the contact details of solicitors is shown first.

Contact Details				
	Whom	Number/Email	Detail	
	Primary	020 7491 7777	Home	
	Primary	01892 525448	Work	
	Primary	07872 123456	Ken Randall	
	Primary	ken@pairsoftwhere.com	Ken Randall	
	Solicitor	01892 121212	J Badger	
	Solicitor	jbadger@badgersolicitors.	Badger	
	Additional	01892 565656	Elaine Randall	
	Additional	07877 888888	Elaine Randall	
	Primary	01892 222444	Home	
	Primary	mariaslove@hotmail.com	Clevedon	
	Solicitor	01892 777777	Mercantile	
	Solicitor	kmercantile@mercantilear	Mercantile	
	Additional	01892 222444	Home	
	Additional	mariaslove@hotmail.com	Jennifer Clevedon	

The abbreviated version is shown where it is only necessary to show only the vendor or applicant contact details.





Contact Details			
	Number\Email	Detail	
	01892 565656	Elaine Randall	
	07877 888888	Elaine Randall	
	020 7491 7777	Home	
	01892 525448	Work	
	07872 123456	Ken Randall	
	ken@pairsoftwhere.com	Ken Randall	

Depending on the positioning of the contact details a splitter item may be available











If it is available, as in the first example above, it can be dragged down to increase the size of the contact details box.


If both applicant and vendor details are to be shown then the first column will indicate who they are:

-  Primary vendor
-  Additional (secondary) vendor
-  Primary applicant
-  Additional (secondary) applicant

The means of contact is also shown graphically and can be either:













-  Land line phone
-  Mobile phone
-  Fax
-  Email
-  Pager
-  DX
-  Website



Clicking on the  button will open a screen to enable you to send text messages to the mobile shown. This has to be configured and additional charges apply.

Clicking on the  button will open a screen enabling you to send an email to the email address specified.

Both of these types of communication will be stored under Draft & Sent Communications for the respective client. See [Customer Communications Screen](#) for more information.

The detail column will show whatever information you have entered into the detail column when the contact details were added on the [Client's Screen](#). If this is blank then the clients first name and surname will be displayed.


The  column represents restrictions on when the client can be contacted. Client contact details can be defined in the [Client's Screen](#) with a time to contact them. These times are fixed and are shown wherever contact details are displayed in Estate Agent Pro. Images are used for this purpose and are as follows  morning only,  afternoon only,  day time only,  evening only,  no limit and  other (the details of which should be specified in the notes). If the Pref(ferred) communications method has been set in the Client's screen then the images will be shown as , , ,  and  respectively. The setting of a contact time can be made mandatory for mobile and telephone numbers by your system administrator in Admin>General Options>Client - Validate Preferred Contact Time.


 if the header with the  button is visible double clicking on it will undock this panel making it larger for ease of use.

3.20 Use the navigation buttons?


One or more of these buttons is used on the navigation bar





To add a new record click on the  button.


To save changes made click on the  button.


To cancel any changes made click on the .


If the information  button is displayed clicking on it will provide info on the meaning of colours used.


If the filter  button is displayed clicking on it will open a screen allowing you to filter the contents of the grid

If the diary  button is displayed clicking on it will add the contents of the dated note into the diary using the date of the note.

If the to do  button is displayed clicking on it will add the contents of the dated note into the to do list using the date of the note.

If the  button is displayed clicking on it will copy the selected vendor dated note to the associated applicants dated notes.

If the  button is displayed clicking on it will copy the selected applicant dated note to the associated vendors dated notes.

If the  button is displayed it will open an associated editor.

To delete (or archive if applicable) click on the  button (this button is normally displayed on the far right of the panel to avoid accidents)

3.21 Use the postcode lookup?

If you have AFD Software's postcode look-up software [Postcode Plus](#) installed on the PC you are using, you will be able to use the postcode search capabilities. Please note that only the Plus version will work with the 64 bit version of EAP.

There are two different ways of searching for addresses:

1. Search by postcode. The postcode field is focused by default so you can immediately start entering the postcode, there is no need to use the Caps Lock key on your keyboard. When the system detects that you have entered a valid postcode it will automatically lookup the address. If you wish to search on a partial postcode you will need to click the Search button.
2. If you don't know the postcode you can still search on any part of the address by entering the address info you do have, select the General Search option and then click on the Search button. Be as specific as possible as this could return lots of addresses otherwise. Results are limited to 1,000 addresses.

Select the correct address from the list (progressive key searching can be used) and then click on the to save the address and exit.

3.22 Use price qualifiers (POA,OIRO. etc...)?

Most property portals can display standard price qualifiers and also, your own website can do this if it is being fed from EAP and is set up to use them.

Price Qualifiers are entered in the property's 'Price Details' field, which is found on the [Properties Screen>Property Tab](#) in the 'Basic Information' section.

EAP will automatically add the 'Asking Price' to the end of any entry in this field unless told not to, using the special codes <PRICE> or <NOPRICE>.

For example using a property with an asking price of £250,000, the table below shows how you can effect the price's appearance on a portal or website:

Price Details entered in EAP	Price displayed on the portal or website
OIRO	OIRO £250,000
Offers in Excess of	Offers in Excess of £250,000
Prices from £225,000 to	Prices from £225,000 to £250,000
Price on Application <NOPRICE>	Price on Application
Prices from <PRICE> to £275,000	Prices from £250,000 to £275,000

Price qualifiers recognised by the portals are:

1. POA
2. Guide Price
3. Fixed Price
4. Offers in Excess of
5. OIRO
6. Sale by Tender

NB: Price qualifiers can also be displayed in your templates and reports, if they are set up to use the appropriate merge fields.

We set the Rightmove Price Qualifier based on the following case-insensitive entries in the Price Details field:

1. POA or Price on Application (Also set if Asking Price = £0) - Appears on Rightmove as POA.
2. Guide Price - Appears on Rightmove as Guide Price.
3. Fixed Price - Appears on Rightmove as Fixed Price.
4. OIRO or Excess - Appears on Rightmove as Offers in Excess of.
5. OIRO or Offers Invited - Appears on Rightmove as OIRO.
6. Tender - Appears on Rightmove as Sale by Tender.
7. From - Appears on Rightmove as From £(propertyasking price).
8. Shared Ownership - Appears on Rightmove as Shared Ownership.
9. Offers Over - Appears on Rightmove as Offers Over £(propertyasking price).
10. Part Buy/Rent - Appears on Rightmove as Part Buy/Rent.

Most portals and 3rd party websites now use the Rightmove V3.5 spec so this also applies to them.

ESTATE AGENT PRO

Part

IV

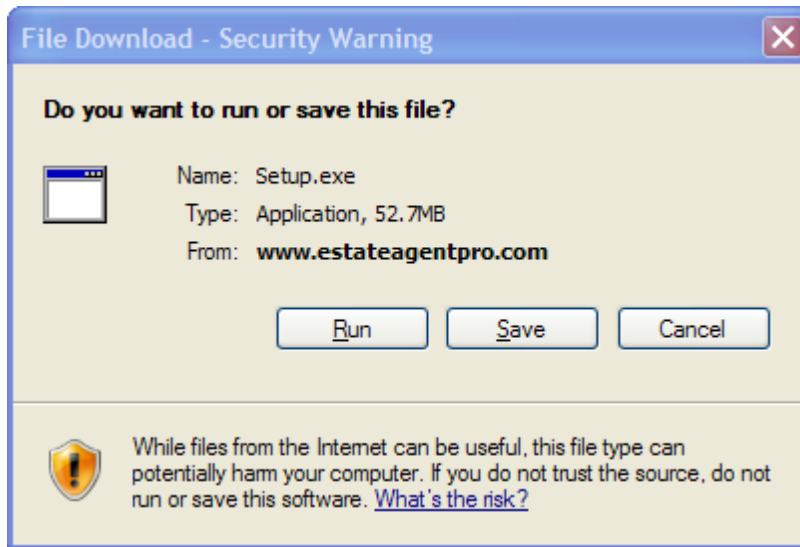
Installing Estate Agent Pro

4 Installing Estate Agent Pro

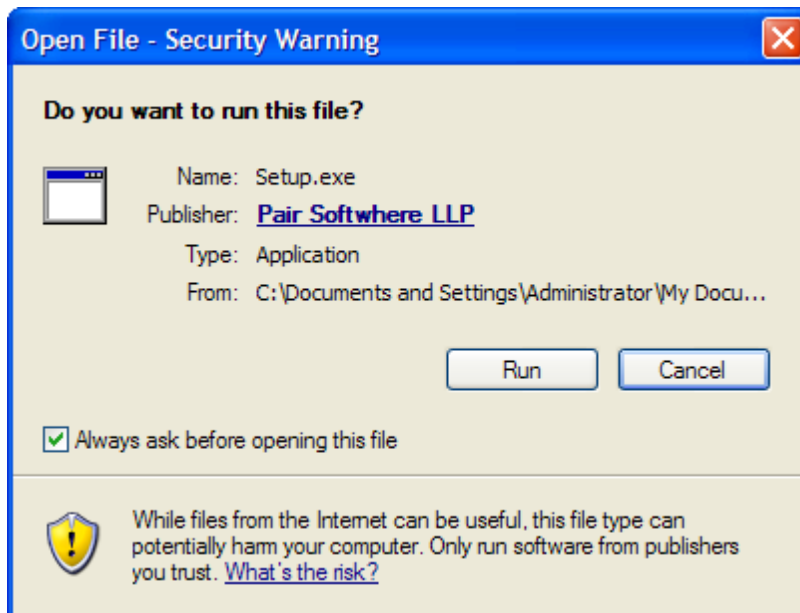
The single user trial version of Estate Agent Pro Enterprise can be downloaded from our website. If you subsequently wish to purchase EAP we will upgrade your system to the multi-user version. The instructions shown are for installing EAP on a PC running Microsoft Windows 7. The installation is in three stages.

STAGE 1 - DOWNLOAD

1. Download The trial version of Estate Agent Pro Enterprise from [here](#). The screens shown will vary according to the browser you are using.



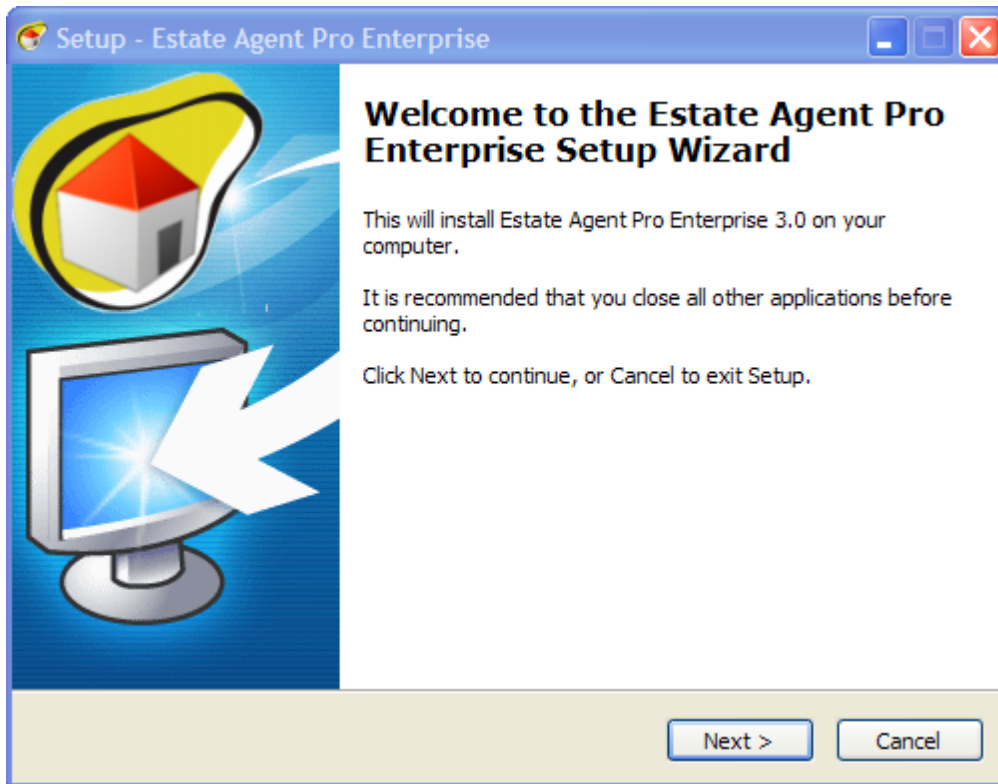
2. Click on the **Run** button. Once the download has finished the following dialog will be displayed.



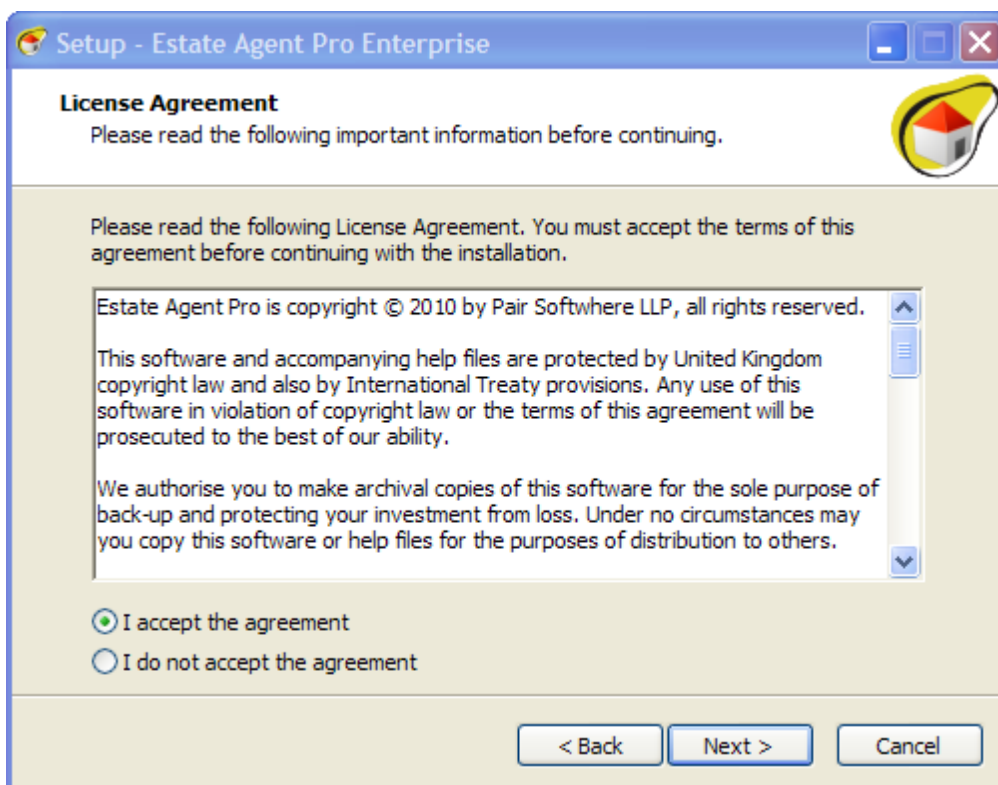
3. All of our executables are signed with a security certificate so that you can be sure that they came from us. Click on the **Run** button. This completes the first Stage.

STAGE 2 - INSTALL

1. Click on the **Yes** button to allow EAP to be installed on your PC. The first screen of our installation program will be displayed.

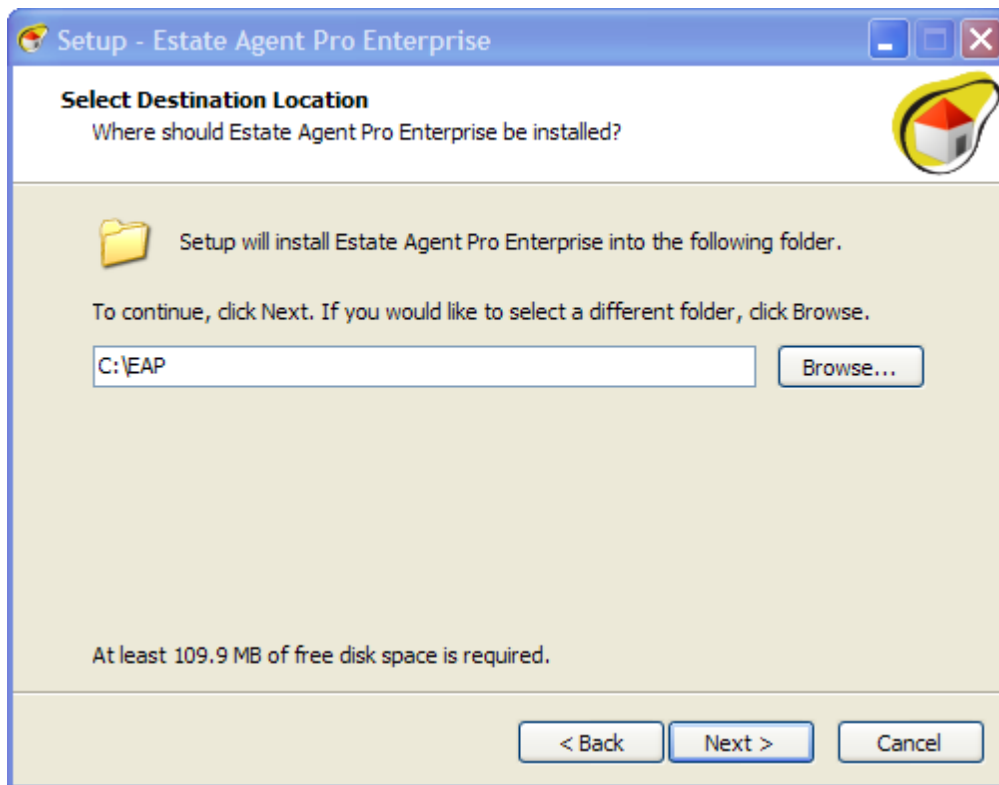


2. We recommend that you close all other applications before continuing. When you have done so click on the **Next** button which will display the licence agreement.



3. Click on the **I accept the agreement** radio button and then click on the **Next** button to proceed

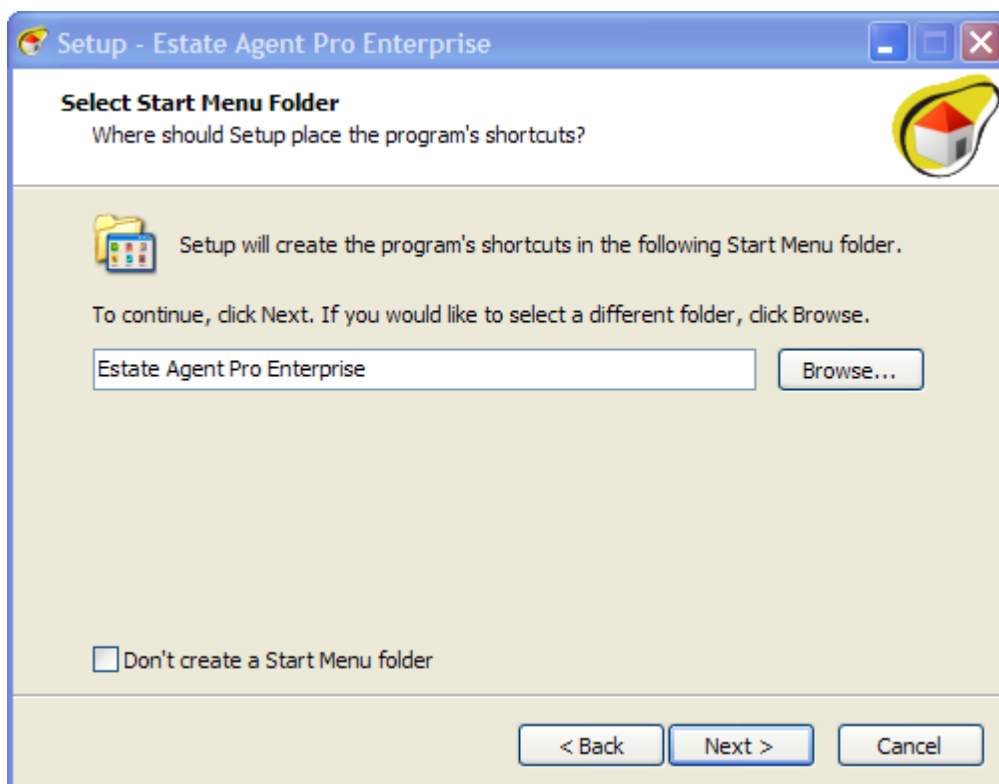
with the installation.



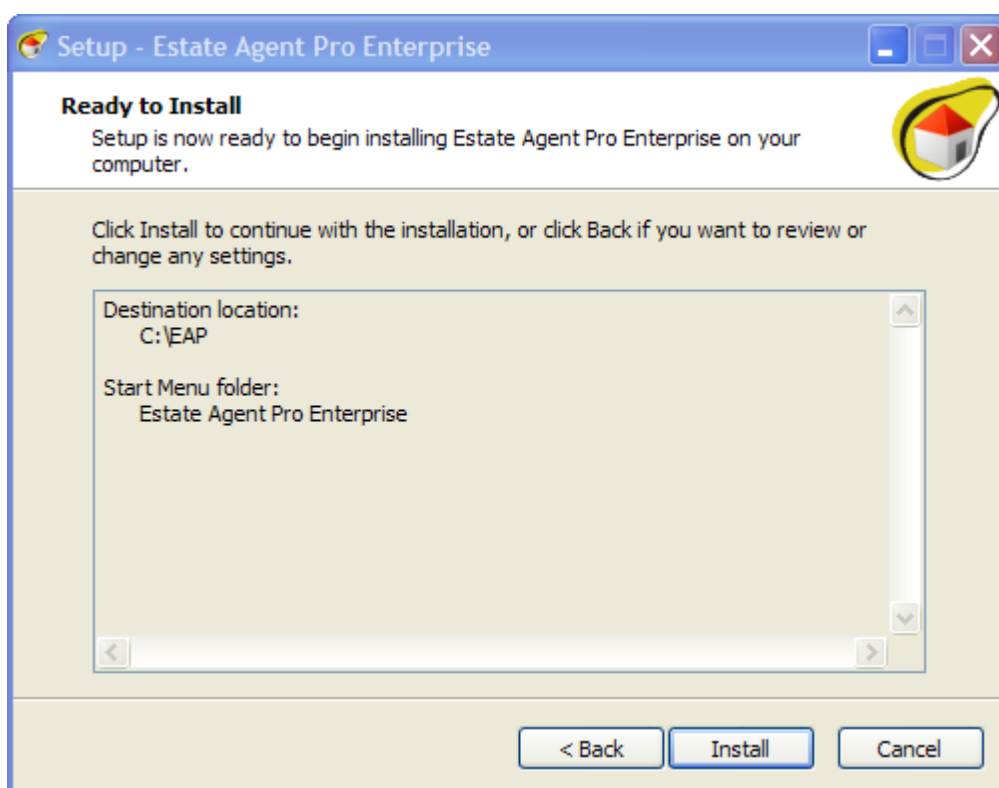
4. By default EAP installs to the C:\EAP directory. If you wish to change this click on the **Browse...** button. Click on the **Next** button to proceed with the installation.



Do not install EAP into protected directories such as Program Files, Program Data, My Documents, etc.



5. It is recommended that you do not change any settings on this screen. Click on the **Next** button to display the confirmation screen.



6. Click on the Install button to install EAP. A progress bar will be displayed as files are copied to the EAP directory. The following screen will be displayed as EAP creates your database.



7. When it completes running **Click to Continue** as indicated.

This completes the second stage of the installation.

STAGE 3 - CONFIGURE

This is the configuration of EAP and will occur the first time Estate Agent Pro is run. The following shortcut will have been placed on your desktop.



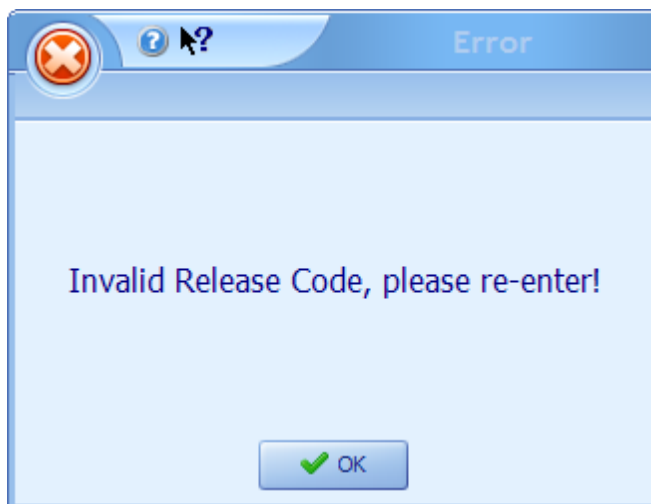
1. Double click on the EAP shortcut which will display the registration screen. The trial installation is valid for two weeks and will display the following dialog each time it is run:



2. You must click on the "I Agree" button in order to continue. Once the two week trial has expired the following Registration screen will be displayed.



Once you have purchased the software you will be requested by EAP technical support to send us the ID displayed, in this case **F47FA179**. The easiest way to do this is to click on the Email link support@estateagentpro.com. You will be emailed back a release code which you should insert in the **Enter Code** box. You will need to confirm that you have read the [EAP Technical Specification](#) before you can click on the **Register Software** button. If the release code entered is incorrect or the expiry date encrypted in the release code has been reached the following dialog will be displayed.



Click on the **OK** button to proceed. If the release code is incorrect you will be given another opportunity to enter it.

3. The Company Info screen will be displayed next.



A dialog box titled "Company Info" with a question mark icon and a close button. It contains several text input fields for company details. The fields are: Company Name (Tonbridge Estate Agents), Branch Name (Tonbridge), Address (1 High Street, Tonbridge, Kent, TN9 1ST), Telephone No (01892 111111), Fax No (01892 222222), and Email (sales@tonbridgeestateagents.com). A "Continue" button is at the bottom.

Company Name	Tonbridge Estate Agents
Branch Name	Tonbridge
Address	1 High Street Tonbridge Kent TN9 1ST
Telephone No	01892 111111
Fax No	01892 222222
Email	sales@tonbridgeestateagents.com

Continue

4. Enter the information requested and then click on the **Continue** button. The registration is now complete.



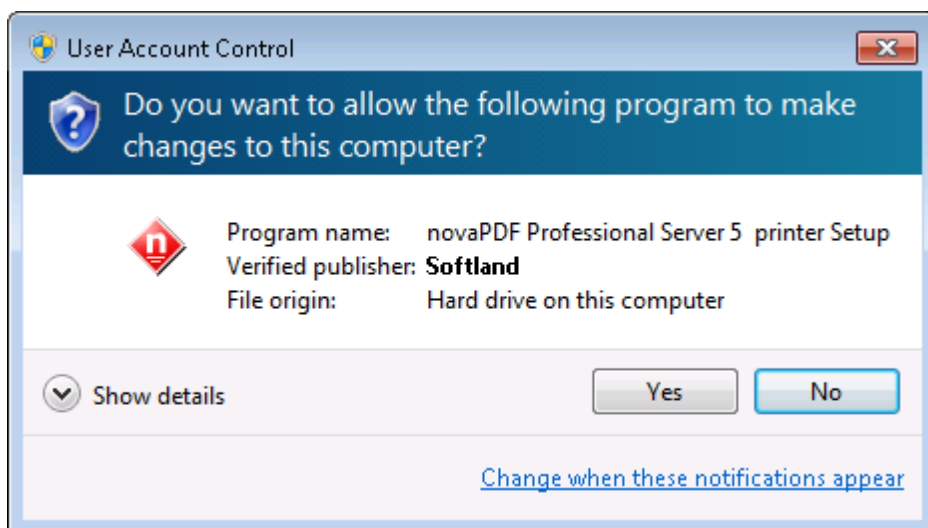
You should use the town you are located in for the branch name.

5. The EAP PDF Printer drivers will then be installed a dialog box will be displayed showing the progress.

The EAP PDF Printer drivers are being installed. This will only happen the first time you run Estate Agent Pro.

The installation could take several minutes. Please wait until this message disappears.

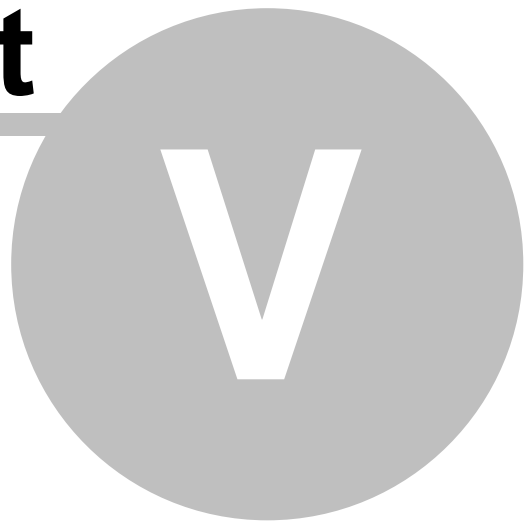
6. You will be asked to confirm that you will allow these drivers to be installed. Please click on the **Yes** button.



This completes the third stage and the installation of EAP. Please ensure that you study this help file for further information on how to use EAP. A good starting point is the [How do I...](#) section and [Frequently Asked Questions](#).

ESTATE AGENT PRO

Part



Screens

5 Screens

Help is available on the following list of screens:

- [Activity Report Screen](#)
- [Advertisements Screen](#)
- [Applicants Screen](#)
- [Applicant/Property Matching Screen](#)
- [Client Review Screen](#)
- [Client's Screen](#)
- [Carousel Screen](#)
- [Chain Flow Screen](#)
- [Communications Screen](#)
- [Contacts Screen](#)
- [Custom Reports Screen](#)
- [Customer Communications Screen](#)
- [Dashboard Screen](#)
- [Diary Screen](#)
- [Event History Screen](#)
- [Google Map Screen](#)
- [Images Screen](#)
- [Letting's Screen](#)
- [Letting's Income/Expenditure Screen](#)
- [Main Screen](#)
- [Marketing Screen](#)
- [Matches Review Screen](#)
- [Offer Book Screen](#)
- [Offers Screen](#)
- [Portfolio Screen](#)
- [Properties Screen](#)
- [Property Review Screen](#)
- [Report Generator Screen](#)
- [Sales/Rent Status Screen](#)
- [Solicitor Referrals Screen](#)
- [Support Screen](#)
- [Valuation Report Screen](#)
- [Viewing Book Screen](#)
- [Viewings Screen](#)
- [YTD Statistics Screen](#)

5.1 Activity Report Screen


The activity report screen lists all activities on all properties within a selected date range (default 30 days). Double clicking on an individual property will open the properties screen focused to the respective property.

Date	Property	Branch	Type	Activity	Price	Fee	Neg	Valuer
06/01/2015	The Old Barn, Tunbridge Wells, Kent, TN2 5HS	Crowborough	Sale	Offer Rejected	£850,000		KC	MMJH
08/01/2015	1 Blands Drive, Tonbridge, Kent, TN9 2FS	Tonbridge	Sale	Valuation	£0		MMJH	KC
09/01/2015	1 Blands Drive, Tonbridge, Kent, TN9 2FS	Tonbridge	Sale	Valuation	£0		MMJH	KC
28/01/2015	The Old Barn, Tunbridge Wells, Kent, TN2 5HS	Crowborough	Sale	Offer Withdrawn	£870,000		KC	MMJH
15/02/2015	The Old Barn, Tunbridge Wells, Kent, TN2 5HS	Crowborough	Sale	Sale Agreed	£875,000	£16,625	KC	MMJH
22/02/2015	1 Blands Drive, Tonbridge, Kent, TN9 2FS	Tonbridge	Sale	Price Change	£229,990	£4,600	MMJH	KC
22/02/2015	1 Blands Drive, Tonbridge, Kent, TN9 2FS	Tonbridge	Sale	Under Offer	£200,000	£4,000	MMJH	KC
22/02/2015	1 Blands Drive, Tonbridge, Kent, TN9 2FS	Tonbridge	Sale	Sale Agreed	£210,000	£4,200	MMJH	KC
25/02/2015	1 Blands Drive, Tonbridge, Kent, TN9 2FS	Tonbridge	Sale	Price Change	£229,990	£4,600	MMJH	KC
17/03/2015	Flat 2, 125 West Street, Tunbridge Wells, Kent, TN2 3AH	Tonbridge	Rent	Sale Agreed	£850	£17	KC	
19/03/2015	11 Cruckshank Way, Tunbridge Wells, Kent, TN2 4RW	Tonbridge	Sale	Valuation	£250,000		KC	MMJH
19/03/2015	1 Blands Drive, Tonbridge, Kent, TN9 2FS	Tonbridge	Sale	Instruction	£229,990	£4,600	MMJH	KC
24/03/2015	The Old Barn, Tunbridge Wells, Kent, TN2 5HS	Crowborough	Sale	Price Change	£895,000	£13,425	KC	MMJH
24/03/2015	1 Blands Drive, Tonbridge, Kent, TN9 2FS	Tonbridge	Sale	Fee Changed	£229,990	£2,300	MMJH	KC
24/03/2015	1 Blands Drive, Tonbridge, Kent, TN9 2FS	Tonbridge	Sale	Fee Changed	£229,990	£4,600	MMJH	KC
06/04/2015	The Old Barn, Tunbridge Wells, Kent, TN2 5HS	Crowborough	Sale	Under Offer	£850,000	£12,750	KC	MMJH
06/04/2015	The Old Barn, Tunbridge Wells, Kent, TN2 5HS	Crowborough	Sale	Sale Agreed	£875,000	£13,125	KC	MMJH
22/04/2015	1 Cherry Close, Tonbridge, Kent, TN10 2EF	Tonbridge	Sale	Sale Agreed	£325,000	£6,500	KC	MMJH
22/04/2015	11 Brick Street, Westminster, London, W13 7XR	Tonbridge	Sale	Sale Agreed	£900,000	£13,500	CE	
22/04/2015	11 Brick Street, Westminster, London, W13 7XR	Tonbridge	Sale	Fee Changed	£1,000,000	£19,000	CE	
26/04/2015	The Old Barn, Tunbridge Wells, Kent, TN2 5HS	Crowborough	Sale	Fee Changed	£895,000	£17,005	KC	MMJH
01/09/2015	13 Cedar Close, Tunbridge Wells, Kent, TN1 2AB	Tonbridge	Sale	Exchange	£132,000	£2,640	AD	MMJH
04/10/2015	18 Belvedere Court, North Avenue, Tonbridge, Kent, TN9 1	Tonbridge	Sale	Under Offer	£100,000	£2,000	AD	RR
23 Properties								

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The fee due is only shown when the Activity is Sale Agreed or above.

Double clicking on any property will open the properties screen focused to that property.

Click on the  button to print the grid as it is displayed. There is an option to preview the report first.

Changing the from or to date automatically regenerates the report.

When grouped the Price and Fee columns show totals.

Activity Report								
Activity								
Date	Property	Branch	Type	Price	Fee	Neg	Valuer	
Activity : Instruction								
Activity : Valuation								
Activity : Sale Agreed								
15/02/2015	The Old Barn, Tunbridge Wells, Kent, TN2 5HS	Crowborough	Sale	£875,000	£16,625	KC	MMJH	
22/02/2015	1 Blands Drive, Tonbridge, Kent, TN9 2FS	Tonbridge	Sale	£210,000	£4,200	MMJH	KC	
17/03/2015	Flat 2, 125 West Street, Tunbridge Wells, Kent, TN2 3AH	Tonbridge	Rent	£850	£17	KC		
06/04/2015	The Old Barn, Tunbridge Wells, Kent, TN2 5HS	Crowborough	Sale	£875,000	£13,125	KC	MMJH	
22/04/2015	1 Cherry Close, Tonbridge, Kent, TN10 2EF	Tonbridge	Sale	£325,000	£6,500	KC	MMJH	
22/04/2015	11 Brick Street, Westminster, London, W13 7XR	Tonbridge	Sale	£900,000	£13,500	CE		
6 Properties				£3,185,850	£53,967			
Activity : Exchange								
Activity : Under Offer								
Activity : Price Change								
Activity : Offer Rejected								
Activity : Offer Withdrawn								
Activity : Fee Changed								
23 Properties								



This grid has the ability of being grouped and filtered by columns. See [How do I use grid column grouping and filtering?](#) for further information.

5.2 Advertisements Screen

A record of advertisements placed for the selected property can be recorded here.

+ ADVERTISEMENTS SCREEN

Advertisements - The Old Barn, Tunbridge Wells (CRO...
✕

Date	Publication	Comments
03/09/2010	▼ Friday Ad	▼
02/09/2010	▼ Kent & Sussex Courier	▼ Images were blurred. Next ad is free.
01/09/2010	▼ TWells Gazette	▼

+ ✕ 📄 🔍

The publications used regularly can be defined by your system administrator. Any advertisements entered here will also be shown on the [Event History Screen](#).

Date	Date of the publication.
Publication	Publication in which the advertisement was placed.
Comments	Any comments you wish to add.



The system can be configured to automatically record advertisements when advertising reports are generated.

5.3 Applicant/Property Filtering Screen

The same screen with slightly different content is used for filtering both applicants and properties.

APPLICANT/PROPERTY FILTERING SCREEN

The screenshot shows the 'Filter' window with the 'Standard' tab selected. The filter categories and their current values are as follows:

- Address:** Contains [] Filter ☐
- Beds, Baths:** Bedrooms 0, Bathrooms 0, Receptions 0, Garages 0. Filter ☐
- Branch:** Branch Tonbridge, Negotiator KAJ. Filter ☐
- Price:** Min £0, Max £9,999,999. Filter ☐
- Sale:** ☒ Sale, ☐ Rent. Filter ☐
- Status:**
 - ☒ Available, ☒ Available Again
 - ☐ Completed, ☐ Completed (Paid)
 - ☐ Exchanged, ☐ Not Released
 - ☐ Sale Agreed, ☐ Under Offer
 - ☐ Valuation, ☐ Withdrawn
Filter ☐
- Tenure:** ☒ Freehold, ☐ Leasehold. Filter ☐

The 'Selection Criteria' section on the right is expanded, showing the following options:

- Type: ☐ House, ☐ Bungalow, ☐ Maisonette, ☐ Flat
- Style: ☐ Detached, ☐ Semi Detached, ☐ Terraced, ☐ Town House, ☐ Chalet, ☐ Executive, ☐ Purpose Built, ☐ Conversion, ☐ End of Terrace
- Age: ☐ New, ☐ Modern, ☐ Post War, ☐ Pre War, ☐ Period
- Garden: ☐ Garden
- Location: ☐ Location
- Area: ☐ Area
- Garaging: ☐ Garaging

The example shown here is for filtering properties.

The number of properties being viewed can be filtered on in two ways either by using the standard filter (shown) or the advanced filter which can be used when you wish to filter properties by items that are not on the standard filter.

See [How do I filter properties?](#) for more information.

5.4 Applicants Screen







The applicants screen is where all details relating to applicants can be recorded including communications, viewings and matching against properties.

APPLICANTS SCREEN

See [How do I add an applicant?](#)


This screen can be broken down into three primary areas.

LIST OF APPLICANTS

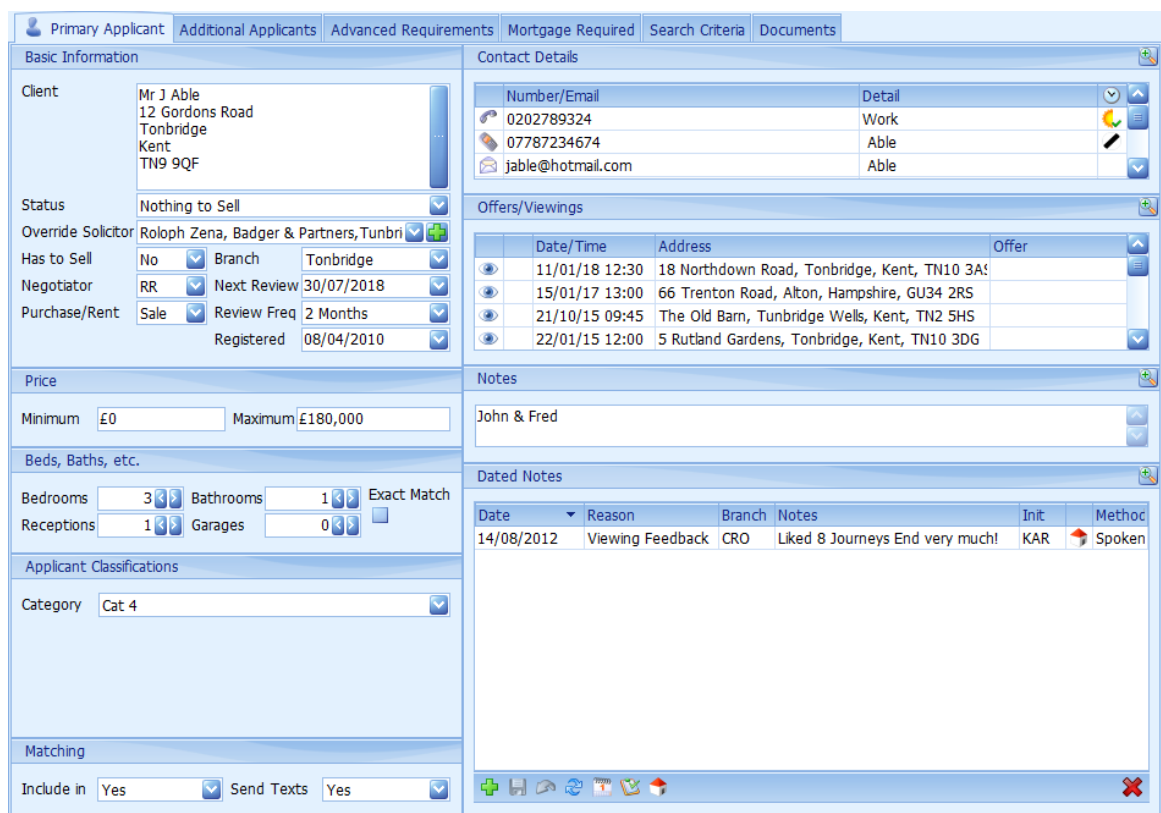
	<p>By default this grid contains a list of all active (non-archived) applicants. By means of the buttons on the toolbar at the bottom left of the grid, applicants can be added , deleted (archived) , saved , have changes cancelled , have information displayed  and be filtered on .</p> <p>To search for a specific applicant any part of the name and address string can be entered in to the search field, which is case insensitive. The search will start 1 second after you finish typing and will only show those applicants that match the search criteria.</p> <p>You can also move between applicants by clicking on the applicant or using the progressive search facility. For example if, when the grid is focused, you press the C key it will move to Cardogan A, if you then press</p>	
--	--	--

the **O** key it will move to **Cork K**, if you then press the **U** key it will move to **Coulson S**, etc.

Clicking on one of the tabs at the top will display a different view of the grid showing either the full name of the reference of the applicant.

Clicking on the information  button will display a pop-up window which is shown on the right which corresponds with the coloured blocks shown against each applicant. The colours represent the status of the applicant. These statuses and colours are configurable by your system administrator.

PRIMARY APPLICANT TAB



Primary Applicant Additional Applicants Advanced Requirements Mortgage Required Search Criteria Documents

Basic Information

Client: Mr J Able
12 Gordons Road
Tonbridge
Kent
TN9 9QF

Status: Nothing to Sell

Override Solicitor: Roloph Zena, Badger & Partners, Tunbri

Has to Sell: No Branch: Tonbridge

Negotiator: RR Next Review: 30/07/2018

Purchase/Rent: Sale Review Freq: 2 Months

Registered: 08/04/2010

Price

Minimum: £0 Maximum: £180,000

Beds, Baths, etc.

Bedrooms: 3 Bathrooms: 1 Exact Match

Receptions: 1 Garages: 0

Applicant Classifications

Category: Cat 4

Matching

Include in: Yes Send Texts: Yes

Contact Details

Number/Email	Detail
0202789324	Work
07787234674	Able
jable@hotmail.com	Able

Offers/Viewings

Date/Time	Address	Offer
11/01/18 12:30	18 Northdown Road, Tonbridge, Kent, TN10 3A	
15/01/17 13:00	66 Trenton Road, Alton, Hampshire, GU34 2RS	
21/10/15 09:45	The Old Barn, Tunbridge Wells, Kent, TN2 5HS	
22/01/15 12:00	5 Rutland Gardens, Tonbridge, Kent, TN10 3DG	

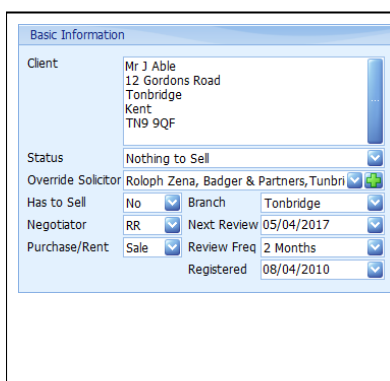
Notes

John & Fred

Dated Notes

Date	Reason	Branch	Notes	Init	Method
14/08/2012	Viewing Feedback	CRO	Liked 8 Journeys End very much!	KAR	Spoken

An explanation of each of the areas is given below. For help on adding a new applicant please refer to [How do I add an applicant?](#)



Basic Information

Client: Mr J Able
12 Gordons Road
Tonbridge
Kent
TN9 9QF

Status: Nothing to Sell

Override Solicitor: Roloph Zena, Badger & Partners, Tunbri

Has to Sell: No Branch: Tonbridge

Negotiator: RR Next Review: 05/04/2017

Purchase/Rent: Sale Review Freq: 2 Months

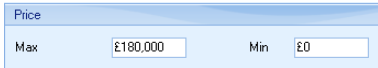
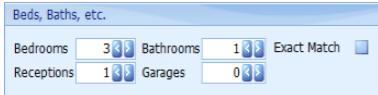
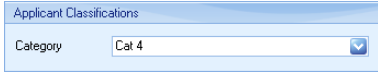
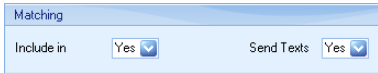
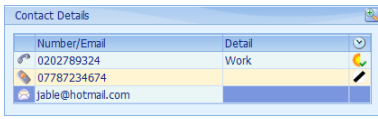

Registered: 08/04/2010

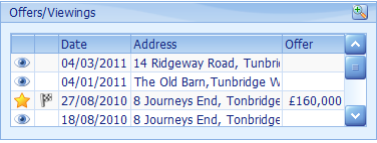



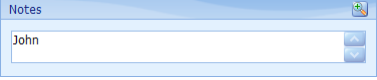


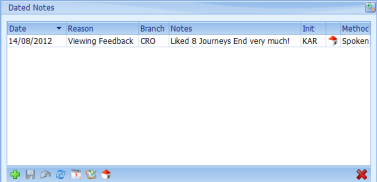



Client: To change the clients details click on the button on the right hand side of the client's name and address. This includes the ability to add contact details. See the [Client's Screen](#) for more information.

Status: The applicant's status. The list of options presented here is configurable by yourselves by your system administrator.

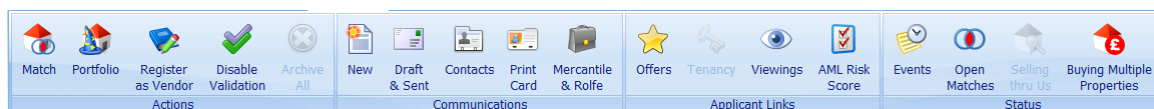
Override Solicitor: A different solicitor can be set here rather than use the default solicitor set at the client level.

Branch: The branch that manages this property can be

	<p>changed if you have been given permission to do so by your system administrator. This does not change the underlying applicant reference but it does affect which branch reviews the applicant. If you do not have access to change this, or you only have one branch configured, then this will be disabled..</p> <p>Has to Sell: Indicates whether or not the applicant has to sell their own house in order to purchase another</p> <p>Purchase/Rent: The default is configurable by your system administrator. Select Sale or Rent from the drop down list. Input fields are added/removed dependent on the selection.</p> <p>Negotiator: Select the Negotiator dealing with this applicant from the drop down list.</p> <p>Next Review Date: This is the next date the client is due for review. This can be changed here but please be aware that this is automatically updated when certain actions are taken. A list of these is given in Frequently Asked Questions.</p> <p>Review Freq: Changing the review frequency will automatically set the next review date based on today's date.</p> <p>Registration Date: Enter the date the applicant first registered with you.</p>								
 <p>Price</p> <p>Max £180,000 Min £0</p>	<p>Max Price: Enter the maximum price the applicant can afford. This field is mandatory.</p> <p>Min Price: Enter the minimum price of property the applicant is interested in. This can be left at zero to include all properties up to their maximum price when matching properties against their criteria.</p>								
 <p>Beds, Baths, etc.</p> <p>Bedrooms 3 Bathrooms 1 Exact Match <input type="checkbox"/></p> <p>Receptions 1 Garages 0</p>	<p>Enter the minimum number of beds,baths, etc. that the applicant requires. Properties that have the same or more of these will be included when matching against their criteria. Any of these fields can be left at zero to exclude their criteria when matching. If the Exact Match check box is ticked the property being matched must have the exact same number of bedrooms, bathrooms, etc (unless they are set to 0).</p>								
 <p>Applicant Classifications</p> <p>Category Cat 4</p>	<p>Applicant classifications are configurable by your system administrator. If defined they are mandatory. Up to five classifications can be defined. If none are defined this box will not be displayed. It makes sense to make these categories cryptic incase they are seen by the applicant.</p>								
 <p>Matching</p> <p>Include in Yes Send Texts Yes</p>	<p>Include in: Applicants are included when matching properties from the Property Screen. If you wish to prevent this then select <i>No</i> from the drop down list.</p> <p>Send Texts: As part of the matching process applicants can be sent text messages. Obviously some people will find this annoying and the option to do so will be removed if this is turned off.</p>								
 <p>Contact Details</p> <table border="1"> <thead> <tr> <th>Number/Email</th> <th>Detail</th> </tr> </thead> <tbody> <tr> <td>0202789324</td> <td>Work</td> </tr> <tr> <td>07787234674</td> <td></td> </tr> <tr> <td>jable@hotmail.com</td> <td></td> </tr> </tbody> </table>	Number/Email	Detail	0202789324	Work	07787234674		jable@hotmail.com		<p>These are the contact details that have been entered for the client. These can be changed by clicking on the button on the right hand side of the client's name and address shown under Basic Information.</p> <p>The  button can be used to undock (expand) the panel to make it easier to see multiple entries.</p>
Number/Email	Detail								
0202789324	Work								
07787234674									
jable@hotmail.com									







	<p>See How do I use the contact details grid? for further information on how to use this grid.</p>
	<p>Outline information on offers and viewings that this applicant has made are displayed here in descending date order (most recent first). Double clicking on a property will open the property screen focused to the respective property. There will be a slight delay while this happens. Double clicking on the  button will undock this panel making it larger for ease of use. A coloured flag is displayed indicating the status of an offer: Red - Fallen through, Green - Accepted, Checkered - Offer Made. An  indicates that an offer was rejected.</p> <p>The  button can be used to undock (expand) the panel to make it easier to see multiple entries.</p>
	<p>Any notes can be added here that are not date related. Double clicking on the  button will undock this panel making it larger for ease of use.</p> <p>The  button can be used to undock (expand) the panel to make it easier to see multiple entries.</p>
	<p>Date related notes can be entered here. See How do I use the navigation buttons? for further help on the navigation bar.</p> <p>The  button can be used to enter the note entered into the diary on the date entered.</p> <p>Clicking on the  button will undock this panel making it larger for ease of use.</p> <p>Clicking on the  button will display the Copy Dated Note screen allowing you to select the property you want to copy the dated note to. If there is an associated vendor he/she will be automatically selected. The copy of the dated note can be amended before saving.</p> <p>Reason and Method can be configured by your EAT System Administrator and by default are not mandatory.</p> <p>By default historic dated notes cannot be changed.</p>

RIBBON BAR



The following screens are available directly from buttons on the ribbon. Clicking on the respective button will jump to the help screen for it (if applicable).

	Opens the Matching Screen asking you if you wish to exclude properties already matched against this applicant before proceeding to match this applicants criteria against all available properties less those already matched as applicable. Once the matching is complete the Applicant/Property Matching Screen will be displayed where you can choose to communicate the results of the matching process to the applicant by text, email or letter.
	Opens the Portfolio Screen selecting a list of properties that match this applicants criteria. This module is designed to be used when seated at a screen that is visible by an applicant. It displays graphically a list of properties one by one according to easily selectable criteria. Properties can be bookmarked and a report of them given to the client. There is an interface to Google Maps so that the location of the properties can easily be seen.
	Provides an easy means of registering the current applicant as a vendor without having to fill in all of the details again. The properties screen is then opened at the new applicants property.
	Opens the letters screen where you can send predefined letters to the applicant by either text, email or post. All letters sent are saved and are accessible by clicking on the Draft & Sent Letters button. See the Communications Screen for more information.
	Provides details of all communications previously sent to the current applicant. Communications can be resent from this screen. See the Customer Communications Screen for more information.
	Displays a list of all contact details for this client including those of the vendor and their solicitor if relevant. There are also tabs on the screen for sales chasing, central notes and chain flow. See the Contacts Screen for more information.
	Prints a file card of the applicants details.
	Offers made by the applicant can be entered and viewed here. See the Offers Screen for more information.
	Opens the Tenancy Screen . Only applicable if renting.

 Viewings	<p>Opens the viewing screen for the current applicant displaying a list of all viewings made and the status of them. Existing viewings can be updated and new viewings can also be entered. Offers can also be added from this screen.</p> <p>See the Viewings Screen for more information.</p>
 AML Risk Score	<p>Opens the Advanced Money Laundering (AML) screen which enables you to select the underlying elements on which it basis the score.</p> <p>See the Advanced Money Laundering (AML) Screen for more information.</p>
 Events	<p>Displays all events associated with the current applicant such as matches, viewings, offers, sent communications, etc. This information can be filtered on and a report printed if so required.</p> <p>See the Event History Screen for more information.</p>
 Open Matches	<p>Displays the matches review screen, where all open matches for the current applicant are displayed.</p> <p>See the Matches Review Screen for more information.</p>
 Selling thru Us	<p>This is an indication of whether or not the current applicant is also selling/letting their property through you. If they are, this button is enabled and clicking on it will open the Properties Screen focused on their property.</p>
 Buying ...	<p>This is an indication of whether or not the current applicant is purchasing/renting any of your properties. If they are, this button is enabled and clicking on it will, if only one property is being purchased open the Properties Screen focused to it. If more than one property is being purchased the Property List Screen will be displayed first offering a choice of which one to display.</p>

Information on the other tabs on the applicants screen is available here:

[Additional Applicants Tab](#)

[Mortgage Required Tab](#)

[Search Criteria Tab](#)

[Documents Tab](#)

5.4.1 Additional Applicants Tab

If there is more than one applicant which is required to be communicated with separately, they can be added here.

Primary Applicant Additional Applicants Advanced Requirements Mortgage Required Search Criteria Documents													
Additional Applicants			Client										
<table border="1"> <thead> <tr> <th colspan="2">Name & Address</th> </tr> </thead> <tbody> <tr> <td></td> <td>Able Susan, 12 Gordons Road, Tonbridge, Kent, TN9 9QF</td> </tr> </tbody> </table>			Name & Address			Able Susan, 12 Gordons Road, Tonbridge, Kent, TN9 9QF	Ms Susan Able 12 Gordons Road Tonbridge Kent TN9 9QF						
Name & Address													
	Able Susan, 12 Gordons Road, Tonbridge, Kent, TN9 9QF												
+ Add using primary applicant's details													
Contact Details			Notes										
<table border="1"> <thead> <tr> <th>Number/Email</th> <th>Detail</th> </tr> </thead> <tbody> <tr> <td> 077872765432</td> <td>Susan Able</td> </tr> <tr> <td> knrandall@gmail.com</td> <td>Susan Able</td> </tr> <tr> <td> www.estateagentpro.com</td> <td>Susan Able</td> </tr> </tbody> </table>			Number/Email	Detail	077872765432	Susan Able	knrandall@gmail.com	Susan Able	www.estateagentpro.com	Susan Able	Mr Able is purchasing this property with his daughter.		
Number/Email	Detail												
077872765432	Susan Able												
knrandall@gmail.com	Susan Able												
www.estateagentpro.com	Susan Able												

To add an additional applicant click on the button. This will open the client screen where you can choose an existing client as the additional applicant or add a new one. See the [Client's Screen](#) for more information.

See [How do I use the navigation buttons?](#) for further help on the navigation bar.

You can add an additional applicant with the same address as the primary applicant using the button.

Information on the other tabs on the applicants screen is available here:

[Primary Applicant Tab](#)
[Mortgage Required Tab](#)
[Search Criteria Tab](#)
[Documents Tab](#)

5.4.2 Mortgage Required Tab

Details about whether a mortgage is required and if the applicant has been referred can be recorded here.

Primary Applicant	Additional Applicants	Advanced Requirements	Mortgage Not Required	Search Criteria	Documents
Required	No <input type="button" value="v"/>	Referred	No <input type="button" value="v"/>	Date Referred	07/01/2015 <input type="button" value="v"/>
Initials	<input type="button" value="v"/>	Spoken to Advisor	No <input type="button" value="v"/>		
Appointment Date/Time	/ / : :	<input type="button" value="v"/>	Where	<input type="button" value="v"/>	
FS Feedback	Await response from advisor <input type="button" value="v"/>				
FSOutcome	Await response from advisor <input type="button" value="v"/>				
Why not Referred	Cash purchaser <input type="button" value="v"/>				
Notes					

Information on the other tabs on the applicants screen is available here:

[Primary Applicant Tab](#)

[Additional Applicants Tab](#)

[Search Criteria Tab](#)

[Documents Tab](#)

5.4.3 Search Criteria Tab

This is where you can specify the type of property the applicant is interested in and a specific area if appropriate.

Clicking on the button will tick all check boxes. Clicking on the button will untick all check boxes.

Property At least one of the check boxes under each classification (Type, Style, etc.) must be ticked. These classifications are configurable by your system administrator. Details entered here will be used in conjunction with other criteria entered on the Primary Applicant Tab when matching against properties. The less specific you are the more matches will be found.

Area Any entries here will be matched against a property's address and if a match is not found the property will be excluded; the match is not case sensitive.

In the example given, if the property is not in **Tonbridge** it will not match

Entries on separate lines will be considered as an **OR** match

For example, if *Tunbridge Wells* was added to the Area box on a separate line, the applicant would then match against properties in Tonbridge or Tunbridge Wells.

AND matching can also be used, by inserting an **and** on the same line

For example: If an applicant wants to only live in George Street, Tonbridge you would enter: George Street **and** Tonbridge

Partial postcodes can also be used for example: TN1. If you specifically only want TN1 to be included, and not TN10 then surround TN1 with a double quote e.g. "TN1 "

* A search will also return any properties that have an address like 'Tonbridge Road or Tonbridge House'. To refine the search you can use a partial postcode, for example: Tonbridge and TN9

Information on the other tabs on the applicants screen is available here:

[Primary Applicant Tab](#)

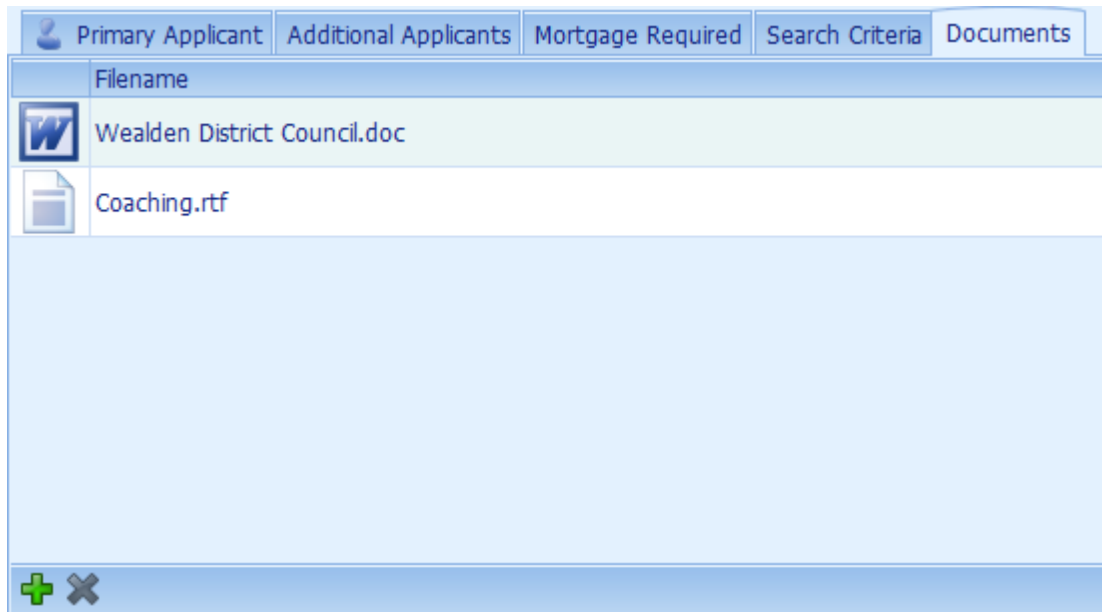
[Additional Applicants Tab](#)


[Mortgage Required Tab](#)

[Documents Tab](#)

5.4.4 Documents Tab

A copy of any external document can be recorded here, for example, a scan of a letter sent by the applicant or in respect of the applicant.



To add a document click on the  button. See [How do I use the navigation buttons?](#) for further help on the navigation bar.

Double clicking the icon will open it using the associated viewer.

Information on the other tabs on the applicants screen is available here:

[Primary Applicant Tab](#)
[Additional Applicants Tab](#)
[Mortgage Required Tab](#)
[Search Criteria Tab](#)

5.4.5 Tenancy Screen

This tab will only be visible for rental applicants.

Expenditure/Receipts

Date	Narrative	In	Out	Balance
02/10/2012	Registration Fee	£200.00		£200.00
17/11/2012	Deposit	£500.00		£700.00

Credit Reference

Agency Used: Experian
 Date Submitted: 17/10/2012 Initial Result: Pending
 Date Returned: 31/10/2012 Final Result: Acceptable
 Guaranteed: No Date:

Deposit Scheme

Provider: The DPS
 Date Registered: 01/11/2012 Number: 1234567890123
 Date Returned: Amount:

Meter Readings

Type	In/Out	Date	Reading	Remarks
Electricity	In	31/10/2012	1024E	

Tenancy

Start Date: 05/11/2012 Duration: 12 Months
 Inventory Agreed: Moved Out:
 Final Inspection:

© 2018 Estate Agent Pro Ltd Logged in as Ken/Tonbridge 27 August 2018 12:53

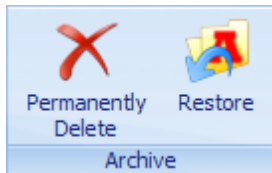
None of these fields are mandatory and can be used according to your requirements.

To add expenditure, income or meter readings click on the button in the bar under its respective grid. You will not be able to do this until you have entered some details in either the Credit Reference, Deposit Scheme or Tenancy Information sections.

See [How do I use the navigation buttons?](#) for further help on the navigation bar.

5.4.6 Archived Applicants Screen

The is screen is the same as the [Applicants Screen](#) but with the additional toolbar shown below.



The following actions are available:

Permanently Delete	The selected applicant and all data associated with them will be permanently deleted. This action cannot be undone. Please use with care.
Restore	The selected applicant and all associated data will be restored to the live database.

5.5 Applicant/Property Matching Screen

This screen displays either properties that have been matched against applicants or applicants that have matched against properties according to the criteria entered. The results of this search can be communicated to the applicant/vendor in a number of ways. The example shown is for applicants matched against a single property. Multiple applicants can be matched against multiple properties from the [Report Generator Screen](#).

APPLICANT/PROPERTY MATCHING SCREEN

The screenshot displays the 'Applicant/Property Matching' screen. On the left, a table lists properties with checkboxes for selection. The central area shows details for '12 Uplands Walk, Tonbridge, Kent, TN9 2SU'. The right-hand pane shows a letter template for 'Applicant Match' with fields for name, address, and date. The bottom status bar indicates '© 2019 Estate Agent Pro Ltd', 'Logged in as Ken/Tonbridge', and the date '11 April 2019 10:37'.

This screen can be broken down into 4 primary areas.

APPLICANT/PROPERTY GRID

Inc	Sent	Applicant	Max Price
Property : 12 Uplands Walk, Tonbridge, Kent, TN9 2SU			
<input checked="" type="checkbox"/>		Allen G, 14 Osbourne Road, Tonbridge	£1,000,000
<input checked="" type="checkbox"/>		Killpatrick S, 99 Grove Street, Tonbridge	£310,000
<input checked="" type="checkbox"/>		Logan JJ, 17 James Street, Tonbridge	£300,000
<input checked="" type="checkbox"/>		Johnston John & Sarah, 33 The Holl	£300,000
<input checked="" type="checkbox"/>		Hackett E, 21 Windermere Avenue,	£250,000
<input checked="" type="checkbox"/>		Randall Ken, 12 Brick Street, Westm	£1,000,000
<input checked="" type="checkbox"/>		Gilbert Elaine, 5 Stanford Avenue, H	£250,000


This grid contains a list of properties which matched the applicants criteria. At this point these matches have been stored in the database. Matches can be modified as follows.


- ☒ Removing the check from the Inc(lude) column will remove the st

When a text message is sent, an email is sent or a letter is print automatically updated. This means that if for example you want that have an email you would click the 'Email All' button which w applicants with a valid email address. You could then print a lette been sent an email by clicking the 'Print All' button.

- Clicking this button will allow you to force a selected property to

could be used for example if you believe that the applicant would property even though it doesn't exactly match their criteria.



 You may have decided to telephone the applicant giving details of viewing now.

 Clicking on the Quick Tick button opens a separate screen which having to merge the letter being used, load the contact details or [Quick Inclusions Screen](#) for more information.

CONTACT DETAILS GRID


Whom	Number/Email	Detail
 Vendor	no number	Home
 Applicant	01892555666	Home
 Applicant	jjlogan@hotmail.com	

These are the contact details that have been entered for the applicant property.

Clicking on the  button will open a screen to enable you to send detailed in the *Whom* column. This has to be configured and added. Clicking on the  button will open a screen enabling you to send. Both of these types of communication will be stored under Draft & applicant or vendor respectively.

APPLICANT LETTER

Letter Applicant Match

 **Tonbridge Estate Agents**
1 High Street, Tonbridge, Kent, TN9 1ST
 Tel: 01892 111111 www.tonbridgeestateagents.com
 E-mail: sales@tonbridgeestateagents.com

Mr & Mrs JJ Logan
 17 James Street
 Tonbridge
 Kent
 TN9 7JJ


Dear Mr & Mrs Logan

26th June 2012

NEW PROPERTIES

The following new properties have just come to market and, as this meets your criteria, we have forwarded these details to you.

The following properties match to your requirements:



PRICE ON APPLICATION
Hornbridge, Heathfield Road, Crowborough, East Sussex, TN6 2LB

- * Character Property
- * Outstanding Location
- * Beautiful garden
- * Must be seen to be appreciated
- * 3 Bedrooms
- * Large lounge


A report of these properties is attached for perusal at your leisure.


We will contact you shortly to see if any of these properties are of interest to you at which time we will be pleased to arrange appointments for you to view any of these properties.

In the meantime we have immediately placed your name on our mailing list and will keep you fully informed of any properties that become available.

Please do not hesitate to contact us as soon as we can help you further.


Yours sincerely



 Ken Clarke
 Manager

Any number of standard letters specifically for applicants, vendors and marketing can be defined by your system administrator and provide standard mail-merge capabilities. As can be seen from this example, signatures can even be merged! The letter to use can be selected by using the  drop down list.

Once merged these letters can be edited before being texted, emailed or printed. The sending/printing of these letters is covered in the [Ribbon Bar](#) section below.

Spell checking, similar to Microsoft Word is used in all letters and certain other areas as appropriate. Misspelled words are underlined with a red squiggly line e.g. interest. Right mouse clicking on the word will provide a list of alternatives.










A thesaurus is available by placing the cursor on any word and then clicking the  button. A screen will be displayed which allows you to replace the current word with a synonym or antonym.

Standard phrases, defined by your system administrator can be inserted using the  button.

RIBBON BAR



It is not the intention of this document to provide an explanation of standard functions found in the Clipboard, Editing and Font ribbon bar groups with the exception of the usage of the thesaurus and Insert Phrase buttons which has already been covered under the [Applicant Letter](#) section above.

	This will open the Email Screen populated with the mail-merged letter along with any attachments added with the selected applicant set as the recipient. Your Email logo if defined is automatically added to the top of the email. At this point additional recipients or cc's can be added. Once sent the letter will be stored, along with any attachments, in the applicants sent letters. The checkbox in the Sent column will be automatically checked. If this button is disabled it is because the applicant doesn't have an email address or email has not been configured by your system administrator.
	This is a split button. If the top part of the button is clicked a dialog will be displayed enabling you to select a file to attach. If the bottom part of the button is clicked a drop down list will be displayed listing the current attachments and a selection of Estate Agent Pro reports containing details of the properties matched. There is also an option to clear the attachment list. Any number of attachments can be added.
	This will send an email to all applicants that have the inc(lude) checkbox ticked, have not already been sent a communication (Sent column ticked), and have an email address. The checkbox in the Sent column will be automatically checked if the email is successfully sent. This will take a little while if emailing lots of applicants. If the <input type="checkbox"/> No Dupes check box has been ticked then the selected letter will only be sent to the same applicant twice. This would be applicable if you were matching multiple properties from the the Report Generator Screen .
	Prints the letter and, as the system assumes you will be posting this to the applicant, stores it in the applicants sent letters. The checkbox in the Sent column will be automatically checked.
	This generates a report of the list of properties matched against the applicant which can be printed. This is designed to be used as a reminder if you wish to send property particulars by post and need to select them later. This is particularly of use when matching multiple applicants at the same time from the report generator.
	This prints address labels for all applicants. This is particularly of use when matching multiple applicants at the same time from the report generator.
	This will open the SMS Text Messaging Screen populated with the mail-merged letter. Once sent the letter will be stored in the applicants sent letters. Letters sent as text messages should be brief as the maximum content of each message is limited to 160 characters. If it is more than this it will be sent as multiple texts. The checkbox in the Sent column will be automatically checked. If this button is disabled it is because the applicant doesn't have a mobile, this functionality has been disabled for the applicant or text messaging has not been configured by your system administrator.  <i>Additional charges apply.</i>
	Opens the Google Maps interface with the focused property displayed. There is an option to show all other properties. Please refer to the Google Map screen for more information

5.6 Automated Viewing Email Error Screen

This screen displays a list of all errors encountered when sending automated viewing emails with each viewing being broken into a separate record for both the applicant and vendor. It is only available if automated emails is enabled.

Viewing	Name and Address	Error Message	Email
14/10/2021	Randall Ken, 12 Brick Street, Westminster, London, W13 7XR	Email is blank	knrandall@gmail.com

1 Errors

© 2021 Estate Agent Pro Ltd | Logged in as Ken/Tonbridge, Email Server: estateagentpro.com | 15 October 2021 12:50




The property/applicant can be accessed from the ribbon bar, as can the individual client records. When editing the client to correct the error, or turn of automated emails to them, you should refresh this screen afterward.

The error can also be cleared but you should only do so after resolving the issue.

5.7 Carousel Screen





The carousel screen is designed to be run in office windows or reception areas and will display a continuous selection of properties and advertisements based on your own criteria and design.

CAROUSEL SCREEN

 Start	 Stop	 Design	Statuses to Include	Available/To Let	Branches	<All Branches>
			Sale/Rent	Both Sale and Rental		
			Only Web Enabled	Yes	Include Archived	No
			Filter			

Initially the ribbon bar is shown and the carousel will not be active until started.

The buttons on the ribbon bar provide the following functionality:

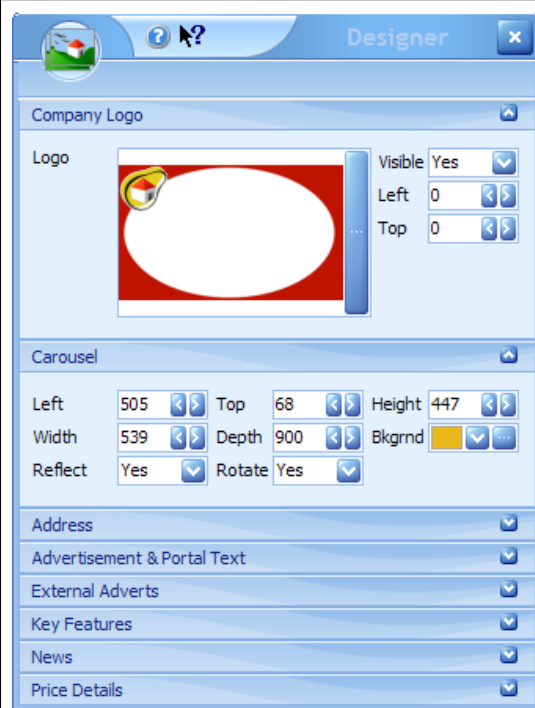
 Start	<p>Starts the carousel running. The ribbon bar will be hidden so that the carousel will run full screen. To make the ribbon bar visible again move the mouse towards the top of the screen.</p> <p> <i>It is recommended that this be run on a screen with a large resolution.</i></p>
 Stop	<p>Stops a carousel that is running.</p>
 Design	<p>Opens the carousel designer. Details below.</p>
Statuses to Include	Choose from the status options in the drop down list.
Sale/Rent	Choose from the sale/rent options in the drop down list.
Only Web Enabled	Option to only show properties that are web enabled.
Include Archived	Option to include archived properties.
Branches	By default properties for all branches are displayed. If you only wish specific branches to be displayed you can select them in the drop down list.

The settings made on this screen will be automatically saved when this screen is closed.

 *It is strongly recommended that no other applications are running on the PC being used.*

CAROUSEL DESIGNER

The Carousel Designer is used to customise the design of the carousel screen.



Any changes made will be automatically saved when this screen is closed.

Most of the panels are initially collapsed. They can be expanded by clicking on the button in the panel header. Any expanded panel can be collapsed by clicking on the button.

Each panel corresponds to an area of the screen. As the left, top, height and width positions are changed in the designer, you will see the changes updated on the screen. Likewise, the position of each component can be changed dynamically on the screen and it will be reflected in the designer.

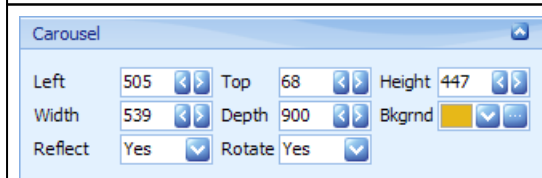
Detailed information on each panel is shown below.



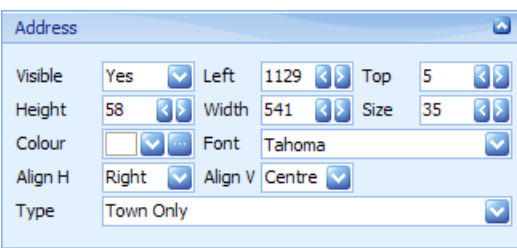

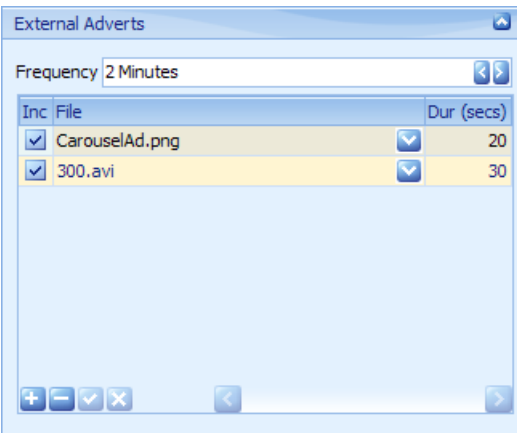
The image to display can be selected by clicking on the button on the right hand side of the logo image placeholder.

If you don't want an image displayed set **Visible** to False. Set **Left** and **Top** to the screen position you want the image to be displayed at.

The image can either be a logo occupying a small area of the screen or, as in the image shown here, one that covers the entire screen. The centre of this image is transparent.



Set **Left**, **Top**, **Height** and **Width** to the screen position you want the property image to be displayed at. **Depth** applies to the depth of the image including the mirror reflection if required. Set the **Background** colour to apply to the whole of the carousel screen. Set **Reflect** to turn on vertical mirror reflection and **Rotate** to have the image rotate through a 360° arc.

	<p>Set Visible to True if you want an address for the property to be displayed. Set Left, Top, Height and Width to the screen position you want the text to be displayed at. Set the Font, font Size and font Colour you wish to use. Align H refers to the horizontal alignment to use an Align V, the vertical alignment.</p> <p>Select how you want the property address to be displayed from the Type drop down list.</p>
	<p>Set Visible to True if you want the Advert & Portal text entered for the property to be displayed. Set Left, Top, Height and Width to the screen position you want the text to be displayed at. Set the Font, font Size and font Colour you wish to use. Align H refers to the horizontal alignment to use an Align V, the vertical alignment.</p> <p>The font size is used as a guideline. If the individual text is too big to fit in the area defined, the font size will be reduced until it does fit.</p> <p>The Key Features and Price Details panels are identical in use to the Advertisement panel.</p>
	<p>External Adverts applies to any file you wish to load at a predetermined interval whilst the carousel is loading. This could, of course, be one of your own.</p> <p>Set the Frequency to be whatever interval you wish to use. In this example every 2 minutes the carousel will stop and will display the advert which has not been displayed for the longest time. 2 minutes later the other advert will be displayed. If you temporarily don't wish an advert to be displayed uncheck the Inc(lude) column. A different dur(ation) can be applied to each advert.</p> <p>Adverts are displayed full screen, and can be any image type such as jpg, png, bmp, etc. or can be a media file such as an avi, mpeg, etc. DirectShow is used for displaying media files so any file that can be displayed by Microsoft Windows Media Player (on the pc the carousel is running on) can be used.</p> <p>Adverts can be added by clicking on the + button on the navigation panel. See How do I use the navigation buttons? for more information.</p>

News

Visible: Yes ☐ Height: 36

Colour:  Size: 18

Font: Tahoma

Feed: <http://feeds.bbc.co.uk/news/uk/rss.xml>

Message: Tonbridge Estate Agents - We try harder!

This is where you can define a news feed to use to be displayed across the bottom of the screen.

Set **Visible** to True if you want to display a news feed. Set the **Height** of the panel and set the **Font**, font **Size** and font **Colour** you wish to use. Enter the news **Feed** you wish to use. Some examples can be selected from the drop down list. Select the **Icon** you wish to display between items in the news feed. If you enter a **Message** it will be displayed before the news feed starts again.

When running, the carousel defined here looks like this:

TONBRIDGE





Situated in a popular road and within walking distance of the town and beach this great family home deserves a look. The accommodation comprises two reception rooms, a good size modern fitted kitchen, downstairs shower room, conservatory, four bedroom and a modern fitted bathroom with separate W.C. The garden would be great for kids and includes a decked area, a lawned garden and a tree house. This property needs to be viewed without delay.

- * Four bedrooms
- * Premier location
- * 24' lounge

O.I.R.O. £324,995

5.8 Chain Flow Screen


The up and down chains can be recorded here for properties under offer and sale agreed. The current property and the purchaser are automatically added. Optionally an additional tab to display/edit the Milestones for each property can be activated in the Admin Options screen. This is off by default.

CHAIN FLOW SCREEN

The screenshot displays the Chain Flow Screen for a specific property chain. The interface is divided into several sections:

- Top Bar:** Includes navigation tabs (Home, Administration, Chain) and a title bar for the current chain.
- Left Panel:** Contains details for the Vendor (Mr Ken Randall), Solicitor (YYY Solicitors Ltd), and Estate Agent (Mrs Brenda Jones). It also includes a Contact Details table with columns for Whom, Number/Email, and Detail.
- Right Panel:** Displays the Chain Down and Chain Up flows. The Chain Down flow shows properties like 11 Brick Street Westminster and 1 Cherry Close Tonbridge. The Chain Up flow shows properties like 2 Manning Road Tonbridge, 20 Turner Gardens Tunbridge, 14 Wood Street Tonbridge, 44 High Street Tonbridge Kent, and 55 High Street Tonbridge Kent.
- Bottom Bar:** Shows the current date and time (28 August 2021 18:19) and the user's login information.

The details shown on the left hand side of the screen are for the focused node of the chain.

The  button can be used to undock (expand) the panel to make it easier to see multiple entries.


The Contact Details shown is for all relevant parties. See [How do I use the contact details grid?](#) for further information on how to use this grid.







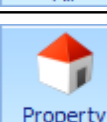
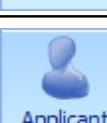


CHAIN RIBBON BAR

The Chain Ribbon Bar is a horizontal toolbar with three main sections:



- Actions:** Contains buttons for Add, Add External, Add, Delete, and Print.
- Sales Chasing:** Contains buttons for Edit Selected and View All.
- View:** Contains buttons for Property, Applicant, and Hide/Show icons.

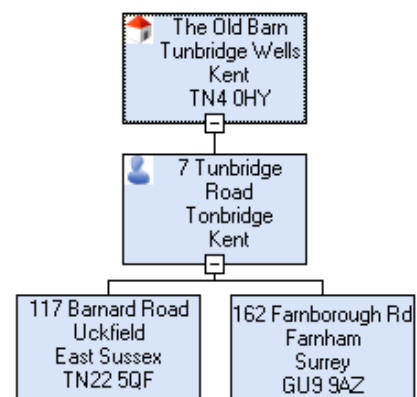
The buttons on the ribbon bar are used as follows:

	Adds a property that you are selling to the chain at the selected node.
---	---

 Add External	Adds a property that is not being sold by you to the chain at the selected node.
 Add	Adds a property of an applicant who is purchasing through yourselves.
 Delete	Deletes the focused node.
 Print	Prints a report of the chain flow.
 Edit Selected	Edit sales chasing dates. If this is one of your own properties the Sales/Rent Status Screen focused to the Sales Chasing Tab will be displayed. If not the Chain Flow Sales Chasing Screen will be displayed.
 View All	Displays a screen showing the respective sales chasing dates for all properties in the chain. See the Sales Chasing Report for more information.
 Property	If the focused property is being sold through yourselves this button will be enabled and clicking on it will open the Properties Screen focused to it.
 Applicant	If the focused property is that of an applicant buying through yourselves this button will be enabled and clicking on it will open the Applicants Screen focused to it.
 Hide	Hides the down chain.
 Hide	Hides the up chain.

It is possible to have split chains by focusing on a selected node that already has an entry below it before clicking on any of the add buttons.

If the property is being sold through you a  will appear in the top left hand corner of the node. If the applicant is registered on your system a  will appear in the top left hand corner.




MILESTONES

The screenshot shows the 'Chain - The Old Barn, Tunbridge Wells (CRO0000068)' window. The 'Milestones' ribbon bar is active, displaying icons for 'Cancel Changes', 'Refresh', 'Print', and 'Save'. Below the ribbon bar, a table lists milestones for various properties in the chain. The table has columns for 'Event', 'Date', and several property addresses. The 'Event' column is fixed to the left. The 'Date' column shows completion dates. The bottom of the table shows progress percentages for each property.

Milestones	Down	Home	Up					
Event	11 Brick Street Westminster London W13 7XR	1 Cherry Close Tonbridge Kent TN10 2EF	The Old Barn Tunbridge Wells Kent TN2 5HS	2 Manning Road Tonbridge Kent TN11 6AC	20 Turner Gardens Tunbridge Wells Kent TN1 1DB	14 Wood Street Tonbridge Kent TN19 5PK	44 High Street Tonbridge Kent TN9 6TY	55 High Street Tonbridge Kent
Paid Searches to Solicitor	27/08/2021		02/08/2021	04/08/2021	27/08/2021			
Solicitor Applied for Deeds	27/08/2021		06/08/2021	11/08/2021	27/08/2021			
Filled in Mtg Forms	26/08/2021		03/08/2021	12/08/2021				
Paid Survey Fee			12/08/2021					
Filled in Fixtures Forms			11/08/2021					
Solicitor Sent out Contract			27/08/2021					
Received Sellers Contract	N/A	N/A						
Local Searches Applied for								
Employee Ref Received								
Credit Ref Done	28/08/2021							
Local Searches in								
Survey Done								
Received Mtg Offer								
Booked for Signing			N/A					
Buyer Aware Deposit Rules	N/A	N/A	N/A					
Signed Contract	N/A	N/A	N/A					
	47%	20%	60%	20%	13%	0%	0%	0%

© 2021 Estate Agent Pro Ltd Logged in as Ken/Tonbridge, Email Server: estateagentpro.com 31 August 2021 12:23

The properties that are being sold by yourselves will have the  image displayed in the bottom right corner of the address. Clicking on the address for any of these properties will open the [Sales/Rent Status Screen](#).

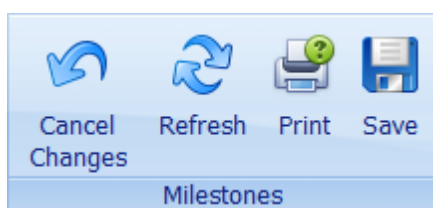
The Milestones Event column is fixed to the left hand side. Columns can be re-sized horizontally.

If the milestone is not relevant e.g. set as for purchaser it will be struck out as in **Employee Ref Received** above.

The totals at the bottom represent the percentage completed ignoring the N/A's and those that are not applicable .

An entry can be set as N/A by right mouse clicking on it.

MILESTONES RIBBON BAR



Switching between the tabs will also switch the ribbons.

5.8.1 Sales Chasing Report

Displays sales chasing dates for all properties in the chain.

£

?

🔍

📄

Chain - The Old Barn, Tunbridge Wells (CRO0000068)

📄

✕

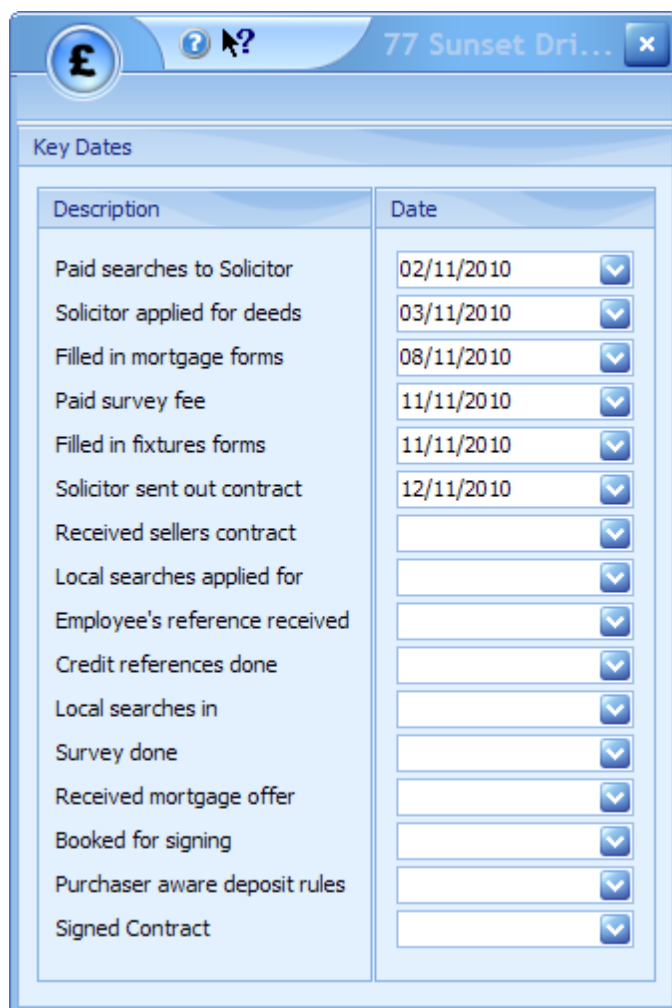
Address	Paid Searches to Solicitor	Solicitor Applied for Deeds	Filled in Mtg Forms	Paid Survey Fee	Filled in Fixtures Forms	Solicitor Sent out Contract	Received Sellers Contract	Local Searches Applied for	Employee Ref Received	Credit Ref Done	Local Searches in	Survey Done	Received Mtg Offer	Booked for Signing	Buyer Aware Deposit Rules	Signed Contract
2 Manning Road, Tonbridge, Kent, TN11 6AC	01/12/10	02/12/10	03/12/10													
20 Turner Gardens, Tunbridge Wells, Kent, TN1 1DB	07/12/10	08/12/10														
The Old Barn, Tunbridge Wells, Kent, TN4 0HY	01/09/10		02/09/10	02/09/10												
13 Prince Street, Tonbridge, Kent, TN9 9GB	10/11/10	19/11/10	01/12/10													
77 Sunset Drive, Tunbridge, Kent, TN11 2AT	02/11/10	03/11/10	08/11/10	11/11/10	11/11/10	12/11/10										
16 Kingsmill Road, Tunbridge Wells, Kent, TN2 6WE	06/12/10	07/12/10														

An image in the left most column indicates the direction of the chain.

Double click a property to edit dates If this is one of your own properties the [Sales/Rent Status Screen](#) focused to the [Sales Chasing Tab](#) will be displayed. If not the [Chain Flow Sales Chasing Screen](#) will be displayed.

5.8.2 Sales Chasing Screen

This is used to record relevant key dates as the solicitor progresses the sale for those properties that are not your own.



Description	Date
Paid searches to Solicitor	02/11/2010
Solicitor applied for deeds	03/11/2010
Filled in mortgage forms	08/11/2010
Paid survey fee	11/11/2010
Filled in fixtures forms	11/11/2010
Solicitor sent out contract	12/11/2010
Received sellers contract	
Local searches applied for	
Employee's reference received	
Credit references done	
Local searches in	
Survey done	
Received mortgage offer	
Booked for signing	
Purchaser aware deposit rules	
Signed Contract	

The items listed here are configurable by your system administrator.

5.9 Client Review Screen

The client review screen is where clients are reviewed. Each client can have an individual review cycle set (default 30 days) and is designed so that you can more easily control your client list.

If a client is a vendor or applicant the next review date will be automatically reset whenever they are edited, a dated note, sales chasing note, offer or viewing is added.

CLIENT REVIEW SCREEN

Client Review Form

From: N/A To: 02/06/2018

Archive Refresh View Edit

Contacts New Print Preview

Preset Tomorrow On

1 Week 1 Month

Buying thru Us Status

Client Review Form

Drag a column header here to group by that column

Branch	Name and Address	Sale/Rent	Neg	Val	Price	Reg Date	Reviewed	Status
CRO	Randal Ken, 12 Brick Street, We	Purchase	KC (M)	KC	£999,995	01/01/18	31/05/18	Prop: Available
CRO	Rawlings P, 6 Butcher Street, Tc	Purchase			£150,000	01/08/10	30/01/13	App: Nothing to Sell
CRO	Redbridge R, 81 Arthur Street, T	Purchase			£125,000	21/08/10	30/01/13	App: Sale Agreed
CRO	Ridgeway R, 14 Ridgeway Road, P	Purchase	CE	RR	£185,000	01/01/18	30/01/13	Prop: Sale Agreed
CRO	Roberts R, 26 Juniper Close, Tor	Purchase			£225,000	04/09/10	30/01/13	App: Other Agent
CRO	Rutland R, 5 Rutland Gardens, Ti	Purchase	KC (CF	MMJH	£325,000	01/01/18	20/01/15	Prop: Available
CRO	Sargeant K, 33 Bush Street, Tor	Purchase			£160,000	08/09/10	30/01/13	App: Nothing to Sell
KEY	Smith Ian, 99 Bramble Drive, Hal	Purchase	AD		£0	01/01/18	02/06/16	Prop: Valuation
KEY	Sparkes F, 1 Fox Close, Clayton	Purchase	RR		£0	01/01/18	28/09/13	Prop: Valuation
CRO	Spiral L, 1 The Spiral, Tonbridge	Rent	KW	RR	£185,000	01/01/18	28/06/16	Prop: Valuation
KEY	Spiral L, 1 The Spiral, Tonbridge	Purchase	RR	RR	£185,000	01/01/18	28/06/16	Prop: Valuation
CRO	Stephens L, 78 Alderton Road, T	Purchase			£170,000	04/08/10	16/12/13	App: Our Vendor
CRO	Surrey S, 32 Surrey Road, Tunbr	Purchase			£177,000	01/01/18	20/01/15	Prop: Available
CRO	Trowbridge H, 17 Turner Street	Purchase			£250,000	12/08/10	30/01/13	App: Nothing to Sell
CRO	Tuffnell T, 7 South Street, Tunt	Purchase			£200,000	06/09/10	30/01/13	App: Investor
CRO	Turner P, 6 Waldron Street, Tor	Purchase			£250,000	12/08/10	01/01/13	App: Nothing to Sell
CRO	Uplands U, 12 Uplands Walk, Tor	Purchase			£252,000	01/01/18	01/01/13	Prop: Available
CRO	Upper Y, 41 Maplins Road, Tonb	Purchase			£200,000	21/07/10	01/01/13	App: Other Agent
CRO	Van Den Ezen Maria, 18 The Gl	Purchase	KC (CF		£1,000,000	09/01/17	15/01/17	App: Cash Buyer
CRO	Victoria Y, 62 Victoria Street, Tc	Purchase			£175,000	29/07/10	01/01/13	App: Our Vendor
CRO	Vincent W, 75 Group Hill Drive, T	Purchase			£250,000	09/07/10	01/01/13	App: Sale Agreed

133 Clients

Contact Details

Number/Email	Detail
01892 525448	Work
020 7491 7777	Home
07872 123456	
ken@pairsoftwhere.com	

Offers/Viewings

Date	Address	Offer
<No data to display>		

Dated Notes

Date	Reason	Branc Notes	Init Method
12/10/2015	Viewing Feedback	CRO Mr J Able - Vendor updated	KC Spoken

Properties

11 Brick Street, Westminster, London, W13 7XR
The Old Barn, Tunbridge Wells, Kent, TN2 5HS

© 2018 Pair Softwhere LLP Logged in as Ken/Tonbridge 02 June 2018 12:15

Clients should be reviewed daily otherwise the number of clients to review will become too large to manage.

This screen can be broken down into 4 primary areas.

CLIENT GRID



Drag a column header here to group by that column

Branch	Name and Address	Sale/Rent	Neg	Val	Price	Reg Date	Reviewed	Status
KEY	Pearce Bruce,94 Valebridge R	Rent	CE		£0	18/05/06	16/04/13	Prop: Valuation
CRO	Pearl P,13 Pearl Road, Tonbric	Purchase	KC	MMJH	£249,000	14/06/05	30/01/13	Prop: Available
CRO	Petty D,171 Bridge Road, Tur	Purchase			£320,000	31/07/10	30/01/13	App: Other Agent
CRO	Pope V,91 Tonbridge Roas, T	Purchase			£200,000	09/09/10	30/01/13	App: Cash Buyer
CRO	Popular N,11 Popular Close, T	Purchase	KW	MMJH	£210,000	20/08/10	30/01/13	Prop: Available
CRO	Purdy L,16 Grove Hill Road, T	Purchase			£200,000	02/09/10	30/01/13	App: Sale Agreed
CRO	Queen HM,4 Victoria Crescent	Purchase			£230,000	09/09/10	30/01/13	App: Nothing to Sell
CRO	Quicken S,3 The Drive, Tonbr	Purchase			£240,000	13/07/10	30/01/13	App: Sale Agreed
CRO	Randall Ken,12 Brick Street, V	Purchase	KC	KW	£895,000	09/01/17	15/01/17	Prop: Under Offer
CRO	Rawlings P,6 Butcher Street, :	Purchase			£150,000	01/08/10	30/01/13	App: Nothing to Sell
CRO	Redbridge R,81 Arthur Street,	Purchase			£125,000	21/08/10	30/01/13	App: Sale Agreed
CRO	Ridgeway R,14 Ridgeway Roa	Purchase	CE	RR	£185,000	30/09/05	30/01/13	Prop: Sale Agreed
CRO	Roberts R,26 Juniper Close, T	Purchase			£225,000	04/09/10	30/01/13	App: Other Agent
CRO	Rutland R,5 Rutland Gardens,	Purchase	KC	MMJH	£325,000	15/02/06	20/01/15	Prop: Available

124 Clients


This grid contains all clients that are due for review. If a client is selling or buying more than one property they will appear more than once in the list.

Certain columns can be dragged to the group area as indicated.


A  in the left most column indicates that the client is a vendor. A  indicates that the client is an applicant.

A  in the rightmost column indicates that the client has been flagged as important.

Double clicking on a client will open either the applicant or properties screen focused to the respective client or clients property.

If the client is a vendor the status of the property will be indicated by a coloured block at the left hand side of the grid. If the client is an applicant then the colour will indicate the status of the applicant. Clicking on the information  button will display a pop-up window detailing the meaning of the colours. The colours and the applicant statuses can be configured by your system administrator.

The Status column is a combined status showing either the applicant status or property status as applicable.


 This grid has the ability of being grouped and filtered by columns. See [How do I use grid column grouping and filtering?](#) for further information.

NOTES

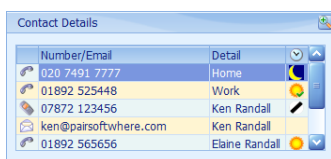
Notes

Like Doncaster Road - lived there five years.

The notes entered against the applicable applicant or vendor.


The  button can be used to undock (expand) the panel to make it easier to see multiple entries.


CONTACT DETAILS GRID




Number/Email	Detail
020 7491 7777	Home
01892 525448	Work
07872 123456	Ken Randall
ken@pairsoftwhere.com	Ken Randall
01892 565656	Elaine Randall


These are the contact details that have been entered for the focused client.

The  button can be used to undock (expand) the panel to make it easier to see multiple entries.

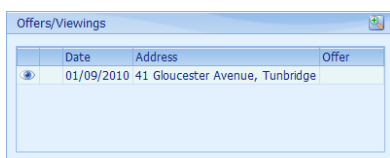
Clicking on the  button will open the [SMS Text Messaging Screen](#) to send a message. This has to be configured and additional charges apply.

Clicking on the  button will open the [Email Screen](#) enabling you to send an email.


Both of these types of communication will be stored under Draft & Sent Communications of the client. See the [Customer Communications Screen](#) for further information.



Double clicking on the  button will undock this panel making it larger for ease of use.

OFFERS/VIEWINGS

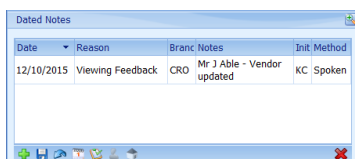


Date	Address	Offer
01/09/2010	41 Gloucester Avenue, Tunbridge	

The  button can be used to undock (expand) the panel to make it easier to see multiple entries.


Outline information on offers and viewings that this applicant has made are displayed here in descending date order (most recent first). Double clicking on a property will open the property screen focused to the respective property. There will be a slight delay while this happens. Double clicking on the  button will undock this panel making it larger for ease of use. A coloured flag is displayed indicating the status of an offer: Red - Fallen through, Green - Accepted, Checkered - Offer Made. An  indicates that an offer was rejected.


DATED NOTES




Date	Reason	Branc Notes	Init. Method
12/10/2015	Viewing Feedback	CRO Mr J Able - Vendor updated	KC Spoken

Client date related notes can be entered here. See [How do I use the navigation buttons?](#) for further help on the navigation bar.

The  button can be used to undock (expand) the panel to make it easier to see multiple entries.

The  button can be used to enter the note entered into the diary on the date entered.

Double clicking on the  button will undock this panel making it larger for ease of use.

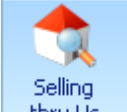
Reason and Method can be configured by your EAT System Administrator and by default are not mandatory.

By default historic dated notes cannot be changed.

RIBBON BAR

From To	N/A 01/02/2017											
Archive Refresh		View	Edit	Contacts	New	Print Preview	Preset	Tomorrow	On			Buying thru Us
Action		Client	Communications			Review			Status			

From To	Changing these dates repopulates the client grid with reviews that are due on the date entered. This is handy if for example you will be out of the office for a week so want to review them in advance now. The from date defaults to N/A but can be changed if necessary.
Archive	The applicant or vendor can be deleted (archived) directly from this screen if you believe nothing further is going to happen with them.
Refresh	Reloads the list of clients to be reviewed.
Edit	Opens the respective Client screen for editing.
Contacts	Displays a list of all contact details for the selected client
New	Opens the Communications Screen for the sending of letters by email, text, etc.
Print	Prints the grid
Preset	Sets the next review date for that preset for the client and removes the client from the list.
Tomorrow	Sets the review date for tomorrow and removes the client from the list.
1 Week	Sets the review date for 1 weeks time and removes the client from the list.
1 Month	Sets the review date for 1 months time and removes the client from the list.
On	Sets the next review date as the date entered and removes the client from the list. This option is disabled until a date is entered.
Buying thru Us	If the client is a vendor and this button is enabled it is an indication they are also buying a property through you. Clicking on this button will open the Applicants Screen for them.

 A square button with a light blue background. It features a small icon of a house with a red roof and a magnifying glass over it. Below the icon, the text "Selling thru Us" is written in a small, dark blue font.	<p>If the client is an applicant and this button is enabled it is an indication they are also selling a property through you. Clicking on this button will open the Properties Screen focused to their property..</p>
---	---

5.10 Client's Screen

This is where all base information pertaining to the client can be entered and maintained. A client can be an applicant or a vendor or both.

CLIENTS SCREEN

A variation of this screen is used to add all types of clients including applicants, additional applicants, vendors, additional vendors, accountants, estate agents, landlords, solicitors, surveyors and any other user category you may wish to have such as plumbers or electricians.

The same client can be one or more of these, even all of them!



This is a fundamental part of the system and it is very important that the client concept, and how it should be used, is fully understood by all users.

NOTIFICATION AREA

As this screen is fundamental to the operation of Estate Agent Pro the notification are indicates

what you are doing in case you have ended up here accidentally or were interrupted whilst in this screen.

The general tab can be broken down into 6 separate areas which are covered below.

NAME & ADDRESS

Name & Address

Surname	Randall	Title	Mr
First Name	Ken	Initials	KA
Greeting	Dear Mr Randall	Position	
Company		VIP	<input checked="" type="checkbox"/>
Address	12 Brick Street Westminster London W13 7XR		

When adding a new client, after entering the **surname** field, a pop-up dialog will list all clients with the surname so that you can double check that this client is not already in the system. It is very important that clients are only added once otherwise when bulk mailing clients added twice will receive two communications!

The VIP field, if checked, will be indicated accordingly in Client drop downs.

Client already in Database?

Use Selected Skip & Continue Adding

ClientRef	Name and Address
KEY0005059	Smith Ian, 99 Bramble Drive, Hailsham, East Sussex, BN27 3EQ

You then have a choice of selecting any client in the list and then clicking **Use Selected** or **skip & continue adding** the new applicant.

The **greeting** field can be used in standard letters. It automatically defaults to Dear <Title> <Surname>.

The **company name** and **job position** fields should only be entered for companies, it should not be used for normal applicants or vendors.

To change the **address** click on the button on the right hand side. This will display the Address Details screen where the new address can be entered. See the [Address Screen](#) for further information. The Address screen is also automatically activated when you tab into or click on the address.

When the **Important** check box is ticked a red flag  will be shown against the client in the [Client Review Screen](#).

CATEGORIES

Categories			
Category	Vendors (Current)	Age	40 to 50
Response	Client Recommended	Review	1 Month

The **Category (User)** field is for you to classify clients however you wish but will not effect the internal category used by Estate Agent Pro. The categories listed can be amended by your system administrator.


The **Age** field is for information only and may be of use for mortgage purposes.

Response (monitoring) enables you to identify where your business is coming from. This information can be reported on in the [Report Generator Screen](#). Again, your system administrator can amend this list.

The **Review** (frequency) is very important. Clients who are applicants and/or vendors can be reviewed in the [Client Review Screen](#). This should be done on a daily basis. Use this field to set how frequently they should be reviewed. The default can be set by your system administrator.

PROFESSIONAL CONTACTS

Professional Contacts	
Estate Agent	Jones Brenda, Tonbridge Estate Agents, Tonbridge
Solicitor	Badger J, Badger & Partners, Tunbridge Wells
Referred	<input checked="" type="checkbox"/>

The clients **estate agent** and **solicitor** (if known) should be selected here. If the client is a vendor the estate agent should be set to yourselves. The list of estate agents and solicitors is configurable by your system administrator or, if you have the access rights to do so, you can add them here by clicking on the respective  button.

When a solicitor is referred by you this information is recorded along with the date and who did it. This information is then available in the Dashboard, Solicitors Referred Report, and various filters throughout EAP. This cannot be set unless a solicitor is defined.

These fields can be cleared by using the shift-del key combination.

CONTACT DETAILS

Type	Number/Email	Pref	Detail	
Phone	020 7491 7777	<input type="checkbox"/>	Home	🌙
Phone	01892 525448	<input checked="" type="checkbox"/>	Work	☀️
Mobile	07872 123456	<input type="checkbox"/>		📱
Email	ken@pairsoftwhere.com	<input type="checkbox"/>		

Enter the **contact details** for the client here. They can be added by clicking on the button on the navigation panel. See [How do I use the navigation buttons?](#) for more information.

Use the Type column to select the type of device. It will then be graphically displayed in the first column. In addition to the types shown, fax, pager, DX and web addresses can be entered.

The **Pref** is used to specify the preferred method of communication. It is also used to specify which number or email to use within an individual **type** when used in conjunction with standard letters if there is more than one entry for a specific device type. For example, if the standard letter field **Applicant - Telephone** is used, in this instance, the work telephone number will be used. This is also used in other screens where bulk emails are possible such as the [Applicant/Property Matching Screen](#).

There can only be one default per device type.

The column represents restrictions on when the client can be contacted. These times are fixed and are shown wherever contact details are displayed in Estate Agent Pro. Images are used for this purpose and are as follows morning only, afternoon only, day time only, evening only, no limit and other (the details of which should be specified in the notes). If the Pref(ferred) communications method has been set in the Client's screen then the images will be shown as , , , and respectively when they are viewed anywhere else in Estate Agent Pro. The setting of a contact time can be made mandatory for mobile and telephone numbers by your system administrator in Admin>General Options>Client - Validate Preferred Contact Time.

At least one contact must be provided per client.

You can enter an unlimited number of contact details. These are displayed on numerous screens within Estate Agent Pro. See [How do I use the contact details grid?](#) for more information on how they can be used.

GENERAL DATA PROTECTION REGULATION (GDPR)

Signed Date Signed

You should store the signed document

This is used to record that clients have given you signed consent to store and use their data under the terms of the General Data Protection Regulation (GDPR).

+ ICO

ICO

Registered Expiry Date

Reg No.

This is used to record relevant GDPR ICO information








= NOTES

Notes





Mr Randall is one of the most good looking and intelligent men I've ever met!

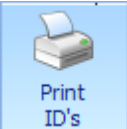

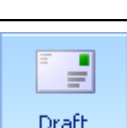
Enter any relevant **notes** here. They are only accessible from this screen.

= RIBBON BAR

						
Save & Exit	Cancel & Exit	Clone Client	Use Existing	Print ID's	New	Draft & Sent
File					Communications	

The buttons on the ribbon bar are used as follows:

	Saves the changes made after validating input and exits.
	Discards any changes made and exits. If you were adding a new applicant or property the operation will be cancelled.
	This button is only enabled if you are adding a new client. It is useful when you know another client exists with the same address.
	This button is only enabled when you are adding a new property. If the vendor already exists in the database then use this button to select who the vendor is.

 Print ID's	Prints the details entered on the Identification Tab .
 New	Opens the letters screen where you can send predefined letters to the client by either text, email or post. All letters sent are saved and are accessible by clicking on the Draft & Sent Letters button. See the Communications Screen for more information.
 Draft & Sent	Provides details of all communications previously sent to the current client. Communications can be resent from this screen. If the client is an applicant or vendor these communications are also available from the same button on the applicants or properties screen. See the Customer Communications Screen for more information.

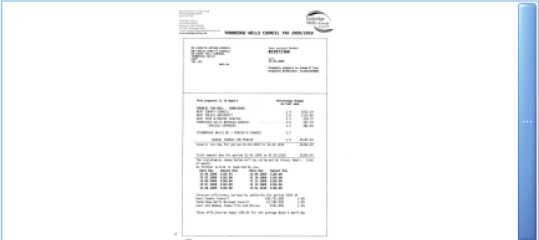

Information on the other tabs on the Client's screen is available here:

[Identification Tab](#)

[Documents Tab](#)


5.10.1 Identification Tab

Scans of relevant documentation used for identification purposes can be recorded here.

General		Identification	
Address		Client	
Identification Type	Council Tax	Identification Type	Passport
Details (if Other)		Details (if Other)	
Account No	98765432	Reference No	12345678
Bill Within 3 Months?	Yes	Expiry Date	09/07/2015
Date Checked	01/11/2010	Date Checked	01/11/2010
Date of Birth	09/07/1963	Date of Birth	09/07/1963
Remarks		Remarks	
Image		Image	
			

The recording of this data is in respect of money laundering.

To add an image click on the button on the right hand side of the image box.

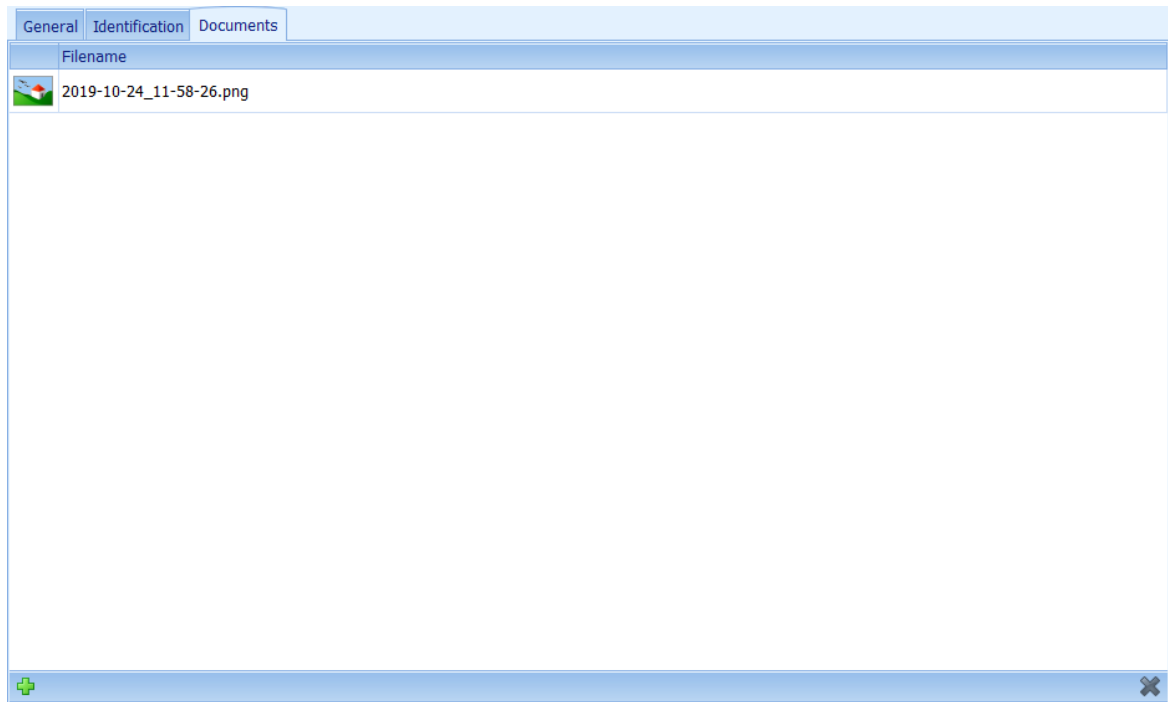
The image can be zoomed in on by clicking on the  button.


Information on the other tabs on the Client's screen is available here:

[General Tab](#)
[Documents Tab](#)

5.10.2 Documents Tab

A copy of any external document can be recorded here, for example, a scan of a letter sent by the client.



To add a document click on the  button. See [How do I use the navigation buttons?](#) for further help on the navigation bar.

Double clicking the icon will open it using the associated viewer. Microsoft Word and Excel documents will be opened internally in EAP and can be edited.

Information on the other tabs on the Client's screen is available here:

[General Tab](#)

[Identification Tab](#)

5.11 Communications Screen

This is where you can send predefined letters to applicants or vendors by either text, email or post. All letters sent are saved and are accessible by clicking on the Draft & Sent Letters button on various screens. See the [Customer Communications Screen](#) for more information. The example given below is for letters to vendors. Letters to applicants works in exactly the same manner.

COMMUNICATIONS SCREEN

This screen can be broken down into 4 primary areas.

INCLUDE LIST GRID

This grid contains a list of vendors grouped by primary and secondary vendors that communications can be sent to.

The primary vendor is always shown at the top of the grid.


Removing the ☒ check from the Inc(lude) column will exclude the applicant from being sent the letter when using Email All, Print All and Text All.


Once the selected letter has been sent, via any means to the vendor the Sent column will be automatically ticked.

CONTACT DETAILS GRID

Number/Email	Detail
01892 525448	Work
020 7491 7777	Home
07872 123456	Ken Randall
ken@pairsoftwhere.com	Ken Randall

These are the contact details that have been entered for selected vendor.

The image in the left hand column indicates the type of communication device applicable. Clicking on the  button will open a screen to enable you to send text messages to them. This has to be configured and additional charges apply.

Clicking on the  button will open a screen enabling you to send an email. Both of these types of communication will be stored under the Draft & Sent Communications of the applicant.

LETTER

Letter # Vendor test

Vendor Address - String:

12 Brick Street, Westminster, London, W13 7XR

Vendor Address - Block:

12 Brick Street
Westminster
London
W13 7XR

Vendor Name - Greeting:

Dear Mr Randall

Price - Agreed £875,000

Vendor - Commission Rate 1.9

Vendor - Commission Amount

Branch - VAT Rate 20%

Invoice - Commission Amount £16,625.00


Invoice - VAT Amount £3,325.00

Invoice - Total Amount £19,950.00

Vendor - Viewing Arrangements:

This is just a dummy letter used to indicate that many different merge fields can be automatically included.


Any number of standard letters specifically for applicants, vendors and marketing can be defined by your system administrator and provide standard mail-merge capabilities.

The letter to use can be selected by using the  drop down list. Once merged these letters can be edited before being texted, emailed or printed.


The sending/printing of these letters is covered in the [Ribbon Bar](#) section below.

Spell checking, similar to Microsoft Word is used in all letters and certain other areas as

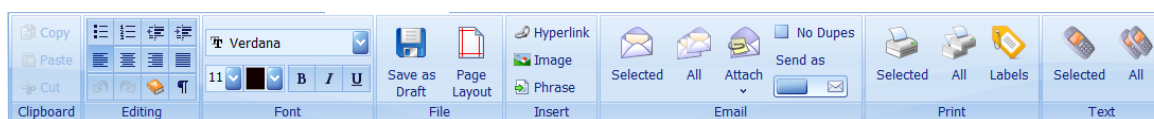
appropriate. Misspelled words are underlined with a red squiggly line e.g. interest. Right mouse clicking on the word will provide a list of alternatives.



A thesaurus is available by placing the cursor on any word and then clicking the  button. A screen will be displayed which allows you to replace the current word with a synonym or antonym.








Standard phrases, defined by your system administrator can be inserted using the  button.








 This screen is designed to save you money when communicating with lots of applicants. It is recommended that whenever possible you email all applicants that have an email address by clicking the Email All button as this doesn't cost anything. The checkbox in the Sent column will automatically be updated if the email was successfully sent. Next, if the letter is small, send a text to all of the remaining applicants that have a mobile phone by clicking the Text All button. Again the checkbox in the Sent column will be automatically updated. You can then print the letter to all of the remaining applicants by clicking the Print All button.

RIBBON BAR



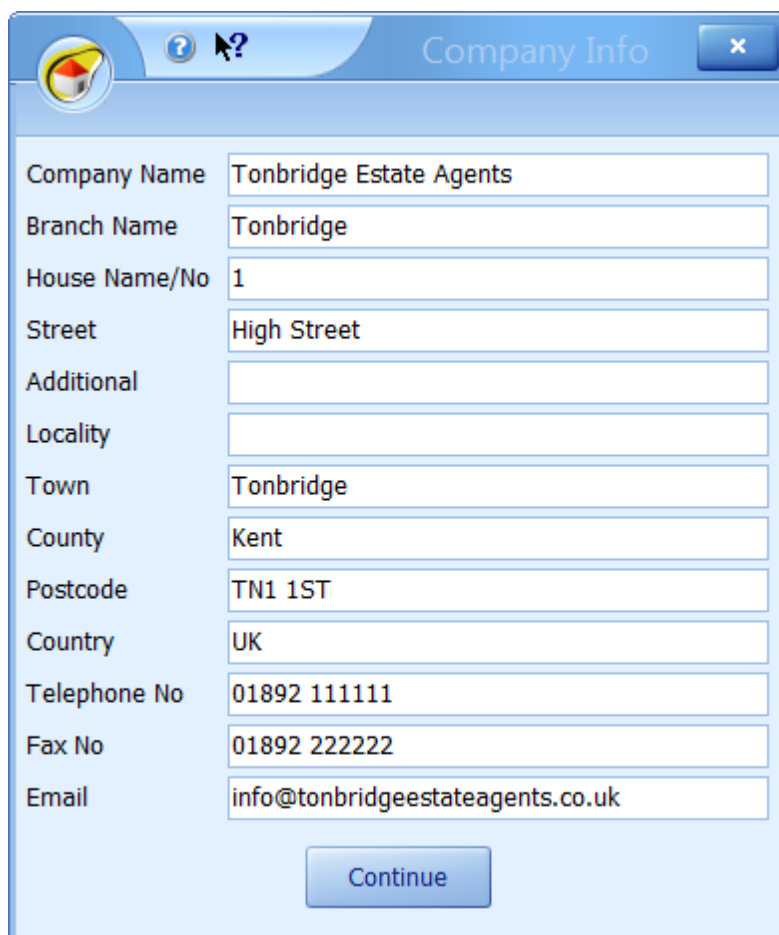
It is not the intention of this document to provide an explanation of standard functions found in the Clipboard, Editing and Font ribbon bar groups with the exception of the usage of the  thesaurus and  Insert Phrase buttons which has already been covered under the [Applicant Letter](#) section above.

	Hyperlinks, Images and predefined standard phrases can be inserted by clicking on the appropriate button. A dialog will be displayed to make the appropriate selection. When inserting hyperlinks, if you first select the text you wish to be displayed, for example 'Click here to see your property on our website', this text will be displayed instead of the hyperlink.
	If a letter has been modified, and you decide that you don't want to send it now, but would like to later, it can be saved as a draft letter by means of this button. Draft letters can be viewed and sent in the applicable screen, in this case the Properties Screen .
	Changes can be made to the page layout of the letter here. These changes are only temporary.
	This will open the Email Screen populated with the mail-merged letter along with any attachments added with the selected applicant set as the recipient. Your Email logo if defined is automatically added to the top of the email. At this point additional recipients or cc's can be added. Once sent, the letter will be stored, along with any attachments, in the applicants sent letters. The checkbox in the Sent column will be automatically checked. If this button is disabled it is because the applicant doesn't have an email address or email has not been configured by your system administrator.
	This will send an email to all applicants that have the inc(lude) checkbox ticked, have not already been sent a communication (Sent column ticked), and have an email address. The checkbox in the Sent column will be automatically checked if the email is successfully sent. This will take a little while if emailing lots of applicants.
	 This is a split button. If the top part of the button is clicked a dialog will be displayed enabling you to select a file to attach. If the bottom part of the button is clicked a drop down list will be displayed listing the currently available attachments. The relevant property's stored document or a document stored against the respective

	applicant/vendor can be attached when sending an email. Any number of attachments can be added.
	Prints the letter and, as the system assumes you will be posting this to the applicant, stores it in the applicants sent letters. The checkbox in the Sent column will be automatically checked.
	This will print a letter to all applicants that have the inc(lude) checkbox ticked, have not already been sent a communication (Sent column ticked). The checkbox in the Sent column will be automatically checked. This will take a little while if printing letters to lots of applicants.
	This generates a report of the list of applicants which can be printed. This is designed to be used as a reminder if you wish to send property particulars by post and need to select them later.
	This prints address labels for all applicants that have the inc(lude) checkbox ticked.
	<p>This will open the SMS Text Messaging Screen populated with the mail-merged letter. Once sent the letter will be stored in the applicants sent letters. Letters sent as text messages should be brief as the maximum content of each message is limited to 160 characters. If it is more than this it will be sent as multiple texts. The checkbox in the Sent column will be automatically checked. If this button is disabled it is because the applicant doesn't have a mobile or text messaging has not been configured by your system administrator.</p> <p> <i>Additional charges apply.</i></p>
	This will send a text message to all applicants that have the inc(lude) checkbox ticked, have not already been sent a communication (Sent column ticked), and have a mobile phone. The checkbox in the Sent column will be automatically checked if the text message is successfully sent. This will take a little while if texting lots of applicants.

5.12 Company Info Screen

This screen is displayed when Estate Agent Pro is run for the first time for you to input mandatory information about your company and branch.



Company Name	Tonbridge Estate Agents
Branch Name	Tonbridge
House Name/No	1
Street	High Street
Additional	
Locality	
Town	Tonbridge
County	Kent
Postcode	TN1 1ST
Country	UK
Telephone No	01892 111111
Fax No	01892 222222
Email	info@tonbridgeestateagents.co.uk

Continue

Complete all fields and then click on the **Continue** button to finish registration of the software.

The **Address** entered should be that of your branch and should be completed as you wish them to appear on your letter heads, property particulars, etc.

Company Name is limited to 60 characters.

Even if you only have one branch, please use the town you are in as the **Branch Name** as the first three characters of this are used as the first part of all property references. The branch name is limited to 30 characters.

5.13 Contacts Screen

Displays a list of all contact details for selected client including all associated contacts such as solicitor, estate agent, etc if relevant. There are also tabs on the screen for sales chasing, central notes and chain flow.

CONTACTS SCREEN

Home Administration **Contacts** Contact Sheet

Contacts Sales Chasing Central Notes Chain Print Contacts Display Options

The Old Barn, T... Contact Sheet

Details

Ask Price £895,000 Sale Price £850,000 Sale Agreed Date 01/10/2012

Property THE OLD BARN, TUNBRIDGE WELLS, KENT, TN2 5HS

Vendor

Name Mr Ken Randall 12 Brick Street Westminster London W13 7XR

Company

Number/Email	
07877 888888	
01892 565656	
020 7491 7777	Home
07872 123456	
krandall@hotmail.com	
01892 525448	Work

Vendors Solicitor

Name Mrs J Badger 8 Holtye Road Tunbridge Wells Kent TN2 6AJ

Company Badger & Partners

Number/Email	
01892 121212	
jbadger@badgersolicitors.co.uk	

Purchaser

Name Mr J Able 12 Gordons Road Tonbridge Kent TN9 9QF

Company



Number/Email	
jable@hotmail.com	
07787234674	
204	Home
0202789324	Work

© 2013 Pair Software LLP 24 August 2013 13:35

All contact details entered into Estate Agent Pro for the Vendor, the vendors solicitor, the purchaser, the purchasers solicitor and the purchasers estate agent is displayed.

12 Brick Street
Westminster
London
W13 7XR

The Vendor or Purchasers Client information can be edited from this screen by clicking on the button to the right of their address. See the [Client's Screen](#) for more information.

Clicking on the  button will open a screen to enable you to send text messages to whoever is detailed in the *Whom* column. This has to be configured and additional charges apply. See the [SMS Text Messaging Screen](#) for more information. Clicking on the  button will open the [Email Screen](#) enabling you to send an email. Both of these types of communication will be stored under Draft & Sent Communications of the applicant, vendor, solicitor or estate agent respectively. See the [Customer Communications Screen](#) for more information.

SALES CHASING TAB

Description	Vendor	Purchaser
Paid searches to Solicitor	31/08/2010	31/08/2010
Solicitor applied for deeds		
Filled in mortgage forms		31/08/2010
Paid survey fee		
Filled in fixtures forms		
Solicitor sent out contract		
Received sellers contract		
Local searches applied for		
Employee's reference received		
Credit references done		
Local searches in		
Survey done		
Received mortgage offer		
Booked for signing		
Purchaser aware deposit rules		
Signed Contract		

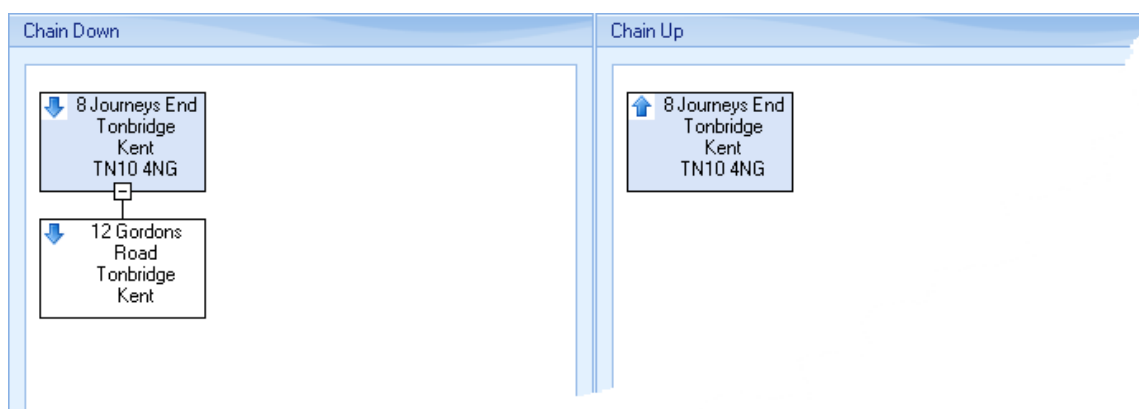
Shows the dates entered in the [Sales/Rent Status Screen](#). These are configurable by your system administrator.

CENTRAL NOTES

Date	Branch	Notes
31/08/2010	CRO	Mr Able has stated that he will proceed with the purchase as quickly as possible.

Details any central notes entered in the [Sales/Rent Status Screen](#).. These notes can be entered at any branch.

CHAIN FLOW TAB

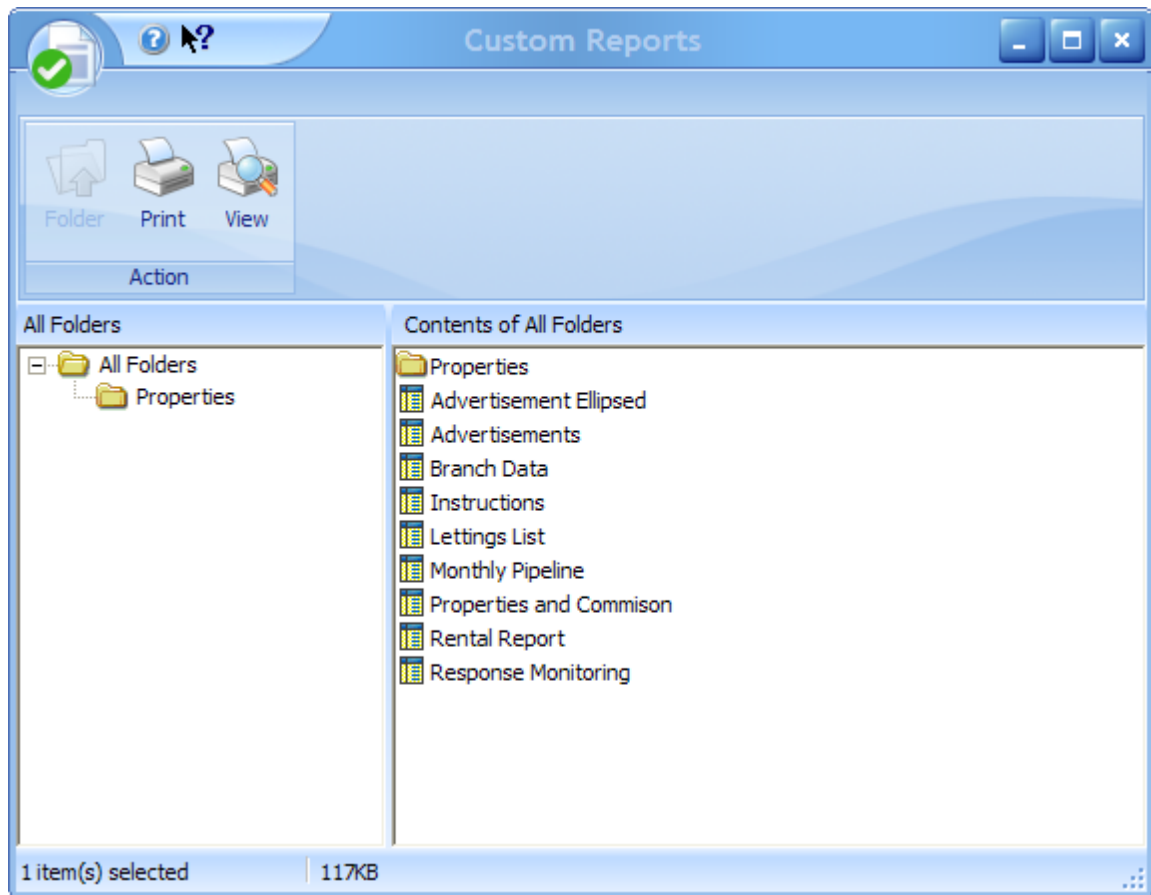


Displays both the up and down chains as entered in the [Chain Flow Screen](#)

5.14 Custom Reports Screen

The custom reports screen displays a list of reports for you to run on any data within the database. These will have either been written by yourselves or Estate Agent Pro Ltd for you (charges apply).

CUSTOM REPORTS SCREEN





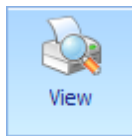
The list of folders is displayed on the left hand side and the list of available reports is listed on the right hand side.

Navigate to the folder you require by clicking the folder name then double click the report name to generate the report.

Custom reports can be printed, emailed or saved as PDF's.

RIBBON BAR

 Folder	Moves the selected folder up one level.
 Print	Prints the selected report.



Previews the selected report.

See the [Report Preview Screen](#) for more information.

5.15 Customer Communications Screen

Contains copies of all communications sent to an individual client including attachments sent by email. Communications can also be resent from here.

CUSTOMER COMMUNICATIONS SCREEN

The screenshot shows the 'CUSTOMER COMMUNICATIONS SCREEN' for 'Mr J Able'. The interface includes a top navigation bar with 'Home', 'Administration', and 'Communications' tabs. Below this is a toolbar with various icons for actions like Copy, Paste, Cut, Duplicate, Page Layout, Hyperlink, Image, Phrase, Attach, Email, Print, and Text. The main area is divided into two panes. The left pane displays a table of sent communications:

Date	Method	Description	User
16/01/2014	Email	Test	Ken
06/02/2014	Email	Blank Letter	Ken
09/05/2014	Email	Test	Ken
30/04/2015	Email	Applicant Match	Ken


The right pane shows the details of the selected communication, 'Applicant Match', dated 30th April 2015. It includes the 'Tonbridge Estate Agents' logo and contact information: 1 High Street, Tonbridge, Kent, TN9 1ST. The email body text reads: 'Dear Mr Able', 'NEW PROPERTIES', 'The following new properties have just come to market and, as this meets your criteria, we have forwarded these details to you.', 'The following properties match to your requirements:', and a list of properties including 'OFFERS ABOVE £895,000', 'The Old Barn, Tunbridge Wells, Kent, TN2 5HS', 'Grade II Listed Barn Conversion', '3 1/2 Acre Paddocks', and 'Superb Location'. The email is signed 'jable@hotmail.com'.

This screen can be broken down into 4 primary areas.

COMMUNICATIONS GRID

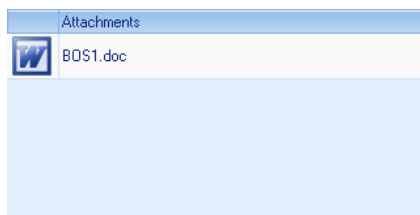
Date	Method	Description	User
Type : Sent			
28/08/2010	Email	Applicant Match	Ken
30/08/2010	Letter	Applicant Match	Ken
30/08/2010	Email	Applicant Response (Empty)	Ken

This grid contains a list of all communications sent to the client. It details the date sent, method used, description, the user that sent it and whether or not there was an attachment.

Communications can be deleted by using the  button on the navigator at the bottom left of the grid.

Clicking on an individual communication will display the contents of the communication and any attachments (applies to emails only).

ATTACHMENT LIST



This lists the attachments sent with an email communication.

The image in the left hand column indicates the type of attachment. Double clicking on the image will display the attachment using the applicable viewer.

SENT COMMUNICATION

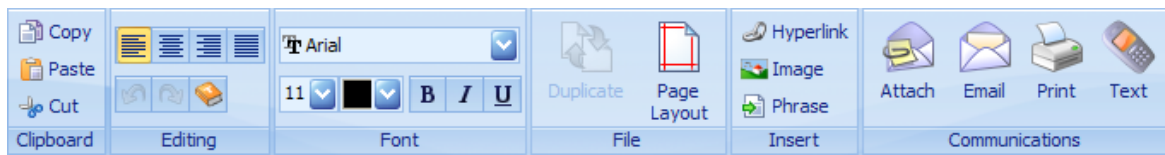


The sending/printing of these letters is covered in the [Ribbon Bar](#) section below.

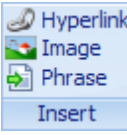

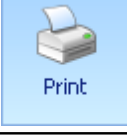
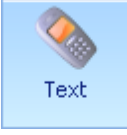



Spell checking, similar to Microsoft Word is used in all letters and certain other areas as appropriate. Misspelled words are underlined with a red squiggly line e.g. interest. Right mouse clicking on the word will provide a list of alternatives.

If the communication was sent by SMS or email the mobile number or email addresses sent to will be displayed beneath the communication (applicable from version 3.4.1.28 onwards).

RIBBON BAR

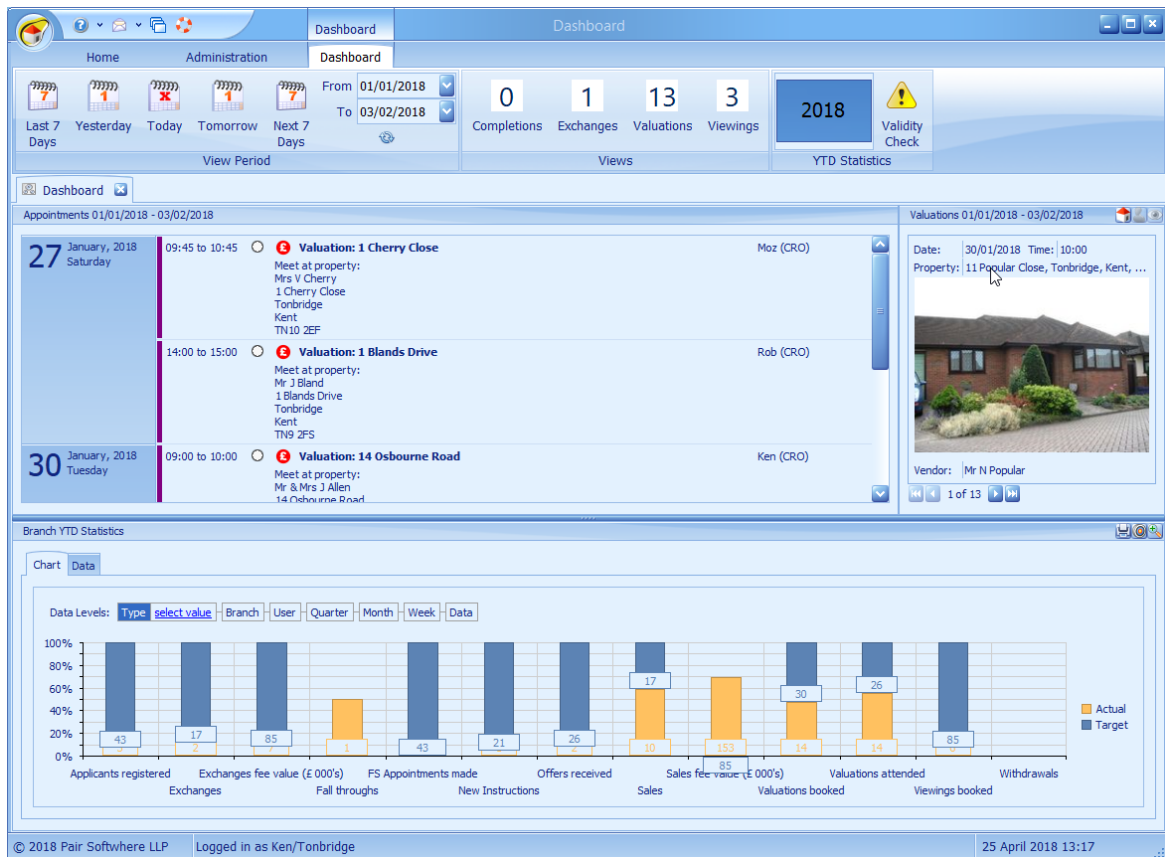


It is not the intention of this document to provide an explanation of standard functions found in the Clipboard, Editing and Font ribbon bar groups. The usage of the remaining buttons is detailed below. You cannot change letters that have been sent.

	<p>Hyperlinks, Images and predefined standard phrases can be inserted by clicking on the appropriate button. A dialog will be displayed to make the appropriate selection. When inserting hyperlinks, if you first select the text you wish to be displayed, for example 'Click here to see your property on our website', this text will be displayed instead of the hyperlink.. This is only available for draft letters.</p>
	<p>Opens the Email Screen populated with the letter along with any attachments that were originally included. Your Email logo if defined is automatically added to the top of the email. At this point additional recipients or cc's can be added. Once sent, the letter will be stored, along with any attachments, in the clients sent letters. If this button is disabled it is because the client doesn't have an email address or email has not been configured by your system administrator.</p>
	<p>Prints the draft letter.</p>
	<p>Open the SMS Text Messaging Screen populated with the letter. Once sent the letter will be stored in the clients sent letters. Letters sent as text messages should be brief as the maximum content of each message is limited to 160 characters. If it is more than this it will be sent as multiple texts. If this button is disabled it is because the client doesn't have a mobile or text messaging has not been configured by your system administrator.</p> <p> <i>Additional charges apply.</i></p>
	<p>Duplicates the currently selected communication as a draft letter which can then be edited and resent.</p>
	<p>Opens the page layout dialog where you can configure paper type, margins, etc.</p>

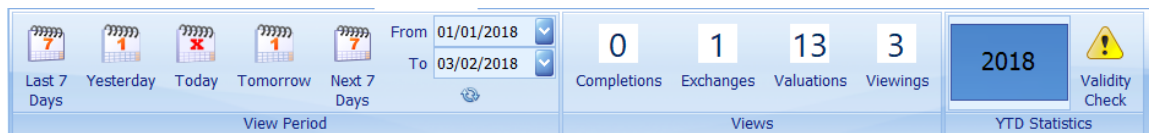
5.16 Dashboard Screen

The dashboard screen consists of two different areas, top and bottom, and provides 1) a summary of all exchanges, completions, viewings, valuations and appointments that are due today and for previous/future periods up to 7 days and 2) year to date statistics of targets v actual's which can be configured both generally and on on a per user basis. Statistics for previous years can also be displayed.



RIBBON

The dates displayed can be toggled by means of the buttons on the ribbon.



The number of completions, exchanges, valuations and viewings are shown for each period selected. Completions and exchanges are based on the anticipated dates defined in the [Sales/Rent Status Screen](#).

The view period, including appointments defaults to today but can be for any of the periods listed. Alternatively a date range can be selected as shown above.

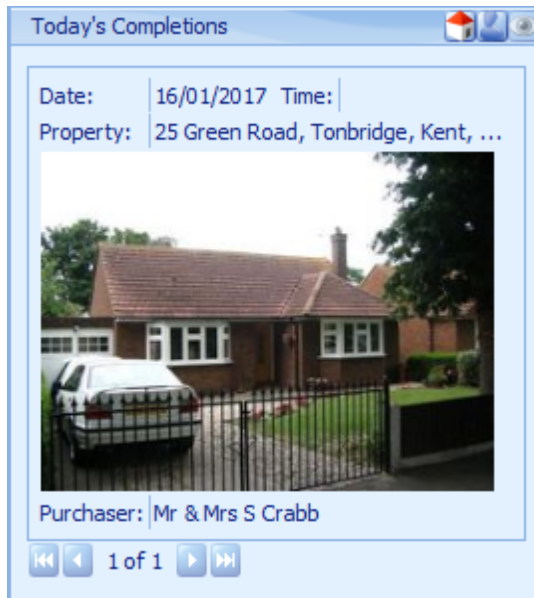
The statistics default to the current year to date but previous years can be displayed by scrolling the year in the YTD Statistics group.




The Validity Check button opens the [Dashboard Validity Check Screen](#) which displays a list of

warnings that will account for any missing data in the YTD Statistics. This button is only enabled for those users with full admin access rights.

VIEW

Clicking on any of the views in the centre panel of the ribbon will show the respective view in the right hand details box. If there is more than one property to be displayed in each area they can be scrolled by means of the navigator.



The associated property , applicant  or viewing , if applicable, can be displayed by clicking on the corresponding button.

APPOINTMENTS

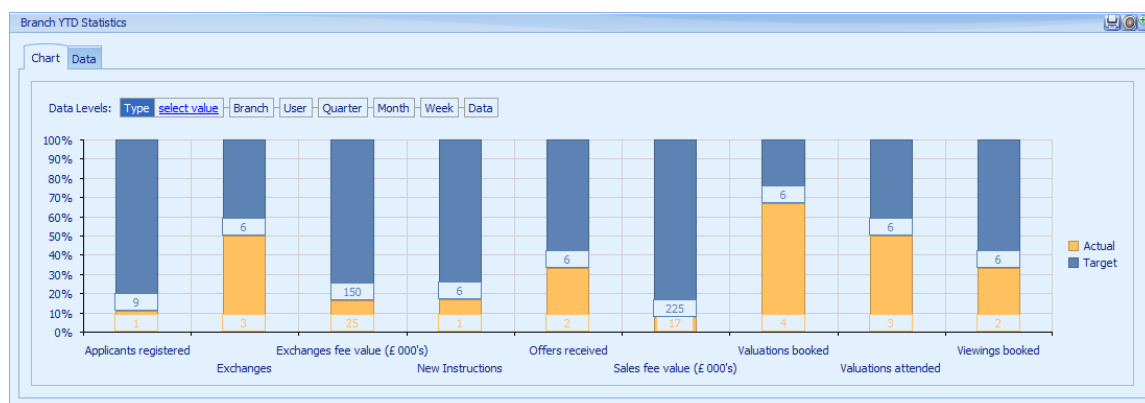
The appointments are displayed for the period selected. The first day is shown and subsequent days can be viewed by scrolling to the right.



The details of appointments can be viewed by double clicking the appointment but cannot be changed from this screen. Appointments are discussed in more detail in the [Diary Screen](#).

BRANCH YTD STATISTICS

Statistics shown here are always year-to-date and do not alter when periods are changed.



The initial view shows all YTD actual's versus target by percentage.

All data is based on values entered against properties, etc. If a property is deleted then the data will be lost. Archiving a property is fine.

Each user can be configured in admin separately. The following items can be configured:

Show Dashboard Whether or not this screen should be automatically displayed each time EAP is run.

Include in Targets


Whether to include this user in YTD statistics and the generation of targets. This would typically be switched off for administrative staff.

Only Own Stats Whether or not to show other users statistics.

Show All Branches Whether or not to show statistics for all branches (multi branch companies only).

Default View Initial filter to be applied to the chart. This can be Current Year, Quarter, Month or Week. The default is for the current year (YTD).

Monthly targets can be defined for individual users for each of these values by your system administrator. The monthly targets are then used to calculate weekly, quarterly and annual targets on a pro-rata basis. Weekly targets are set based on the number of weeks in the month.

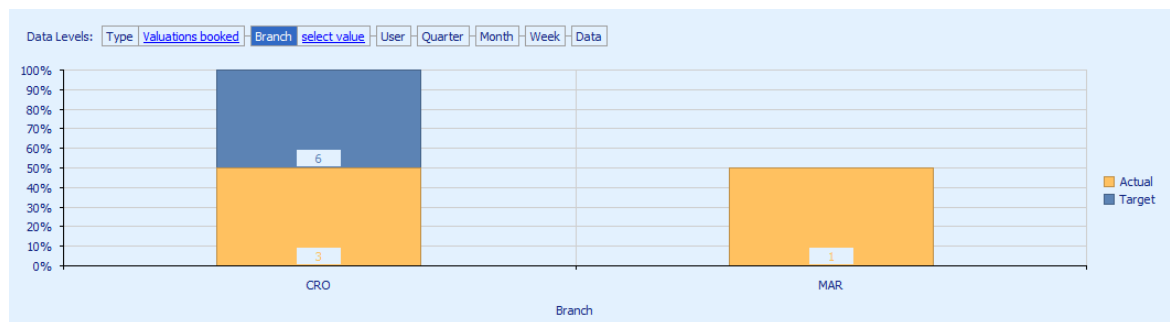
There can be different monthly targets for different periods throughout the year. The two different views can be toggled on by clicking on the  button. If no targets have been defined then this button will be disabled.

Values are assigned based on the following:

Target	Date Used	Individual
Applicants Registered	Registration date	Negotiator
Exchanges	Exchange date	Sales Negotiator
Fall Throughs	Fall Through date	Sales Negotiator
FS Referrals	Date referral entered	Individual who entered it
Instructions	Instruction date	Valuer

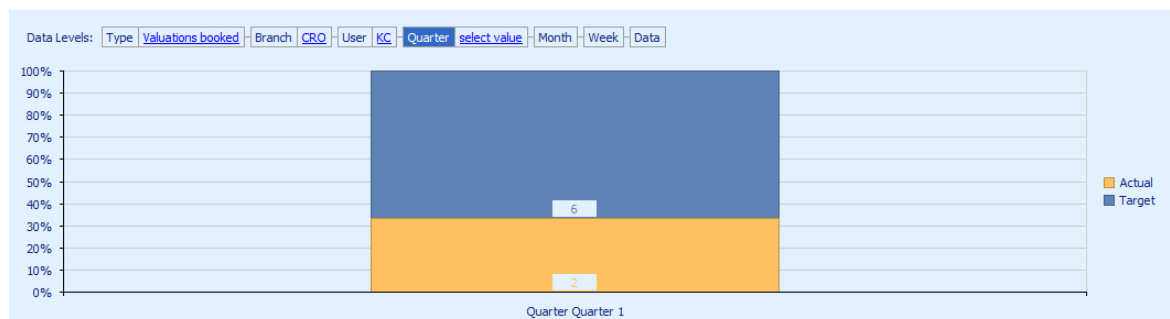
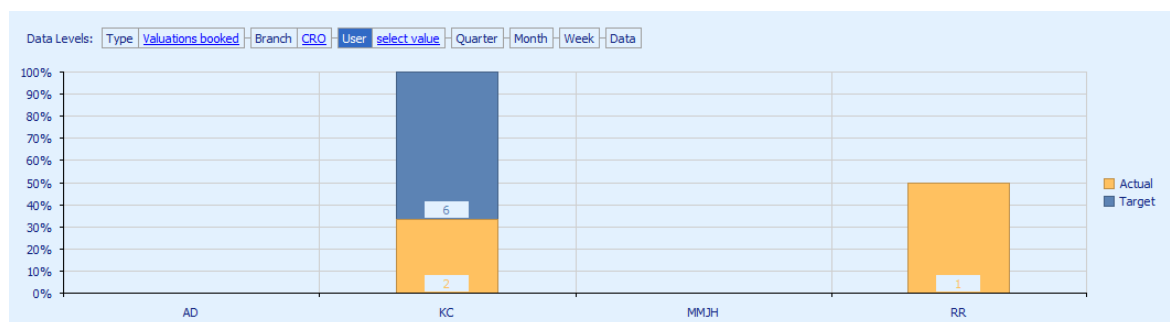
Target	Date Used	Individual
Offers	Offer date	Negotiator
Sales	Sale agreed date	Sales Negotiator
Valuations Booked	Date valuation entered	Negotiator
Valuations Attended	Valuation date	Valuer
Viewings Booked	Date viewing entered	Individual who entered it
Withdrawals	Withdrawn date	Valuer

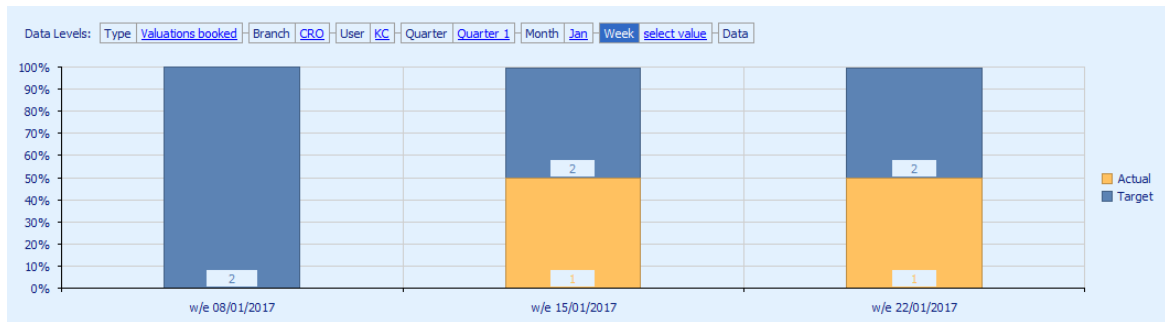
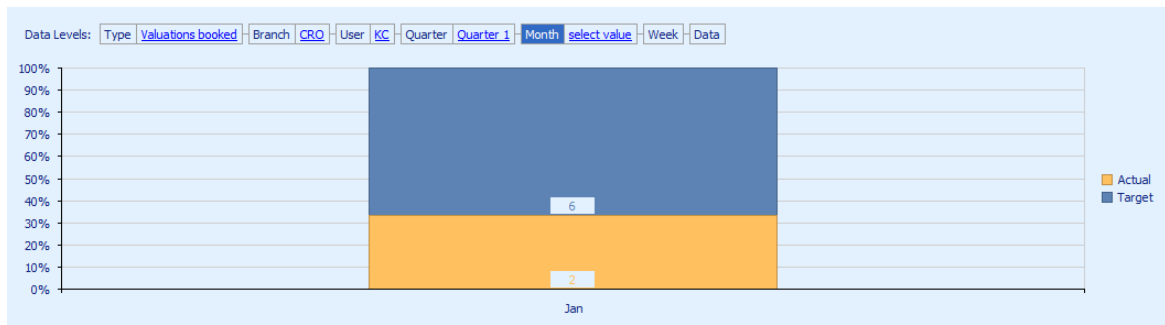
The chart can be drilled down through the levels just by clicking on any one of the bars.



In this instance we can see that user CRO branch has achieved just over 50% of its valuations booked target so far this year, with 3 actual bookings against a target of 7.

Drilling further down in turn will show the following charts.





Obviously this data is fictitious and does not include a full set of data. You can go back up a level by right mouse clicking on the chart.

As well as displaying this data graphically it can also be shown in tabular mode by clicking on the **Data** tab.

Type	CRO			MAR			Grand Total		
	Act	Tgt	% Tgt	Act	Tgt	% Tgt	Act	Tgt	% Tgt
Applicants registered	1.00	9.00	11.11%	0.00	0.00		1.00	9.00	11.11%
Exchanges	3.00	6.00	50.00%	0.00	0.00		3.00	6.00	50.00%
Exchanges fee value (£ 000's)	24.82	150.00	16.55%	0.00	0.00		24.82	150.00	16.55%
New Instructions	1.00	6.00	16.67%	0.00	0.00		1.00	6.00	16.67%
Offers received	2.00	6.00	33.33%	0.00	0.00		2.00	6.00	33.33%
Sales fee value (£ 000's)	17.01	225.00	7.56%	0.00	0.00		17.01	225.00	7.56%
Valuations booked	3.00	6.00	50.00%	1.00	0.00		4.00	6.00	66.67%
Valuations attended	2.00	6.00	33.33%	1.00	0.00		3.00	6.00	50.00%
Viewings booked	2.00	6.00	33.33%	0.00	0.00		2.00	6.00	33.33%


If there is any data in the unknown column it means that a negotiator has either not been set for the property, the negotiator has been deleted from the system or they have been set to not be included in targets.

Each branch can be expanded to show more detailed information.

Type	CRO			KC			MMJH			RR			CRO Total		
	Act	Tgt	% Tgt	Act	Tgt	% Tgt	Act	Tgt	% Tgt	Act	Tgt	% Tgt	Act	Tgt	% Tgt
Applicants registered	0.00	0.00		1.00	9.00	11.11%	0.00	0.00		0.00	0.00		1.00	9.00	11.11%
Exchanges	1.00	0.00		2.00	6.00	33.33%	0.00	0.00		0.00	0.00		3.00	6.00	50.00%
Exchanges fee value (£ 000's)	5.00	0.00		19.82	150.00	13.22%	0.00	0.00		0.00	0.00		24.82	150.00	16.55%
New Instructions	0.00	0.00		1.00	6.00	16.67%	0.00	0.00		0.00	0.00		1.00	6.00	16.67%
Offers received	0.00	0.00		2.00	6.00	33.33%	0.00	0.00		0.00	0.00		2.00	6.00	33.33%
Sales fee value (£ 000's)	0.00	0.00		17.01	225.00	7.56%	0.00	0.00		0.00	0.00		17.01	225.00	7.56%
Valuations booked	0.00	0.00		2.00	6.00	33.33%	0.00	0.00		1.00	0.00		3.00	6.00	50.00%
Valuations attended	0.00	0.00		0.00	6.00		1.00	0.00		1.00	0.00		2.00	6.00	33.33%
Viewings booked	0.00	0.00		1.00	6.00	16.67%	0.00	0.00		1.00	0.00		2.00	6.00	33.33%

And also each target can be expanded to show more detailed information.

				CRO												CRO Total		
Type	Quarter	Month	Week	AD			KC			MMJH			RR			Act	Tgt	% Tgt
				Act	Tgt	% Tgt	Act	Tgt	% Tgt	Act	Tgt	% Tgt	Act	Tgt	% Tgt	Act	Tgt	% Tgt
Applicants registered				0.00	0.00		1.00	9.00	11.11%	0.00	0.00		0.00	0.00		1.00	9.00	11.11%
Exchanges				1.00	0.00		2.00	6.00	33.33%	0.00	0.00		0.00	0.00		3.00	6.00	50.00%
Exchanges fee value (£ 000's)				5.00	0.00		19.82	150.00	13.22%	0.00	0.00		0.00	0.00		24.82	150.00	16.55%
New Instructions				0.00	0.00		1.00	6.00	16.67%	0.00	0.00		0.00	0.00		1.00	6.00	16.67%
Offers received				0.00	0.00		2.00	6.00	33.33%	0.00	0.00		0.00	0.00		2.00	6.00	33.33%
Sales fee value (£ 000's)				0.00	0.00		17.01	225.00	7.56%	0.00	0.00		0.00	0.00		17.01	225.00	7.56%
Valuations booked	Quarter 1	Jan	w/e 08/01/2017	0.00	0.00		0.00	2.00		0.00	0.00		0.00	0.00		0.00	2.00	
			w/e 15/01/2017	0.00	0.00		1.00	2.00	50.00%	0.00	0.00		0.00	0.00		1.00	2.00	50.00%
			w/e 22/01/2017	0.00	0.00		1.00	2.00	50.00%	0.00	0.00		1.00	0.00		2.00	2.00	00.00%
		Jan Total		0.00	0.00		2.00	6.00	33.33%	0.00	0.00		1.00	0.00		3.00	6.00	50.00%
		Valuations attended			0.00	0.00		0.00	6.00		1.00	0.00		1.00	0.00		2.00	6.00
Viewings booked			0.00	0.00		1.00	6.00	16.67%	0.00	0.00		1.00	0.00		2.00	6.00	33.33%	

The chart or the data can be printed by clicking on the  button in the group header. Whichever tab is focused will be opened in a preview screen for printing or saving as a PDF.

5.17 Diary Screen

The diary screen contains details of appointments made for all members of staff and is very similar in design and operation to the diary in Microsoft Outlook in fact, it can be synchronised with Microsoft Outlook.

DIARY SCREEN

The screenshot displays the 'Diary Screen' interface. At the top, there's a navigation bar with 'Home', 'Administration', and 'Diary' tabs. Below this is a toolbar with icons for 'Property', 'Applicant', 'Group By', 'Visible Users', 'Print', 'View', 'Reload Diary', and 'Outlook'. The main area shows a calendar for 20 August 2012, with columns for staff members: Moz (Tonbridge), Rob (Tonbridge), Ken (Tonbridge), and Clive (Tonbridge). Moz has a yellow background. Rob has a blue background with a red icon and text: 'Valuation: 5 Musgrove Road', 'Meet at property: Mr & Mrs M Musgrove'. Ken has a green background with a red icon and text: 'Mr J Able: 12, Gordons Road, TN9 9QF', 'See viewing for'. Clive has a grey background with a red icon and text: 'Holiday'. The left sidebar shows time slots from 11:00 to 14:30. The right sidebar shows a calendar for August 2012 and a tasks list with 'Buy Mum's card'. The bottom status bar shows '© 2012 Pair Softwhere LLP', '933 x 665', and '20 August 2012 11:52'.

This screen can be broken down into 4 logical areas.

APPOINTMENTS

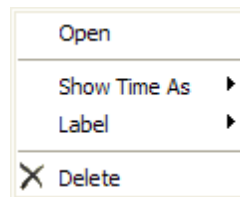
20 August			
	Moz (Tonbridge)	Rob (Tonbridge)	Ken (Tonbridge)
45			
11 00			
15			
30			
45			
12 00			
15			
30			
45			
13 00			
15			
30			

£ Valuation: 5 Musgrove Road
Meet at property:
Mr & Mrs M Musgrove

Dentist Appointment
Should be back by 3pm but to be on the safe side don't book

A column can be shown for each member off staff. When Estate Agent Pro is run it always defaults to showing the diary of the user ID you logged in with.

An existing diary entry can either be opened by right mouse clicking on an appointment and selecting Open from the drop down menu or by simply double clicking on the appointment



In either case the following dialog will be displayed:

Event - Accompanied Viewing Mr J Able

Subject: Accompanied Viewing Mr J Able

Location: Label: ☐ None

Start time: 04/01/2011 12:00 ☐ All day event

End time: 04/01/2011 13:00

Resource: Ken (Tonbridge)

☐ Reminder: 15 minutes Show time as: ☒ Out of office

Meet at property
Mr Ken Randall
The Old Barn, Tunbridge Wells, Kent, TN4 0HY

OK Cancel Delete Recurrence

Any of the fields can be changed here including the setting and cancelling of reminders. Appointments can be all day events or recurring events. for example, a new event can be added by double clicking on blank area of the screen

Event - Holiday

Subject: Holiday

Location: Label: ☐ Vacation

Start time: 04/01/2011 ☒ All day event

End time: 07/01/2011

Resource: Clive (Tonbridge)

☒ Reminder: 15 minutes Show time as: ☒ Out of office

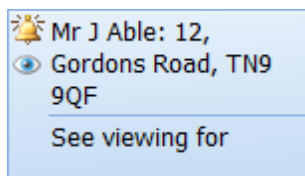
Will be at home if needed.

OK Cancel Delete Recurrence

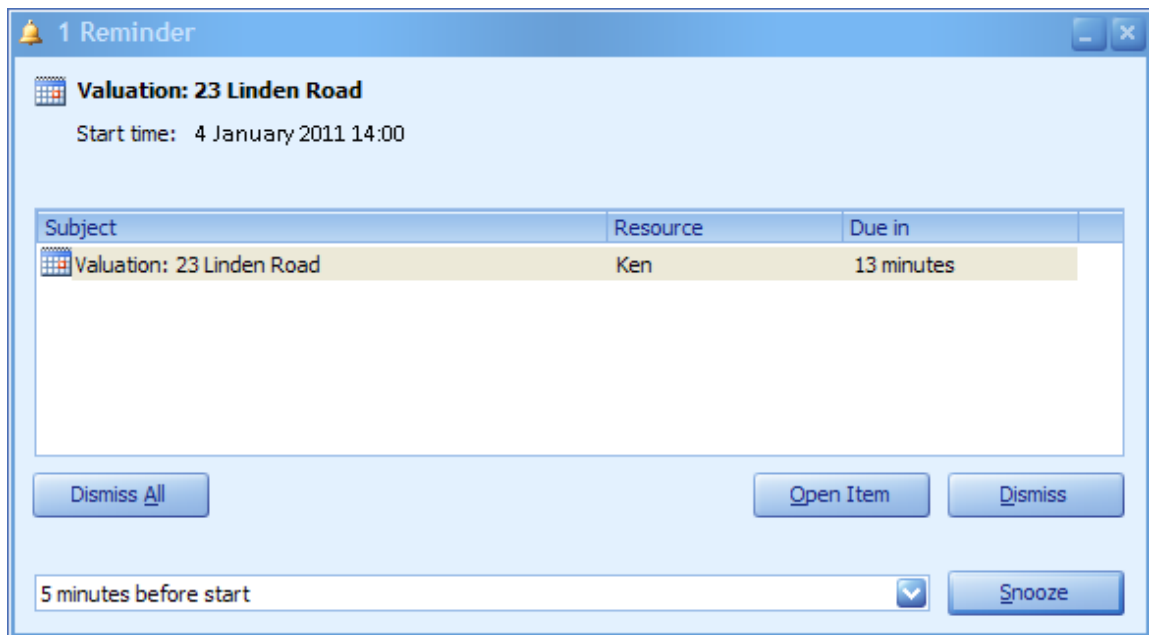
Saving this diary entry will for the next four days display the following:



Reminders can be set for a period ranging from 5 minutes to 2 weeks before the event is due. When an alarm is active an alarm bell will be shown in the upper left hand corner of the appointment.



When this time is reached a reminder will be displayed:



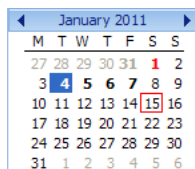
You then have the option to snooze or dismiss the appointment.

Appointments can be dragged and dropped from one time to another or from one user to another which will change the appointment accordingly.



If you change an appointment that is for a valuation or viewing the corresponding date/time of the valuation/viewing will also be changed.

DATE NAVIGATOR

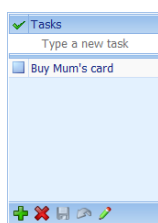


The navigator is used to select the date you wish to view. The current date is indicated as shown. If there is an appointment for any users you are viewing the corresponding date will be shown in bold. Bank holidays, which are editable by your system administrator are shown in red.



Multiple dates can be selected on the date navigator by clicking on the first date required and then, without releasing the mouse, selecting contiguous dates.


TASK LIST



The tasks shown are for the date selected on the date navigator. New tasks can be added by either clicking on the **Type a new task** area or by using the navigation bar at the bottom left hand side of the task grid.

See [How do I use the navigation buttons?](#) for further help on the navigation bar.

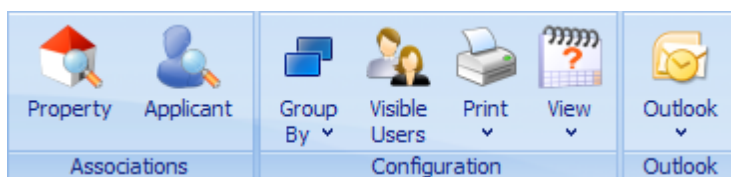
When a new task is added the [Task Screen](#) will be displayed.

Tasks can be added for any member of staff. The selected task can also be edited by clicking on the  button.


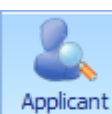



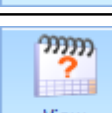

Init Tasks	
Type a new task	
290b Stratford Road, Spa	
KC	Do something irr
The Old Barn, Tunbridge	
KC	Call me urgently
Unassigned	
KC	Call Fred
KC	Call Mr Jones
KC	xxxxxxxx
KC	Added a dated n
KC	Test

If properties are assigned to the tasks the list will be grouped by properties.

RIBBON BAR



The buttons on the ribbon bar can be used as follows:

	If the diary event that is clicked on was entered automatically from another screen such as an accompanied viewing or a valuation this button will be enabled and clicking on it will open the Properties Screen focused to the associated property.
	If the diary event that is clicked on was entered automatically from another screen such as an accompanied viewing or a dated note this button will be enabled and clicking on it will open the Applicants Screen focused to the associated applicant.
	This drop down allows you to group the display by date, users or no grouping. This only makes sense if multiple users/dates are being displayed at the same time. Multiple dates can be selected on the date navigator by clicking on the first date required and then, without releasing the mouse, selecting contiguous dates.
	When Estate agent pro is run it defaults to just showing the logged in users diary. Clicking this button will display a list of users that can be viewed.
	This drop down allows you to print different views of the diary such as weekly, monthly, etc.
	This drop down allows you to switch the current view between day, week, month, etc.
	This drop down provides synchronisation options with Microsoft Outlook. We recommend that if you use this, which can be slow if there are lots of diary entries, that you only export to Outlook. Only the logged in user's entries will be exported. This should be used with caution!

5.18 Event History Screen

This screen is available from both the Applicants and Properties screens and displays all events associated with the selected applicant or property/vendor as applicable.




Date	Time	Initials	Type	Comment
30/07/2010	13:00	KAR	Viewing	Mr & Mrs J Able Liked the property and that it had a bathroom down stairs. Just
18/08/2010	02:00	KAR	Viewing	Mr & Mrs J Able
26/08/2010	16:22	KAR	Match	Mr & Mrs J Able (Tonbridge)
27/08/2010	13:14	KAR	Viewing	Mr & Mrs J Able Vendor Informed of viewing on 30/07/2010 at 13:00:00
27/08/2010	13:18	KAR	Offer	Mr & Mrs J Able (Tonbridge) Offer made of £160,000
27/08/2010	13:18	KAR	Status	Property status changed to "Under Offer"
31/08/2010	09:52	KAR	Status	Property status changed to "Sale Agreed"
31/08/2010	09:54	KAR	Purchaser	Vendor Paid searches to Solicitor
31/08/2010	09:54	KAR	Purchaser	Purchaser Paid searches to Solicitor
31/08/2010	09:54	KAR	Purchaser	Purchaser Paid searches to Solicitor Mr & Mrs J Able (Tonbridge)
31/08/2010	09:54	KAR	Purchaser	Vendor Solicitor applied for deeds
31/08/2010	09:54	KAR	Purchaser	Purchaser Solicitor applied for deeds
31/08/2010	09:54	KAR	Purchaser	Purchaser Solicitor applied for deeds Mr & Mrs J Able (Tonbridge)
31/08/2010	09:54	KAR	Purchaser	Vendor Filled in mortgage forms
31/08/2010	09:54	KAR	Purchaser	Purchaser Filled in mortgage forms
31/08/2010	09:54	KAR	Purchaser	Purchaser Filled in mortgage forms Mr & Mrs J Able (Tonbridge)

16 Events

Filters can be applied to certain columns by clicking on the  button.

Click on the  button to print the grid.

 This grid has the ability of being grouped and filtered by columns. See [How do I use grid column grouping and filtering?](#) for further information.

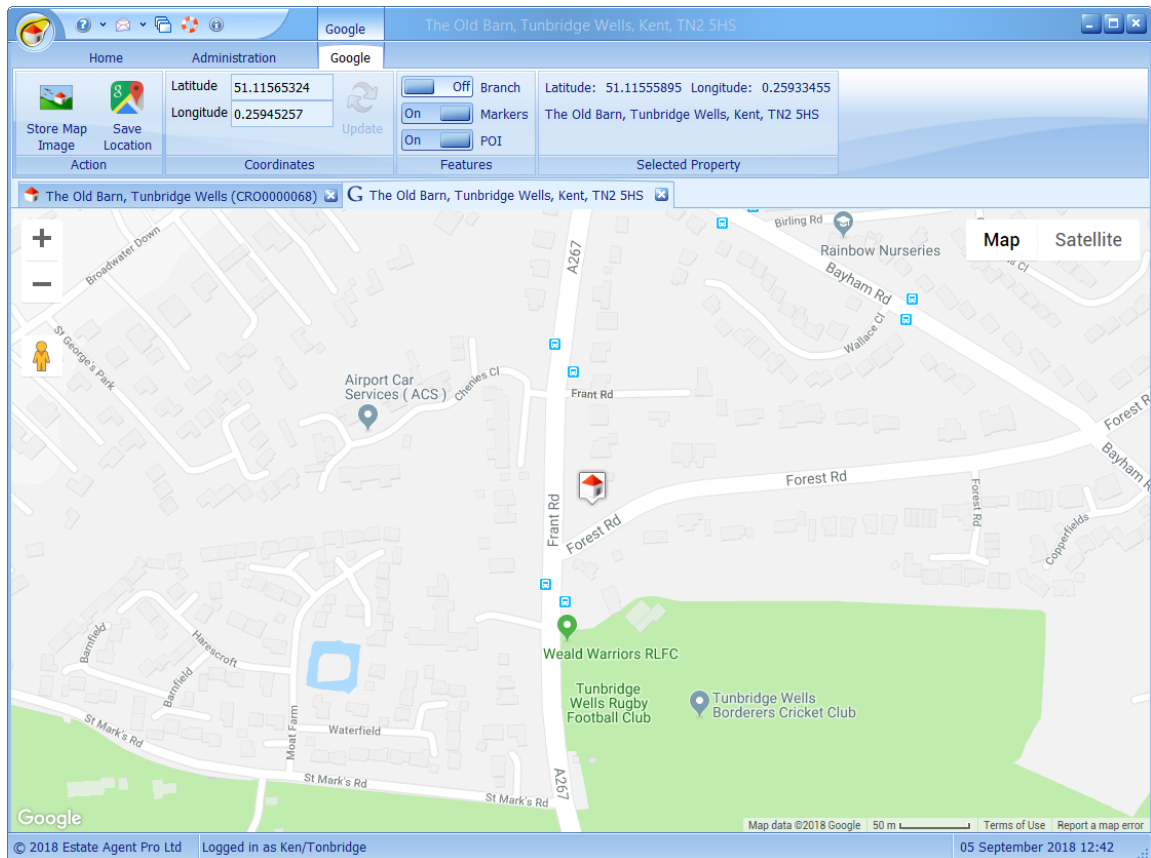
5.19 Google Map Screen

This interface uses the Google Maps API and will show the property that was active when this screen was invoked. This has been updated to use the new Microsoft Edge interface.



The locations shown in this help file address wise will not match the location of the map as, whilst the post codes are valid, all addresses used are fictitious.

GOOGLE MAP SCREEN

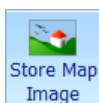


The location of the selected property is displayed in the toolbar.

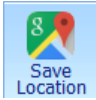


The latitude and longitude of each property is retrieved from Google when a property is added or its address is amended. If this is not available then the property cannot be displayed.

The buttons on the toolbar function as follows:



If the Google Maps interface was opened from the properties screen you will have the option to store the map displayed by clicking on this button. Before storing the image you can first of all zoom to any level you require. Multiple images can be stored.



If the location has been changed (by dragging the image) this button will be enabled and clicking on it will save the properties new location.



You can enter the Latitude and Longitude of the property directly if you have this information and then click on the **Update** button. The property marker will be moved to the new location and the map will be updated. This does not save the location



Adds a marker showing your branch location.

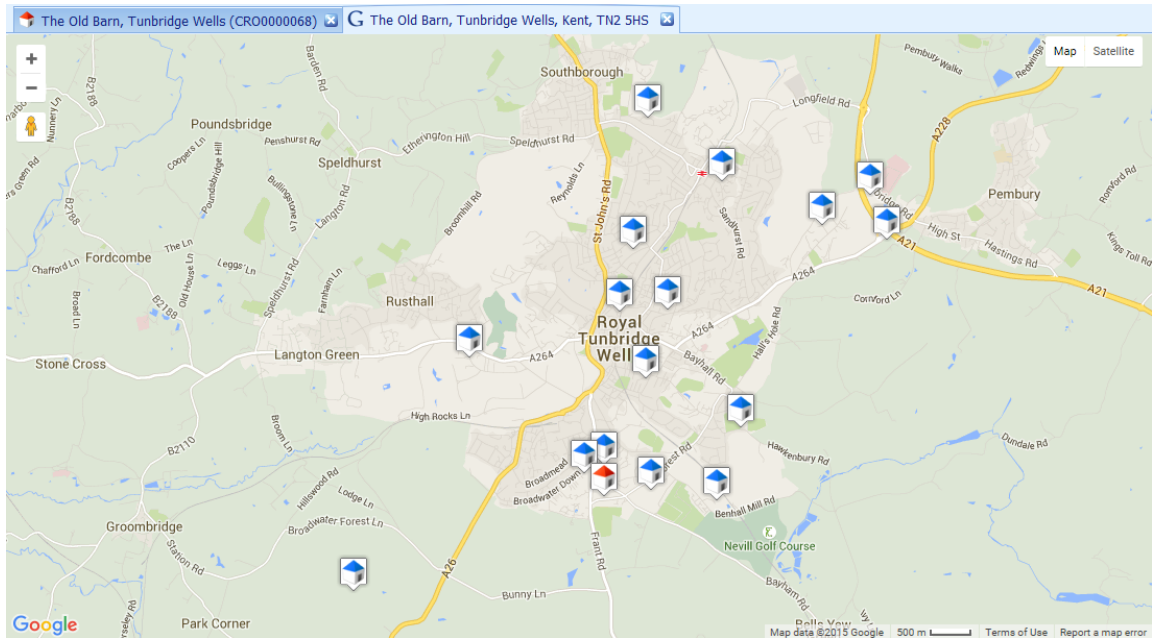
Turns on/off the display of markers.


Turns on/off points of interest.

If opened from the Properties screen the selected property can be moved, or the new coordinates entered directly, if it is not in the correct position. You will be prompted whether to save it or not when you close this screen. Changing the location has no impact on the address entered.

MULTIPLE PROPERTIES

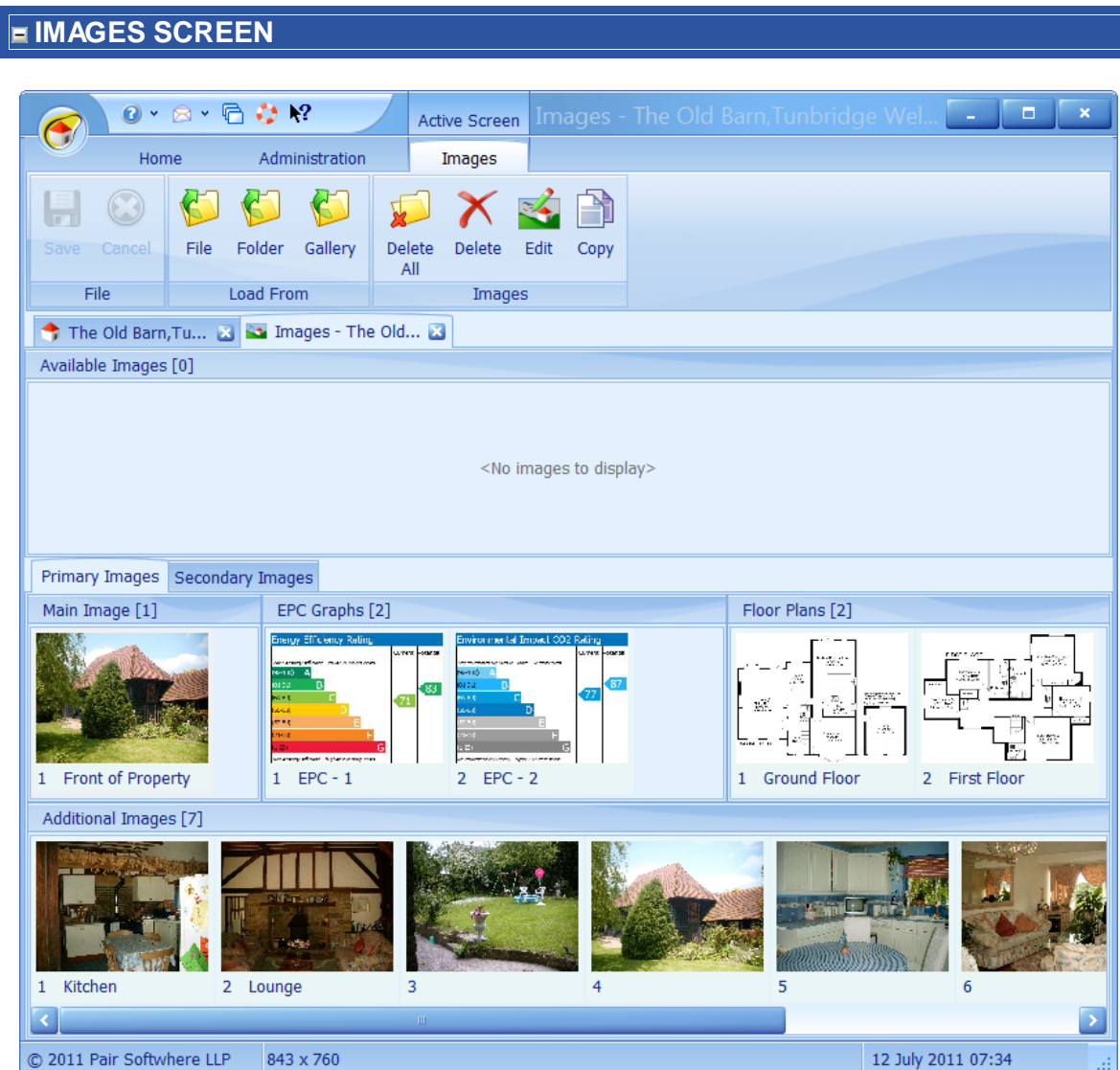
If more than one property was passed to the Google Maps screen then they will be zoomed to fit. The property that was selected when you opened this screen will be shown as a red house, the other properties will be blue.



 The usage of Google Maps is in accordance with the ["Terms of Use"](#) link displayed at the bottom right hand corner of the map. The ["Terms of Use"](#) agreement is between yourselves and Google Maps. The interface to Google Maps could be changed, or removed, or made chargeable at the discretion of Google Maps. Estate Agent Pro Ltd will try to keep this interface available but cannot guarantee it.

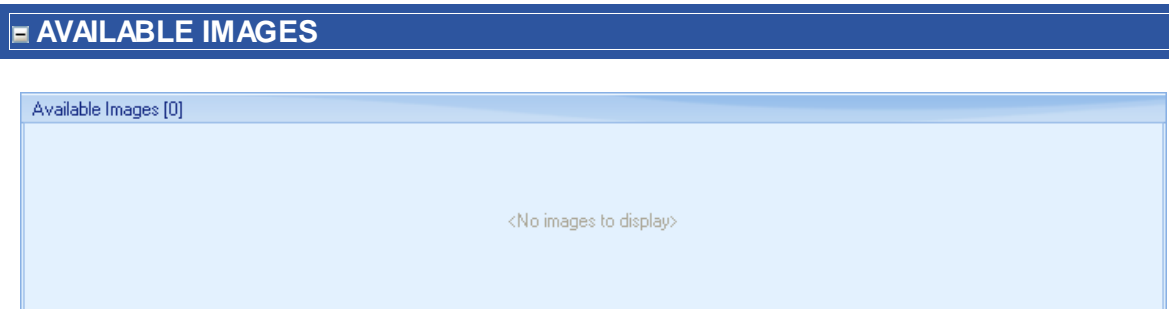
5.20 Images Screen

This is where all images related to the property can be loaded. They can also be edited, re-sized, etc.



See [How do I add images to a property?](#) for further information.

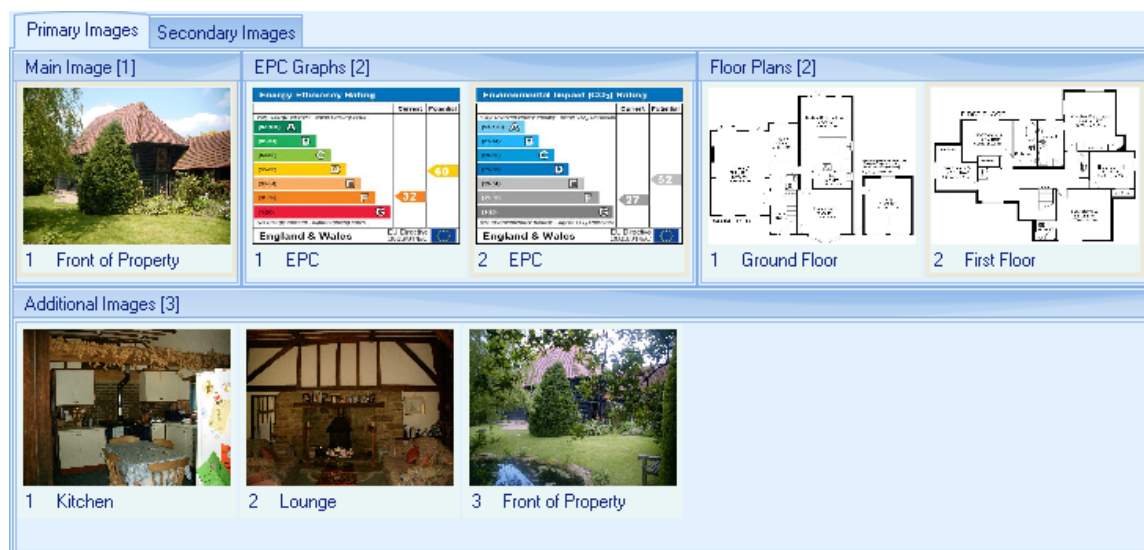
This screen can be broken down into three primary areas.



Available images is initially empty. This area can be populated with images from various locations (see the Ribbon bar below for examples) and then assigned to any other area by dragging and

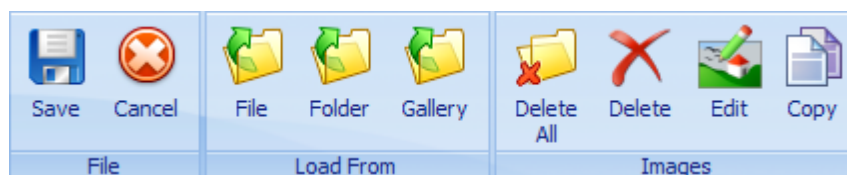
dropping.

PRIMARY IMAGES












Images can be dragged and dropped between any one area and another. Captions can be added by clicking into the caption box. The Secondary Images tab functions in the same way and has areas for Aerial Photo's, Street Maps and Other Images.

RIBBON BAR



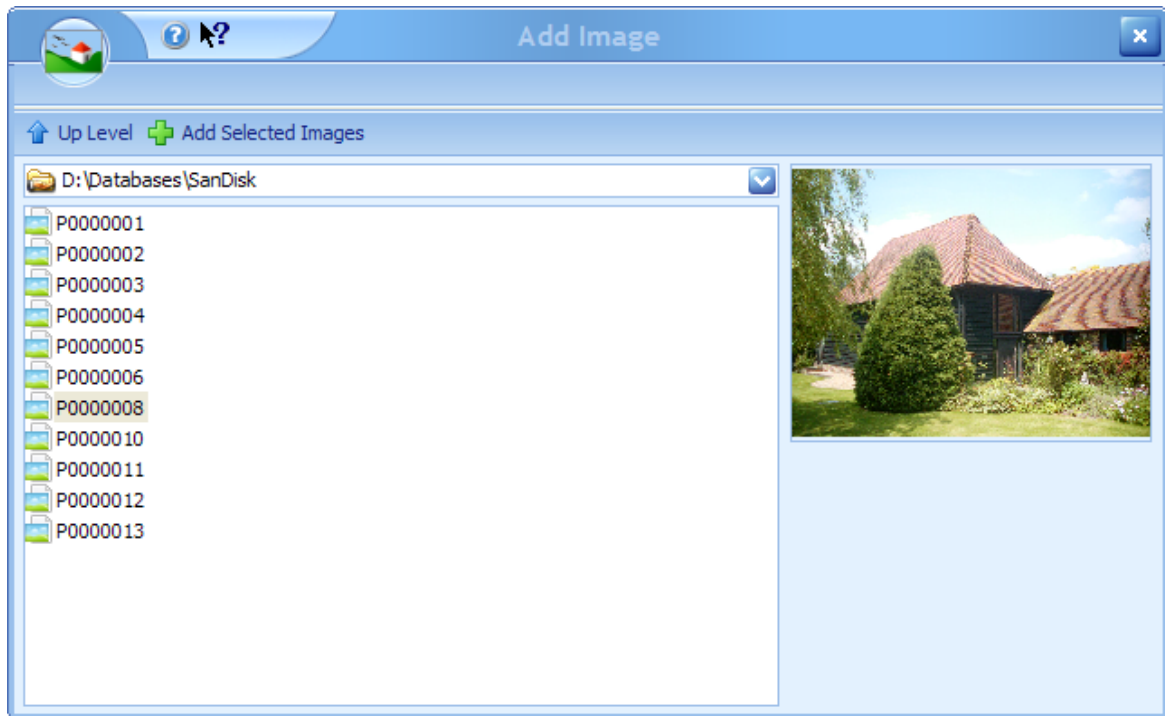
The following buttons are available on the ribbon bar.

	Closes the images screen saving any changes made to the images.
	Closes the images screen discarding any changes made to the images.
	Opens a dialog enabling you to choose images to insert into Available Images. See the Add Image Screen for more information.
	Opens a dialog enabling you to choose a folder to load all images from into Available Images. The location of this folder can be predefined by your system administrator. This would typically be used to load images from a digital camera.

 Gallery	<p>Opens a dialog enabling you to load the contents of a pre-saved gallery. Galleries can also be saved and deleted from within this dialog.</p> <p>See the Gallery Screen for more information.</p>
 Delete All	<p>Deletes all images in the active image section e.g. 'Available Images' or 'Floor Plans'.</p>
 Delete	<p>Deletes the selected image.</p>
 Edit	<p>Opens the internal image editor where images can be resized, brightened, edited, etc.</p> <p>See the Images Editor Screen for further information.</p>
 Copy	<p>Copies the selected image to the clipboard.</p>



5.20.1 Add Image Screen

This screen enables you to add any image and is primarily used from the [Images Screen](#).

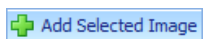


Only files that are images will be displayed.

The directory used defaults to that defined by your system administrator but can be changed by clicking on the drop down button on the

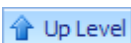
 D:\Databases\SanDisk  control.

Selecting an image file, in this example P0000008, will display the image as shown.

Click on  to add the image. When used from the image screen multiple images can be selected.

Repeat until you have loaded all images and then close the screen.

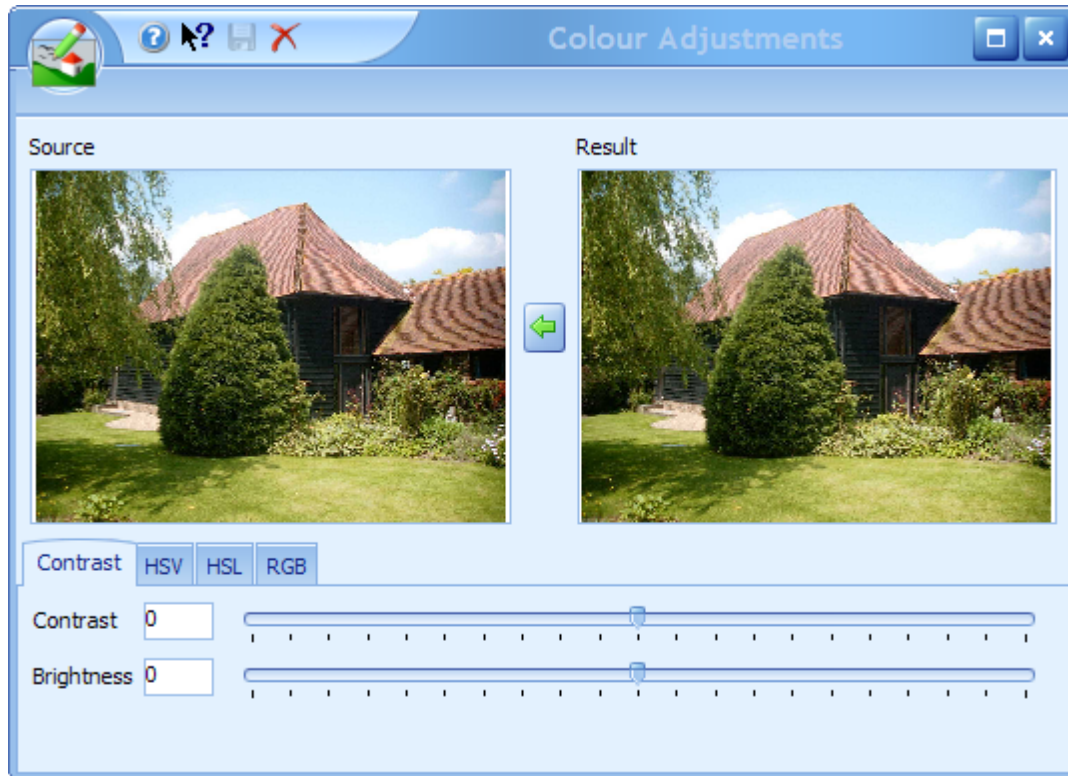
If you only wish to add one image this can be done in one action by double clicking on the filename.

Click on the  to go to the parent directory.

5.20.2 Colour Adjustment Screen

Allows you to change the colour of the image by various methods.



COLOUR ADJUSTMENTS SCREEN



The colour of the image can be adjusted by using the following tabs.

Contrast	Contrast and brightness.
HSV	Hue, saturation and value.
HSL	Hue, saturation and luminosity.
RGB	Red, green and blue.

It is not important to understand the meaning of these terms. The best way to learn is to experiment with using the controls.

Changes will not be made to the existing image until you click on the  button to replace the original source image with the result of your adjustments, and also click on the  button which will replace it's existing image and close this screen.

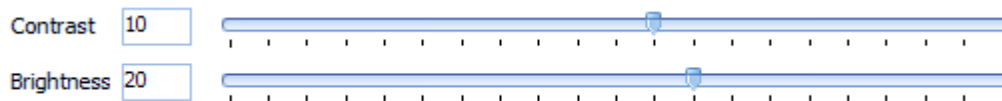
An example of using these tabs is shown below.

EXAMPLE



We have an internal photograph that we wish to back a bit brighter.



Moving the slider with the mouse as shown will adjust the image on the right interactively:



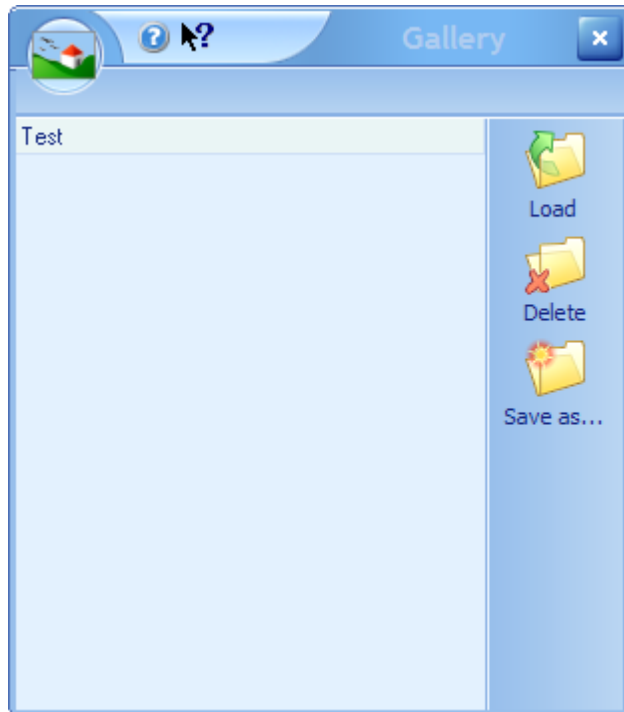
You could also use any of the other tabs as well.

When you are happy with your adjustments click on the  button to replace the original source image with the result of your adjustments, and then click on the  button which will replace save the changes and close this screen.




5.20.3 Gallery Screen

Available images on the [Images Screen](#) can be loaded, saved or deleted using this screen.

GALLERY SCREEN



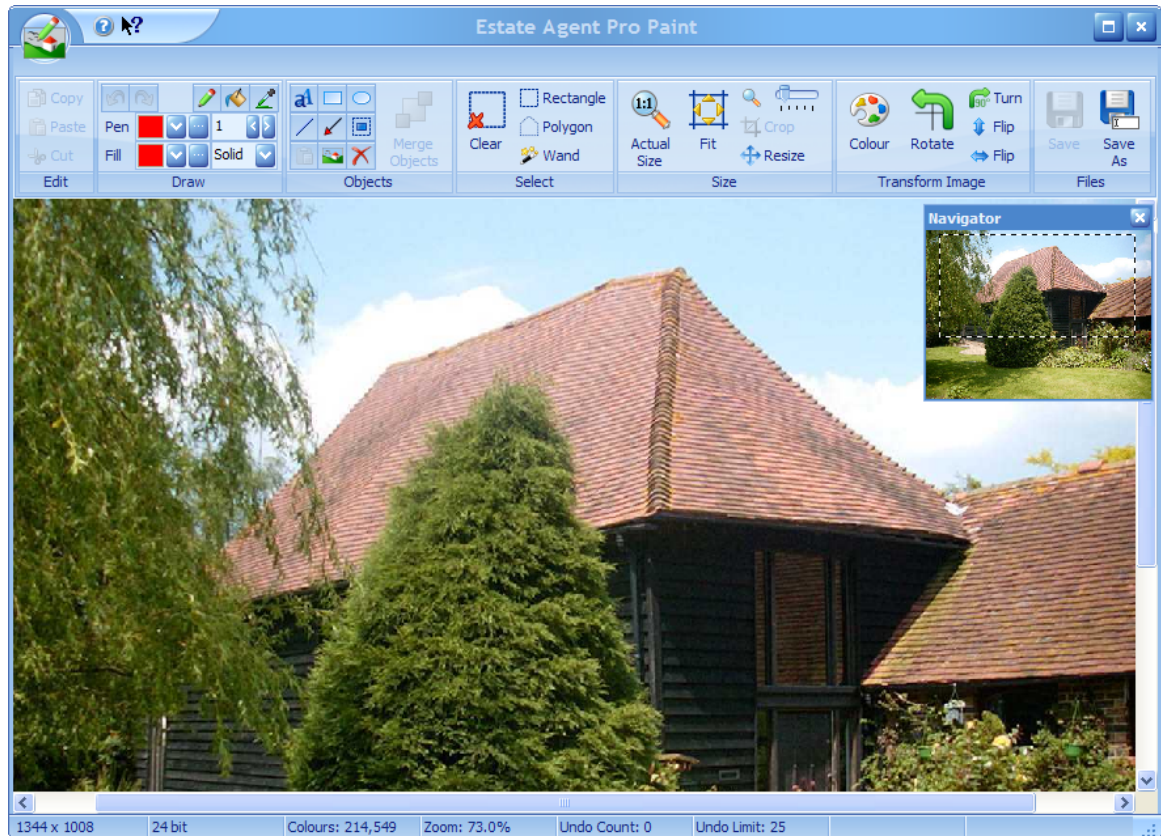
Galleries can be loaded saved and deleted from this dialog. The only real use of galleries is if your valuer has taken lots of photos of several properties and wants the camera back straight away then you can load them all here and save them for use later. Another reason may be that you haven't yet added the property to Estate Agent Pro. In either case we would recommend that galleries are deleted when no longer required.

 Load	Loads the selected gallery into the available images section of the images screen.
 Delete	Deletes the selected gallery.
 Save as...	Saves the contents of the available images section of the images screen to a new gallery. You will be prompted for the name to use as the gallery. If there are no available images this button will be disabled.


5.20.4 Images Editor Screen


Internal image editor where images can be resized, brightened, edited, etc.

IMAGES EDITOR SCREEN



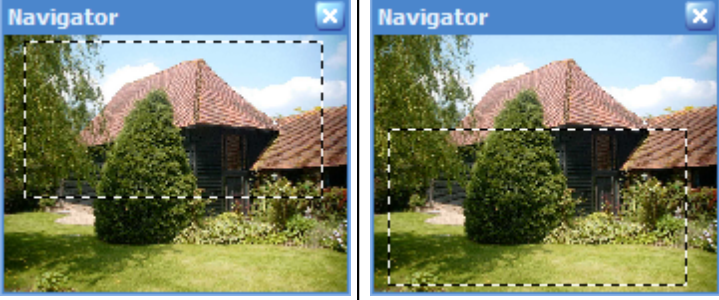


This editor is similar in operation to Microsoft Paint, albeit more powerful.

It is not the intention of this help file to teach you how to use this editor, but rather tell you what the controls do. The best way to learn this is to experiment. No permanent changes will be made to the image until you click on the  button.

 *This editor is provided so that you can resize, crop or brighten an image. You could for example change a grey sky to blue and make the image more presentable. The use of this editor to remove, for example, telegraph poles, is illegal. The use of this editor is therefore your responsibility and Estate Agent Pro Ltd accepts no liability.*

This screen can be broken down into 2 areas.


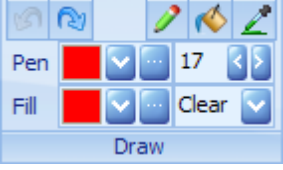
















NAVIGATOR

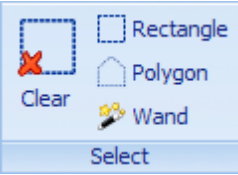




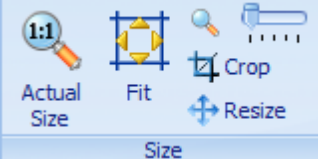





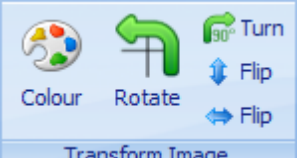





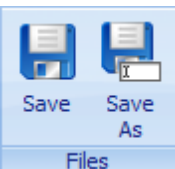


	<p>The dotted box on the navigator represents the area which is shown on the screen. Initially this will be the whole screen until you use the  zoom control. The box can then be dragged around the navigator to display that part of the image in the main photo. The navigator can be dragged completely off this screen for convenience.</p> <p>This box can be closed if not needed by clicking on the  button at the top right hand side of the navigator.</p>
--	--

RIBBON BAR



The purpose of the buttons on the ribbon bar is described below.

	<p>These buttons can be used to copy, paste or cut a selected area of the screen as per normal windows usage. An area of the screen can be selected using any of the controls in the select bar.</p>
	<p>These are the drawing tools. The settings for the pen and fill effect the  and  controls respectively. The number next to the Pen colour is the pen size to use. These colours and sizes are also used in conjunction with objects. The colour picker  can be used to 'pick' a colour from the image. The  and  buttons can be used to undo/redo mistakes. There is a maximum undo limit of 25.</p>
	<p>Objects can be added to the image, positioned, resized, coloured, edited and finally merged into the original image. The current pen and fill settings will be used. The  control is for adding text, the  control is for adding a rectangle and the  control is for adding an ellipse. The  control is for adding a line and the  control is for adding an arrow. The  control is for selecting an object, the  control is for pasting the contents of the clipboard to a new object and the  control allows you to insert an image. The  control deletes a selected object. The  control merges all objects into the image.</p>

	<p>These are the selection tools. The  control is for clearing the current selection. The  control allows you to select a rectangle, the  control a polygon and the  control a contiguous block of similar colours. The wand can be used for example to remove clouds from the sky. To do this click on the wand tool and then click on the part of the sky that you want to change. This will automatically select an area of the sky where the colours are similar. Depending on the image this may be large or small. You can then increase the selected area by shift key and clicking just outside the existing selected area. Once you have fully selected the area of the sky that you want to change, click on the fill tool and then on the selected area of the sky to fill it with the currently selected fill colour.</p>
	<p>The  button sets the image to it's actual size and the  button fits the image to the screen. The  control lets you zoom the image in or out. The  control is for cropping the selected portion of the image. The  button opens the Resize Screen.</p>
	<p>The  button opens the Colour Adjustment Screen and the  button opens the Rotate Screen. The  button flips the image 90°, the  button flips the image horizontally and the  button flips the image vertically.</p>
	<p>The  button saves the changes made and closes this screen. The  button allows you to save the image to any location on your hard drive.</p>

5.20.5 Resize Screen


This screen is used to resize an image optionally applying a filter.



To maintain the **aspect ratio** of the image ensure that the check box remains ticked.

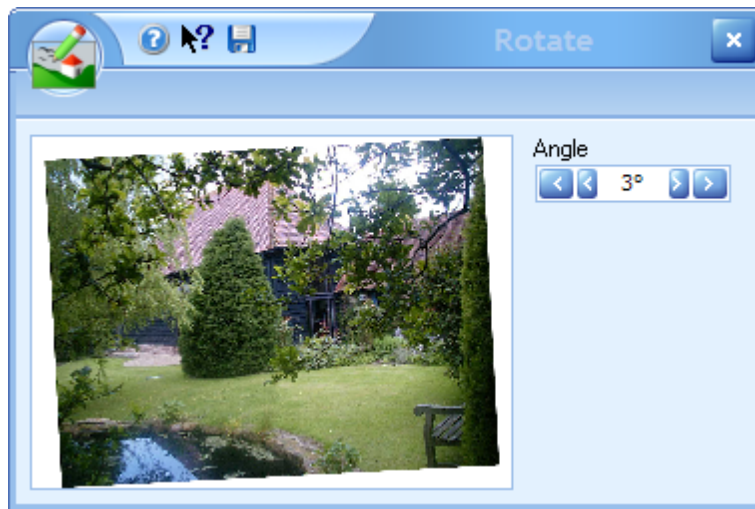
When an image is made smaller the appearance may become distorted due to the dropping of pixels. A filter can be used to reduce this distortion. The best **filter** to use for camera images is Lanczos3 which is set as the default.

Set the **height** and **width** to the size you require. If the aspect ratio check box is ticked it is only necessary to change one of these settings as the other one will be automatically adjusted as you enter the new height or width.

Click on the  button to close this screen and resize the image.

5.20.6 Rotate Screen


This screen can be used to rotate an image to any angle.



This would normally be used to straighten an image.

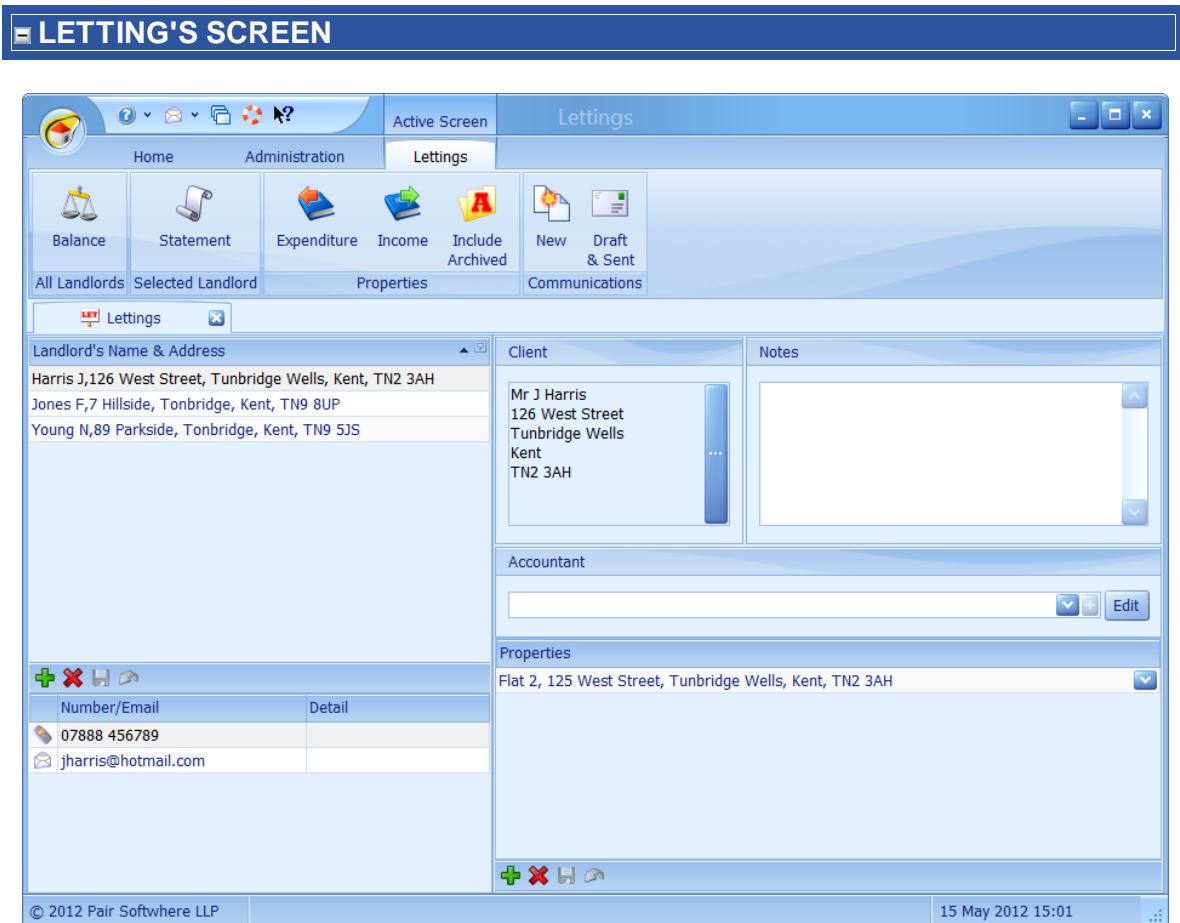
As the angle is changed it will be reflected in the image.

The inside arrows will increase/decrease the angle by 1° , the outer arrows by 10° .

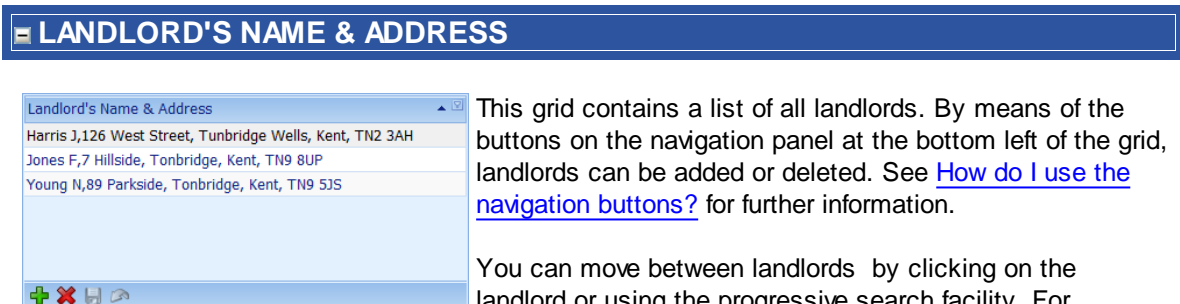
Click on the  button to close this screen and save the changes made.

5.21 Letting's Screen

The letting's screen is where you can communicate with landlords and record income/expenditure against their properties. Statements and balances of account can also be generated.



This screen can be broken down into 6 different areas.



This grid contains a list of all landlords. By means of the buttons on the navigation panel at the bottom left of the grid, landlords can be added or deleted. See [How do I use the navigation buttons?](#) for further information.

You can move between landlords by clicking on the landlord or using the progressive search facility. For example if, when the grid is focused, you press the **J** key it will move to **Jones Jerry**.

CONTACT DETAILS

Number/Email	Detail
07888 456789	
jharris@hotmail.com	

These are the contact details that have been entered for the landlord. These can be changed by clicking on the button on the right hand side of the landlord's name and address shown in the Client panel.

See [How do I use the contact details grid?](#) for further information on how to use this grid.

CLIENT/NOTES/ACCOUNTANT

Client Mr J Harris 126 West Street Tunbridge Wells Kent TN2 3AH	Notes
Accountant Burkins-Regent Accountants, 87 High Street, T	Edit

Client: To change the clients details click on the button on the right hand side of the client's name and address. This includes the ability to add contact details. See the [Client's Screen](#) for more information.

Notes: Any informational notes can be added here.

Accountant: The landlord's accountant can be selected, changed or added here.

PROPERTIES

Properties Flat 2, 125 West Street, Tunbridge Wells, Kent, TN2 3AH
+ - [icon] [icon]

This is a list of properties that the currently selected landlord owns.

Existing rental properties can be added here by means of the + button but are more normally assigned to the landlord as the vendor when initially added. Deleting a property by means of the - button will remove the link to the landlord. It will not delete the property.







Double clicking on an individual property will open the [Properties Screen](#) focused to the respective property.

RIBBON BAR

Balance	Statement	Expenditure	Income	Include Archived	New	Draft & Sent
All Landlords	Selected Landlord	Properties			Communications	

The buttons on the ribbon bar can be used as follows:

	Displays a screen where you can specify the date range to use which defaults to the beginning of the current month. A report of the balance outstanding of all landlords is then generated.
--	---

 Statement	Displays a screen where you can specify the date range to use which defaults to the beginning of the current month. A report of statement of accounts of the selected landlord is then generated.
 Expenditure	Displays a screen listing all expenditure entered for the selected property of the selected landlord where new expenditure can be added. A report of this expenditure can also be printed. See the Letting's Income/Expenditure Screen for more information.
 Income	Displays a screen listing all income entered for the selected property of the selected landlord where new income can be added. A report of this income can also be printed. See the Letting's Income/Expenditure Screen for more information.
 Include Archived	Toggles the inclusion/exclusion of the selected landlords archived properties.
 New	Opens the letters screen where you can send bulk mailings of predefined letters to the landlords by either text, email or post. All letters sent are saved in the sent letters of the respective landlord. See the Communications Screen for more information.
 Draft & Sent	Provides details of all communications previously sent to the currently selected landlord. Communications can be resent from this screen. See the Customer Communications Screen for more information.

5.21.1 Letting's Income/Expenditure Screen

Expenditure and income entered for a landlord's property is entered on two different screens. The expenditure screen is shown here.

LETTING'S INCOME/EXPENDITURE SCREEN

Date	Ref	To	Narrative	Net Amount	VAT	Gross Amount
31/07/2010	1794	Tonbridge Estate Agents	Management Fee	£100.00	£17.50	£117.50
05/08/2010		Greens Gardens	Grass cutting	£25.00	£0.00	£25.00
31/08/2010	1836	Tonbridge Estate Agents	Management Fee	£100.00	£17.50	£117.50
09/09/2010		The Plumbing Co	Fitting of new cistern	£150.00	£26.25	£176.25
						£436.25

New income or expenditure can be added by clicking on the button on the navigator panel at the bottom left hand side of the grid. See [How do I use the navigation buttons?](#) for further information.

The grid can be printed by clicking on the button.

This grid has the ability of being grouped by columns. See [How do I use grid column grouping and filtering?](#) for further information.

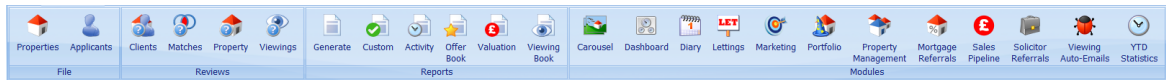
INCOME/EXPENDITURE GRID

All historical income or expenditure is recorded here.

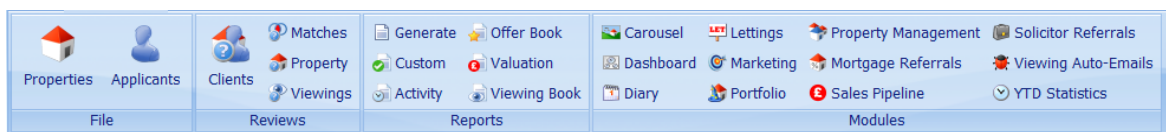
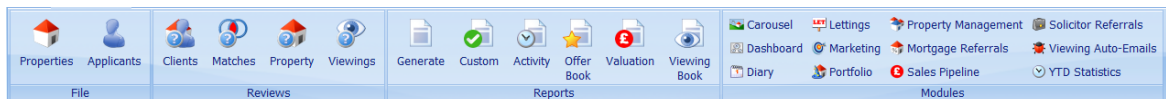
Date	Date of the invoice or the date it was paid according to how you deal with management accounts.
Ref	Reference number of invoice or reference you wish to use (if any).
To/From	For expenditure, the company who issued the invoice. If income, the company/ individual who made the payment.
Narrative	Summary details of invoice.
Net Amount	Net amount.
VAT	VAT (if applicable).
Gross Amount	Gross amount (automatically calculated).

5.22 Main Screen

This is the ribbon bar of the main screen of Estate Agent Pro. All sub-systems are available from here.




When the screen is made narrower, the icons on the toolbar will re-size themselves automatically from 32x32 pixels with text, to 16x16 pixels with text and finally 16x16 pixels without text. This will start at the right of the ribbon and work its way to the left hand side. Two examples of this are shown below.

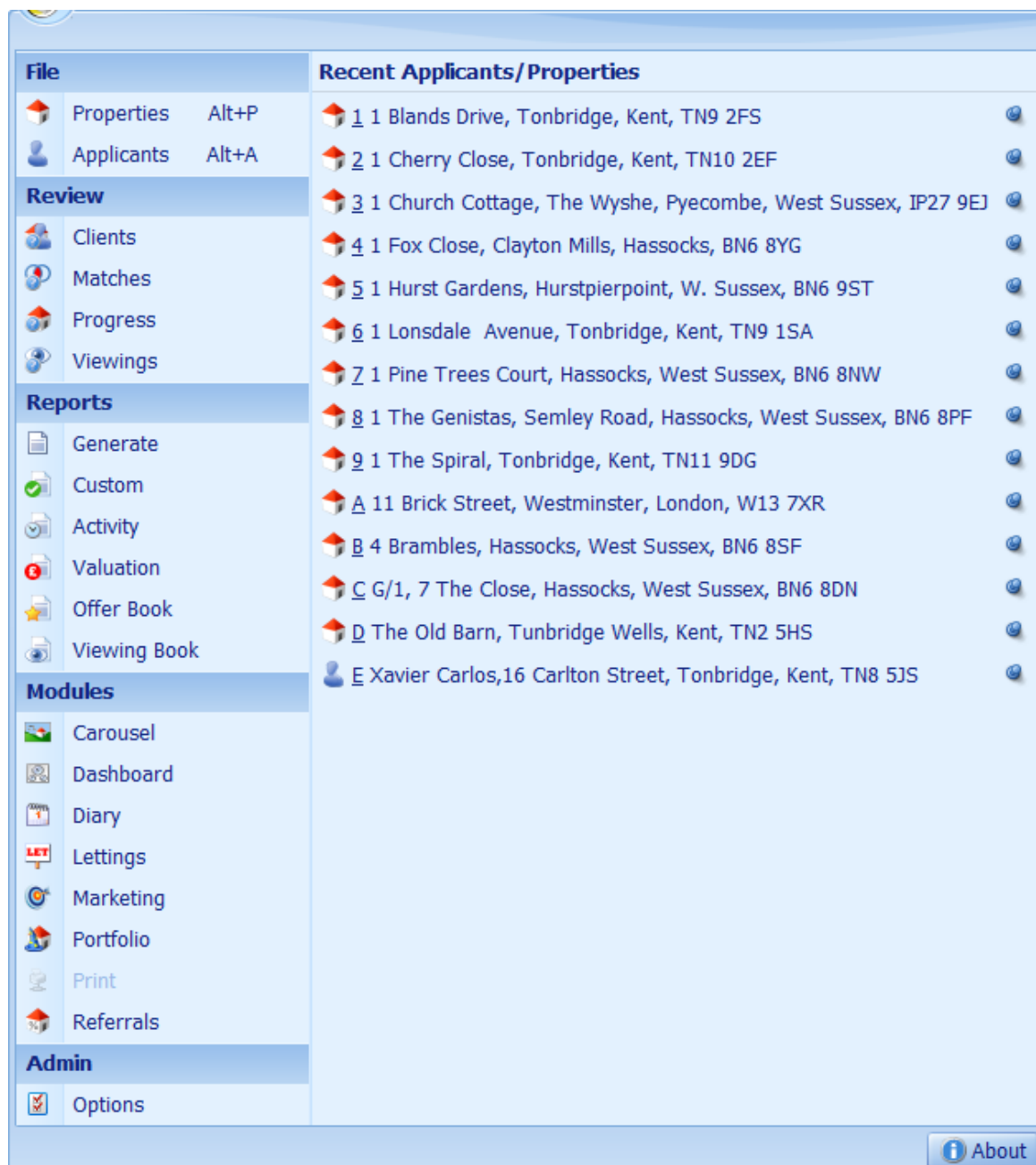


The buttons on the quick access toolbar give you quick access to common areas of the software. The button highlighted is the support button which allows you to easily communicate with technical support. See the [Support Screen](#) for further information.



The help file page for the current screen can be opened by either pressing F1 or clicking the  button.

 Clicking on the Application Button will display the application menu.



This gives access to all of the buttons that are on the ribbon bar down the left hand side but, more importantly it will display a list of the most recent properties and applicants edited. Clicking on them will open the respective applicant or property. Alternatively, typing the number or letter shown underlined against them will do the same thing. Applicants or properties can be removed from this list by clicking on the pin shown at the right hand side. This list is remembered between invocations of Estate Agent Pro Enterprise.

The individual screens are not limited to the size of the main screen, but it is recommended that for ease of use and clarity that you use the main screen maximised.



When a mouse hovers over a button it's background colour will change to indicate this.





















When the button is clicked it's background colour will change to a darker shade.

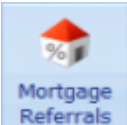
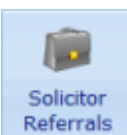

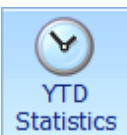


The following screens are available directly from buttons on the ribbon. Clicking on the respective

button will jump to the help screen for it.

 Properties	<p>The properties screen is where all details relating to properties can be recorded including vendor details, communications, images, property particulars, chain flow, viewings, offers, sales and matches against applicants. By default all active (non-archived) properties are displayed.</p> <p>See the Properties Screen for further information.</p>
 Applicants	<p>The applicants screen is where all details relating to applicants can be recorded including communications, viewings and matching against properties. By default all active (non-archived) properties are displayed.</p> <p>See the Applicants Screen for further information.</p>
 Clients	<p>The client review screen is where clients are reviewed. Each client can have an individual review cycle set (default 30 days) and is designed so that you can more easily control your client list. If a client is active e.g. matched against or communicated with then the system automatically resets the next review date. Double clicking on a client will open either the applicant or properties screen focused to the respective client or clients property. See the Client Review Screen for further information.</p>
 Matches	<p>The matches review screen is where all open matches against all properties are displayed. For example, Mr Jones matched against 7 Oakbridge Rise and you sent him details of the property. He will appear in this review list until you mark it as actioned. Viewings can be added directly from this screen. Double clicking on an individual property in the property column will open the properties screen focused to the respective property and likewise for the applicant. See the Matches Review Screen for further information.</p>
 Progress	<p>The progress review screen is a property based way of reviewing vendors and has options to allow you to quickly access underlying data. See the Progress Review Screen for more information.</p>
 Viewings	<p>The viewings review screen displays all open viewings e.g. those viewings where either the vendor or applicant has not confirmed the viewing, the vendor has not been given feedback and the viewing has not been cancelled.</p> <p>See the Viewings Screen for further information.</p>
 Generate	<p>The report generator screen is where you can generate reports on either a subset of applicants or properties filtered easily by yourself. You can also send bulk emails to the subset of applicants or to the vendors of the subset of properties. Double clicking on an individual applicant or property will open the applicant or properties screen focused to the respective applicant or property. See the Report Generator Screen for further information.</p>
 Custom	<p>The custom reports screen displays a list of reports for you to run on any data within the database. These will have either been written by yourselves or Estate Agent Pro Ltd for you (charges apply).</p> <p>See the Custom Reports Screen for further information.</p>
 Activity	<p>The activity report screen lists all activities on all properties within a selected date range (default 30 days). Double clicking on an individual property will open the properties screen focused to the respective property.</p> <p>See the Activity Report Screen for further information.</p>

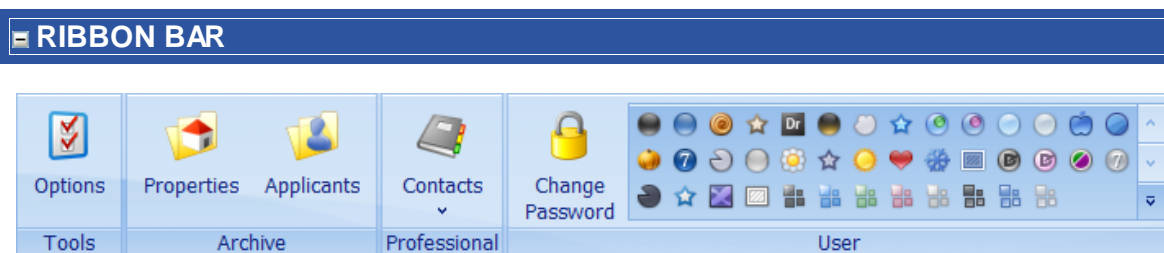
 Valuation	<p>The valuation report screen lists all properties with a status of 'valuation' so that you can easily monitor those vendors/properties that have not progressed beyond that stage. Double clicking on an individual property will open the properties screen focused to the respective property.</p> <p>See the Valuation Report Screen for further information.</p>
 Offer Book	<p>The offer book screen lists all offers made on available, under offer and sale agreed properties. Double clicking on an individual property in the property column will open the properties screen focused to the respective property and likewise for the applicant.</p> <p>See the Offer Book Screen for more information.</p>
 Viewing Book	<p>The viewing book screen lists all viewings made (read only) on all properties within a specified date range (default 30 days). Double clicking on an individual property in the property column will open the properties screen focused to the respective property and likewise for the applicant.</p> <p>See Viewing Book Screen for more information.</p>
 Carousel	<p>The carousel screen is designed to be run in office windows or reception areas and will display a continuous selection of properties based on your own criteria and design and can be configured from this screen. It is not recommended to run the carousel users PC's other than for configuration purposes. Because of this the button is disabled when any other screens are open.</p> <p>See the Carousel Screen for more information.</p>
 Dashboard	<p>The dashboard screen gives a summary of all exchanges, completions, viewings, valuations and appointments that are due today and by default is displayed automatically when Estate Agent Pro is opened. This can be configured on a per user basis.</p> <p>See the Dashboard Screen for more information.</p>
 Diary	<p>The diary screen contains details of appointments made for all members of staff and is very similar in design and operation to the diary in Microsoft Outlook in fact, it can be synchronised with Microsoft Outlook. It has a built in reminder facility. All accompanied viewings and valuations are automatically added to the diary.</p> <p>See the Diary Screen for more information.</p>
 Lettings	<p>The letting's screen is where you can communicate with landlords and record income/ expenditure against their properties. Statements and balances of account can also be generated. Double clicking on an individual property will open the properties screen focused to the respective property.</p> <p>See the Letting's Screen for more information.</p>
 Marketing	<p>The marketing screen is where you can communicate with all clients both active and historical, other estate agents, solicitors or indeed anyone else you may have added such as plumbers and electricians. Communications can be sent individually or in bulk to all or any subset of individuals easily filtered by yourself.</p> <p>See the Marketing Screen for more information.</p>
 Portfolio	<p>The portfolio screen is designed to be used when seated at a screen that is visible by an applicant. It displays graphically a list of properties one by one according to easily selectable criteria. Properties can be bookmarked and a report of them given to the client. There is an interface to Google Maps so that the location of the properties can</p>

	easily be seen. See the Portfolio Screen for more information.
	<p>The Mortgage Referrals screen is where the status of all mortgage and non-mortgage referrals can be displayed. This module is only available in the full version of EAP Enterprise.</p> <p>See the Mortgage Referrals Screen for more info.</p>
	<p>The Solicitor Referrals screen displays all clients that have been referred to a solicitor. This module is only available in the full version of EAP Enterprise.</p> <p>See the Solicitor Referrals Screen for more info.</p>
	<p>The Viewing of Automated Emails error screen displays a list of all errors encountered when sending automated emails. This module is only available in the full version of EAP Enterprise.</p> <p>See the Automated Viewing Email Error Screen for more info.</p>
	<p>The YTD Statistics screen displays statistics for the current year versus a previous year, broken down by month giving details of the number of valuations, instructions, viewings, offers, sales and exchanges or completions. Previous years can also be selected. See the YTD Statistics Screen for more information.</p>

Administrative functions are available on the [Admin Tab](#).

5.22.1 Admin Tab







Administrative functions are available on this tab.



With the exception of the Change Password button, access to all areas is controlled by your system administrator.

If you don't have access, and you think that you should, please speak to your administrator.

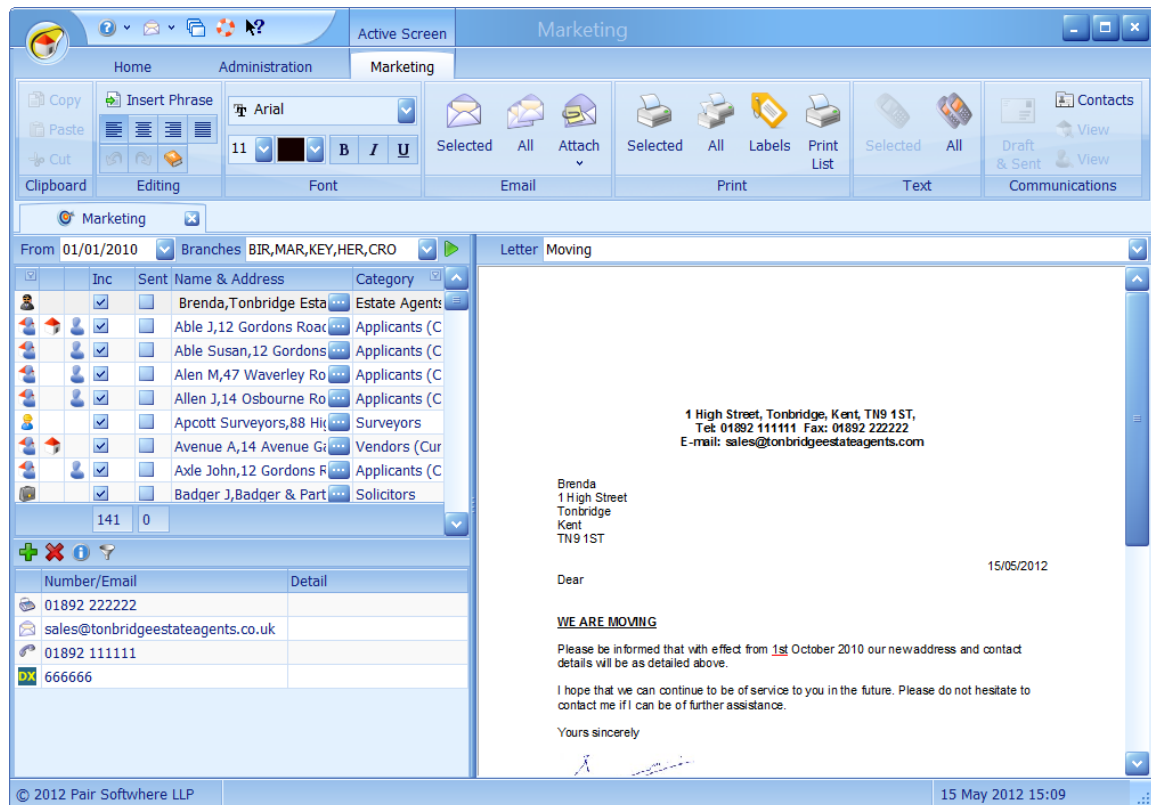
Use of these areas is described below:

 Options	<p>This is where all administrative options in connection with the functioning of Estate Agent Pro can be customised.</p> <p> Changes made here could stop your system working altogether and therefore changes should only be made by properly trained personnel.</p> <p>See System Administration for more information.</p>
 Properties	<p>When properties are deleted they are moved to the property archive. Properties can be restored from here if, for example, they come onto the market again.</p> <p>See the Archived Properties Screen for more information.</p>
 Applicants	<p>When applicants are deleted they are moved to the applicant archive. Applicants can be restored from here if, for example, they were accidentally deleted.</p> <p>See the Archived Applicants Screen for more information.</p>
 Contacts	<p>Contact details for estate agents, solicitors and surveyors can be looked up here but cannot be edited.</p> <p>See the Professional Contacts Screen for more information.</p>
 Change Password	<p>You can change the password you use to access Estate Agent Pro here. You will be required to provide your existing password.</p>

5.23 Marketing Screen

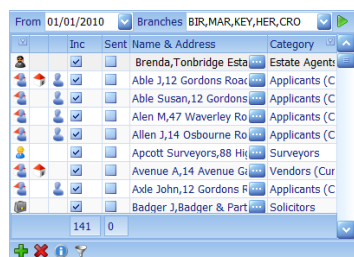
The marketing screen is where you can communicate with all clients both active and historical, other estate agents, solicitors or indeed anyone else you may have added such as plumbers and electricians.

MARKETING SCREEN



This screen can be broken down into 4 primary areas.

CLIENTS GRID



See [How do I use the navigation buttons?](#) for further help on the navigation bar.

This grid contains a list of all clients in the system. This comprises of all applicants, additional applicants, vendors, additional vendors, external clients that have been added in a chain, accountants, estate agents, solicitors, surveyors that have been added from any of the other screens in Estate Agent Pro Enterprise.



The **From** date includes clients based on the date the clients record was created/edited. The **Branches** list is the branches to include. Once set these will be remembered. If you need to change these it will be necessary to click on the button to reload the client list.


It also includes other "clients" that you can add using this screen such as plumbers, electricians, etc. to do so use the button on the navigation bar at the bottom left hand side of this grid.

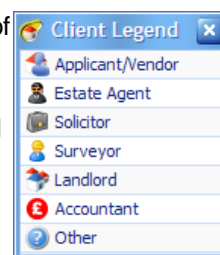
Clients can be filtered on by using the button. See [How do I filter properties?](#) for an example of how this works. Only the advanced

filtering tab is available here.

Removing the ☒ check from the Inc(lude) column will exclude the client from being sent the letter when using Email All, Print All and Text All.

If the client is a vendor the  image will be displayed in the second column. If the client is an applicant the  image will be displayed in the third column. Of course, a client can be both a vendor and an applicant!




The first column graphically illustrates the type of internal EAP Client this is. Clicking on the  button on the navigator bar will display the client legend as shown. These are internal to EAP and cannot be changed.



The Category column is definable by your system administrator.



Both of these two columns can be filtered. See [How do I use grid column grouping and filtering?](#) for further information.

CONTACT DETAILS GRID

Number/Email	Detail
 jable@hotmail.com	
 01892779674	Work
 07787234673	

These are the contact details that have been entered for selected client.

The image in the left hand column indicates the type of communication device applicable.

Clicking on the  button will open the [SMS Text Messaging Screen](#) to enable you to send text messages to them. This has to be configured and additional charges apply. Clicking on the  button will open the [Email Screen](#) enabling you to send an email. Both of these types of communication will be stored under the Draft & Sent Communications of the client. See the [Customer Communications Screen](#) for more information.

MARKETING LETTER

Letter **Moving**

1 High Street, Tonbridge, Kent, TN9 1ST,
Tel: 01892 111111 Fax: 01892 222222
E-mail: sales@tonbridgeestateagents.com

Mr J Able
12 Gordons Road
Tonbridge
Kent
TN9 9QF

14/09/2010

Dear Mr Able

WE ARE MOVING

Please be informed that with effect from 1st October 2010 our new address and contact details will be as detailed above.

I hope that we can continue to be of service to you in the future. Please do not hesitate to contact me if I can be of further assistance.


Yours sincerely




Johnathon Ross
Manager

Any number of standard letters specifically for marketing can be defined by your system administrator and provide standard mail-merge capabilities. The letter to use can be selected by using the **Letter** drop down list. Once merged these letters can be edited before being texted, emailed or printed. The sending/printing of these letters is covered in the [Ribbon Bar](#) section below.

Spell checking, similar to Microsoft Word is used in all letters and certain other areas as appropriate. Misspelled words are underlined with a red squiggly line e.g. interesst. Right mouse clicking on the word will provide a list of alternatives.

A thesaurus is available by placing the cursor on any word and then clicking the  button. A screen will be displayed which allows you to replace the current word with a synonym or antonym.

Standard phrases, defined by your system administrator can be inserted using the  button.

 *This screen is designed to save you money when communicating with lots of clients. It is recommended that whenever possible you email all clients that have an email address by clicking*








the Email All button as this doesn't cost anything. The checkbox in the Sent column will automatically be updated if the email was successfully sent. Next, if the letter is small, send a text to all of the remaining clients that have a mobile phone by clicking the Text All button. Again the checkbox in the Sent column will be automatically updated. You can then print the letter to all of the remaining clients by clicking the Print All button.

RIBBON BAR



It is not the intention of this document to provide an explanation of standard functions found in the Clipboard, Editing and Font ribbon bar groups with the exception of the usage of the thesaurus and Insert Phrase buttons which has already been covered under the [Marketing Letter](#) section above.

	This will open the Email Screen populated with the mail-merged letter along with any attachments added with the selected client set as the recipient. Your Email logo if defined is automatically added to the top of the email. At this point additional recipients or cc's can be added. Once sent, the letter will be stored, along with any attachments, in the clients sent letters. The checkbox in the Sent column will be automatically checked. If this button is disabled it is because the client doesn't have an email address or email has not been configured by your system administrator.
	This will send an email to all clients that have the inc(lude) checkbox ticked, have not already been sent a communication (Sent column ticked), and have an email address. The checkbox in the Sent column will be automatically checked if the email is successfully sent. This will take a little while if emailing lots of applicants.
	This is a split button. If the top part of the button is clicked a dialog will be displayed enabling you to select a file to attach. If the bottom part of the button is clicked a drop down list will be displayed listing the current attachments. Any number of attachments can be added.
	Prints the letter and, as the system assumes you will be posting this to the client, stores it in the clients sent letters. The checkbox in the Sent column will be automatically checked.
	This will print a letter to all clients that have the inc(lude) checkbox ticked, have not already been sent a communication (Sent column ticked). The checkbox in the Sent column will be automatically checked. This will take a little while if printing letters to lots of applicants.
	This prints address labels for all clients that have the inc(lude) checkbox ticked.
	Displays a list of all Inc(luded) clients and their contact details for printing.

 <p>Selected</p>	<p>This will open the SMS Text Messaging Screen screen populated with the mail-merged letter. Once sent the letter will be stored in the clients sent letters. Letters sent as text messages should be brief as the maximum content of each message is limited to 160 characters. If it is more than this it will be sent as multiple texts. The checkbox in the Sent column will be automatically checked. If this button is disabled it is because the client doesn't have a mobile or text messaging has not been configured by your system administrator.</p> <p> <i>Additional charges apply.</i></p>
 <p>All</p>	<p>This will send a text message to all clients that have the inc(lude) checkbox ticked, have not already been sent a communication (Sent column ticked), and have a mobile phone. The checkbox in the Sent column will be automatically checked if the text message is successfully sent. This will take a little while if texting lots of applicants.</p>
 <p>Draft & Sent</p>	<p>Provides details of all communications previously sent to the current client. Communications can be resent from this screen.</p> <p>See the Customer Communications Screen for more information.</p>
 <p>Contacts</p>	<p>Displays a list of all contact details for this client including those of the vendor and his solicitor if relevant. There are also tabs on the screen for sales chasing, central notes and chain flow.</p> <p>See the Contacts Screen for more information.</p>
 <p>View</p>	<p>This is enabled if the current client is a vendor. Clicking this button will open the Properties Screen focused to this clients property.</p>
 <p>View</p>	<p>This is enabled if the current client is an applicant. Clicking this button will open the Applicants Screen focused to the clients applicant record.</p>

5.24 Matches Review Screen

This screen can be generated from the applicants screen, in which case it will only show open matches associated with the selected applicant or, if generated from the properties screen, it will only show open matches associated with the selected property. If it is generated from the main screen it will contain all open matches.

MATCHES REVIEW SCREEN

The screenshot displays the 'Matches Review' screen in the Estate Agent Pro Enterprise software. The interface is divided into several sections:

- Header:** A blue bar at the top contains the title 'MATCHES REVIEW SCREEN'.
- Navigation:** A menu bar at the top includes 'Home', 'Administration', and 'Matches Review'.
- Filters and Actions:** A section on the left allows filtering by 'As Of' date (06/10/2018) and includes buttons for 'Delete', 'Actioned', 'Refresh', 'Add', and 'Viewing'. It also has tabs for 'Action', 'Review', and 'Communications'.
- Matches Table:** A large table with columns: Branch, Matched, Applicant, Neg, Sale Type, Property, App Status, and From. It lists various matches, including those for 'Tonbridge' and 'Van Den Elzen Maria'. A summary bar at the bottom of the table indicates '310 Matches'.
- Dated Notes:** A section below the table with columns: Date, Reason, Branch, Notes, Init, and Method. It shows two entries for '05/06/2016' with the reason 'Ring Out' and branch 'CRO'.
- Contact Details:** A section on the right with columns: Whom, Number/Email, and Detail. It lists contact information for 'Primary' and 'Additional' contacts, including phone numbers and email addresses.
- Status Bar:** The bottom of the screen shows '© 2018 Estate Agent Pro Ltd', 'Logged in as Ken/Tonbridge', and the date '06 October 2018 08:31'.

Matches should be reviewed daily otherwise the number of matches to review will become too large to manage.

This screen can be broken down into 4 primary areas.

MATCHES GRID

Drag a column header here to group by that column

Branch	Matched	Applicant	Neg	Sale Type	Property	App Status	From
Tonbridge	30/04/2015	Able J,12 Gordons Road, Ton		Purchase	The Old Barn , Tunbridg	Nothing to Sell	Manual
Tonbridge	30/04/2015	Able J,12 Gordons Road, Ton		Purchase	The Old Barn , Tunbridg	Nothing to Sell	Manual
Tonbridge	24/05/2015	Baggings F,15 Broomfield Driv		Rent	1 Sweetlands, Hassocks	First Time Buyer	Manual
Tonbridge	28/07/2015	Beval Bob,23 High Street, Ton	KC	Purchase	11 Popular Close, Tonbri	First Time Buyer	Prop
Tonbridge	16/09/2015	Beval Bob,23 High Street, Ton	KC	Purchase	Old Cottage Wadhurst R	First Time Buyer	Prop
Tonbridge	28/07/2015	Bloggs XX,290b Stratford Ro		Purchase	11 Popular Close, Tonbri	First Time Buyer	Prop
Tonbridge	12/10/2015	Bloggs XX,290b Stratford Ro		Purchase	1 Fox Close, Clayton Mills	First Time Buyer	Prop
Tonbridge	16/09/2015	Bloggs XX,290b Stratford Ro		Purchase	Old Cottage Wadhurst R	First Time Buyer	Prop
Tonbridge	28/07/2015	Brightwell F,18 Western Road	RR	Purchase	11 Popular Close, Tonbri	Investor	Prop
Tonbridge	28/07/2015	Brightwell F,18 Western Road	RR	Purchase	11 Popular Close, Tonbri	Investor	Prop
Tonbridge	30/04/2015	Clevedon X,13 Prince Street,		Purchase	41 Gloucester Avenue, T	Other Agent	App
Tonbridge	17/10/2015	Clevedon X,13 Prince Street,		Purchase	32 Surrey Road, Tunbrid	Other Agent	App
Tonbridge	14/10/2015	Clevedon X,13 Prince Street,		Purchase	32 Surrey Road, Tunbrid	Other Agent	App
Tonbridge	11/08/2015	Clevedon X,13 Prince Street,		Purchase	32 Surrey Road, Tunbrid	Other Agent	App
Tonbridge	02/08/2015	Clevedon X,13 Prince Street,		Purchase	32 Surrey Road, Tunbrid	Other Agent	App
Tonbridge	29/05/2015	Clevedon X,13 Prince Street,		Purchase	32 Surrey Road, Tunbrid	Other Agent	App
Tonbridge	29/05/2015	Clevedon X,13 Prince Street,		Purchase	40 Northumberland Aver	Other Agent	App
		180 Matches					

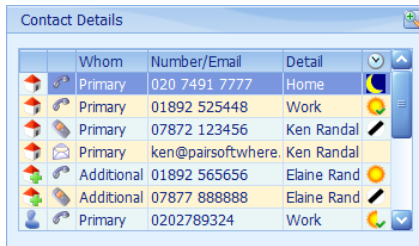
This grid contains all open (non-reviewed) matches by applicant and property. The list is initially sorted by the applicants name and address.

Certain columns can be dragged to the group area as indicated

A in the left most column indicates that the applicant is in the process of purchasing one of your properties.

This grid has the ability of being grouped and filtered by columns. See [How do I use grid column grouping and filtering?](#) for further information

CONTACT DETAILS



	Whom	Number/Email	Detail	
	Primary	020 7491 7777	Home	
	Primary	01892 525448	Work	
	Primary	07872 123456	Ken Randal	
	Primary	ken@pairsoftwhere.	Ken Randal	
	Additional	01892 565656	Elaine Rand	
	Additional	07877 888888	Elaine Rand	
	Primary	0202789324	Work	

The button can be used to undock (expand) the panel to make it easier to see multiple entries.

These are the contact details that have been entered for the applicant and the vendor of the focused property.

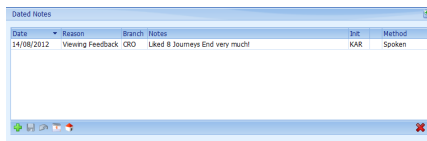
Clicking on the button will open the [SMS Text Messaging Screen](#) to enable you to send text messages to whoever is detailed in the *Whom* column. This has to be configured and additional charges apply.

Clicking on the button will open the [Email Screen](#) enabling you to send an email.

Both of these types of communication will be stored under Draft & Sent Communications of the applicant or vendor respectively. See the [Customer Communications Screen](#) for more information.

Double clicking on the button will undock this panel making it larger for ease of use.

DATED NOTES



Date	Reason	Branch	Notes	Int	Method
14/08/2012	Viewing Feedback	CRO	Liked 8 Journeys End very much!	KAR	Spoken

The button can be used to undock (expand) the panel to make it easier to see multiple entries.

Applicant date related notes can be entered here.

See [How do I use the navigation buttons?](#) for further help on the navigation bar.

The button can be used to enter the note entered into the diary on the date entered.

Double clicking on the button will undock this panel making it larger for ease of use.

Clicking on the button will open a screen allowing you to select a vendor you want to also save the dated note to. If there is an associated vendor he/she will be automatically selected. The dated note to be saved against the vendor can also be changed.

By default dated notes cannot be changed.

RIBBON BAR

As Of <input type="text" value="21/10/2015"/> Delete Actioned Refresh Add Viewing	Tomorrow 1 Week 1 Month On <input type="text"/>	Contacts New Print
Action	Review	Communications

	Repopulate the matches grid with matches that are due on the date entered. This is handy if for example you will be out of the office for a week so want to review them in advance now.
	Deletes the match. Will be as if the match did not happen.
	Mark the match as actioned, it will not appear for review again.
	Refresh the list of open matches. This only needs to be done if you know that someone else in your office has done any matches since you opened this screen.
	Adds a viewing for the selected applicant/property
	Sets the match for review tomorrow, it will be removed from the list of matches being reviewed.
	Sets the match for review in one weeks time and removes it from the list.
	Sets the match for review in one months time and remove it from the list.
	Sets the match for review on the date entered against it and removes the match from the list. This option is disabled until a date is entered.
	Displays a list of all contact details for the associated applicant/vendor.
	Opens the Communications Screen for the sending of letters via email, SMS, etc to the currently selected applicant.
	Prints the grid exactly as displayed..

5.25 Mortgage Referrals Screen

This screen lists the status of all clients who have been referred/not referred to a mortgage advisor and is only available in the full version of EAP Enterprise.

Mortgage Referrals Report

Start: 01/01/2015, End: 16/01/2015

Report Criteria: Referrals, Non-Referrals, Email Grid, Print Grid, Print Preview, Applicant, Property

Drag a column header here to group by that column

Date	Type	Branch	Init	Name & Address	Spoken	FS Feedback	FS Outcome	Mortgage Notes
06/01/2015	Applicant	Tonbridge	PW	Florins M,5 Albert Close, Tonbridge, Kent, TN9 3WE	No	Await Response from Advisor	Await Response from Advisor	
08/01/2015	Applicant	Tonbridge	TC	Young A,67 Lemon Drive, Tonbridge, Kent, TN9 7AS	No	Await Response from Advisor	Await Response from Advisor	
13/01/2015	Applicant	Tonbridge	KAR	Able J,12 Gordons Road, Tonbridge, Kent, TN9 9QF	No	Await Response from Advisor	Await Response from Advisor	
16/01/2015	Vendor	Tonbridge	PW	Northdown N,18 Northdown Road, Tonbridge, Kent, TN10 3AS	Yes	Await Response from Advisor		
16/01/2015	Vendor	Tonbridge	MMJ	Randall Ken,12 Brick Street, Westminster, London, W13 7XR	No	Await Response from Advisor	Await Response from Advisor	

Referrals 5, Spoken to MA 20.00%, Has Signed 0.00%, Will Sign 0.00%, Might Sign 0.00%, Elsewhere 0.00%, Awaiting Response 80.00%

© 2014 Pair Softwhere LLP 0 16 January 2015 10:28

By default the start/end dates are for the previous rolling month. Changing the start or end dates will automatically refresh the report.

The grid can be printed or emailed exactly as it is displayed on the screen by clicking on the Print Grid or Email Grid button respectively.

The selected applicant or vendor (property) screen can be displayed by clicking on the view applicant or view property buttons.

This grid has the ability of being grouped and filtered by columns. See [How do I use grid column grouping and filtering?](#) for further information

5.26 Offer Book Screen

The offers screen lists all offers made on available, under offer and sale agreed properties.

OFFER BOOK SCREEN

Branch	Property	Neg	Applicant	Bridging Facilities	Incomplete Chain	Finance Company	Finance Amount	Finance Contact	Finance Confirmed	Estimated Exchange Date	Estimated Completion Date	Date Last Offer Made														
Tonbridge	1 Blands Drive, Tonbridge, Kent, TN9 2FS	PW	Dempsey C, 14 Deacon Road, Tunbridge Wells, Kent, TN1 1ME	No	No				No			17/09/2010														
Tonbridge	1 Blands Drive, Tonbridge, Kent, TN9 2FS	PW	Killpatrick S, 99 Grove Street, Tonbridge, Kent, TN10 8AA	No	No				No			17/09/2010														
<table border="1"> <thead> <tr> <th>Offer</th> <th>Date</th> <th>Time</th> <th>Detail</th> <th>Init</th> <th>Sent</th> <th>Status</th> </tr> </thead> <tbody> <tr> <td>£220,000.00</td> <td>17/09/2010</td> <td>16:41:27</td> <td></td> <td>KAR</td> <td><input type="checkbox"/></td> <td>Made</td> </tr> </tbody> </table>													Offer	Date	Time	Detail	Init	Sent	Status	£220,000.00	17/09/2010	16:41:27		KAR	<input type="checkbox"/>	Made
Offer	Date	Time	Detail	Init	Sent	Status																				
£220,000.00	17/09/2010	16:41:27		KAR	<input type="checkbox"/>	Made																				
Tonbridge	11 Popular Close, Tonbridge, Kent, TN9 1UP	KH	Quicken S, 3 The Drive, Tonbridge, Kent, TN9 8AS	No	No	Bank of Scotland	£150,000	Mrs Jones	Yes	30/10/2010	30/11/2010	02/09/2010														
Tonbridge	14 Ridgeway Road, Tunbridge Wells, Kent, TN4 0AP	TC	Thomas T, 16 Purple Way, Tonbridge, Kent, TN9 8HY	No	No	Natwest	£100,000		Yes	08/10/2010	08/11/2010	08/09/2010														
Tonbridge	15 Northdown Road, Tunbridge Wells, Kent, TN2 5LG	KH	Coulson S, 37 Avenue Road, Tonbridge, Kent, TN9 5RD	No	Yes				No			12/09/2010														
Tonbridge	18 Northdown Road, Tonbridge, Kent, TN1 0 3AS	KH	Brightwell F, 19 Western Road, Tonbridge, Kent, TN9 5RS	No	No				No			08/09/2010														
16 Offers																										

© 2011 Pair Software LLP 06 June 2011 09:45

All summary data relevant to offers made is shown including the date of the last offer made. Details of the individual offer can be viewed by clicking on the button in the left hand column.

The property status is indicated by a coloured block at the left hand side of the property address. Clicking on the information button on the quick access toolbar at the top left of the screen will display a popup window which shows the meaning of the colours.

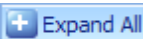
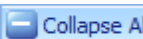
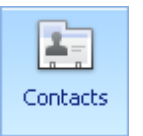
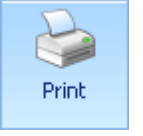
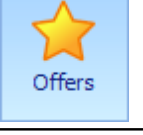
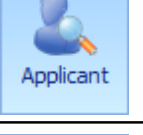
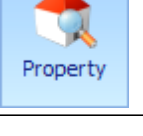


This grid has the ability of being grouped by columns. See [How do I use grid column grouping and filtering?](#) for further information.

RIBBON BAR



The buttons on the ribbon bar have the following functionality:

	Expands all rows showing details of individual offers made.
	Collapses all rows so that the details of individual offers is not shown.
	Displays the Contacts Screen detailing all contacts for the vendor of the selected property and the applicant.
	Prints the grid as it is shown on the screen.
	Opens the Offers Screen for the selected property and focuses to the offer made by the selected applicant.
	Opens the Applicants Screen focused to the selected applicant.
	Opens the Properties Screen focused to the selected property.

5.27 Offers Screen

This screen can be opened from both the [Properties Screen](#) and the [Applicants Screen](#). If opened from the properties screen the offers will be listed by Applicant. If opened from the Applicants screen the offers will be listed by property. This example shows offers by applicant.

OFFERS SCREEN

Applicant	Offer	Date	Time	Init	Sent	Status	Rejected
Van Den Elzen Maria, 18 The Glades, Tonbridge, Kent, TN9 9SR	£875,000	15/01/2017	12:15	KAR	✓	Accepted	✓
Clevedon X, 13 Prince Street, Tonbridge, Kent, TN9 9GB	£850,000	15/01/2017	09:00	KAR	✓	Rejected	24/02/2018
Dempsey C, 14 Deacon Road, Tunbridge Wells, Kent, TN11 1ME	£870,000	15/01/2017	08:16	KAR	✓	Rejected	24/02/2018
Broomfield B, 15 Broomfield Drive, Tonbridge, Kent, TN10 4JN							

Applicant/Property

Applicant
Clevedon X, 13 Prince Street, Tonbridge, Kent, TN9 9GB

If opened from the properties screen the offers will be listed by property. If opened from the Applicants screen the offers will be listed by applicant.

	<p>will be listed by Applicant. If opened from the Applicant's screen the offer will be listed by property.</p> <p>By means of the buttons on the</p>
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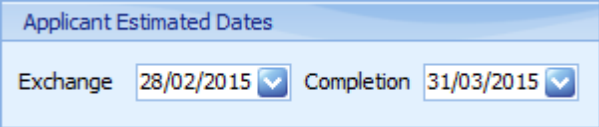
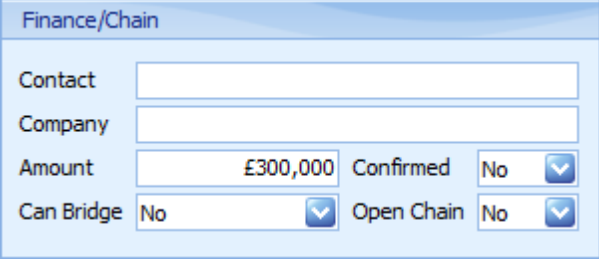
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Adding an offer will automatically set the properties status as 'Under Offer'. Setting an offer as rejected will update the property's status at

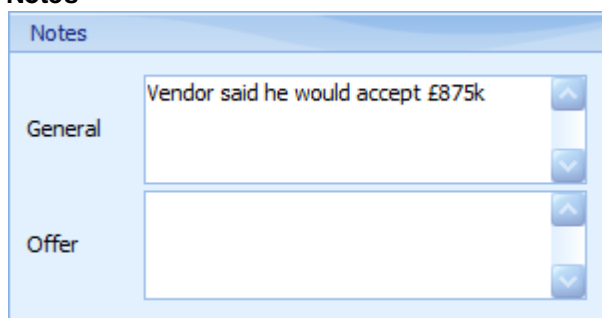
							us to 'Av ail ab le'.
Offer Grid							Off er s ca n be ad de d he re us in g th e na vig ati on bu tto ns as de tai le d ab ov e. If th e ap pli ca nt in cr ea se s hi s off er it sh ou
Offer	Date	Time	Init	Sent	Status	Rejected	
£875,000	03/02/2015	12:15	KAR	<input checked="" type="checkbox"/>	Accepted	<input type="checkbox"/>	
£870,000	30/01/2015	08:16	KAR	<input checked="" type="checkbox"/>	Made	<input type="checkbox"/>	
£850,000	28/01/2015	09:00	KAR	<input checked="" type="checkbox"/>	Made	<input type="checkbox"/>	

	Id be added as a new entry and not just a mended.
Applicant Estimated Dates 	Enter relevant dates if known.
Finance/Chain 	Enter finance details if known at this stage.
Open Viewings	Ope

Open Viewings				
Date	Applicant	Made	Conf	Inf
20/12/2014	Mr Baggings	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

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















Vendor said he would accept £875k


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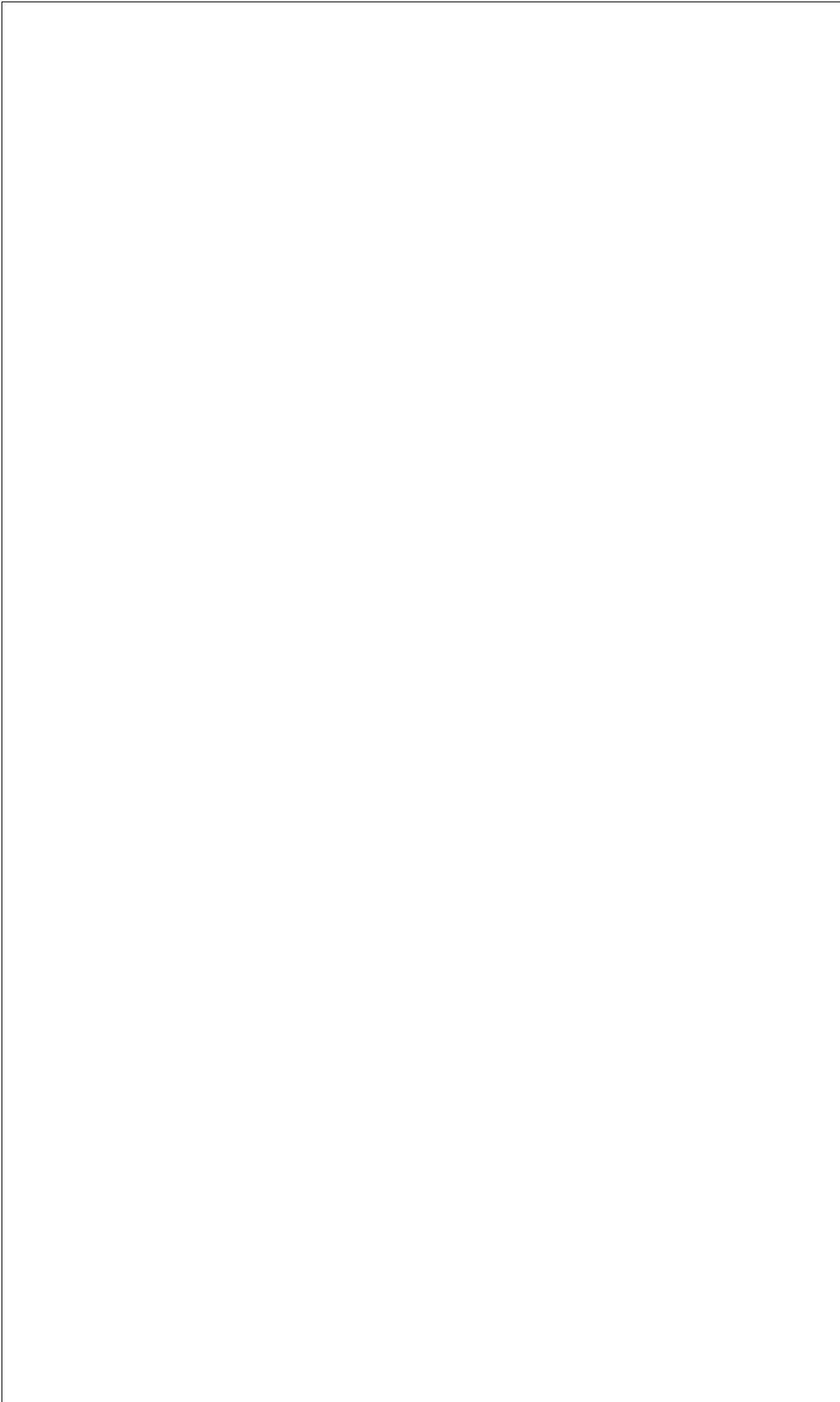
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Contact Details

Contact Details				
	Whom	Number/Email	Detail	
	Primary	020 7491 7777	Home	
	Primary	01892 525448	Work	
	Primary	07872 123456	Ken Randall	
	Primary	ken@pairsoftwhere	Ken Randall	
	Solicitor	01892 121212	J Badger	
	Solicitor	jbadger@badgerso	Badger	
	Additional	01892 565656	Elaine Randa	
	Additional	07877 888888	Elaine Randa	
	Solicitor	01892 777777	Mercantile	
	Solicitor	kmercantile@merca	Mercantile	
	Primary	01892 222444	Home	
	Primary	mariaslove@hotmail	Clevedon	
	Solicitor	01892 777777	Mercantile	
	Solicitor	kmercantile@merca	Mercantile	

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ication will be stored under Draft & Sent Communications of the applicant, vendor, solicitor or estate agent respectively. See the [Cust](#)


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Offer Dated Notes

Offer Dated Notes

Date	Reason	Notes	Init	Method
28/01/2015 10:08	STC Progression	Spoke to vendor and told him that I thought Mr Clevedon may go the asking price if pushed	KC	Spoken

Date related notes can be entered here specific to an applicants offer. See [Ho](#)



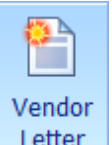








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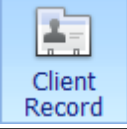
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RIBBON BAR

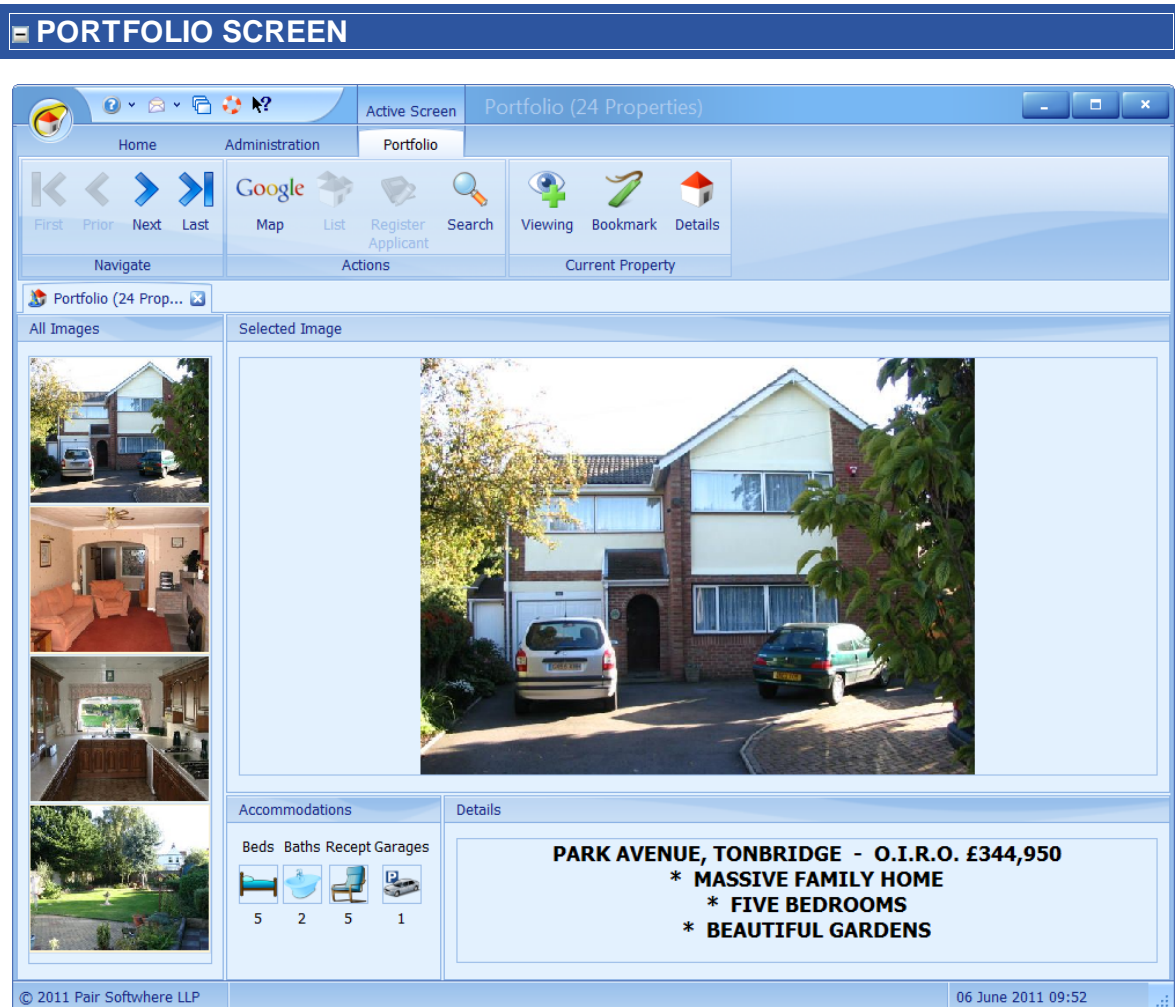
The following buttons are available on the ribbon bar.

 <p>Applicant Letter</p>	<p>Opens the Communications Screen where you can send predefined applicant offer letters to the applicant and/or any additional applicants of the selected offer by either text, email or post. All letters sent are saved and are accessible by clicking on the Draft & Sent Letters button.</p> <p> Please note that only applicant letters that start with the word Offer will be displayed.</p>
 <p>Vendor Letter</p>	<p>Opens the Communications Screen where you can send predefined vendor offer letters to the vendor and/or any additional vendors of the selected offer by either text, email or post. All letters sent are saved and are accessible by clicking on the Draft & Sent Letters button.</p> <p> Please note that only vendor letters that start with the word Offer will be displayed.</p>
 <p>Draft & Sent</p>	<p>Provides details of all communications previously sent to the current applicant. Communications can be resent from this screen. See the Customer Communications Screen for more information.</p>
 <p>Contacts</p>	<p>Displays a list of all contact details for the currently selected applicant including those of the vendor and his solicitor if entered. There are also tabs on the screen for sales chasing, central notes and chain flow. See the Contacts Screen for more information.</p>
 <p>All Offers</p>	<p>Generates a report which can be printed of all offers made on this property by all applicants.</p>
 <p>Selected Offer</p>	<p>Generates a report which can be printed of all offers made on this property by the currently selected applicant.</p>
 <p>Chain</p>	<p>The up and down chains can be recorded here for the currently selected applicant. The current property and the applicant who made the offer are automatically added. See the Chain Flow Screen for more information.</p>
 <p>Viewings</p>	<p>Displays all viewings for the current property. This is disabled if there are no open viewings.</p> <p>See the Viewings Screen for more information.</p>
 <p>Purchaser</p>	<p>If the selected applicant is in the process of purchasing the property the first button will be displayed, otherwise the second button will be displayed.</p> <p>Clicking on either button will open the Applicants Screen focused to them.</p>

 Applicant	
 Property	Clicking on this button will open the respective property in the Properties Screen .
 Solicitor	There are buttons for both the applicant and vendor's solicitors. These buttons enable you to open the respective solicitor's details. They will be disabled if no solicitor is defined.
 Client Record	There are buttons to edit/view both the applicant and vendor's client record.

5.28 Portfolio Screen

If this screen was opened from the Main Screen it defaults to all available properties. If it was opened from the Applicant Screen the list of properties are those that match the respective applicants criteria. This module is designed to be used when seated at a screen that is visible by an applicant. It displays graphically a list of properties one by one according to easily selectable criteria. Properties can be bookmarked and a report of them given to the client. There is an interface to Google Maps so that the location of the properties can easily be seen.



This screen provides an extremely good mechanism for showing an applicant what properties meet their criteria. Properties can be scrolled through by using the Navigate group on the ribbon bar. The main image for each property is initially displayed as the large image. This can be changed by clicking on any other image. All images assigned to a property will be displayed with the exception of EPC's and "Other" images. The number of bedrooms, bathrooms, etc. is shown for each property. If you hold the keys for this property it will be indicated as shown above.

RIBBON BAR

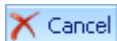
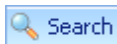


The navigation buttons are self explanatory. The usage of all other buttons is described below.

	<p>Opens the Google Maps interface with the focused property displayed. There is an option to show all other properties.</p> <p>Please refer to the Google Map screen for more information.</p>
	<p>Displays a list of all bookmarked properties including the main image, asking price, location, number of bedrooms, number of bathrooms and summary details. which can be printed.</p> <p>See the Bookmarked Properties Screen for more information</p>
	<p>Enables you to register a new applicant using the search criteria entered here together with outline viewing entries for each property marked as wanted to be viewed.</p>
	<p>Opens a screen enabling you to enter/modify the search criteria used to filter properties to be included here.</p> <p>Please see the Search Criteria section below for more information.</p>
 	<p>Adds an outline viewing for the current property. Also adds a bookmark if it was not already bookmarked. This will toggle the image used for the Viewings button. Click it again to remove the outline viewing.</p>
 	<p>Bookmarks the current property. This will toggle the image used for the Bookmark button. Click it again to remove the bookmark. Removing a bookmark will also remove an outline viewing.</p>
	<p>This will open the Properties Screen focused to the current property.</p>

SEARCH CRITERIA

The search criteria can be entered/modified here and the list of properties regenerated.



Closes this dialog and regenerates the list of properties based on the criteria entered.

Sets the search criteria back to the defaults (the defaults are as shown).

Closes this dialog discarding any changes made.

If this is ticked the Under Offer image will be shown when scrolling through properties as appropriate.

Ticks all property types.

Unticks all property types.



Search	List Heading
Bookmarked Property List	

Any data entered here will be used as a heading when printing the list of properties. This would typically be used to include the name of the applicant.

5.28.1 Bookmarked Properties Screen

This is a summary list of all bookmarked properties selected on the [Portfolio Screen](#).

BOOKMARKED PROPERTIES SCREEN

Bookmarked Properties					
Main Image	Asking Price	Location	Beds	Baths	Summary Details
	£249,000	TONBRIDGE	3	1	A UNIQUE DETACHED BAY FRONTED VICTORIAN STYLE HOUSE SET IN A POPULAR LOCATION IN BROADSTAIRS, WITH THE BENEFIT OF A SEPARATE DETACHED DWELLING IN THE GARDEN. THE MAIN RESIDENCE COMPRISES THREE DOUBLE BEDROOMS, A COLOURED BATHROOM SUITE, LOUNGE, DINING ROOM, KITCHEN AND UTILITY ROOM. THE SEPARATE DETACHED DWELLING CONSISTS OF A GROUND FLOOR ROOM, AND A FIRST FLOOR ROOM WITH AN EN-SUITE W.C. VIEWING IS STRONGLY RECOMMENDED ON THIS UNIQUE PROPERTY.
	£220,000	LAMBERHURST	3	2	A SPACIOUS MODERN DETACHED THREE RECEPTION, FIVE BEDROOM FAMILY HOUSE LOCATED IN A SELECT AND SIGHT AFTER DEVELOPMENT ON A CORNER PLOT POSITION. THE PROPERTY BENEFITS FROM SEALED UNIT DOUBLE GLAZING, GAS CENTRAL HEATING AND AN INTEGRAL DOUBLE GARAGE.

Clicking on the  button prints the thumbnail image report containing these properties.

5.29 Property Review Screen

The Property Review screen is where properties are reviewed based on the review cycle set (default 30 days) set for the property.

PROPERTY REVIEW SCREEN

Property Review

Home Administration **Property Review**

As Of: 21/08/2020 | Archive | Refresh | Preset | Tomorrow | 1 Week | 1 Month

Action | Review | Communications | Buying thru Us | Mr & Mrs K Cork | Sales | Property

Drag a column header here to group by that column

Branch	Address	Vendor/Land	Solicitor	Sale/Rent	Status	Neg	Sales Neg	Val	Price	Reg Date	Reviewed
KEY	1 Blands Drive, Tonbridge, K6 Bland & Co Ltd	Mr K Mercantile	Sale	Exchanged	KC (CRO)			CE	£229,999	01/01/2018	11/07/2020
CRO	1 Lonsdale Avenue, Tonbridge	Lonsdale, G	Rent	Let Agreed	KC (CRO)				£245,000	01/01/2018	23/10/2019
CRO	1 St Patricks Mews, Tonbridge	Dunlop, P	Mrs J Badger, J Sale	Withdrawn					£159,995	01/01/2018	02/12/2015
KEY	1 Sweetlands, Keymer, Hassc	Gilbert, E.	Rent	Let Agreed	AD			KC	£285,000	01/01/2018	06/03/2019
CRO	11 Brick Street, Westminster	Randall, KA	Mrs YYY, YYY Sale	Withdrawn	KC (MA KC (CRO)			KC	£999,995	01/01/2018	07/02/2020
CRO	12 Green Road, Tonbridge	K Green, G	Sale	Withdrawn					£236,995	01/01/2018	06/03/2019
CRO	13 Cedar Close, Tunbridge W	Cardogan, A	Mrs YYY, YYY Sale	Exchanged	KC (MAR)				£134,995	01/01/2018	28/07/2015
CRO	15 Broomfield Drive, Tonbridge	Monk, G	Sale	Sale Agreed	KC (CRO)				£225,000	01/01/2018	30/01/2013
CRO	24 Coronation Road, Tonbridge	Coronation, C	Sale	Sale Agreed	KC (CRO)				£135,000	01/01/2018	06/03/2019
CRO	25 Green Road, Tonbridge	K Grober, G	Sale	Completed (Pak AD					£249,995	01/01/2018	30/01/2013
CRO	40 Northumberland Avenue, North, N		Sale	Sale Agreed	KC (CRO)				£219,995	01/01/2018	20/01/2015
CRO	41 Gloucester Avenue, Tunbridge	Gloucester, G	Mrs J Badger, J Sale	Sale Agreed	KC (CRO)				£208,000	01/01/2018	03/01/2018
CRO	62 West Drive, Tunbridge W	West, W	Sale	Completed	KC (CRO)				£159,995	01/01/2018	06/03/2019
CRO	66 Trenton Road, Alton, Han	Bland & Co Ltd	Mr K Mercantile Sale	Sale Agreed	KC (CRO)				£229,995	01/01/2018	11/07/2020
CRO	8 Journeys End, Tonbridge, J	Xxxx	Mrs J Badger, J Sale	Sale Agreed	KC (CRO)				£175,000	01/01/2018	10/03/2015
CRO	Flat 2, 125 West Street, Tun	Alen, M	Rent	Let					£850	01/01/2018	11/09/2018
CRO	Flat 8 Golden Court, Grove O	Gold, G	Sale	Sale Agreed	KC (CRO)				£89,995	01/01/2018	30/01/2013
CRO	New House, Lamberhurst Vn	Newton, N	Sale	Under Offer					£220,000	01/01/2018	30/01/2013
CRO	Old Cottage, Wadhurst Road, Old, O		Sale	Sale Agreed	KC (CRO)				£300,000	01/01/2018	30/01/2013

19 Properties

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This screen can be broken down into 4 primary areas.


PROPERTY LIST

Drag a column header here to group by that column

Branch	Address	Vendor/Land	Solicitor	Sale/Rent	Status	Neg	Sales Neg	Val	Price	Reg Date	Reviewed
KEY	1 Blands Drive, Tonbridge, Kent	Bland & Co Ltd	Mr K Mercantile	Sale	Exchanged		KC (MAR)	KC	£229,999	01/01/2018	11/07/2020
CRO	1 Lonsdale Avenue, Tonbridge	Lonsdale, G		Rent	Let Agreed	KC (CRO)		CE	£245,000	01/01/2018	23/10/2019
CRO	1 St Patricks Mews, Tonbridge	Dunlop, P	Mrs J Badger, E	Sale	Withdrawn				£159,995	01/01/2018	02/12/2015
KEY	1 Sweetlands, Keymer, Hassocks	Gilbert, E.		Rent	Let Agreed	AD		KC	£285,000	01/01/2018	06/03/2019
CRO	11 Brick Street, Westminster	Randall, KA	Mrs YYY, YYY	Sale	Withdrawn	KC (MA)	KC (CRO)	KC	£999,995	01/01/2018	07/02/2020
CRO	12 Green Road, Tonbridge	K Green, G		Sale	Withdrawn				£236,995	01/01/2018	06/03/2019
CRO	13 Cedar Close, Tunbridge Wells	Cardogan, A	Mrs YYY, YYY	Sale	Exchanged		KC (MAR)		£134,995	01/01/2018	28/07/2015
CRO	15 Broomfield Drive, Tonbridge	Monk, G		Sale	Sale Agreed	KC (CRO)	KC (CRO)		£225,000	01/01/2018	30/01/2013
CRO	24 Coronation Road, Tonbridge	Coronation, C		Sale	Sale Agreed				£135,000	01/01/2018	06/03/2019
CRO	25 Green Road, Tonbridge	K Grober, G		Sale	Completed (Paid)	AD			£249,995	01/01/2018	30/01/2013
CRO	40 Northumberland Avenue, North	N		Sale	Sale Agreed		KC (CRO)		£219,995	01/01/2018	20/01/2015
CRO	41 Gloucester Avenue, Tunbridge Wells	Gloucester, G	Mrs J Badger, E	Sale	Sale Agreed		KC (CRO)		£208,000	01/01/2018	03/01/2018
CRO	62 West Drive, Tunbridge Wells	West, W		Sale	Completed	KC (CRO)			£159,995	01/01/2018	06/03/2019
CRO	66 Trenton Road, Alton, Hampshire	Bland & Co Ltd	Mr K Mercantile	Sale	Sale Agreed		KC (CRO)		£229,995	01/01/2018	11/07/2020
CRO	8 Journeys End, Tonbridge	H Xxxx	Mrs J Badger, E	Sale	Sale Agreed		KC (CRO)		£175,000	01/01/2018	10/03/2015
CRO	Flat 2, 125 West Street, Tunbridge Wells	Alen, M		Rent	Let				£850	01/01/2018	11/09/2018
CRO	Flat 8 Golden Court, Grove Road	Gold, G		Sale	Sale Agreed	KC (CRO)	KC (CRO)		£89,995	01/01/2018	30/01/2013
CRO	New House, Lamberhurst	Vin Newton, N		Sale	Under Offer				£220,000	01/01/2018	30/01/2013
CRO	Old Cottage, Wadhurst Road, Old	O		Sale	Sale Agreed		KC (CRO)		£300,000	01/01/2018	30/01/2013


19 Properties

This grid contains all properties that are due for review. Certain columns can be dragged to the group area as indicated.

The status of the property is also indicated by a coloured block at the left hand side of the grid. Clicking on the information  button will display a pop-up window detailing the meaning of the colours.

The statuses that appear in this review can be configured by your system administrator.

Double clicking on a property will either open the property screen or the Sales/Rental screen depending on the status of the property.


 This grid has the ability of being grouped and filtered by columns. See [How do I use grid column grouping and filtering?](#) for further information.


CONTACT DETAILS


Contact Details

Whom	Number/Email	Detail
Primary	020 7491 7777	Home
Primary	01892 525448	Work
Primary	07872 123456	Ken Randall
Primary	ken@pairsoftwher	Ken Randall
Solicitor	01892 121212	J Badger
Solicitor	jbadger@badgersc	Badger
Additional	01892 565656	Elaine Randa


These are the contact details that have been entered for the focused client.

The  button can be used to undock (expand) the panel to make it easier to see multiple entries.

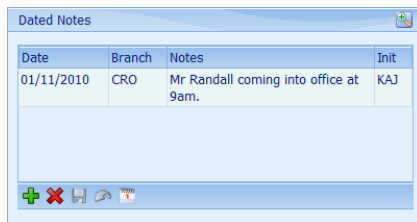
Clicking on the  button will open the [SMS Text Messaging Screen](#) to send a message. This has to be configured and additional charges apply.

Clicking on the  button will open the [Email Screen](#) enabling you to send an email.


Both of these types of communication will be stored under Draft & Sent Communications of the client. See the [Customer Communications Screen](#) for further information.


Double clicking on the  button will undock this panel making it larger for ease of use.

DATED NOTES



Client date related notes can be entered here. See [How do I use the navigation buttons?](#) for further help on the navigation bar.

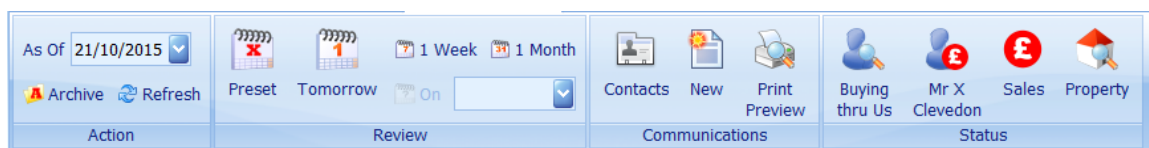
The  button can be used to undock (expand) the panel to make it easier to see multiple entries.

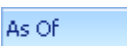
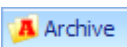
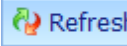
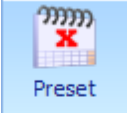


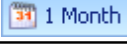
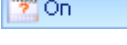
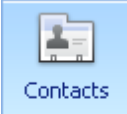

The  button can be used to enter the note entered into the diary on the date entered.






Double clicking on the  button will undock this panel making it larger for ease of use.

By default historic dated notes cannot be changed.

RIBBON BAR



	Repopulates the properties grid with reviews that are due on the date entered. This is handy if for example you will be out of the office for a week so want to review them in advance now.
	The property and vendor can be deleted (archived) directly from this screen if you believe nothing further is going to happen with them.
	Refreshes the current list of properties.
	Sets the next review date for that preset for the vendor and removes the property from the list.
	Sets the review date for tomorrow and removes the property from the list.
	Sets the review date for 1 weeks time and removes the property from the list.
	Sets the review date for 1 months time and removes the property from the list.
	Sets the next review date as the date entered and removes the property from the list. This option is disabled until a date is entered.
	Displays a list of all contact details for the vendor.
	Opens the Communications Screen for the sending of letters via email, SMS, etc for the vendor of the currently selected property.

 Print	Prints the grid.
 Buying thru Us	If this button is enabled it is an indication that the vendor is also buying a property through you. Clicking on this button will open the Applicants Screen for them.
 Mrs P Stephens	If a purchaser is assigned to this property this button is enabled and clicking on it will open the Applicants Screen for them.
 Sales	<p>Displays the Sales/Rental Status Screen for the current property where the property's status can be changed and details relating to the sale can be recorded.</p> <p>See the Sales/Rent Status Screen for more information.</p>
 Property	Clicking on this button will open the Properties Screen focused to the selected property.

5.30 Properties Screen










The properties screen is where all details relating to properties can be recorded including vendor details, communications, images, property particulars, chain flow, viewings, offers, sales and matches against applicants. By default all active (non-archived) properties are displayed.

PROPERTIES SCREEN

See [How do I add a property?](#)


This screen can be broken down into three primary areas.

LIST OF PROPERTIES

	<p>By default this grid contains a list of all active (non-archived) properties. By means of the buttons on the toolbar at the bottom left of the grid, properties can be added , deleted (archived) , saved , cancel any changes , have information displayed  and be filtered on .</p> <p>To search for a specific property any part of the address string can be entered in to the search field, which is case insensitive. Once entered either press the enter key or one of the search buttons:  search from beginning,  search for next occurrence of the search string or  search for previous occurrence of the search string.</p>	
--	---	--

See [How do I filter properties?](#) for an example of using the filter button.

You can also move between properties by clicking on the property or using the progressive search facility. For example if, when the grid is focused, you press the **2** key it will move to **2 Magdalen Road**, if you then press the **5** key it will move to **25 Green Road** and so on.

Clicking on the information  button will display a popup window which is shown on the right which corresponds with the coloured blocks shown against each property.

The tabs at the top of the list are different ways of displaying the list. The default is by address and that is the one shown. The other 3 are by vendor name, property reference and street. They are purely used as different search mechanisms. e.g the vendor is on the phone and just gives you his name!

PROPERTY TAB

Property
Advanced
Vendor: Mr Ken Randall

Basic Information

Ask Price
Sale price

Branch

Has to Buy

Negotiator

Sale/Rent

Status

Tax Band

Vacant

Address

Authority

Price Details

Classifications

Tenure
Rightmove

Type
Style

Age
Garden

Location
Area

Garaging

Vendor Classifications

Salesperson

Keys/Alarm Details

Property Notes

Dated Notes

Date	Reason	Branch	Initials	Notes	Method
31/05/2018	Inbound Call	CRO	KAJ	Mr Randall coming into office at 9am.	Spoken
02/05/2018	Viewing Fee	CRO	KC	Vendor updated	Spoken

Accommodation (Summary)

Bedrooms
Bathrooms


Receptions
Garages

Sq. Feet

Contact Details

Number\Email	Detail
020 7491 7777	Home
01892 525448	Work
07872 123456	
ken@estateagentpro.com	
01892 565656	Mrs Randall
07877 888888	Mrs Randall

An explanation of each of the areas is given below. For help on adding a new property please refer to [How do I add a property?](#)

Basic Information	
Ask Price	£895,000
Sale price	£875,000
Branch	Tonbridge
Has to Buy	No
Negotiator	CE
Sale/Rent	Sale
Status	Sale Agreed
Tax Band	G
Vacant	No
	
<div> <div>1 of 8</div> <div>Navigation icons: back, forward, first, last</div> </div>	
Address	The Old Barn Tunbridge Wells Kent TN2 5HS
Authority	Tonbridge County Council
Price Details	OFFERS ABOVE <PRICE>

The **main image** is displayed by default. Images can be scrolled using the navigation bar beneath the image.

The **Ask Price** is the price the vendor wants the property marketed at.

The **Branch** that manages this property can be changed if you have been given permission to do so by your system administrator. This does not change the underlying property reference but it does affect which branch this property is uploaded under to any portals and/or your own web site. It also changes which branch reviews the property/vendor. If you do not have access to change this, or you only have one branch configured, then this will be disabled..

Indicates whether or not the vendor **has to sell** this property in order to purchase another.

Select the **Negotiator** dealing with this property from the drop down list.

The default is configurable by your system administrator. Select **Sale or Rent** from the drop down list. Input fields are added/removed dependent on the selection.

The **status** of the property (cannot be changed here).

Select the appropriate council **tax band**. This defaults to unknown. If accidentally set to the wrong tax band it can be set back to unknown by pressing the **Del** key when the tax band field is selected.

Indicates whether the property is **vacant** or not.

To change the property **address** click on the button on the right hand side of the address. This will display the Address Details screen where the new address can be entered. See the [Address Screen](#) for further information.

Local **authority** applicable. The default is configurable by your system administrator.

The **price details** that you wish to appear in property particulars, reports, your website and property portals. In the example given the price details will show in reports as "OFFERS INVITED ABOVE £895,000". See [How do I use price qualifiers \(POA,OIRO. etc...\)?](#) for further information.

Accommodation (Summary)

Bedrooms	4			Bathrooms	3		
Receptions	4			Garages	2		
Sq. Feet	3,100						

Enter the number of bedrooms, bathrooms, etc. that the property has. The square footage can also be entered here if known.

Classifications

Tenure	Freehold	
Type	House	
Style	Detached	
Age	Period	
Garden	3+ acres	
Location	Non-Estate	
Area	Rural	
Garaging	Garage	

Property classifications are configurable by your system administrator. Up to ten classifications can be defined.

An entry must be completed for each classification. This is mandatory once the property becomes available.

Keys/Alarm Details

Alarmed		Quantity Held	0		
Key Number	0			Key Letter	
Code	<input type="text"/>				


The Key/Alarm Details panel is initially collapsed for security purposes when the screen is first opened. If you hold keys for a property then the relevant information can be entered here. The alarm code will be masked, to display it, double click on the **Code** box.

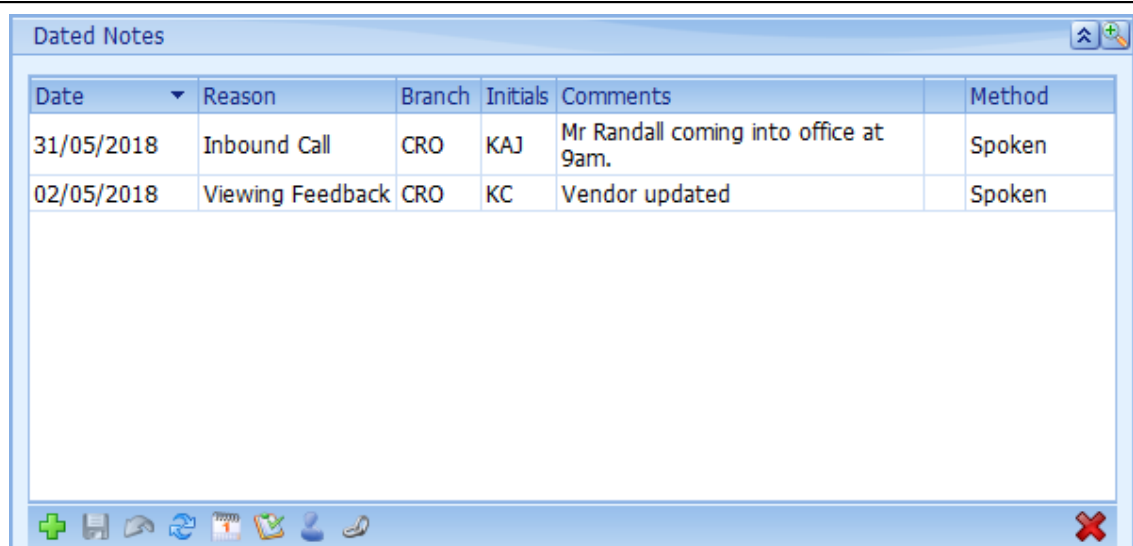
Property Notes

Will consider any offer above £825k.

Enter any other relevant notes applicable to the property. Vendor notes can be added under the


[Vendors Tab.](#)


The  button can be used to undock (expand) the panel to make it easier to see larger notes although it is recommended that these notes are kept to what can be seen by default.





Date	Reason	Branch	Initials	Comments	Method
31/05/2018	Inbound Call	CRO	KAJ	Mr Randall coming into office at 9am.	Spoken
02/05/2018	Viewing Feedback	CRO	KC	Vendor updated	Spoken

Date related notes can be entered here. See [How do I use the navigation buttons?](#) for further help on the navigation bar.

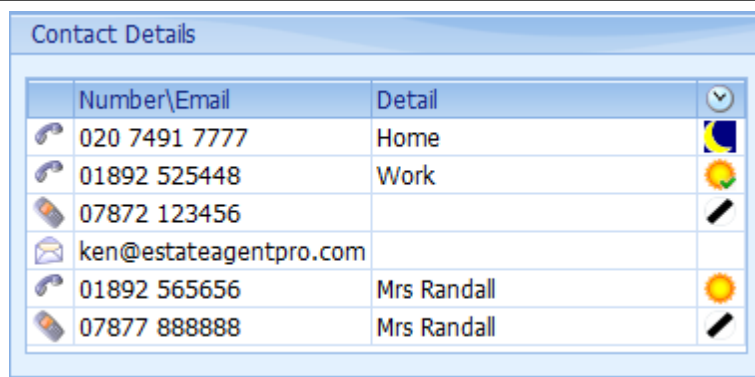
The  button can be used to enter the note entered into the diary on the date entered.

The  button can be used to undock (expand) the panel to make it easier to see multiple entries.

Clicking on the  button will display the [Copy Dated Note](#) screen allowing you to select the applicant you want to copy the dated note to. If there is an associated applicant he/she will be automatically selected. The copy of the dated note can be amended before saving. Clicking on the  button will likewise give the ability to add the selected dated note to any property in the chain.

Reason and Method can be configured by your EAT System Administrator and by default are not mandatory.

By default previously entered dated notes cannot be changed.



Number\Email	Detail
020 7491 7777	Home
01892 525448	Work
07872 123456	
ken@estateagentpro.com	
01892 565656	Mrs Randall
07877 888888	Mrs Randall













If the screen height is sufficient the contact details will be shown here as well as on the [Vendors Tab.](#)


























These are the contact details that have been entered for the client. These can be changed by clicking on the button on the right hand side of the client's name and address in the Details section of the [Vendors Tab](#).






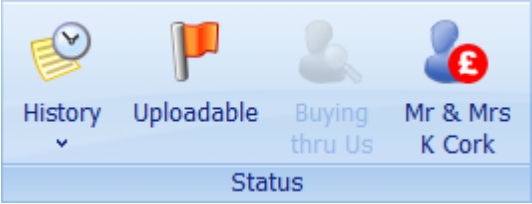




See [How do I use the contact details grid?](#) for further information on how to use this grid.

RIBBON BAR

The ribbon bar is broken into 4 groups.

 Match  Offers  Register  Clone Property  Map  Portfolio Actions	
	<p>Opens the Matching Screen where you can specify a combination of options for running the match. These options include: new applicants, previously matched applicants, only those belonging to a negotiator and applicant statuses. Once the options are set, the match is run against all the applicant records in your database, matching their criteria with the property, unless they are excluded by the options set. Once the matching is complete the Applicant/Property Matching Screen will be displayed where you can choose to communicate the results of the matching process to the applicant by text, email or letter. Only available, under offer and sale agreed properties can be matched. If a match is attempted against a sale agreed property confirmation will be required.</p>
	<p>Offers made against a property are entered here. Facilitates the entry of multiple offers by multiple applicants. The colour of the star will indicate the status of the most recent offer. Grey - None made, Yellow - made, Green - Accepted, If the property is for rent this button will be disabled.</p> <p>See the Offers Screen for more information.</p>
	<p>Provides an easy means of registering the current vendor as an applicant without having to fill in all of the details again. The applicants screen is then opened at their entry so that you can complete the other details.</p>
	<p>Provides the ability to clone (copy) the current property as a new property. This is particularly useful in new build situations where several similar properties are for sale.</p> <p>See the Clone Property Screen for more information.</p>
	<p>Opens the Google Maps interface with the focused property displayed. There is an option to show all other properties.</p> <p>See the Google Map screen for more information.</p>
	<p>The portfolio screen is designed to be used when seated at a screen that is visible by an applicant or vendor. When invoked from the property screen only the current property will be displayed. There is an interface to Google Maps so that the location of the property can easily be seen. See the Portfolio Screen for more information.</p>

<div>  New  Draft & Sent  Contacts  Mercantile & Rolfe </div> <div>Communications</div>	
	<p>Opens the letters screen where you can send predefined letters to the vendor by either text, email or post. All letters sent are saved and are accessible by clicking on the Draft & Sent Letters button.</p> <p>See the Communications Screen for more information.</p>
	<p>Provides details of all communications previously sent to the current vendor. Communications can be resent from this screen.</p> <p>See the Customer Communications Screen for more information.</p>
	<p>Displays a list of all contact details for this client including those of the purchaser (if applicable) and their solicitor if relevant. There are also tabs on the screen for sales chasing, central notes and chain flow.</p> <p>See the Contacts Screen for more information.</p>
	<p>If a solicitor is set for the vendor the company name will be displayed under the image. If not this button will be disabled.</p> <p>Clicking on this button will display the solicitor's details.</p>
<div>  Advertising  Chain  EPC  Images  Lease  Particulars  Sales  Surveys  Valuation  Viewings  AML Risk Score </div> <div>Property Links</div>	
	<p>This opens the screen where all advertising information including display boards can be entered.</p> <p>See the Advertising Screen for more information</p>
	<p>The up and down chains can be recorded here for properties under offer and sale agreed. The current property and the purchaser are automatically added.</p> <p>See the Chain Flow Screen for more information.</p>
	<p>Load the screen for generating an EPC image. Also can be used for the recording of ordering of EPC and HIPS.</p> <p>See the EPC Screen for further details.</p>
	<p>This is where all images related to the property can be loaded. They can also be edited, re-sized, etc.</p> <p>See the Images Screen for more information.</p>
	<p>Lease details can be recorded here.</p> <p>See the Lease Screen for more information.</p>
	<p>The details for the property particulars can be entered and generated from here.</p>

	See the Particulars Screen for more information.
	Displays the Sales Status Screen for the current property where the property's status can be changed and details relating to the sale can be recorded. See the Sales/Rent Status Screen for more information.
	Surveys can be recorded on this screen whether they be for a mortgage or any other purpose. See the Survey Screen for more information.
	You can schedule the valuation of the property here and once done update it with the appropriate information. Directions from your office to the property can also be generated here. See the Valuation Screen for more information.
	Opens the viewing screen for the current property displaying a list of all viewings made and the status of them. Existing viewings can be updated and new viewings can also be entered. Offers can also be added from this screen. See the Viewings Screen for more information.
	Opens the Advanced Money Laundering (AML) screen which enables you to select the underlying elements on which it basis the score. See the Advanced Money Laundering (AML) Screen for more information.
	
	<p>Various Historical data can be displayed from this drop down list.</p> <div data-bbox="363 1328 643 1462"> <ul style="list-style-type: none"> Advertisements Applicants who Viewed this Property Events Open Matches Price History Report </div> <p>Displays the Advertisements Screen where adverts placed in newspapers can be recorded.</p> <p>Displays a list of applicants who have viewed the current property.</p> <p>Displays the Event History Screen associated with the current property including items such as matches, viewings, offers, sent communications, etc.</p> <p>Opens the Matches Review Screen where all open matches for the current property are displayed.</p> <p>Generates a report which can be printed of all price changes recorded for this property.</p>
	If all information has been correctly entered this flag will be green. If it is red, clicking on it will list the reasons why it is not uploadable to your website and property portals. If it is amber the property is still uploadable, but with factors that you should be aware of. Please click on it for details.
	This is purely an indication of whether or not the current vendor is also buying a property through you. If they are, this button is enabled and clicking on it will open the Applicants Screen for them.
	This is purely an indication of whether or not a purchaser is assigned to this property. If one

	is, this button is enabled and clicking on it will open the Applicants Screen for them.
--	---

Information on the other tabs on the properties screen is available here:

[Vendors Tab](#)

5.30.1 Advertising Screen

This screen contains all fields that are related to advertising the current property and itself consists of 5 tabs.

GENERAL TAB

General		Accommodation	Display Board	Key Features	Online Documents
Advert Address <input type="text" value="Tunbridge Wells"/>		Web Address <input type="text" value="Tunbridge Wells"/> Market as 'Available' <input checked="" type="checkbox"/>			
Configured Portals/Website that this property should be to uploaded to					
Uploads <input type="text" value="All"/>					
Property Details PDF Template <input type="text"/> <input type="button" value="View"/>					
Advert & Portal Text (72 of 255 characters) <div style="border: 1px solid #ccc; padding: 10px; min-height: 150px;"> * Grade II Listed Barn Conversion * 3½ Acre Paddocks * Superb Location </div>					

The **Advert** and **Web Address** fields provide an alternative to the default display address, which uses the Town & County fields. If used these will appear on reports, websites and, if the associated merge fields are used in EAP or Word templates, the property particulars.

For example, if a property is in Neville Park, Tunbridge Wells, Kent, it's default display address will be: Tunbridge Wells, Kent. However if you enter: Neville Park, Tunbridge Wells, this would be displayed instead.

The Adverts address is used in the reports generated within EAP and the Web address is used on any property portal that your EAP data is uploaded to, providing they support this field. If you are also using EAP to drive your own website it can also appear there.

Market As 'Available' is only active if a property has a sale status of Sale Agreed, if ticked the property will continue to appear as Available on websites that your EAP data is uploaded to.

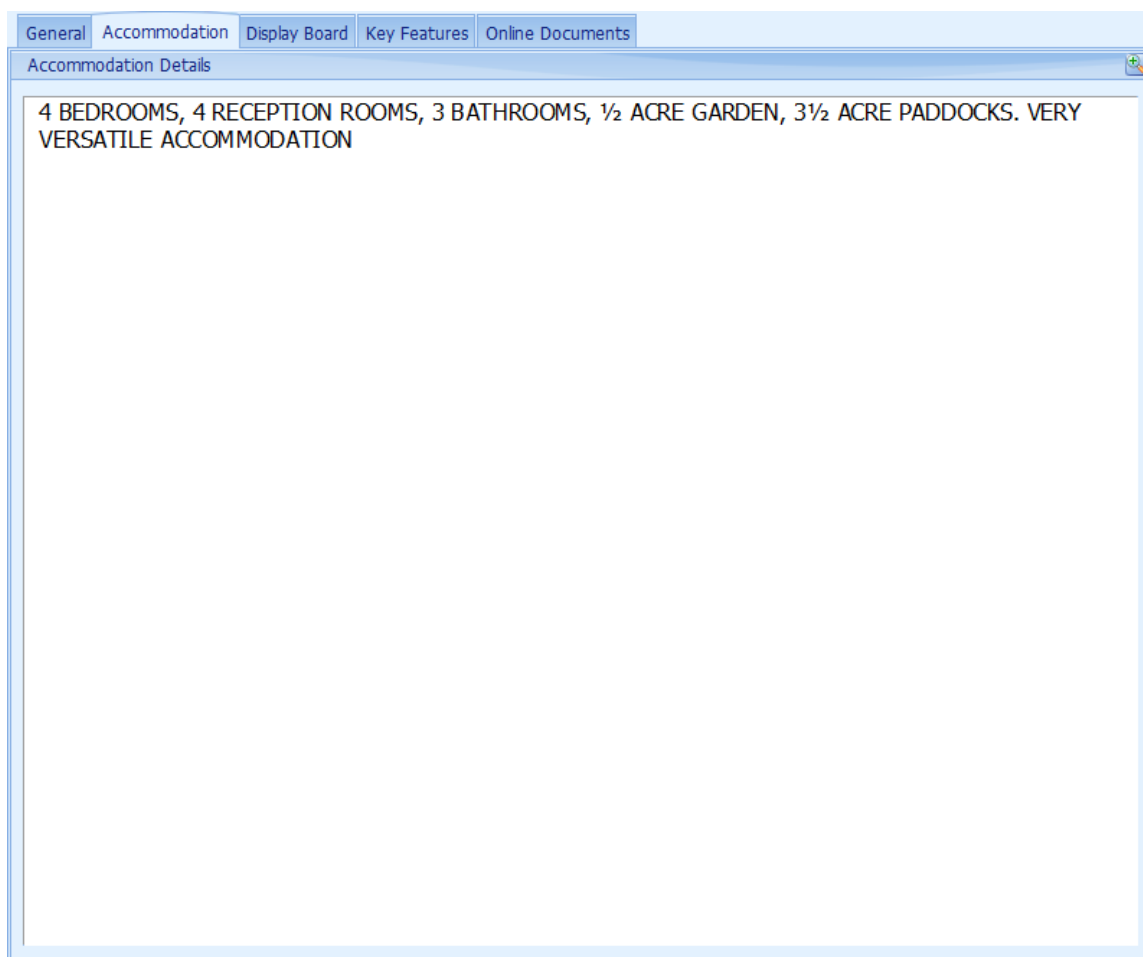
If vendors do not want their property to appear on any of the websites you normally send your EAP data to, unticking the **Web Enabled** checkbox will prevent it appearing, whatever it's property status.

The **Configured Portals/Website that this property should be uploaded to** drop down check box can only be selected if your system administrator has configured which portals/website you upload to. If done this enables you to upload the current property to specific portals rather than the default of all.


Property Details PDF can be used to upload any of your property templates for the current property to Rightmove and other portals that use the Rightmove file format.

As well as being used in the EAP standard reports, the **Advert & Portal Text** will be uploaded to internet property portals such as Rightmove as the 'Summary' text. The number of characters for this field is limited, due to the limit set by Rightmove and other property portals. If the Summary text field on the Particulars tab is filled in first, the text from it, up to the character limit, is automatically copied to the field, but only if it is blank. If necessary the text can then be edited accordingly. Any further editing of the summary field will not update the Advert & Portal field. The number of allowed characters in the field can be changed by your system administrator.

■ ACCOMMODATION TAB



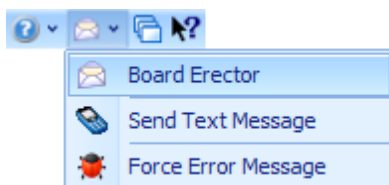
The screenshot shows a software interface with a tabbed menu at the top: 'General', 'Accommodation', 'Display Board', 'Key Features', and 'Online Documents'. The 'Accommodation' tab is selected. Below the tabs is a window titled 'Accommodation Details' with a maximize button. Inside the window is a large text area containing the text: '4 BEDROOMS, 4 RECEPTION ROOMS, 3 BATHROOMS, 1/2 ACRE GARDEN, 3 1/2 ACRE PADDOCKS. VERY VERSATILE ACCOMMODATION'. A small icon with a plus sign and a magnifying glass is located in the bottom right corner of the text area.

The Accommodation Details can be used as an alternative rich text field to the 'Full Details' field on the Particulars tab. It is normally used on local 'in house' advertising rather than on the internet where the Full details field on the Particulars tab is used. It is useful if you would like to have more than one type of Particulars for a property. The  button can be used to undock (expand) the panel to make it easier to deal with larger entries.

DISPLAY BOARD TAB

General	Accommodation	Display Board	Key Features	Online Documents
Board Type <input type="text" value="For Sale"/> Date Erected <input type="text" value="31/07/2010"/>				
Comments				

This tab is used to record what type of Board has been installed at a property and when. The details entered here can be sent to your board erector as an email. The board erector has to be defined in Admin, once this has been done you can use the general communication button on the main page to email them.



It will also email the 'Comments'.

The details are also used in the Property report 'Sale Boards Location'.

KEY FEATURES TAB

General	Accommodation	Display Board	Key Features	Online Documents
Bullet Points				
<p>A BEAUTIFUL GRADE II LISTED BARN CONVERSION (C 1750) A WEALTH OF EXPOSED BEAMS VERY VERSATILE ACCOMMODATION 4 BEDROOMS, 4 RECEPTION ROOMS, 3 BATHROOMS LUXURY FITTED KITCHEN ½ ACRE LANDSCAPED GARDENS 3½ ACRE PADDOCKS WITH FIELD SHELTER/STABLES THIS PROPERTY IS LOCATED IN AN AREA DECLARED AS BEING OF OUTSTANDING NATURAL BEAUTY</p>				

This should be a bullet point list of the property's main features. This text can be used in property particulars and can also be uploaded to websites and property portals.



Each feature should be on a separate line and does not require a preceding bullet point character. The bullet point character should be handled by formatting of the merge field on the Particulars template or by the website, as appropriate.

ONLINE DOCUMENTS TAB

General	Accommodation	Display Board	Key Features	Online Documents
Brochure	<input type="text"/>			
Floorplan	<input type="text" value="http://content.metropix.com/p/456789"/>			
Virtual Tour	<input type="text"/>			
HIP/EPC	<input type="text"/>			

The purpose of this screen is to pass a link to portals that have that capability. This is only applicable to portals that use the Rightmove upload format.

The default link can be configured by your system administrator.

 Double clicking on any header panel that contains the zoom  button will undock the panel making it larger for ease of use.

TENANCY FEES TAB

For rental properties there is an additional tab for the recording of tenancy fees which are now a legal requirement. The contents of this field will be passed to Rightmove and any other portals that use the Rightmove V3 interface.

The screenshot shows a software interface with a horizontal tab bar at the top. The tabs are labeled: General, Accommodation, Display Board, Key Features, Online Documents, and Tenancy Fees. The 'Tenancy Fees' tab is currently selected and highlighted. Below the tab bar is a large, empty rectangular text area for recording tenancy fees. A vertical scrollbar is visible on the right side of this text area, indicating it can be scrolled.

5.30.2 EPC Screen

This screen allows you to record the ordering progress of EPC's and to create the EPC charts and is only accessible from the [Properties Screen](#).

The screenshot shows the EPC screen for 'The Old Barn, Tunbridge Wells (CRO0000068)'. The interface includes a top navigation bar with 'Home' and 'Administration' tabs, and a sub-tab 'EPC'. Below this is a toolbar with buttons for 'Save & Exit', 'Cancel & Exit', 'Load EPC', 'Display EPC', and 'Clear EPC'. The main area is divided into several sections:

- Energy Efficiency Rating:** A chart showing energy efficiency levels from A (Very energy efficient) to G (Not energy efficient). The current rating is 75 (D) and the potential rating is 85 (B).
- Environmental Impact CO2 Rating:** A chart showing CO2 emissions levels from A (Very environmentally friendly) to G (Not environmentally friendly). The current rating is 77 (D) and the potential rating is 84 (B).
- Property Details:** THE OLD BARN, TUNBRIDGE WELLS, KENT, TN2 5HS. The Energy Rating is C.
- Valid Until:** 13 October 2030.
- Certificate Number:** 1111-2222-3333-4444-5555.
- EPC Section:**
 - Provider:** The New EPC Co
 - Notes:** Rush order, promised by next day
 - Ordered By:** KAR
 - Ordered:** 31/08/2010
 - Completed:** 01/09/2010
 - Received:** 02/09/2010
 - Added to Particulars:** Yes
 - Date Added:** 02/09/2010
 - Added By:** KAR
 - EPC Certificate No.:** 1111-2222-3333-4444-5555
 - Valid Until:** 13/10/2030
 - Use New Style:** Yes

The footer shows '© 2020 Estate Agent Pro Ltd', 'Logged in as Ken/Tonbridge', and the date '16 October 2020 13:56'.

Once you have received the ratings from your EPC provider all you have to do is record the values for each chart.

To do this you can drag the Current and Potential markers up or down with the mouse. If you need more precise tuning you can use the up, down, page up, page down, home and end keyboard keys. You can move between the Current and Potential columns by using the left and right keys on your keyboard.

When the changes to the current property are saved the two EPC charts will be recorded in the respective section of the [Images Screen](#). There is no need for you to do anything else. The images will be automatically uploaded to your website and property portals.

The government has specified that EIR charts are no longer to be used. This can be specified by setting the **Use New Style** option. This is the default for new properties. If the flag is set then the EPC Certificate image will be generated. If not, the EIR image will be generated. The EPC Certificate image will not be uploaded to Rightmove, etc. until a **certificate number** and **valid until** date has been entered. There is a setting in Admin>Options to turn off the display of the house name/number.

If you wish to display the full EPC on Rightmove and other portals that use the Rightmove file format then the PDF can be loaded by clicking on the Load EPC button. Optionally, if your certificate is available online it can be entered in the Online Documents tab of the Advertising screen.

If you are a Scottish agent; the recording of the HIP order process can also be recorded here by your system administrator changing a setting in Admin>Options>Property/Vendor>Options. HIPS is

disabled by default.

5.30.3 Lease Screen

This screen is for entering information regarding the lease and is only visible when the tenure is set to leasehold. This screen is only accessible from the [Properties Screen](#).

Lease - 1 Blands Drive, Tonbridge (KEY0002059)

Home Administration Lease

Save & Exit Cancel & Exit Files

1 Blands Drive, Tonbridge (KEY0002059) Lease - 1 Blands Drive, Tonbridge (KEY0002059)

Agent: Jones Brenda, Tonbridge Estate Agents, Tonbridge

Commencement Date: [dropdown]

Copy of Lease Available: Yes

Fixed: No

Ground Rent Per Annum: £60

Insurances Included: No

Maintenance Charge: £100

No of Years: 125

Sitting Tenants: No

Notes

Contact Details

Number/Email	Detail
<No data to display>	

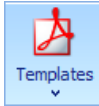
© 2018 Estate Agent Pro Ltd Logged in as Ken/Tonbridge 23 August 2018 12:53

Whilst not always estate agents, management agents are included as estate agents within Estate Agent Pro Enterprise.

New agents can be added by clicking on the  at the right hand side of the agents drop down list.

5.30.4 Particulars Screen

This is where the summary and full details are entered and details concerning the property particulars themselves are recorded. This screen is only accessible from the [Properties Screen](#).




Word Templates use no longer use Microsoft Word and are now much faster to create/generate. Generated property particulars can be stored against the property as PDF's so that they can be easily attached when communicating with new applicants. Stored templates can also be viewed and maintained here. See the [Stored Templates Maintenance Screen](#) for information on maintenance. A new Microsoft Word stored template can be created as follows:

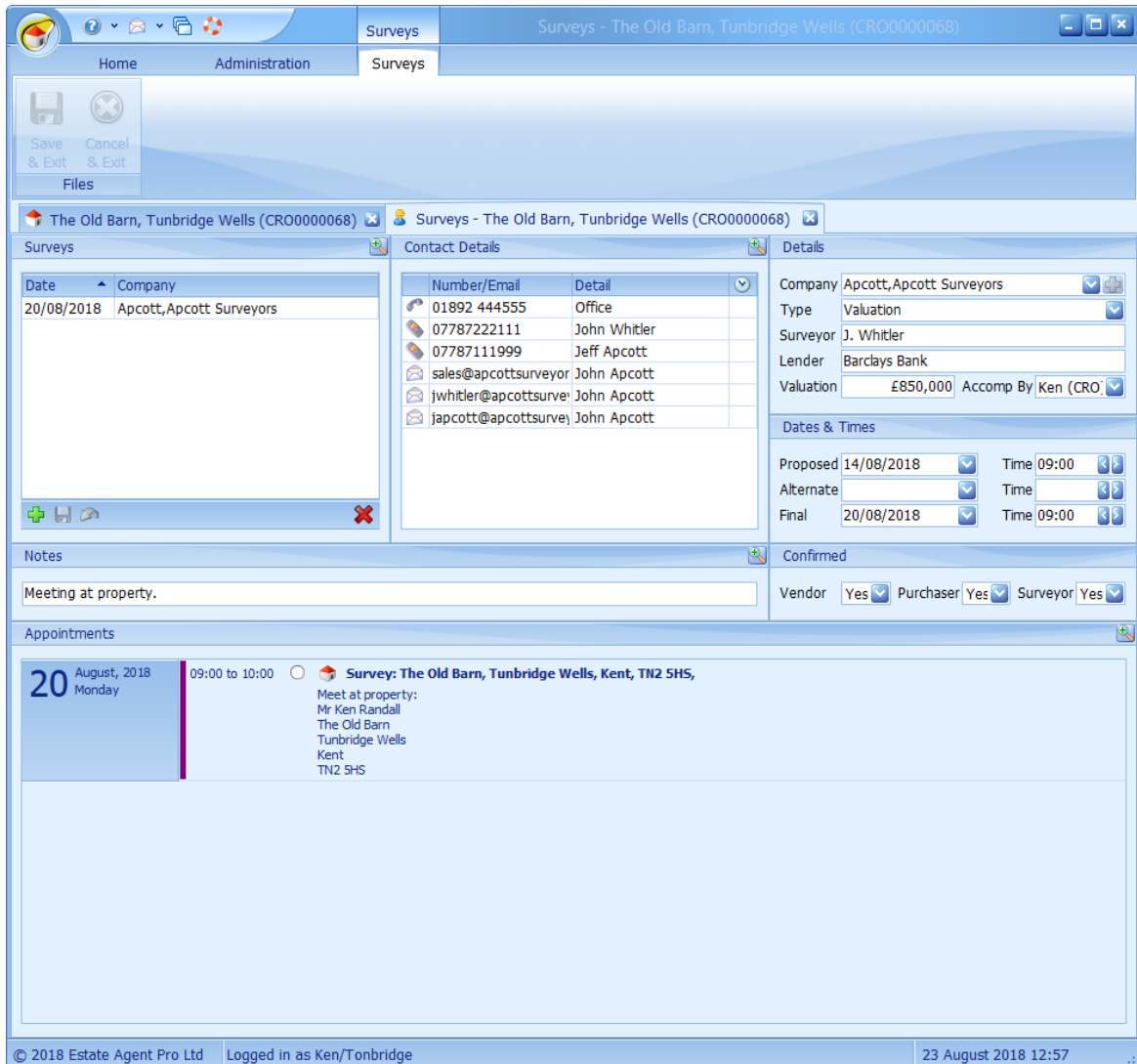
1. Select the property that you want to work with.
2. Click on the **Templates** button.
3. Select **Word Templates** and then select the template that you want to use.
4. Once the template has opened and merged the property data into it, click on **Save & Exit** on the floating toolbar.
5. Give the template to be stored a name, by default it will be given the name of the template that you used, but this can be edited or completely changed.
6. Once the template has been saved, it can now be opened as a PDF file and printed. To open it for printing go to: **Templates>Stored Templates**.



Double clicking on the header with the  in it will detach and enlarge the appropriate details where more word formatting capabilities are available.

5.30.5 Survey Screen

This is where information of all surveys, for whatever reason, of the current property are recorded. The  button can be used to undock (expand) the panel to make it easier to see multiple entries. This screen is only accessible from the [Properties Screen](#).





The screenshot displays the 'Survey Screen' interface. At the top, the window title is 'Surveys - The Old Barn, Tunbridge Wells (CRO0000068)'. The interface includes a top navigation bar with 'Home', 'Administration', and 'Surveys' tabs. A left sidebar contains 'Save & Exit' and 'Cancel & Exit' buttons. The main area is divided into several panels:

- Surveys:** A table with columns 'Date' and 'Company'. It shows one entry: '20/08/2018' by 'Apcott, Apcott Surveyors'.
- Contact Details:** A table with columns 'Number/Email' and 'Detail'. It lists several contacts: '01892 444555' (Office), '07787222111' (John Whitley), '07787111999' (Jeff Apcott), 'sales@apcottsurveyor' (John Apcott), 'jwhitley@apcottsurvey' (John Apcott), and 'japcott@apcottsurvey' (John Apcott).
- Details:** A form for survey information. Fields include 'Company' (Apcott, Apcott Surveyors), 'Type' (Valuation), 'Surveyor' (J. Whitley), 'Lender' (Barclays Bank), 'Valuation' (£850,000), and 'Accomp By' (Ken (CRO)).
- Dates & Times:** Fields for 'Proposed' (14/08/2018, 09:00), 'Alternate' (empty), and 'Final' (20/08/2018, 09:00).
- Notes:** A text area containing 'Meeting at property.'.
- Confirmed:** A form with checkboxes for 'Vendor' (Yes), 'Purchaser' (Yes), and 'Surveyor' (Yes).
- Appointments:** A calendar view for August 20, 2018, showing a survey appointment at 09:00 to 10:00. The appointment details are: 'Survey: The Old Barn, Tunbridge Wells, Kent, TN2 5HS, Meet at property: Mr Ken Randall, The Old Barn, Tunbridge Wells, Kent, TN2 5HS'.

The bottom status bar shows '© 2018 Estate Agent Pro Ltd', 'Logged in as Ken/Tonbridge', and the date/time '23 August 2018 12:57'.

Surveys can be added and deleted by means of the navigator buttons at the bottom left of the list of surveys. See [How do I use the navigation buttons?](#) for further information.

The fields on the right hand side of the survey tab are applicable to each survey.

Details contains relevant information of the company doing the survey and whom for. The valuation (if appropriate) can also be recorded here. The company doing the survey can be selected by means of the  button on the right hand side of the company name. New surveyors can be added by means of the  button next to it (admin access rights apply).

Dates and times are to be recorded here. Proposed and alternate dates and times are optional.

Confirmed is to be used to confirm appointment with necessary parties as appropriate.


If a member of staff is going to be present for the survey they should be selected from the **Accompanied by** drop down list. Existing **Appointments** are shown for the day of the **Final Date**

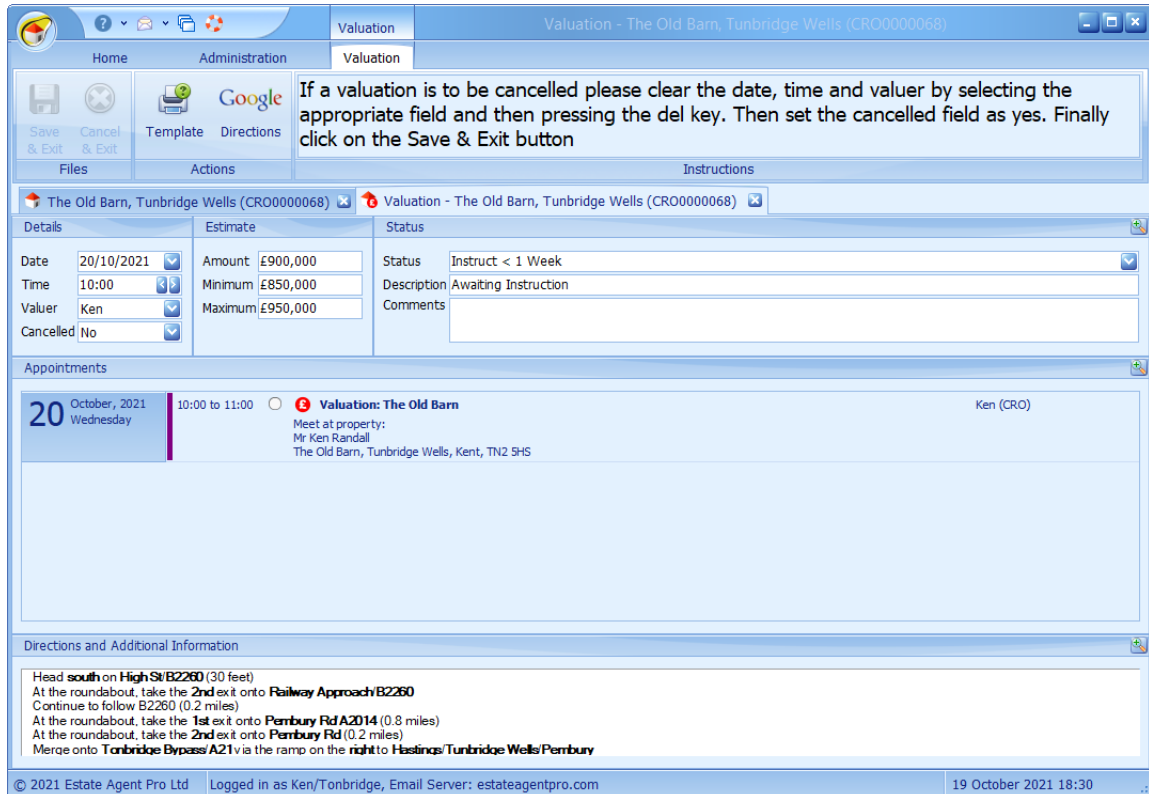
to assist in this selection. Only entries for those users that are set as being accompanies are displayed. If accompanied then the appointment will be automatically added to the diary.

Finally contact details that have been entered for the surveyor are listed below the list of surveys.

See [How do I use the contact details grid?](#) for further information on how to use this grid.

5.30.6 Valuation Screen

Details regarding your valuation of the current property can be recorded here. The  button can be used to undock (expand) the panel to make it easier to see multiple entries. This screen is only accessible from the [Properties Screen](#).





The screenshot shows the 'Valuation' screen for 'The Old Barn, Tunbridge Wells (CRO0000068)'. The interface includes a toolbar with 'Save & Exit' and 'Cancel & Exit' buttons, and a 'Template' button. A message box states: 'If a valuation is to be cancelled please clear the date, time and valuer by selecting the appropriate field and then pressing the del key. Then set the cancelled field as yes. Finally click on the Save & Exit button'. The main form is divided into three sections: 'Details', 'Estimate', and 'Status'. The 'Details' section contains fields for Date (20/10/2021), Time (10:00), Valuer (Ken), and Cancelled (No). The 'Estimate' section contains fields for Amount (£900,000), Minimum (£850,000), and Maximum (£950,000). The 'Status' section contains a Status dropdown (Instruct < 1 Week), a Description dropdown (Awaiting Instruction), and a Comments text area. Below these sections is an 'Appointments' section showing a calendar for October 2021 with an appointment for 10:00 to 11:00 on Wednesday, 20th October, titled 'Valuation: The Old Barn' by Ken (CRO). At the bottom is a 'Directions and Additional Information' section with a text box containing directions to the property. The footer shows '© 2021 Estate Agent Pro Ltd', 'Logged in as Ken/Tonbridge, Email Server: estateagentpro.com', and '19 October 2021 18:30'.



When the date of the valuation is entered/changed the **Appointments** agenda view will change to show appointments already made. Only entries for those users that are set as being valuers are displayed. You can then easily determine who is to do the valuation and an available time slot and enter the information in the **Details** box. You can double click on any appointment shown here to get further information.

Following the valuation the relevant amounts should be recorded in the **Estimate** box. The details in the **Status** box should also be entered. The contents of the Status drop down list are configurable by your system administrator.


The buttons on the toolbar are to be used as follows:

	Prints a valuation template to be filled in by the member of staff carrying out the valuation. Includes directions to the property.
	Retrieves directions from your office to the property from Google Maps which will be included in the Valuation template when the valuer prints it out. There will be a slight delay while this data is retrieved. It is stored in the Directions and Additional Information text box and can then be edited to customise it. These directions can be automatically included in your property particulars.

To cancel a valuation follow the instruction given above. A valuation cannot be cancelled unless the date, time and Valuer are cleared. This is done using the **DEL** key.

 Double clicking on any header panel that contains the zoom  button will undock the panel making it larger for ease of use.

5.30.7 Vendors Tab

This tab contains all fields that are related to the vendor of the current property and itself consists of 7 tabs. The  button can be used to undock (expand) the panel to make it easier to see multiple entries.

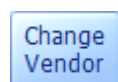
GENERAL TAB

General		Additional Vendors	Docs	Marketing Expenses	Mortgage Required	Notes																
Details				Agency Agreement Received																		
Client Mr Ken Randall 12 Brick Street Westminster London W13 7XR				Type Sole Signed Yes Date 31/08/2010 Weeks Agreed 12																		
Next Review Date 27/11/2021 Review Frequency 1 Month Override Solicitor Young M, YYY Solicitors Ltd, Tor				Commission Rate 1.750% Amount £0.00 Fixed No																		
Contact Details				Property Misdescription's Act Received																		
<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Number\Email</th> <th>Detail</th> </tr> </thead> <tbody> <tr><td>020 7491 7777</td><td>Home</td></tr> <tr><td>01892 525448</td><td>Work</td></tr> <tr><td>07872 123456</td><td></td></tr> <tr><td>knrandall@gmail.com</td><td>Ken Randall</td></tr> <tr><td>01892 565656</td><td>Mrs Randall</td></tr> <tr><td>07877 888888</td><td>Mrs Randall</td></tr> <tr><td>ken@estateagentpro.co.uk</td><td>Mrs Randall</td></tr> </tbody> </table>				Number\Email	Detail	020 7491 7777	Home	01892 525448	Work	07872 123456		knrandall@gmail.com	Ken Randall	01892 565656	Mrs Randall	07877 888888	Mrs Randall	ken@estateagentpro.co.uk	Mrs Randall	Signed Yes Date 31/08/2010		
Number\Email	Detail																					
020 7491 7777	Home																					
01892 525448	Work																					
07872 123456																						
knrandall@gmail.com	Ken Randall																					
01892 565656	Mrs Randall																					
07877 888888	Mrs Randall																					
ken@estateagentpro.co.uk	Mrs Randall																					
				Viewing Arrangements																		
				Any time except Friday's.																		

This is where the primary vendor is defined together with other fundamental information.

Details

To change the clients details click on the button on the right hand side of the client's name and address. This includes the ability to add contact details. See the [Client's Screen](#) for more information.



Use this button if it becomes necessary to change the vendor to another client in the database.

Next Review Date

This is the next date the client is due for review. This can be changed here but please be aware that this is automatically updated when certain actions are taken. A list of these is given in [Frequently Asked Questions](#).

Review Frequency

Changing the review frequency will automatically set the next review date based on today's date.

Review when Archived

The vendor can continue to be reviewed after archiving. This defaults to off.

Override Solicitor

A different solicitor can be set here rather than use the default solicitor set at the client level.

Contact Details

These are the contact details that have been entered for the client and any 2nd vendors entered. It is up to you to enter something in the contact detail field to differentiate them. These can be changed by clicking on the button on the right hand side of the client's name and

address in the Details section. The primary and additional vendors are differentiated by the image displayed in the left hand column. If there are multiple emails, to aid in which one to select, the primary vendor's email will be shown in bold. If he/she has more than one then the one selected as the default will be shown in bold.

See [How do I use the contact details grid?](#) for further information on how to use this grid.

Agency Agreement Received	These details should be updated here when the vendor signs the agency agreement.
Commission	Commission bands can be defined by your system administrator based on the price of the property. If these are used the commission rate is populated automatically. If you wish to override this, mark the commission as fixed and either enter the rate or the amount.
Property Misdescription's Act Received	These details should be updated here when the vendor signs Property Misdescription's Act.
Viewing Arrangements	Enter any specific instructions, they will be displayed when viewings are made.

ADDITIONAL VENDORS TAB

General	Additional Vendors	Docs	Marketing Expenses	Mortgage Required	Notes							
Additional Vendors					Client							
<table border="1"> <thead> <tr> <th>Name & Address</th> </tr> </thead> <tbody> <tr> <td>Randall Elaine, 3 Manor Road, Tunbridge Wells, Kent, TN1 1ST</td> </tr> </tbody> </table>					Name & Address	Randall Elaine, 3 Manor Road, Tunbridge Wells, Kent, TN1 1ST	<table border="1"> <tbody> <tr> <td>Mrs Elaine Randall 3 Manor Road Tunbridge Wells Kent TN1 1ST</td> </tr> </tbody> </table>	Mrs Elaine Randall 3 Manor Road Tunbridge Wells Kent TN1 1ST				
Name & Address												
Randall Elaine, 3 Manor Road, Tunbridge Wells, Kent, TN1 1ST												
Mrs Elaine Randall 3 Manor Road Tunbridge Wells Kent TN1 1ST												
<div> Add using primary vendor's details </div>												
Contact Details					Notes							
<table border="1"> <thead> <tr> <th>Number\Email</th> <th>Detail</th> </tr> </thead> <tbody> <tr> <td>01892 565656</td> <td>Mrs Randall</td> </tr> <tr> <td>07877 888888</td> <td>Mrs Randall</td> </tr> </tbody> </table>					Number\Email	Detail	01892 565656	Mrs Randall	07877 888888	Mrs Randall	<table border="1"> <tbody> <tr> <td>In the process of getting divorced.</td> </tr> </tbody> </table>	In the process of getting divorced.
Number\Email	Detail											
01892 565656	Mrs Randall											
07877 888888	Mrs Randall											
In the process of getting divorced.												

This is where additional vendors can be added. There can be any number of additional vendors.

Additional Vendors

By means of the buttons on the navigation panel at the bottom left of the grid, additional vendors can be added or deleted. See [How do I use the navigation buttons?](#) for more information.

You can add an additional vendor with the same address as the primary vendor using the button.

Contact Details

These are the contact details that have been entered for the client. These can be changed by clicking on the button on the right hand side of the client's name and address.

See [How do I use the contact details grid?](#) for further information on how to use this grid.





Client


To change the clients details click on the button on the right hand side of the client's name and address. This includes the ability to add contact details. See the [Client's Screen](#) for more information.

Notes

Enter any general notes in connection with the current additional vendor.

DOCUMENTS TAB

General	Additional Vendors	Docs	Marketing Expenses	Mortgage Required	Notes
Filename					
 BOS2.doc					
 2013 01.pdf					
<div> </div>					

A copy of any external document can be recorded here, for example, a scan of a letter sent by the vendor or in respect of the vendor. To add a document click on the  button. See [How do I use the navigation buttons?](#) for further help on the navigation bar.

Double clicking the icon will open it using the associated viewer.

MORTGAGE REQUIRED TAB

Property		Advanced		Vendor: Mr Ken Randall	
General		Additional Vendors		Docs	
Marketing Expenses		Mortgage Required		Notes	
Required	Yes <input checked="" type="checkbox"/>	Referred	Yes <input checked="" type="checkbox"/>	Date Referred	16/01/2015 <input type="text"/>
Initials	KW <input checked="" type="checkbox"/>	Spoken to Advisor	No <input checked="" type="checkbox"/>	Auto Referral Sent	24/01/2020 17:15:06
Appointment Date/Time	09/01/2020 10:00:00 <input type="text"/>	Where	Office <input checked="" type="checkbox"/>	Cancelled	Yes <input checked="" type="checkbox"/>
FS Feedback	Await response from advisor				<input checked="" type="checkbox"/>
FS Outcome	Await response from advisor				<input checked="" type="checkbox"/>
Why Cancelled	Signed up elsewhere				<input checked="" type="checkbox"/>
Why not Referred					<input checked="" type="checkbox"/>
Notes	Wants to get a mortgage through us!				

Mortgage referral emails will be automatically sent from the negotiator's email account within a minute or so after all necessary criteria has been entered and saved. If you stat on this property it will be necessary to refresh the record to see the date/time sent!

Details regarding mortgage requirements are to be recorded here.



The following fields are only available if you are using the full version of EAP Enterprise.

FS Feedback	Await Response from Advisor	<input checked="" type="checkbox"/>
FS Outcome	Await Response from Advisor	<input checked="" type="checkbox"/>
Why not Referred		<input checked="" type="checkbox"/>

The above definitions can be set by your system administrator. Default values can be set for FS Feedback and FS Outcome and will be automatically set, as will the Date Referred when an email is automatically sent to your mortgage advisor.

These can additionally be reported on in the [Mortgage Referrals Screen](#).

NOTES TAB

The screenshot displays the 'Notes' tab within the Estate Agent Pro Enterprise application. The tabbed menu at the top includes 'General', 'Additional Vendors', 'Docs', 'Marketing Expenses', 'Mortgage Required', and 'Notes'. The 'Notes' tab is selected, revealing three distinct input areas. The first area, labeled 'Notes', is a large, empty text box. The second area, labeled 'Situation', contains the text 'Moving abroad.'. The third area, labeled 'Warning Note', is another large, empty text box. Each of these three sections is equipped with a vertical scrollbar on its right-hand side.

Notes Any additional notes can be recorded here.

Situation Enter the vendors personal situation here.

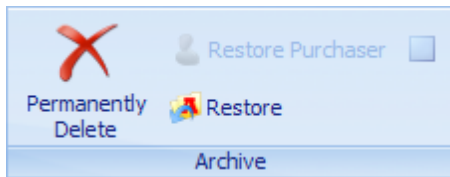
Warning Note Enter any "warning" notes here. This will be automatically displayed every time the property is accessed. See the [Warning Screen](#) for more information.

Information on the other tabs on the properties screen is available here:

[Properties Tab](#)

5.30.8 Archived Properties Screen

The is screen is the same as the [Properties Screen](#) but with the additional toolbar shown below.



The following actions are available:

Permanently Delete	The selected property and all data associated with it will be permanently deleted. This action cannot be undone. Please use with care.
Restore	The selected property and all associated data will be restored to the live database. If the property had a purchaser assigned, the option to also restore the purchaser will be enabled.

5.31 Report Generator Screen

The report generator screen is where you can generate reports on either a subset of applicants or properties filtered easily by yourself. You can also send bulk emails to the subset of applicants or to the vendors of the subset of properties.

The Property Search Tab is shown by default and is initially populated with all non-archived properties.

REPORT GENERATOR SCREEN

The screenshot displays the 'Report Generator' interface. At the top, there's a navigation bar with 'Home', 'Administration', and 'Reports' tabs. The 'Reports' tab is selected, showing a 'Report Generator' window. This window has a top section with various icons and filters: 'Include', 'Filtered Properties', 'Export List', 'Map', 'Match', 'Send', and 'Print List'. Below these are 'Property Search' and 'Property Report Defaults' sections. The 'Property Search' section includes a search bar with the text 'Enter text to search...' and a 'Clear' button. The main area is a table with columns: 'Inc', 'Status', 'Property Address', 'Branch', 'Neg', 'Classification - T Price', 'Recs', 'Beds', and 'Baths'. The table lists 65 properties. On the right side, there's a 'Standard Reports' panel with a list of report types: 'Aging', 'Property List', 'Vendor/Property', 'Comparison - Single Image', 'Comparison - Multi Image', 'Mini Details - Single Image', 'Mini Details - Multi Image', 'New Instructions & Reductions', 'Photograph', 'Summary', 'Thumbnail', 'Address Labels - Vendors', 'Advert - Full Page (12 Properties)', and 'Advert - Full Page (20 Properties)'. Below this is a 'Custom Reports' section and a 'Whole Database Reports' section. The bottom status bar shows '© 2015 Pair Software LLP', '0', and '22 January 2017 10:24'.

Inc	Status	Property Address	Branch	Neg	Classification - T Price	Recs	Beds	Baths
✓	Available	11 Poplar Close, Tonbridge, Kent, TN9 1UP	Tonbridge	KW	Bungalow	£210,000	2	2
✓	Valuation	2 Magdalen Road, Tonbridge, Kent, TN9 1XD	Tonbridge	KC	House	£289,995	1	3
✓	Available	13 Pearl Road, Tonbridge, Kent, TN10 4RL	Tonbridge	KC	House	£249,000	2	3
✓	Available	14 Avenue Gardens, Tonbridge, Kent, TN11 9EE	Tonbridge	RR	House	£324,995	2	4
✓	Sale Agreed	1 Cherry Close, Tonbridge, Kent, TN10 2EF	Tonbridge	KC	Bungalow	£350,000	1	3
✓	Valuation	1 Lonsdale Avenue, Tonbridge, Kent, TN9 1SA	Tonbridge	KC	Bungalow	£245,000	1	2
✓	Sale Agreed	41 Gloucester Avenue, Tunbridge Wells, Kent, TN4	Tonbridge	RR	House	£208,000	2	4
✓	Sale Agreed	40 Northumberland Avenue, Tunbridge Wells, Ken	Tonbridge	RR	House	£219,995	2	3
✓	Sale Agreed	8 Journeys End, Tonbridge, Kent, TN10 4NG	Tonbridge	RR	House	£175,000	3	5
✓	Sale Agreed	14 Ridgeway Road, Tunbridge Wells, Kent, TN4 0Z	Tonbridge	CE	House	£185,000	2	3
✓	Completed (F	25 Green Road, Tonbridge, Kent, TN9 1BP	Tonbridge	AD	Bungalow	£249,995	1	3
✓	Available	5 Musgrove Road, Tonbridge, Kent, TN10 4PH	Tonbridge	KC	House	£189,950	4	6
✓	Available	5 Rutland Gardens, Tonbridge, Kent, TN10 3DG	Tonbridge	KC	House	£325,000	2	4
✓	Withdrawn	12 Green Road, Tonbridge, Kent, TN9 1LZ	Tonbridge	RR	House	£236,995	2	4
✓	Available	18 Northdown Road, Tonbridge, Kent, TN10 3AS	Tonbridge	KC	House	£200,000	1	1
65		65 Properties						

The Property Search Tab can be broken down into 7 separate areas.


PROPERTY LIST


Enter text to search...

Drag a column header here to group by that column

Inc	Status	Property Address	Branch	Neg	Classification - T	Price	Recs	Beds	Baths
<input checked="" type="checkbox"/>	Available	11 Popular Close, Tonbridge, Kent, TN9 1UP	Tonbridge	KW	Bungalow	£210,000	2	2	2
<input checked="" type="checkbox"/>	Valuation	2 Magdalen Road, Tonbridge, Kent, TN9 1XD	Tonbridge	KC	House	£289,995	1	3	1
<input checked="" type="checkbox"/>	Available	13 Pearl Road, Tonbridge, Kent, TN10 4RL	Tonbridge	KC	House	£249,000	2	3	1
<input checked="" type="checkbox"/>	Available	14 Avenue Gardens, Tonbridge, Kent, TN11 9EE	Tonbridge	RR	House	£324,995	2	4	1
<input checked="" type="checkbox"/>	Sale Agreed	1 Cherry Close, Tonbridge, Kent, TN10 2EF	Tonbridge	KC	Bungalow	£350,000	1	3	2
<input checked="" type="checkbox"/>	Valuation	1 Lonsdale Avenue, Tonbridge, Kent, TN9 1SA	Tonbridge	KC	Bungalow	£245,000	1	2	2
<input checked="" type="checkbox"/>	Sale Agreed	41 Gloucester Avenue, Tunbridge Wells, Kent, TN4 0JF	Tonbridge	RR	House	£208,000	2	4	1
<input checked="" type="checkbox"/>	Sale Agreed	40 Northumberland Avenue, Tunbridge Wells, Kent, TN11 9EE	Tonbridge	RR	House	£219,995	2	3	1
<input checked="" type="checkbox"/>	Sale Agreed	8 Journeys End, Tonbridge, Kent, TN10 4NG	Tonbridge	RR	House	£175,000	3	5	2
<input checked="" type="checkbox"/>	Sale Agreed	14 Ridgeway Road, Tunbridge Wells, Kent, TN4 0JF	Tonbridge	CE	House	£185,000	2	3	1
<input checked="" type="checkbox"/>	Completed	25 Green Road, Tonbridge, Kent, TN9 1BP	Tonbridge	AD	Bungalow	£249,995	1	3	1
<input checked="" type="checkbox"/>	Available	5 Musgrove Road, Tonbridge, Kent, TN10 4PH	Tonbridge	KC	House	£189,950	4	6	2
<input checked="" type="checkbox"/>	Available	5 Rutland Gardens, Tonbridge, Kent, TN10 3DG	Tonbridge	KC	House	£325,000	2	4	1
<input checked="" type="checkbox"/>	Withdrawn	12 Green Road, Tonbridge, Kent, TN9 1LZ	Tonbridge	RR	House	£236,995	2	4	1
<input checked="" type="checkbox"/>	Available	18 Northdown Road, Tonbridge, Kent, TN10 3AS	Tonbridge	KC	House	£200,000	1	1	1
65	65 Properties								

Double clicking on any property will open the properties screen focused to the respective property.

The property status is indicated by a coloured block at the left hand side of the grid. Clicking on the information  button on the navigator panel will display a pop up window which shows the meaning of the colours. These colours can be configured by your system administrator.

The primary purpose of this screen is to allow you to generate standard reports on the list of properties shown with the Inc(lude) column ticked. As well as un-ticking this check box, the list can be filtered by clicking on the filter  button on the navigator panel at the bottom left hand side of the panel. See [How do I filter properties?](#) for more information on this.

Columns can be sorted on ascending or descending by clicking the column heading.



This grid has the ability of being grouped by columns. See [How do I use grid column grouping and filtering?](#) for further information.

REPORTS PANEL

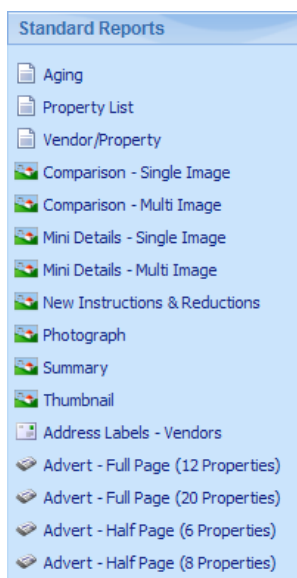
 Standard Reports
 Custom Reports
 Whole Database Reports
 Templates

Standard Reports are displayed by default. Clicking on either of the other buttons will display the list of reports/templates available in that area.

Standard and Whole Database Reports are internal and cannot be changed other than the customisation options available to your system administrator regarding colours used.

STANDARD REPORTS

Individual reports can be generated by clicking on them. The reports will only include those properties listed with a tick in the Inc(lude) column. Reports will be generated in the sort order of the screen. They will initially be opened for viewing and can then be printed if so required. All reports can also be emailed.



Aging details number of days since Instructed or number of days since sale agreed as appropriate, instruction date, age in days and address. Data is also displayed as a pie chart.

Property List details branch, negotiator, type of property, price and basic information on number of rooms.

Vendor/Property details registration date, negotiator, address, vendor, asking & sale prices, sale/rental status and last contact date.

Comparisons details main image or main image plus first 2 additional images, instruction date, asking price, sale agreed date, sale price, advert text and the number of bedrooms and receptions.

Mini Details details main image or main image plus first 2 additional images, asking price or price details, first line of address or advert display address, property reference and advert text.

New Instructions & Reductions shows up to twelve properties per page, detailing: main image, asking price, advert display address and advert text. Please note that it is up to you to filter the property list down to the list of properties that you wish to appear!

Photograph shows the main image of one property per page. There is an option in Admin to superimpose the asking price and full address on the image.

Summary: The first page of the report displays the most expensive property in the selected list beneath a report title set by your system administrator. Subsequent pages display six properties per page, detailing: main image, price or display price, branch and summary details text.

Thumbnail shows up to twelve properties per page detailing: main image, asking price, tenure, number of bedrooms and receptions.

Address Labels: Each page contains up to 21 Names and addresses, suitable for printing on A4 63x38mm 21 per page address labels, such as Avery J8160 or Viking VIJL21.

Adverts details main image, asking price, advert display address, advert text. There is an admin option to record advertisements against individual properties which will also show in the event history when these reports are emailed or printed.

CUSTOM REPORTS

Custom Reports

 Sample Report










Individual reports can be generated by clicking on them. Custom reports are those reports created by yourselves or by us for you (charges apply). These reports can consist of anything that is in the Estate Agent Pro database. In order that the system knows that reports are specific to properties they must be in a sub folder called *Properties*. The reports and folders are defined by your system administrator.

The reports will only include those properties listed with a tick in the Inc(lude) column. Reports will be generated in the sort order of the screen. They will initially be opened for viewing and can then be printed if so required. All reports can also be emailed.

WHOLE DATABASE REPORTS

Individual reports can be generated by clicking on them. These reports have nothing to do with the list of properties displayed. They will initially be opened for viewing and can then be printed if so required. All reports can also be emailed.

Whole Database Reports

 Agency Agreement
 Keys Held (by key)
 Keys Held (by street)
 Mortgage Referral - All Clients
 Sale Boards Location
 Sales Progress
 Solicitors Instructed
 Response Monitoring - Vendors
 Response Monitoring - All Clients

Agency Agreement lists all current (non-archived) vendors giving details of the date that the agreement was received/signed, the property status and address.

Keys Held (by key) lists all current properties giving details of key number, address, number of keys held and if the property has an alarm, the alarm code sorted in key order.

Keys Held (by street) lists all current properties giving details of key number, address, number of keys held and if the property has an alarm, the alarm code sorted in street order.

Mortgage Referral lists all vendors who have been referred to a mortgage Advisor. By default the to/from dates are for the previous rolling month. The report gives details of the date referred, client name and address, negotiators initials, initials of person who made the referral, whether a mortgage is required and if client has spoken to the mortgage advisor. The report also displays the individual clients contact details. See the [Mortgage Referral Report](#) for more information.

Sale Boards Location lists all current (non-archived) properties that have had a board erected, giving details of the board type, date erected, days erected and property address. It also gives the total number of boards erected and breaks this down into sub totals for each board type.





Sales Progress lists all sale agreed properties giving details of the sale date, address, sale price, exchange dates and the date of most recent 'Sales Chasing' activity, sales chasing note or sales chasing item as appropriate.

Solicitors Instructed lists all instructed properties, grouped by Solicitor's company giving details of the solicitor's company and name, client name and address, property address and date instructed. See the [Solicitors Instructed Report](#) for more information.

Response Monitoring produces a dynamic pie chart detailing where your business came from. See the [Response Monitoring Report](#) for more information.

TEMPLATES

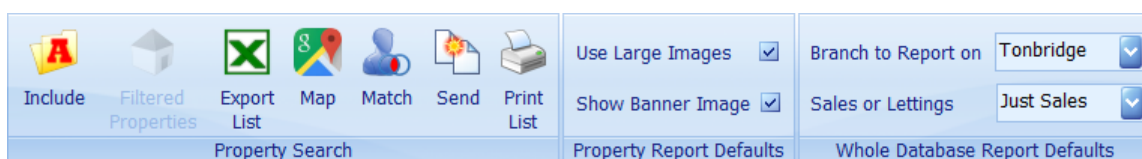
Templates

-  A3 Executive
-  A3 Standard
-  A4 Executive
-  A4 Standard


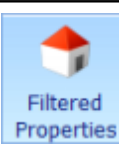
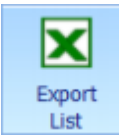

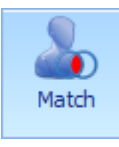


Word templates are supported in Estate Agent Pro and are created by your system administrator. Microsoft Word is no longer used to create or generate these property particulars.

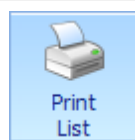
The template for the selected property can be generated by clicking on the appropriate template.

RIBBON BAR



The ribbon bar consists of the following buttons:

	Includes/excludes archived properties from the list.
	This button will only be enabled when a filter is applied to the property list. Clicking this button will open the Properties Screen with a filter applied of just the list of properties. The selected property will have focus.
	Exports the list of properties with the information shown to a CSV file. The default application for viewing this type of file (normally Microsoft Excel) will then be opened.
	Opens the Google Maps interface with the focused property displayed. There is an option to show all other properties. Please refer to the Google Map screen for more information.
	Matches applicants against the current list of Inc(luded) properties that have not matched against it before. Before doing so the Matching Screen is opened where you can specify a combination of options for running the match. These options include only matching your applicants, and applicant statuses. Once the matching is complete the Applicant/Property Matching Screen will be displayed where you can choose to communicate the results of the matching process to the applicants by text, email or letter.  <i>This could take a long time if the list of properties is large!</i>
	Opens the Communications Screen where you can send bulk mailings of predefined letters to the vendors of the Inc(luded) list of properties by either text, email or post. All letters sent are stored for the respective vendor and are available in the Customer Communications Screen .



Prints the property grid exactly as displayed on the screen grey-scaled in landscape mode. This can be previewed first.

Information on the other tabs on the report generator screen is available here:

[Applicant Search Tab](#)

[Report Defaults Tab](#)

5.31.1 Applicant Search Tab

The Applicants Search Tab is where applicants can be filtered and reported on. There is a slight delay when this tab is clicked on as it will initially load all active (non-archived) applicants.

APPLICANT SEARCH TAB

The screenshot displays the 'Applicant Search Tab' interface. At the top, there's a 'Reports' tab with a 'Report Generator' button. Below it, a navigation bar includes 'Home', 'Administration', and 'Reports'. The 'Reports' section has a toolbar with icons for 'Include', 'Filtered Applicants', 'Export List', 'Match', 'Send', and 'Print List'. To the right, there are filters for 'Use Large Images' (checked), 'Show Banner Image' (checked), 'Branch to Report on' (Tonbridge), and 'Sales or Lettings' (Just Sales). Below these are 'Property Report Defaults' and 'Whole Database Report Defaults'. A search bar with 'Enter text to search...' and a 'Clear' button is present. A table of applicants is shown with columns: Inc, Name & Address, Branch, Neg, Reg Date, Max Price, and Status. The table lists 64 applicants. A sidebar on the right shows 'Standard Reports' and 'Custom Reports'.

Inc	Name & Address	Branch	Neg	Reg Date	Max Price	Status
✓	Able J,12 Gordons Road, Tonbridge, Kent, TN9 9QF	Tonbridge	RR	08/04/2010	£180,000	Nothing to Sell
✓	Alen M,47 Waverley Road, Tonbridge, Kent, TN10 4BF	Tonbridge		04/09/2010	£350,000	Nothing to Sell
✓	Allen J,14 Osbourne Road, Tonbridge, Kent, TN9 6YT	Tonbridge		30/08/2010	£250,000	Other Agent
✓	Baggings F,15 Broomfield Drive, Tonbridge, Kent, TN10 4JN	Tonbridge		14/12/2010	£300,000	First Time Buyer
✓	Beval Bob,23 High Street, Tonbridge, Kent, TN9 1XP	Tonbridge	KC	24/03/2015	£400,000	First Time Buyer
✓	Bloggs XX,290b Stratford Road, Sparkhill, Birmingham, Wo	Tonbridge	KC	10/03/2011	£350,000	First Time Buyer
✓	Brightwell F,18 Western Road, Tonbridge, Kent, TN9 5RS	Tonbridge	RR	02/08/2010	£200,000	Investor
✓	Broomfield B,15 Broomfield Drive, Tonbridge, Kent, TN10 4	Tonbridge	KC	24/03/2015	£0	
✓	Brown B,Flat 3, 2 Grove Park, Tonbridge, Kent, TN9 7RT	Tonbridge		06/09/2010	£225,000	Other Agent
✓	Cardogan A,4 Forrest Road, Tunbridge Wells, Kent, TN1 2/	Tonbridge		25/08/2010	£180,000	Sale Agreed
✓	Clevedon X,13 Prince Street, Tonbridge, Kent, TN9 9GB	Tonbridge		14/09/2010	£500,000	Other Agent
✓	Cork K,7 St Marys Close, Tonbridge, Kent, TN10 3AQ	Tonbridge		03/08/2010	£240,000	Other Agent
✓	Crabb S,20 Turner Gardens, Tunbridge Wells, Kent, TN1 1/	Tonbridge		14/07/2010	£150,000	Investor
✓	Deacon K,Flora House, 30 North Road, Tonbridge, Kent, TN	Tonbridge		21/08/2010	£170,000	Nothing to Sell
✓	Dempsey C,14 Deacon Road, Tunbridge Wells, Kent, TN1 1	Tonbridge		08/07/2010	£250,000	Investor

64 64 Applicants

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The Applicant Search Tab can be broken down into 6 separate areas.

APPLICANT LIST


The screenshot displays the 'Applicant List' interface. At the top, there's a search bar with 'Enter text to search...' and a 'Clear' button. Below it, a table of applicants is shown with columns: Inc, Name & Address, Branch, Neg, Reg Date, Max Price, and Status. The table lists 64 applicants. A sidebar on the right shows 'Standard Reports' and 'Custom Reports'.


Inc	Name & Address	Branch	Neg	Reg Date	Max Price	Status
✓	Able J,12 Gordons Road, Tonbridge, Kent, TN9 9QF	Tonbridge	RR	08/04/2010	£180,000	Nothing to Sell
✓	Alen M,47 Waverley Road, Tonbridge, Kent, TN10 4BF	Tonbridge		04/09/2010	£350,000	Nothing to Sell
✓	Allen J,14 Osbourne Road, Tonbridge, Kent, TN9 6YT	Tonbridge		30/08/2010	£250,000	Other Agent
✓	Baggings F,15 Broomfield Drive, Tonbridge, Kent, TN10 4JN	Tonbridge		14/12/2010	£300,000	First Time Buyer
✓	Beval Bob,23 High Street, Tonbridge, Kent, TN9 1XP	Tonbridge	KC	24/03/2015	£400,000	First Time Buyer
✓	Bloggs XX,290b Stratford Road, Sparkhill, Birmingham, Wo	Tonbridge	KC	10/03/2011	£350,000	First Time Buyer
✓	Brightwell F,18 Western Road, Tonbridge, Kent, TN9 5RS	Tonbridge	RR	02/08/2010	£200,000	Investor
✓	Broomfield B,15 Broomfield Drive, Tonbridge, Kent, TN10 4	Tonbridge	KC	24/03/2015	£0	
✓	Brown B,Flat 3, 2 Grove Park, Tonbridge, Kent, TN9 7RT	Tonbridge		06/09/2010	£225,000	Other Agent
✓	Cardogan A,4 Forrest Road, Tunbridge Wells, Kent, TN1 2/	Tonbridge		25/08/2010	£180,000	Sale Agreed
✓	Clevedon X,13 Prince Street, Tonbridge, Kent, TN9 9GB	Tonbridge		14/09/2010	£500,000	Other Agent
✓	Cork K,7 St Marys Close, Tonbridge, Kent, TN10 3AQ	Tonbridge		03/08/2010	£240,000	Other Agent
✓	Crabb S,20 Turner Gardens, Tunbridge Wells, Kent, TN1 1/	Tonbridge		14/07/2010	£150,000	Investor
✓	Deacon K,Flora House, 30 North Road, Tonbridge, Kent, TN	Tonbridge		21/08/2010	£170,000	Nothing to Sell
✓	Dempsey C,14 Deacon Road, Tunbridge Wells, Kent, TN1 1	Tonbridge		08/07/2010	£250,000	Investor

64 64 Applicants

Double clicking on any applicant will open the applicants screen focused to the respective

applicant.

Clicking on the information  button will display a popup window which corresponds with the coloured blocks shown against each applicant. The colour represents the status of the applicant. Both the statuses and colours are configurable by your system administrator.

The primary purpose of this screen is to allow you to generate standard reports on the list of applicants shown with the Inc(lude) column ticked. As well as unticking this checkbox, the list can be filtered by clicking on the filter  button on the navigator panel at the bottom left hand side of the panel. See [How do I filter properties?](#) for an example of this.

Columns can be sorted on ascending or descending by clicking the column heading.

The items shown in the Status column are configurable by your system administrator.



This grid has the ability of being grouped by columns. See [How do I use grid column grouping and filtering?](#) for further information.

REPORTS PANEL

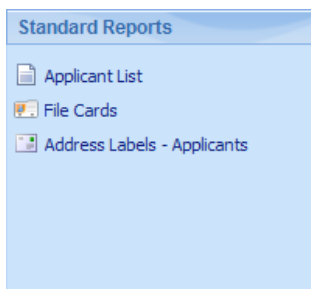


Standard Reports are displayed by default. Clicking on either of the other buttons will display the list of reports available in that area.

Standard and Whole Database Reports are internal and cannot be changed other than the customisation options available to your system administrator regarding colours used.

STANDARD REPORTS

Individual reports can be generated by clicking on them. The reports will only include those applicants listed with a tick in the Inc(lude) column. Reports will be generated in the sort order of the screen. They will initially be opened for viewing and can then be printed if so required. All reports can also be emailed.

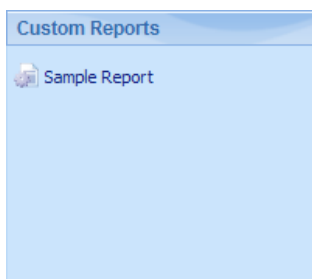


Applicant List details the applicants name & address, branch, negotiator, registration date, maximum price they can afford and their status.

File Cards prints a file card of the applicants details.

Address Labels: Each page contains up to 21 Names and addresses, suitable for printing on A4 63x38mm 21 per page address labels, such as Avery J8160 or Viking VIJL21.

CUSTOM REPORTS

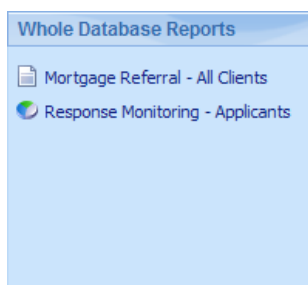


Individual reports can be generated by clicking on them. Custom reports are those reports created by yourselves or by us for you (charges apply). These reports can consist of anything that is in the Estate Agent Pro database. In order that the system knows that reports are specific to applicants they must be in a sub folder called *Applicants*. The reports and folders are defined by your system administrator.

The reports will only include those applicants listed with a tick in the Inc(lude) column. Reports will be generated in the sort order of the screen. They will initially be opened for viewing and can then be printed if so required. All reports can also be emailed.

WHOLE DATABASE REPORTS

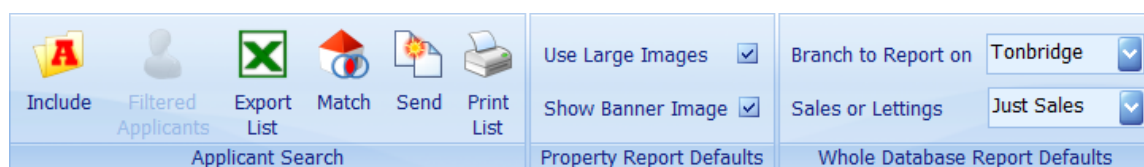
Individual reports can be generated by clicking on them. These reports have nothing to do with the list of applicants displayed. They will initially be opened for viewing and can then be printed if so required. All reports can also be emailed.



Mortgage Referral lists all applicants who have been referred to a mortgage Advisor. By default the to/from dates are for the previous rolling month. The report gives details of the date referred, client name and address, negotiators initials, initials of person who made the referral, whether a mortgage is required and if client has spoken to the mortgage advisor. The report also displays the individual clients contact details. See the [Mortgage Referral Report](#) for more information.




Response Monitoring produces a dynamic pie chart detailing where your business came from. See the [Response Monitoring Report](#) for more information.

RIBBON BAR



The ribbon bar consists of the following buttons:

	Includes/excludes archived applicants from the list.
	This button will only be enabled when a filter is applied to the applicant list. Clicking this button will open the Applicants Screen with a filter applied of just the list of applicants. The selected applicant will have focus.
	Exports the list of applicants with the information shown to a CSV file. The default application for viewing this type of file (normally Microsoft Excel) will then be opened.

 Match	<p>Matches properties against the current list of Inc(luded) applicants that have not matched against it before. Once the matching is complete the Applicant/Property Matching Screen will be displayed where you can choose to communicate the results of the matching process to the applicants by text, email or letter.</p>
 Send	<p>Opens the Communications Screen where you can send bulk mailings of predefined letters to the Inc(luded) list of applicants by either text, email or post. All letters sent are saved for the respective applicant and can be viewed in the Customer Communications Screen.</p>
 Print List	<p>Prints the applicant grid exactly as displayed on the screen grey-scaled in landscape mode. This can be previewed first.</p>

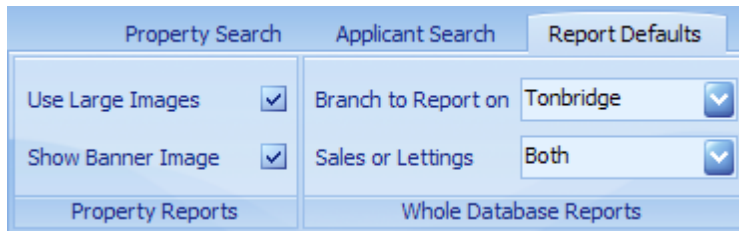
Information on the other tabs on the report generator screen is available here:

[Properties Search Tab](#)

[Report Defaults Tab](#)

5.31.2 Report Defaults Tab

Report Generator defaults can be changed here. They are stored in the registry.



Property Search	Applicant Search	Report Defaults
Use Large Images <input checked="" type="checkbox"/>	Branch to Report on	Tonbridge
Show Banner Image <input checked="" type="checkbox"/>	Sales or Lettings	Both
Property Reports	Whole Database Reports	

Use Large Images If checked reports with images in them will be slower to generate.

Show Banner Image Include your banner image in reports if defined.

Branch to Report on Which branch to report on.

Sales or Letting's Sales, letting or both.

Information on the other tabs on the report generator screen is available here:

[Properties Search Tab](#)

[Applicant Search Tab](#)

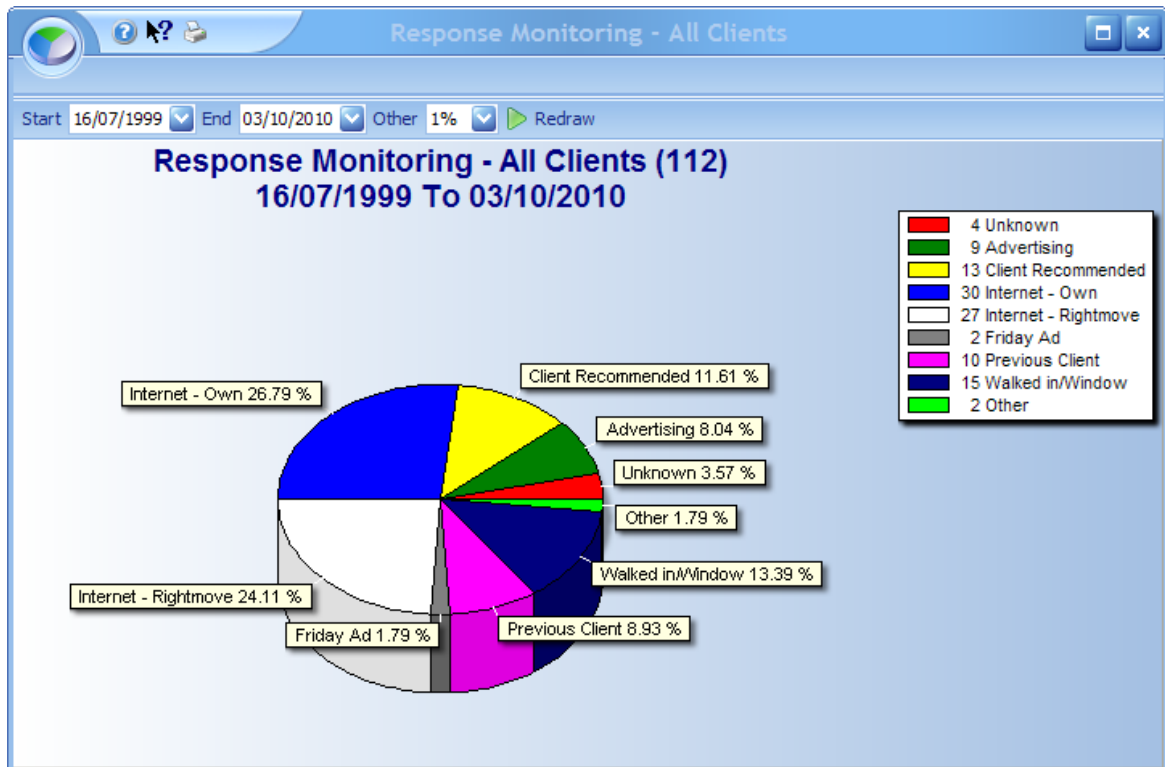
5.31.3 Report Screens

Some of the reports are in fact screens. These are detailed below:


[Mortgage Referral Report](#)
[Response Monitoring Report](#)
[Solicitors Instructed Report](#)

5.31.3.1 Response Monitoring Report

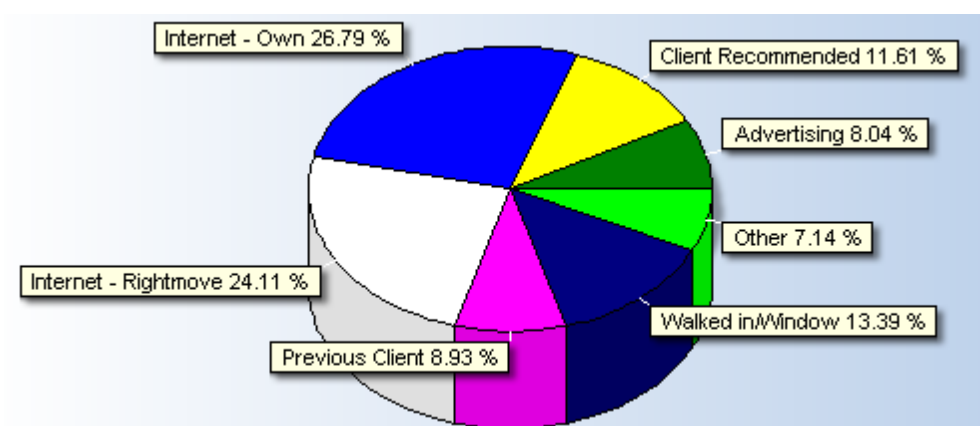
This is a dynamic pie chart detailing where your business came from.




The response monitoring screen displays all registered applicants and/or vendors between the date range specified and is generated from the [Report Generator Screen](#). The response monitoring statuses are definable by your system administrator.

The start default date is the earliest registration date of your clients and the end date is today. If you change the dates, click on the  button to redraw the graph.

The percentage in the **other** drop down menu can be used to group smaller values together. Changing this percentage will automatically redraw the graph. For example, if this was set to 5% the Unknown 3.57%, and Friday Ad 1.79% would be grouped in with the existing Unknown 3.57 % resulting in the Other group now totalling 7.14%.



The other percentage can be set between 0 and 10%. The pie chart can be printed by clicking on the  button.


5.31.3.2 Solicitors Instructed Report

Lists all properties where either the applicant purchasing, or the vendor's solicitors have been instructed.

Date Instructed	Applicant/Vendor	Property	Solicitor
Company : Badger & Partners			
	Castillo A, 8 Journeys End, Tonbridge, Kent, TN10 4NG	2 Waltham Close, Cliftonville, Kent, CT9 3YF	Badger J
1 Instructions			
Company : Mercantile & Rolfe			
31/08/2010	Able J, 12 Gordons Road, Tonbridge, Kent, TN9 9QF	8 Journeys End, Tonbridge, Kent, TN10 4NG	Mercantile K
	Able J, 12 Gordons Road, Tonbridge, Kent, TN9 9QF	New House, Lamberhurst Vineyard, Lamberhurst, Kent, TN5 6QS	Mercantile K
2 Instructions			
3 Instructions			

This report is automatically grouped by solicitor's company giving details of the solicitor's company and name, client name and address, property address and date instructed.

The grid can be printed exactly as it is displayed on the screen by clicking on the  button.

 This grid has the ability of being grouped and filtered by columns. See [How do I use grid column grouping and filtering?](#) for further information.

5.32 Sales/Rent Status Screen

Displays either the Sales or Rental Status Screen for the current property where the property's status can be changed and details relating to the sale can be recorded. The example shown is for a sale. The Status of a property is changed here.

SALES STATUS SCREEN - INFORMATION TAB

The Old Barn, Tunbridge Wells (CRO0000068)

Sales Status - The Old Barn, Tunbridge Wells (CRO0000068)

Information

Sales Chasing

Central Notes

Purchaser

Status

Vendor (if also an applicant)

Status Investor

Details

Price - Asking

£1,400,000

Price - Agreed

Property Status

Available

Tax Band

H

Tenure

Freehold

Vendor Dates

Registration

01/01/2018

Instruction

09/01/2017

Withdrawn

Property Dates

Agreed

Fall Through

30/07/2020

Dependent on Survey

No

Solicitor Instructed

Exchange (Provisional)

Exchange (Actual)

Completion (Provisional)

Completion (Actual)

Invoice

Invoice No

Own Reference No

Paid

Sales Negotiator

Negotiator

AD

Special Conditions

Fixtures and Fittings

Info Notes

Complete the areas of the screen as follows:

Purchaser Select the purchaser by clicking on the button.

Purchaser Status The status of the purchaser. These statuses are configurable by your system administrator. The status can be changed here.

Vendor Status	The status of the vendor if he is also an applicant. These statuses are configurable by your system administrator. The status can be changed here .
----------------------	---

Details Enter the new Asking Price, Agreed Price and Property Status as applicable. When the property status had previously been set to sale agreed, the property status cannot be set to any status less than sale agreed without setting the fall-through date first.

Council tax band and tenure are a legal requirement. When the property status is changed to one that would be uploadable, they are checked and an error displayed if they are not entered.

Vendor Dates Dates connected with the vendor are entered here.

Property Dates Dates, and other details connected with the property are entered here.

Invoice If you wish to use your own references these can be entered here and also the date when your invoice was paid.

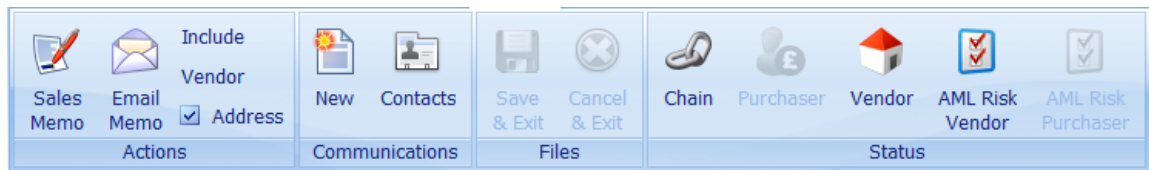
Special These will appear on the Memorandum of Sale.

Fixtures and These will appear on the Memorandum of Sale.



Info Notes Any other relevant notes can be recorded here.

RIBBON BAR

The following buttons are available on the ribbon bar:



	Generates a Memorandum of Sale which can be printed. If a property has additional vendors, a separate Memorandum of Sale will be generated for each one.
	Emails the Memorandum of Sale to selectable addressees using the Email Screen . When sent this document is automatically saved and is accessible by clicking on the Draft & Sent Letters button on the Properties Screen . This button will be disabled if the vendor does not have a solicitor or the vendor's solicitor does not have an email address. This button will be disabled if the vendor does not have a solicitor or the vendor's solicitor does not have an email address. If standard letters have been defined with the word memorandum in the description these letters will be used and will be merged as normal. If not, some default text will be entered, which can be changed when sending.
	Opens the Communications Screen where you can send predefined vendor sales memorandum letters to the vendor and/or any additional vendors of the selected offer by either text, email or post. Please note that only vendor letters that contain the word memorandum will be displayed.
	Displays a list of all contact details for this client including those of the purchaser (if applicable) and his solicitor if relevant. There are also tabs on the screen for sales chasing, central notes and chain flow. See the Contacts Screen for more information.
	Validates entries made and if information entered is correct, saves the changes and closes this screen,
	Closes this screen discarding any changes made.
	The up and down chains can be recorded here for properties under offer and sale agreed. The current property and the purchaser are automatically added. See the Chain Flow Screen for more information.
	Opens the purchaser's client details. This includes the ability to add contact details. See the Client's Screen for more information.

 Vendor	<p>Opens the vendor's client details. This includes the ability to add contact details.</p> <p>See the Client's Screen for more information.</p>
 AML Risk Score	<p>Opens the Advanced Money Laundering (AML) screen which enables you to select the underlying elements on which it basis the score. There is one of these for both the vendor and the applicant.</p> <p>See the Advanced Money Laundering (AML) Screen for more information.</p>

Information on the other tabs on the Sales/Rent Status Screen is available here:

[Sales Chasing Tab](#)

[Central Notes Tab](#)

5.32.1 Sales Chasing Tab

This is used to record relevant key dates as the solicitor progresses the sale.


Key Dates		
Description	Vendor	Applicant
Paid Searches to Solicitor	08/09/2015	09/09/2015
Solicitor Applied for Deeds		16/09/2015
Filled in Mtg Forms	23/09/2015	22/09/2015
Paid Survey Fee	17/09/2015	16/09/2015
Filled in Fixtures Forms	23/09/2015	
Solicitor Sent out Contract	01/10/2015	
Received Sellers Contract		
Local Searches Applied for		
Employee Ref Received		
Credit Ref Done		
Local Searches in		
Survey Done		
Received Mtg Offer		
Booked for Signing		
Buyer Aware Deposit Rules		
Signed Contract		

Dated Notes		
Date	Notes	Init
01/10/2015 09:50	Chased vendors solicitor re sending out contracts	KC

The items listed here are configurable by your system administrator.

Any date can be set to N/A if required by right mouse clicking on the respective input field and selecting 'Set as N/A' from the drop down menu,

Date notes relating to sales chasing can also be entered here. See [How do I use the navigation buttons?](#) for further help on the navigation bar.

The  button can be used to enter the note into the diary on the date entered.

[Information Tab](#)

[Central Notes Tab](#)

5.32.2 Central Notes Tab

The Old Barn, Tunbridge Wells (CRO0000068)

Sales Status - The Old Barn, Tunbridge Wells (CRO0000068)

Information

Sales Chasing

Central Notes

Print

Date	Amended	Whom	Branch	Init	Notes	Method
09/11/2019 10:14	11/11/2019 10:16:18	Purchaser	CRO	KC	Spoke to Mr Williams	Spoken
05/11/2019 10:14	11/11/2019 10:16:28	Purch Solicitor	CRO	KC	Spoke to Cratchet & Cratchet	Spoken
01/11/2019 10:16	11/11/2019 10:17:37	General	CRO	KC	Phoned Estate agent	Spoken
26/03/2018 14:40	10/11/2019 13:07:47	Vendor	CRO	KC	Mr & Mrs Randall are on holiday.	Spoken
16/05/2012 06:43	10/11/2019 13:07:56	Vend Solicitor	CRO	KC	Note to all branches. Contact solicitor not Mr or Mrs Randall	Spoken

This is where central notes in connection with the sale can be recorded. The rows have the background colour set based on the Whom column setting. These options and the colour can be configured in Admin>Options>General>Central Notes Whom.

Date related notes can be entered here. See [How do I use the navigation buttons?](#) for further help on the navigation bar.

Reason and Method can be configured by your EAT System Administrator and by default are not mandatory.

Information on the other tabs on the properties screen is available here:

[Information Tab](#)

[Sales Chasing Tab](#)

5.33 Solicitor Referrals Screen

This screen lists all clients and displays the associated properties/applicants who have been referred to solicitors and is only available in the full version of EAP Enterprise.

Solicitor Referrals Report

Drag a column header here to group by that column

Referred	By	Branch	Property/Applicant	Solicitor
31/05/2018	KC	CRO	11 Brick Street, Westminster, London, W13 7XR	Badger J,Badger & Partners,8 Holtye Road, Tunbridge Wells, Kent, TN2 6AJ
31/05/2018	KC	CRO	15 Brick Street, Westminster, London, W13 7XR	Badger J,Badger & Partners,8 Holtye Road, Tunbridge Wells, Kent, TN2 6AJ
31/05/2018	KC	CRO	Randall Ken,12 Brick Street, Westminster, London, W13 7XR	Badger J,Badger & Partners,8 Holtye Road, Tunbridge Wells, Kent, TN2 6AJ
31/05/2018	KC	CRO	The Old Barn, Tunbridge Wells, Kent, TN2 5HS	Badger J,Badger & Partners,8 Holtye Road, Tunbridge Wells, Kent, TN2 6AJ

© 2018 Pair Software LLP Logged in as Ken/Tonbridge 02 June 2018 12:26

By default the start/end dates are for the previous rolling month. Changing the start or end dates will automatically refresh the report.

The grid can be printed or emailed exactly as it is displayed on the screen by clicking on the Print Grid or Email Grid button respectively.

The selected applicant or vendor (property) screen can be displayed by clicking on the view applicant or view property buttons.

This grid has the ability of being grouped and filtered by columns. See [How do I use grid column grouping and filtering?](#) for further information

5.34 Support Screen

The support screen is where you can quickly and easily contact Estate Agent Pro technical support with any questions or problems you may be experiencing. This is the quickest and preferred method of communicating with technical support as it records the information directly into our support database.

Technical Support

From: ken@tonbridgeestateagents.com

Company: Tonbridge Estate Agents

Branch: Tonbridge

Your Name: Ken Jones

Severity: Questions, enhancements or minor issues

Software: Property Portals

Module: Uploads

Property: The Old Barn, Tunbridge Wells, Kent, TN4 0HY (if relevant)

Description: This property is appearing on our website but is not on Rightmove!

Submit

Complete the form with as much information as possible and click on the Submit button. If you do not have internet access then this means of communication with us will not work!



The more information we are given, the more quickly we will be able to resolve your issue. Please note that support calls with 'Call me' or similar entered into the description box will be dealt with at the lowest priority.

5.35 Valuation Report Screen

The valuation report screen lists all properties with a status of 'valuation' so that you can easily monitor those vendors/properties that have not progressed beyond that stage.



Date	Time	Branch	Valuer	Property	Vendor	Valuation	Ask Price	Description	Status	Canc
23/08/2007	10:00	Keymer Road		120 Grand Avenue, Hassocks, West Sussex, BN6 8DG	Flander N	£340,000	£0			No
20/06/2008	15:00	Keymer Road		1 Sweetlands, Keymer, Hassocks, West Sussex, BN6 8LZ	Gilbert Elaine		£285,000			No
15/02/2010	12:30	Keymer Road		4 Bonnywood Road, Hassock, West Sussex, BN6 8HR	Smith Ian	£375,000	£0	Probate		No
14/05/2010	10:45	Keymer Road		1 Pine Trees Court, Hassocks, West Sussex, BN6 8NW	Hackett E	£180,000	£0			No
18/08/2010	14:30	Keymer Road	Moz	17 Clon Millward Road, Tonbridge, Kent, TN9 1TR	Millward M		£192,000			No
31/08/2010	12:00	Tonbridge	Moz	2 Magdalen Road, Tonbridge, Kent, TN9 1XD	Guildford A	£285,000	£289,995	3 Bed EOT	Other (See Notes)	No
03/09/2010	15:00	Tonbridge	Rob	1 The Spiral, Tonbridge, Kent, TN11 9DG	Spiral L	£185,000	£185,000	3 Bed Semi	Undecided	No
03/09/2010	15:00	Keymer Road	Rob	2 The Spiral, Tonbridge, Kent, TN11 9DG	Spiral L	£185,000	£185,000	3 Bed Semi	Undecided	No
04/09/2010	14:00	Tonbridge	Moz	1 Lonsdale Avenue, Tonbridge, Kent, TN9 1SA	Lonsdale F	£245,000	£245,000	2 Bed Bungalow	Undecided	No
06/09/2010	10:00	Keymer Road	Moz	1A Cherry Close, Tonbridge, Kent, TN10 2EF	Cherry V	£335,000	£350,000	3 Bed Bungalow	Instruct < 1 Week	No
05/07/2014	17:00	Keymer Road		4 Brambles, Hassocks, West Sussex, BN6 8SF	Hair Jonathon	£250,000	£0			No
20/12/2014	10:00	Keymer Road		1 Church Cottage, The Wyshe, Pyecombe, West Sussex, IP27 9EJ	Corbett A.D.		£0			No
20/12/2014	14:00	Keymer Road		1 Fox Close, Clayton Mills, Hassocks, BN6 8YG	Sparkes F	£500,000	£0			No
				24 Properties						

Double clicking on an individual property will open the properties screen focused on the respective property.

Columns can be sorted on ascending or descending by clicking the column heading.

The items shown in the Description and Status columns are configurable by your system administrator.

The Print Preview button prints the grid exactly as it is displayed on the screen in greyscale with an option to preview it first.



This grid has the ability of being grouped and filtered by columns. See [How do I use grid column grouping and filtering?](#) for further information

5.36 Viewing Book Screen

The viewing book screen lists all viewings made (read only) on all properties within a specified date range (default 30 days). Double clicking on an individual property in the property column will open the properties screen focused to the respective property and likewise for the applicant.

The screenshot displays the 'Viewing Book' screen in the Estate Agent Pro Enterprise software. The top navigation bar includes 'Home', 'Administration', and 'Viewings'. The main area features a table of viewings with the following data:


Entered	Made By	Viewing	Property	Applicant	App Status	Mtg Reqd	Branch	Neg	V Conf	A Conf	V Inf	Canc
20/01/2015	Ken	22/01/2015	15 Northdown Road, Tunbridge W	Bloggs XX Mrs	First Time Buye	<input checked="" type="checkbox"/>	Tonbridge	KC	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
20/01/2015	Ken	21/01/2015	19 Cardogan Close, Tunbridge W	Allen J Mr & Mrs	Other Agent	<input checked="" type="checkbox"/>	Tonbridge	RR	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
23/01/2015	Ken	23/01/2015	66 Trenton Road, Alton, Hampshir	Clevedon X Mr	Other Agent	<input checked="" type="checkbox"/>	Tonbridge	RR	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
29/04/2015	Ken	21/10/2015	The Old Barn, Tunbridge Wells, K	Van Den Elzen Maria	Cash Buyer	<input type="checkbox"/>	Tonbridge	KC	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
13/08/2015	Ken	14/08/2015	1 The Spiral, Tonbridge, Kent, TN	Brightwell F Mrs	Investor	<input checked="" type="checkbox"/>	Tonbridge	KW	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
07/02/2016	Ken	08/02/2016	66 Trenton Road, Alton, Hampshir	Able J Mr	Nothing to Sell	<input checked="" type="checkbox"/>	Tonbridge	RR	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Below the table, there are three sections: 'Contact Details' (listing primary contacts for each viewing), 'Viewing Comments' (a text area for notes), and 'Viewing Arrangements' (a text area for specific viewing instructions). The bottom status bar shows '© 2015 Pair Software LLP', '0', and '28 June 2016 13:27'.

For details of the data included see the [Viewings Screen](#) for further information.

Columns can be sorted on ascending or descending by clicking the column heading.

Double clicking on an individual property or applicant will open the [Properties Screen](#) or the [Applicants Screen](#) focused to the respective property/applicant.

 This grid has the ability of being grouped by columns. See [How do I use grid column grouping and filtering?](#) for further information.

5.37 Viewings Screen

Viewings can be added or amended by using the Viewing Screen which is accessible from either the Applicants or Properties screens.

VIEWINGS SCREEN

The screenshot displays the 'Viewings (14)' screen. The top ribbon includes tabs for Home, Administration, and Viewings. The Viewings tab is active, showing a list of viewings. The list has columns: Date, Time, Made By, Applicant, App Status, Branch, Neg, Property, Meet, Accom, Accom By, Status, and checkboxes for V, Conf, A, Conf, V, Inf, and C. The list shows 14 viewings with various dates and statuses. Below the list, there are sections for Appointments, Contact Details, and Viewing Comments. The Appointments section shows a calendar view for Saturday, 03 October 2020, with three appointments: 09:15 to 10:15, 10:00 to 11:00, and 12:00 to 13:00. The Contact Details section shows a list of contacts with columns for Whom, Number/Email, and Detail. The Viewing Comments section shows a text area for comments.

The example given above is of a properties bug viewings which lists all applicants that viewed The Old Barn. If it was generated from the applicants screen it would contain all properties that the applicant had viewed.

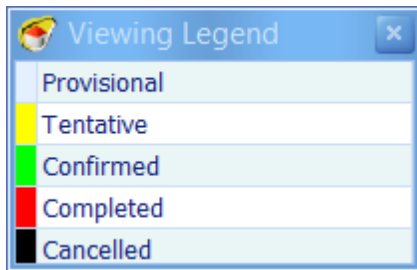
Clicking on any viewing will display the respective data for that viewing.


Clicking on the button will open the [Offers Screen](#) adding an offer from the applicable applicant for the selected property.

The report can be viewed without applicant and/or vendor contact details and without comments if so required by un-ticking the check boxes on the ribbon bar. You may wish to do this if, for example, to send a report of all viewings to a vendor who has withdrawn his property.

Double clicking on an individual property or applicant will open the [Properties Screen](#) or the [Applicants Screen](#) screen focused to the respective property/applicant.

The colour coding against each viewing indicates the status of the viewing. Clicking on the information button will display the meaning of the colour coding used.



 This grid has the ability of being grouped by columns. See [How do I use grid column grouping and filtering?](#) for further information.

This screen can be broken down into 3 main areas.


VIEWINGS GRID


Drag a column header here to group by that column

Date	Time	Made By	Applicant	App Status	Branch	Neg	Property	Meet	Accomp	Accomp By	Status	V Conf	A Conf	V Inf	Canc
Mon 16/01/2017	13:00	Ken	Mrs Maria Van	Cash Buyer	Tonbridge	KC	The Old Barn, Tunbridge W	At Propert	<input checked="" type="checkbox"/>	Ken (MAR)	Provisional	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sun 15/01/2017	13:00	Ken	Mr J Able	Nothing to S	Tonbridge	RR	66 Trenton Road, Alton, H		<input checked="" type="checkbox"/>	Ken (CRO)	Provisional	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

☒ (Viewing Status in (Provisional,Tentative,Confirmed)) and (Sale/Rent = Sale)

The V.Inf (vendor informed of feedback from the viewing) cannot be ticked if the date/time of the viewing has not passed. If it is ticked, when the viewing is saved a note to this effect will be automatically added for the vendor's dated notes.

This displays details of all existing viewings and allows you to add a new viewing by clicking on the  button. See [How do I use the navigation buttons?](#) for further help on the navigation bar.

Filters can be applied to certain columns by clicking on the  button.

Certain columns can be dragged to the group area as indicated.

A column can be added for the recording of the negotiator who made the booking. This can be turned on in Administration>Options>General>Options.

Viewing Status 

Date	Time	Made By	Applicant	App Status	Branch	Neg	Property	Meet	Accomp	Accomp By	Status	V Conf	A Conf	V Inf	Canc
Viewing Status : Provisional															
Mon 16/01/2017	13:00	Ken	Mrs Maria Van Den	Cash Buyer	Tonbridge	KC	The Old Barn, Tunbridge W	At Propert	<input checked="" type="checkbox"/>	Ken (MAR)		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sun 15/01/2017	13:00	Ken	Mr J Able	Nothing to S	Tonbridge	RR	66 Trenton Road, Alton, Ha		<input checked="" type="checkbox"/>	Ken (CRO)		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Fri 23/01/2015	12:00	Ken	Mr X Clevedon	Other Agent	Tonbridge	RR	66 Trenton Road, Alton, Ha		<input type="checkbox"/>			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Thu 22/01/2015	12:00	Ken	Mrs XX Bloggs	First Time Bu	Tonbridge	KC	15 Northdown Road, Tunbri		<input type="checkbox"/>			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Mon 20/02/2006	13:00		Mr J Dempsey	Investor	Tonbridge	KC	Flat 8 Golden Court, Grove C		<input type="checkbox"/>			<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Viewing Status : Tentative															
Viewing Status : Confirmed															

☒ (Viewing Status in (Provisional,Tentative,Confirmed)) and (Sale/Rent = Sale)

The following columns have specific usage which is detailed below:






- Meet** Choose where to meet from the drop down list. Only applicable to an accompanied viewing.
- Accomp** The viewing is to be accompanied by a member of staff.
- Accomp By** Member of staff accompanying the viewing.
- Status** Whether the viewing is open or closed. A closed viewing is defined as confirmed with the vendor and confirmed with the applicant and viewing has taken place and the vendor has been given the feedback. If it has been cancelled it is also deemed as being closed. The green block on the left gives visual feedback that it is open whereas red signifies that it is closed.
- V Conf** Means that the viewing has been confirmed by the vendor.
- A Conf** Means that the viewing has been confirmed by the applicant.
- V Inf** Means that the feedback given by the applicant after the viewing has been fed back to the vendor.
- Canc** Viewing was cancelled

DIARY - DAY OF VIEWING


Saturday, 03 October			2020
09:15 to 10:15		Valuation: 1 Lonsdale ...	Clive
Meet at property: Miss G Lonsdale 1 Lonsdale Avenue, Tonbridge, Kent, RM16 6NH			
10:00 to 11:00		Miss K Deacon @ The Ol...	Ken
See viewing for details Miss K Deacon The Old Barn, Tunbridge Wells, Kent, TN2 5HS			
12:00 to 13:00		Mrs G Van Den Elzen @ ...	Ken
See viewing for details Mrs Maria Van Den Elzen			


To assist in scheduling accompanied viewings, the diary for the day of the viewing is displayed here. Only entries for those users that are set as being accompanees are displayed.

VIEWING DETAILS

Contact Details				Viewing Comments	Viewing Arrangements
Whom	Number/Email	Detail			
 Applicant: Mr & Mrs J Able	acastillo@google.com			Liked the property and that it had a bathroom down stairs. Just concerned about the location. Would like to 2nd viewing of the property but will be late next week.	Requested accompanied viewings if Mrs Castillo is alone at home.
 Applicant: Mr & Mrs J Able	01892 444444	Home			
 Applicant: Mr & Mrs J Able	07777111111				
 Applicant: Mr & Mrs J Able	jable@hotmail.com				
 Applicant: Mr & Mrs J Able	01892779674	Work			

These are the contact details that have been entered for the applicant and the vendor of the focused property.

Clicking on the  button will open the [SMS Text Messaging Screen](#) enabling you to send text messages to whoever is detailed in the *Whom* column. This has to be configured and additional charges apply.

Clicking on the  button will open the [Email Screen](#) enabling you to send an email.








Both of these types of communication will be stored under Draft & Sent Communications of the applicant or vendor respectively. See the [Customer Communications Screen](#) for more information.

These are the viewing comments made by the applicant after each viewing and should be fed back to the vendor.





These are the viewing arrangements entered on the [Properties Screen Vendors Tab](#)

RIBBON BAR

The following buttons are available on the ribbon bar.

 New Offer	Open the Offers Screen adding an offer from the applicable applicant for the selected property.
 View	Opens the Properties Screen focused to the selected property.
 View	Opens the Applicants Screen focused to the selected applicant.
 New	There are two of these buttons, one for applicants and one for vendors. Clicking either opens the Communications Screen where you can send predefined viewings letters to the currently selected applicant or vendor (and/or additional applicants/vendors if defined) by either text, email or post. All letters sent are saved and are accessible by clicking on the Draft & Sent Letters button.  Please note that only applicant/vendor letters that start with the word Viewing will be displayed.
 Draft & Sent	There are two of these buttons, one for applicants and one for vendors. Clicking either provides details of all communications previously sent to the current applicant or vendor. Communications can be resent from this screen. See the Customer Communications Screen for more information.
 View	Opens a print preview of all viewings. Comments and contact details can be included/excluded by means of the associated check boxes.

When automated emailing of Viewing appointments/reminders is enabled, an additional section is shown on the ribbon bar.

	 App	 Vend	Client Record
Confirm	13/10/21 20:14	13/10/21 20:14	 Applicant
Remind	14/10/21 00:00	14/10/21 00:00	 Vendor
Automated Emails			

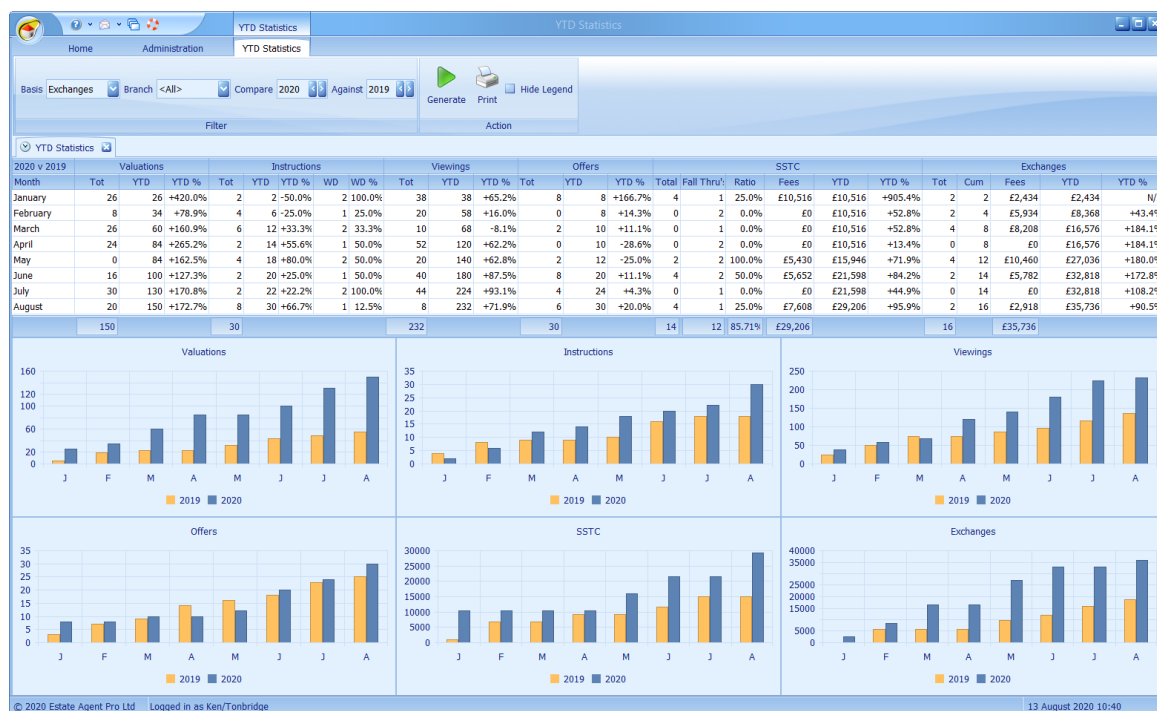
This shows the date/time that the email was sent. It also allows direct access to the [Client's Screen](#), where there is an option to override the automatic sending of these emails if so required. Situations where you might wish to disable this are, for example, if the vendor is a builder or the property is empty and you always attend the viewings, etc.

There is also an additional section on the the screen which shows the error.

Vend: Email is blank

5.38 YTD Statistics Screen

Displays year to date statistics for the current year versus the previous year by default.



This is broken down by month giving details of the number of valuations, instructions, viewings, offers, sales and exchanges or completions for the year selected.

The **Compare** year and the **Against** year can be changed by clicking on the buttons on the right of the year.

The display defaults to the value of exchanges. This can be changed by means of the drop down box to be completions.

By default values are displayed for all branches. A specific branch can be selected instead using the **Branch** drop-down box.

After making any changes to the default settings the values can be recalculated by clicking on the **Generate** button.

The grid and/or graphs can be printed by clicking on the button.

The Legend in the graphs can be hidden by checking the **Hide Legend** check-box.

Most columns are self explanatory. Those that may not be clear are detailed below:

SSTC	This represents all properties who's sale was agreed in the month. The Ratio is the fall through ratio. Fees represents the fee you will earn if the sale goes to completion.
Exchanges	This represents all properties that exchanged in the month. Cum shows the cumulative exchanges and YTD Fees is the cumulative year to date fees you will receive when the sale completes.
YTD %	These columns represent the YTD values as a percentage increase/decrease of the comparative years equivalent value

ESTATE AGENT PRO

Part



VI

Ancillary Screens

6 Ancillary Screens

These screens are used from more than one screen in Estate Agent Pro.

- [Address Screen](#)
- [Applicant Look-up Screen](#)
- [Client Look-up Screen](#)
- [Clone Property Screen](#)
- [Confirmation Dialog](#)
- [Email Screen](#)
- [Find Email Screen](#)
- [Matching Screen](#)
- [PDF Viewer/Print Order Screen](#)
- [Property Look-up Screen](#)
- [Report Preview Screen](#)
- [Rich Text Viewer/Editor](#)
- [SMS Text Messaging Screen](#)
- [Stored Templates Maintenance Screen](#)
- [Task Screen](#)
- [Warning Screen](#)

6.1 Applicants Matching Screen



This screen is displayed when matching applicants to properties from the [Properties Screen](#).


In the Applicants to Match Against group there are three check boxes, the meaning of which is as follows:

New	This check box is ticked by default and, if ticked, will include in the list of matched applicants those applicants that have not matched against the applicable property previously.
Previously Matched	This check box is unticked by default and, if ticked, will include in the list of matched applicants those that have previously been matched against the applicable property.
Only Match Applicants belonging to...	The initials of the negotiator dealing with the relevant property will appear here. Tick this check box if you only wish those applicants assigned to this negotiator to be included in the match. The other two check boxes are still applied.
Match Applicants Registered at	Select the branch's applicants you wish to match against. This defaults to all branches. If you only have one branch this option will not be shown. Multiple branches can be selected by ticking the check box against the branch name.

Untick the applicant statuses that you don't want to include in the search. These statuses are

configurable by your system administrator.

Clicking on the  button will select all statuses to include whilst clicking on the  button will unselect all of them.

Clicking on the  button closes this screen and proceeds with the matching process. The [Applicant/Property Matching Screen](#) will be displayed when this process is complete.


Closing this screen will abort the matching process.

6.2 Address Screen

This is a common screen that is used throughout Estate Agent Pro to add or amend addresses



If you have AFD Software's postcode lookup software [Postcode Plus](#) installed on the PC you are using, you will be able to use the postcode search capabilities. If not, the bottom half of the screen will be hidden and the options on the toolbar will be disabled. See [How do I use the postcode lookup?](#) for more information on this feature.

Your default Town, County and Country can be defined by your system administrator and will be automatically added for new addresses. If the Town, County, or Country entered is not known to the system you can add it by clicking the  button against it. This should only be done for frequently occurring locations.

When you have finished entering the address click on the  to exit, saving the address details.

Closing the screen discards any changes made.

6.3 Advanced Money Laundering (AML) Screen

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AML Risk Assessment - Randall Ken, The Old Barn, Tunbridge Wells, Kent, TN2 5HS

Have you met the individual?	In the office	2
Where is the individual resident?	UK National in UK	1
Is the transaction unusually large (e.g. £1m+)?	No	1
Is the transaction being conducted through a third party?	No	1
Have you verified property ownership?	Owner(s) verified via Land Registry check	1
Are there any other concerns/complications in the transaction?	No	1
Referred to AML Officer <input type="checkbox"/> Date <input type="text"/>	Total Score	7

Normal Risk - Proceed with sale/rent

AML Officer Feedback

If the score exceeds 8 the message displayed will change to:

High Risk - Refer to AML Officer

If this is the case you should report this to your internally appointed AML Officer and indicate that

you have done so here.

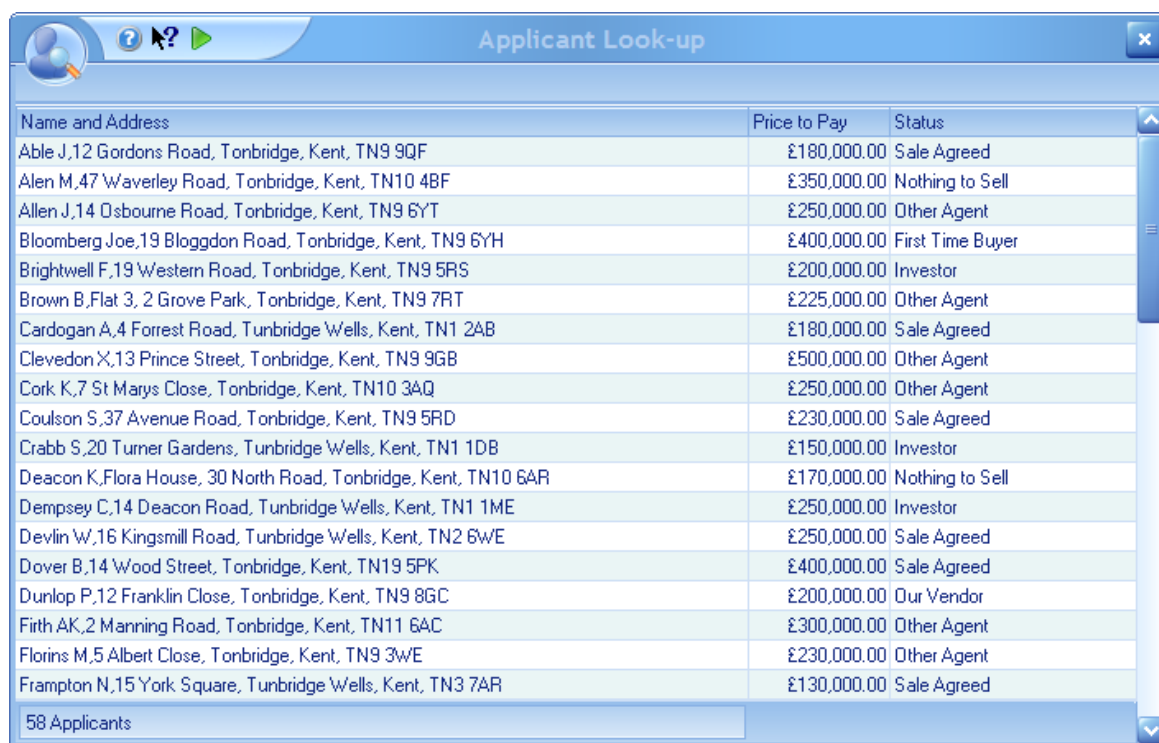
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6.4 Applicant Look-up Screen

The applicant look-up screen is invoked from several places and is used to select one or more applicants.



Name and Address	Price to Pay	Status
Able J, 12 Gordons Road, Tonbridge, Kent, TN9 9QF	£180,000.00	Sale Agreed
Alen M, 47 Waverley Road, Tonbridge, Kent, TN10 4BF	£350,000.00	Nothing to Sell
Allen J, 14 Osbourne Road, Tonbridge, Kent, TN9 6YT	£250,000.00	Other Agent
Bloomberg Joe, 19 Bloggdon Road, Tonbridge, Kent, TN9 6YH	£400,000.00	First Time Buyer
Brightwell F, 19 Western Road, Tonbridge, Kent, TN9 5RS	£200,000.00	Investor
Brown B, Flat 3, 2 Grove Park, Tonbridge, Kent, TN9 7RT	£225,000.00	Other Agent
Cardogan A, 4 Forrest Road, Tunbridge Wells, Kent, TN1 2AB	£180,000.00	Sale Agreed
Clevedon X, 13 Prince Street, Tonbridge, Kent, TN9 9GB	£500,000.00	Other Agent
Cork K, 7 St Marys Close, Tonbridge, Kent, TN10 3AQ	£250,000.00	Other Agent
Coulson S, 37 Avenue Road, Tonbridge, Kent, TN9 5RD	£230,000.00	Sale Agreed
Crabb S, 20 Turner Gardens, Tunbridge Wells, Kent, TN1 1DB	£150,000.00	Investor
Deacon K, Flora House, 30 North Road, Tonbridge, Kent, TN10 6AR	£170,000.00	Nothing to Sell
Dempsey C, 14 Deacon Road, Tunbridge Wells, Kent, TN1 1ME	£250,000.00	Investor
Devlin W, 16 Kingsmill Road, Tunbridge Wells, Kent, TN2 6WE	£250,000.00	Sale Agreed
Dover B, 14 Wood Street, Tonbridge, Kent, TN19 5PK	£400,000.00	Sale Agreed
Dunlop P, 12 Franklin Close, Tonbridge, Kent, TN9 8GC	£200,000.00	Our Vendor
Firth AK, 2 Manning Road, Tonbridge, Kent, TN11 6AC	£300,000.00	Other Agent
Florins M, 5 Albert Close, Tonbridge, Kent, TN9 3WE	£230,000.00	Other Agent
Frampton N, 15 York Square, Tunbridge Wells, Kent, TN3 7AR	£130,000.00	Sale Agreed
58 Applicants		

If multiple applicants can be selected you can do so by using the standard windows methodology. Shift key plus mouse click to select a range or control key plus mouse click to add to the selection.

When all applicants have been selected click on the  button in the quick access toolbar.

If you only wish to select a single applicant this can be accomplished by double clicking the appropriate applicant.

6.5 Archiving Screen

When archiving an applicant or a property a screen similar to the following is displayed.



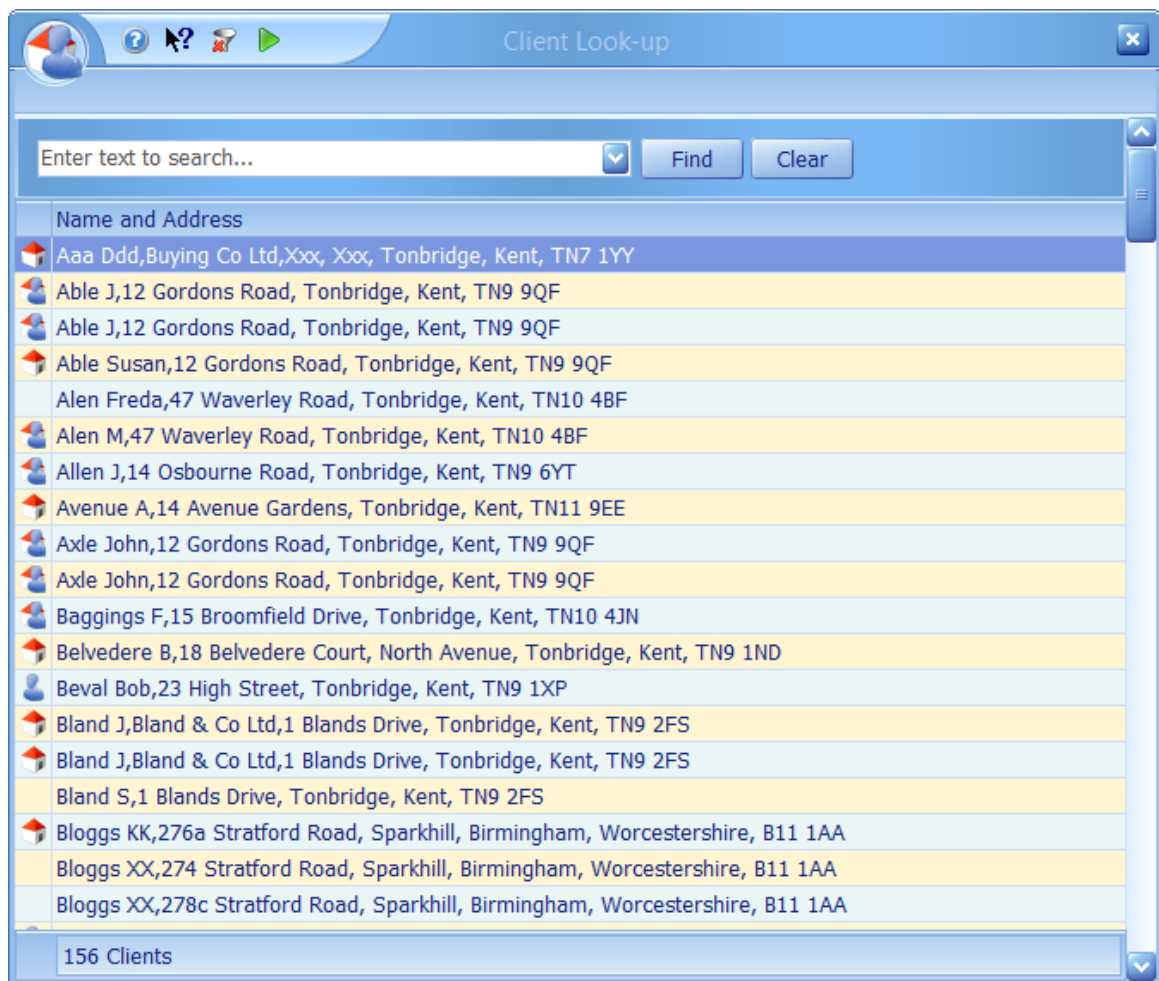
The screenshot shows a software window titled "Move Property to Archive?". The window has a blue header bar with a yellow folder icon containing a red 'A' and a question mark icon. The main content area is light blue and contains the title "Move Property to Archive?". Below the title are two lines of text, each followed by a checkbox: "Archive associated purchaser/lettee?" and "Edit client after archiving?". At the bottom of the window are two buttons: "Archive" with a green checkmark icon and "Don't Archive" with a red 'X' icon.

The first check box will only be displayed if it is a property being archived and the property is being let/purchased.




If the second check box is ticked then the Client screen for the vendor/landlord (and purchaser/lettee if applicable) will be opened for editing after archiving.

6.6 Client Look-up Screen


This screen is used from the [Client's Screen](#) when a client is cloned or when checking for possible duplicates.




A list of all appropriate clients is displayed. The image in the leftmost column indicates the type of client they are.

-  Applicant.
-  Vendor.
-  Both an applicant and a vendor.

Any part of the text can be searched on and will automatically happen after a short delay. When searching only those clients that match the search string will be displayed.

Select the appropriate client and then click on the  button on the quick action toolbar at the bottom of the screen. This can also be accomplished by double clicking the appropriate client.

Clicking on the  button will remove the current filter and show all clients including solicitors, estate agents, etc.

Closing the screen will automatically cancel the operation.


6.7 Clone Property Screen

Provides the ability to clone (copy) the current property as a new property. This is particularly useful in new build situations where several similar properties are for sale.

The screenshot shows a software window titled "Clone" with a close button (X) in the top right corner. The window has a light blue background and a header bar with a house icon, a help icon (?), and a save icon (floppy disk). The main content area is divided into three sections. The first section, labeled "Address", contains a text box with the address "The Old Barn", "Tunbridge Wells", "Kent", and "TN4 0HY". To the right of the text box is a vertical button with three dots. The second section, labeled "New Vendor", contains a text box with the vendor information "Mr Ken Randall", "12 Brick Street", "Westminster", "London", and "W13 7XR". To the right of the text box is another vertical button with three dots. The third section, labeled "Sale/Rent", contains a dropdown menu currently set to "Sale", a checkbox labeled "Ask Price" which is checked, and a text box containing the price "£895,000". Below these fields is a checkbox labeled "Include Images" which is also checked.

You must first specify a new address for the property. This is done by clicking on the button on the right hand side of the address which will display the address screen. In normal use this would just be a case of changing the house number and then clicking on the save button. See the [Address Screen](#) for further information.

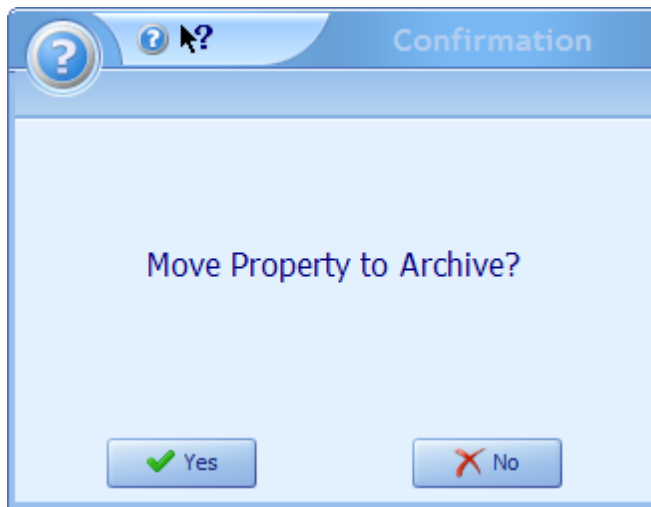
If you wish to change or add a new vendor click on the button on the right hand side of the New Vendor's address. In new build situations this will normally remain unchanged.

Modify the **Sale/Rent** and **Ask Price** fields as necessary and remove the tick from the **Include Images** checkbox if you don't want to include existing images. Then click on the Save  button. This will clone the property and scroll to it in the Properties Screen.

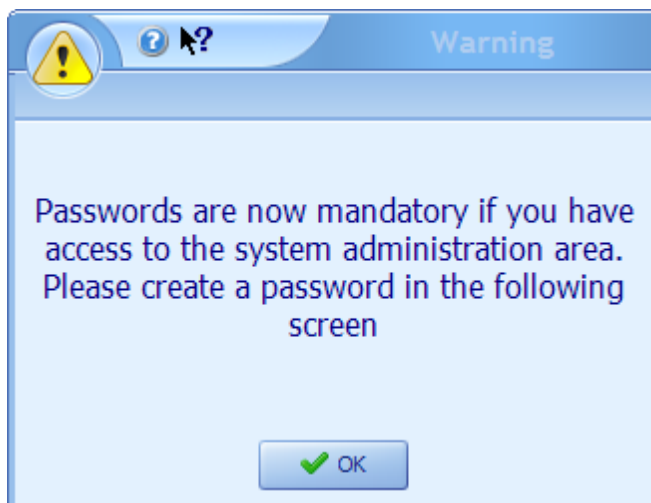
Closing the screen automatically cancels the cloning of the property.



6.8 Confirmation Dialog

All messages where you have to make a choice of how to proceed will be communicated to you via this standard dialog.




The Image shown ant the title will change depending on the nature of the message e.g.











The only way to close the dialog is to click on one of the buttons. Clicking on the  button will display this screen. If there is specific help available for this message, clicking on the  button and releasing it over the message will provide more information.






6.9 Copy Dated Note

Existing applicant or property dated notes can be copied to either a property or applicant respectively.

In the example shown below a dated note has just been added to an applicant. This note can be copied to a property once the note is saved by clicking on the  button.



Dated Notes 				
Date	Branch	Notes	Init	
19/11/2012	CRO	Wants to view 8 Journeys End but not available until end of the month.	KC	
10/08/2010	CRO	Coming into office Thurs at 9am	KAJ	
      				

The following screen will be displayed:





Copy Dated Note


Note



Wants to view 8 Journeys End but not available until end of the month. Mr Castillo has been informed.


Property  

Selection Criteria


☒ All

☐ Matched, Viewed or Offered

The property can be selected either by clicking on the  drop down button or the  look-up button. The selection criteria will be applied to either method.


The note can be amended, as shown, and once the property is selected the  button can be clicked to copy the note to the property.


The original dated note is then updated with a  to the right hand side of the note.

Date ▼	Branch	Notes	Init	
19/11/2012	CRO	Wants to view 8 Journeys End but not available until end of the month.	KC	
10/08/2010	CRO	Coming into office Thurs at 9am	KAJ	

When you click on this button in the future it will open the property screen focused to 8 Journeys End.

The corresponding entry in the dated notes of the respective property will be updated as follows:



Date ▼	Branch	Initials	Comments	
19/11/2012	CRO	KC	Wants to view 8 Journeys End but not available until end of the month. Mr Castillo has been informed.	


And, again, clicking on the  button will open the applicant screen focused to the originating applicant.

6.10 Dashboard Validity Check Screen

This screen is available from the [Dashboard Screen](#) and displays a list of warnings that will account for any missing data in the YTD Statistics.

Address	Property Status	Detail	Assigned User
First Floor Flat, 7 Athelstan Road, Cliftonville, Kent, CT9 2BD	Withdrawn	Valuation: Valuation Date not set	
Flat 1 Paragon Court, Fort Paragon, Margate, Kent, CT9 1JB	Available	Valuation: Valuation Date not set	
Flat 1, 12 Victoria Parade, Broadstairs, Kent, CT10 1QS	Available	Valuation: Valuation Date not set	
Flat 12, 12 Surrey Road, Cliftonville, Kent, CT9 2LA	Withdrawn	Valuation: Valuation Date not set	
Flat 2, 125 West Street, Tunbridge Wells, Kent, TN2 3AH	Exchanged	Exchanged: Exchange Date not set	Moz (CRO)
Flat 2, 125 West Street, Tunbridge Wells, Kent, TN2 3AH	Exchanged	Valuation: Valuation Date not set	Moz (CRO)
Flat 2, 3 Gladstone Road, Broadstairs, Kent, CT10 2HY	Withdrawn	Valuation: Valuation Date not set	
Flat 3, 30 Norfolk Road, Cliftonville, Kent, CT9 2HY	Withdrawn	Valuation: Valuation Date not set	
Flat 5 Surrey Court, 34-36 Surrey Road, Cliftonville, Kent, CT9 2LA	Withdrawn	Valuation: Valuation Date not set	
Flat 5, 30 Norfolk Road, Cliftonville, Kent, CT9 2HY	Withdrawn	Valuation: Valuation Date not set	
Flat 6, 30 Norfolk Road, Cliftonville, Kent, CT9 2HY	Withdrawn	Valuation: Valuation Date not set	
Ground Floor Flat, 10 Ethelbert Road, Cliftonville, Kent, CT9 1RY	Withdrawn	Valuation: Valuation Date not set	
Ground Floor Flat, 6 Wye Gardens, Palm Bay, Kent, CT9 3JL	Withdrawn	Valuation: Valuation Date not set	
Ground Floor Flat, 7 Athelstan Road, Cliftonville, Kent, CT9 2AL	Withdrawn	Valuation: Valuation Date not set	
Lower Ground Floor, 10 Ethelbert Road, Cliftonville, Kent, CT9 1RY	Withdrawn	Valuation: Valuation Date not set	
Lower Ground Floor, 7 Athelstan Road, Cliftonville, Kent, CT9 2BD	Withdrawn	Valuation: Valuation Date not set	
The Old Barn, Tunbridge Wells, Kent, TN2 5HS	Sale Agreed	Sales Agreed: Sales Negotiator not set	
The Old Barn, Tunbridge Wells, Kent, TN2 5HS	Sale Agreed	Valuations Attended: Valuer not set	
Top Floor Flat, 7 Athelstan Road, Cliftonville, Kent, CT9 2BD	Withdrawn	Valuation: Valuation Date not set	

The applicable property or applicant screen can be opened by clicking on the  or  buttons. They can also be opened by double clicking on the respective row.

The  button open the assigned user (if shown). This will display the user screen. Please note that this user may not be in your branch and care should be taken with changing any data.

This screen is only available to admin users with full access rights.

USAGE

In the highlighted row of the example given above the assigned sales negotiator has not been sets. Rectify by clicking on the View Property button whilst this row is selected and change accordingly.

6.11 Email Screen

All emails sent through Estate Agent Pro use this common interface.

EMAIL EDITOR SCREEN



This screen is accessed from numerous places within Estate Agent Pro.

Confirmation of which email account this email is being sent from is shown at the bottom of the screen. This is configurable by your system administrator.

Your own signature can be used in emails. Speak to your system administrator if you wish to use this facility.

The logo shown here is for example purposes and will be replaced by your own. Again, this is configurable by your system administrator.

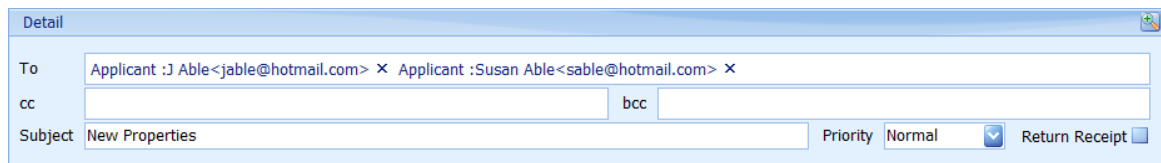
Sent emails will be stored under Draft & Sent Communications for each client.



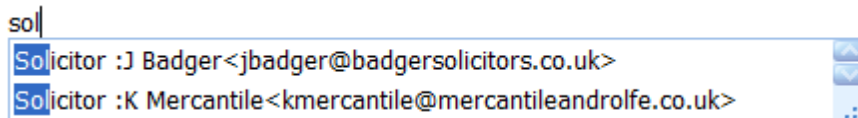
Please note that we can only guarantee that an email is sent to your outgoing email server, not received by the recipient. There are many reasons why an email may not arrive such as incorrect email address, junk filters, spam filters, etc. In the case of incorrect email addresses, your email server should eventually notify you via email, to the email address you are sending from, of these failures. In the other cases this cannot be detected. Also note that checking the Return Receipt box does not guarantee that a read receipt will be sent by the recipient as this can be turned off in Microsoft Outlook.

This screen can be broken down into 3 separate areas.

DETAIL PANEL




This example email is being sent to an applicant. Any emails that are associated with this applicant such as vendor, solicitor, etc. will appear in a drop down list of the To, cc and bcc list boxes based on what you start to type e.g. in this case 'sol':



Any other search string can be used. Entering a space will display all entries.

To include an address that is in the list select the entry in the drop down list. If you wish to add an email address that is not in the list just continue typing. The enter key must be pressed after you have finished typing.

The size of the To, cc & bcc boxes will automatically expand as more entries are made.

Clicking on the  button on the detail panel will open the email in an editor where fonts, colours, etc. can be changed. It also allows standard phrases to be inserted.

BODY OF EMAIL

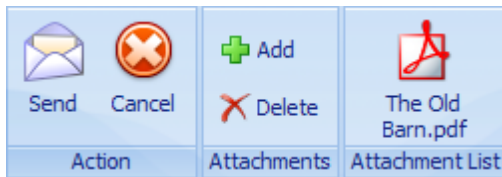


Signature blocks and company images are optional and can be defined by your system administrator.



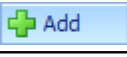


The Image displayed here is purely for example purposes.

Spell checking, similar to Microsoft Word is available here.

RIBBON BAR



The buttons on the ribbon bar have the following functionality:

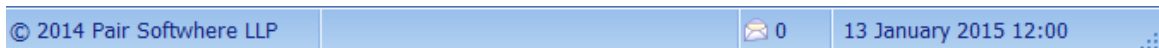
	Sends the email, stores it under Draft & Sent Communications for the respective client and closes this screen. See the Customer Communications Screen for more information.
	Discards the email and closes this screen.
	Opens a dialog allowing you to add any attachment.
	Deletes last attachment added.
	Displays graphically the attachments added. There can be any number of attachments. Clicking on the button will open the attachment.

SENDING OF EMAILS IN THE BACKGROUND

By default emails are sent in the foreground meaning that you have to wait for the email to be sent to your outgoing email server before you can continue doing anything else. A progress bar is displayed whilst this is happening.

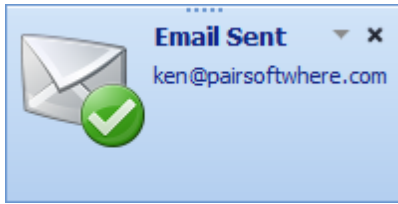
There is an option that your administrator can set so that emails can be sent in the background. Whether this option can be set for you or not is up to the administrator of your system and company policy. In any case, this option should not be set until you can successfully send emails in the foreground. Additionally, if you encounter any problem sending emails then this option should be disabled until the problem is resolved. It is not recommended that this option be set unless you are using at least a dual core processor.

When this option is set an additional panel is shown on the status bar showing the number of emails not yet sent. Only one email is sent at a time on a first in first out basis.

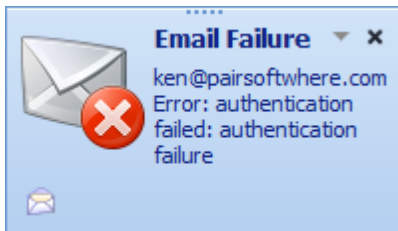


On exiting Estate Agent Pro you will be warned if there are any unsent emails. Unsent emails will not be lost on exiting, but will not be sent until you next log in to Estate Agent Pro again.

If the option is set to display sent emails then a notification for each email sent will be displayed at the bottom right of your screen for 7 seconds and then will be removed.




If the email is unable to be sent for any reason then a notification to this effect will also be displayed giving the applicable error message.




Please note that these errors will be a failure to connect or login to your outgoing mail server. Clicking on the open email button at the bottom left of the notification will display the letter you attempted to send.

6.12 Find Email Screen

You will be prompted to enter an email address to search for. If found the following screen is displayed.

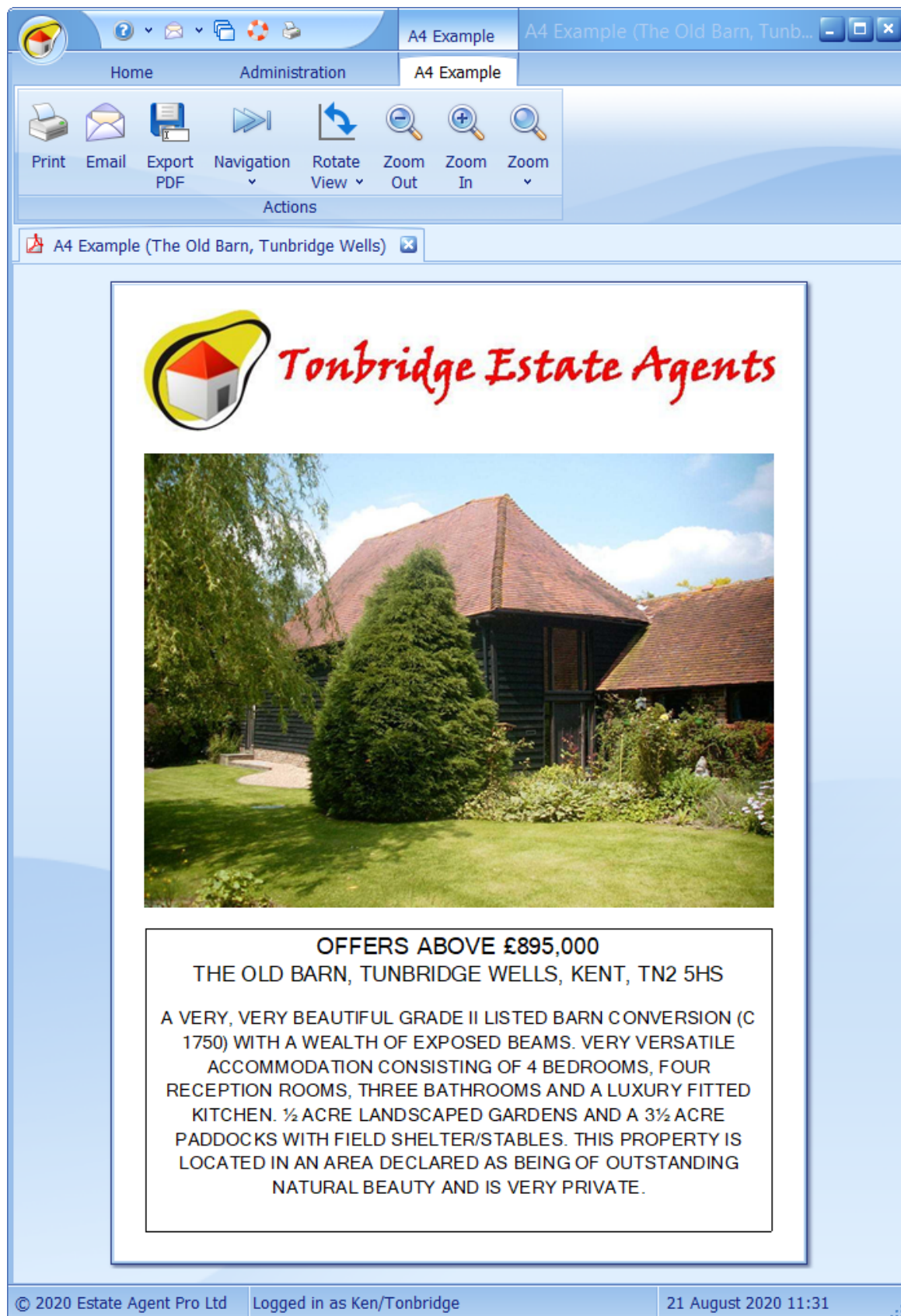
Either selecting the appropriate record and then clicking on the  button, or double clicking on the record will open the appropriate screen.

Clicking on the  button will open the clients screen.

If the client is an applicant, an additional applicant, a vendor or an additional vendor associated applicant/property addresses will be displayed. If the client is a solicitor then all non-archived applicants/properties where the solicitor is assigned will be displayed. If the client is an Estate Agent all non-archived applicants where the estate agent is assigned will be displayed. If the client is a surveyor then all non-archived properties where a survey has been entered for the surveyor will be displayed. If the client is a landlord all non-archived properties owned by the landlord will be displayed.

6.13 PDF Viewer

This is an internal PDF Viewer and is not dependent on Adobe being installed.

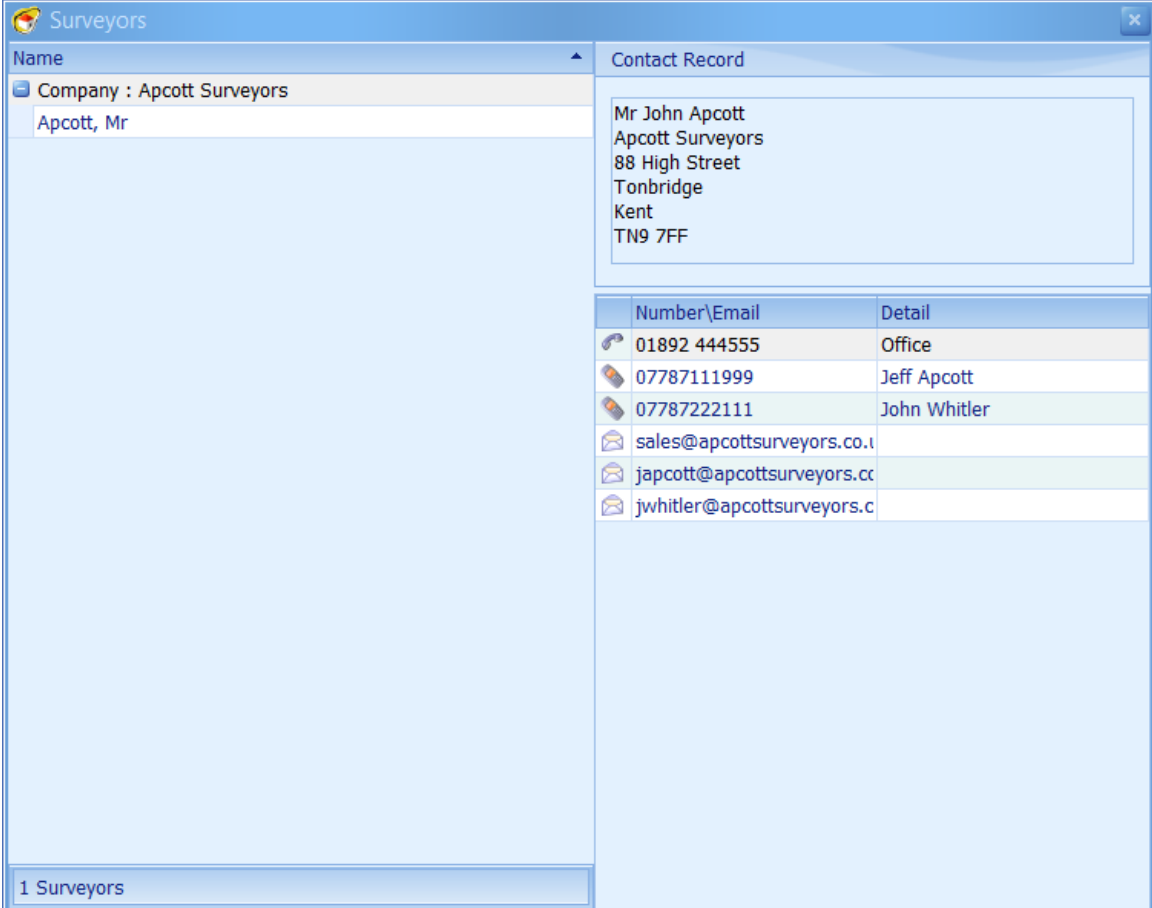


The use of this screen is self explanatory.

6.14 Professional Contacts Screen

This screen is accessed from the [Admin Tab](#) Professional Contacts button and allows users to look up the contact details of estate agents, solicitors and surveyors. The contact details cannot be edited.

The example shown below is for surveyors.

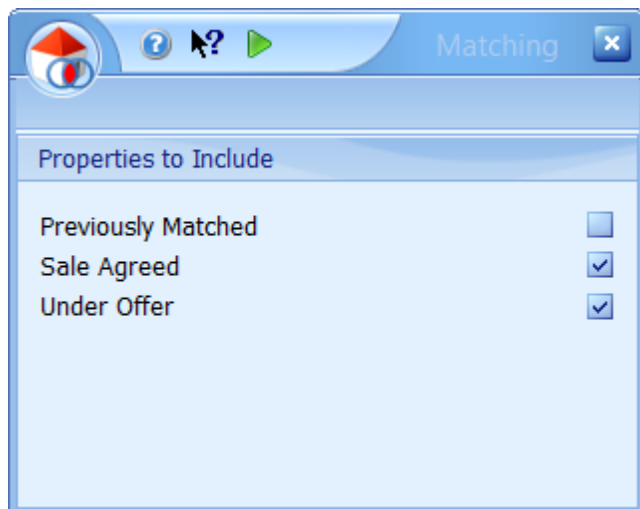


Number	Email	Detail
01892 444555		Office
07787111999		Jeff Apcott
07787222111		John Whitler
	sales@apcottsurveyors.co.uk	
	japcott@apcottsurveyors.co.uk	
	jwhitler@apcottsurveyors.co.uk	

All surveyors are shown for each company together with the address and all contact information.


6.15 Properties Matching Screen

This screen is displayed when matching properties to applicants from the [Applicants Screen](#).



Under **Properties to Include** there are three check boxes, the meaning of which is as follows:


Previously Matched	This check box is unticked by default and, if ticked, will include in the list of matched properties those that have previously been matched against the applicable applicant.
Sale Agreed	Whether to include sale agreed properties or not. The default set by your system administrator will be displayed here.
Under Offer	Whether to include properties under offer or not.

Clicking on the  button closes this screen and proceeds with the matching process. The [Applicant/Property Matching Screen](#) will be displayed when this process is complete.

Closing this screen will abort the matching process.

6.16 Property Look Up Screen

The property look-up screen is invoked from numerous places and is used to select one or more properties.



Address	Ask Price	Type	Beds	Bath	Rec	Sale	Value Date	Instruction Date	Sale Date	Sales Status	Branch
11 Popular Close, Tonbridge, Kent, TN9 1L	£210,000	Bungalow	2	1	2	Sale	23/09/2010	27/09/2010		Available	Tonbridge
2 Magdalen Road, Tonbridge, Kent, TN9 1L	£289,995	House	3	1	1	Sale	31/08/2010	04/09/2010		Valuation	Tonbridge
13 Pearl Road, Tonbridge, Kent, TN10 4RL	£249,000	House	3	1	2	Sale	15/07/2010	19/07/2010		Available	Tonbridge
14 Avenue Gardens, Tonbridge, Kent, TN11	£324,995	House	4	1	2	Sale	30/06/2010	04/07/2010		Available	Tonbridge
1 Cherry Close, Tonbridge, Kent, TN10 2EL	£350,000	Bungalow	4	1	1	Sale	06/09/2010	10/09/2010		Valuation	Tonbridge
1A Cherry Close, Tonbridge, Kent, TN10 2EL	£350,000	Bungalow	4	1	1	Sale	06/09/2010	10/09/2010		Valuation	Keymer Road
1 Lonsdale Avenue, Tonbridge, Kent, TN9 1L	£245,000	Bungalow	2	2	1	Sale	04/09/2010	08/09/2010		Valuation	Tonbridge
41 Gloucester Avenue, Tunbridge Wells, Kent	£208,000	House	4	1	2	Sale	05/07/2005	09/07/2005	25/07/2005	Sale Agreed	Tonbridge
40 Northumberland Avenue, Tunbridge Wells, Kent	£219,995	House	3	1	2	Sale	27/08/2010	31/08/2010	16/09/2010	Sale Agreed	Tonbridge
8 Journeys End, Tonbridge, Kent, TN10 4NL	£175,000	House	5	2	3	Sale	10/09/2010	14/09/2010	30/09/2010	Sale Agreed	Tonbridge
14 Ridgeway Road, Tunbridge Wells, Kent	£185,000	House	3	1	2	Sale	22/09/2010	26/09/2010	12/10/2010	Sale Agreed	Tonbridge
25 Green Road, Tonbridge, Kent, TN9 1BP	£249,995	Bungalow	3	1	1	Sale	28/06/2008	02/07/2008	18/07/2008	Completed (F	Tonbridge
5 Musgrove Road, Tonbridge, Kent, TN10 1L	£189,950	House	6	2	4	Sale	20/08/2012	04/09/2010		Available	Tonbridge
5 Rutland Gardens, Tonbridge, Kent, TN10 1L	£325,000	House	4	1	2	Sale	02/09/2010	06/09/2010		Available	Tonbridge
12 Green Road, Tonbridge, Kent, TN9 1LZ	£236,995	House	4	1	2	Sale	10/09/2010	14/09/2010		Withdrawn	Tonbridge
18 Northdown Road, Tonbridge, Kent, TN11 1L	£200,000	House	1	1	1	Sale	08/09/2010	12/09/2010		Available	Tonbridge
18 Belvedere Court, North Avenue, Tonbridge, Kent	£104,995	Flat	2	1	1	Sale	07/09/2010	11/09/2010		Available	Tonbridge
3 Park Avenue, Tonbridge, Kent, TN10 3EL	£344,950	House	5	2	5	Sale	19/08/2010	23/08/2010		Available	Tonbridge
19 Cardogan Close, Tunbridge Wells, Kent	£249,995	Bungalow	2	1	1	Sale	29/08/2010	02/09/2010	18/09/2010	Sale Agreed	Tonbridge
11 Cruckshank Way, Tunbridge Wells, Kent	£268,500	House	4	2	3	Sale	23/09/2010	27/09/2010		Available	Tonbridge
15 Northdown Road, Tunbridge Wells, Kent	£215,000	Bungalow	2	1	2	Sale	07/07/2010	11/07/2010		Available	Tonbridge

73 Properties

If multiple properties can be selected you can do so by using the standard windows methodology. Shift key plus mouse click to select a range or control key plus mouse click to add to the selection. Multiple selection is illustrated above.

The property list can be printed by clicking on the  button.

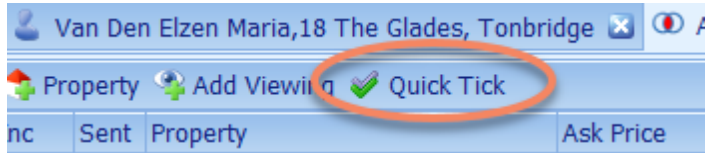
When all properties are selected click on the  button in the quick access toolbar. If you only wish to select a single property this can be accomplished by double clicking the appropriate property.



This grid has the ability of being grouped by columns. See [How do I use grid column grouping and filtering?](#) for further information.


6.17 Quick Inclusions Screen

When in the [Applicant/Property Matching Screen](#) if you have lots of matches, depending on the speed of your server and network ticking which applicants/properties to include can be slow as this has to load the letter and contact details and also record that a match has been done or not. To get round this a button has been added to the toolbar above the list of matches.



Clicking on this button will display the same info in a separate screen:



This dialog has the advantage of not updating the database until you click on the  button.

6.18 Registration Screen

This screen is displayed when Estate Agent Pro is run for the first time.



If you have been provided with a **Licence Key** then drag and drop the **Licence Key** attachment provided by email onto the **Licence Key Drop Box** and then click on the **Register** button. If you are a trial user then this screen will be displayed every time that you run EAP. The number of days remaining will be displayed on the **Trial** button. The trial is licenced for 14 days from the time of installation. Click on the Trial button to continue.



You must confirm that you have read the **technical specification** prior to proceeding with the installation. Click on the link to view this specification in your browser.

6.19 Report Preview Screen

All standard (non-grid) reports are displayed in this viewer.

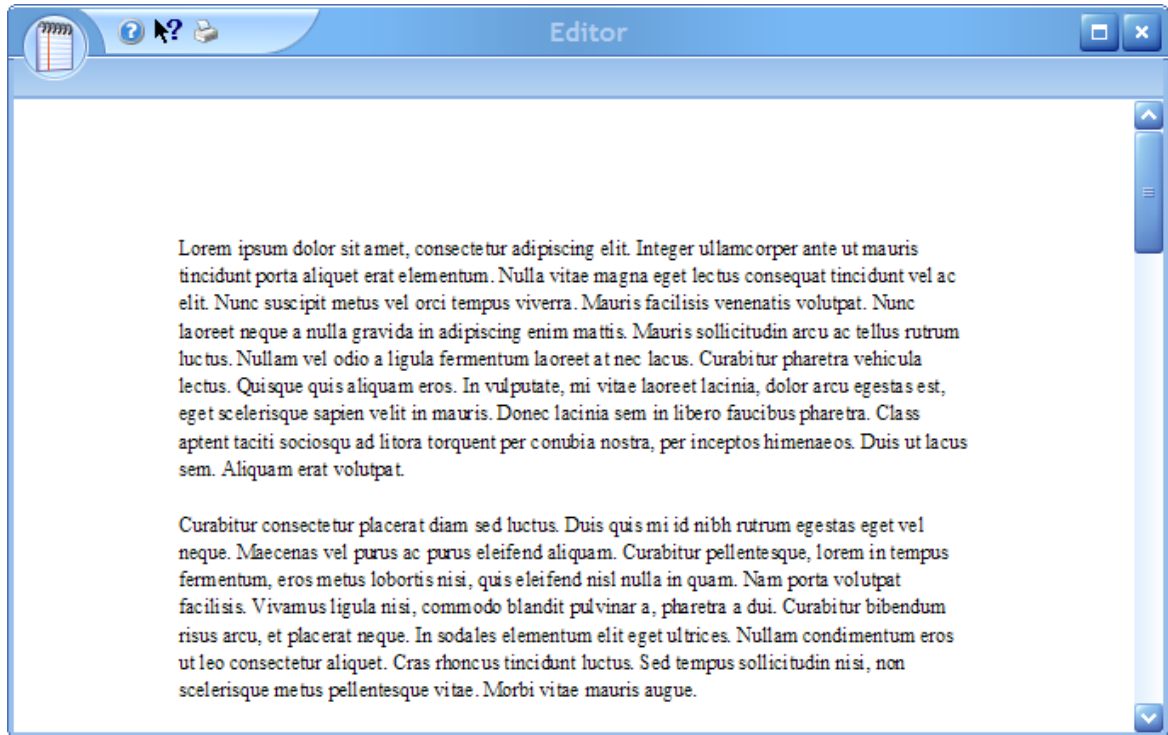
Registration Date	Negotiator	Address	Vendor	Price	Status	Last Contact
20/08/2010	KH	11 Popular Close, Tonbridge, Kent, TN9 1UP	Mr N Popular	Ask: £210,000 Sale:	Available	
10/02/2006	TTC	2 Magdalen Road, Tonbridge, Kent, TN9 1XD	Miss A Guildford	Ask: £289,995 Sale:	Valuation	
14/06/2005	KH	13 Pearl Road, Tonbridge, Kent, TN10 4RL	Mr P Pearl	Ask: £249,000 Sale: £0	Available	28/11/2009 15:39:01
31/07/2010	JS	14 Avenue Gardens, Tonbridge, Kent, TN11 9EE	Mrs A Avenue	Ask: £324,995 Sale: £0	Available	
24/06/2005	KAR	1 Cherry Close, Tonbridge, Kent, TN10 2EF	Mrs V Cherry	Ask: £350,000 Sale:	Valuation	09/03/2012 14:29:11
24/06/2005	KAR	1A Cherry Close, Tonbridge, Kent, TN10 2EF	Mrs V Cherry	Ask: £350,000 Sale:	Valuation	
30/01/2006	PW	1 Lonsdale Avenue, Tonbridge, Kent, TN9 1SA	Miss F Lonsdale	Ask: £245,000 Sale:	Valuation	
04/08/2010	TC	41 Gloucester Avenue, Tunbridge Wells, Kent, TN4 8NN	Mr & Mrs G Gloucester	Ask: £208,000 Sale: £206,000	Sale Agreed	
13/01/2006	KH	40 Northumberland Avenue, Tunbridge Wells, Kent, TN2 5JW	Mr & Mrs N North	Ask: £219,995 Sale: £217,500	Sale Agreed	
29/07/2010	PW	8 Jouneys End, Tonbridge, Kent, TN10 4NG	Mr A Castillo	Ask: £175,000 Sale: £170,000	Sale Agreed	31/08/2010 09:54:50
30/09/2005	TC	14 Ridgeway Road, Tunbridge Wells, Kent, TN4 0AP	Mr & Mrs R Ridgeway	Ask: £185,000 Sale: £180,000	Sale Agreed	
24/06/2005	JS	25 Green Road, Tonbridge, Kent, TN9 1BP	Mr G Grober	Ask: £249,995 Sale: £249,995	Completed (Paid)	


The meaning of the buttons on the ribbon bar is obvious so will not be explained with the exception of ordering prints. The colour used in reports is configurable by your system administrator .

 Store Document	If you have generated an EAP template this button will be enabled and will allow you to store the generated template for the applicable property.
 Close	Closes this preview.

6.20 Rich Text Viewer/Editor

This viewer is used in various places in Estate Agent Pro.



The contents displayed can be printed by using the  button.

6.21 SMS Text Messaging Screen


All SMS text messages sent through Estate Agent Pro use this common interface.



The screenshot shows a window titled "Text Messaging". At the top left, there is a mobile phone icon, a help icon (question mark), a mouse cursor icon, and a green play button icon. The main area contains a text input field for the "Mobile No" with the value "07787234673". Below this is a larger text area for the message, with the instruction "Enter message to send (messages over 160 characters split)". The message content is: "Hi Mr Jones", "Great new property, just up your street see", "http:\\www.tonbridgeestateagents.co.uk\\CRO0001234.php.", "Regards,", and "Ken". At the bottom left of the message area, it says "133 characters". A close button (X) is in the top right corner.

Text messages should be kept below 160 characters to avoid them being split into two or more separate messages.

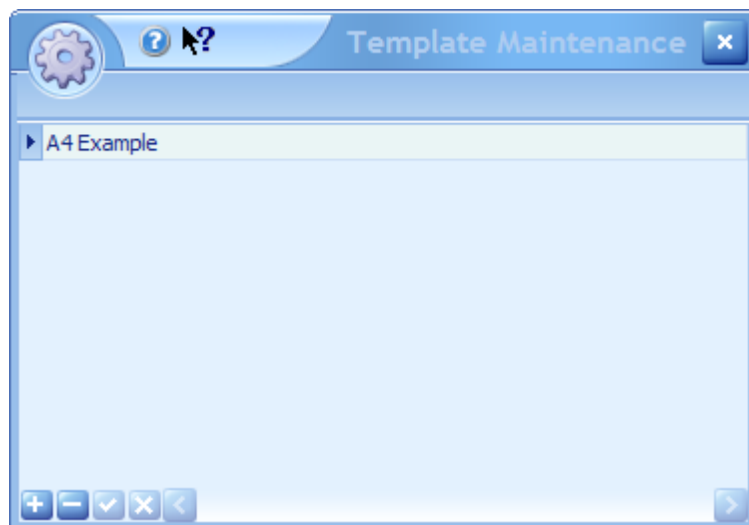
A count of the length of the text message is shown at the bottom of the screen.

When you have entered the text message click on the  button to send the message and close this screen.

Sent text messages will be stored under Draft & Sent Communications for each client.

6.22 Stored Templates Maintenance Screen

Templates can be stored for each property and can be added, deleted or renamed using this screen.



Stored Templates can be deleted by clicking on the ✗ button.

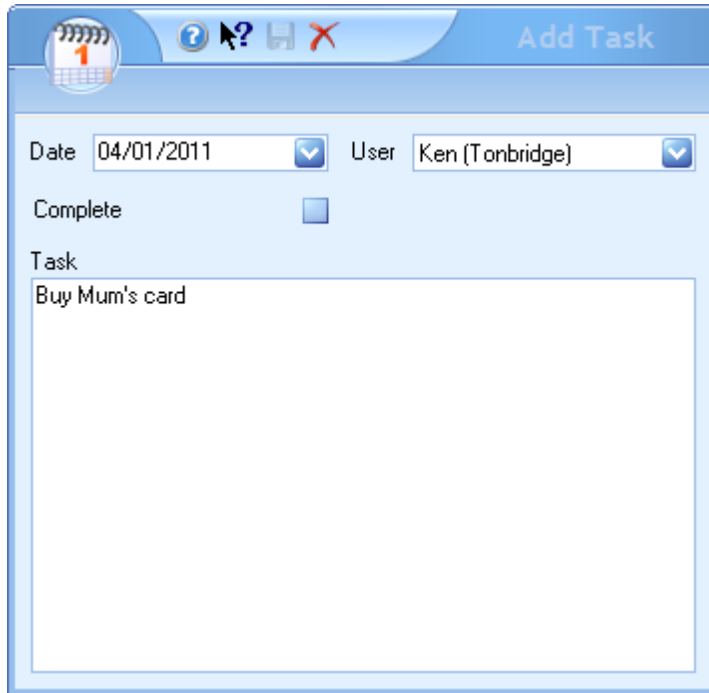
To add an external PDF document click on the + button.

The name of the template can be edited. To save changes click on the ✓ button.

For more information see [How do I use the navigation buttons?](#)

6.23 Task Screen

Tasks can be added for any user from the [Diary Screen](#).



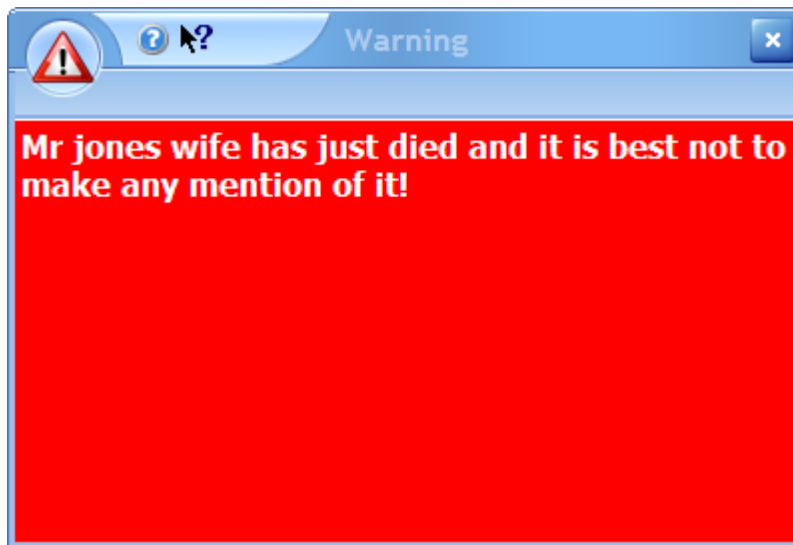
The screenshot shows a window titled "Add Task". At the top left is a calendar icon with the number "1". To its right are icons for help, a mouse cursor, save, and close. The "Date" dropdown is set to "04/01/2011" and the "User" dropdown is set to "Ken (Tonbridge)". Below these is a "Complete" checkbox, which is currently unchecked. A large text area labeled "Task" contains the text "Buy Mum's card".

When a task is set as complete it will no longer be displayed in the diary.


Incomplete tasks will be automatically carried forward to the next day.

6.24 Warning Screen

A warning message can be defined for each vendor that will be displayed each time you access the property.



The message displayed is that configured on the [Vendor Notes Tab](#).

 *It is suggested that this is used sparingly as over usage becomes annoying and meaningless!*

ESTATE AGENT PRO

Part



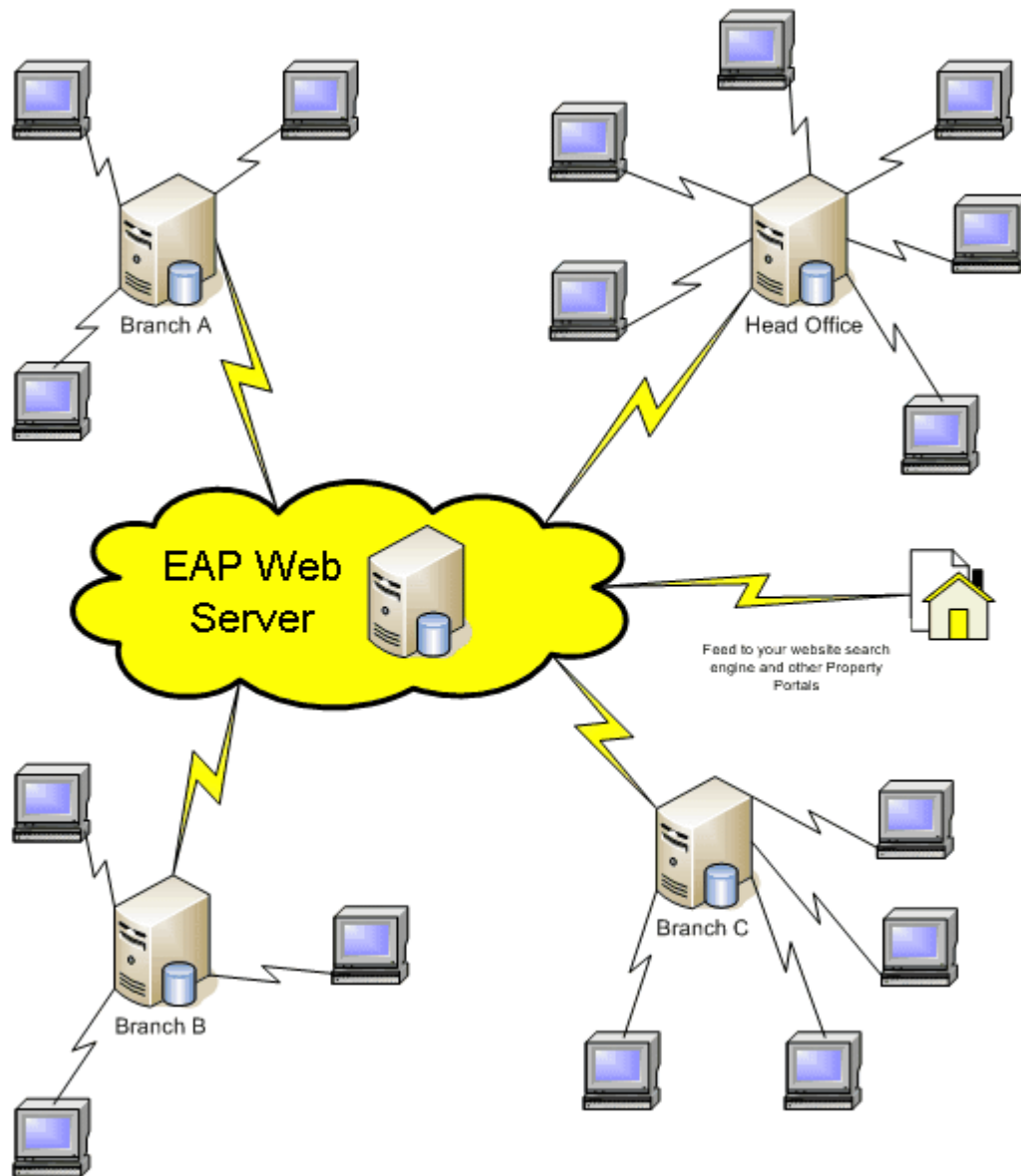
VII

Synchronisation

7 Synchronisation

Synchronisation of data between branches is now completely automated via one of our web based servers and takes place in near real-time.

ENTERPRISE NETWORK DIAGRAM



Each branch can choose which other branches they wish to receive data from.

OPERATIONAL PROCEDURES

As users enter data into Estate Agent Pro Enterprise a database trigger automatically replicates these changes to a dedicated synchronisation table.

An EAP service is permanently running on the EAP server at all branches. This service monitors changes made to this table and uploads these changes every minute. In addition, if there is nothing to upload, once an hour the EAP service uploads a "keep alive" notification so that if nothing has

been received within an hour, we know that we need to investigate why.

The EAP Service also monitors all changes made by other branches and updates your database accordingly.

The EAP Service will be automatically started whenever your server is restarted and will continue the synchronisation without loss of data should communication be lost.

ESTATE AGENT PRO

Part



System Administration

8 System Administration

The administration of the system is accessed by clicking on the Administration tab on the main screen and then clicking on the Options button.



The Administration tab gives access to both a protected area of the system and user administrative functions. For user administrative functions please see the [Admin Tab](#).

To access the System Options users will be prompted to re-enter their login password to gain access to this area. Login passwords are mandatory for users who have been given access rights. If they do not have a password currently set, they will be forced to enter one before being granted access.

This Admin Options Screen is only to be used by trained personnel with as few people as possible having access.



All options connected with the running of Estate Agent Pro can be changed here.

Clicking on an option preceded by a ▶ will open that set of options in the right hand part of the screen. The selected option will be indicated by an ► image.

This screen consists of 8 option groups:

[Administration Options](#)
[Applicant Options](#)
[Company Options](#)
[Contacts Options](#)
[General Options](#)
[Modules Options](#)
[Property/Vendor Options](#)
[System Options](#)

Most of these changes will not be seen by users until they log back into the system. It is therefore recommended that changes are not made whilst users are logged in.

If you are a multi-branch operation, and you are synchronising data between branches, all classifications and other pertinent data must be consistent across branches.







Changes made here could stop your system working altogether and therefore changes should only be made by properly trained personnel.

Changes can be saved at any time by clicking on the button on the quick action toolbar.



8.1 Administration Options

APPOINTMENTS

Default Valuation Appointment Time	60	 	min
Default Viewing Appointment Time	60	 	min
Check for Overlapping Viewings within 1 hour	<input checked="" type="checkbox"/>		

The default time (length) for valuation and viewing appointments is set here. The default is one hour.

When accompanied viewings are added to the system it can check that viewings, for the same accompanee, do not overlap. This can be enabled or disabled by means of the checkbox.

8.2 Applicant Options

CLASSIFICATIONS

ID	Classification Name
1	Category


Up to five classifications can be defined for applicants. These must be common across all branches. Once defined the input of them is mandatory for all applicants. Please bear in mind that when these classifications are changed, the classifications set for all existing applicants will also need to be changed.

Clicking on any Classification Name will display the entries for that classification.

Classifications can be added by clicking on the  button on the navigation panel. See [How do I use the navigation buttons?](#) for more information.

No	Description
1	Cat 1
2	Cat 2
3	Cat 3a
4	Cat 3c
5	Cat 3d
6	Cat 4
7	Cat 5
8	Investor
9	
10	

Up to 31 entries can be defined for each classification. In the example given above they are cryptic in case applicants see the applicant screen where they are used.

When you have finished making changes click the  button on the navigator panel to save the changes.

FORCE REFRESH

Ref	Last Amended	Name/Address
CRO0001895	05/04/2006 10:24:21	Alen M, 47 Waverley Road, Tonbridge, Kent, TN
CRO0003128	10/04/2006 17:12:20	Allen J, 14 Osbourne Road, Tonbridge, Kent, TN
CRO0006617	02/05/2006 13:12:02	Bloomberg Joe, 19 Bloggdon Road, Tonbridge, Kent, TN
CRO0004062	03/04/2006 10:13:31	Brightwell F, 19 Western Road, Tonbridge, Kent, TN
CRO0005066	11/04/2006 13:33:58	Brown B, Flat 3, 2 Grove Park, Tonbridge, Kent, TN
CRO0003075	11/02/2006 15:15:03	Cardogan A, 4 Forrest Road, Tunbridge Wells, Kent, TN
CRO0005816	15/04/2006 09:51:58	Clevedon X, 13 Prince Street, Tonbridge, Kent, TN
CRO0002259	09/01/2006 12:32:00	Cork K, 7 St Marys Close, Tonbridge, Kent, TN
CRO0004365	17/03/2006 09:24:56	Coulson S, 37 Avenue Road, Tonbridge, Kent, TN
CRO0000227	03/03/2006 14:37:28	Crabb S, 20 Turner Gardens, Tunbridge Wells, Kent, TN
CRO0002461	09/01/2006 09:40:22	Deacon K, Flora House, 30 North Road, Tonbridge, Kent, TN
CRO0002473	27/03/2006 17:43:07	Dempsey C, 14 Deacon Road, Tunbridge Wells, Kent, TN
CRO0004213	06/02/2006 12:00:13	Devlin W, 16 Kingsmill Road, Tunbridge Wells, Kent, TN
CRO0001081	06/04/2006 10:21:32	Dover B, 14 Wood Street, Tonbridge, Kent, TN
CRO0000408	15/04/2006 09:42:40	Dunlop P, 12 Franklin Close, Tonbridge, Kent, TN
CRO0001846	15/04/2006 09:51:48	Firth AK, 2 Manning Road, Tonbridge, Kent, TN
CRO0003054	24/02/2006 10:25:00	Florins M, 5 Albert Close, Tonbridge, Kent, TN
CRO0003989	03/02/2006 11:56:32	Frampton N, 15 York Square, Tunbridge Wells, Kent, TN

57 Records

Ref	Name/Address
CRO0000982	Able J, 12 Gordons Road, Tonbridge, Kent, TN

1 Records

If you are advised by technical support to refresh (re-synchronise) an applicant this is where it can be done. Either click on the applicant in the applicant list or use the progressive search facility to locate them and then click on the button. As many applicants can be refreshed as required but please do not refresh applicants unnecessarily. Applicants can be removed from the refresh list by clicking on them and then clicking on the button.

To process the applicants to be refreshed click on the button. Unless the synchronisation process is busy with a large upload or download all data connected with these applicants will be refreshed to all branches in the background within a minute or so. There is no need to keep this screen open.



Please note that this option will be disabled if you only have one branch.

OPTIONS

Fill in New Applicants Search Criteria with Branch Name	No
Include in Matching/Mailing	Yes
Include Sale Agreed and Under Offer Properties when Matching	Yes
Maximum Price Tolerance	10 %
Minimum Price Tolerance	20 %
Print File Card on Applicant Deletion	No
Store Applicant Matches as Events	Yes
Store Applicant Matches only after Sending Letter, etc	No

Fill in New Applicants Search Criteria with Branch Name

If this option is selected then any new applicant will have the name of your branch entered in to their area search criteria. This means that, unless changed,

	they will not match with any property that is not in your town. It is recommended that you leave this option set as 'No'.
Include in Matching Mailing	If this option is set to 'No' then every new applicant will have to have the corresponding option on the Applicants Screen set manually. It is recommended that you leave this option set to 'Yes'.
Include Sale Agreed and Under Offer Properties when Matching	Whether or not to include sale agreed and under offer properties when matching properties from the Applicants Screen .
Maximum Price Tolerance	Setting this will increase the applicants maximum price threshold by the specified percentage purely for matching purposes. The default for this is 0% which is the equivalent of off.
Minimum Price Tolerance	Setting this will decrease the applicants minimum price threshold by the specified percentage purely for matching purposes. The default for this is 0% which is the equivalent of off.
Print File Card on Applicant Deletion	This option is included for historical purposes and it is recommended that this option is left set as 'No'.
Store Applicant Matches as Events	By default, when a property is matched with an applicant, or vice versa, it is recorded as an event. If this option is turned off then you will have no record of it. It is strongly recommended that you leave this option set to 'Yes'.
Store Applicant Matches only after Sending Letter, etc.	As an alternative, you can set this option which will then only store a matching event when a communication is sent to them from the Applicant/Property Matching Screen . It is recommended that you leave this option set as 'No'.

PRINT BLANK CARDS




Click on this button to print any number of blank applicant cards. It is recommended that you add applicants directly into the system rather than record them manually first.

STATUS

No	Description	Colour	
1	First Time Buyer		
2	Nothing to Sell		
3	Sale Agreed		
4	Cash Buyer		
5	Not on Market		
6	Other Agent		
7	Our Vendor		
8	Investor		
9	Other		




Up to 31 applicant statuses can be defined for applicants. These must be common across all branches. Once defined the input of them is mandatory for all applicants. Please bear in mind that when these statuses are changed, the statuses set for all existing applicants will also need to be changed. A colour can be assigned to each status.

Click the  button on the navigator panel to save changes. Moving to another row will automatically save changes.

8.3 Company Options


BRANCH



Options pertaining to your branch, or any other branch can be changed here. It is recommended that you do not add or change any branches, other than your own unless instructed to do so by technical support. Your branch will be displayed by default.

Mnem	Branch Name
BIR	Brighton
MAR	Crowborough
KEY	Keymer Road
HER	Sevenoaks
▶ CRO	Tonbridge
ISS	Tunbridge Wells
6 Branches	
   	

Branches can be navigated, added or deleted by using the navigation panel at the bottom of the left hand side of the branch list.

See [How do I use the navigation buttons?](#) for more information.

Once all changes have been made click on  the button to save them.

General	
This Branch	Yes 
Mnemonic	TON
Branch Name	Tonbridge
Branch Reference	
Address	1 High Street Tonbridge Kent TN9 1ST 
Branch Manager	Ken Jones
Local Authority	Tonbridge County Council

This Branch	This defines the branch selected as yours. Under no circumstances change this unless instructed to do so by technical support.
Mnemonic	This is the mnemonic that was assigned to your branch, normally the first three characters of your branch name and cannot be changed once defined.
Branch Name	The branch name should be the name of the town you are located in.

Branch Reference	This is for your own use and can be used in standard letters.
Address	The address of your branch can be changed by clicking on the button on the right hand side of the address. See How do I change an address? for further information.
Branch Manager	The name of your branch manager which can be used in standard letters.
Local Authority	Your default local authority which will be used for any new property.

Default Rates

Sole Commission	<input type="text" value="2.00%"/>
Dual Commission	<input type="text" value="2.50%"/>
VAT	<input type="text" value="17.50%"/>

Sole Commission	The default sole commission rate to be applied to any new property.
Dual Commission	The default dual commission rate to be applied to any new property.
VAT	The current VAT rate applied when calculating commissions.

Web/Portals

Field to Use

☐ Summary Details

☒ Advert & Portal Text

Summary Details	Defines which property field should be uploaded to your website and portals as summary data.
Advert & Portal Text	

Contact Info

Telephone	<input type="text" value="01892 111111"/>	Email	<input type="text" value="sales@tonbridgeestateagents.com"/>
Fax	<input type="text" value="01892 222222"/>	DX	<input type="text" value="333333"/>

The default contact details to be displayed in standard letters. The email address will be used in all emails to clients if no email is defined on a per user basis.





Email Validation Logon Information

Username	<input type="text" value="zen9999@zen.co.uk"/>	Password	<input type="password" value="*****"/>
Authentication	<input type="text" value="Required"/>	SMTP Port	<input type="text" value="25"/>
Email Server	<input type="text" value="smtp.zen.co.uk"/>		


This is the information required to be able to connect to your outgoing mail server and is normally

supplied by your internet provider.

Username	the username required to login.
Password	The password required to login.
Authentication	Select the appropriate authentication method from the drop down list.
SMTP Port	The port number to be used.
Email Server	the address of the email server.



Variable Commission Rates	
Price Above	Commission
£0	2.00%
£500,000	1.90%
£1,000,000	1.75%
   	

If you use variable commission rates based on the price the property is sold at they can be defined here.

New price bands can be added by clicking on the  button on the navigation panel. See [How do I use the navigation buttons?](#) for more information.





In this example properties sold up to £500,000 will be at 2.00%, between £500,000 and £1,000,00 at 1.90% and above £1,000,000, at 1.75%.

GENERAL

Company Name	<input type="text" value="Tonbridge Estate Agents"/>
VAT Number	<input type="text" value="77777777"/>
Web Address	<input type="text" value="www.tonbridgeestateagents.com"/>
Include In Emails	
Email Logo	<input type="text" value="Yes"/> 
Signature Block	<input type="text" value="Yes"/> 

Company Name	The name of your Company.
VAT Number	Your VAT number.
Web Address	Your company website.
Include in Emails - Email Logo	If an email logo is defined in the section below, whether or not to use it in emails.
Include in Emails - Signature Block	If a signature is defined for users under Administration Options this setting defines whether or not to use it in emails.

IMAGES

Default Document Folder	C:\Users\Ken\Documents
Default Image Folder	C:\Users\Ken\Pictures
Maintain Aspect Ratio of Images	No
Print Images Directly to Printer	No
Report Banner	 Tonbridge Estate Agents
Memorandum of Sale	
Composite Banner	 <div> <p>This is the new Composite</p> <p>Last updated 27/10/2021</p> <p>SALE AGREEMENT</p> </div>
Banner Image	
Banner Message	<p>Merry Christmas and a happy New year to all members of staff. Thanks for your help in 2017 in making us the top Estate Agent in the South East. I have a feeling that 2018 will be a great year!</p> <p>EAP Rocks!!!</p>
Tenancy Fees Template	<p>Holding Deposit: 1 week's rent Deposit: Up to 5 weeks rent Breach of agreement default fee Reasonable costs for any request to change the terms of the tenancy Legal and court fees as awarded by the Court Early termination fee £60.00 including VAT</p>

Default Image Folder	This is the default image folder to use when capturing images in the Images Screen . This should normally be a shared folder.
Maintain Aspect Ratio of Images	Whether or not to maintain the aspect ratio of images in reports. If set to 'Yes' then, if different cameras are used, with varying resolutions the size of the images in multi-image reports will be different. It is recommended that this option is left as 'No'.
Print Images Directly to Printer	Some printers require this setting to be set. Unless necessary leave this option set as 'No'.
Report Banner Image	The image to be used across the top of reports. The recommended sizes are shown. To add an image click on the button on the right hand side of the image placeholder.
Memorandum of Sale Image	The image to be used in sales memorandums. The recommended sizes are shown. To add an image click on the button on the right hand side of the image placeholder.
Email Logo	The logo to be used in emails. This should be as small as possible whilst still maintaining clarity and should be experimented with. The use of overly large images will slow down the sending of emails. To add an image click on the button on the right hand side of the image placeholder.
Banner Image	This image will be displayed in the bottom right hand corner of the

	main screen. This can be any size but to be displayed must fit within the boundaries of the main screen. Take into account that users may not be using the application maximized.
Banner Message	This message will be displayed centered in the top half of the main screen above the banner image. The font will be automatically reduced to fit the screen horizontally.
Composite Banner	Creating a Composite Banner overrides the Banner Image and the Banner Message. An internal Word like editor is used to configure this and gives you full control over what is displayed including the background color. When this banner is changed it will automatically be refreshed on all users PC after they have done nothing in EAP for one minute.
Tenancy Fees Template	Default Tenancy Fees declaration can be entered here.

TARGETS


Targets ticked here will be displayed in the YTD statistics on the [Dashboard Screen](#).

Targets

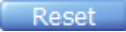
- ☒ Applicants registered
- ☒ Exchanges
- ☒ Exchanges fee value (£)
- ☐ Fall throughs
- ☐ FS Appointments made/referred
- ☒ New Instructions
- ☒ Offers received
- ☒ Sales
- ☒ Sales fee value (£)
- ☒ Valuations booked
- ☒ Valuations attended
- ☒ Viewings booked
- ☐ Withdrawals

USERS


Name	Password
▶ Ken Clarke	Reset
Moz Hooper	Reset
Robert Roofer	Reset
Clive Lately	Reset
   	

Users can be added by clicking on the  button on the navigation panel. See [How do I use the navigation buttons?](#) for more information.

Details for existing users can be changed by clicking on the respective user and changing the details shown below.

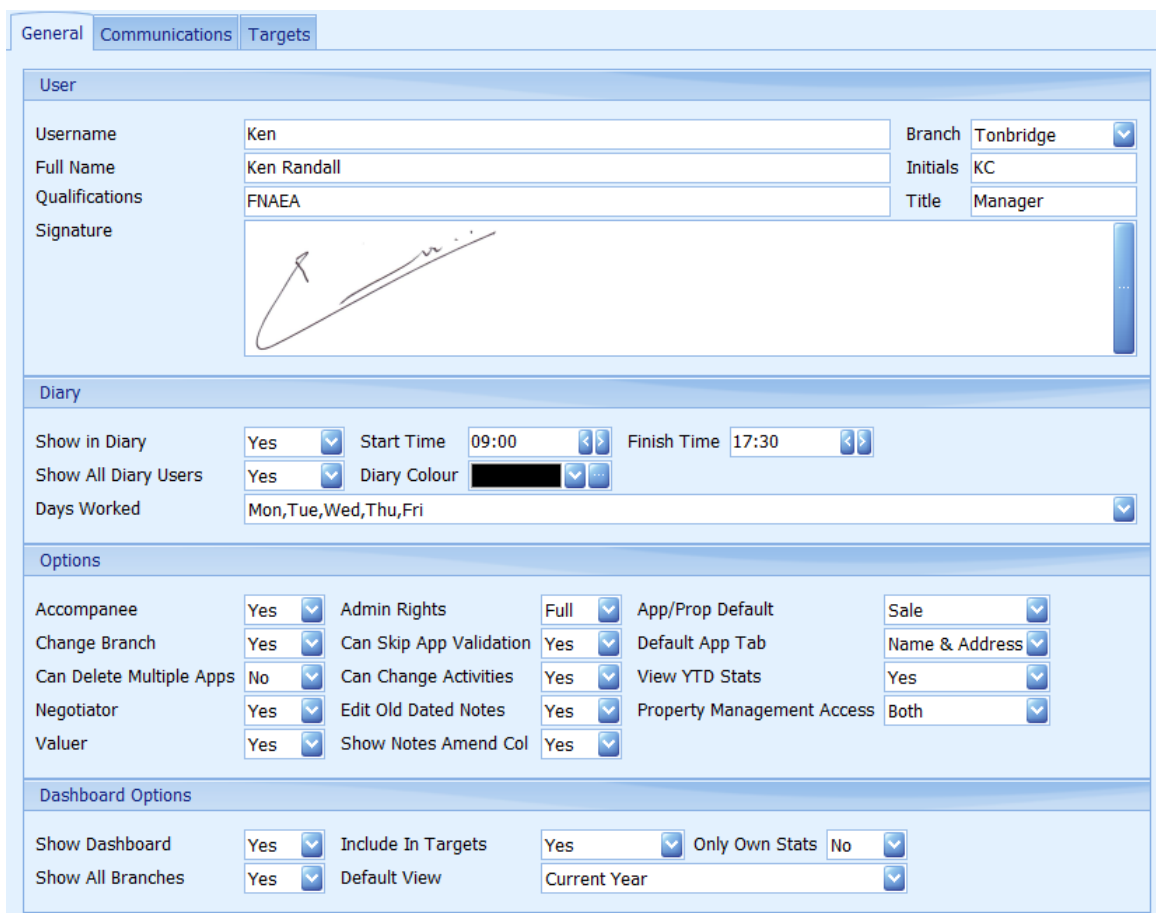
If a user forgets their login password this can be reset to blank by clicking on the  against their name.

The colour block in the right hand column is the colour defined for them in the diary. See below.

When you have finished making changes click the  button on the navigator panel to save the changes.

There are three tabs on the users screen, General, Communications and Targets.

General Tab



User

Username	This is the username that the user will use to login and that will appear in the diary and throughout Estate Agent Pro. The username should be unique within a branch.
Title	Whatever you want to use. This field can be used in standard letters.
Full name	The users full name. This field is also available in standard letters.
Initials	Enter the users initials. Should be unique.
Qualifications	The users qualifications. These can be used in standard letters.
Signature	If you wish to use individual signatures in communications these can be loaded by clicking on the ... button bar on the right of the signature. As the

	size of users signatures varies we can not give fixed sizes for it. Our suggestion is that you scan the signature in at 120 dpi (screen resolution) and crop it as tightly as possible.
--	---

Diary

Show in Diary	Whether or not to show this user in the diary.
Start Time	Normal starting time.
Finish Time	Normal finishing time.
Show All Diary Users	Whether or not to display all users when you view the diary.
Diary Colour	If the diary colour is set to 'Use Default' colours for each user will be automatically generated. If you choose to use specific colours then it is recommended that you do so for all users.
Days Worked	Select the days worked from the drop down list.

Options

Accompanee	Will appear in the list of personnel that can accompany viewings.
Negotiator	Will appear in drop down lists of negotiators.
Valuer	Set to yes if this user does property valuations.
Change Branch	If you require that properties and applicants can be added for other branches by the selected user the branches can be selected here. It is not necessary to add your own branch. It is recommended that the administration of properties and applicants is done at the owning branch however there may be certain circumstances when this option is required.
App/Prop Default	If a user is only using Estate Agent Pro for letting's or the majority of your properties are letting's then change this option to Letting's.
Admin Rights	<p>This determines if a user has access to this admin area. There are 3 settings:</p> <p>None Has no access to this area.</p> <p>Local Has access to change only those options that are limited to their branch.</p> <p>Full Has full access to this area.</p> <p>If a user is given access to this area it is mandatory that their login is password protected.</p>
Default App Tab	The default tab to show on the Left side of the Applicant and Property screens.
Can Skip App Validation	If set no validation will be done on incomplete data for an applicant.
View YTD Stats	Whether or not the user can view YTD financial statistics.
Edit Old Dated Notes	If this is set the user can change or delete historical dated notes for applicants and vendors. This defaults to false and it is recommended that this is not changed, or if it must be set, then only for the branch manager.
Show Notes Amend Col	If set dated notes on the applicant, property and purchase screens will show the last amended date/time of the note.

Dashboard Options

Show Dashboard	Whether or not to automatically display the dashboard when the user logs in.
Include in Targets	Whether or not to show this users targets in the YTD statistics. This would normally be turned off for administrative staff.
Only Own Stats	If you only want the user to see their own statistics then set this option to Yes.
Show All Branches	Whether or not to display all branches in the YTD statistics..
Default View	The default view of the dashboard chart.

Communications Tab

General
Communications
Targets

Contact Details

Email Address
ken@pairsoftwhere.com

Direct Dial Number
01892 111111 0
Mobile Number
07777 777777

TAPI Enabled
Yes
TAPI Line
Blah

Email Validation Logon Information

Username
ken@pairsoftwhere.com

Password

Authentication
Required

Notifications

Display Sent Notification
Yes
Pin Notification
Yes

Background Emails

Send in Background
No

It is highly recommended that sending of emails in the background is not set until a users can successfully send an email in the foreground. If you experience any errors sending emails please unset this option

Contact Details

Email Address	Only set if you wish to use individual emails in communications. If this is not set then the email address defined for the branch will be used in all emails.
Direct Dial Number	Enter if applicable. This can be used in standard letters.
Mobile Number	Enter if you wish to make this available in standard letters.

Email Validation Logon Information

Only complete this area if your internet provider requires validation for sending emails.

Username	Username provided by your internet provider.
Password	Password provided by your internet provider.
Authentication	Select the appropriate authentication method from the drop down list.

Notifications

Display Sent Notification	Display a notification for a few seconds when the email has been sent.
Pin Notification	Permanently display the notification until it is closed

Background Emails

Send in Background	Set accordingly. The default is off.
--------------------	--------------------------------------

Targets Tab

General
Communications
Targets

The target value to be entered is a monthly target and the weekly, quarterly and annual targets will be calculated on a pro rata basis


Target	From Date	Value
Applicants registered	01/01/2001	8
Exchanges	01/01/2001	4
Exchanges fee value (£)	01/01/2001	20,000
Fall throughs	01/01/2001	0
FS Appointments made/referred	01/01/2001	10
New Instructions	01/01/2001	5
Offers received	01/01/2001	6
Sales	01/01/2001	4
Sales fee value (£)	01/01/2001	20,000
Valuations booked	01/01/2001	7
Valuations attended	01/01/2001	6
Viewings booked	01/01/2001	20
Withdrawals	01/01/2001	0












The monthly targets for each user are entered here. These targets are then automatically set for annual, quarterly and weekly YTD statistics in the [Dashboard Screen](#) on a pro rata basis. Targets can be changed throughout the year by adding a new target and setting the from date as appropriate. From dates for all targets are initially set as 01/01/2001 and there is no harm leaving them as this date.




This is for you to classify clients however you wish but will not effect the internal category used by Estate Agent Pro.

Categories can be added by clicking on the  button on the navigation panel. Click on the  button to save changes. See [How do I use the navigation buttons?](#) for more information.

These categories must be common across all branches. Please bear in mind that, with the exception of adding new categories, when these categories are changed, the categories set for all existing clients will also need to be changed.

 **ESTATE AGENTS**

Name	Contact Record						
<div style="background-color: #e6f2ff; padding: 2px; margin-bottom: 2px;">- Company : Chappel & Co</div> <div style="background-color: #e6f2ff; padding: 2px; margin-bottom: 2px;">Chappel, P Mr</div> <div style="background-color: #e6f2ff; padding: 2px; margin-bottom: 2px;">+ Company : Jones Estate Agents</div> <div style="background-color: #e6f2ff; padding: 2px; margin-bottom: 2px;">+ Company : Pair Management Co</div> <div style="background-color: #e6f2ff; padding: 2px; margin-bottom: 2px;">+ Company : Tonbridge Estate Agents</div>	<div style="background-color: #e6f2ff; padding: 5px; min-height: 100px;"> Mr P Chappel Chappel & Co 47 Tonbridge Road Tonbridge Kent TN11 7HD </div> <table border="1" style="width: 100%; border-collapse: collapse; margin-top: 10px;"> <thead> <tr style="background-color: #e6f2ff;"> <th style="width: 50%;">Number\Email</th> <th style="width: 50%;">Detail</th> </tr> </thead> <tbody> <tr style="background-color: #e6f2ff;"> <td style="text-align: center;"> 01892 555555</td> <td></td> </tr> <tr style="background-color: #fff9c4;"> <td style="text-align: center;"> pchappel@chappelestateg</td> <td></td> </tr> </tbody> </table>	Number\Email	Detail	 01892 555555		 pchappel@chappelestateg	
Number\Email	Detail						
 01892 555555							
 pchappel@chappelestateg							
<div style="background-color: #e6f2ff; padding: 2px; border: 1px solid #003366;">4 Estate Agents</div> <div style="display: flex; justify-content: space-between; align-items: center; margin-top: 5px;">      </div>							

Estate agents can be added by clicking on the  button on the navigation panel. Click on the  button to save changes. An existing estate agent can be cloned by selecting them and then clicking on the  button. See [How do I use the navigation buttons?](#) for more information.

Estate agents can either be added as individuals or just as a company.

When adding an estate agent the [Client's Screen](#) will be displayed.

If you wish to edit existing settings click on the button on the right hand side of the contact record address.



The individual solicitor record must be selected first, even if it is blank.

 **SOLICITORS**

Name	Contact Record						
<div>Company : Badger & Partners</div> <div>Badger, J Mrs</div> <div>Roloph, Z Mrs</div> <div>+ Company : Mercantile & Rolfe</div> <div>+ Company : YYY Solicitors Ltd</div>	<div>Mrs J Badger</div> <div>Badger & Partners</div> <div>8 Holtye Road</div> <div>Tunbridge Wells</div> <div>Kent</div> <div>TN2 6AJ</div>						
	<table border="1"> <thead> <tr> <th>Number\Email</th> <th>Detail</th> </tr> </thead> <tbody> <tr> <td>01892 121212</td> <td></td> </tr> <tr> <td>jbadger@badgersolicitors.c</td> <td></td> </tr> </tbody> </table>	Number\Email	Detail	01892 121212		jbadger@badgersolicitors.c	
Number\Email	Detail						
01892 121212							
jbadger@badgersolicitors.c							

4 Solicitors

Solicitors can be added by clicking on the button on the navigation panel. Click on the button to save changes. An existing solicitor can be cloned by selecting them and then clicking on the button. See [How do I use the navigation buttons?](#) for more information.

Solicitors can either be added as individuals or just as a company.

When adding a solicitor the [Client's Screen](#) will be displayed.

If you wish to edit existing settings click on the button on the right hand side of the contact record address.



The individual solicitor record must be selected first, even if it is blank.

SURVEYORS

Name	Contact Record														
<div>Company : Apcott Surveyors</div> <div>Apcott, Mr</div>	<div>Mr John Apcott Apcott Surveyors 88 High Street Tonbridge Kent TN9 7FF</div>														
<table border="1"> <thead> <tr> <th>Number\Email</th> <th>Detail</th> </tr> </thead> <tbody> <tr> <td>01892 444555</td> <td>Office</td> </tr> <tr> <td>07787111999</td> <td>Jeff Apcott</td> </tr> <tr> <td>07787222111</td> <td>John Whitler</td> </tr> <tr> <td>sales@apcottsurveyors.co.uk</td> <td></td> </tr> <tr> <td>japcott@apcottsurveyors.co.uk</td> <td></td> </tr> <tr> <td>jwhitler@apcottsurveyors.co.uk</td> <td></td> </tr> </tbody> </table>		Number\Email	Detail	01892 444555	Office	07787111999	Jeff Apcott	07787222111	John Whitler	sales@apcottsurveyors.co.uk		japcott@apcottsurveyors.co.uk		jwhitler@apcottsurveyors.co.uk	
Number\Email	Detail														
01892 444555	Office														
07787111999	Jeff Apcott														
07787222111	John Whitler														
sales@apcottsurveyors.co.uk															
japcott@apcottsurveyors.co.uk															
jwhitler@apcottsurveyors.co.uk															

1 Surveyors

Surveyors can be added by clicking on the button on the navigation panel. Click on the button to save changes. An existing surveyor can be cloned by selecting them and then clicking on the button. See [How do I use the navigation buttons?](#) for more information.

Surveyors can either be added as individuals or just as a company.

When adding a surveyor the [Client's Screen](#) will be displayed.

If you wish to edit existing settings click on the button on the right hand side of the contact record address.







The individual solicitor record must be selected first, even if it is blank.

8.5 General Options

ADDRESSES

Towns	Counties	Countries
Default	Towns	
<input checked="" type="checkbox"/>	Tonbridge	
<input type="checkbox"/>	Tunbridge Wells	
<input type="checkbox"/>	Uckfield	



The name of towns, counties and countries in your location can be entered here. They are then selectable when inputting new addresses on the [Address Screen](#).

If one is set as the default then it will be automatically entered for any new address.

Addresses can be added by clicking on the  button on the navigation panel. Click the  button to save the changes. See [How do I use the navigation buttons?](#) for more information.

ADVANCED MATCHING

Sales	Lettings
Description	
Air Conditioning	
Annexe	
Burglar Alarm System	
Boat/Caravan (space for)	
Cellar	
Cottage Style	
Coastal Location	
Double Glazing	
Exposed Beams	
Ground Floor Toilet	
Level Walk to Amenities	
Near Schools	
Needs Some Improvement	
Needs Renovation	
No Near Neighbours	
Not on Main Road	
No Steps	

Use advanced matching ☐

Advanced matching criteria can be set for both sales and letting's individually. By default the option to use advanced matching is turned off. If it is turned on then an additional tab will be visible on both the applicants and properties screen.

Matching criteria can be added by clicking on the button on the navigation panel. Click the button to save the changes. See [How do I use the navigation buttons?](#) for more information.


We have found that advanced matching, whilst very useful in matching specific properties to specific applicants, is confusing to most users and therefore we recommend that this option is not used unless you have a specific requirement.

AUTOMATIC REVIEWS




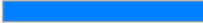



























































Automatic Reviews

- ☒ Review frequency change
- ☒ Client Review
- ☒ Progress Review
- ☒ Applicant Matches Review
- ☒ Applicant details changed
- ☒ Applicant offer added or amended
- ☒ Applicant sales chasing event entered
- ☒ Applicant viewing added or amended
- ☒ Applicant data changed
- ☒ Applicant dated note added or amended
- ☒ Applicant communication sent
- ☒ Vendor offer added or amended
- ☒ Vendor sales chasing event entered
- ☒ Vendor viewing added or amended
- ☒ Vendor asking price change
- ☒ Vendor data changed
- ☒ Vendor dated note added or amended
- ☒ Vendor communication sent

The next review date is automatically updated based on the review frequency set for the client whenever any of the actions checked are taken. By default all items are checked.


Click the  button to save the changes.

CENTRAL NOTES WHOM

No	Description	Colour
1	Vendor	  
2	Purchaser	  
3	Vend Solicitor	  
4	Purch Solicitor	  
5	General	  
6		  
7		  
8		  
9		  
10		  
11		  
12		  
13		  
14		  
15		  
16		  
17		  
18		  
19		  
20		  
21		  

The content of what is displayed in the Central Notes, Whom column, drop down, and the background colour can be defined here. The default values are shown above. Setting the colour to


black will disable the use of the background colour in central notes.

Click the  button to save the changes.

CONTACT METHODS

No	Description
1	Spoken
2	Left Message
3	Email
4	SMS
5	
6	
7	
8	
9	
10	
11	
12	
13	
14	
15	
16	
17	
18	
19	
20	
21	

The Contact Method is displayed as a column in most dated notes grid. The values can be defined here. The values shown above are the defaults.


Click the  button to save the changes.

CONTACT REASONS

No	Description
1	Client Review
2	Ring Out
3	Viewing Feedback
4	STC Progression
5	Inbound Call
6	
7	
8	
9	
10	
11	
12	
13	
14	
15	
16	
17	
18	
19	
20	
21	

The Contact Reasons is displayed as a column in most dated notes grid. The values can be defined

here. The values shown above are the defaults.

Click the  button to save the changes.

DIARY

Automatically Refresh Diary on Idle	<input type="text" value="No"/>
Check for Overlapping Viewings within 1 hour	<input checked="" type="checkbox"/>
Default Appointment Label	<input type="text" value="None"/>
Default Valuation Appointment Time	<input type="text" value="60 Minutes"/>
Default Valuation Label	<input checked="" type="checkbox"/> Travel Required
Default Viewing Appointment Time	<input type="text" value="60 Minutes"/>
Default Viewing Label	<input checked="" type="checkbox"/> Travel Required
Default Reminder	<input checked="" type="checkbox"/> 15 minutes
Show Users from All Branches	<input type="text" value="Yes"/>

[Edit Bank Holidays](#)

Historic Diary Deletion

Before Date	<input type="text" value="07/12/2014"/>	Delete
-------------	---	------------------------

The diary can be set to automatically refresh if any other user has made changes to the diary when Estate Agent Pro is idle. By default this is turned off. There is a button on the diary to reload it manually.

You can define the default labels used in the diary for appointments, valuations and viewings. These labels match those used in Microsoft Office.

The default reminder time can also be set and whether reminders are activated for new appointments by default.

By default the diary for all users in all branches is available. This can be changed so that only those users in your branch can be seen.

UK bank holidays are provided for the next 10 years. These can be edited by clicking on the Edit Bank Holidays button.

When the diary becomes very large this impacts performance so there is an option to delete old diary entries.

OPTIONS

AFD Postcode Lookup County	Default
AML Mandatory Check	Yes
Automatically Set Review Date	Yes
Applicant/Vendor - Default Review Frequency	2 Weeks
Applicant/Vendor - Validate DPA (Data Protection Act)	Yes
Applicant/Vendor - Validate Mortgage Required	Yes
Applicant/Vendor - Validate Response Monitoring	Yes
Client - Validate Preferred Contact Time	Yes
Dated Notes Reason/Method Mandatory	Yes
Disable Review Presets	No
Record change of Negotiator as an Event	Yes
Spell Checking	Yes
Telephony Interface (TAPI) Enabled	No
TAPI Dial Prefix	
Viewings - Show negotiator who made booking column	Yes

AFD Postcode Lookup County	When using AFD Postcode or PostcodePlus the county to be selected can be specified. Options are Administrative, Postal, Traditional or Default. Default means use the postal county and, if it is blank, use the traditional county instead.
AML Mandatory Check	If this option is selected then the Opens the Advanced Money Laundering (AML) Screen will have to be completed before a property can be set to Sale/Let Agreed.
Automatically Set Review Date ¹	EAP automatically sets the next review date when certain actions are taken e.g. amending the asking price, sending an email, etc. This can be disabled here.
Applicant/Vendor - Default Review Frequency	The default review frequency you wish to use for applicants and vendors. It is recommended that this not be set to longer than every 2 weeks.
Applicant/Vendor - Validate DPA	If these options are selected then the setting of these fields will be mandatory on the applicant/vendor screens.
Applicant/Vendor - Validate Mortgage Required	
Applicant Vendor - Validate Response Monitoring	
Client - Validate Preferred Contact Time	If you don't want to use preferred contact times, the validation of them when any telephone numbers, etc. are added to clients can be turned off here.
Disable Review Presets	If this option is selected then the preset, 1 day, 1 week & 1 month buttons will be disabled forcing users to set a review date.

Record change of Negotiator as an Event	It has been found that if a negotiator leaves, quite often other negotiators will assign their properties to themselves. Setting this option will record those changes in the events table so that you can be aware of them.
Spell Checking	Certain fields automatically have spell checking enabled. This can be turned off here.
Telephony Interface (TAPI) Enabled	This enables the Microsoft Telephony API (TAPI). Once enabled it can be set on a per user basis. This allows calls to be made by EAP and to indicate who the caller is and display applicable applicants/properties. Your telephone system must be Windows TAPI compliant in order for this to be used.
TAPI Dial Prefix	Only applicable when using the TAPI Interface, this would normally be a 9 to obtain an outside line but is dependent on which system you are using.
Viewings - Show negotiator who made booking column	Turn this on if you wish to record who made the appointment. By default the person who added the viewing is selected.

¹ A full list of when the review dates are automatically updated can be found in [Frequently Asked Questions](#).

Other Branches

Applicants/Properties - Archive
Yes

'Review' Other Branches
Yes

Other Branches

Applicants/Properties - Archive	If set to 'Yes' then you can archive another branches applicants/properties. The default is 'No'.
'Review' Other Branches	If set to 'Yes' then you can review other branches Clients, Progress and Viewings. The default is 'No'.

REPORTS


Include Property Reference in Advertising Reports
☐

Show Price and Address on Photograph (A4 Landscape) Report
☒

Report Banner Colour

Summary Report Title

TONBRIDGE ESTATE AGENTS - PROPERTY LIST


Include Property Reference in Advertising Reports	If this option is ticked then the internal property reference will be included in property reports. You may find this handy so that enquirers can quote the reference to you. This is turned off by default.
Show Price and Address on Photograph Report	If set the photograph standard report on the Report Generator Screen will show the property asking price and address in the bottom right hand corner.
Report Banner Colour	This colour will be used in the generation of all reports and, in conjunction with the report banner image defined in the Company Options , allows you to customise the look of reports. Standard colours can be selected from the drop down list. Custom colours can be created by clicking on the  button.
Summary Report Title	The title set here will be used on the front page of the summary standard report on the Report Generator Screen .

RESPONSE MONITORING

No	Description
1	Unknown
2	Advertising
3	Client Recommended
4	Internet - Own
5	Internet - Rightmove
6	Friday Ad
7	Previous Client
8	Adscene
9	Response to mail out
10	Walked in/Window
11	Thanet Gazette
12	Solicitor/Probate
13	Valuation
14	Sale Board
15	

Up to 31 entries can be made here. These must be common across all branches and minimal changes should be made to used items. These items are used on the [Client's Screen](#) for applicants and vendors and are so that you can report on where your business is coming from.

Response monitoring reports can be run from the [Report Generator Screen](#).


Click the  button on the navigator panel to save changes. Moving to another row will automatically save changes.

STANDARD LETTERS

Email Website Links			
Class	Type <input type="button" value="v"/>		
On Value	House <input type="button" value="v"/>	Go to	<input "="" type="text" value="http://www.myfirstsite.com/details.php?id="/>
On Value	Bungalow <input type="button" value="v"/>	Go to	<input "="" type="text" value="http://www.mysecondsite.com/details.php?id="/>
On Value	*** Any *** <input type="button" value="v"/>	Go to	<input type="text"/>

Default Page Settings			
Font	<input type="button" value="T"/> Arial <input type="button" value="v"/>	Size	11 <input type="button" value="←"/> <input type="button" value="→"/>
		Justification	Full <input type="button" value="v"/>
<div>Margins</div>			
Top	2.000 <input type="button" value="v"/>	Bottom	0.750 <input type="button" value="v"/>
Left	1.000 <input type="button" value="v"/>	Right	0.500 <input type="button" value="v"/>



Edit Standard Letters		
<input type="button" value="Applicant"/>	<input type="button" value="Vendor"/>	<input type="button" value="Marketing"/>

Email Website Links	Up to three links can be specified depending on the settings here and can be specified for any property classification. If we have designed your website there will be a standard page available for each property to send a hyperlink of that property in mail-merged letters. This is typically used in applicant letters from the Applicant/Property Matching Screen .
Default Page Settings	These are the default settings that will be used for new letters.
Edit Standard Letters	<p>There are three different types of letters. Applicants, vendors and marketing. The creation and use of them is the same. See How do I create a standard letter? for more information.</p> <p> Descriptions that start with the word Offer will be for use in the Offers Screen. Descriptions that start with the word Viewing will be specifically for use in the Viewings Screen. This only applies to applicant and vendor letters.</p>

STANDARD PHRASES

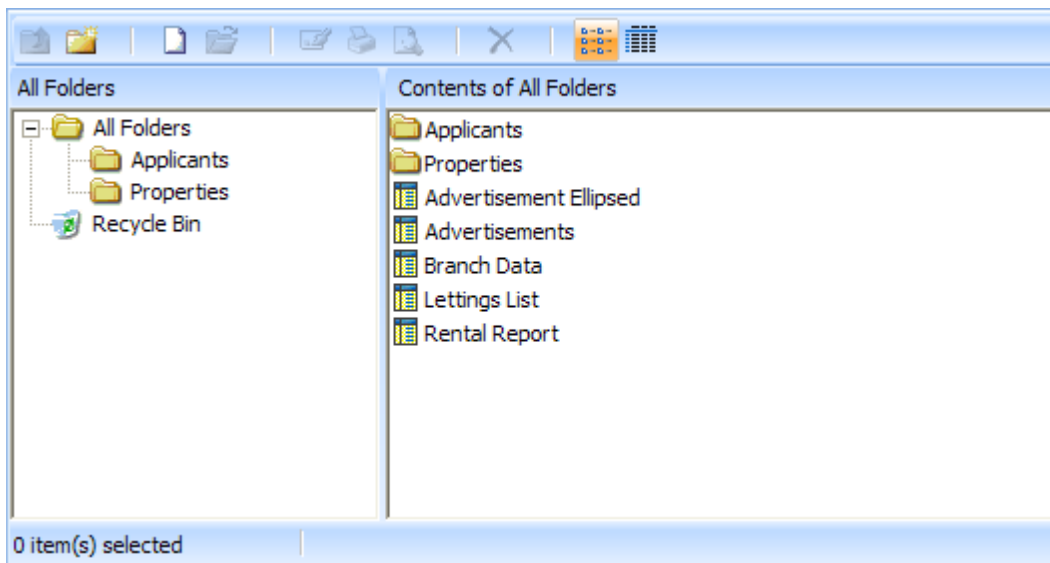
Name	Phrase
TWells Location	The delightful Georgian Spa town still retains much of its original history and charm yet provides a wide range of amenities including the Royal Victoria Place shopping mall and pedestrianised precinct, supermarkets, theatres, library, museum and art gallery and a jazz bar playing live music. There are excellent schools in the area, both state and independent, for children of all ages. The main line railway station provides commuter services to London in about 55 minutes minimum and the A21 is just 3 miles distant providing links to the M25 motorway network giving easy access to Gatwick and Heathrow airports and the Channel Tunnel.

Standard phrases can be inserted into any communication. Any number can be defined here and are designed to cut down on repetitive typing.

Standard phrases can be added by clicking on the  button on the navigation panel. Click the  button to save the changes. See [How do I use the navigation buttons?](#) for more information.

8.6 Modules Options

CUSTOM REPORTS



Custom reports can be created and edited here. See [How do I create a custom report?](#) for more information.

Reports placed in the Properties folder can be generated from the Custom Reports section of the [Report Generator Screen](#). Reports placed in the Applicants folder can be generated from the Custom Reports section of the [Applicant Search Tab](#) on the Report Generator Screen.

FINANCIAL SERVICES

Mortgage Referral Email Address

Mortgage Non-Referral Email Address

Please note that if the referred email address is not filled in then it will be as if the FS Module is not activated. If the Non-Referral Email Address is not filled in then only referred emails will be sent. If the FS Module is activated then the following fields are mandatory:

Mortgage Required, Referral Made, Initials and Reason for Non-Referral (if Referral not made)
 Applicant: Title, Initials, Surname, Home Telephone, Registration Date, Status, Purchase/Rent and Maximum Price to Pay.

Include Rentals

If the Financial Services module is enabled (full EAP Enterprise only) this screen will be available. This module sends emails either internally or externally to the specified address depending on


whether the mortgage referral check box is ticked for an applicant or vendor. GDPR permission must also be given. Cancellation, Feedback, Outcome and Non-Referral definitions can be defined here. Feedback and Outcome definitions can have a default set which is applied after the referral email is sent. Non-Referrals can be set to be excluded from the Non-Referrals report e.g. Cash Buyers.

SYNCHRONISATION

FTP Authorisation		Branch	Accept
Username	PSW1000001	▶ Tunbridge Wells	No
Password	uckfield	Crowborough	No
Test FTP		Sevenoaks	No
		Brighton	No
		Keymer Road	Yes
Re-Synchronise (only when instructed by Technical Support)			
<input type="text"/> <input type="button" value="Re-Sync"/>			
Web/Portal			
ID	0		
Name	Our Website		

We will provide you with a username and password to enter here. If you do not want to receive data from a particular branch the Accept should be set to 'No' for that branch.

Click on the button to test that you can communicate with the synchronisation server.

Click the  button on the navigation panel to save the changes. See [How do I use the navigation buttons?](#) for more information.

Under certain circumstances you may be asked to re-synchronise specific tables from the drop down list. Click the button to post the data.

The Web/Portal settings should not normally be changed.

TEXT

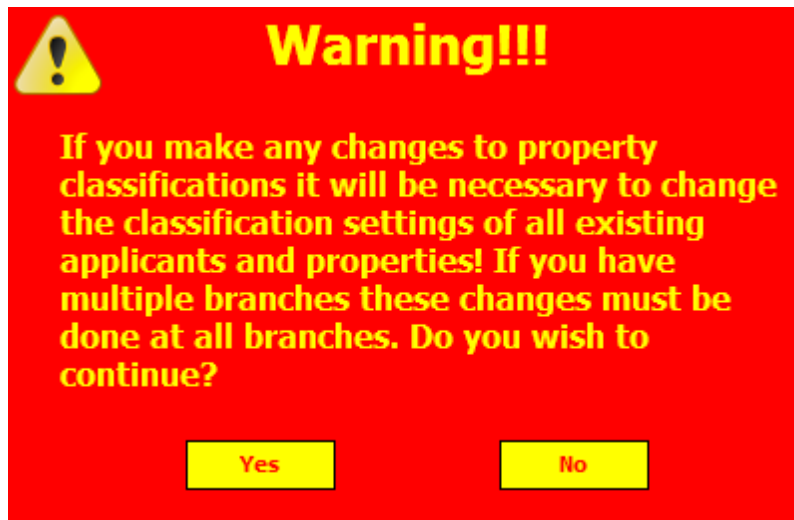
Username	TEA
Password	ht23GR7f
Reply Number (eg 447871840199)	447872840137
Server Name	sms.isslservices.co.uk

If you are using the SMS text messaging facility we will provide you with the information to enter here (additional charges apply).

8.7 Property/Vendor Options

CLASSIFICATIONS

The correct definition and usage of classifications is critical to the use of Estate Agent Pro therefore, when this screen is accessed the following warning is always displayed.




Please be very careful when changing classifications.

ID	Classification Name	A to Z
1	Type	<input type="checkbox"/>
2	Style	<input checked="" type="checkbox"/>
3	Age	<input type="checkbox"/>
4	Garden	<input type="checkbox"/>
5	Location	<input type="checkbox"/>
6	Area	<input type="checkbox"/>
7	Garaging	<input type="checkbox"/>

Up to ten classifications can be defined for properties. These must be common across all branches. Once defined the input of them is mandatory for all properties with a sale status of available or above and for all applicants. Please bear in mind that when these classifications are changed, the classifications set for all existing applicants will also need to be changed.


Clicking on any classification name will display the entries for that classification. If you wish the classifications to be sorted when they are displayed tick the A to Z check box.

Classifications can be added by clicking on the  button on the navigation panel. See [How do I use the navigation buttons?](#) for more information.

No	Description
1	House
2	Bungalow
3	Maisonette
4	Flat
5	
6	
7	
8	
9	
10	
11	

Up to 31 entries can be defined for each classification.

If the **Default** check box is ticked for any entry, new applicants will automatically have the corresponding entry ticked.

When you have finished making changes click the  button on the navigator panel to save the changes.

FORCE REFRESH

Live

Property List



Ref	Last Amended	Name/Address
CRO0001043	04/07/2005 11:47:02	1 CHERRY CLOSE,TONBRIDGE,KENT,TN10
CRO0001278	13/04/2006 13:34:48	1 ETHELRED GARDENS,TONBRIDGE,KENT
CRO0002123	09/02/2006 15:51:53	1 LONSDALE AVENUE,TONBRIDGE,KENT
CRO0001171	10/04/2006 16:12:14	1 ST PATRICKS MEWS,TONBRIDGE,KENT
CRO0002027	21/01/2006 09:42:53	1 THE SPIRAL,TONBRIDGE,KENT,TN11 9D
CRO0002134	13/02/2006 17:26:57	1 WILLOW CLOSE,TUNBRIDGE WELLS,KE
CRO0001942	12/04/2006 13:33:53	11 CRUCKSHANK WAY,TUNBRIDGE WELL
CRO0000888	29/03/2006 13:45:07	11 POPULAR CLOSE,TONBRIDGE,KENT,TN
CRO0002064	07/04/2006 11:23:16	12 BUCKLANDS DRIVE,TONBRIDGE,KENT
CRO0002577	27/03/2006 10:49:40	12 DARK SQUARE,TUNBRIDGE WELLS,KE
CRO0001435	31/03/2006 17:27:24	12 GREEN ROAD,TONBRIDGE,KENT,TN9 1
CRO0002693	13/04/2006 12:22:26	12 ROWLANDS ROAD,TUNBRIDGE WELLS
CRO0002353	13/04/2006 17:32:32	12 UPLANDS WALK,TONBRIDGE,KENT,TN
CRO0001990	13/04/2006 13:40:21	13 CEDAR CLOSE,TUNBRIDGE WELLS,KE
CRO0000979	16/03/2006 16:02:09	13 PEARL ROAD,TONBRIDGE,KENT,TN10
CRO0000993	28/03/2006 14:02:24	14 AVENUE GARDENS,TONBRIDGE,KENT
CRO0000467	05/04/2006 10:17:12	14 ESSEX ROAD,TONBRIDGE,KENT,TN9 2
CRO0001556	04/04/2006 15:25:41	14 RIDGEWAY ROAD,TUNBRIDGE WELLS

49 Records

Refresh List

Ref	Name/Address
CRO0001783	1 BLANDS DRIVE,TONBRIDGE,KENT,TN9 2

1 Records

If you are advised by technical support to refresh (re-synchronise) a property this is where it can be done. Either click on the property in the property list or use the progressive search facility to locate it and then click on the  button. As many properties can be refreshed as required but please do not refresh properties unnecessarily. Properties can be removed from the refresh list by clicking on it and then clicking on the  button.



Properties can also be dragged and dropped between the two lists.

To process the properties to be refreshed click on the  button. Unless the synchronisation


process is busy with a large upload or download all data connected with these properties will be refreshed to all branches and your website in the background within a few minutes or so. There is no need to keep this screen open.

MARKETING EXPENSES

No	Description	
1	HIPS Preparation	
2	Property Particulars	
3	Advertising	
4		
5		
6		
7		
8		
9		

Up to 31 entries can be defined. These are used on the [Marketing Expenses Tab](#) of the [Vendors Tab](#) on the [Properties Screen](#).

Significant changes should not be made to existing items unless they have not been used.

Click the  button on the navigator panel to save changes. Moving to another row will automatically save changes.

OPTIONS

Automatically Capitalise Property Fields	Yes	
Automatically Change Status to 'Under Offer'	Yes	
Automatically Insert Metric Measurements	Yes	
Default Price Details	OFFERS INVITED IN THE REGION OF	
Display Key Features	Yes	
Include House Name/Number in EPC Certs	Yes	
Maximum Characters Allowed in Advert Text	255	
Portals/Website Configured to Upload to	Our Website,RightMove,TheGuildProperty,Zoopla,allagents ltd,mobiagent,onthemarket.com,ukhomesearch.co.uk	
Review when Archived by Default	No	
Restrict Withdrawal Date Access	Yes	
Show HIPS on Property Screen	No	
Show Missing Advert & Portal Text Warning	Yes	
Validate Classifications	Yes	
Validate Postcode	Yes	
Valuation Template - Print Floorplan	Yes	
Vendor Report	Ads,Comms,Matches,Offers,Partics,Price,Purch,Status,Value,Vend,Views	
Web Enabled by Default	Yes	

Automatically Capitalise Property Fields	New paragraphs are automatically capitalised if this option is set. The fields affected on the Properties Screen are the summary and full details, the accommodation details, the bullet points and the directions and additional information fields.
Automatically Change Status to	If set, when an offer is accepted the property status will be


"Under Offer"	automatically updated.
Automatically Insert Metric Measurements	If this option is set when imperial measurements are inserted e.g. 15'10" on the fields listed above, the metric equivalent will automatically be appended so that it becomes 15'10" (4.83m). There should be no spaces in the measurement.
Default Price Details	The price details field for new properties will be set to what is entered here see How do I use price qualifiers (POA,OIRO. etc...)? for more information.
Display Key Features	The Key Features Tab on the Advertising Tab of the Properties Screen can be hidden if not required.
Include House Name/Number in EPC Certs	Includes house name/number in the generation of EC certificates when set.
Maximum Characters Allowed in Advert Text	The Advertising & Portal Text field can have the maximum number of characters allowed to be entered set. This defaults to 255. The reason for this is that it is used in advertising and other reports and is also send to portals. If this text is too large it will be truncated. See the Properties Screen Advertising Tab for details on how to specify the uploads.
Portals/Website Configured to Upload to	You only have to configure this drop down check box if you want to be able to specify that certain properties are not uploaded to all portals or your own website (if hosted by us). Please note that ticking portals that we have not configured uploads for you will have no effect.
Review when Archived by Default	When set will automatically set properties for review when archived.
Restrict Withdrawal Date Access	When set, and the property is set as withdrawn, if the user does not have full administrative access, the date will be set to the current date and will not be able to be changed.
Show HIPS on Property Screen	If Home Information Packs are ever resurrected the relevant information can be displayed on the property screen by setting this option to 'Yes'.
Show Missing Advert & Portal Text Warning	When this text is missing a warning is flagged in property screen. Turn this option off if you do not wish this to be displayed.
Validate Classifications	Set this option to 'No' to stop validation of classifications in the applicants and properties screen. It is strongly recommended that this option is left set as 'Yes'.
Validate Postcode	Set this option to 'No' to stop validation of postcodes throughout the system. It is strongly recommended that this option is left set as 'Yes'. The only reason for turning this off would be if you are located outside of the UK.
Valuation Template - Print Floorplan	Set this option to 'Yes' if you want blank floorplan templates printed when you print a valuation template.
Vendor Report	Vendor Report is a mail merge field that can be included in vendor standard letters. This field will include events posted against the vendor and the event types to be included are controlled here.

Web Enabled by Default

If you do not want properties web enabled by default e.g. not to appear on your website or portals when available, under offer or sale agreed then set this option to 'No'. In this case you will have to enable the properties individually.

SALES CHASING DEFINITIONS

Sales		Lettings	
Class 01	Paid searches to Solicitor	Both	▼
Class 02	Solicitor applied for deeds	Vendor	▼
Class 03	Filled in mortgage forms	Both	▼
Class 04	Paid survey fee	Both	▼
Class 05	Filled in fixtures forms	Vendor	▼
Class 06	Solicitor sent out contract	Vendor	▼
Class 07	Received sellers contract	Both	▼
Class 08	Local searches applied for	Both	▼
Class 09	Employee's reference received	Both	▼
Class 10	Credit references done	Both	▼
Class 11	Local searches in	Both	▼
Class 12	Survey done	Both	▼
Class 13	Received mortgage offer	Both	▼
Class 14	Booked for signing	Both	▼
Class 15	Purchaser aware deposit rules	Purchaser	▼
Class 16	Signed Contract	Both	▼
Class 17			▼
Class 18			▼
Class 19			▼
Class 20			▼
Class 21			▼
Class 22			▼
Class 23			▼
Class 24			▼
Class 25			▼
Class 26			▼
Class 27			▼
Class 28			▼
Class 29			▼
Class 30			▼
Class 31			▼


 Save

Sales Chasing definitions can be defined separately for sales and letting's.

Up to 31 entries can be defined. These are used on the [Sales Chasing Tab](#) of the [Sales/Rent Status Screen](#).


Significant changes should not be made to existing items unless they have not been used.

The drop down box can be set as applicant, vendor or both and will be visible or not on the sales chasing tab accordingly.

Once all changes are made click on the  button to save them.

STATUS COLOURS

Valuation	<input type="text" value="Yellow"/>	▼	...
Not Released	<input type="text" value="Orange"/>	▼	...
Available	<input type="text" value="Green"/>	▼	...
Available Again	<input type="text" value="Dark Green"/>	▼	...
Under Offer	<input type="text" value="Red"/>	▼	...
Sale Agreed	<input type="text" value="Purple"/>	▼	...
Exchanged	<input type="text" value="Cyan"/>	▼	...
Completed	<input type="text" value="Magenta"/>	▼	...
Completed (Paid)	<input type="text" value="Pink"/>	▼	...
Withdrawn	<input type="text" value="Grey"/>	▼	...

You can define the colours you wish to be associated with each property status. Standard colours can be selected from the drop down list. Custom colours can be created by clicking on the  button.

TEMPLATES & DOCUMENTS

Word Templates

New

Edit

Delete

Template Name

URL Path for Online Documents

Brochure

Floorplan

Virtual Tour

Word templates can be created, edited or imported. Microsoft Word is no longer used to edit or generate templates.

See [How do I create a Word template?](#) for further information on Word templates.

The URL Path for Online Documents is the default link to be used if you wish online documents to be used in upload to portals. Only portals that use the Rightmove upload specification support this.

PROPERTY/VENDOR REVIEW

Include these Statuses in Vendor Review

- ☒ Valuation
- ☒ Available/To Let
- ☒ Under Offer
- ☒ Sale Agreed/Under Application
- ☒ Exchanged/Let
- ☒ Completed
- ☒ Withdrawn
- ☒ Not Released

Include these Statuses in Property Review

- ☐ Valuation
- ☐ Available/To Let
- ☒ Under Offer
- ☒ Sale Agreed/Under Application
- ☒ Exchanged/Let
- ☒ Completed
- ☐ Withdrawn
- ☐ Not Released

If you don't want vendors or properties as applicable to be reviewed when their properties are at a certain status the applicable status can be unchecked here.

8.8 System Options

OPTIONS

Mail Server

This will either be the smtp server details provided by your internet provider or the address of your Microsoft Exchange Server.

UPGRADE EAP

If you click the "Upgrade" button with an invalid code the software will no longer function. If contacting support please quote the following ID:

F47FA179

Enter Code

Upgrade

This is where the licensing information in connection with Estate Agent Pro is entered.

When instructed to do so by technical support a new release code can be entered here.

If an incorrect release code is entered, Estate Agent Pro cannot be used.

ESTATE AGENT PRO

Part



IX

Troubleshooting

9 Troubleshooting

I WANT TO SEND YOU AN IMAGE OF MY SCREEN, HOW DO I DO THIS?

To capture/copy a screen image to the clipboard when using windows, you can press either Ctrl +Print Scrn to capture the entire screen or Alt+Print scrn to capture the current window. You can then paste this image into a word document and send it to us as a file.

WHY CAN'T I SEE MY IMAGES WHEN I PLUG MY NEW CAMERA IN?

EAP will have been set up to look for images in the folder used by your previous camera. If the new camera is using a different folder, your system administrator will need to reset EAP to use it also.

WHY IS THE COMPANY INFORMATION SCREEN ASKING FOR A POSTCODE?

If you are running an install of EAP, after entering the release code a screen will come up where you have to enter your company details.

The address field should be a minimum of four lines and the last line must be a full valid post code.



Postcode letters must be capitals and make sure you have not accidentally entered a blank line or space after the postcode. Also, make sure that a capital letter O has not been used where a zero 0 should be and vice versa.

WHY CAN'T I SEND EMAILS?

First, please ensure that you have an internet connection. If this is okay then please contact your system administrator and ask them to check that the correct authorisation settings are set.

WHY IS EAP DISPLAYING A \$ SIGN IN CURRENCY FIELDS?

EAP does not have its own currency setting, like most applications it relies on picking up the currency from the Windows operating system. Please can you check that the 'Regional settings' are correct on your computer.

Note that if you are on a Windows 7 machine, there is a known Microsoft bug that causes issues with applications written in Delphi such as EAP. It seems that if the correct 'Locale' info is selected during the Windows installation, even though it will then show correctly on the regional settings screen, the Windows operating system returns the wrong information when a Delphi program requests it.

To correct this please try the following:

In the Windows Control panel:

Change the "Format" setting to "English (USA)",
Click [OK].

Restart your computer

Change the "Format" setting to "English (United Kingdom)",
Click [OK].

Restart your computer

ERROR WHEN GENERATING A WORD TEMPLATE

There are several issues that can cause an error when generating a word template, how they are dealt with will depend on the message Microsoft Word displays.

If it is an 'Access violation' message, the first thing to check is that Microsoft Word is installed on the computer. If it is installed, try closing down the machine, then after restarting it, go directly into Microsoft Word and check that the 'User name' and 'Initials' are set. This is a known issue with Microsoft Word 2007, to find the settings follow the path, Word > Office Button > Word Options > Popular.

If the message is something along the lines of 'Word cannot create document 'c:\doc....\templatename.doc'', it will be due to a previous version of the file being locked. The simplest way to resolve this is to restart your computer.

If the message is 'Word cannot start the converter mswrd632' this is due to a Microsoft Windows registry setting, so should be dealt with by your IT engineer. If they need advice on this get them to contact [Technical Support](#).

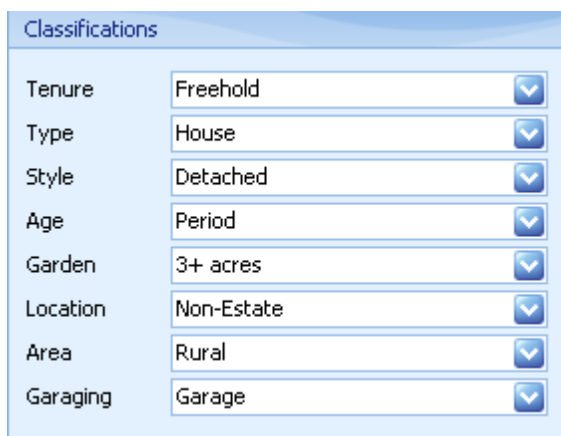
WHY IS MY APPLICANT NOT MATCHING ANY PROPERTIES OR VICE VERSA?

In the case of an Applicant, the first thing to check is that 'Yes' is selected in the following panel on the [Applicants Screen](#):



Matching	
Include in	Yes ▼
Send Texts	Yes ▼

If a property ensure there is an entry for each Classification on the [Properties Screen](#):



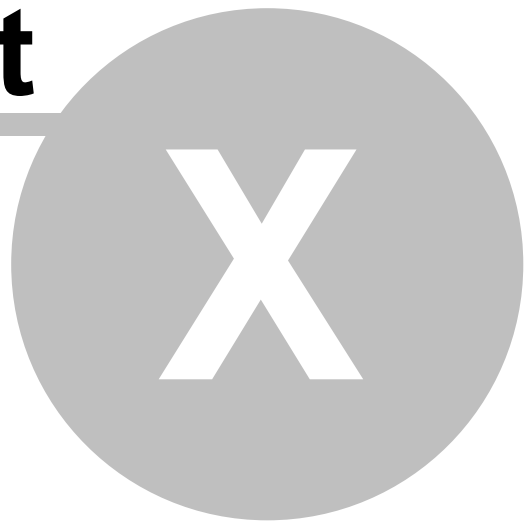
Classifications	
Tenure	Freehold ▼
Type	House ▼
Style	Detached ▼
Age	Period ▼
Garden	3+ acres ▼
Location	Non-Estate ▼
Area	Rural ▼
Garaging	Garage ▼

and that the sale status is Available, Under Offer, Sale Agreed or the Letting equivalent.

If these are set correctly, then the reason will be a mismatch between the applicant's criteria and the criteria of the property. To check this make a careful note of the applicants criteria, then use the Property search in the [Report Generator Screen](#) to filter the results by adding more and more of the applicants criteria until the property disappears from the list of matches.

ESTATE AGENT PRO

Part



What's New

10 What's New

10.1 Recent Changes



Please note that specific versions may not be released but will instead be rolled into the next release.

- 3.5.1.129
 - New Edge version of Google Maps is now used. The necessary Microsoft Edge2 DLL's are provided.
 - Invalid characters in the document name of Property Particulars is now trapped when saving the document.
 - In the Property screen the Tax Band can be set as "New Home" indicating that it is unknown.
- 3.5.1.128
 - Further changes for using Microsoft Word 365 remotely.
- 3.5.1.127
 - Additional code added to try to resolve why Property Particulars cannot be generated in Microsoft Word 365 when running EAP remotely.
- 3.5.1.126
 - The mapping column has been added back into the Property Classifications screen in Admin. It is not necessary to map property types, styles, etc. if you are populating the Rightmove classification drop-down box on the property screen.
 - Not Released properties can only be set to Available unless done by an Admin user.
 - Fixed issue when matching applicants from the Property Screen and selecting to match only those applicants that you are set as the negotiator.
- 3.5.1.125
 - Trapped error in Sales Pipeline when a property does not have a sale agreed price set.
 - Fixed issue with appointments not always being written to the diary.
 - Tentative and provisional accompanied viewings are now entered into the diary.
 - Solicitors Instructed button has been added to the Modules section of the main form. This will include all non-archived properties and applicants. This option is only available for EAP Enterprise and Destiny. There is also an option in Reports>Generate Whole Database Reports to do it for just properties or applicants respectively. It is also available as a standard report on the Properties tab. When used from here it will include all filtered properties that have a solicitor assigned.
 - If there is an error opening MS Word when generating templates the EAP message displayed now includes the error returned by MS Word.
- 3.5.1.124
 - Fixed issue with changes to viewings not always updating the diary.
- 3.5.1.123
 - Fixed issue introduced in previous version with #Users error a reserved table name being displayed when the Client Review form was displayed.
- 3.5.1.122
 - YTD Statistics now includes applicant registrations.
 - Fixed issue when the date of the viewing in the Viewing screen was changed, the old appointment was not being removed from the diary.
 - Fixed issue with the Inc Archived properties button not working in Reports>Generate.
- 3.5.1.121
 - Changed internal dialog used when exporting any file.
 - Fixed issue in Sales/Lettings Status screen where Pipeline (Sales Chasing) date is not saved when it is cleared.
 - Pipeline (Sales Chasing) dates are now cleared when a property falls through.
 - Fixed issue introduced in version 3.5.1.118 where editing users in Admin became read-only.

- In Admin>Options the left hand side menu can now be collapsed.
- 3.5.1.120
 - Fixed issue in Reports>Generating>Properties Search tab in that sorting had been accidentally switched of in the previous version.
 - Fixed issue with Mortgage Referrals screen not being able to view the associated property.
- 3.5.1.119
 - Pop-up windows have been reverted to being rectangular to avoid the Invalid operation in GDI+ (Code: 1) error.
 - Internal changes in applicants screen to speed up the opening in certain circumstances. The number of live (non-archived) applicants has a direct bearing on this so it is important that applicants are archived when no longer looking for a property.
 - The advanced filter in Reports>Generator>Properties tab now has access to Pipeline (Sales Chasing) dates. These are only available for non-archived properties.
 - Additional columns can now be made visible in Reports>Generator via the Column Visibility button. This applies to both tabs. Reopening the screen reverts to the default setting.
- 3.5.1.118
 - In Admin>Options>Company>Users the user list is now sorted alphabetically.
 - When a roaming user adds a property or applicant they are prompted as to which branch this is for.
- 3.5.1.117
 - In the property screen, the match button is now disabled unless the property status is available, available again, under offer or sale agreed. If you attempt to match a sale agreed property then confirmation will be required.
 - When changing skins the name of the skin is now displayed and the current skin is selected.
 - Added an option to set a user as roaming. This is only enabled for companies that have multiple branches, and should only be used if the user moves between them. When used this will set all activities as done by the property/applicant branch, rather than the user branch.
 - Available properties can only be reverted to Valuation or Not Released by an admin user.
 - Hopefully fixed error Invalid operation in GDI+ (Code: 1) when certain skins are used, if not more information is provided in the error message to be able to track it down.
- 3.5.1.116
 - In the Sales/Lettings Status screen, when the property status had previously been set to sale agreed, the property status cannot now be set to any status less than sale agreed without setting the fall-through date first. Previously it was only checked if the status was changed to available/available again.
 - As providing council tax band and tenure are now a legal requirement, these fields have been added to the Sales/Lettings Status screen. When the property status is changed to one that would be uploadable, they are checked and an error message is displayed if they are not entered.
- 3.5.1.115
 - There is now a setting in Admin>Options>Property/Vendor>Options to set "Use Word for Property Templates". When this is set to "No" an internal editor is used in place of Microsoft Word.
 - The Viewings screen now has a button to force update/delete the viewing entry in the diary.
 - The Force Refresh screen in Admin can now be searched.
 - Fixed intermittent error when refreshing properties in that the list displayed could wrongly be applicants.
 - When automatically posting a viewing to the diary any error was trapped, but not reported. This has been changed.

- Fixed issue which occurred sometimes when trying to view sent letters.
 - Fixed intermittent problem when importing documents/files.
 - Fixed issue when clicking on the "Colour" button in the image editor.
 - Fixed issue with Google Maps not displaying. This was because they retired the version we were using. Please note that support for the version will end completely in August 2022. Before then we will switch to a new version but this will require additional Windows dll's to be installed.
 - Fixed issue in Mortgage Referrals report where incorrect exclusions were being applied in non-referrals.
- 3.5.1.114
- Fixed issue when double clicking on an applicant in the Reports>Generate>Applicant Search tab it was always displaying the first applicant instead of the one double clicked on.
- 3.5.1.113
- The dialog that shows all warning/information/confirmation messages now has a scroll bar if the message is too large to fit. The size of the dialog can also be increased by means of the size grip.
 - Fixed issue where Sales Chasing tab was displaying sales chasing descriptions for rental properties.
 - Error logs and spell-checking dictionaries are now in their own sub-folders. Users need full access to these folders but only read access to the main EAP folder.
 - Fixed problem adding vendor documents.
- 3.5.1.112
- Fixed error when opening Applicant List report from Reports>Generate>Applicant Search tab.
 - Fixed problem with no results being displayed when doing an email search from main screen.
 - Fixed problem in Mortgage Referrals>Non-Referrals where reason for non-referral could be displayed incorrectly.
 - When adding users a check is done that the username and initials are unique.
 - When opening EAP the main screen is now shown behind the login screen and the login screen is centered in it.
- 3.5.1.111
- After logging in, a screen is now displayed showing the progress of initialising EAP.
- 3.5.1.110
- Boomin update mechanism has been changed to use their live update so postings will now be made immediately after receiving an upload via the EAP synchronisation service.
 - Fixed issue of unused property classifications being displayed in Reports>Generator>Properties>Advanced Search.
 - Fixed issue of when ticking/un-ticking the check box in Reports>Generator>Applicants the wrong applicant was displayed on the screen.
- 3.5.1.109
- Archived applicants can now be restored by a user from any branch.
 - Fixed error when printing applicant card.
 - Fixed intermittent error when closing property screen.
- 3.5.1.108
- Fixed issue when sending an email from the Property Communications screen incorrect emails could be shown in the To box if the applicant is set as buying/renting another property as well.
 - Fixed error when saving N/A value in Chain Milestones.
- 3.5.1.107
- Fixed issues introduced in version 3.5.1.106:
 - Same property was appearing multiple times in the Property Review.
 - Matching from the Applicants screen throwing an exception when advanced search criteria was selected.
 - Opening the Property screen Valuation template was throwing an exception.

- Opening the chain from the Sales screen would sometimes throw an exception.
 - Clearing or setting all classifications in the Property/Applicant Filter screen would throw an exception.
 - Error validating classifications when saving an applicant.
- 3.5.1.106
- All classifications can now have an unlimited number of items in them. Previously it was limited to 31. As well as property classifications this includes applicant classifications, vendor classifications, status, response monitoring, financial services, sales chasing, search criteria and advanced search. This sounds simple but it is a major structural change to the database that affects a lot of screens such as Properties, Applicants, Reports, Chain, Matching, etc. In the case of the search criteria the respective fields have been removed from the applicants record and are now stored in a new table. In the case of the advanced search, if used, the respective fields have been removed from both the applicants and properties table and stored in new tables. And finally the date fields in Sales Chasing have also been removed to a new table. This has been done automatically as part of the update and the change **should** not be noticeable.
 - All of the above classifications, except for Sales Chasing, are now alphabetically sorted when displayed in EAP.
 - Property, Vendor and Applicants sub-classifications can now be deleted. Care should be taken when doing so and the associated fields in the Property, Vendor and Applicants tables will be reset.
 - Sale Status, Response Monitoring, Sales Chasing, Marketing Expenses and Financial Services Classifications can now be deleted. Care should be taken when doing so and the associated fields in the Property, Vendor and Applicants tables will be reset.
 - The Sales and Lettings Chasing tabs layout has changed and now displays a strike-thru where applicable for a milestone.
 - Speeded up the opening of the Property Review screen.
 - The EAP temp folder on each users PC, normally c:\Users\Public\Documents\EstatePro\TEMP, is now cleared on opening EAP. The email debug log (EmailDebug.Log), if activated, is also saved in this folder so if you need to access it please do so before the user logs back in.
 - The amount of data written to the email debug log has been reduced. It now does not include sent images and attachments.
 - Fixed issue when saving cancelled viewings a message was still being displayed regarding the sending of automated email (if used). It was also not setting the Diary reload flag.
- 3.5.1.105
- The banner screen which is initially displayed in EAP and when no other screens are displayed has been enhanced. As well as the settings in Admin>Options>Company>Images/Documents to set Banner Image and Banner Message there is now a third option called Composite Banner. Creating a Composite Banner overrides the other two. An internal Word like editor is used to configure this and gives you full control over what is displayed including the background color. When this document is changed it will automatically be updated on all users screens when they have not done anything in EAP for one minute.
 - Contact Details on the Property screen now includes a graphical column to indicate whether the entry is for the primary or additional vendor. Additionally the primary vendor's email details are now shown in bold. If a default email is set then only that one will be displayed in bold. This also applies to the Applicant screen.
 - Emails sent to an additional vendor now also include the primary vendor in the **To** box. This can be removed if not applicable.
 - Price History report now gets its data from the same source as the Activity report and has additional info.
 - Fixed issue when deleting all images from a section in the Images screen where

- they would be cleared from the screen, but not actually deleted.
 - Fixed possible issue with sending of bug reports when using Microsoft 365 as email server.
 - Fixed issue when a Word Template was saved. It incorrectly set the type which resulted in it being deleted when a new version of EAP was installed.
- 3.5.1.104
- Emails were failing to be sent if the email server is Microsoft 365. This was due to a change in the minimum security settings required by Microsoft. Additional email security settings have been added to get round this.
 - If the Email Debug Log is activated this also now works if emails are sent in the background..
- 3.5.1.103
- General speed improvements when retrieving data from the database.
 - Changes to the Property [Valuation Screen](#) :
 - Appointments view was not being set to the date of the valuation when opening the screen.
 - Instructions on how to cancel a valuation are now included on the Valuation screen.
 - Error fixed when grouping by the **Branches** column on the **Viewings** screen.
- 3.5.1.102
- Fixed error introduced in previous version when adding any client (vendor, applicant, etc).
- 3.5.1.101
- All date input fields no longer throw an exception if a wrong or incomplete date is entered. Instead the error is trapped and focus will remain on the date field until it is corrected.
 - When using automated viewing emails errors when sending are now recorded in the database and are visible in the [Viewings](#) screen. There is also a list of all errors available in the [Viewing Auto-Emails](#) screen which is accessible from the main screen **Modules** section.
- 3.5.1.100
- At some point, fairly recently in the past, the display of images in the relevant sections of the capture screen had changed to being ordered by rows instead of columns due to a change in an underlying component. This was making it difficult to set the order of the images and has now been resolved.
 - When sending emails to a vendor any additional vendors are now automatically included in the **To** box.
 - When sending automated viewing emails to the vendor it is now also sent to any additional vendors.
 - **Warning** The Google Maps screen will shortly stop working due to Google dropping support for Internet Explorer which this screen is based on. Whenever the Google Maps screen is opened a warning to this effect is displayed at the top of the screen by Google. EAP will be changed in the near future so that Microsoft Edge (Chromium) is used and will not work without it. This is automatically installed by Windows Update but it is also necessary to install Microsoft Edge WebView2 run time which for some reason or other is not automatically installed. We believe this is installed when upgrading to Windows 11. EAP will prompt to install this for you.
- 3.5.1.99
- Height of address row increased in the Milestones tab of the Chain screen so that 5 rows of the address can be displayed.
 - Fixed issue with vendor or applicant solicitor override not being displayed in the Chain screen.
- 3.5.1.98
- Fixed error when doing a non-FS Referral from the Properties screen.
 - Due to technical reasons there is now only one bar displayed on the Chain form. Only the relevant buttons are enabled depending which tab you are on.
 - Sometimes when pasting from other sources into rich text edit fields with spell

checking enables, such as advertising text, an External Error exception was displayed. This has now been trapped.

- 3.5.1.97
 - The Milestones tab of the Chain Screen Down section is now sorted in the correct order.
- 3.5.1.96
 - The Milestones tab of the Chain screen now indicates which of the properties in the chain are yours by displaying an image at the bottom right of the column header (address). Clicking on the header will display the Sales Status screen.
- 3.5.1.95
 - The Chain screen now has the option to show/edit the Milestones (Sales Chasing Definitions) for all properties in the chain at the same time. This applies wherever the chain is opened from. It is disabled by default and can be activated in Admin>Options>Property/Vendor>Options. Further detail are available in the [Chain Flow Screen](#).
- 3.5.1.94
 - Added Available and Available Again and removed Withdrawn to the Sale Status options changed in the last version.
- 3.5.1.93
 - Fixed error when opening the Dashboard Validity check.
 - Sale agreed properties can now be restricted to only being able to change the status to exchanged or withdrawn unless the user has full administrative access. This is enabled in Admin>Options>Property/Vendor>Options>Restrict Withdrawal Date/Sale Agreed Access.
- 3.5.1.92
 - When deleting a classification in admin the timeout is now unlimited.
 - Fixed error when adding merge fields to Word Templates. It has been necessary to slightly change the look of the pop-up window that displays these controls.
 - Fixed error when clicking on Print Preview button in Clients Review screen.
- 3.5.1.91
 - Added back the Import button in Admin for Word Templates.
 - The mortgage referrer is now a drop-down box where the username can be selected. Automated email referrals (if used) are now sent from the referrers email address.
- 3.5.1.90
 - The branch a property is to be uploaded to Portals as can now be set on the Property screen (only applies when you have multiple branches). At least local admin access rights are required to be able to set this. Can also be filtered on in the advanced filter on both the Property screen and the Report Generator.
 - Dashboard chart display changed to make actual/target values more easily visible.
 - Two additional columns added to the SSTC section of the YTD Statistics screen. The net number of sales and the accumulation of this.
- 3.5.1.89
 - There is now an option in Admin>Options>General>Options to restrict permanent deletion of archived properties/applicants unless the user has full administrative access. By default this is off.
 - Vendor classifications are now available as merge fields in standard letters.
- 3.5.1.88
 - The Valuation report, available from the main screen, now includes the negotiator's initials.
- 3.5.1.87
 - There is now an option in Admin>Options>Property/Vendor>Options to restrict Withdrawal Date Access. By default this is off. When set, and the property is set as withdrawn, if the user does not have full administrative access, the date will be set to the current date and will not be able to be changed.
- 3.5.1.86
 - Fixed bug when all 31 Response Monitoring entries were defined.

- 3.5.1.85
 - Fixed bug when editing MS Word templates.
- 3.5.1.84
 - Beta Pipeline module changes. Filter button added. Pipeline referral branch added to the Properties screen (this can be filtered on). Referring branch split amount added to the Admin Pipeline Branches screen. Calculations changed to take into account referrals. If there is no referral then the listing branch will get both the listing and referral percentage split.
- 3.5.1.83
 - Beta Pipeline module changed so that a Pipeline branch can be set per user.
- 3.5.1.82
 - When viewing stored Excel or Word documents they are now opened internally within EAP rather than using Excel/Word. This has the advantage that they can be edited and saved.
 - Beta version of new Sales Pipeline module available for EAP Destiny users. There is no documentation available for this yet. If used this should be defined for each property and will appear under vendor classifications. Exiting properties have been automatically updated and new properties will be automatically assigned to the users branch. This will only need to be changed if different.
- 3.5.1.81
 - Further optimization when retrieving contact details.
 - Fixed issue where the initial price of a property was not correctly recorded in the property history.
 - Fixed issue when filtering in Mortgage Referrals screen.
- 3.5.1.80
 - Changes made to ensure contact lists on all screens are not duplicated.
- 3.5.1.79
 - The contacts grid on the Viewings screen is now limited in width according to the size of the screen.
 - Fixed error when trying to change the colour of an image from the image editor.
 - Fixed error when refreshing a property if there is only one branch defined.
 - Trapped error "Cannot release theme Aluminum" which happens under certain circumstances when exiting EAP.
- 3.5.1.78
 - Minor bug fixes.
- 3.5.1.77
 - There is now a setting in Admin>Options>Property/Vendor>Options to include the House Name/Number in the new EPC Certificate image. The default is to include it.
 - Fixed issue when trying to view old templates that were stored as Word documents, rather than PDF's.
 - In multi-branch installations the email server being used is now shown in the status bar of the main screen.
- 3.5.1.76
 - Following government changes in EPC certificates, an EPC New Style flag can be set which will generate an EPC Certificate image rather than an EIR graph. All new properties will be automatically set to the new style. The EPC Certificate image will not be uploaded to Rightmove, etc. until a certificate number and valid until date has been entered. Both the certificate number and the valid until fields are available in standard letters. See the [EPC Screen](#) for more info.
 - There is now an online documents entry for the EPC Certificate in the Advertising Screen. This entry is also available as a mail merge field in standard letters.
 - Fixed the problem with the Standard Letters editor in Admin>Options>General freezing when being maximized.
- 3.5.1.75
 - Fixed issue in the Viewings screen where, if there was only one viewing, the contact details were not being displayed.
- 3.5.1.74
 - Fixed slow-down in loading diary caused by new features in to do list implemented in previous version.

- Images screen now displays portrait images without them being stretched.
 - Users can now be given limited access to editing archived properties. Any changes will not be recorded as activities.
 - Major internal changes have been made to the Viewings screen, wherever it is opened from. It's visual appearance is slightly changed so that more appointments can be seen. The viewings screen was slow because it loaded all viewings and then just applied a filter to them. It now only loads those viewings required. In the case of the Viewings Review, only non-completed viewings are loaded. A filter is still applied, and can be closed in order to correct any changes made by mistake since the screen was loaded. Opening the screen is much faster and saving changes has been made as fast as possible but, depending on the changes made, a lot of updating of the database is done including updating the diary for accompanied viewings, client reviews, property statistics, activities, etc.
- 3.5.1.73
- The PDF viewer now always uses our own internal viewer and is not dependent on Adobe being installed. When viewing PDF's they previously were saved to disk prior to viewing. This necessity has now been removed.
 - The Ravensworth Print module has been removed.
 - Some of the internal icons used have been changed.
 - Tasks panel on Diary screen is now grouped by Properties (if assigned to the task).
 - When cloning a client the time taken to display the list of clients has been improved.
 - A button has been added on the Additional Vendors tab of the Property screen to add an additional vendor using the primary vendor's details. The equivalent button has also been added to the Applicants screen.
 - Some additional informational columns are now displayed when refreshing a property and the filtering has been improved. There is also an option to refresh properties overnight rather than immediately.
 - Fixed issue when generating a sales memorandum, if the applicants solicitor had been overridden in the applicant screen, this was not being used.
 - When saving images, if an image had changed within a section, even if it is just the order, they were previously deleted from the database and re-added. This mechanism has now been improved so that only data changed is then needed to be re-uploaded.
- 3.5.1.72
- Improved the functionality of YTD Statistics and moved it from Reports to the main screen, Modules section. See the [YTD Statistics Screen](#) for more info.
- 3.5.1.71
- Fixed issue with the price and fee for fall through's being blank in the Activity report if the fall through date was set at the same time as resetting the property to available.
 - The Activity report now includes commission for Offers Rejected/Withdrawn.
 - There is now a per user option to keep a debug log of the email sending process. The setting for this is in Administration>Options>Company>Users>Communications tab. This option will have no effect if you are sending emails in the background. This should only be activated if you are having problems sending emails and should be switched off immediately after any problem is resolved as the contents of the file will become very large. The log file is called EmailDebug.Log and is stored in a sub directory of the shared documents folder. This is normally C:\Users\Public\Documents\EstatePro\TEMP.
- 3.5.1.70
- Administration>Options screen menu layout changed to a more modern look.
 - For Vendors, the Client Review screen now indicates which property the focused row refers to.
 - Each property now has its own next review date and review frequency on

the main tab of the Property screen in a new Review section. This is initially populated from the corresponding client entry. This is completely independent of the equivalent client settings.

- The properties last review date can be filtered on in the Report Generator screen by using item Property - Last Review Date (the last review date is still available to be filtered on by client).
- The Progress Review screen has been renamed the Property Review screen and has been changed as follow:
 - It is now based on the new property next review date rather than the client review date.
 - Reviewing a property will not update the clients next review date (unless this is automatically triggered by sending a letter, etc) .
 - There is no automatic updating of the property's next review date from anywhere else in the application.
 - A Vendor/Landlord column has been added so that it can be sorted and grouped on.

- 3.5.1.69 • Increased timeout on custom reports.
- 3.5.1.68 • Added a documents tab to the Clients screen. Works the same as applicant and vendor documents.
- 3.5.1.67 • Fixed error when refreshing a property if there is only one branch in the database or the option to use multiple branches in a single installation has been activated.
- 3.5.1.66 • When automatically sending Mortgage Referral emails in the background some were being skipped because the negotiator was not the same branch as the vendor/applicant. This has now been fixed.
- When Mortgage referrals were set to be validated, not all fields were being validated for rental vendors/applicants. These are now also validated if the FS Module is set to include rental properties.
- After using the "Quick Tick" option in the Applicant Match screen the selected letter is now refreshed.
- 3.5.1.65 • In Particulars screen improved the trapping of errors when entering measurements into the details box and automatic metric conversions are enabled.
- 3.5.1.64 • New FS columns added in previous version are now displayed in the Mortgage Referrals module.
- 3.5.1.63 • Fixed problem when exporting list of applicants or properties to Excel CSV from Reports>Generate screen.
- Fixed problem overriding the Vendor's solicitor.
- The new FS Items FS Appoint Date/Time, FS Cancelled and FS Appoint Where can now be filtered on using the advanced filter in the Reports>Generate screen for both applicants and properties.
- 3.5.1.62 • Dashboard values are now calculated based on saved statistics. Sales are now net of fall thru's. Instructions are now net of withdrawals.
- Mortgage Referral emails, if used, are now sent in the background by the synchronisation service. Emails are sent on behalf of the negotiator and will only be sent if GDPR permission is given and a mortgage is required. From now on the date/time the email was sent will be shown on the respective Mortgage Required tab. The referral can now be set as cancelled together with a reason for the cancellation. The reasons can be defined in Admin>Options>Modules>Financial Services.

- 3.5.1.61
 - Sales/Lettings screen, Central Notes tab, a Whom column has been added with options to select, by default, Vendor, Vend Solicitor, Purchaser, Purch Solicitor & General. The row is now colour coded based on these settings. The default entries and colours can be changed in Admin>Options>General>Central Notes Whom. See [Central Notes Tab](#) for more info.
 - Appointment Date/Time and where added to both applicants and vendors Mortgage Required tab.
 - There is now a new ICO section on the [Client's Screen](#). The ICO Expiry Date can be searched on in the Advanced filter tab of the Report Generator Property and Applicant search.
 - The print preview on the Viewings screen now has the option to exclude the vendor's contact details.
- 3.5.1.60
 - The last amendment date/time can now optionally be shown for dated notes on the applicants screen, properties screen and the central notes of the purchase screen. It is not visible by default and can be set in Admin>Company>Users on a per user basis.
- 3.5.1.59
 - Changing/creating a valuation was not updating the main diary unless a refresh was done. Fixed.
- 3.5.1.58
 - The Property Lease screen was not showing the estate agent's contact details. This has been fixed.
 - Speeded up changes to the viewing screen when the date/time of the viewing has not been changed.
 - Fixed a problem using the Del key to delete appointments in the Diary screen. When doing so this was causing the diary to become non-responsive.
- 3.5.1.57
 - When using automated viewing emails, and a confirmation letter is defined for vendors, the message displayed now says that the email will be sent to both applicant and vendor.
 - Applicant matching was sometimes generating an error, This only happened in some circumstances and has now been fixed.
 - The Reason and Method column widths in dated notes (where used) have been made a fixed size.
- 3.5.1.56
 - Running EAP twice on same PC, even accidentally, was deleting the EAP temp folder on the users PC when the 2nd invocation of EAP still needed to use it to send emails. This then resulted in a Windows error stating that the folder could not be found. This has been fixed.
- 3.5.1.55
 - Automated viewing emails can now also be sent to vendors/landlords. Because this can now be defined for both applicants and vendors, this admin option has now been moved to Modules.
 - Non-trial versions of EAP can now be opened multiple times on the same PC but different user login/server must be used.
 - When this web enabled check box was moved from the properties screen to the advertising screen the code to store this change in the property's history was not moved with it. This has now been reinstated.
- 3.5.1.54
 - Fixed error in Dashboard when there are no values for a new month/quarter.
 - When changing the vendors commission rate/amount the new calculated amount was not being shown in the Activity report. This has been fixed
 - When matching rental applicants from the Property or Applicant screen whether they rent per week, month, quarter or annum is adjusted for comparison purposes so that it matches that of the property. This will not affect any display values.

- 3.5.1.53
- Vendor last review date can now be filtered on in the Reports>Generate>Property tab.
 - An unlimited number of identification documents can now be entered on the identification tab of the Clients screen.
 - Advanced Money Laundering (AML) Risk Assessment with automatic score calculation has now been added for both applicants and vendors. There is a setting in Admin>Options>General>Options to make the completion of these details mandatory when a property status is changed to Sale/Let Agreed. This is false by default. This screen is also accessible from the Sales/Rent screen.
 - The AML Total Score and whether it was referred to your AML officer can be filtered on in Reports>Generate for both applicants and properties.
 - Default tenancy fees can now be inserted via a button on the Advertising>Tenancy Fees tab. The default template can be defined in Admin>Options>Company>Images/Documents. This is a plain text field.
- 3.5.1.52
- if you have lots of matches, depending on the speed of your server and network ticking which applicants/properties to include can be slow as this has to load the letter and contact details and also record that a match has been done or not. To get round this a button has been added to the toolbar which opens a new screen which does not do any updating until it is closed.
 - Resolved the problem when opening viewings from the offer screen.
 - Resolved problem with not being able to filter by negotiator in the applicants tab of the report generator.
- 3.5.1.51
- Some cosmetic changes made for better support of screens that have been changed from the default 100% resolution.
 - Registering an applicant as a vendor and registering a vendor as an applicant was not scrolling to the new record correctly.
 - A hybrid scroll bar, similar to that of Windows 10, is now used throughout EAP. This has the advantage of taking up less screen space in narrower tables unless it needs to be displayed.
 - The Viewings screen was not always displaying the contact details for the first viewing in the list when initially opened.
 - Any changes made in the Valuations screen are now saved when generating a Valuation Template.
 - Fixed problem where Whole Database Report, YTD Statistics was not correctly showing Offers.
 - Fixed problem when automated confirmation emails are defined a confirmation email was not being sent to the applicant if the viewing was added and saved and then at a later stage V.Conf and A.Conf was being ticked.
 - Users can no longer be deleted if they are still set as the negotiator, sales negotiator, etc. of an active property.
 - It is now possible to just use one server for multiple branches providing the hardware and network infrastructure is in place to support this. There is now a setting in Admin>Options>Company>General but this can only be changed by EAP Technical Support as there are other changes that need to be made external to EAP. When the is set the following applies:
 - In Admin>Options>Company>Users all users are displayed and the branch they are assigned to can be changed.
 - The users username must be unique. This can be changed if they move branches. When logging in the branch they are assigned to is their "Active" branch. If there is a duplicate username an error will be displayed and they cannot login.
 - The amount of data synchronised is reduced to only that required for onward transmission to portals. Also there is no need to download any data so this overhead on the server is totally removed.
 - An Admin>Options>Property>Vendor>Force Refresh any branches property

- can now be refreshed.
 - o In Admin>Options>Company>Branches all branches can be edited.
 - If a stored letter was sent by email it can now be resent from the Draft/Sent Letters screen. This will automatically add email headers/footers. The new email will also be stored.
- 3.5.1.50
- Minor changes can be made to automatically generated activities on the Activity form. This is off my default but can be enabled on a per user basis. It is suggested that this option should only be made available to very few users and is purely available for the correction of mistakes.
 - In draft & sent communications the description column can now be changed.
 - Memorandum of Sale now has the option to hide the vendors address..
 - Fixed problem when opening viewings screen from some places that it was not being positioned to the most recent viewing.
 - Resolved an issue that only occurred only if the Windows font/app size had been increased. The only place this appears to have caused a problem, besides, the application looking ugly in places, was when opening the diary to select a new viewing date/time. It is not recommended to change these settings. A "Select" button has also been added to this screen in case there mouse clicking timing issues when using Windows Remote Desktop.
- 3.5.1.49
- Added the Property Manager field to the Properties screen. This can be used in the advanced filter on both the Properties screen and the Report Generator screen. Also added to Property Management alpha test.
 - The dashboard now has a check box in the YTD Statistics toolbar section called "Use Activities". Ticking this will get the YTD statistics from the same source as is used in the Activities screen. This will enable multiple activities per property to be reported on. This is test functionality and will become the default method once fully tested.
- 3.5.1.48
- Fixed problem generating the Progress Review screen.
 - Fixed problem when adding new viewing where the diary is not being displayed in order to select a date/time for the new viewing.
 - Fixed problem when adding a viewing for the applicant match screen.
 - Reports>Generate was opening with the Applicants tab selected instead of the Properties tab.
- 3.5.1.47
- From this version on references to Property Management will start to appear. This is the new chargeable module for property management of both sales and rental properties. These options will be disabled until a beta release is available and you wish to participate.
 - Fixed problem when changing the asking price in the Sales screen the internal User Price Details field was not being updated.
 - Fixed problem where if in Admin/General/Option, Applicant/Vendor – Validate Mortgage Required set to No, this was still being validated in the Applicant and Property screens.
 - Fixed problem with stored documents. When sending a communication by any means other than email the description shown in the sent letters form was displayed as something like {28ADF184-63FD-408D-818E-6E992FC273C9} instead of the name of the letter.
 - Fixed problem with Valuer column in Generate>Reports>Properties when archived properties are included and valuer is filtered on.
 - Fixed issue In the respective Sales/Lettings screen available from the Properties screen where some validation checks, such as setting the Lettee, were not being made for lettings properties.
 - Fixed problem with duplicate automatic viewing confirmation emails being wrongly sent.
 - Whole database report Agency Agreement now includes columns for Agency

Type, Weeks Agreed and Active e.g. not expired.

- Whole database report Sale Board Location has been changed to include the managing Branch.
- When the property sale/rent status is set to Withdrawn all property dates are reset.
- Lettings statuses are now more in line with sales statuses e.g. equivalent of "Sale Agreed" is "Let Agreed" and "Under Offer" is "Under Application".
- Fixed problem when matching applicants to properties and selecting just your own properties.
- When the property status is turned back to valuation, for example if it is unarchived for re-sale, you are now asked if you want to delete the previously entered valuation details.

3.5.1.01
to

3.5.1.46

- The database has been completely restructured to allow us to more easily add new functionality in the future with particular emphasis on multi-branch usage. This has mainly been to remove the linking of tables by property reference and applicant reference. Any custom reports will have to be changed to use the new structure.
- On installation/upgrade 64 bit versions of the EAP Server service and EAP Client Service are installed on 64 bit operating systems. 32 and 64 bit versions of the application are also installed.
- The registration process within EAP has been changed to use a more simple, drag and drop, mechanism. It is no longer based on the machine ID of the PC where it is installed. See the [Registration Screen](#) for more information.
- The mechanism for adding another branch's property/applicant introduced in version 3.4.1.21 has been removed and a more simple mechanism has been introduced to replace it. Once a property/applicant has been added the assigned branch can be changed in the Properties Screen or Applicants Screen as applicable. This can only be done if the user has been given the rights to do so in Admin. Changing the branch means that the reviews are based on this field and also, for properties, the details are uploaded to the portals according to this setting.
- The EAP PDF Printer has been removed and can be uninstalled from your PC. PDF generation is now done through Microsoft Word and requires a version of MS Word that supports this functionality.
- The [Dashboard Screen](#) has been enhanced to include target v actual YTD Statistics shown as both a drill down chart and as a data view. The targets to include can be defined in System Administration Company Options screen. The visibility of the data can be set on a per user basis as to whether to include their own or all branches data or they can be restricted to just seeing their own statistics. Initially the Statistics shown are for the current year to date but data for previous years can also be displayed. If the Dashboard cannot attribute an action to a particular user (normally because they are set to not have targets) the actions are now entered as Branch XXX and User XXX. When all settings are correct this will not appear. The top section of the now respects the Admin>Company>Users setting "Show All Branches" in the Dashboard Settings. It now also has an alternative method of setting the date range to use by setting a from and to date and then clicking on the refresh button below the dates.
- Client Look-up Screen has had a search function added.
- When a filter is applied to properties in the Report Generator Screen a new Filtered Properties button is enabled which, when clicked, will open the Properties Screen with just the filtered list of properties displayed. The currently selected property will have focus. This capability has also been extended to the applicant list.
- On the Client's Screen tabbing into or clicking on the Address field will now automatically activate the Address Screen.
- The Portfolio Screen now includes all images except for EPC and "Other"

images.

- The Offers Screen has had buttons added to be able to view both the Applicants and Vendors solicitors details as well as the underlying client details.
- Standard letters can now optionally be sent as an attachment. This is applicable wherever a letter can be sent via email.
- When opening the Offers Screen from the Properties Screen the applicant who has had an offer accepted (if applicable) will be automatically scrolled into view.
- The buttons on the toolbar at the bottom left of the Applicants Screen and the Properties Screen have been increased in size.
- The Price and Fee columns on the Activity Report Screen now have totals when grouped.
- The Client's Screen now indicates where you have come from by means of a notification area in the ribbon.
- Negotiators are now stored in EAP using the GUID field stored in the Users table (unique reference) although the initials are still displayed in the Applicant and Properties screens. In versions of EAP prior to version 3.4.1.19, mistakenly, anything could be entered into the negotiators field. Now these erroneous entries will show as blank. Please check all applicants and properties and ensure that an applicant is assigned.
- Dated notes on the Properties Screen can now be copied to any other property specified in its chain.
- In the Properties Screen, when matching a property to applicants, the selection box previously only allowed the option of selecting a single branch or all branches. This has now been changed to a drop down check box allowing multiple branches to be selected.
- The time entered is now shown as well as the date for dated notes on the Sales/Rent Status Screen.
- The automatic setting of the next review date when certain actions are taken e.g. amending the asking price, sending an email, etc. can now be disabled in Admin>General>Options.
- The following screens have been enhanced to allow the sending of letters to the primary applicant/vendor and/or any secondary applicants/vendors: Offers Screen, Sales/Rent Status Screen and Viewings Screen.
- All dated notes now use the spell checker by default.
- Splitters have been added to those screens that would benefit from the ability of being able to re-size specific areas of the screen e.g. the Client Review Screen.
- Contact details on all screens now shows more relevant information. Please see [How do I use the contact details grid?](#) for more details.
- The Google Map Screen has been enhanced.
- When generating a letter to a single applicant/vendor any additional (secondary) applicants/vendors are listed so that they can also be sent the letter. See the [Communications Screen](#) for further details. The following screens can now additionally be used to send communications: Progress Review Screen, Matches Review Screen and Client Review Screen.
- In look-up forms the return key can now be used to make the selection as well as double clicking or clicking on the green "Go" button.
- A new find mechanism has been introduced for properties and applicants. This mechanism filters out all properties/applicants that do not match the search string in any of the current visible columns in the left hand grid. This find automatically happens after a short delay after entering a search string. In the case of properties the Vendors tab now has an additional column for Company. When adding a property/applicant this search will be automatically cleared. The same search mechanism is also used in the Reports>Generate.
- When adding a viewing, after selecting the applicant/property as applicable, The diary screen is now displayed so that it is easier to see when you want to make the appointment for. Double clicking on the applicable time slot will automatically close the screen and set the date/time of the viewing.
- The ability to add warning notes has been added to the applicants screen. This

functions exactly the same as it does for properties and is defined on the Documents tab.

- Where the same client has multiple properties or applicants but needs to use a different solicitor for each property or applicant the solicitor used can now be overridden for each property or applicant. For properties this is on the Vendor>General tab, for applicants it is on the main tab.
- Added merge fields in standard letters to get the applicant and vendor's solicitor's first name.
- In the Applicant Search (Advanced) of the Report Generator Mortgage Required can now be filtered on.
- In Admin, where reasons for non-referral (Financial Services Module) are defined there is now an exclusions check box. Ticking any of these will result in them being excluded from the non-referrals report. Cash Buyers will no longer be automatically excluded until you set them to be so.
- Certain currency fields on the property, applicant, sales and offers screen can now have the amount entered by means of a shortcut e.g. entering 420k will be immediately expanded to 420,000.
- When adding a PDF as a stored document, if that document is locked by another application/user, and cannot be loaded, a warning message is now given instead of raising an error.
- The Client Review Screen dated notes section now has more capabilities (Diary, ToDo's plus the ability to copy dated notes as applicable). It has also been changed to have a from/to date range.
- When viewing archived properties the dated notes facility is fully available. It is also possible, on the Vendor tab, to change the next review date and set whether the vendor should continue to be reviewed if the property is archived.
- Alignment of the Survey Tab of the Property screen changed to favour larger screens.
- Any solicitor marked as important will now appear first in any solicitor look-up field.
- The Viewing Book Screen now has a column to indicate if the applicant who viewed the property requires a mortgage. Generated reports also now include this information.
- If any of the valuation items are filtered on in the advance property filter of the Report Generator Screen the Valuer's Initials column is automatically displayed.
- If a new valuation date/time is set in the Properties Screen if a valuation had been previously cancelled that flag is now reset.
- In order to speed up the loading of the Diary on large databases appointments are now loaded dynamically as the calendar is changed (normally slightly over a month at a time). Additionally appointment diaries such as those shown for valuations and surveys are now independent of the main diary. The Diary is only checked if it requires refreshing when you switch to it or click on the Refresh button.
- The Status box on the property screen now has its background colour set to make the status more obvious.
- The day view of the diary incorporated in the dashboard and viewings screens, and the surveys and valuations tab of the property screen has now been changed to an agenda view which only shows the dates where appointments exist. Additionally the valuations agenda view only shows valuers, the viewings agenda view only shows accompanies, etc.
- The Progress Review Screen now has a column which displays the Sales Negotiator and now displays central notes.
- The Email Screen has been changed so that the selection of the email addresses to send to (or cc or bcc) works in the same way as Microsoft Outlook e.g. uses tokens. Additionally, when sending emails your own email is added to the cc or bcc boxes for possible inclusion. This email will either be your own or the branches email address depending on how you have been configured.
- The Report Generator Screen now has buttons to export both the filtered list of

properties and applicants to CSV. The file will be opened in the default viewer for this type of file after export (normally Microsoft Excel).

- The review frequency, as well as the next review date can now be changed directly on the applicant and properties screens.
- The actions which cause an automatic update of the next review date can now be configured in Admin>Options>General>Automatic Reviews.
- The area search criteria in the Applicants screen can now optionally include spaces by surrounding the specific search string in double quotes e.g. TN1 would normally match to addresses that contained TN1, TN11, TN12, etc. but entering "TN1 " would make this more specific.
- When resetting a property's status from sale agreed to available it is now mandatory to enter the fall through date.
- The clients birthday for the current year can now be filtered on in the advanced filter of the Report Generator and the Marketing screens
- The submission of error reports now uses the same email settings used for sending normal emails so this should no longer be a problem with any firewall settings.
- Added a mail merge field called 'Property - Sales Negotiator Initials' to Standard Letters.
- Added an option in Admin>Property/Vendor>Options to set the default value of 'Review when Archived' when adding a new property.
- The Rental Status screen now has a field for entering the rental deposit which is also uploaded to Rightmove.
- The Key No. and Key Letter can now be used in the advanced filter on the Property screen.
- Standard letters can now be emailed from the Communications screen irrespective of whether the applicable vendor or applicant has an email address.
- The images on the Identification tab of the Clients screen can now be expanded.
- In the Applicant Match screen when the Inc(lude) check box is changed the letter is regenerated in case it is a letter that includes a list of properties.
- Negotiators and sales negotiators drop downs have been changed so that when there are duplicate users in different branches defined these are shown with the branch also e.g. KC (TON) and KC (CRO). They are now also sorted by the negotiators initials.
- Sales Negotiator - Initials can now be filtered on in the advanced filter of the Property screen.
- When sending an email a sent notification is shown for a few seconds. This can be turned off in Admin>Company>Users for each user on the Communications tab. There is also an option pin the notification which means that it will stay displayed until it is closed.
- Users can now be defined as negotiators in Admin>Company>Users to reduce clutter in the negotiator drop down lists. All users default to negotiators.
- EAP now uses the standard Windows dialogs to load images and files.
- The all database report "Solicitors Instructed" can now be filtered on all columns including the addition of the "Sales Status" column.
- When sending a standard letter by email the subject now defaults to "Letter from" plus your company name. This can be overridden on a per letter basis by entering the following text on a separate line anywhere in the standard letter. This should include the brackets: **{EMAILSUBJECT:Market Your Home Now}** and will be automatically removed from the text of the letter.
- Login name/branch is now shown in the status bar at the bottom of the main screen.
- Added option to Viewing and Viewing Book screen to print the viewings grid. This will be in whatever order/grouping it is on screen and will not include contact details.
- Individual offers can now be deleted if they have not been accepted. This should only be used if an offer was added by mistake.
- When clicking on the Portfolio button on the Property screen data will now be

automatically saved if there is no missing data.

- Market as Avail changes are now recorded in the event history.
- When viewing Draft & Sent Letters if it was an email an automatic margin is now set for the document of 0.5 inches on all sides to facilitate printing.
- The Important caption on the Client's screen has been changed to VIP.
- Changes made to the latitude and longitude of a property are now uploaded to Rightmove Live (if subscribed) and used to locate the property on Rightmove maps instead of the postcode location. It is not possible to upload this to other portals as there is no interface to be able to do so.
- EPC/EIR rating can now exceed 100 (max 110).
- The purchasers and vendors first names are now displayed in the Sales Memo.
- Wording used on the Client's screen in respect of the Data Protection Act has been changed to the General Data Protection Regulation (GDPR).
- Recognising that with the advent of GDPR it may be necessary to delete multiple applicants from the archive we have implemented a feature to do this. In the users screen there is now an option to set whether Multiple apps can be deleted. This is disabled by default for all users. If set to 'Yes' the corresponding button in Archived Applicants will be enabled. This will delete all applicants listed in the archive. To exclude applicants to be deleted a filter should be set. This should be used cautiously as this cannot be undone. If the respective client is not linked to another applicant or property that too will be deleted. A corresponding button has also been added to the normal applicants screen to archive multiple applicants in the same way.
- Again, in connection with GDPR, there is now a button in Admin>Options>Applicant>Options to clear all applicants GDPR settings.
- All dated notes now have two additional columns (Contact) Reason and (Contact) Method. These can be defined in Administration>Options>General and can be made mandatory in Administration>Options>General>Options.
- The fact that the logged in user has referred a solicitor can now be recorded in the Clients screen. The info on who did it and when is also recorded but not shown. 'Solicitor Referred' and 'Solicitor Referred Date' can be filtered on in the advanced filter of the Marketing and Reports>Generate (Properties & Applicants) screens. A new button has been added to the main toolbar in the Modules section Called 'Solicitor Referrals' to display these referrals. The existing 'Referrals' button has been renamed 'Mortgage Referrals'.
- Solicitor Referrals can now be included in the Dashboard, by default they are not included. Targets can also be set for them.
- When adding dated notes the necessary fields are now displayed in a form mode which gives more space to insert the note.
- The "Draft & Sent Letters" button is now always enabled, whether or not there are any letters as checking to see if any letters had been sent was too big an overhead on installations that had a very big customer letters table.
- Standard letters can now be set to not store images in the sent letters table.
- Vendor commission rate can now be 3 decimal places.
- When generating letters from the Applicants screen if the applicant is associated with more than one property you will be prompted for which one to use when merging property details.
- The Mortgage tab on the Properties and Applicants tab has been renamed Financial Services. An option is now available in Administration>Options>Modules>Financial Services to include Rentals. If this is set to Yes (the default is No) then this tab will be visible for rental properties/ applicants.
- Over time more and more information has been added to the property screen and this has obviously had a knock on effect on speed. The tabs Advertising, Lease, EPC, Particulars, Survey & Valuation have now been removed and replaced by buttons in a new group called **Property Links** on the [Properties Screen](#) toolbar. For consistency some other buttons such as Images have been moved to this new group. This makes opening the Property screen and moving between

- properties faster and will also use fewer resources.
- The Tenancy tab has been removed from the applicants screen and is now available as a button in the new group called **Applicant Links**. For consistency some other buttons such as Viewings have been moved to this new group.
 - General speed improvements when opening the Applicants screen.
 - General speed improvements when accessing solicitors, estate agents and surveyors from Admin>Contacts and Admin>Options>Contacts.
 - The Lease button on the Property screen is now enabled when the tenure is set to 'Share of Freehold'.
 - Tables Users and Users Targets are now available in Custom Reports.
 - To avoid confusion the [Google Map Screen](#) now has an option to save the modified location. It will still prompt whether you want to save the changes on closing the form if you have not already saved the new location. The latitude and longitude of a property can now be entered directly.
 - Solicitors Referrals now has total and group counts.
 - Beta version of the automated sending of viewing emails (Viewings Letters) to applicants (both confirmation and reminders) is now available and can be configured in Administration>Options>Applicants>Automated Viewing Emails. Please be aware that this is a beta and that there could be some problems with this. No detailed help is available at this stage. This will ultimately be extended to include the ability to send similar emails to vendors. This is dependent on users emails being correctly configured and will send the email from the person who entered the viewing. An email is only sent if both the applicant and vendor have confirmed the viewing. Sent emails will be stored as normal. This capability is only available in the multi-user Enterprise version of EAP and by default is disabled.
 - When defining communications for users in Admin there is now a test button.
 - Fee is now shown in activity report for Aborts and Withdrawals. Also the sales negotiator is shown for "Sale Agreed" and "Fallen Sale/Aborted" activities.
 - The Matches screen layout has been changed with the applicant dated notes section now having the same columns as on the applicant screen.
 - Changed vendor tab on the list of properties on the Properties screen to show the full name and address of the vendor for better searching. Removed Street tab as now redundant.
 - Both the Applicant and Properties screen now give a warning when you focus on a record which has been archived by another user since you last refreshed the data. After the warning the respective applicant/property will be removed from the list.
 - Speeded up initial loading of Client Review screen and also added a count at the grouped level..
 - When setting a letter to be emailed to be sent as an attachment this is now sent as a PDF rather than an RTF file.

10.2 Future Development



We are currently planning on implementing the following enhancements in future versions of EAP. This information is subject to change and is not in any particular order

- The existing word processing/mail-merging component is to be replaced.

Index

- A -

Activity report 88
 Adding a property 20
 Adding a viewing 23
 Adding an applicant 25
 Adding images 30
 Adding new clients 124
 Adding offers 27
 Additional applicants 98
 Additional vendors 246
 Address entry 290
 Address Labels 68
 Administration 183
 Administration of Estate Agent Pro 329
 Administration Options 331
 Advanced Money Laundering 291
 Advertisements Screen 90
 Advertising details 232
 AML 291
 Applicant events 158
 Applicant Options 331
 Applicants screen 92
 Applicants search 261
 Appointments 151
 Archive 58
 Automated Viewings 108

- B -

Balance of account 174

- C -

Carousel designer 110
 Carousel screen 109
 Chain flow 113
 Client review 118
 Clients screen 124
 Clone a property 300
 Colour adjustment screen 166

Communications screen 133
 Communicating with customers 142
 Company Options 336
 Confirmation Dialog 301
 Contact Options 347
 Contacts screen 138
 Copy Dated Note 302
 Copying a property 300
 Custom reports 33, 140, 255, 261

- D -

Dashboard 145
 Data Protection Act 131
 Delete 58
 Diary screen 151
 Digital cameras 162
 Documents 102

- E -

Email Screen 304
 EPC Charts 238
 EPC details 238
 Estate Agent Pro screens 87
 Events history 158
 Expenditure 177
 Expenditure and Income 174

- F -

Filtering Applicants 91
 Filtering Properties 59, 91
 Frequently Asked Questions 19

- G -

Gallery Screen 168
 General Options 351
 Google Maps 159

- H -

HIP details 238
 How do I add a property? 20
 How do I add a viewing? 23

How do I add an applicant? 25
 How do I add an offer? 27
 How do I add images to a property? 30
 How do I change an address? 32
 How do I create a custom report? 33
 How do I Create a Microsoft Word template? 48
 How do I create a standard letter? 51
 How do I delete an applicant or property? 58
 How do I filter properties? 59
 How do I make properties uploadable? 64
 How do I match applicants to properties? 65
 How do I match properties to applicants? 67
 How do I update an Applicant/Vendor? 68
 How do I use grid column grouping and filtering? 68
 How do I use the contact details grid? 71
 How do I use the grid navigation buttons? 73
 How do I use the postcode lookup? 74

- I -

Image loading 162, 168
 Images Editor Screen 169
 Income 177
 Income and Expenditure 174
 Installing Estate Agent Pro 77
 Introduction 9

- L -

Lan vs ASP Model 11
 Leasehold 240
 Lettings Income/Expenditure 177
 Lettings Screen 174
 Loading images 162, 168

- M -

Main screen 178
 Maps 159
 Marketing screen 184
 Matches review 189
 Matching applicants 65, 67, 92, 105
 Matching properties 105
 Microsoft Outlook 151
 Microsoft Word Templates 48
 Modules Options 362

Money Laundering 131, 291
 Mortgages 99

- N -

Notes, Copy 302

- O -

Offer Book screen 194
 Offers screen 196
 Open matches 189

- P -

PDF Viewer 311
 Permanently Delete 58
 Portfolio screen 214
 Postcode lookup 74
 Price qualifiers 75
 Professional Contacts 313
 Progress Review 219
 Properties screen 223
 Property chain 113
 Property events 158
 Property offers 196
 Property particulars 241
 Property search 100
 Property status screen 269
 Property surveys 242
 Property templates 255
 Property valuations 244
 Property/Vendor Options 364

- R -

Registration of Software 317
 Reminders 151
 Rental 103
 Rental Progress Review 219
 Rental status screen 269
 Replication of data 326
 Report generation 318
 Report generator 255, 261
 Reports 140
 Review cycle 118

Review matches 189

- S -

Sales 272
Sales Chasing 272
Sales Progress Review 219
Sales status screen 269
Sending emails 304
Sending SMS text messages 320
Slide show 109
Software Registration Screen 317
Split chain 113
Standard Letters 51
Standard Reports 255, 261
Statement of accounts 174
Support screen 275
Surveys 242
Synchronisation of data 326
System Administration 183, 329
System Options 371

- T -

Task list 151
Technical support 275
Tenancy 103
Tenure 240
Text Messaging Screen 320
Troubleshooting 373

- V -

Valuation report 276
Valuations 244
Vendor details 246
Viewing book 277
Viewings screen 278

- W -

Warning Screen 323
What equipment do I need? 11
What is Estate Agent Pro? 10
Word templates 48, 255