

Agentbox Training Manual

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Welcome



This area is your help and support section for your system, providing on-demand video tutorials (Coming Soon!), frequently asked questions and 'how to?' quick tips guide .

How do I get support?

For any support enquiries please contact Support between 9am - 5pm Sydney time, Monday to Friday

Phone: (02) 9209 4174

Email: support@agentbox.com.au.

How do I get support after hours?

For any after hours enquiries, please email support@agentbox.com.au, with the urgency stated in the subject.

How do I organise more training?

For any on-line or on-site training enquiries please contact Agentbox Support on (02) 9209 4174 or email support@agentbox.com.au

System requirements

What software downloads will I need?

To ensure smooth operation of your Agentbox system, please ensure you have the latest versions of the following software installed:



[Mozilla Firefox](#)



[Adobe Flash Player](#)



[Adobe Acrobat Reader](#)

What internet connection will I need?

We recommend a minimum 1Mbps upload and 1 MBps download speed. You can test this at sites such as <http://speedtest.net/>

Once you have conducted the test, you will be advised of your current office download and upload speed.

Getting Started



Welcome to Agentbox! To help get you started simply follow the topics below:

[How do I log in to my Agentbox system?](#)


[How can I log out of my Agentbox system?](#)

[How do I change my password?](#)

[What do I do if I have forgotten my password?](#)

Log In

How do I log in?

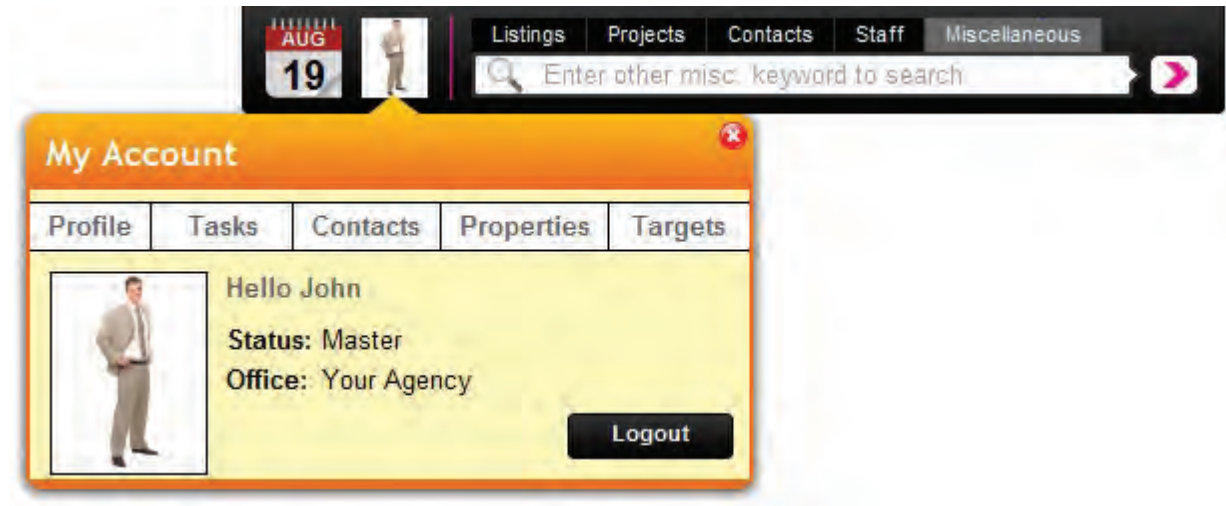
1. Open the link to your new CRM e.g. <http://admin.youragency.com.au> ensuring you are using  [Mozilla Firefox](#) as your web browser.
2. Enter your email address as your Username and the temporary password emailed to you.
3. Click 'Login'



Log out

How do I logout?

1. Open 'My Account' by clicking on your profile picture next to the universal search bar. Click 'Logout'



Accessing Your Profile

How do I access my profile?

There are two ways to access your profile:

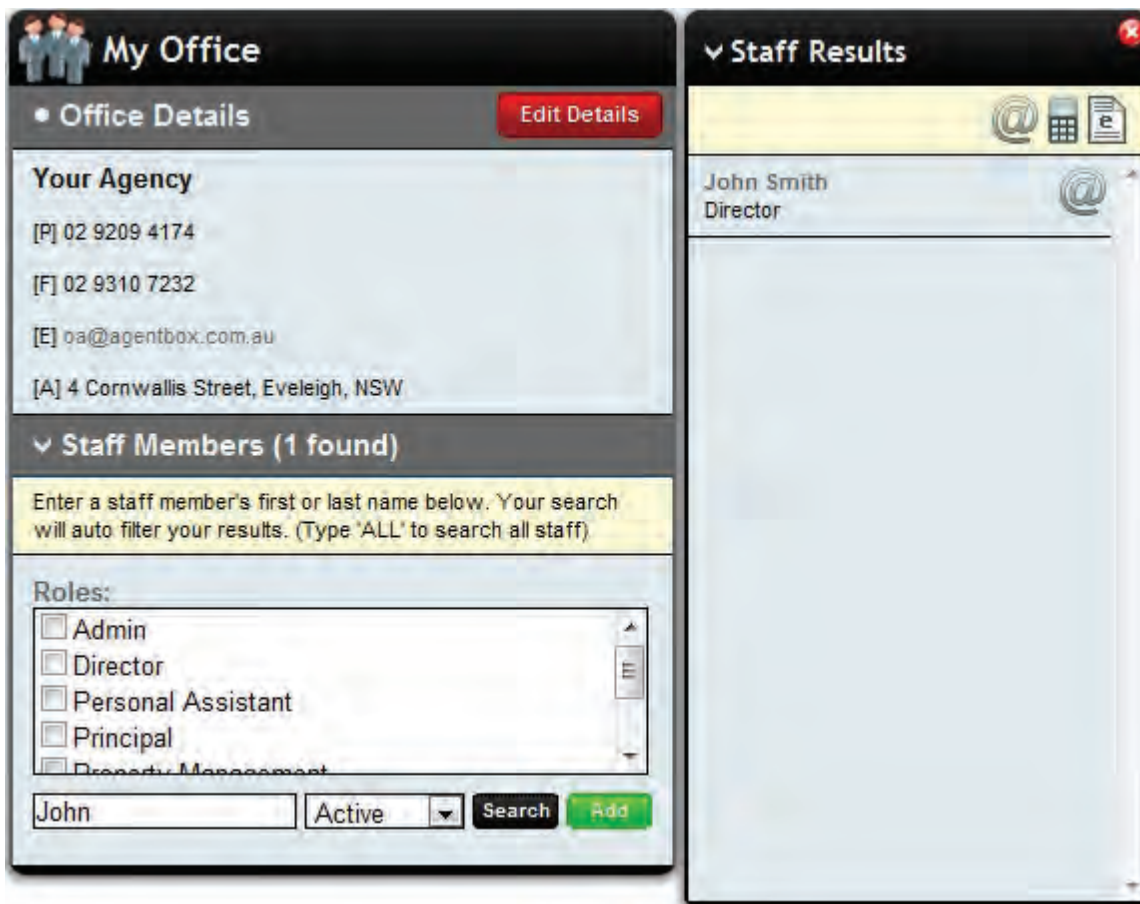
- Through My Office
- Through the Universal Search Bar

My Office

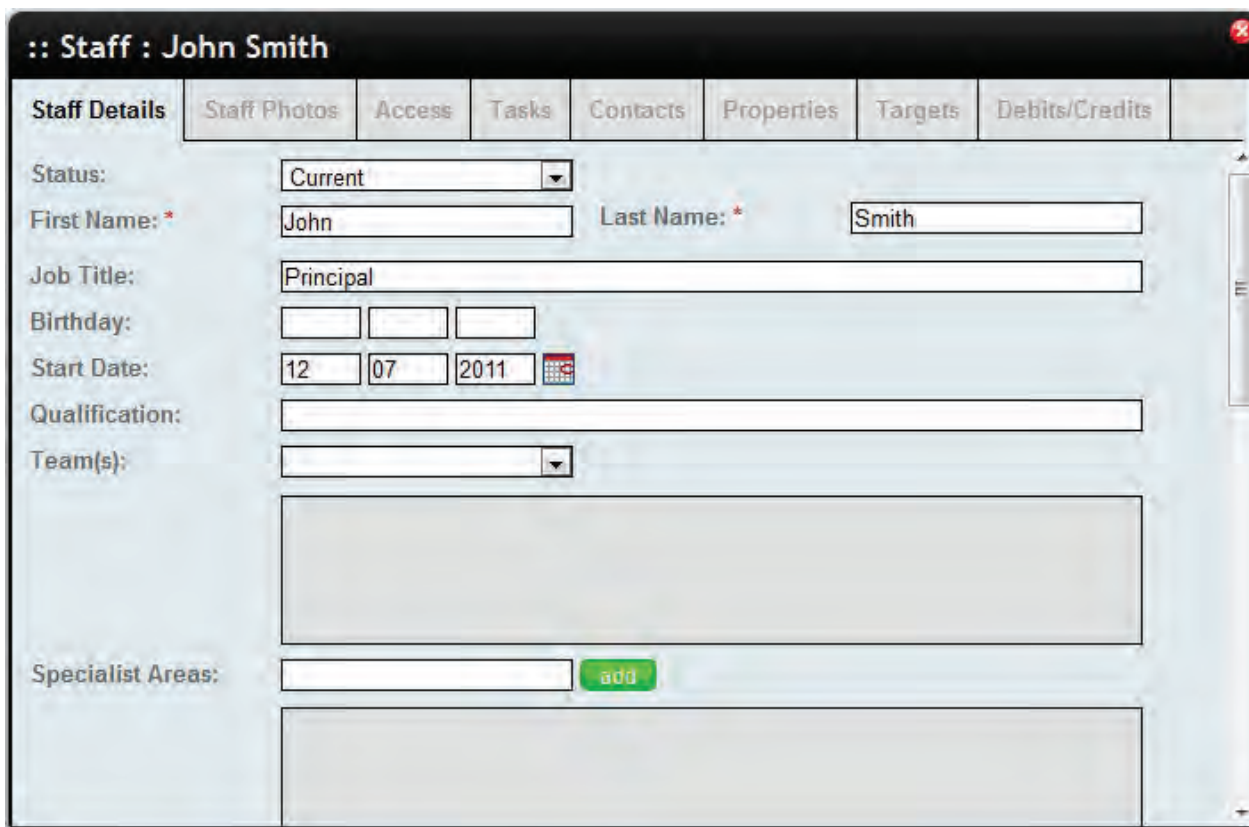
1. Click on the My Office icon from the Main Menu



2. Enter your First name or Surname
3. Click Search

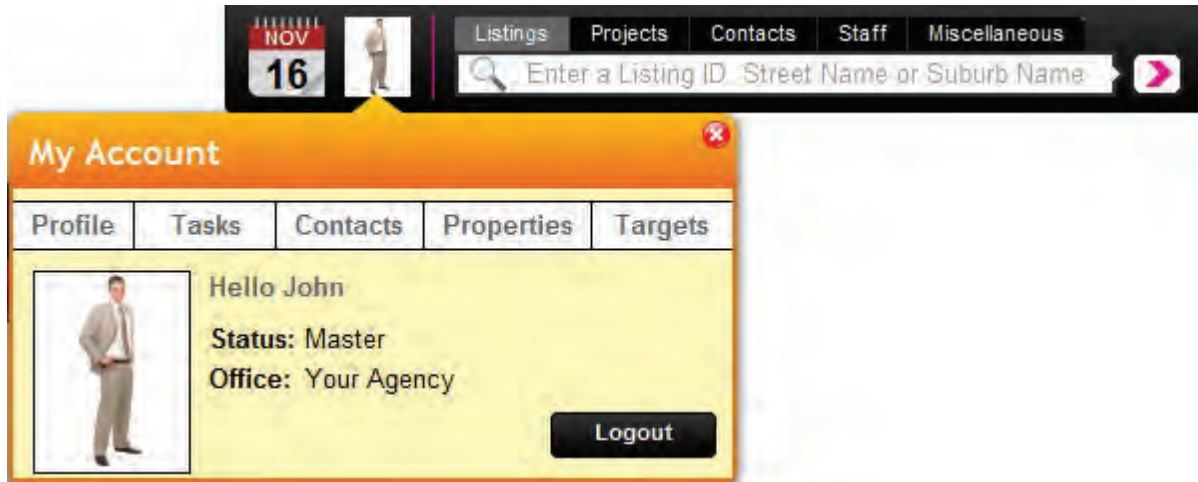


4. Click on your name from the [Quick Finds Results Panel](#).

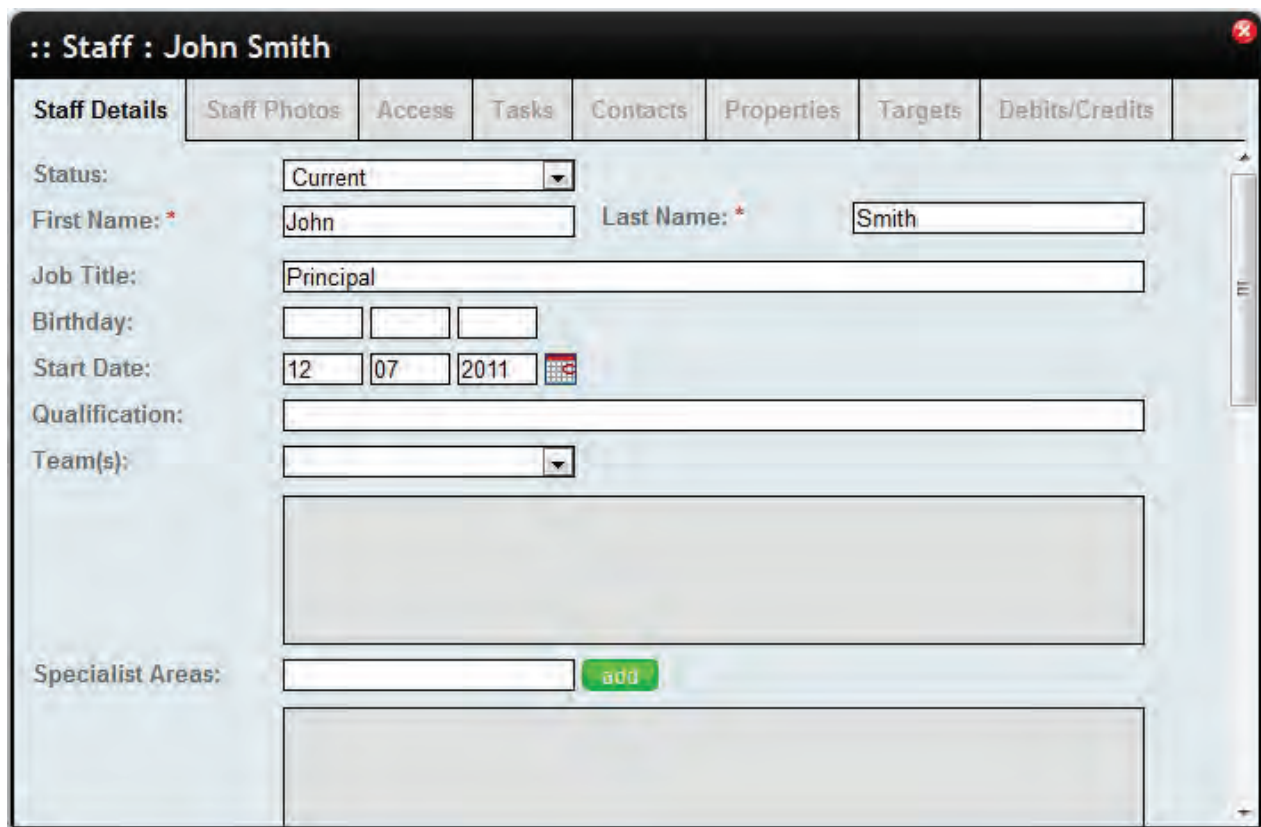


Universal Search Bar

1. Click on your profile picture located on the Universal Search Bar



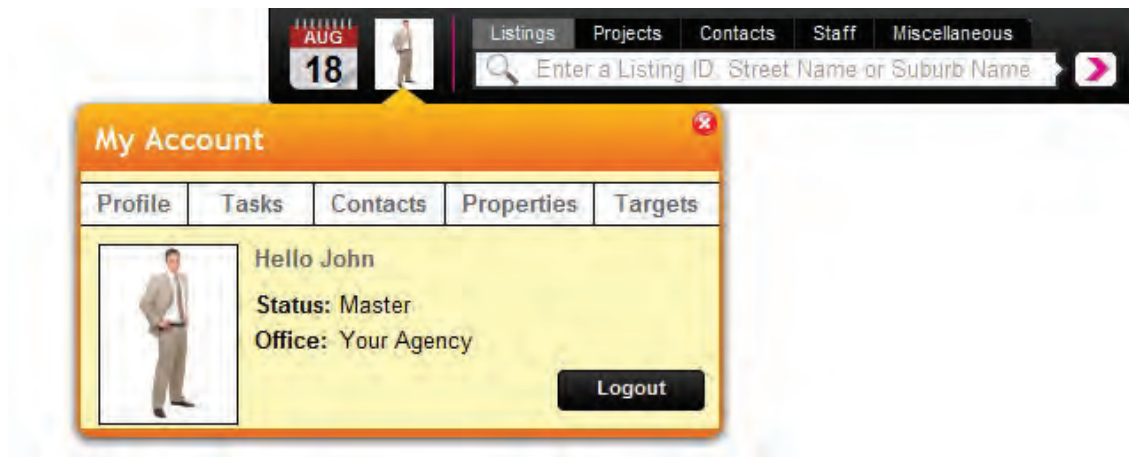
2. Click on the Profile tab



Change Password

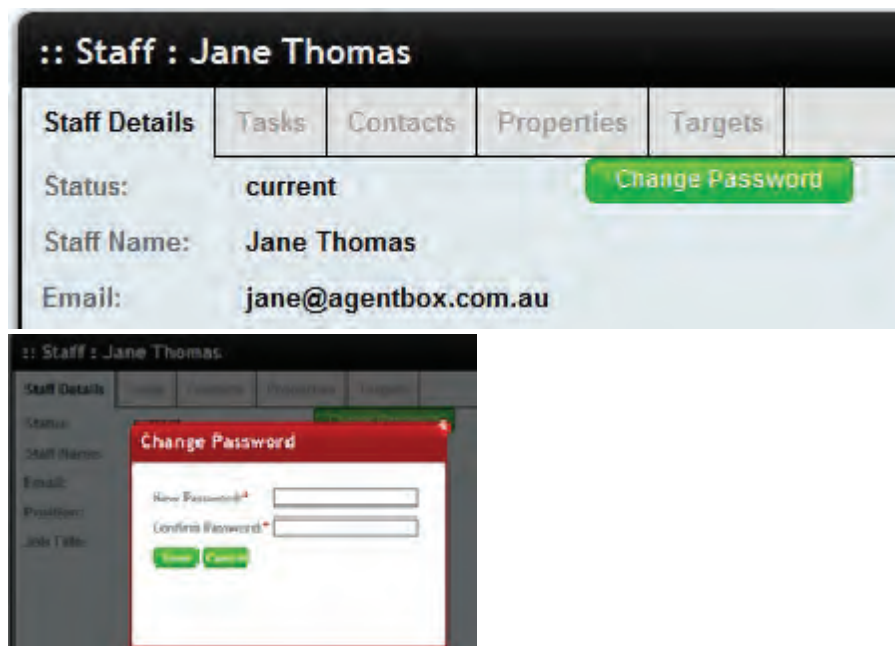
How do I change my Password?

1. Click on your Profile Picture next to the [Universal Search Bar](#)
2. When 'My Account' Loads, Click on "Profile"



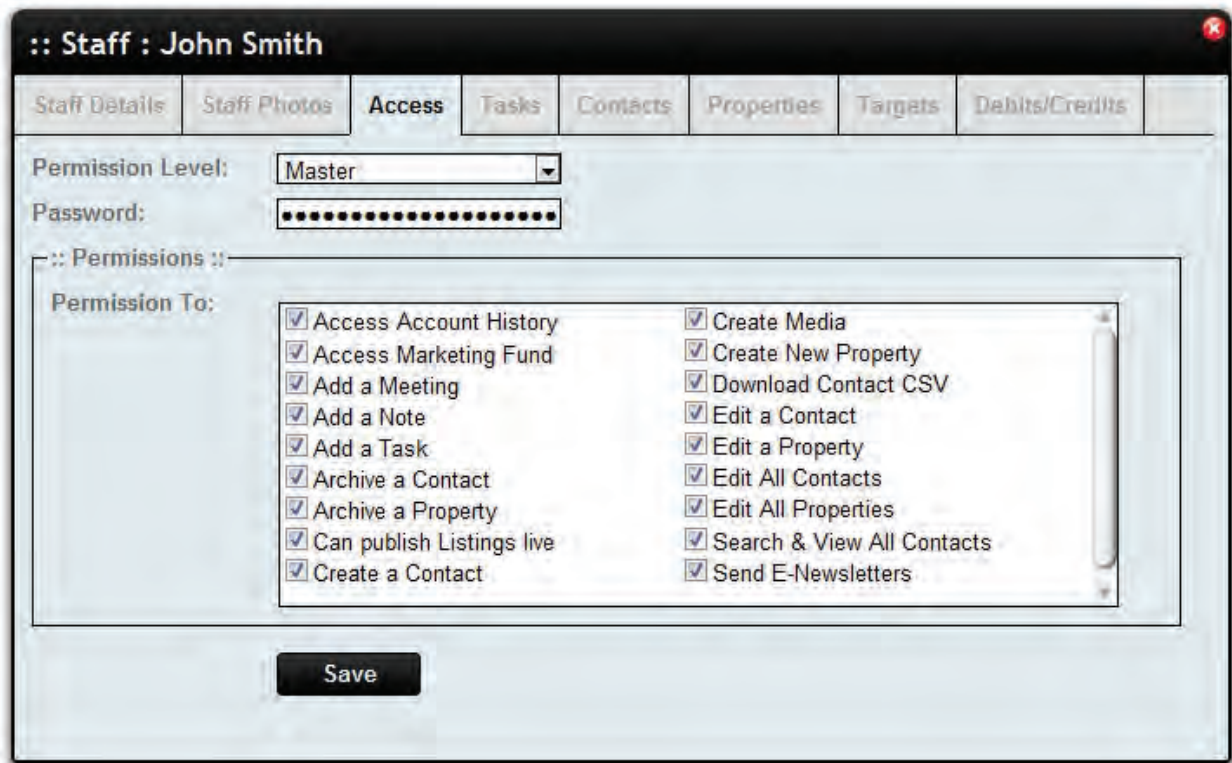
Standard User

1. Repeat steps 1 & 2 above
2. Click on the green 'Change Password' button
3. Enter a new password and click "Save"



Master User

1. Repeat steps 1 & 2 above
2. When your staff card opens click on the 'Access Tab'
3. Enter a new password and click "Save"



Forgot Password

I Forgot My Password

1. If you have forgotten your password click "Forgot Password" on the login page.
2. Enter your login email address and click "Submit"
3. A temporary password will be emailed to your email address

**Note: To activate the new password you must go through the log in link in the email.*

My Admin

▼ Login

Username:

Password:

▼ Forgot Password?

Email Address:

The Dashboard

The Dashboard

Your Agentbox system revolves around the Dashboard. To help you familiarise yourself with your Dashboard, follow the topics below.

[Introduction to Dashboard](#)

[Panels](#)

[Help and Support](#)

[The Main Menu](#)

[The Universal Search Bar](#)



Introduction to Dashboard

Introducing the Dashboard

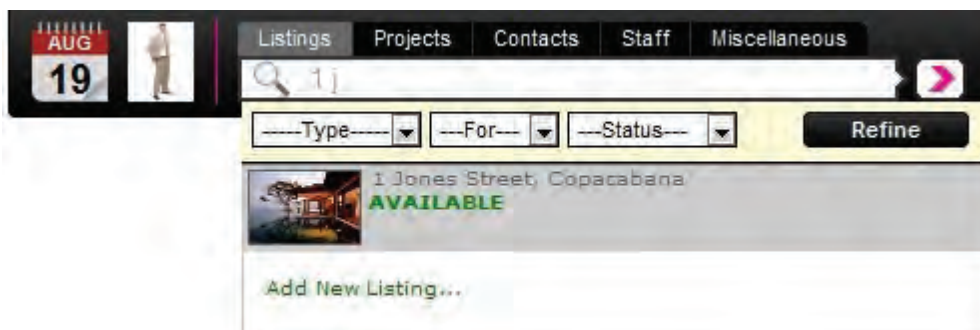
1. [Universal Search Bar](#) - Quickly search and access your properties, projects, contacts and staff using a minimum 3 character search.
2. [Main Menu](#) - You can access the various sections of the database via the 'Main Menu'
3. [Panels](#) - They system is made up of different panels e.g. each main menu item will open up the matching 'Left Panel'
4. [Help and Support](#) - The Help and Support icons take you to your help manual, system release notes and Agentbox Support contact details.



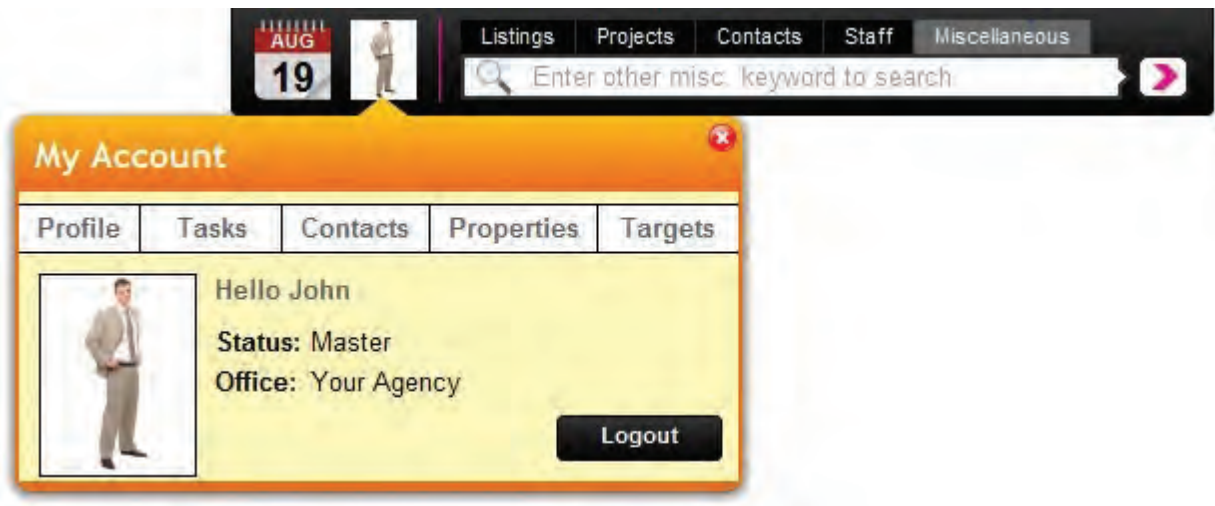
The Universal Search Bar

The Universal Search Bar

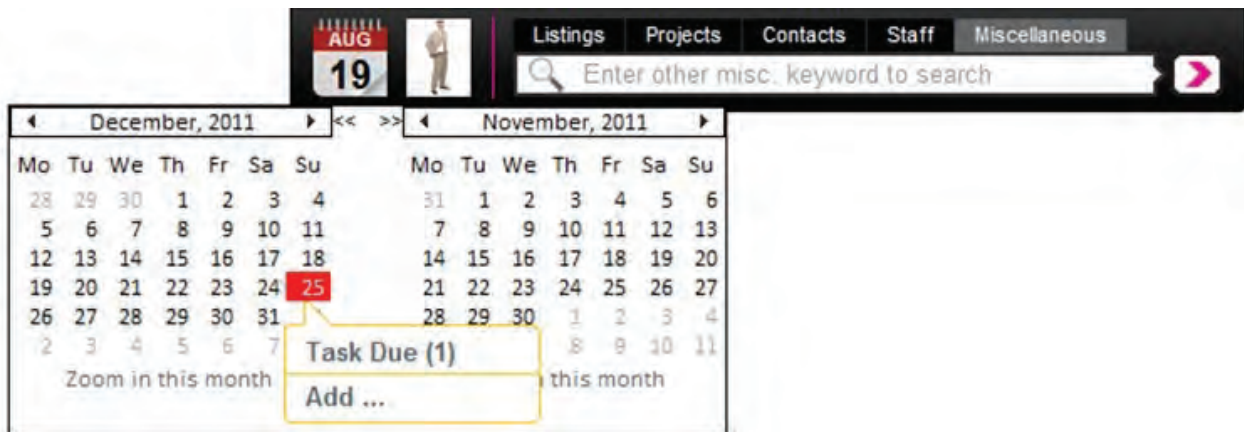
1. Quickly search and access your properties, projects, contacts and staff using a minimum 3 character search.



2. Open 'My Account' by clicking on your profile picture to access your profile, tasks, contacts, properties and targets. You can also logout here.



3. Quickly access your calendar to view upcoming meetings or tasks or to add in a new meeting or task.



The Main Menu

The Main Menu



You can access the various sections of the database via the Main Menu, each menu item will open up a corresponding Left Panel.

[My Office](#)

In My Office you can edit the office contact details which will update the website, letters, e-newsletters and brochures. You can add/edit staff and their details which will also update the website and media, delete staff members and reassign their tasks, properties and contacts, communicate to staff via email, e-newsletters or SMS and much more

[Properties](#)

In Properties you can add/edit your listings, appraisals, prospects and create projects. Add OFI time, log enquiries and feedback from OFI's create inspection/vendor reports, create brochures, letters and e-newsletters, conduct advanced searches and print reports and much more

Contacts

In Contacts you can add/edit your contacts, run advanced searches to send bulk communications e.g weekly e-newsletters, mail merges or create reports, send emails e-newsletters and SMS direct to a contact, log property feedback from an inspection by appointment, update/edit their property requirements, create tasks and add notes, view their related properties and properties they have inspected and much more

Tasks

In Tasks you can view your current, upcoming, overdue and completed tasks. You can print a report, bulk complete, create a task, or apply an activity schedule. You can also add or edit an activity schedule template and much more.

Website

In Websites, Master users can edit text, feature properties, re-order staff add/edit testimonials and much more on their website.

Reports

In Reports you can generate stock list and open home reports, pipeline reports, lease and sales reports, property, contact, performance reports and much much more.

Performance

In Performance Master users can view the office performance and individual agent performance in a snapshot. Regular users can view their own performance figures.

Panels

Introducing the Panels

The system is made up of separate panels for easy navigation and the ability to overlap.

[Left Panel](#)

[Fast Find Results Panel](#)

[Main Panel](#)

[Right Panel](#)

Left Panel

Left Panel

There are two uses for the left panel, the first is for searching and navigation and the second is to provide additional data and options when working on a property or contact in full view mode.

1. If you select an item from the main menu, the corresponding left panel will open.

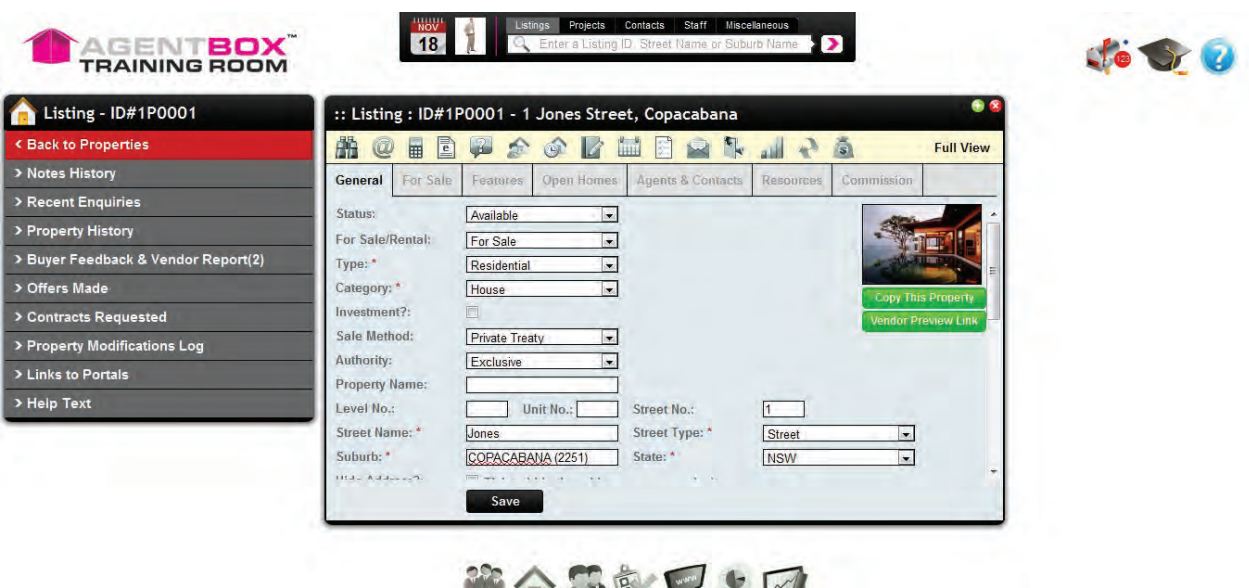
For example, click on Properties from the main menu



the matching property left panel will open.



2. The second use for the left panel is to store notes, history and provide additional functionality when working with contacts and properties. For example, If you open up a property card (main panel) and click full view in the top right corner, the left panel will contain information specific to that property.

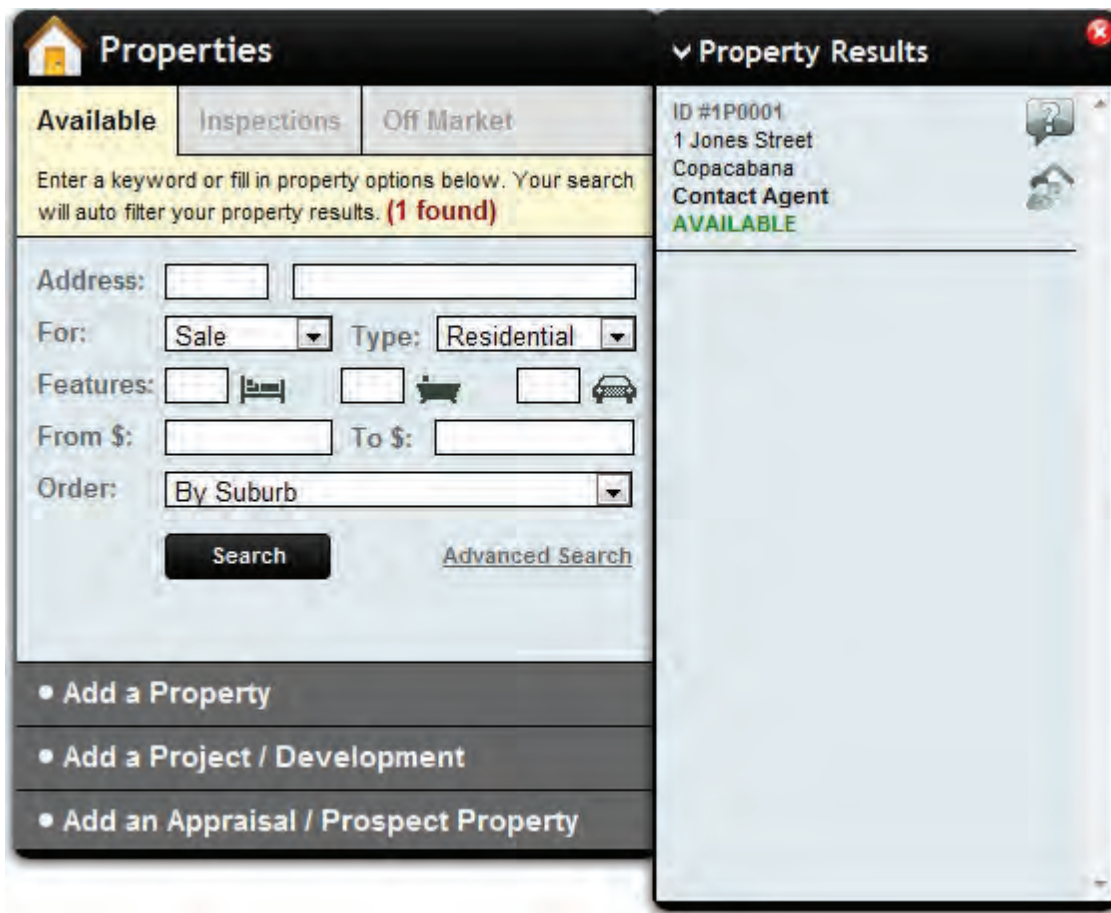


Results Panel

Quick Finds Results Panel

The results panel will appear if you search for a staff member, contact or property using the left panel. The results panel also offers Action Icons to quickly communicate or work with the search results.

In the property example below, you can quickly log and enquiry or match buyers to a property using the action icons.



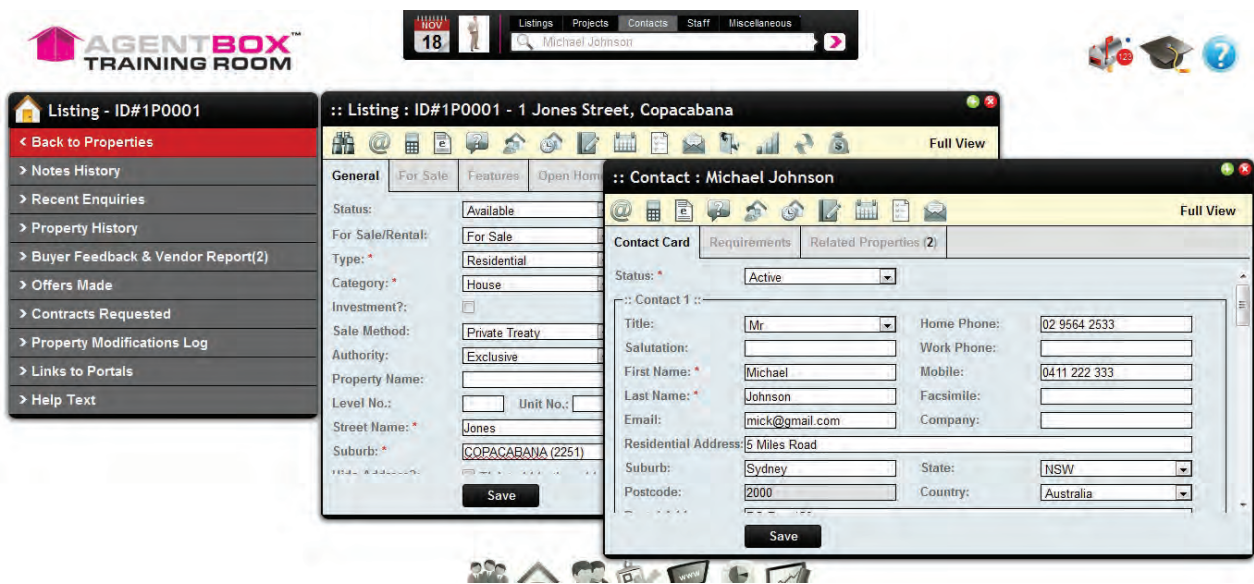
Centre Panel

Centre Panel

The centre panel contains the main item you are working on and allows you to overlap e.g. you can have a property and contact card open at the same time.

In this example we have opened a property card, then opened a contact on top using the [Universal Search Bar](#) to retrieve the contact.

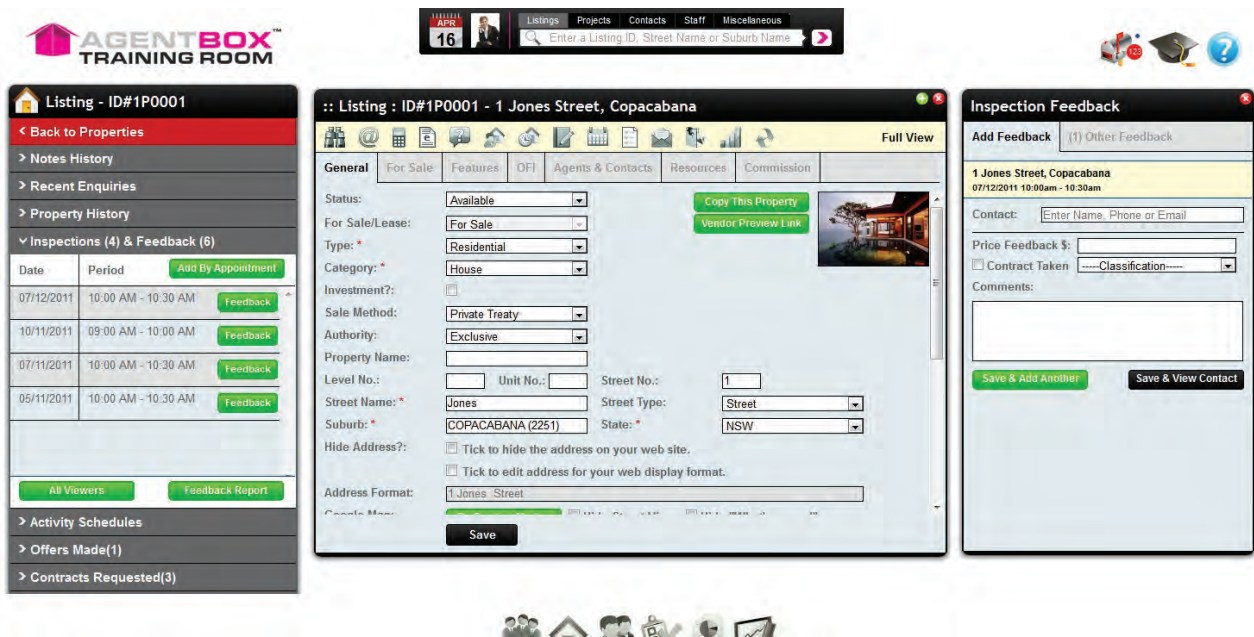
To open up the matching left panel for the contact, we would need to click 'Full View' on the contact centre panel.



Right Panel

Right Panel

The right panel provides space for additional functionality. In this example we have opened up the Inspection Feedback tool which has opened in the far right panel.



Help and Support

Help and Support



If you need further assistance feel free to contact our Support desk.

Mailbox - This is where you will find communications and release notes from Agentbox

Training Hat - This is where you can access training materials

Help & Support - This area contains our help desk contact details and useful software download links.

My Office

My Office



In 'My Office' Master users can add/edit/archive staff members. Edit the office contact details, request new portals etc.

[How do I edit the Office contact details for letters, website, e-newsletters and digital media?](#)

[How do I log additional office income? - For Franchise reporting only](#)

[How do I add office supplier items for agent debit/credits?](#)

[How do I add/edit staff members?](#)

[How do I delete/archive a staff member?](#)

- [How do I transfer properties, tasks and contacts to a different staff member?](#)

[How do I change my password?](#)

[How do I communicate to other staff via sms or email?](#)

[How do I request a new portal feed?](#)

[How do I view portal logs?](#)

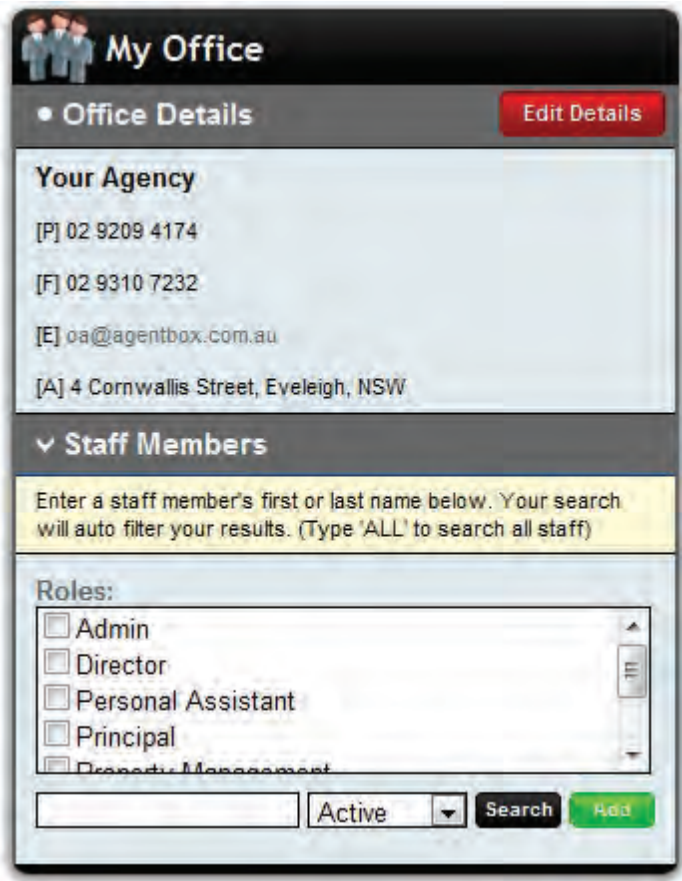
Office Details

How do I edit the Office contact details for letters, website, E-Newsletters and digital media?

1. Click on My Office from the main menu.



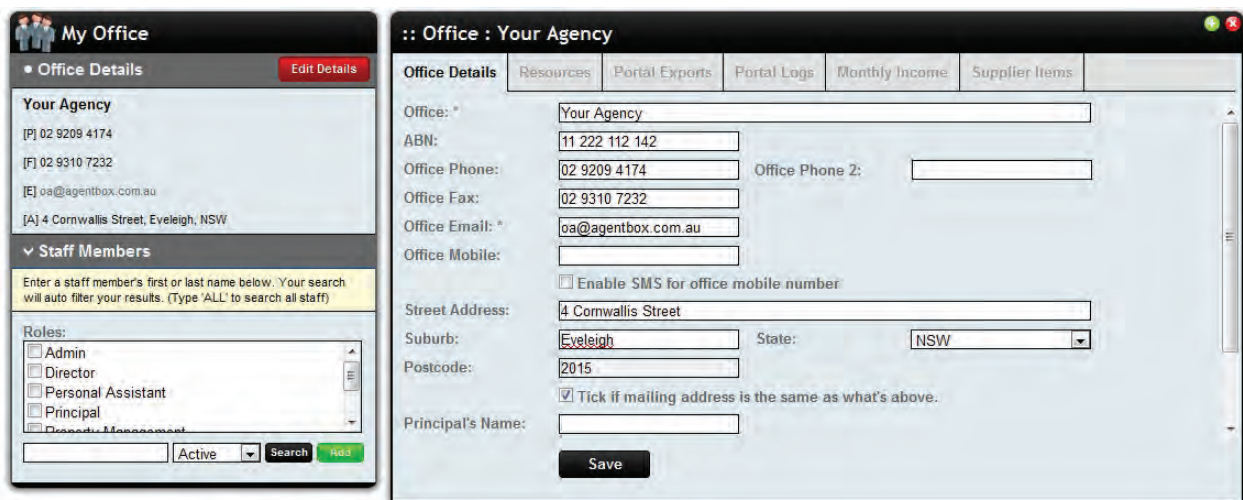
2. Click on the red Edit Details button on the [Left Panel](#)



3. Add or Edit the office contact details on the Office Details tab

4. Click Save

**Note: If ticked, Enable SMS for office mobile number will allow users with access to send SMS the ability to select if they would like to send from their mobile number or the office mobile number.*



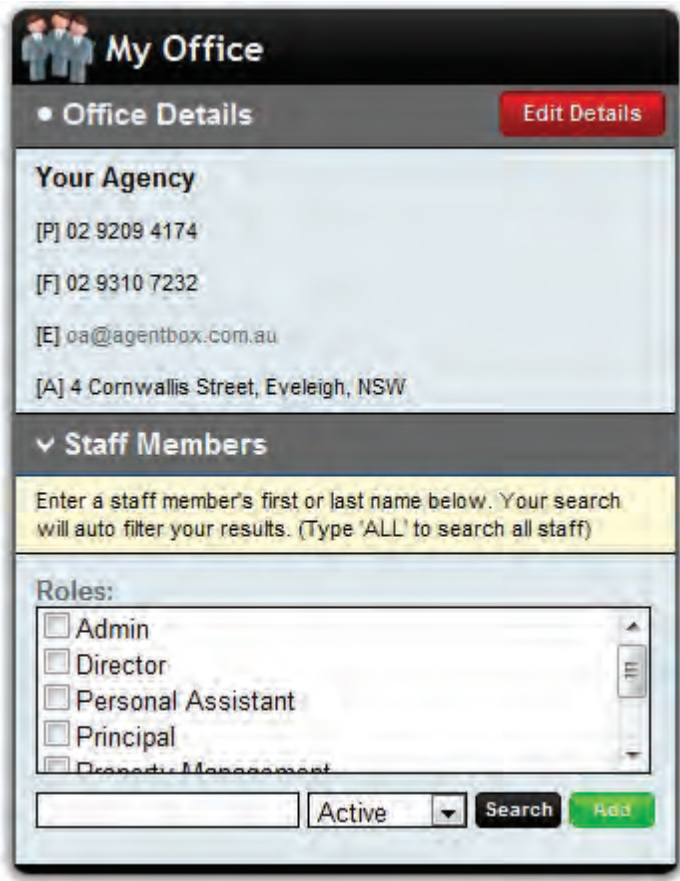
Additional office income

How do I log additional Office income?

1. Click on My Office from the main menu.

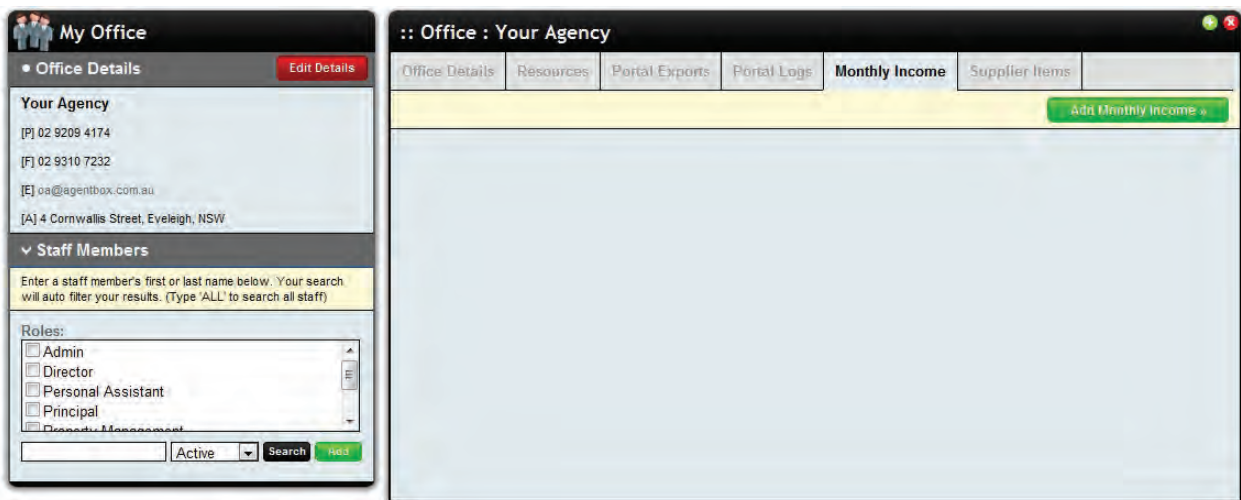


2. Click the red Edit Details button on the [Left Panel](#)



3. Click on the Monthly Income tab

4. Click the green Add Monthly Income button.



4. Enter the income information

5. Click Save

Office supplier items

How do I add/edit office supplier items for agent debit/credits?

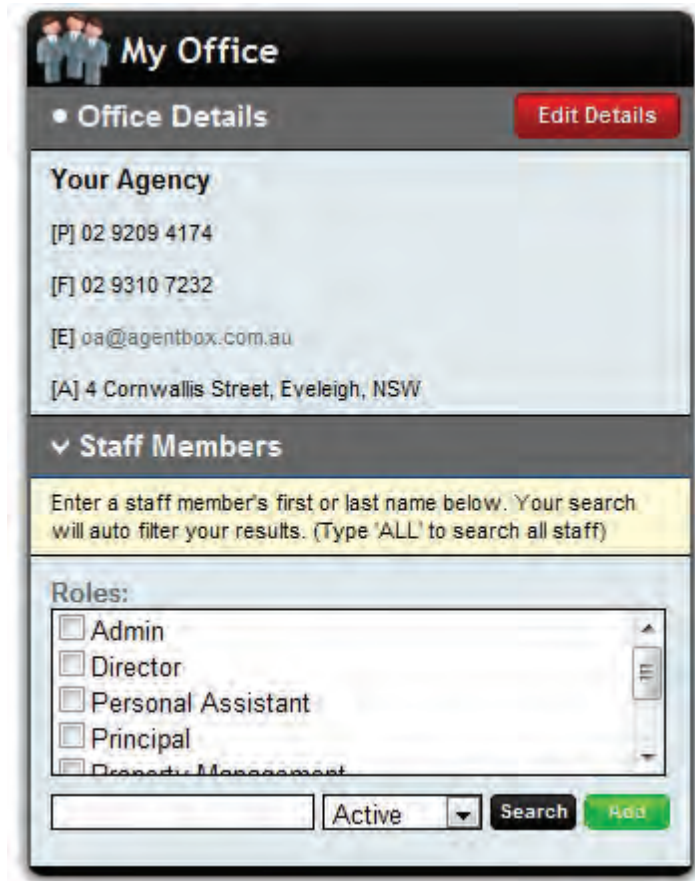
You can add office supplier items that can be [applied to a staff member](#) as a debit or credit. We can then design a custom payment summary report for your office which will combine the commissions earned and the debits and credits applied to a staff member during a certain period of time.

If you would like a custom payment summary report please contact support@agentbox.com.au for a quote.

1. Click on My Office from the main menu.



2. Click the red Edit Details button on the [Left Panel](#)



3. Click on the Supplier Items tab
4. Enter in the new item details and hit save or hit the green edit button to edit an existing item

:: Office : Your Agency : New Item

Office Details | Resources | Portal Exports | Portal Logs | Monthly Income | **Supplier Items**

Existing Items

Name: Advance Paid , Price: 500 , Debit/Credit: Debit [Edit](#)

Item Name: *

Price: *

Debit/Credit: Debit

Comment: *

Save

Add/Edit Staff

How do I add/edit staff members?

1. Click on My Office from the main menu.



2. Click on the green Add button on the [Left Panel](#) and the staff card will appear.

The screenshot shows a web interface titled "My Office". At the top left, there is a logo with three people icons. Below the logo, the text "My Office" is displayed. Underneath, there is a section titled "Office Details" with a red "Edit Details" button to its right. The "Office Details" section contains the following information:

- Your Agency**
- [P] 02 9209 4174
- [F] 02 9310 7232
- [E] oa@agentbox.com.au
- [A] 4 Cornwallis Street, Eveleigh, NSW

Below the "Office Details" section is a section titled "Staff Members" with a downward arrow icon. Underneath this section is a yellow box with the text: "Enter a staff member's first or last name below. Your search will auto filter your results. (Type 'ALL' to search all staff)". Below the yellow box is a section titled "Roles:" with a list of roles and checkboxes:

- Admin
- Director
- Personal Assistant
- Principal
- Property Management

At the bottom of the "Staff Members" section, there is a search bar, a dropdown menu set to "Active", a "Search" button, and a green "Add" button.

3. Fill in the Staff details (any reference to 'website' below is only relevant if you have an Agentbox website and if they are dependent in the design of that website)

Status: - Office Use Only, if you change the status to deleted you can reassign all contacts, tasks and properties to another staff member.

First Name: * - Public Display - Used on website, letters, e-newsletters etc

Last Name: * - Public Display - Used on website, letters, e-newsletters etc

Job Title: - Public Display - Used on website, letters, e-newsletters etc

Birthday: - Office Use Only

Start Date: - Office Use Only

Qualification: - Office Use Only

Team(s): - You can set up teams then assign staff to a team. If you are assigned to a team and have the correct sharing/editing permissions then you can view/edit fellow team members contacts and properties.

Specialist Areas: - Select and add suburbs. If you have suburb profiles designed into your website, this is how you can link them to your staff profile on the web. (Custom feature).

License/Rego No.: - Office Use Only

Contact No.: - Public Display - Used on website, letters, e-newsletters etc

Expiry Date: - Office Use Only

Mobile: - Optional Public Display - Used on website, letters, e-newsletters, SMS if set up etc

Email: * - Staff member must have their own email as this also acts as the staff members log in user name.

Home Address: - Office Use Only

Role: * - The role is used for staff member searching, ordering on the website and in activity schedule templates

Agent Split %: - This is where you can enter an agents % split with the office for use in commissions.

Website Staff Profile: - Public Display - Used on website

Show on website: - Select what pages, if any, the staff member will show on your website. Whether or not their listings and testimonials will display on their staff profile if applicable and you can also hide the staff mobile from public display.

:: Staff :

Step 1 of 3 - Complete Staff Info

Staff Details | Staff Photos | Access | Tasks | Contacts | Properties | Targets | Debits/Credits

Status:

First Name: * Last Name: *

Job Title:

Birthday:

Start Date:

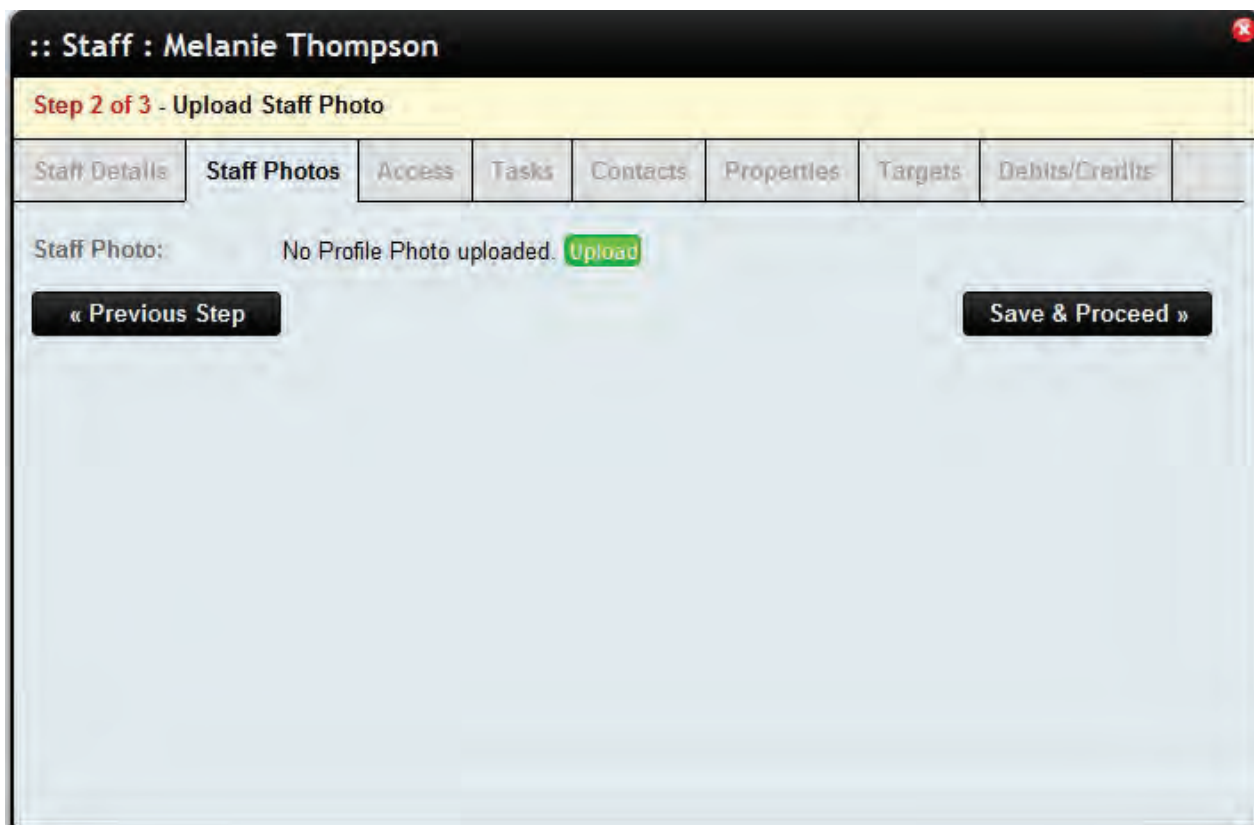
Qualification:

Team(s):

Specialist Areas:

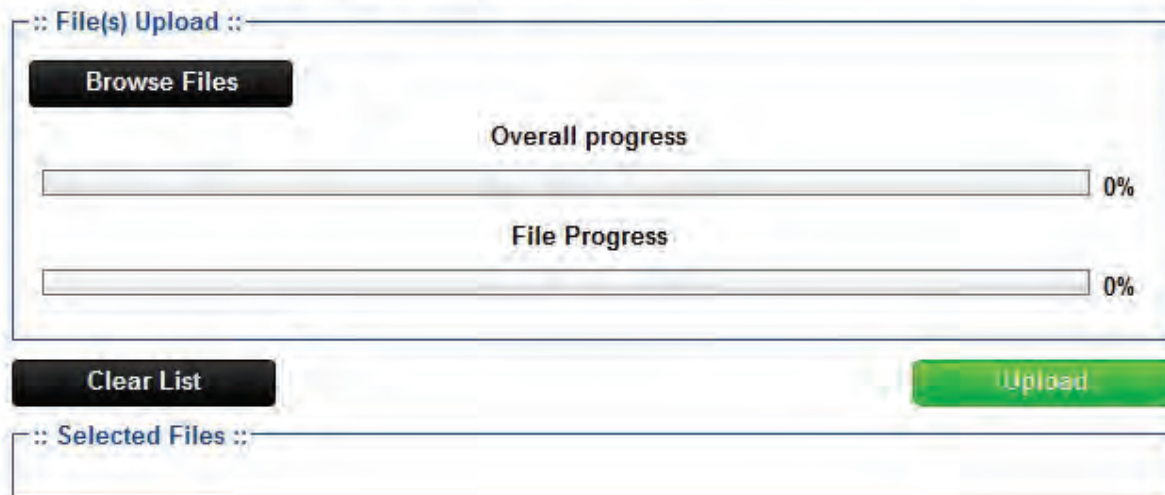
4. Save and Proceed

5. Upload staff photo
o Click Upload

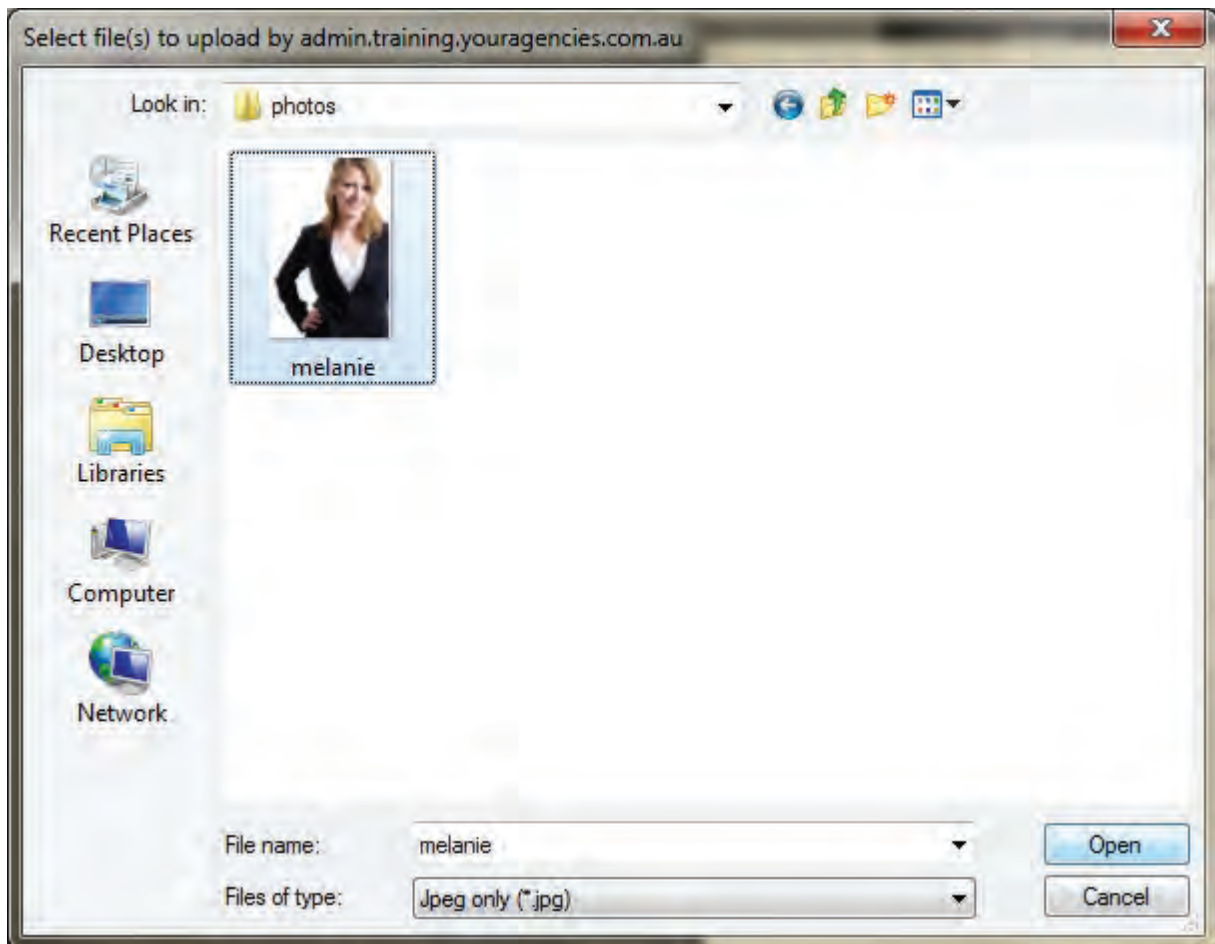


o Click Browse

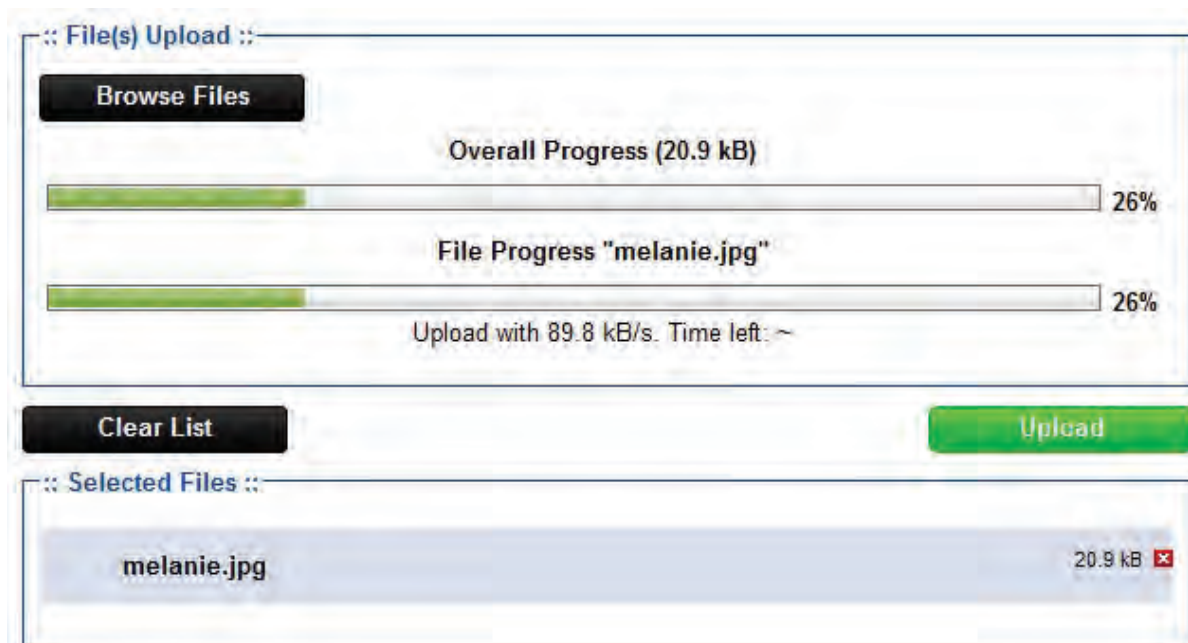
Click the 'Browse Files' button to go and select the files you wish to upload from your local computer. Then select 'Upload' to confirm the files to publish.



o Locate Photo within computer files, click on image then select Open

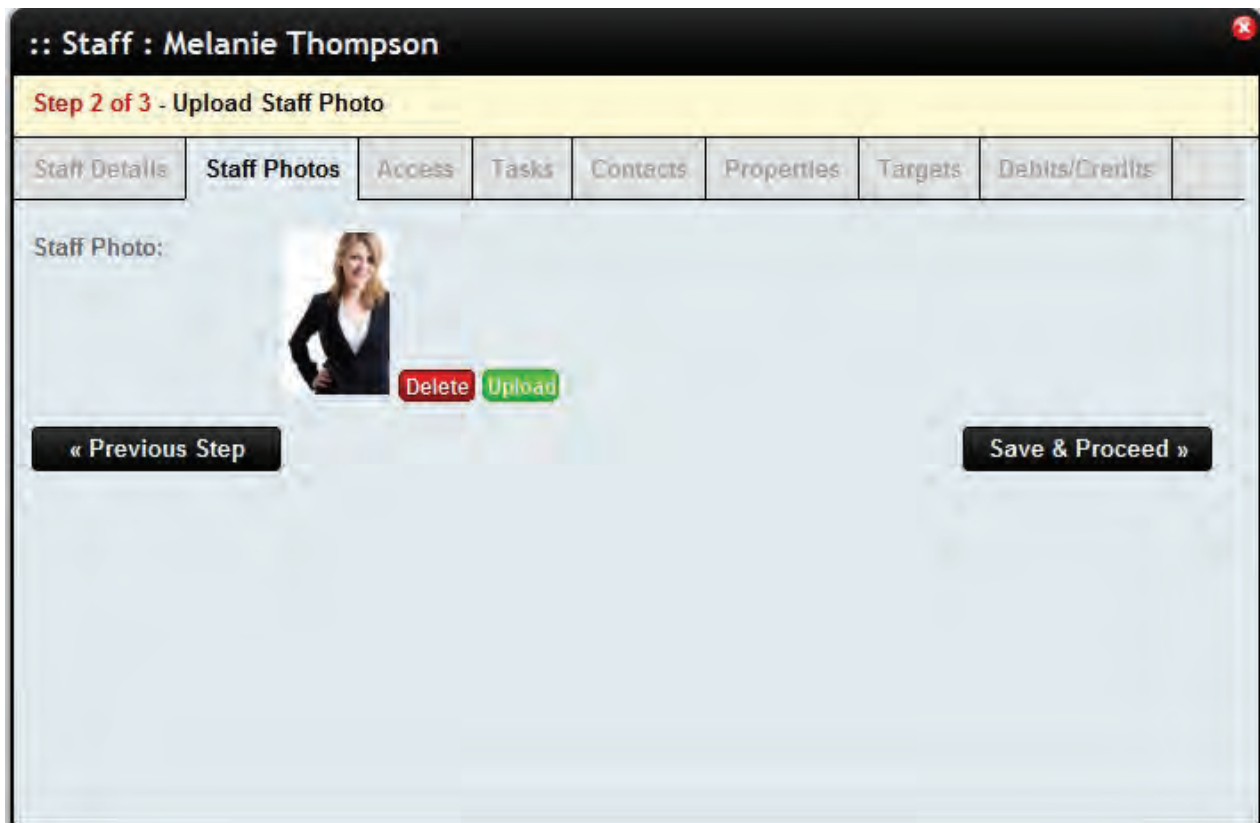


o Click Upload



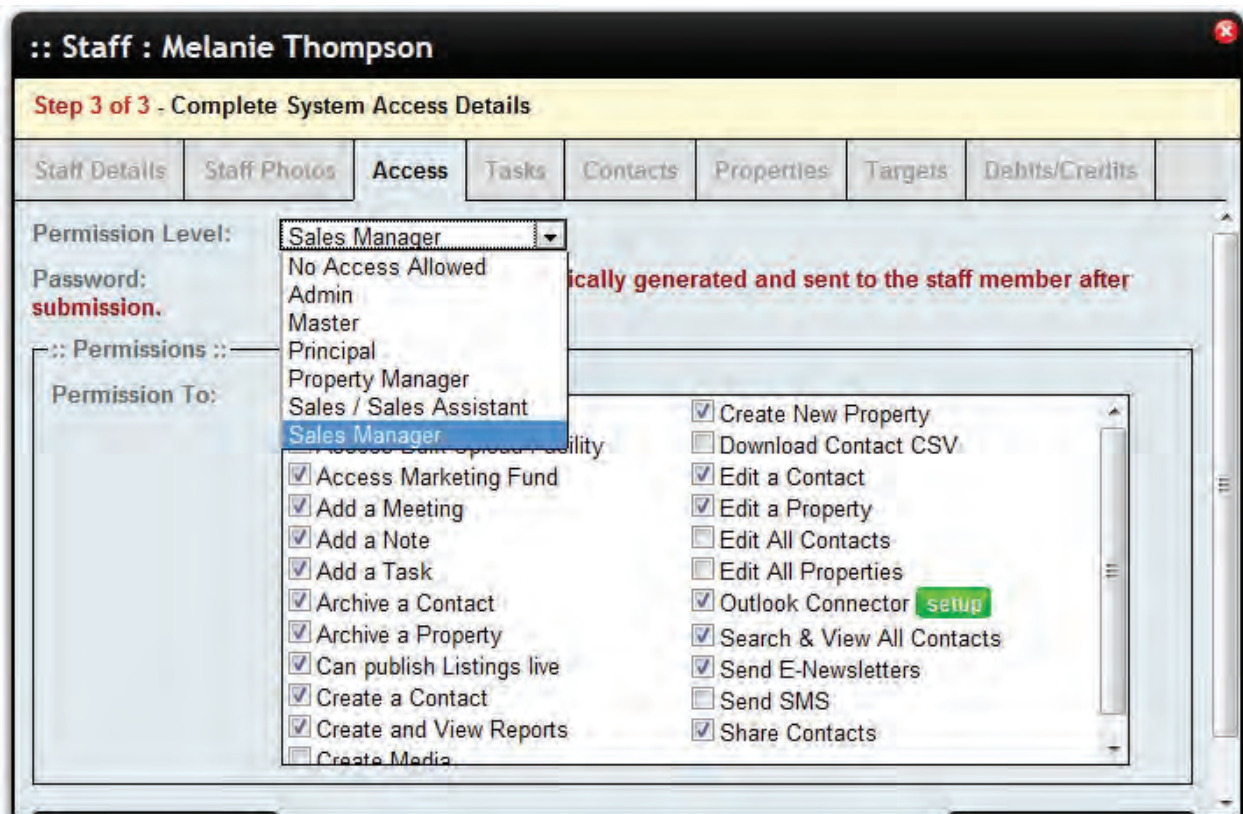
o Once the upload is complete, the upload panel will disappear and you will be directed back to the incomplete staff card displaying the selected photo.

6. Save and Proceed



7. Select a permission level from the drop down and hit save.

**Note: You can specify/adjust access permissions for individual staff by ticking the individual check boxes [Click here](#) to view the permissions overview*



8. Once Access has been allocated click Finish to complete the Staff Member Profile.

**Note: an email is sent to the agent using the email specified on the Staff Details tab with their user name and password. To activate this password the user will need to follow the link in the email.*

9. After you click Finish, the panel with refresh and will present you with 5 new tabs: [Tasks](#), [Contacts](#), [Properties](#), [Targets](#) and [Debits/Credits](#)



10. You can come in at any time and click on the [Contacts](#) tab to view contacts assigned to the staff member.









:: Staff : Melanie Thompson : List Contacts(2 contacts found)							
Staff Details	Staff Photos	Access	Tasks	Contacts	Properties	Targets	Debits/Credits
Sort By: Contact Name: A-Z				[Icons: Envelope, Refresh, Calculator, Document, Printer]			
Contact	Assigned Staff	Last Contacted	Contact Info				
Colin Fairlight	Melanie Thompson		@	[Icon]			
Sarah Turner	Melanie Thompson		@	[Icon]			

11. Click on the [Properties](#) tab to view their related Properties

:: Staff : Melanie Thompson : List Properties(2 properties found)

Staff Details | Staff Photos | Access | Tasks | Contacts | **Properties** | Targets | Debits/Credits

Sort By:  

	 3  2  1	ID #1P0003 SOLD	52 Elizabeth Street, Surry Hills Thomas Train (Vendor)	Contact Agent
	 3  2  2	ID #1P0002 OFFLINE	Unit 6/12 Del Rio Drive, Copacabana Michael Johnson (Vendor)	Offers over \$950,000

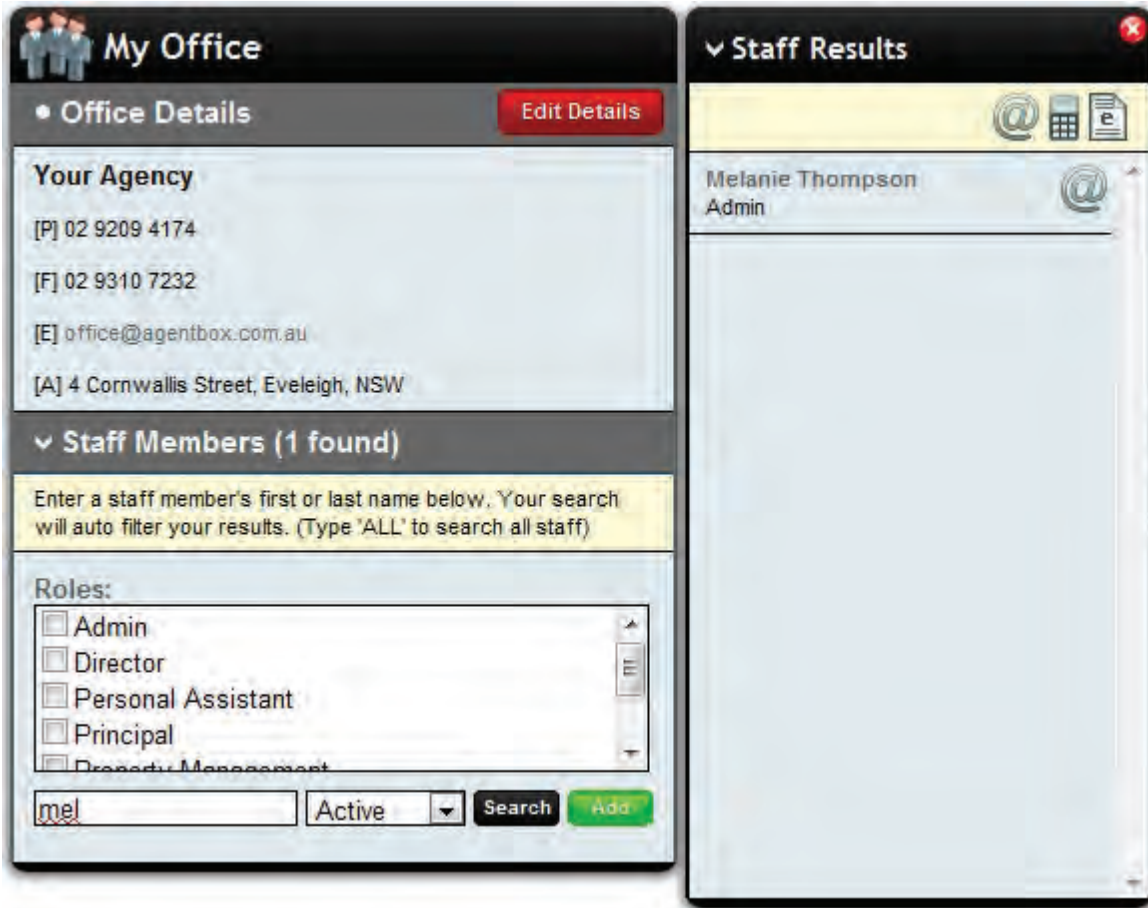
Staff Targets

How do I add/edit staff targets?

1. Click on My Office from the main menu.



2. Type the staff member's name on the [Left Panel](#) and the staff member will appear on the staff results panel.



3. Click on the staff members name to open their staff card
4. Go to the Targets tab and enter Gross Commission, No. of Listings and No. of sales targets for the month and hit save.
To delete a target - un-tick the check box and hit save

:: Staff : Melanie Thompson

Staff Details | Staff Photos | Access | Tasks | Contacts | Properties | **Targets** | Debits/Credits

Gross Commission: Jan 2012

\$10,000 for Jan 2012

No. of Listings: Jan 2012

4 for Jan 2012

No. of Sales: Jan

- select year
- 2012
- 2011
- 2010
- 2009
- 2008

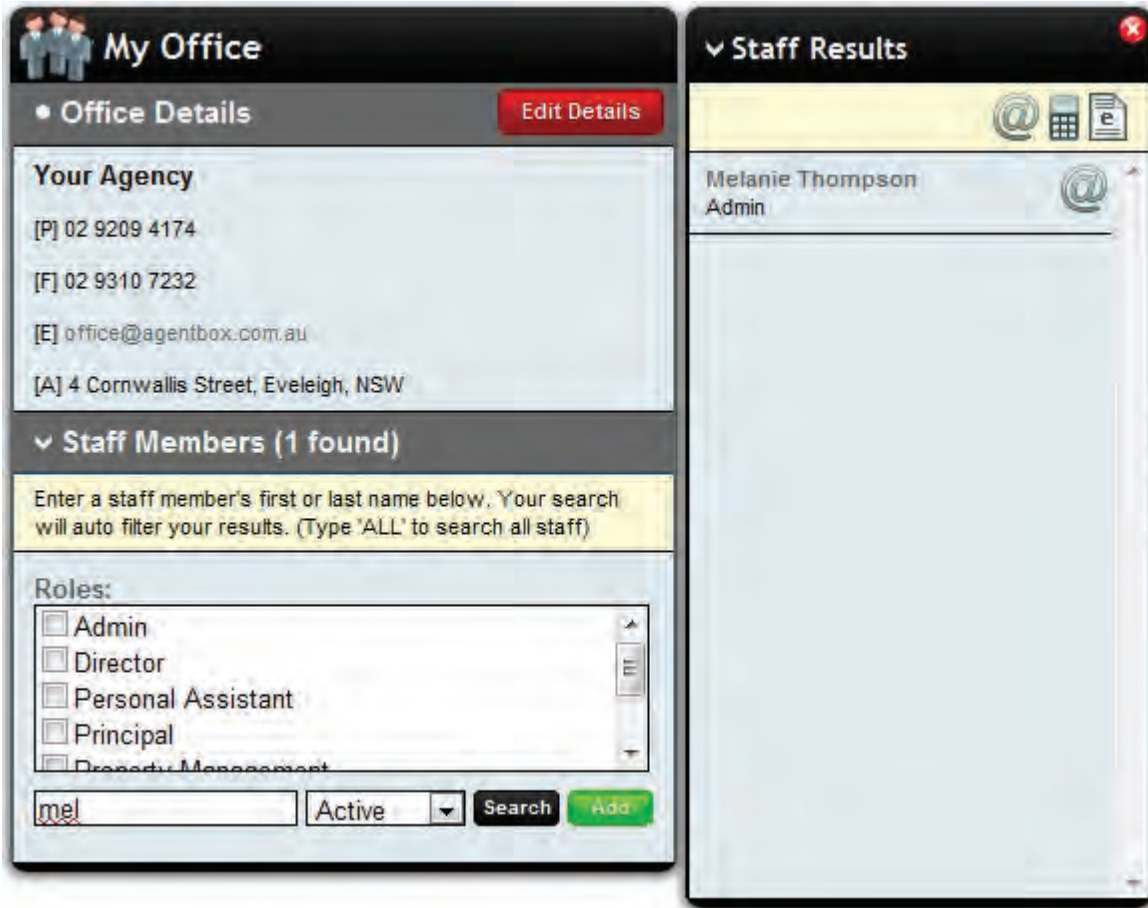
Staff Debit/Credits

How do I apply debits and credits to a staff member?

1. Click on My Office from the main menu.



2. Type the staff member's name on the [Left Panel](#) and to staff member will appear on the staff results panel.



3. Click on the staff members name to open their staff card and click on the Debits/Credits tab



4. Click Add Debit/Credit

5. Enter the Debit/Credit details and select save. [Office Supplier Items](#) can be added in My Office

:: Staff Consumables : Melanie Thompson

Staff Details | Staff Photos | Access | Tasks | Contacts | Properties | Targets | **Debits/Credits**

Date: * 18 / 11 / 2011

Supplier: * Your Agency (Office) ▼

Item: * Advance Paid (\$500.00) ▼

Qty.: * 1

Price \$: * 500

Debit/Credit: Debit ▼

Comment:

6. To print a report click Print, If you would like a customised payment summary report containing a staff members commissions and Debit Credit data then please contact support@agentbox.com.au for a quote.

:: Staff Consumables : Melanie Thompson

Staff Details | Staff Photos | Access | Tasks | Contacts | Properties | Targets | Debits/Credits

[Add Debit/Credit](#)

Date	Supplier	Items	Cost	Debit/Credit
18 Nov 11	Your Agency (Office)	(1) Advance Paid	\$500.00	Debit

[Print](#)

View/Delete Staff Tasks

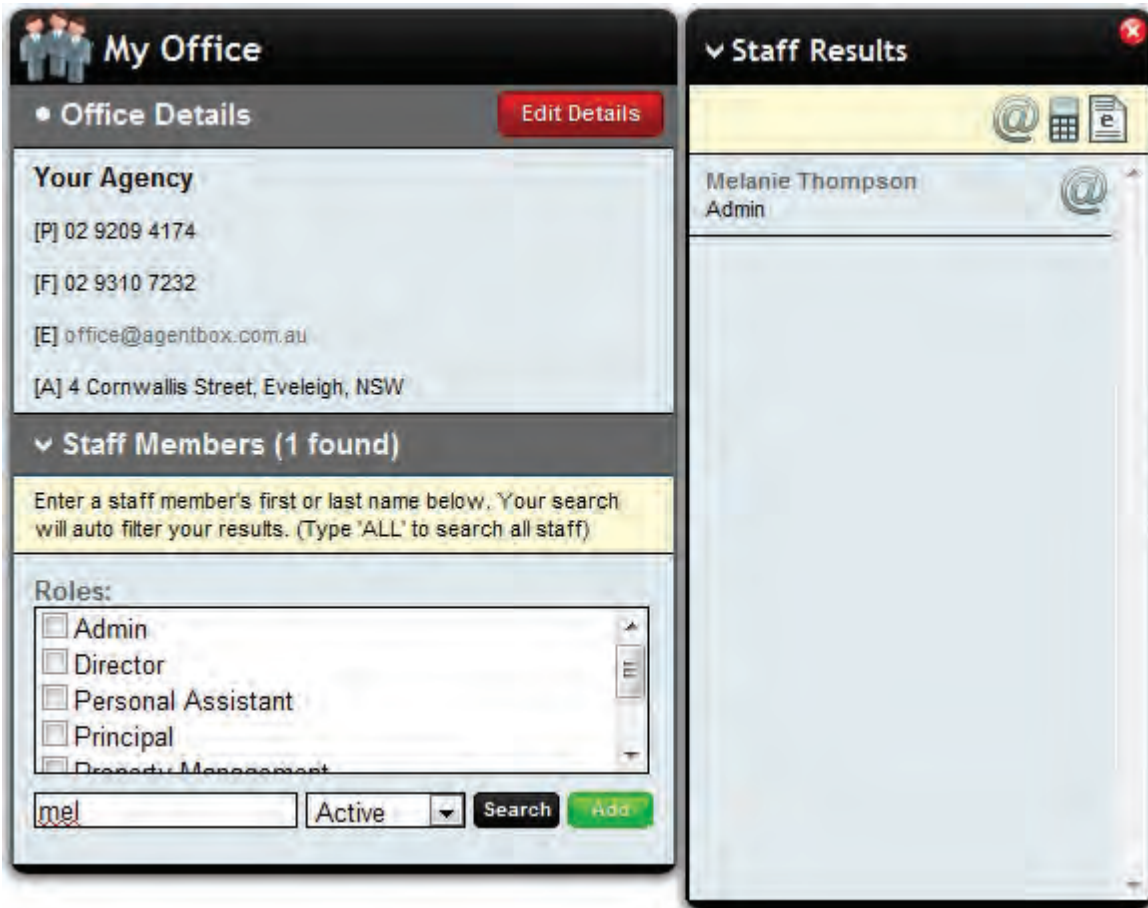
How do I view/delete staff tasks?

A master user can access a staff members tasks via their staff profile. They have the ability to delete a task if necessary.

1. Click on My Office from the main menu.



2. Type the staff member's name on the [Left Panel](#) and to staff member will appear on the staff results panel.



3. Click on the staff members name to open their staff card
4. Click on the Tasks tab and click Delete to remove a task

:: Staff : Melanie Thompson : View Tasks							
Staff Details	Staff Photos	Access	Tasks	Contacts	Properties	Targets	Debits/Credits
Task	Responsible Staff		Due	Done?	Contact(s)	Listing(s)	
Contract Request	John Smith, Melanie Thompson		26/10/11	no	Jack Black	#1P0003	Delete
Buyer Enquiry - Listing ID #1P0001 - 1 Jones Street, Copacabana	John Smith, Melanie Thompson		10/11/11	no	Samantha Jones	#1P0001	Delete
Make a phone call	John Smith, Melanie Thompson		20/11/11	no	Samantha Jones	#1P0001	Delete

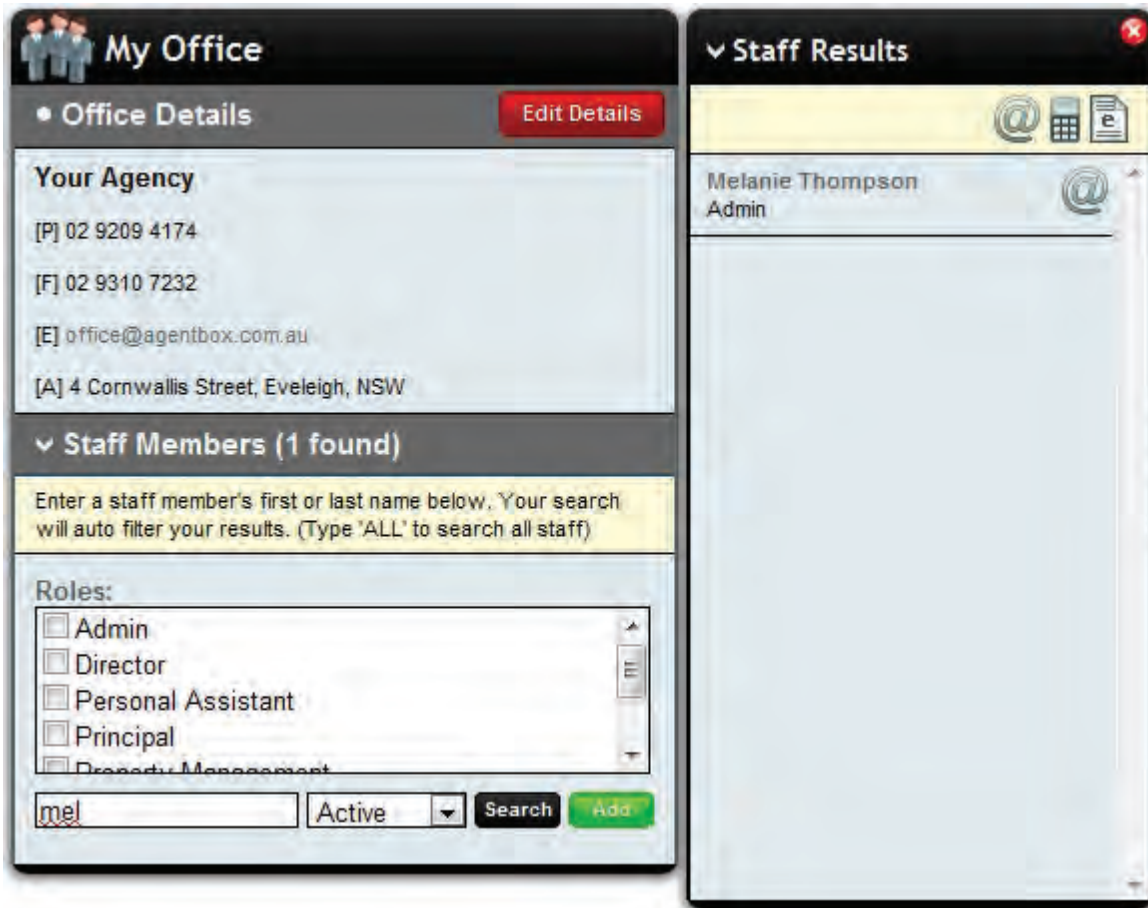
Delete/Archive Staff

How do I delete a staff member?

1. Click on My Office from the main menu.



2. Type the staff member's name on the [Left Panel](#) and the staff member will appear on the staff results panel.



3. Click on the staff members name to open their staff card
4. Select Deleted from the status drop down menu.

**Note: the staff member can be found by selecting Archived from the drop down menu when searching for a staff member.*

:: Staff : Melanie Thompson

Staff Details | Staff Photos | Access | Tasks | Contacts | Properties | Targets | Debits/Credits

Status: (Current, Deleted)

First Name: * Last Name: *

Job Title:

BirthDay:

Start Date:

Qualification:

Team(s):

Specialist Areas:

How do I transfer properties, tasks and contacts to a different staff member?

1. Repeat the above steps and you will be prompted to re-assign all available properties, projects, tasks and contacts.
2. Select the staff member from the drop down menu that you would like to reassign the data to.
3. Click Save

Archive Staff

Please reassign the following to the relevant staff member. (Please note - All leased, sold and offline properties will not be transferred.)

Contacts:

Tasks:

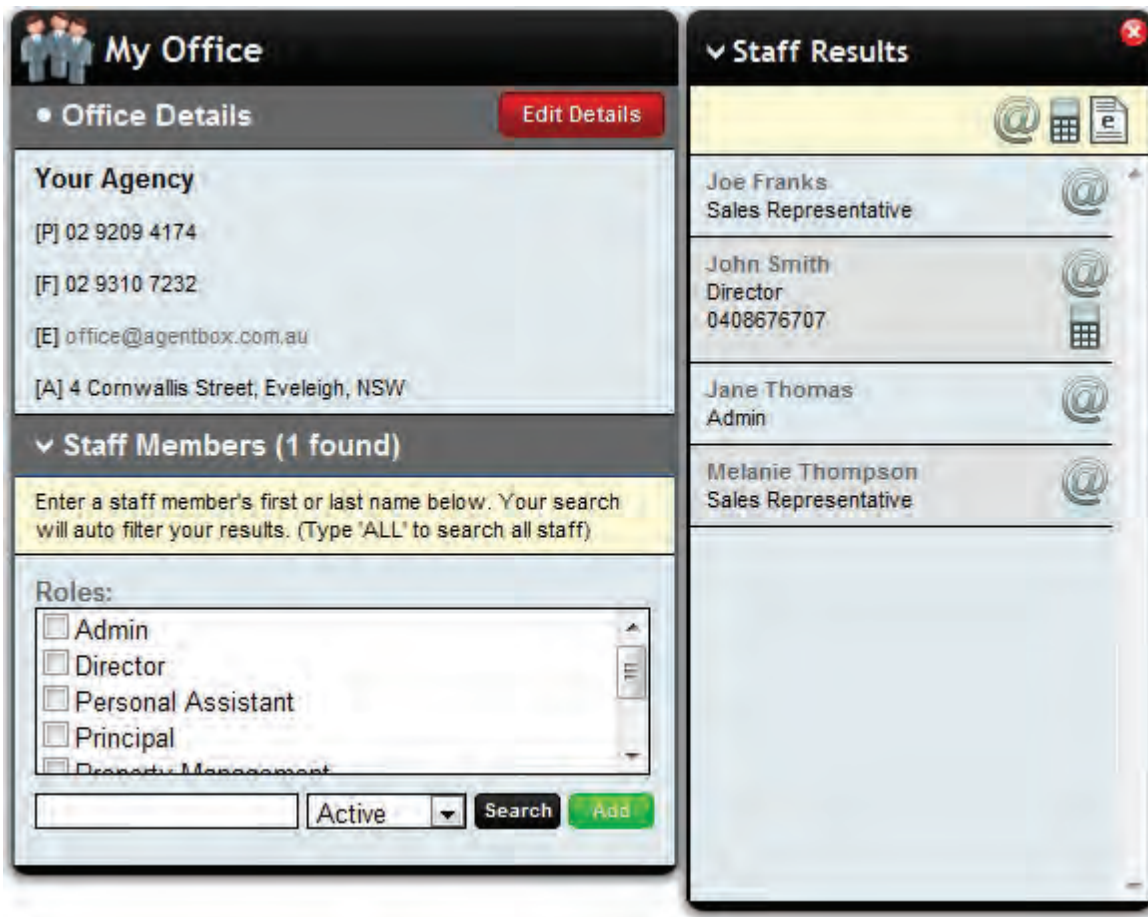
Communicate to Staff

How do I SMS, Email or send an E-Newsletter to staff?

1. Click on My Office from the main menu.



2. Select all staff with a particular role by checking the Role check boxes on the left panel then hit search or to communicate to all staff simply click Search to open the Staff Results Panel.



3. Use the Action Icons at the top of the Staff Results Panel to email, SMS or send and e-newsletter to all staff.

Properties

Properties



In 'Properties' you can add/edit your listings, appraisals and prospects. Run advanced searches etc.

[How do I add/edit a prospect property?](#)

[How do I convert a prospect property to an appraisal?](#)

[How do I add/edit an appraisal?](#)

[How do I convert an appraisal to a listing or mark as missed?](#)

[How do I add/edit a listing?](#)

[How do I change a property status?](#)

[How do I upload property photos, floorplans, documents and links?](#)

[How do I add inspection times to a listing?](#)

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

[How do I add properties to a project?](#)

[How do I search for a property?](#)

[How do I search for a project?](#)

[How do I search for an appraisal property?](#)

[How do I search for a prospect property?](#)

[How do I search for multiple properties?](#)

[How do I print a detailed property report?](#)

[How do I preview a property?](#)

[How do I send a preview of the property to the vendor?](#)

[How do I send an email to related property contacts?](#)

[How do I SMS related property contacts?](#)

[How do I send an e-newsletter via a property? - screen shot + link to how to create an e-newsletter video?](#)

[How do I log property enquiries?](#)

[How do I view all property enquiries?](#)

[How do I communicate to all enquiry contacts?](#)

[How do I match buyers to a property?](#)

[How do I log appointment buyer feedback?](#)

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

[How do I view all notes against a property?](#)

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

[How do I add a task or apply an activity schedule to a property?](#)

[How do I send a letter from a property?](#)

[How do I create sales advise?](#)

[How do I create brochures and window cards?](#)

[How do I view property web hits?](#)

[How do I view portal feed logs for a property?](#)

[How do I log marketing funds and expenses?](#)

[How do I view property history?](#)

[How do I add inspection feedback after an open home/inspection?](#)

[How do I communicate to viewers of a property?](#)

[How do I create a vendor report?](#)

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

[How do I log a contract request?](#)

[How do I view property modifications?](#)

[How do I conduct a Comparative Market Analysis \(CMA\)](#)

[How do I enter property commissions?](#)

The Property Card

The Property Card

The property card is made up of panels and action icons. If you open a property via the main menu, the main panel and left panel will open together. If you open a contact via a drop-down, or the universal search bar only the centre panel will open. If only the centre panel opens you can click Full View in the top right hand corner of the panel to open the corresponding left panel.

- [Main Property Panel & Tabs](#)
- [Property Action Icons](#)
- [Left Panel Tabs](#)

Property Panel Tabs

Main Property Panel & Tabs

General	For Sale	Features	OFI	Agents & Contacts	Resources	Commission
----------------	----------	----------	-----	-------------------	-----------	------------

- [General](#) - Main Property information e.g. Category, Type, Address etc. You can also change the status and select which portals you would like to export the property to.
- [For Sale/Lease](#) - In this tab you can enter the Pricing information, agency expiry dates etc for Sale Properties and Pricing and Lease details for Rental listings.
- [Features](#) - This is where you can add/edit the property description, headline, bed, bath car, features etc. This information is exported to the portals and your website.
- [OFI](#) - This is where you can add Open For Inspection dates and times which will appear on your website and the relevant portals.
- [Agents & Contacts](#) - This is where you can link the related agents and contacts to the property. **Note: for reporting and commissions it is important that all related agents are assigned to the property. The first Selected Agent box should contain an Appraisal Agent, Listing Agent, Selling Agent and any referral agents by the end of the sales process.*
- [Resources](#) - This is where you can upload your images, floor plans, links, agency agreements etc.
- [Commission](#) - Master users can complete the property commission data once the property status is changed to Exchanged/under contract.

:: Listing : ID#1P0001 - 1 Jones Street, Copacabana

Full View

General For Sale Features OFI Agents & Contacts Resources Commission

Status: Available

For Sale/Rental: For Sale

Type: * Residential

Category: * House

Investment?:

Sale Method: Private Treaty

Authority: Exclusive

Property Name:

Level No.: Unit No.: Street No.: 1

Street Name: * Jones Street Type: * Street

Save

Copy This Property

Vendor Preview Link

Property Action Icons

Property Action Icons



From Left to Right

- [Preview Property](#)- Preview how the property will look on the website
- [Email](#) - Send an email directly to the related agents and contacts and view previously sent emails. You can also email a copy of the property contract to a contact.
- [SMS](#) - Send an SMS directly to the related agents and contacts (SMS credits to be purchased in advance, contact support on 02 9209 4174 or support@agentbox.com.au)
- [E-Newsletter](#) - Send an e-newsletter to a single contact or an advanced contact search, the property will be added as a feature property.
- [Log Enquiry](#)- Log an enquiry made on a property by an contact, you can also create a contact using this method.
- [Match Contacts](#) - Match available contacts suitable for the property. Only appears if the contacts [requirements](#) have been entered.
- [Log Feedback by Appointment](#)- Log feedback on the property and select which contact has inspected by appointment.
- [Add a Note](#)- Add notes against the property and view previous notes.
- [Add a Meeting](#) - Schedule a meeting with this the related agents and contacts.
- [Tasks & Activity Schedules](#)- Apply a single task, activity schedule or view active and completed tasks against the property.
- [Send a Letter](#)- Send a letter or sales advice directly to the related contacts, edit/create a letter template and access previously sent letters.
- [Brochures & Window Cards](#)- Create a Brochure or Window card for the property using the high

res images.

- [Property Hits](#) - View the property hits from your website for this property
- [Portal Feed Logs](#) - You can view the portal feed receipts for supported portals, currently [realestate.com.au](#) and [domain.com.au](#)
- [Marketing Funds](#) - Keep track of your approved funding and expenditure on the property.

The screenshot shows a web application window titled "Listing : ID#1P0001 - 1 Jones Street, Copacabana". The interface includes a top navigation bar with various icons and a "Full View" button. Below this is a tabbed menu with "General" selected. The main area contains a form with the following fields and values:

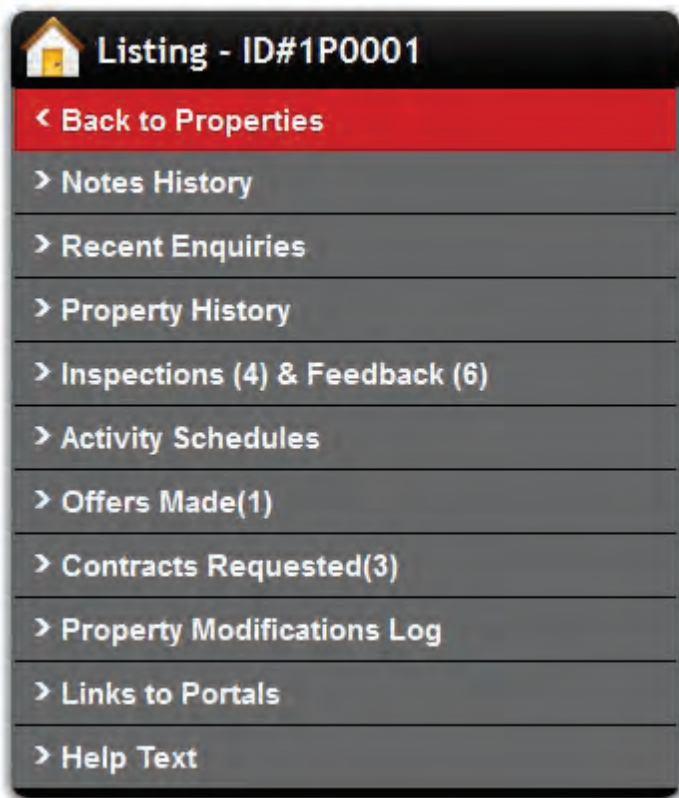
Status:	Available				
For Sale/Rental:	For Sale				
Type: *	Residential				
Category: *	House				
Investment?:	<input type="checkbox"/>				
Sale Method:	Private Treaty				
Authority:	Exclusive				
Property Name:					
Level No.:		Unit No.:		Street No.:	1
Street Name: *	Jones	Street Type: *	Street		
Suburb: *	COPACABANA (2884)	State: *	NSW		

Additional features include a "Save" button at the bottom left, a property image on the right, and two green buttons: "Copy This Property" and "Vendor Preview Link".

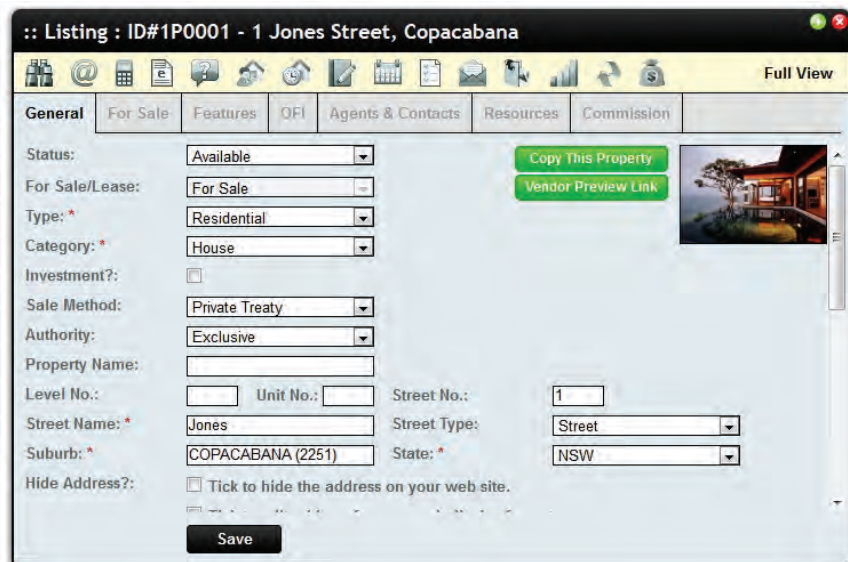
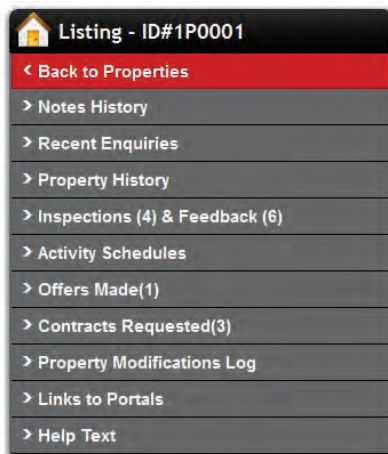
Left Panel

Left Property Panel Tabs

If you are unable to view the left panel, please click Full View in the top right hand corner of the [main property panel](#).



- [Notes History](#) - This section will display all the saved notes relating to the current property
- [Recent Enquiries](#) - This section will display all the [Logged Enquiries](#) relating to the current property being viewed, you can also communicate to this list of [enquirers](#).
- [Property History](#) - This section provides a snapshot of key dates and information relating to the property e.g. Agency Expiry, Appraisal Date, Sold Date, Sold Price etc
- [Inspections & Feedback](#) - This section allows you to [log feedback](#) from Inspections and links to the [feedback report](#)
- [Offers Made](#) - This section allows you to keep a record of all offers and also populates the [vendor report](#)
- [Contracts Requested](#) - This section allows you to keep a record of contract requests and also populates the fee [feedback report](#)
- [Property Modifications Log](#) - This section allows users to view all changes to the property, it keeps a record of the date, time and which CRM user made the change.
- [Links to Portals \(CMA\)](#) - This section provides links to current listings and recent sales similar to the current property on realestate.com.au and domain.com.au



Add Prospect Property

How do I add a Prospect Property?

1. Go to Properties from the main menu.



2. Click on Add and Appraisal/Prospect property on the [left property panel](#).

** Note: if you are unable to see this button please contact a Master user in your office and get them to check your [access permissions](#).*

3. Select Add a Prospect Property

4. Complete the General Prospect Information.

Prospect Property ::

Status: - Defaults to prospect. You can then change this status by selecting [convert to appraisal](#) from the drop down menu.

For Sale/Rental: - Select from the drop down menu, the form fields will adjust accordingly, this will copy if converted to an appraisal.

Type: *- Form fields options will vary depending on if the property is for sale or a rental, this will copy if converted to an appraisal.

Category: * - Form fields options will vary depending on the type chosen, this will copy if converted to an appraisal.

Property Name: - This will copy if converted to an appraisal.

Level No. Unit No.: Street No.: - These will copy if converted to an appraisal.

Street Name: * - This will copy if converted to an appraisal.

Street Type: * - This will copy if converted to an appraisal.

Suburb: * - Start typing the Suburb then select from the drop down. This will copy if converted to an appraisal.

State: * - This will auto generate if Suburb is selected. This will copy if converted to an appraisal.

Address Format: - Tick to edit address for your web display format. - This will adjust the address display on your website only if converted to an appraisal then a listing.

:: Prospect Info ::

Last Sold Price(\$): Numeric Values only - This information will not carry across if converted to an appraisal.

Prospecting Price(\$): Numeric Values only - This price will be converted to the Appraisal Price, if converted to an appraisal.

Last Sold Date: [Select Date] This information will not carry across if converted to an appraisal.

:: Property Details :: **All information will be copied across if converted to an appraisal.*

Bedrooms: - Single Numeric Values only no decimals e.g 1.5

Garages: - Single Numeric Values only no decimals e.g 1.5

Car Spaces: - Single Numeric Values only no decimals e.g 1.5

Bathrooms: - Single Numeric Values only no decimals e.g 1.5

Carports: - Single Numeric Values only no decimals e.g 1.5

Golf Buggy Spaces: - Single Numeric Values only no decimals e.g 1.5

Land Size: Area (sqm) - Numeric Values only

External Area: Area (sqm) - Numeric Values only

Home Size: Area (sqm) - Numeric Values only

Frontage: Metres (m) - Numeric Values only

Construction: e.g. Brick

Aspect: - Select from drop down

Features: - Check all that apply

Tenanted?: * Check if this is a Tenanted Property

:: Tenanted Property :: **All information will be copied across if converted to an appraisal.*

Type of Tenant: - Holiday, Long Term, Monthly...etc

Current Rent:- Numeric Values only

Lease Term: - Free text field

Option Period:- Free text field

Lease Start Date: - [Select Date]

Lease End Date: - [Select Date]

Return %: - Numeric Values only

Annual Rent \$: - Numeric Values only

:: Prospect : Create

Step 1 of 2 - Complete Prospect Information

Prospect Agents & Contacts

:: Prospect Property ::

Status: Prospect For Sale/Rental: For Sale

Type: * Residential

Category: * House

Property Name:

Level No. Unit No.: Street No.: 54

Street Name: * Burns Street Type: * Rise

Suburb: * Syd State: * NSW

Address Format:

Sydenham (2044)	NSW
Sydenham (3037)	VIC
Sydney (2000)	NSW

Google Map: Re-Position Marker

:: Prospect Info ::

- Click Save and Proceed and assign any related contacts or agents.
 - Select role from drop down
 - Type Agent name and select from results.
 - Click Add, to insert as selected agent.

:: Prospect Property : #2 - 54 Burns Rise, Sydney

Step 2 of 2 - Specify Agents & Contacts related to this property transaction

Prospect Agents & Contacts

:: Assign related Agents ::

Role: Listing Agent (unchecked to de-select)

Agent: joh Add

Selected Agents:

- John Smith (Listing Agent)
- Add New Staff...

Appear on Site:

:: Assign related Contacts ::

- Click Finish
- You can now [match contacts](#) and [add a note](#) using the action icons or view the [notes history](#) and

[conduct a CMA](#) from the left panel.

Convert to Appraisal

How do I convert a Prospect Property to an Appraisal?

1. [Search for your Prospect Property](#) and open the [Property Card](#)
2. Select Convert to Appraisal from the Status drop down menu.

The screenshot shows a software interface for managing property records. The window title is "Prospect : #2 - 54 Burns Rise, SYDNEY (2000)". The main content area is titled "Prospect Property ::" and contains several form fields. The "Status" dropdown menu is open, showing three options: "Prospect", "Convert to Appraisal" (which is highlighted in blue), and "Cancelled/Missed". Other fields include "For Sale/Rental" set to "For Sale", "Property Name" (empty), "Level No." (empty), "Unit No." (empty), "Street No." set to "54", "Street Name" set to "Burns", "Street Type" set to "Rise", "Suburb" set to "SYDNEY (2000)", and "State" set to "NSW". The "Address Format" field contains "54 Burns Rise". There is a checkbox labeled "Tick to edit address for your web display format." and a "Google Map" section with a "Re-Position Marker" button. A "Save" button is located at the bottom center of the form.

3. Click Save, and the property card will reload as an appraisal.

Add Appraisal Property

How do I add a Market Appraisal?

1. Go to Properties from the main menu.



2. Click on Add and Appraisal/Prospect property on the [left property panel](#).

** Note: if you are unable to see this button please contact a Master user in your office and get them to check your [permissions](#).*

3. Select Add a Market Appraisal

4. Complete the General Appraisal Information.

Property to Appraise ::

Status: Defaults to Appraisal. You can then change this status by selecting either listing presentation, [convert to listing](#), or [cancelled/missed](#) from the drop down menu.

For Sale/Rental: - Select from the drop down menu, the form fields will adjust accordingly, this will copy if converted to a listing.

Type: *- Form fields options will vary depending on the status chosen, this will copy if converted to a listing.

Category: * - Form fields options will vary depending on the status chosen, this will copy if converted to a listing.

Property Name: - This will copy if converted to a listing.

Level No. Unit No.: Street No.: - These will copy if converted to a listing.

Street Name: * - This will copy if converted to a listing.

Street Type: * - This will copy if converted to a listing.

Suburb: * - Start typing the Suburb then select from the dropdown. This will copy if converted to a listing.

State: * - This will auto generate if Suburb is selected. This will copy if converted to a listing.

Address Format: - Tick to edit address for your web display format. - This will adjust the address display on your website only if converted to a listing.

:: Appraisal Info ::

Price From(\$): - Numeric value only, field can be used as variables in [letter templates](#).

Price To(\$): - Numeric value only, field can be used as variables in [letter templates](#).

Appraisal Price(\$): * - Compulsory field for reporting purposes. Numeric Values only.

Appraisal Date: [Select Date] - Field can be used as variables in [letter templates](#).

Appraisal Time: - Numeric value only, field can be used as variables in [letter templates](#).

Appraisal Source: - Internal reference and/or reporting Select from drop down, field can be used as variables in [letter templates](#)

Appraisal For: - Internal reference and/or reporting Select from drop down, field can be used as variables in [letter templates](#)

Property Condition: - Internal reference and/or reporting Select from drop down, field can be used as variables in [letter templates](#)

Sale Method: - This will copy if converted to a listing, field can be used as variables in [letter templates](#)

Reason for Appraisal: Internal reference and/or reporting Select from drop down

:: Property Details :: **All information will be copied across if converted to a listing.*

Bedrooms: - Single Numeric Values only (do not use decimals e.g 1.5)

Garages: - Single Numeric Values only (do not use decimals e.g 1.5)

Car Spaces: - Single Numeric Values only (do not use decimals e.g 1.5)

Bathrooms: - Single Numeric Values only (do not use decimals e.g 1.5)

Carpports: - Single Numeric Values only (do not use decimals e.g 1.5)

Golf Buggy Spaces: - Single Numeric Values only (do not use decimals e.g 1.5)

Land Size: Area (sqm) - Numeric Values only

External Area: Area (sqm) - Numeric Values only

Home Size: Area (sqm) - Numeric Values only

Frontage: Metres (m) - Numeric Values only

Construction: e.g. Brick

Aspect: - Select from drop down

Features: - Check all that apply

Tenanted?: * Check if this is a Tenanted Property

:: Tenanted Property :: **All information will be copied across if converted to a listing.*

Type of Tenant: - Holiday, Long Term, Monthly...etc

Current Rent:- Numeric Values only

Lease Term: - Free text field

Option Period:- Free text field

Lease Start Date: - [Select Date]

Lease End Date: - [Select Date]

Return %: - Numeric Values only

Annual Rent \$: - Numeric Values only

:: Appraisal : Create

Step 1 of 3 - Complete Appraisal Information

Appraisal	Agents & Contacts	Custom Info	Resources
Car Spaces:	<input type="text"/>	Golf Buggy Spaces:	<input type="text"/>
Land Size:	<input type="text"/> Area (sqm)	Home Size:	<input type="text"/> Area (sqm)
External Area:	<input type="text"/> Area (sqm)	Frontage:	<input type="text"/> Metres (m)
Construction:	<input type="text"/>		
Aspect:	<input type="text"/>		
Features:	<input type="checkbox"/> Air Conditioning <input type="checkbox"/> Lift Installed <input type="checkbox"/> Alarm System <input type="checkbox"/> Ocean Views <input type="checkbox"/> Area Views <input type="checkbox"/> Open Fire Place <input type="checkbox"/> Beach Front <input type="checkbox"/> Penthouse <input type="checkbox"/> Built-In Wardrobes <input type="checkbox"/> Pets Allowed <input type="checkbox"/> Bush Retreat <input type="checkbox"/> Pool <input type="checkbox"/> City Views <input type="checkbox"/> Prestige Homes		
Tenanted?:	<input type="checkbox"/> * Check if this is a Tenanted Property		

Save & Proceed »

5. Click Save and Proceed and assign any related contacts or agents.
 - Select role from drop down
 - Type Agent name and select from results.
 - Click Add, to insert as selected agent.
 - To hide an agent from the website, Un-tick the check box next to their name in the Appear on Site box and hit save.

**Note: for reporting and commissions it is important that all related agents are assigned to the property. The first Selected Agent box should contain an Appraisal Agent, Listing Agent, Selling Agent and any referral agents by the end of the sales process.*

:: Appraisal : #1P0007 - 1 Jones Boulevard, Copacabana

Step 2 of 4 - Specify Agents & Contacts related to this property transaction

Appraisal Agents & Contacts Custom Info Resources

:: Assign related Agents ::

Role: Listing Agent (dropdown) (uncheck to de-select)

Agent: john (input) Add (button)

Selected Agents: John Smith (Listing Agent) Add New Staff... (dropdown)

Appear on Site: (checkbox)

:: Assign related Contacts ::

6. Click Save and Proceed and enter in any custom info - Please note this information will not be carried across if converted to a listing.

- Click Add Custom Info
- Enter a title for this information e.g. notes for copy
- Enter notes in the custom field that has become available

:: Appraisal : #1P0007 - 1 Jones Boulevard, Copacabana

Step 3 of 4 - Edit Appraisal Custom Information

Appraisal Agents & Contacts Custom Info Resources

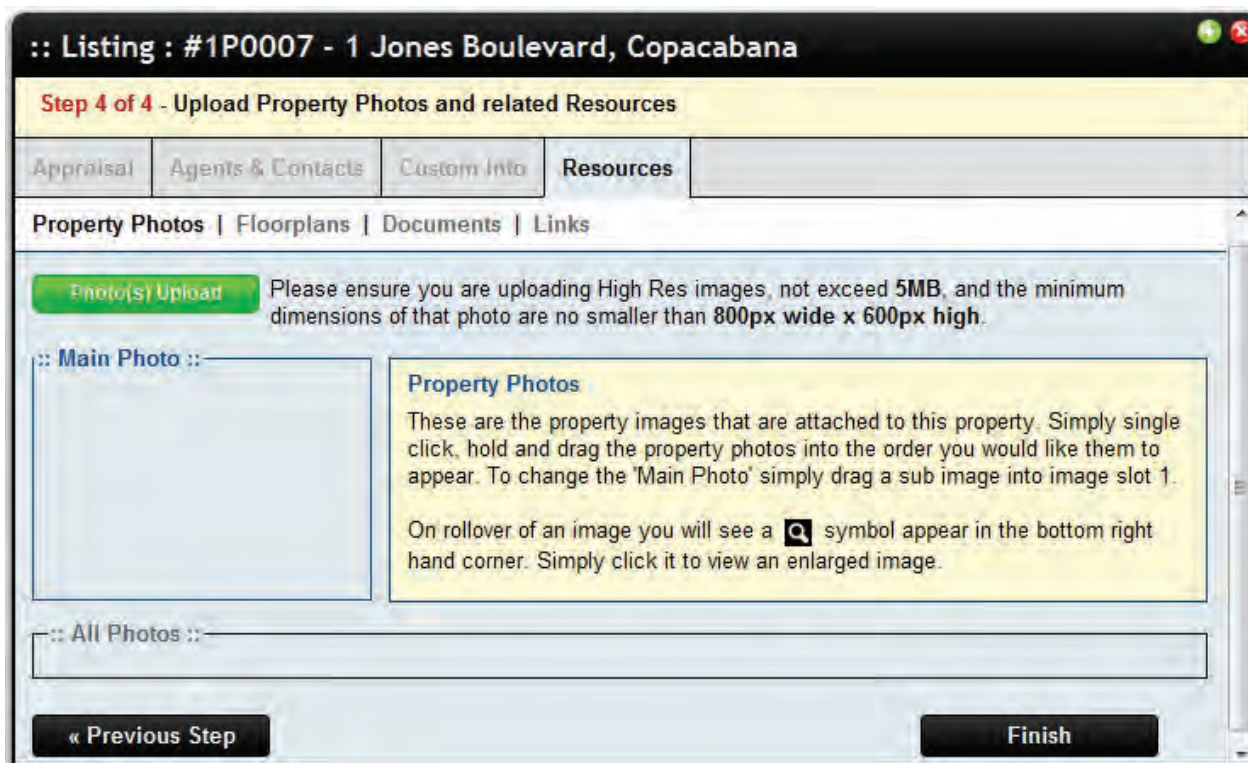
Add Custom Info (button)

:: Appraisal Custom Info ::

Notes for Copy: Enter the notes here. (text area)

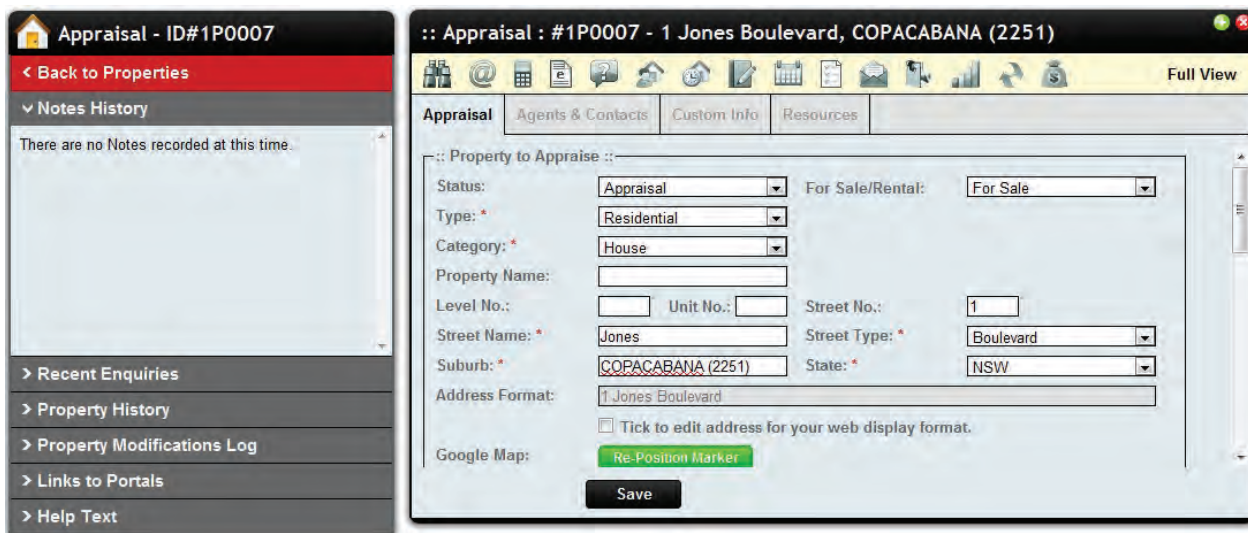
« Previous Step (button) Save & Proceed » (button)

7. Click Save & Proceed to upload any [Resources](#)



8. Click Finish

9. You can now start using all [property action icons](#) or view the [notes history](#), [recent enquiries](#), [property history](#), [modification logs](#) or [conduct a CMA](#) from the left panel.



Convert to Listing or Missed

How do I convert a Market Appraisal to a Listing Presentation, New Listing or mark as Cancelled/Missed?

1. [Search for your Appraisal Property](#) and open the [Property Card](#)
2. Select the new status from the drop down menu.

- **Listing Presentation** - This status has the same functionality and look of an appraisal however is an additional search category for properties that you have gone out and presented to (presentation date must be entered for reporting).
- **Convert to Listing** - This will convert the appraisal to an Offline Listing with the Status - Offline - Not ready for Public Display. You will then need to add all the relevant information to change the property to Available/On Market (Listing Date/Agency Agreement date must be entered for reporting).
- **Cancelled/Missed** - This marks the property as Offline with the reason - cancelled/missed appraisal (with the option to differentiate between cancelled [Vendor not selling, etc] and missed [lost to another agency, etc]. You can use an advanced contact search to find these properties and will be reflected in appraisal reports.

3. Click Save, and the property card will reload in it's new status.

Add Property

How do I add a new sale or rental property?

1. Go to Properties from the main menu.



2. Click on Add a Property on the [left property panel](#).

**Note: if you are unable to see this button please contact a Master user in your office and get them to check your [permissions](#).*

3. Complete the General Property Information.

Status: - Will default as offline - not ready for public display. You will need to upload all resources before changing the status to available

For Sale/Rental: - Select the type of property, the form fields will update based on your selection.

Type: * - E.g. Residential, Commercial - Select the type of sale or rental and the category fields will update based on your selection.

Category: * - Select category based on your type e.g. Commercial categories include Retail, Office, Warehouse etc. (If commercial you can select up to 3 categories to export to the portals)

Investment?: - This is for internal reference only on sale properties

Sale Method: - If a sale property, you will need to specify the sales method e.g. Auction. Once selected you will be able to enter additional information for this method e.g. dates, times, location etc.

Property Name: - Enter the name of the property if applicable.

Level No.: Unit No.: Street No.: - All address fields are to be entered separately. You can change the display of the address or hide from public display later.

Street Name: *

Street Type: *

Suburb: * - Start typing the Suburb then select from the dropdown. This will copy if converted to a listing.

State: * - This will auto generate if Suburb is selected. This will copy if converted to a listing.

Hide Address?: - Tick to hide the address on your web site - This will hide the street address on both your website and all portals e.g. realestate.com.au and will only show the suburb.

Tick to edit address for your web display format. - This will adjust the display of the address on your website, digital prints and e-newsletters only.

Google Map: Hide Street View Hide "What's around"

Key to Property?: - Internal reference only

Property Key No.: - Internal reference only

Access Details.: - Internal reference only

:: Listing : Create

Step 1 of 6 - Complete General Information

General	For Sale/Lease	Features	Open Homes	Agents & Contacts	Resources
Suburb: *	Sydney (2000)	State: *	NSW		
Hide Address?:	<input type="checkbox"/> Tick to hide the address on your web site. <input type="checkbox"/> Tick to edit address for your web display format.				
Address Format:	654 Victoria Street				
Google Map:	<input type="button" value="Re-Position Marker"/> <input type="checkbox"/> Hide Street View <input type="checkbox"/> Hide "What's around"				
Key to Property?:	<input checked="" type="checkbox"/>	Property Key No.:	14		
Access Details.:	Contact owner				
<input type="button" value="Save & Proceed »"/>					

4. Click Save & Proceed

5. Enter Sale or Lease information, the form fields will change depending on the property type.

Search Price - Numeric value only that is hidden to the public, used to determine the search range on your website and the various portals

Display Price - This is the advertised price and can include all characters and symbols. Maximum 50 characters permitted if exporting to realestate.com.au

Rates - All rates information will be advertised if entered

Tenanted?: * Check if this is a Tenanted Property

:: Tenanted Property ::

Type of Tenant: - Holiday, Long Term, Monthly...etc

Current Rent:- Numeric Values only

Lease Term: - Free text field

Option Period:- Free text field

Lease Start Date: - [Select Date]

Lease End Date: - [Select Date]

Return %: - Numeric Values only

Annual Rent \$: - Numeric Values only

:: Listing : #1P0008 - 654 Victoria Street, Sydney

Step 2 of 6 - Complete Pricing Information

General	For Sale	Features	Open Homes	Agents & Contacts	Resources
Status:	Offline				
Listing Date:	22	11	2011	Agency Expiry:	20 02 2012
Search Price (\$) *	1200000			Display Price:	Offers above \$1.2 Million
Water Rates:	0	per quarter		Land Tax:	0 per quarter
Council Rates:	0	per quarter		Strata Levies:	0 per quarter
Other Outgoings:		per quarter		Total Outgoings:	per year
Zoning:					
Tenanted?:	<input type="checkbox"/> * Check if this is a Tenanted Property				
« Previous Step			Save & Proceed »		

6. Click Save & Proceed to enter the property features and description.

:: Property Details :: *All information will be advertised.

Select Copy: Defaults to Web - if you use campaign management tools e.g. Campaign Track requires additional copy to be entered.

Main Headline: Free text area with character count.

Property Description: Free text area with character count.

Bedrooms: - Single Numeric Values only no decimals e.g 1.5

Garages: - Single Numeric Values only no decimals e.g 1.5

Car Spaces: - Single Numeric Values only no decimals e.g 1.5

Bathrooms: - Single Numeric Values only no decimals e.g 1.5

Carports: - Single Numeric Values only no decimals e.g 1.5

Land Size: Area (sqm) - Numeric Values only

External Area: Area (sqm) - Numeric Values only

Home Size: Area (sqm) - Numeric Values only

Frontage: Metres (m) - Numeric Values only

Construction: e.g. Brick

Aspect: - Select from drop down

Features: - Check all that apply

:: Listing : #1P0008 - 654 Victoria Street, Sydney

Step 3 of 6 - Complete Features and Description

General For Sale **Features** Open Homes Agents & Contacts Resources

Select Copy: Website & Enews

Main Headline: Enter the Headline
 Characters typed in so far: 18 (max = 150 characters)

Property Description: And Property Description
 Characters typed in so far: 24 (max = 2500 characters)

Bedrooms: Bathrooms:

7. Click Save and Proceed to add in inspections times
 - Select the Date and time and click Add Open Time
 - or Select the Type from the Open Type drop down

:: Listing : #1P0008 - 654 Victoria Street, Sydney

Step 4 of 6 - Specify Open Home Inspection Times

General For Sale Features **Open Homes** Agents & Contacts Resources

Open Date: 22 11 2011 Open From: 10 00 AM To: 10 00 PM
 Add Open Time

Open Type:

:: Upcoming Inspection Times ::
 No inspection data has been entered.

:: Past Inspections ::
 No inspection data has been entered.

« Previous Step Save & Proceed »

8. Click Save and Proceed and assign any related contacts or agents.
 - Select role from drop down
 - Type Agent name and select from results.

- Click Add, to insert as selected agent.
- To hide an agent from the website, Un-tick the check box next to their name in the Appear on Site box and hit save.

**Note: for reporting and commissions it is important that all related agents are assigned to the property. The first Selected Agent box should contain an Appraisal Agent, Listing Agent, Selling Agent and any referral agents by the end of the sales process.*

The screenshot shows a window titled "Appraisal : #1P0007 - 1 Jones Boulevard, Copacabana". Below the title bar is a yellow banner that reads "Step 2 of 4 - Specify Agents & Contacts related to this property transaction". The interface has a tabbed menu with "Agents & Contacts" selected. The main content area is titled "Assign related Agents ::" and contains the following fields:

- Role:** A dropdown menu currently set to "Listing Agent".
- Agent:** A text input field containing "john" and a green "Add" button to its right.
- Selected Agents:** A list box containing "John Smith (Listing Agent)" and "Add New Staff...".
- Appear on Site:** A large empty rectangular box.

At the bottom of the window, there is a partially visible section titled "Assign related Contacts ::".

**Note: to link contacts to properties and to populate the Sales Advice and letters it is important that all related contacts are assigned to the property. The Selected Contacts box should contain at least the Vendor, Vendor Solicitor, Buyer and Buyer Solicitor by the end of the sales process.*

:: Listing : #1P0008 - 654 Victoria Street, Sydney

Step 5 of 6 - Specify Agents & Contacts related to this property transaction

General | For Sale | Features | Open Homes | **Agents & Contacts** | Resources

Role: Vendor (uncheck to de-select)

Contact: Saman

Selected Contacts: Samantha Jones (Vendor) samantha@hotmail.com
Add New Contact...

« Previous Step Save & Proceed »

9. Click Save & Proceed to upload any [Resources](#)

:: Listing : #1P0007 - 1 Jones Boulevard, Copacabana


Step 4 of 4 - Upload Property Photos and related Resources

Appraisal | Agents & Contacts | Custom Info | **Resources**

Property Photos | Floorplans | Documents | Links

Photo(s) Upload Please ensure you are uploading High Res images, not exceed 5MB, and the minimum dimensions of that photo are no smaller than 800px wide x 600px high.

Main Photo

Property Photos
These are the property images that are attached to this property. Simply single click, hold and drag the property photos into the order you would like them to appear. To change the 'Main Photo' simply drag a sub image into image slot 1.
On rollover of an image you will see a  symbol appear in the bottom right hand corner. Simply click it to view an enlarged image.

All Photos

« Previous Step Finish

8. Click Finish

9. You can now..

- Start using all [property action icons](#) and all items from the [left property panel](#).

- **Vendor Preview Link** - You can send a preview link to the Vendor for sign off by clicking the green Vendor Preview Link below the property image on the [General Property Tab](#). Only if you are using an Agentbox website and if the vendor is attached in the Agents & Contacts tab.
- **Advertise on your website** - You can now change the property status to Available to advertise on your website and portals.
- **Export to Portals** - Once the property is marked available, you can tick the portal export check boxes at the bottom of the [General Property Tab](#) then click save.

:: Listing : ID#1P0008 - 654 Victoria Street, Sydney

Full View

General | For Sale | Features | Open Homes | Agents & Contacts | Resources | Commission

Status: **Available** (dropdown menu open showing: Offline, Available, Exchanged, Sold/Settled, Offline, Under Contract)

For Sale/Rental: [dropdown]

Type: * [dropdown]

Category: * [dropdown]

Investment?:

Sale Method: [Private Treaty dropdown]

Authority: [Exclusive dropdown]

Property Name: [text input]

Level No.: [text input] Unit No.: [text input] Street No.: [654 text input]

Street Name: * [Victoria text input] Street Type: * [Street dropdown]

Suburb: * [SYDNEY (2000) text input] State: * [NSW dropdown]

[Save button]

[Copy This Property button]

[Vendor Preview Link button]

Changing Property Status

Changing a property status

Agentbox is limited to what can be sent to the various portals regarding a property status. The status flow in Agentbox works as follows and it is important for both reporting and advertising that you update the data correctly.

Available: Property advertised on your website and portals as **current/available**

Under Contract: Property advertised on your website and portals as **'under contract'**

Exchanged - Conditional: Property advertised on your website and portals as **current/available**

Exchanged - Unconditional: Property advertised on your website and portals as **SOLD** [Sold Date = Contract Date]

Settled: Property remains advertised on your website and portals as **SOLD** [Sold Date = Contract Date]

Detailed Property Status Information

Status	Sub Status	For Sale/ For Lease	Meaning	
Prospect	n/a	any	Property is a potential listing for your office	
Appraisal	n/a	any	Property is being Appraised by your office	
Listing Presentation	n/a	any	Property is being Appraised by your office and Presentation has been completed	
Offline	Not Ready For Public Display	any	Property is listed with your office but not ready to be advertised	
	Withdrawn	any	Property was listed with your office but the vendor has withdrawn before any successful sale	
	Sold, Not for Public Display	any	Listing has been sold/leased and should longer be advertised	not
	Sold By Another Agent	any	Listing was sold/leased by another agency and should no longer be advertised	
	Archived	any	Property will not show in any reports and will not be advertised (use if a property has been entered into the system in error)	
	Auction Passed In/Cancelled	For Sale Only	Listing was unsuccessful at Auction and also did not sell after Auction. Vendor has withdrawn	
	Appraisal Missed	any	Property was Appraised by your office but the Vendor went with another agency	
	Appraisal Cancelled	any	Property was Appraised by your office but the Vendor decided not to sell	
Available	n/a	any	Listing is currently on the market / being advertised by your office	disp listi
Leased	n/a	For Lease Only	Listing has been leased	disp listi 'leas on v
Under Contract / Exchanged	conditional	For Sale Only	Contracts have been signed / exchanged but are awaiting conditions to be fulfilled / cool off to expire	disp listi 'unc (dep des
	unconditional	For Sale Only	Contracts have been signed / exchanged and all conditions have been met - the listing is sold, awaiting settlement	disp pag con

				ban web
Settled	n/a	For Sale Only	The sale has settled	dis pag con ban web

Property Resources

Property Resources

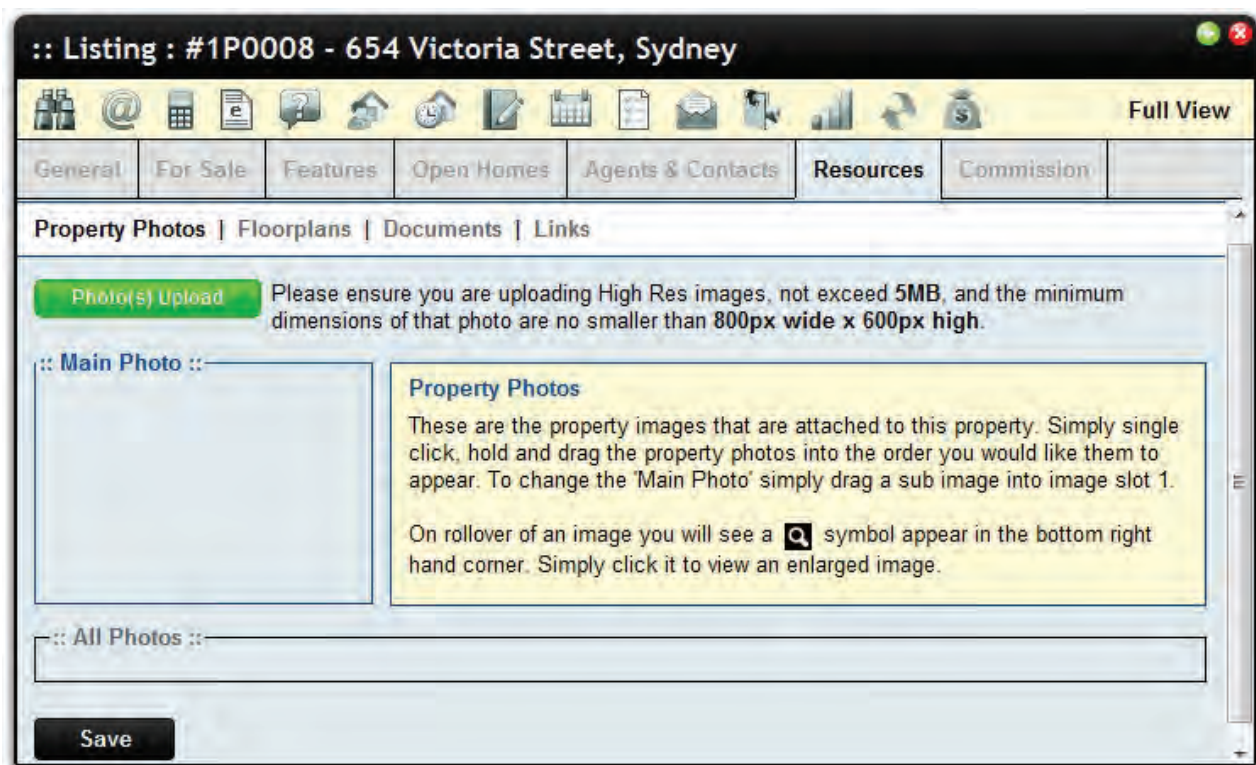
Property Resources include:

- [Property photos](#)
- [Floorplans](#)
- [Documents](#)
 - Agency Agreement
 - Property Contract
 - Sustainability Declaration
 - Other Documents
- [Links](#)
 - General External Link
 - Virtual Tour Link

Property Photos

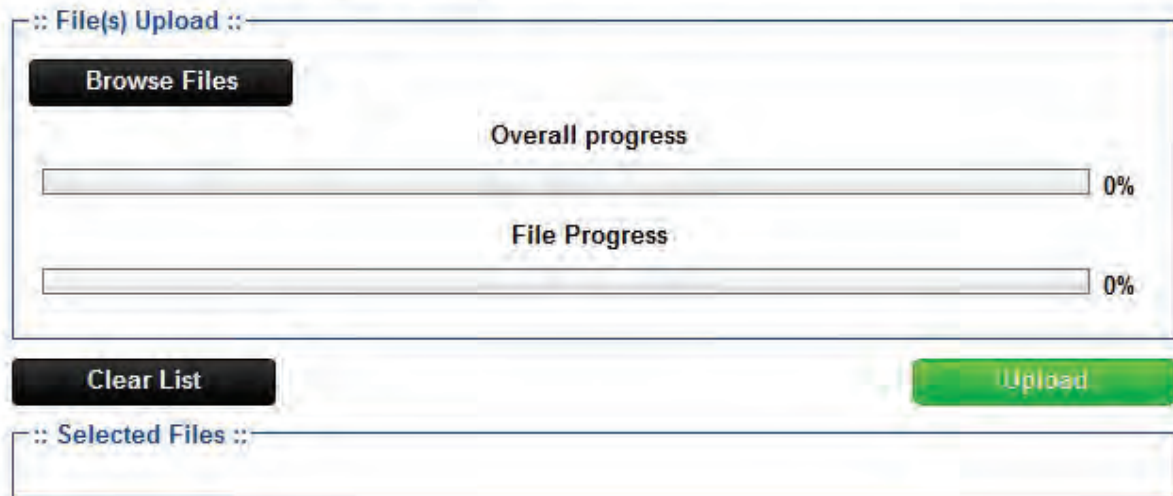
How do I upload Property photos?

1. [Search for your Property](#) and open the [Resources Tab](#) on the [Property Card](#)
2. Click on the green Photo Upload button.



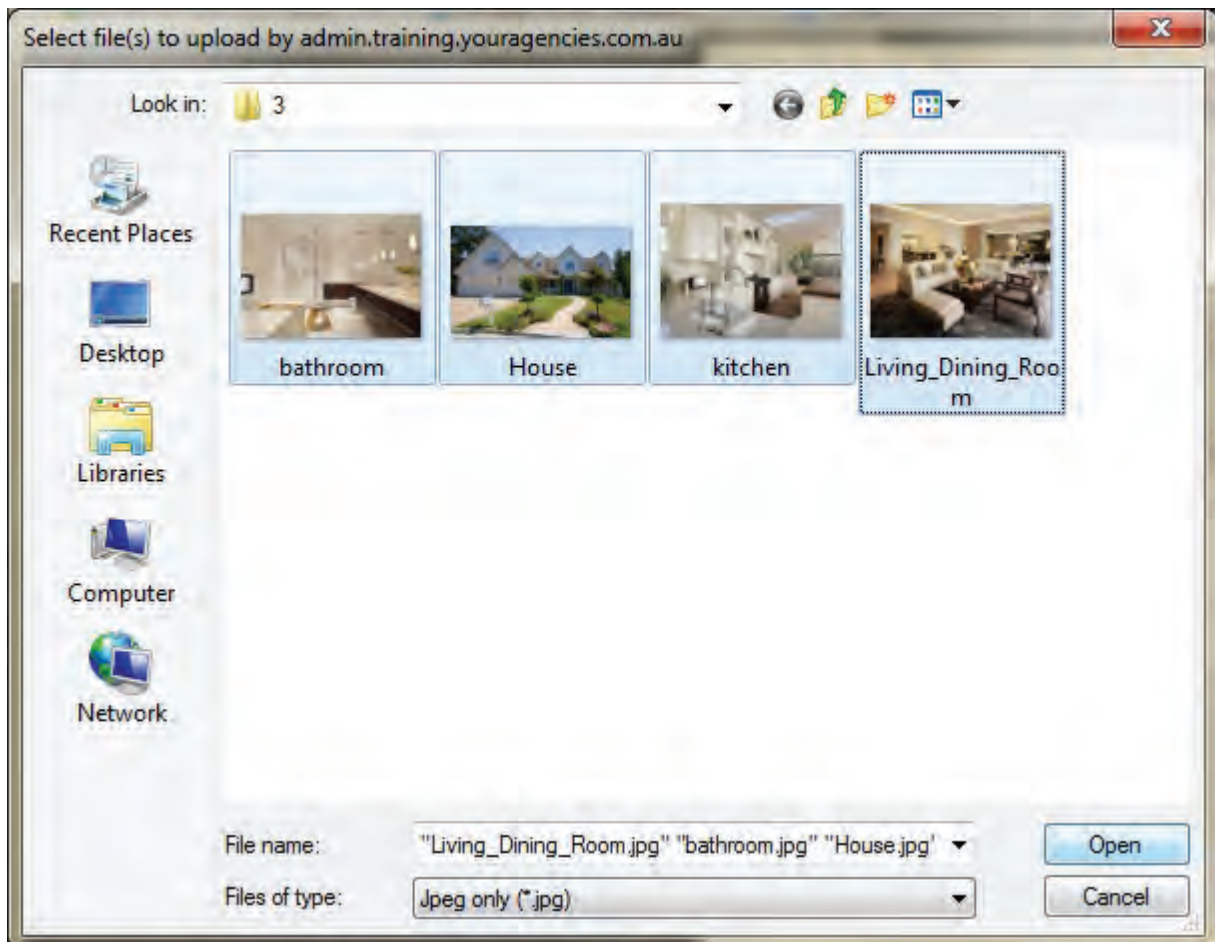
3. Click Browse

Click the 'Browse Files' button to go and select the files you wish to upload from your local computer. Then select 'Upload' to confirm the files to publish.



4. Locate Photo located within computer files, click on image then select Open

- Hold Ctrl to select multiple images
- Images can be up to 5mb per image
- Images must be JPEG with extension .jpg

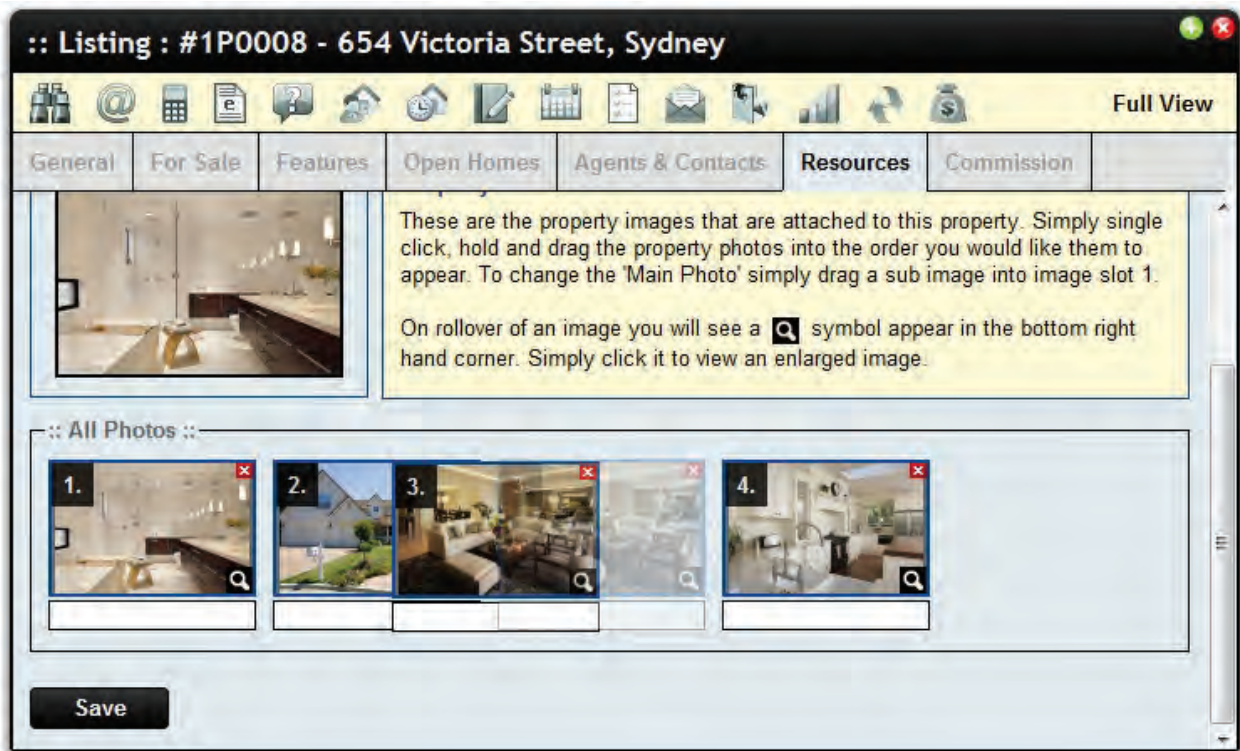


5. Click Upload

The screenshot displays a file upload interface. At the top, there is a section titled "File(s) Upload" containing a "Browse Files" button. Below this, two progress bars are shown: "Overall Progress (1.8 MB)" at 7% and "File Progress 'bathroom.jpg'" at 78%. The latter includes the text "Upload with 132.8 kB/s. Time left: ~1sec". To the right of the progress bars is a green "Upload" button. Below the progress bars is a "Clear List" button. The bottom section, titled "Selected Files", lists four files: "bathroom.jpg" (157.9 kB), "House.jpg" (1.1 MB), "kitchen.jpg" (172.2 kB), and "Living_Dining_Room.jpg" (361 kB). Each file entry includes a small icon and a red 'x' for removal.

File Name	Size
bathroom.jpg	157.9 kB
House.jpg	1.1 MB
kitchen.jpg	172.2 kB
Living_Dining_Room.jpg	361 kB

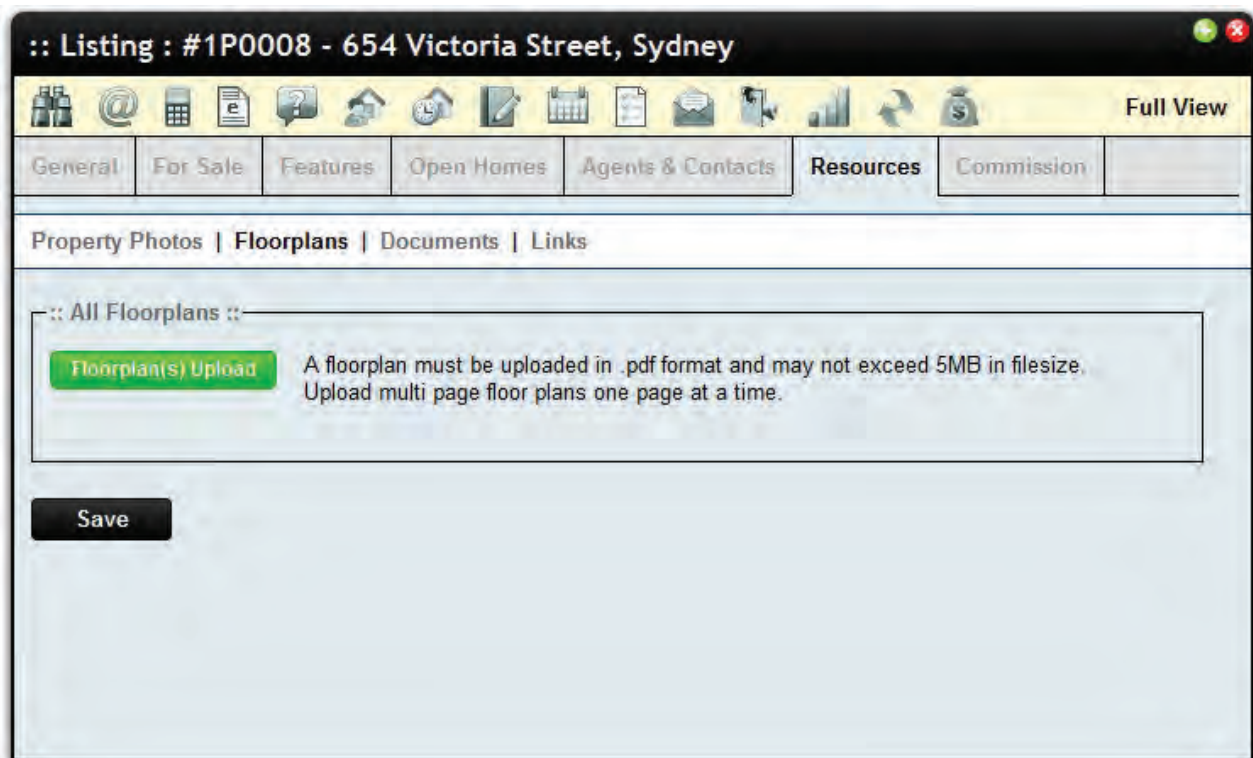
6. Once the upload has complete, the upload panel will disappear and you will be directed back to the resource tab, simply drag and drop the images to re-order. The image moved to the number one position will update as the main photo when you hit Save.



Floorplans

How do I add a Floorplan to a Property in Agentbox?

1. [Search for your Property](#) and open the [Resources Tab](#) on the [Property Card](#)
2. Click on Floorplans on the sub resources tab



3. Click on Floorplans Upload

Click the 'Browse Files' button to go and select the files you wish to upload from your local computer. Then select 'Upload' to confirm the files to publish.

File(s) Upload

Browse Files

Overall progress

0%

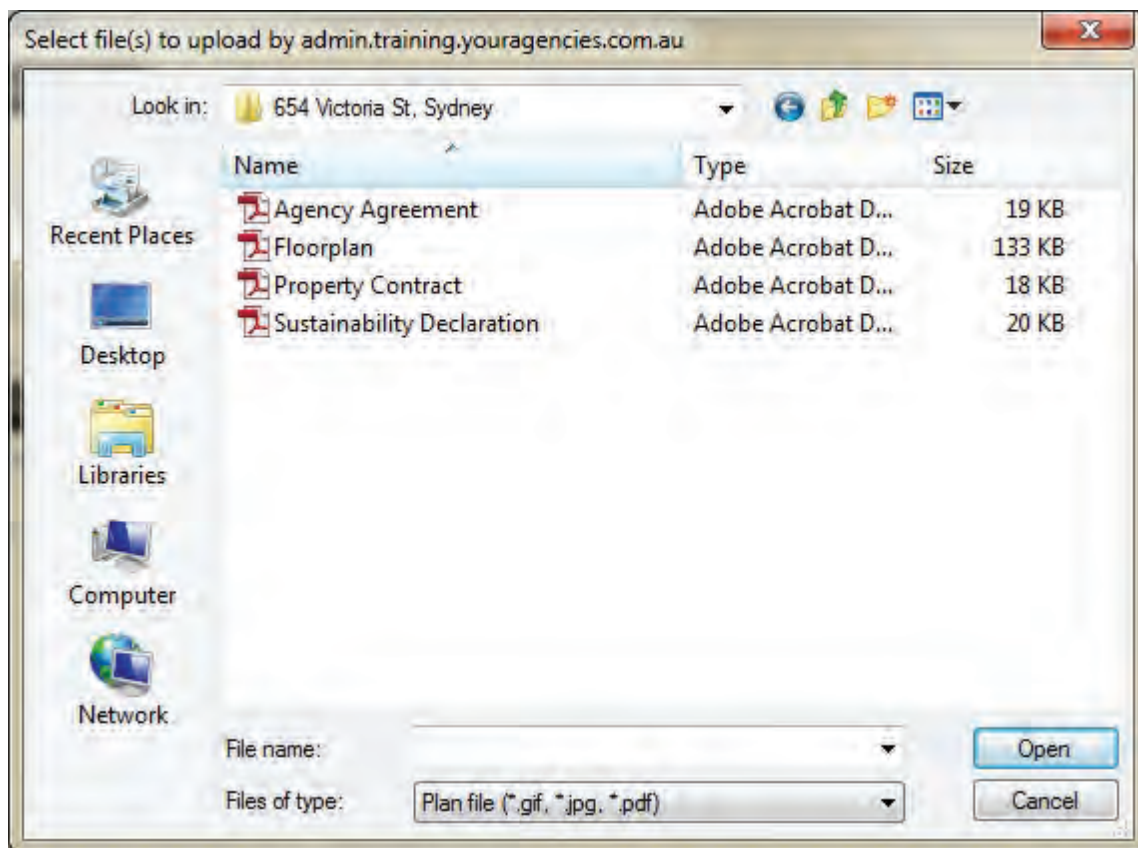
File Progress

0%

Clear List **Upload**

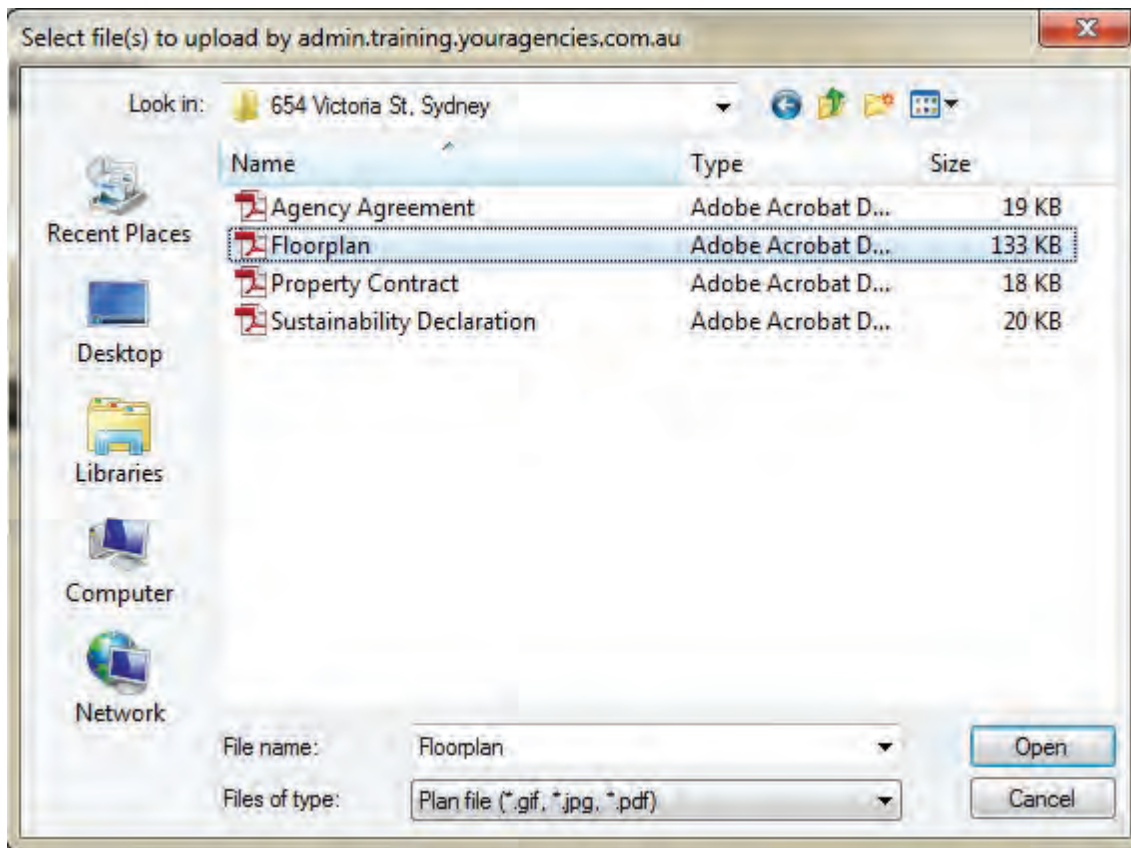
Selected Files

4. Click on Browse Files



5. Select Floorplan from your file

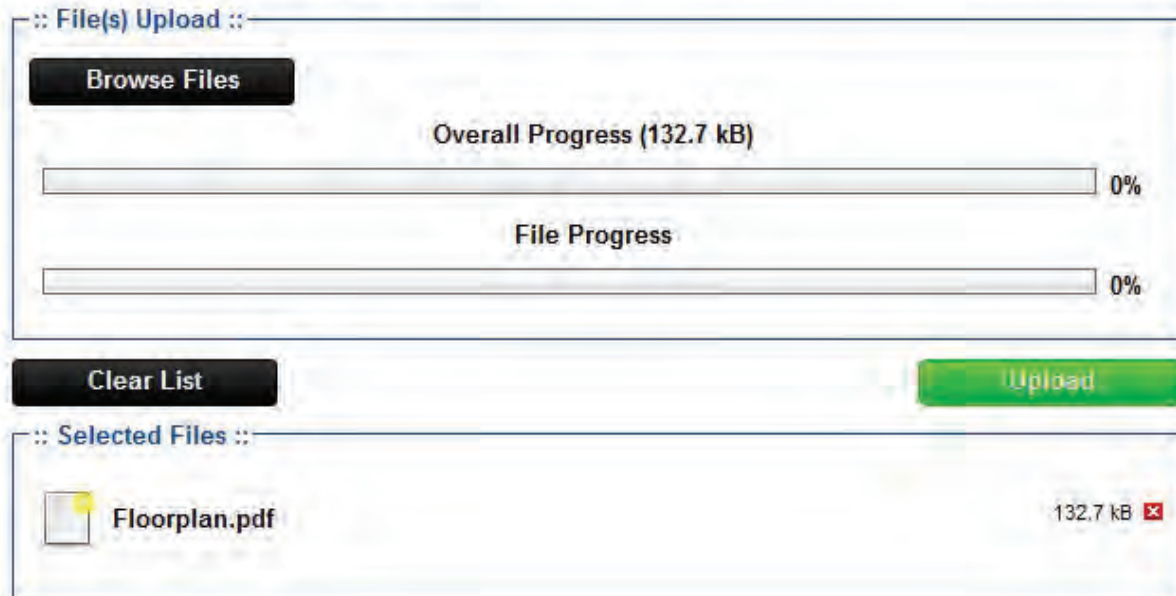
**Note: A floorplan must be uploaded in .pdf or .jpg format and may not exceed 5mb in file size. You can upload multi page floor plans one page at a time.*



6. Click on Open

7. The Floorplan will appear on screen

Click the 'Browse Files' button to go and select the files you wish to upload from your local computer. Then select 'Upload' to confirm the files to publish.



8. Click on Upload

9. Floorplan will upload

Click the 'Browse Files' button to go and select the files you wish to upload from your local computer. Then select 'Upload' to confirm the files to publish.

:: File(s) Upload ::

Browse Files

Overall Progress (132.7 kB)

18%



File Progress "Floorplan.pdf"

18%

Upload with 158.2 kB/s. Time left: ~1sec

Clear List **Upload**

:: Selected Files ::

 **Floorplan.pdf** 132.7 kB 

10. You will be taken back to the Floorplan Resources tab.

:: Listing : #1P0008 - 654 Victoria Street, Sydney



Full View


General For Sale Features OFI Agents & Contacts **Resources** Commission

Property Photos | **Floorplans** | Documents | Links

:: All Floorplans ::

Floorplan(s) Upload A floorplan must be uploaded in .pdf format and may not exceed 5MB in filesize. Upload multi page floor plans one page at a time.

 **View** 

 Floorplan.pdf | Updated 30th Nov, 2011 | 132.69 KB

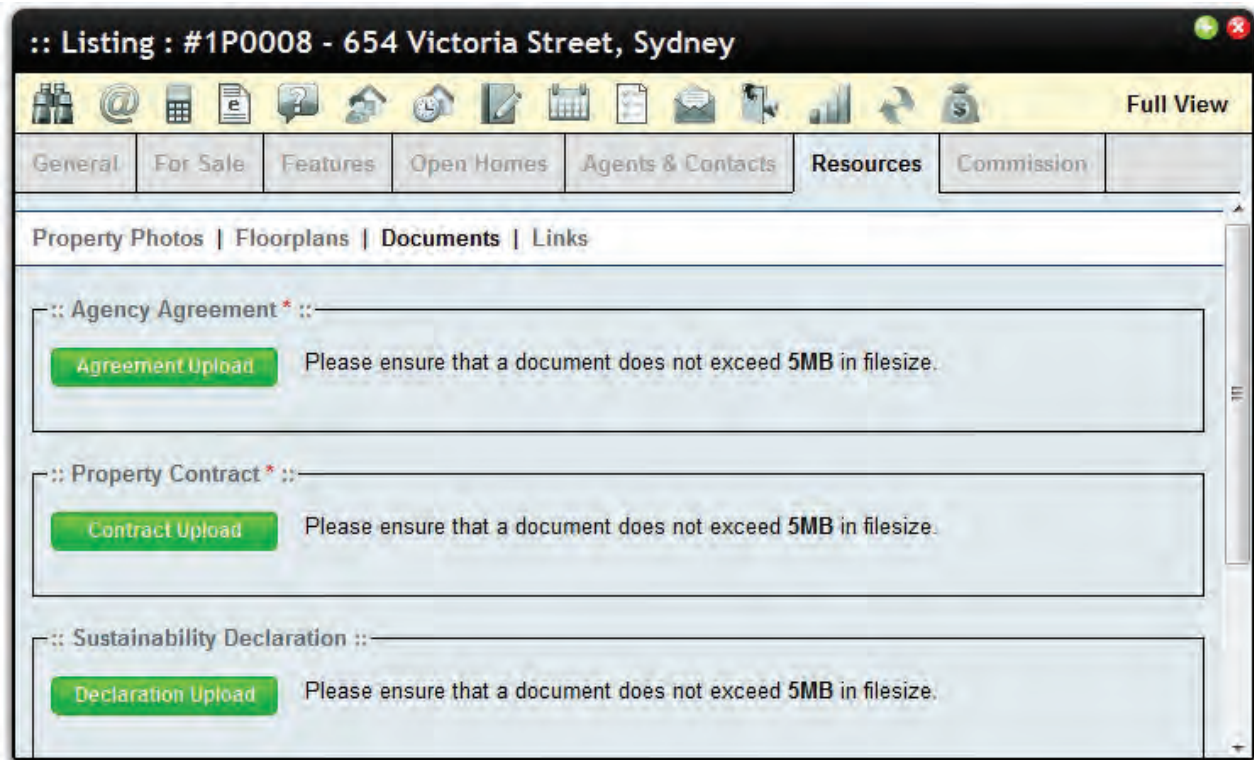
Save

10. Click on Save

Documents

How do I upload Property documentation such as an Agency Agreement, Property Contract or Sustainability Declaration?

1. [Search for your Property](#) and open the [Resources Tab](#) on the [Property Card](#)
2. Click on Documents on the sub resources tab



3. Click on the Upload button for the file you would like to upload e.g. Agreement Upload

Click the 'Browse Files' button to go and select the files you wish to upload from your local computer. Then select 'Upload' to confirm the files to publish.



:: File(s) Upload ::

Browse Files

Overall progress

0%

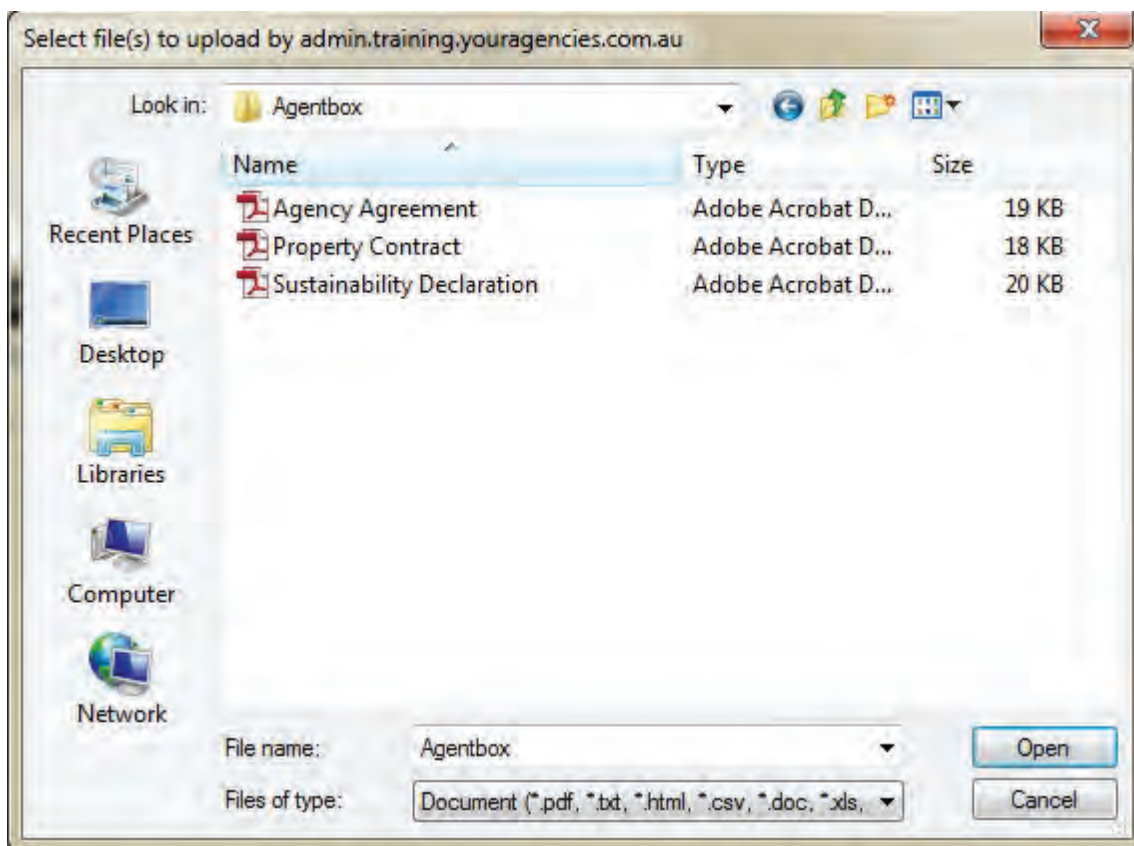
File Progress

0%

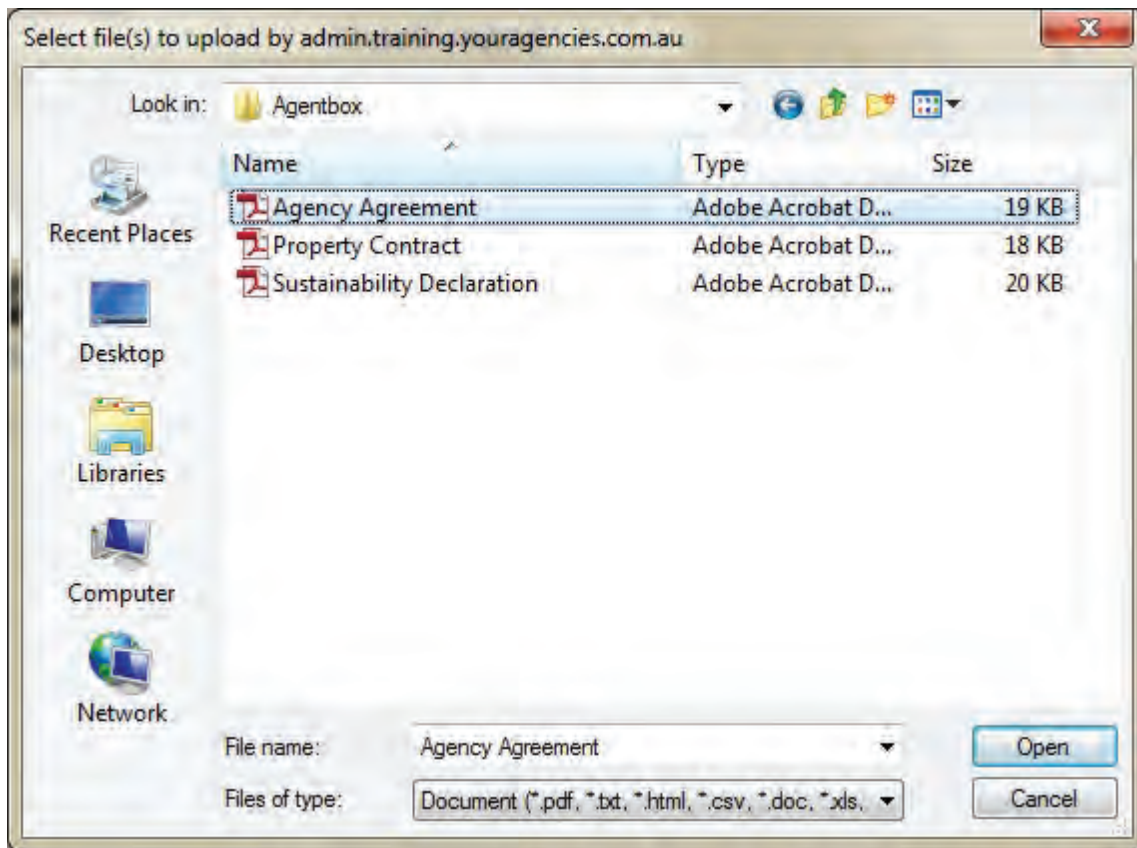
Clear List **Upload**

:: Selected Files ::

4. Click on Browse Files




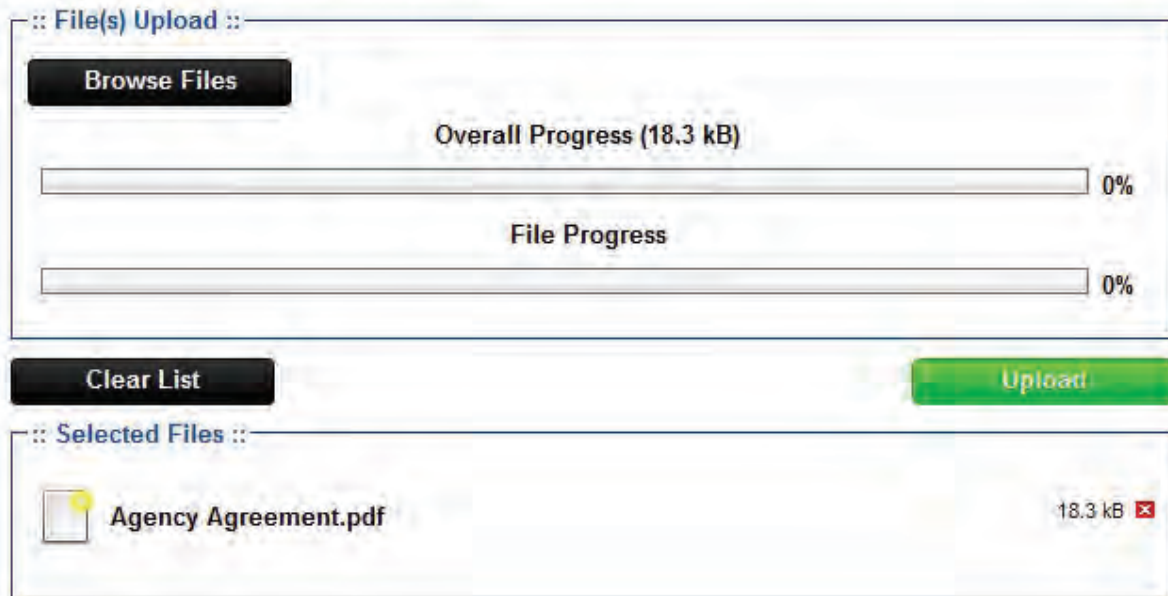
5. Select Document from your file



6. Click on Open

7. The Document will appear in a list on screen

Click the 'Browse Files' button to go and select the files you wish to upload from your local computer. Then select 'Upload' to confirm the files to publish. 



8. Click on Upload

Click the 'Browse Files' button to go and select the files you wish to upload from your local computer. Then select 'Upload' to confirm the files to publish.



:: File(s) Upload ::

Browse Files

Overall Progress (18.3 kB)

97%

File Progress "Agency Agreement.pdf"

97%

Upload complete!

Clear List **Upload**

:: Selected Files ::

Processing uploaded file, please wait...

9. You will be directed back to the Document Resources tab

:: Listing : #1P0008 - 654 Victoria Street, Sydney



Full View


General | For Sale | Features | OFI | Agents & Contacts | **Resources** | Commission

Property Photos | Floorplans | **Documents** | Links

:: Agency Agreement * ::

Agreement Upload Please ensure that a document does not exceed **5MB** in filesize.

 **View** 

 Agency Agreement.pdf | Updated 30th Nov, 2011 | 18.3 KB

:: Property Contract * ::

Contract Upload Please ensure that a document does not exceed **5MB** in filesize.

:: Sustainability Declaration ::

Declaration Upload Please ensure that a document does not exceed **5MB** in filesize.

:: Other Documents ::

Document(s) Upload Please ensure that a document does not exceed **5MB** in filesize.

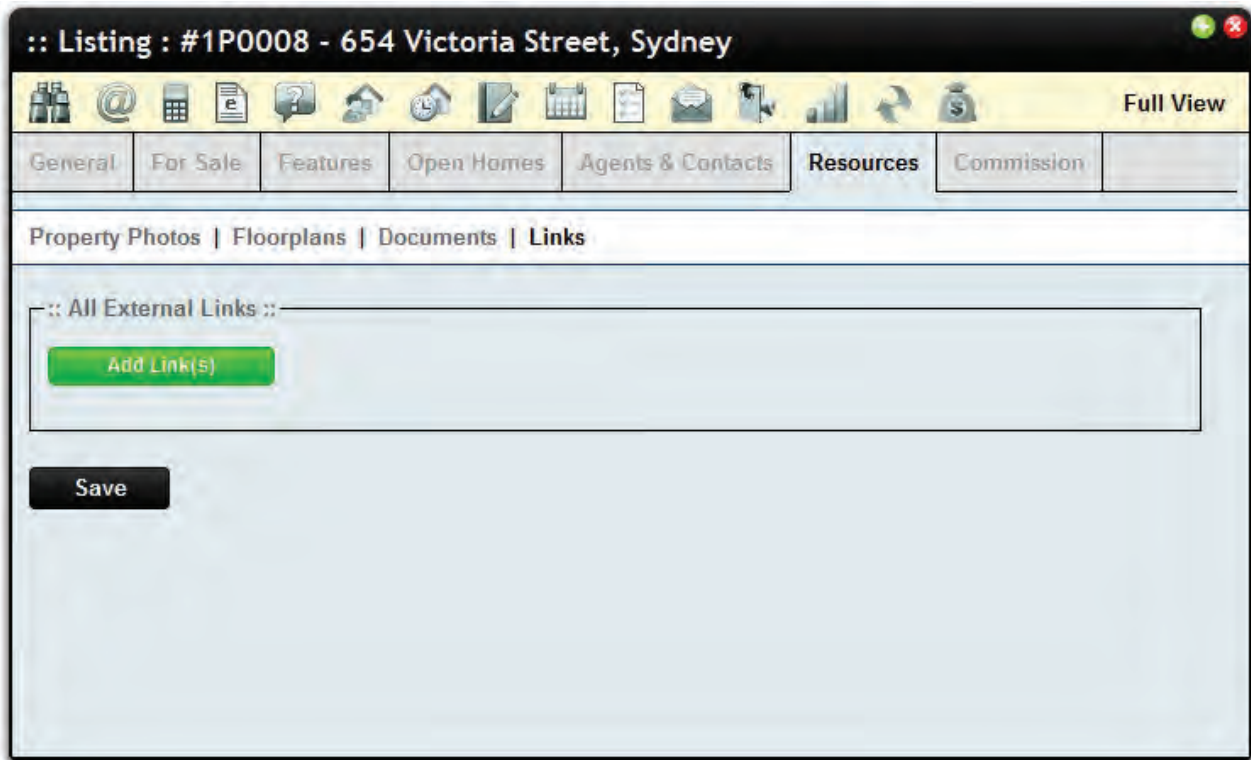
Save

10. Click on Save

Links

How do I add a Link to a Property in Agentbox?

1. [Search for your Property](#) and open the [Resources Tab](#) on the [Property Card](#)
2. Click on Links on the sub resources tab



3. Click Add Link(s)
4. Enter a Link URL, link title and select the type of link from the link type drop down.



5. Click Save
- *Note: how these links will display on your website/portals depends on your set up.*

OFI

How do I add Open For Inspection times?

1. [Search for your Property](#) and open the [Property Card](#)

:: Listing : ID#1P0001 - 1 Jones Street, Copacabana

Full View

General | For Sale | Features | OFI | Agents & Contacts | Resources | Commission

Status: Available

For Sale/Rental: For Sale

Type: * Residential

Category: * House

Investment?:

Sale Method: Private Treaty

Authority: Exclusive

Property Name:

Level No.: Unit No.: Street No.: 1

Street Name: * Jones Street Type: * Street

Suburb: * COPACABANA (2251) State: * NSW

Hide Address?: Tick to hide the address on your web site.
 Tick to edit address for your web display format.

Address Format: 1 Jones Street

Google Map: [Re-Position Marker](#) Hide Street View Hide "What's around"

[Copy This Property](#)
[Vendor Preview Link](#)

Save

2. Click on the OFI tab

:: Listing : #1P0001 - 1 Jones Street, Copacabana

Full View

General For Sale Features **OFI** Agents & Contacts Resources Commission

Open Date: 24 11 2011 Open From: 10 00 AM To: 10 00 PM

[Add Open Time](#)

Open Type:

:: Upcoming Inspection Times ::

No inspection data has been entered.

:: Past Inspections ::

No inspection data has been entered.

[Save](#)

3. Enter in the date and time of the open time and click the green Add Open Time button

:: Listing : #1P0001 - 1 Jones Street, Copacabana

Full View

General For Sale Features **OFI** Agents & Contacts Resources Commission

Open Date: 7 12 2011 Open From: 10 00 AM To: 10 30 AM

[Add Open Time](#)

Open Type:

:: Upcoming Inspection Times ::

No inspection data has been entered.

:: Past Inspections ::

No inspection data has been entered.

[Save](#)

4. The open time will be added to the Upcoming inspections time box

:: Listing : #1P0001 - 1 Jones Street, Copacabana

Full View

General For Sale Features OFI Agents & Contacts Resources Commission

Open Date: 07 12 2011 Open From: 10 00 AM To: 10 30 AM

Add Open Time

Open Type:

:: Upcoming Inspection Times ::

Wednesday, 7th-Dec-2011 10:00 AM to 10:30 AM

:: Past Inspections ::

No inspection data has been entered.

Save

5. Click Save

How do I edit an OFI time in Agentbox?

1. You are unable to edit an open time. If you make a mistake simply follow the steps to Delete an OFI time (below), then Add an OFI time (above).

2. If you have incorrectly added an open time that has feedback attached, contact support@agentbox.com.au and they can get the time corrected for you without losing any related feedback.

How do I delete an OFI time in Agentbox?

1. [Search for your Property](#) and open the [Property Card](#)

:: Listing : ID#1P0001 - 1 Jones Street, Copacabana

Full View

General | For Sale | Features | OFI | Agents & Contacts | Resources | Commission

Status: Available

For Sale/Rental: For Sale

Type: * Residential

Category: * House

Investment?:

Sale Method: Private Treaty

Authority: Exclusive

Property Name:

Level No.: Unit No.: Street No.: 1

Street Name: * Jones Street Type: * Street

Suburb: * COPACABANA (2251) State: * NSW

Hide Address?: Tick to hide the address on your web site.
 Tick to edit address for your web display format.

Address Format: 1 Jones Street

Google Map: [Re-Position Marker](#) Hide Street View Hide "What's around"

[Copy This Property](#)
[Vendor Preview Link](#)

[Save](#)

2. Click on the OFI tab

3. The open times will appear in the Upcoming inspections time box or the Past inspections box. Click the red x next to the corresponding open time to delete the record.

**Note: if you delete a past inspection time, you will also delete any related feedback that was entered.*

:: Listing : #1P0001 - 1 Jones Street, Copacabana

Full View

General For Sale Features **OFI** Agents & Contacts Resources Commission

Open Date: 07 12 2011 Open From: 10 00 AM To: 10 30 AM

Open Type:

:: Upcoming Inspection Times ::

Wednesday, 7th-Dec-2011 10:00 AM to 10:30 AM

:: Past Inspections ::

No inspection data has been entered.

5. Click Yes

Warning!

If you delete this OFI time all related buyer feedback will be lost. Click Yes to proceed

6. Click Save

Add Project

How do I enter a Project into Agentbox?

1. Click on the Properties icon from the Main Menu



2. Click on Add a Project/Development from the Property Panel

Properties

Available Inspections Off Market

Enter a keyword or fill in property options below. Your search will auto filter your property results.

Address:

For: Type:

Features:

From \$: To \$:

Order:

[Advanced Search](#)

- Add a Property
- Add a Project / Development
- Add an Appraisal / Prospect Property

:: Project : Create

Step 1 of 5 - Complete Project Overview

Overview	Features	Agents & Contacts	Resources	Add/Edit Lots/Listings
Status:	<input type="text" value="Offline"/>			
Category: *	<input type="text" value="Apartment Complex / Ur"/>			
Authority:	<input type="text" value="Exclusive"/>			
Display Price(\$):	<input type="text"/>			
Contract Expiry:	<input type="text" value="29"/>	<input type="text" value="11"/>	<input type="text" value="2011"/>	<input type="text"/>
Project Stage:	<input type="text" value="Completed"/>			
Project Name:	<input type="text"/>			
Street No.:	<input type="text"/>			
Street Name: *	<input type="text"/>	Street Type: *	<input type="text"/>	
Suburb: *	<input type="text"/>	State: *	<input type="text"/>	
Address Format:	<input type="text"/>			
	<input type="checkbox"/> Tick to edit address for your web display format.			
Google Map:	<input type="button" value="Re-Position Marker"/>			
Hide Address?:	<input type="checkbox"/> Tick to hide the address on your web site.			
Key to Property?:	<input type="checkbox"/>			
Access Details.:	<input type="text"/>			

3. Enter Property Information:

- * Category: Block of Units, House & Land, Land Estate
- * Authority: Exclusive, Open, Conjunction
- * Display Price: *Numeric Value Only*
- * Contract Expiry
- * Project Stage
- * Project Name
- * Project Address
- * Edit Address Format for your web display format
- * Re-Position Google Map Marker
- * Hide Address on your website
- * Key to Property?
- * Access Details

:: Project : ID#1J0002 - Norton Street, COOGEE (2034)

Step 1 of 4 - Complete Project Overview

Overview	Features	Agents & Contacts	Resources	Add/Edit Lots/Listings
Status:	<input type="text" value="Offline"/>			
Category: *	<input type="text" value="Apartment Complex / Ur"/>			
Authority:	<input type="text" value="Exclusive"/>			
Display Price(\$):	<input type="text" value="Contact Agent"/>			
Contract Expiry:	<input type="text" value="30"/>	<input type="text" value="01"/>	<input type="text" value="2012"/>	<input type="button" value="Calendar"/>
Project Stage:	<input type="text" value="Completed"/>			
Project Name:	<input type="text" value="Aqua View"/>			
Street No.:	<input type="text"/>			
Street Name: *	<input type="text" value="Norton"/>	Street Type: *	<input type="text" value="Street"/>	
Suburb: *	<input type="text" value="COOGEE (2034)"/>	State: *	<input type="text" value="NSW"/>	
Address Format:	<input type="text" value="Norton Street"/>			
	<input type="checkbox"/> Tick to edit address for your web display format.			
Google Map:	<input type="button" value="Re-Position Marker"/>			
Hide Address?:	<input checked="" type="checkbox"/> Tick to hide the address on your web site.			
Key to Property?:	<input type="checkbox"/>			
Access Details.:	<input type="text"/>			

4. Click on Save & Proceed

5. Enter Features of the Project: Main Headline, Project Description and Features of the Project

:: Project : #1J0002 - Norton Street, Coogee

Step 2 of 4 - Complete Features and Description

Overview **Features** Agents & Contacts Resources Add/Edit Lots/Listings

Main Headline:

Characters typed in so far: (max = 150 characters)

Project Description:

Characters typed in so far: (max = 2500 characters)

Features:

<input type="checkbox"/> Air Conditioning	<input type="checkbox"/> Lift Installed
<input type="checkbox"/> Alarm System	<input type="checkbox"/> Ocean Views
<input type="checkbox"/> Area Views	<input type="checkbox"/> Open Fire Place
<input type="checkbox"/> Beach Front	<input type="checkbox"/> Penthouse
<input type="checkbox"/> Built-In Wardrobes	<input type="checkbox"/> Pets Allowed
<input type="checkbox"/> Bush Retreat	<input type="checkbox"/> Pool
<input type="checkbox"/> City Views	<input type="checkbox"/> Prestige Homes

« Previous Step **Save & Proceed »**

6. Click on Save & Proceed

7. Add related Agents & Contacts

Step 3 of 4 : Specify Agents & Contacts related to this project transaction

Overview	Features	Agents & Contacts	Resources	Add/Edit Lots/Listings
----------	----------	------------------------------	-----------	------------------------

:: Assign related Agents ::

Role: (uncheck to de-select)

Agent:

Selected Agents:

- John Smith (Listing Agent)
- Add New Staff...

Appear on Site:

:: Assign related Contacts ::

Role: (uncheck to de-select)

Contact:

Selected Agents:

:: Project : #1J0002 - Norton Street, Coogee

Step 3 of 4 : Specify Agents & Contacts related to this project transaction

Overview | Features | **Agents & Contacts** | Resources | Add/Edit Lots/Listings

Selected Agents: John Smith (Listing Agent)

Appear on Site: John Smith (Listing Agent)

:: Assign related Contacts ::

Role: (uncheck to de-select)

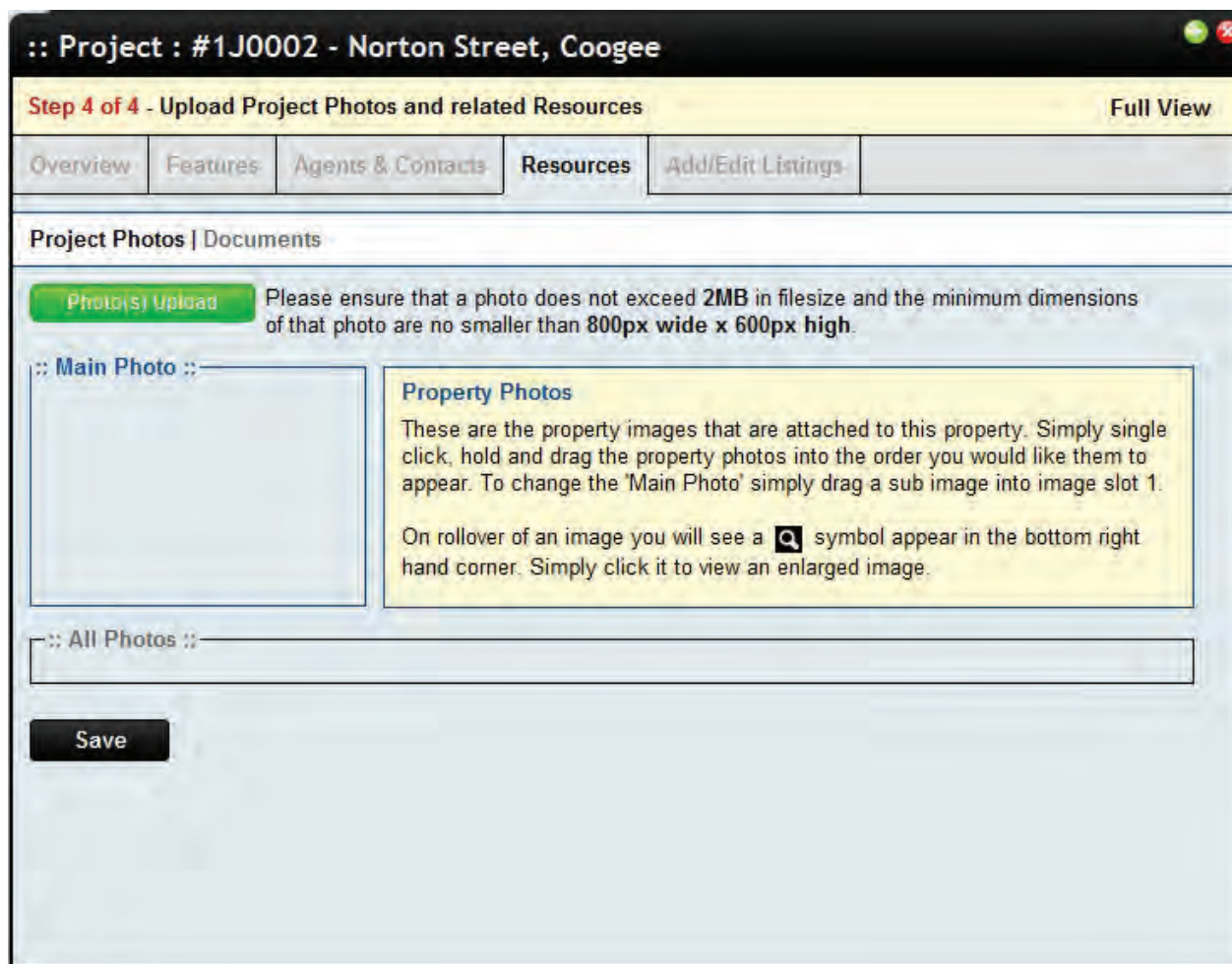
Contact:

Selected Agents: Gary Brown (Vendor)

8. Click on Save & Proceed

9. Upload Project photos and Documents under the Resources tab

**Note: Your Agency Agreement and Sustainability Declaration must be uploaded into Agentbox before your property can be displayed live on the web in QLD
Your Agency Agreement and Contract for Sale must be uploaded into Agentbox before your property can be displayed live on the web in NSW and VIC.*



10. Click Save

Add Properties to a Project

How do I add a Property to a Project?

1. [Search for your Project](#) and open the Project card.

:: Project : ID#1J0002 - Norton Street, COOGEE (2034) Full View

Overview | Features | Agents & Contacts | Resources | Add/Edit Listings

Status:

Category: *

Authority:

Display Price(\$):

Contract Expiry:

Project Stage:

Project Name:

Street No.:

Street Name: * Street Type: *

Suburb: * State: *

Address Format:

Tick to edit address for your web display format.

Google Map:

Hide Address?: Tick to hide the address on your web site.

Key to Property?:

Access Details.:

2. Click on the Add/Edit Listings tab

:: Project : #1J0002 - Norton Street, Coogee

Full View

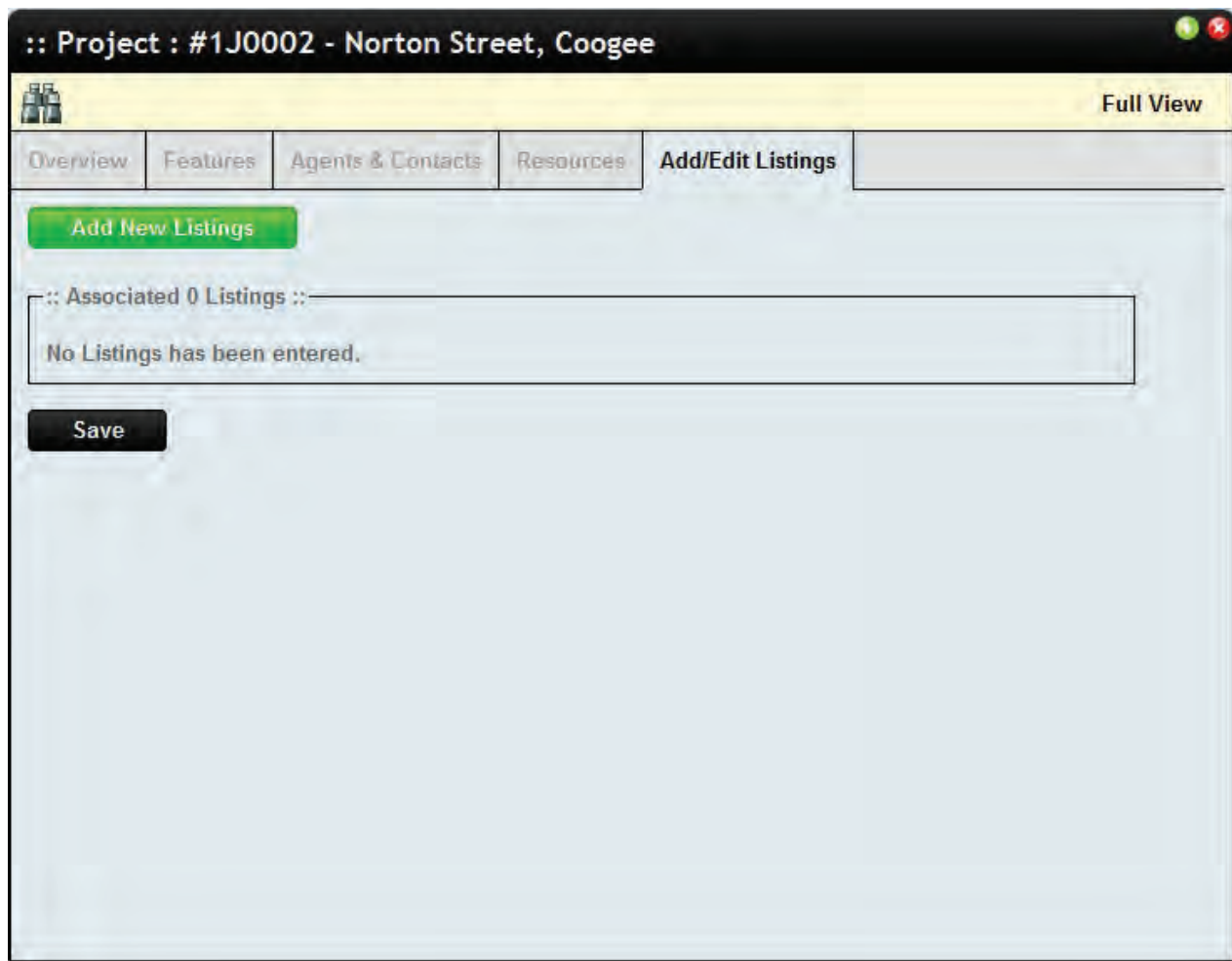
Overview Features Agents & Contacts Resources Add/Edit Listings

Add New Listings

:: Associated 0 Listings ::

No Listings has been entered.

Save



3. Click on Add New Listing

:: Listing : Create

Step 1 of 6 - Complete General Information

General | For Sale/Lease | Features | OFI | Agents & Contacts | Resources

Status:

For Sale/Rental:

Type: *

Category: *

Investment?:

Sale Method:

Authority:

Property Name:

Level No.: Unit No.: Street No.:

Street Name: * Street Type: *

Suburb: * State: *

Hide Address?: Tick to hide the address on your web site.
 Tick to edit address for your web display format.

Address Format:

Google Map: Hide Street View Hide "What's around"

Key to Property?:

Access Details.:

4. Complete fields on all tabs for [entering a Property](#). You will notice the Project Address is automatically populated.

5. Once you have completed these tabs, the property will be added to the project list.

Project - ID#1J0002

[Back to Properties](#)

Associated 1 Listings

- ID #1P0009 - Level 1, Unit 1/12 Norton Street
[More Detail >](#)

[Recent Inspections](#)
[Project Modifications](#)
[Help Text](#)

:: Project : #1J0002 - Norton Street, Coogee

Full View

Overview | Features | Agents & Contacts | Resources | **Add/Edit Listings**

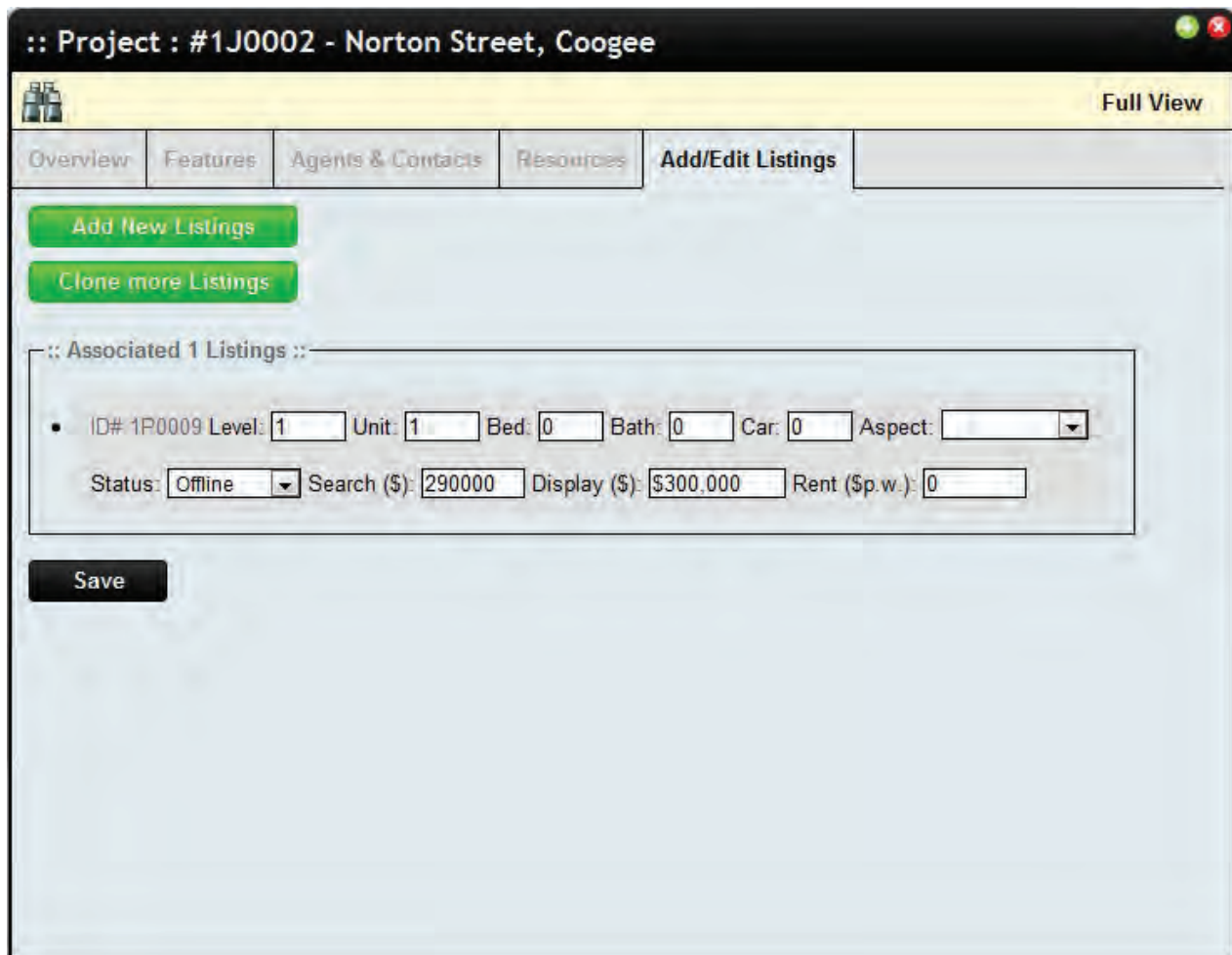
Associated 1 Listings ::

- ID# 1P0009 Level: Unit: Bed: Bath: Car: Aspect:

Status: Search (\$): Display (\$): Rent (\$p.w.):

How do I Duplicate Properties to a Project in Agentbox?

1. Search for your Project and open the project card
2. Click on Add/ Edit Listings



:: Project : #1J0002 - Norton Street, Coogee

Full View

Overview Features Agents & Contacts Resources **Add/Edit Listings**

Add New Listings

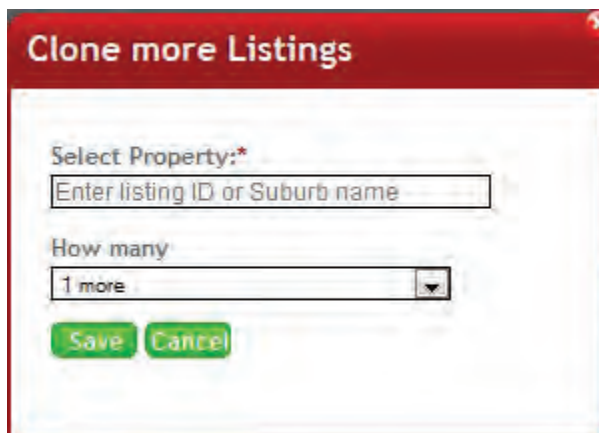
Clone more Listings

:: Associated 1 Listings ::

- ID# 1P0009 Level: Unit: Bed: Bath: Car: Aspect:
Status: Search (\$): Display (\$): Rent (\$p.w.):

Save

3. Click on Clone More Listings



Clone more Listings

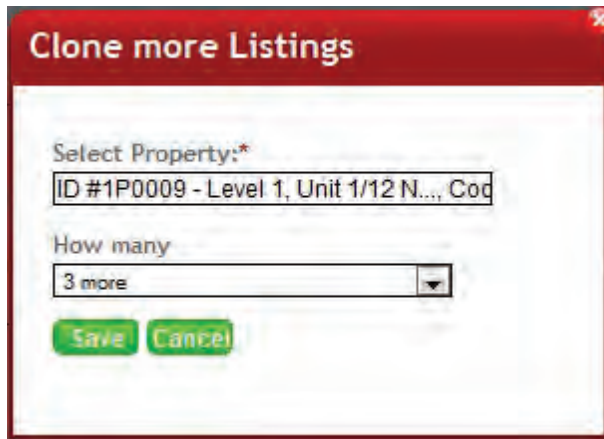
Select Property:*

How many

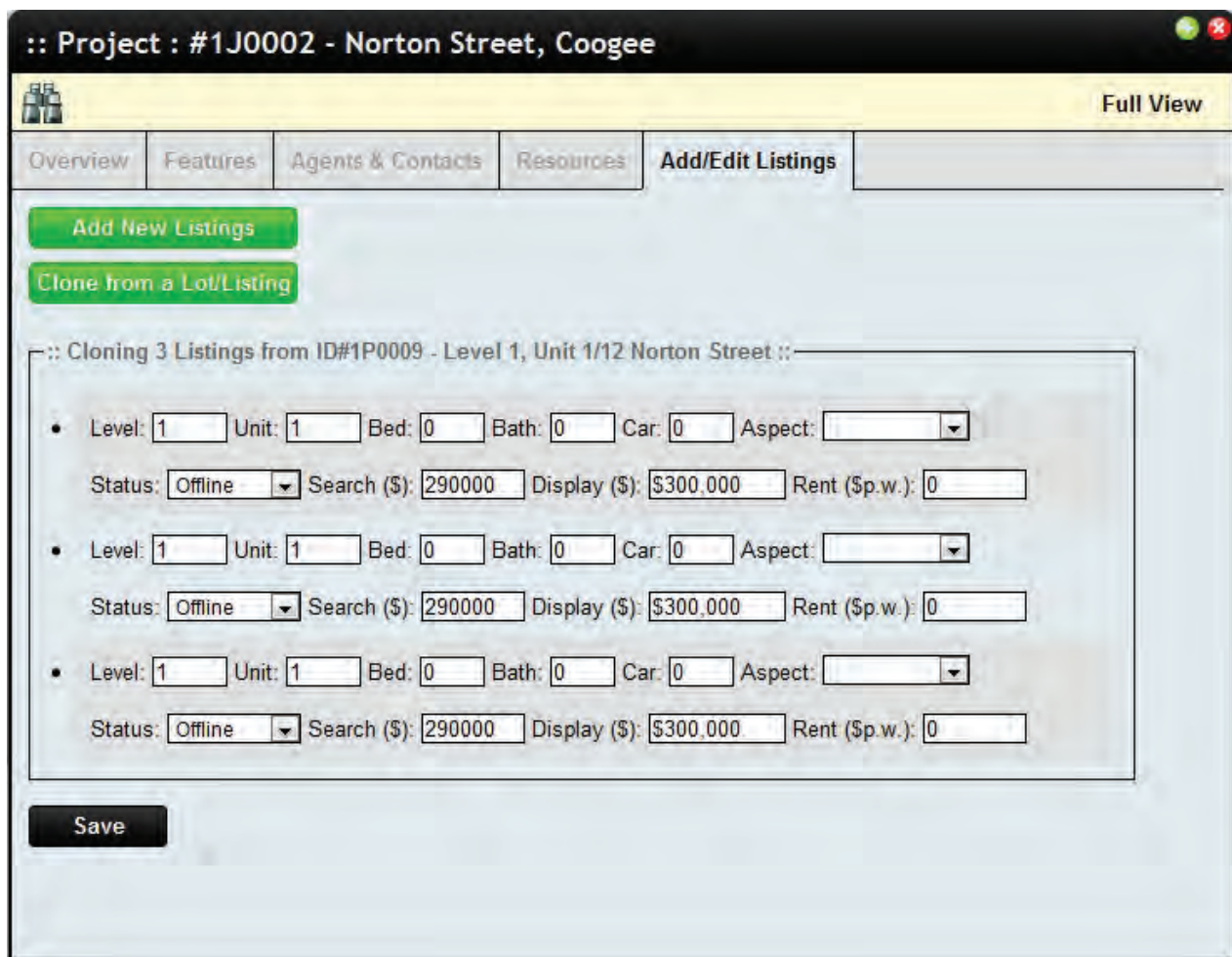
Save **Cancel**

4. Select Property to Clone

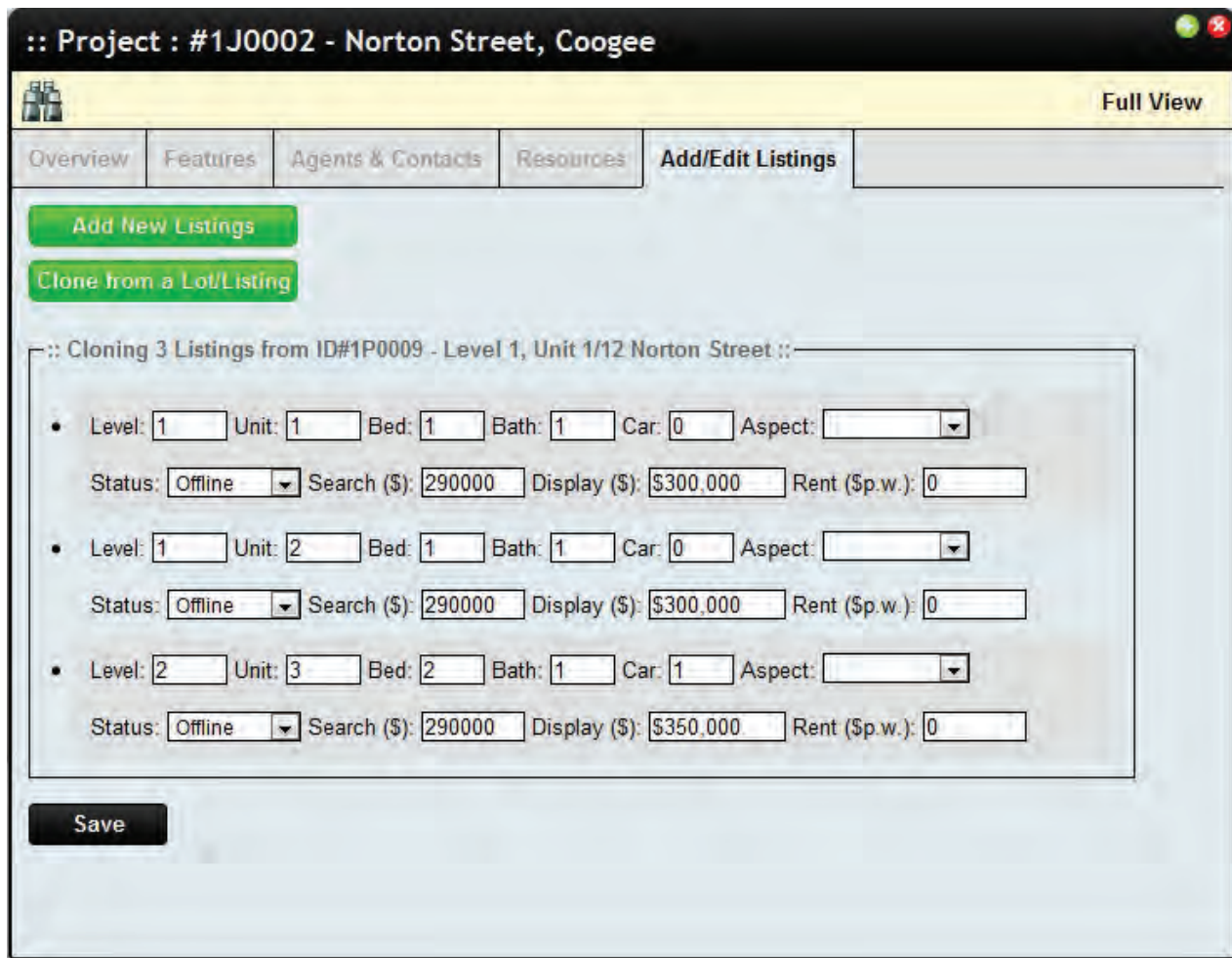
5. Select Number of Properties to clone



6. Click on Save

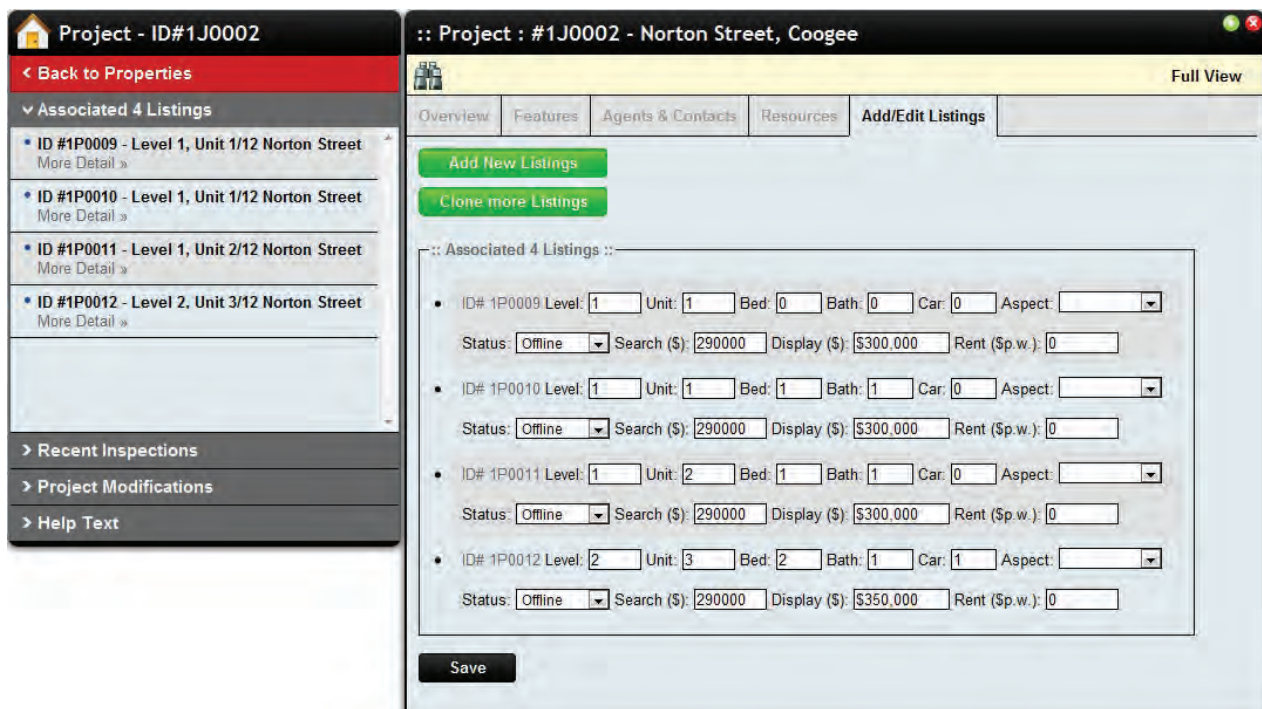


7. Enter alterations for new property, e.g Unit number



8. Click on Save

9. New Listings will appear on screen and also under the Associated Listing tab on the Left Project Panel



13. Click on More Detail to view the Property Card for each Property

Search for Property

How can I search for my Property?

There are three ways in which to search for a property:

- Through the [Left Panel Fast Find](#)
- Through the [Universal Search Bar](#)
- Through an [Advanced Property Search](#)

[Left Panel Fast Find](#)

1. Click on the Properties Icon from the main menu



2. Tab across to search either your Available, Upcoming Inspections or Off Market properties

A screenshot of a web application's "Properties" search interface. At the top, there's a header with a house icon and the word "Properties". Below this is a navigation bar with three tabs: "Available", "Inspections", and "Off Market". A yellow banner below the tabs contains the text: "Enter a keyword or fill in property options below. Your search will auto filter your property results." The main search area contains several input fields and dropdown menus: "Address:" with a text box and a placeholder "Enter Street, Suburb or ID"; "For:" with a dropdown menu set to "Sale"; "Type:" with a dropdown menu set to "Residential"; "Features:" with three checkboxes and icons for a bed, a bathtub, and a car; "From \$:" and "To \$:" with two text boxes; "Status:" with a dropdown menu set to "All"; and "Order:" with a dropdown menu set to "By Suburb". At the bottom of the search area are a "Search" button and a link for "Advanced Search". Below the search area is a dark grey sidebar with three options: "Add a Property", "Add a Project / Development", and "Add an Appraisal / Prospect Property".

3. Enter a Keyword in the Left Panel Search

The screenshot displays a real estate application interface. On the left, a sidebar titled "Properties" contains three tabs: "Available", "Inspections", and "Off Market". Below the tabs, a yellow banner reads: "Enter a keyword or fill in property options below. Your search will auto filter your property results. (1 found)". The search filters include: "Address:" with a text input containing "Victoria"; "For:" with a dropdown menu set to "Sale"; "Type:" with a dropdown menu set to "Residential"; "Features:" with three checkboxes and icons for a bed, a bathtub, and a car; "From \$:" and "To \$:" with empty text inputs; "Status:" with a dropdown menu set to "All"; and "Order:" with a dropdown menu set to "By Suburb". At the bottom of the filters are a "Search" button and a link for "Advanced Search". Below the filters are three menu items: "Add a Property", "Add a Project / Development", and "Add an Appraisal / Prospect Property". On the right, a panel titled "Property Results" shows a single property card for "ID #1P0008" located at "654 Victoria Street, Sydney". The card indicates "Offers above \$1.2 Million" and is marked as "OFFLINE".

4. Click on your Property from the Property Results List

5. Property Card will appear on screen

:: Listing : ID#1P0008 - 654 Victoria Street, Sydney

Full View

General For Sale Features OFI Agents & Contacts Resources Commission

Status: Offline

For Sale/Rental: For Sale

Type: * Residential

Category: * House

Investment?:

Sale Method: Private Treaty

Authority: Exclusive

Property Name:

Level No.: Unit No.: Street No.: 654

Street Name: * Victoria Street Type: * Street

Suburb: * SYDNEY (2000) State: * NSW

Hide Address?: Tick to hide the address on your web site.
 Tick to edit address for your web display format.

Address Format: 654 Victoria Street

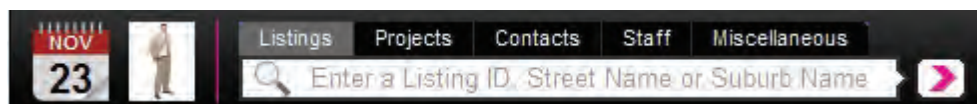
Google Map: Re Position Marker Hide Street View Hide "What's around"

Copy This Property
Vendor Preview Link

Save

Universal Search Bar

1. Click on Listings from the [Universal Search Bar](#) at the top of the screen



2. Enter [Listing ID](#), Street Number, Name or Suburb Name

3. A list of properties will appear in a drop down



4. Click on the Property Photo, address or the Search arrow  to open the property card

:: Listing : ID#1P0008 - 654 Victoria Street, Sydney

Full View

General | For Sale | Features | OFI | Agents & Contacts | Resources | Commission

Status:

For Sale/Rental:

Type: *

Category: *

Investment?:

Sale Method:

Authority:

Property Name:

Level No.: Unit No.: Street No.:


Street Name: * Street Type: *

Suburb: * State: *

Hide Address?: Tick to hide the address on your web site.
 Tick to edit address for your web display format.

Address Format:

Google Map: Hide Street View Hide "What's around"

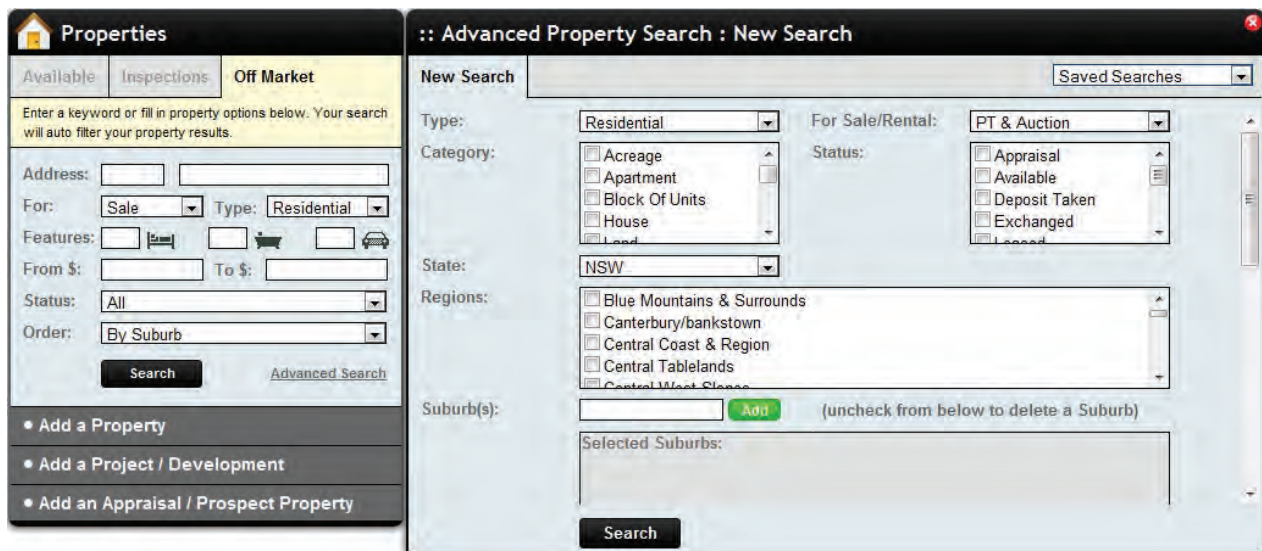


Advanced Property Search

1. Click on the Properties icon from the Main Menu



2. Click on Advanced Search on the Left Panel



3. For further instructions please follow the steps under the [Advanced Property Search](#) topic.

Search for Projects

How do I search for Projects in Agentbox?

There are three ways in which to search for a Project:

- Through the [Left Panel Fast Find](#)
- Through the [Universal Search Bar](#)
- Through an [Advanced Property Search](#)

[Left Panel Fast Find](#)

1. Click on the Properties icon from the main menu



2. Tab across to search either your available, upcoming inspections or Off Market projects




Properties

Available | Inspections | Off Market

Enter a keyword or fill in property options below. Your search will auto filter your property results.

Address:

For: Type:

Features:   

From \$: To \$:

Order:

[Advanced Search](#)

- Add a Property
- Add a Project / Development
- Add an Appraisal / Prospect Property

3. Click on the Type drop down and select Project

4. Click on Search

The screenshot displays a web application interface with two main panels. The left panel, titled "Properties", features a navigation bar with "Available", "Inspections", and "Off Market" tabs. Below the tabs, a search instruction reads: "Enter a keyword or fill in property options below. Your search will auto filter your property results. (1 found)". The search form includes an "Address:" field with the text "ocean", a "For:" dropdown set to "Sale", a "Type:" dropdown set to "Project", "From \$:" and "To \$:" input fields, a "Status:" dropdown set to "All", and an "Order:" dropdown set to "By Suburb". A "Search" button and a link for "Advanced Search" are positioned below the form. At the bottom of the left panel, there are three menu items: "Add a Property", "Add a Project / Development", and "Add an Appraisal / Prospect Property". The right panel, titled "Project Results", shows a single project entry with the following details: "ID #1J0001", "Ocean Avenue", "Manly", and a red "OFFLINE" status indicator. The panel is currently empty of other project results.

6. Click on the Project of your choice from the Project Results Panel

7. Your Project will appear on screen

:: Project : ID#1J0001 - Ocean Avenue, MANLY (2095) Full View

Overview | Features | Agents & Contacts | Resources | Add/Edit Listings

Status:

Category: *

Authority:

Display Price(\$):

Contract Expiry:

Project Stage:

Project Name:

Street No.:

Street Name: * Street Type: *

Suburb: * State: *

Address Format:


Tick to edit address for your web display format.

Google Map:

Hide Address?: Tick to hide the address on your web site.

Key to Property?:

Access Details.:



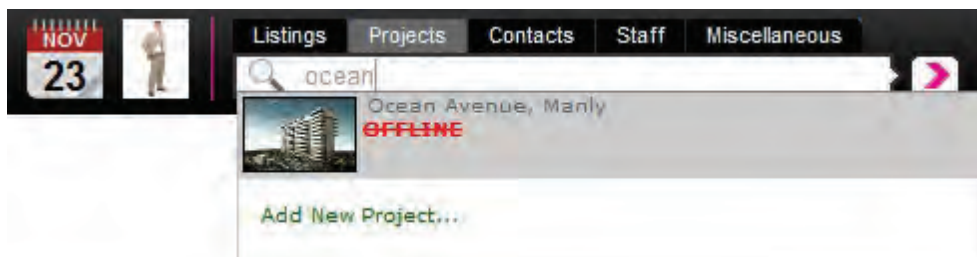
Universal Search Bar


1. Click on Projects from the [Universal Search Bar](#) at the top of the screen



2. Enter Project Name, Project ID or Suburb Name

3. A list of Projects will appear in a drop down



4. Click on the Project Photo, address or the Search arrow  to open the project.

:: Project : ID#1J0001 - Ocean Avenue, MANLY (2095) Full View

Overview | Features | Agents & Contacts | Resources | Add/Edit Listings

Status:

Category: *

Authority:

Display Price(\$):

Contract Expiry:

Project Stage:

Project Name:

Street No.:

Street Name: * Street Type: *

Suburb: * State: *

Address Format:


Tick to edit address for your web display format.

Google Map:

Hide Address?: Tick to hide the address on your web site.

Key to Property?:

Access Details.:



[Advanced Property Search](#)

1. Click on Properties icon from the main menu

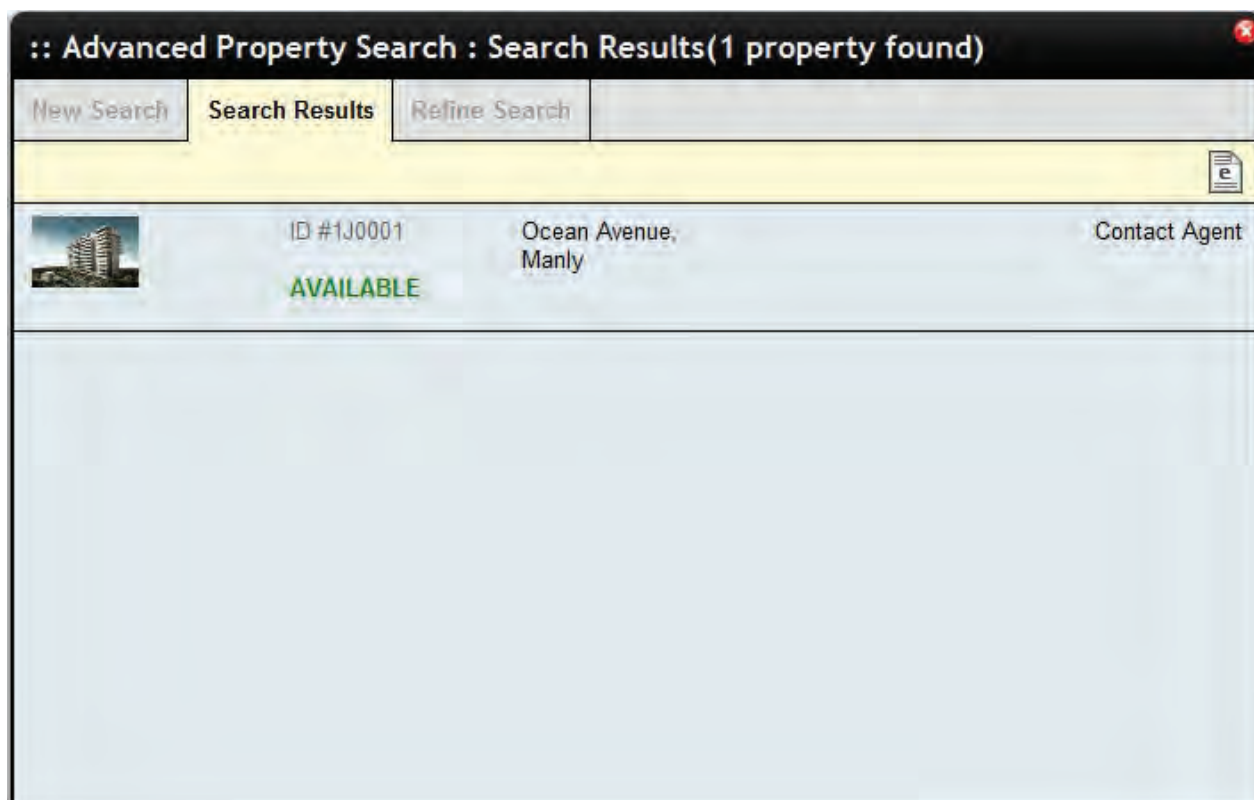


2. Click on Advanced Search from the left property search panel

3. Enter your Search Criteria into the appropriate fields. You can search by:

- * Type: **Project**
- * Category: Apartment Complex / Units, House & Land Packages, Land Estate
- * Status: Appraisal, Available, Deposit Taken, Exchanged, Leased, Offline, Prospect, Sold, Under Contract, Under Offer
- * State: ACT, NSW, NT, QLD, SA, TAS, VIC, WA
- * Regions: e.g Northern Suburbs, Western Suburbs
- * Suburbs:
- * Price, Bathrooms, Parking
- * Assigned Staff
- * Date Range for 'last modified' , 'on market' and 'sold date' lookups

4. Click on Search



5. Click on the Project of your choice from the Search Results Panel

Search for Appraisal Properties

How do I Search for Appraisal Properties in Agentbox?

There are three ways in which to search for an Appraisal property:


- Through the [Left Panel Fast Find](#)
- Through the [Universal Search Bar](#)
- Through an [Advanced Property Search](#)

[Left Panel Fast Find](#)

1. Click on the Properties icon from the main menu



2. Select the Off Market tab




 **Properties**

Available Inspections **Off Market**

Enter a keyword or fill in property options below. Your search will auto filter your property results.

Address:

For: Type:

Features:   

From \$: To \$:

Status:

Order:

 [Advanced Search](#)

- Add a Property
- Add a Project / Development
- Add an Appraisal / Prospect Property

3. Click on the Status drop down and select Appraisal

4. Click on Search

Properties

Available
Inspections
Off Market

Enter a keyword or fill in property options below. Your search will auto filter your property results. **(2 found)**

Address:

For: Sale Type: Residential

Features:

From \$: To \$:

Status: Appraisal

Order: By Suburb

Search
Advanced Search

- Add a Property
- Add a Project / Development
- Add an Appraisal / Prospect Property

Property Results

ID #1P0006
14 Mars Lane
Copacabana
APPRAISAL

ID #1P0007
1 Jones Boulevard
Copacabana
APPRAISAL

6. Click on the Appraisal of your choice from the Property Results Panel

7. Your Appraisal property will appear on screen

:: Appraisal : #1P0006 - 14 Mars Lane, COPACABANA (2251)

Full View

Appraisal Agents & Contacts Custom Info Resources

:: Property to Appraise ::

Status: For Sale/Rental:

Type: *

Category: *

Property Name:

Level No.: Unit No.: Street No.:

Street Name: * Street Type: *

Suburb: * State: *

Address Format:

Tick to edit address for your web display format.

Google Map:

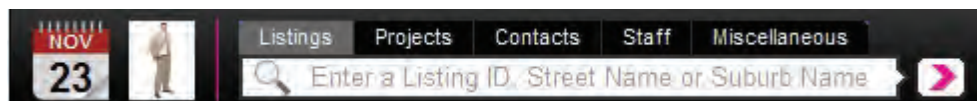
:: Appraisal Info ::

Price From(\$): Price To(\$):

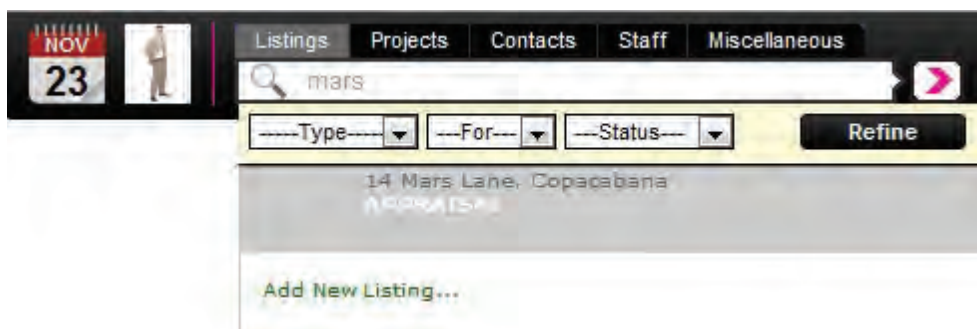
Appraisal Price(\$): * Appraisal For:


Universal Search Bar

1. Click on Listings from the [Universal Search Bar](#) at the top of the screen



2. Enter [Listing ID](#), Street Number, Name or Suburb Name
3. Select Appraisal from the Status dropdown and click Refine to refine your search
4. A list of Appraisals will appear in a drop down



5. Click on the Appraisal Property address or the Search arrow  to open the property card

:: Appraisal : #1P0006 - 14 Mars Lane, COPACABANA (2251)

Full View

Appraisal Agents & Contacts Custom Info Resources

:: Property to Appraise ::

Status: For Sale/Rental:

Type: *

Category: *

Property Name:

Level No.: Unit No.: Street No.:

Street Name: * Street Type: *

Suburb: * State: *

Address Format:

Tick to edit address for your web display format.

Google Map:

:: Appraisal Info ::

Price From(\$): Price To(\$):

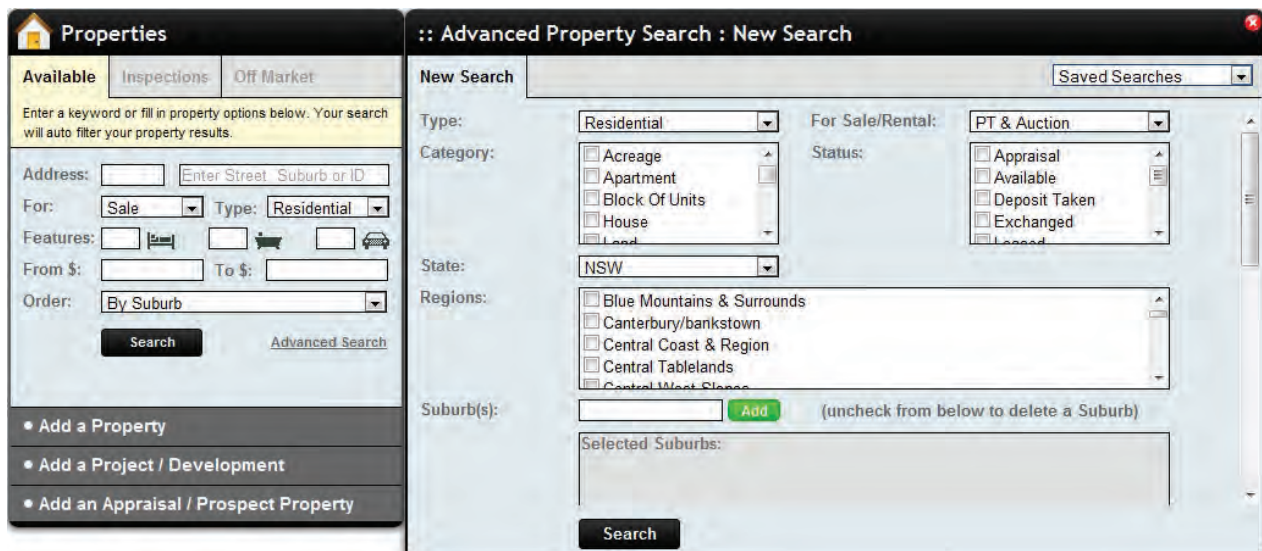
Appraisal Price(\$): * Appraisal For:

[Advanced Property Search](#)

1. Click on Properties icon from the main menu



2. Click on Advanced Search from the left property search panel



3. Enter your Search Criteria into the appropriate fields. You can search by:

- * Type: Residential, Rural, Commercial, Holiday
- * For Sale/Rent: PT & Auction, Rent, Sale Only, Auction Only
- * Category:
 - Residential: Acreage, Units, Block of Units, Development, House, Land, Semi/Duplex, Studio, Terrace, Townhouse, Unit, Villa
 - Rural: Acreage, Cropping, Dairy, Farmlet, Horticulture, House, Land, Livestock, Mixed Farming, Other, Townhouse, Villa, Viticulture
 - Commercial: Development, Factory, Hotel/Leisure, Medical/Consulting, Mixed Farming, Office, Retail, Showroom, Warehouse
 - Holiday: Alpine, Apartment, Backpacker Hostel, Bed and Breakfast, Campground, Caravan Holiday Park, Executive Rental, Farm Stay, Flat, House
Boat, Lodge, Motel, Other, Resort, Retreat, Self Contained Cottage, Semi/Duplex, Serviced Apartments, Studio, Terrace, Townhouse, Unit
 - Business: Development, Factory, Office, Retail, Showroom, Warehouse
- * Status: **Appraisal**
- * State: ACT, NSW, NT, QLD, SA, TAS, VIC, WA
- * Regions: e.g Northern Suburbs, Western Suburbs
- * Suburbs:
- * Price, Bedrooms, Bathrooms, Parking
- * Assigned Staff
- * Date Range for 'last modified' , 'on market' and 'sold date' lookups

:: Advanced Property Search : New Search

New Search Saved Searches

Type: Residential For Sale/Rental: PT & Auction

Category:

- Acreage
- Apartment
- Block Of Units
- House
- Land

Status:

- Appraisal
- Available
- Deposit Taken
- Exchanged
- Leased

State: NSW

Regions:

- Blue Mountains & Surrounds
- Canterbury/bankstown
- Central Coast & Region
- Central Tablelands
- Central West Slopes

Suburb(s): Add (uncheck from below to delete a Suburb)

Selected Suburbs:

Search

4. Click on Search

:: Advanced Property Search : Search Results(2 properties found)

New Search Search Results Refine Search

ID #1P0006 14 Mars Lane, Copacabana APPRAISAL
ID #1P0007 1 Jones Boulevard, Copacabana APPRAISAL

5. Click on the Appraisal property of your choice from the Search Results Panel

Search for Prospect Properties

How do I Search for Prospect Properties in Agentbox?

There are two ways in which to search for an Appraisal property:

- Through the [Left Panel Fast Find](#)
- Through an [Advanced Property Search](#)

[Left Panel Fast Find](#)

1. Click on the Properties icon from the main menu



2. Select the Off Market tab

A screenshot of the "Properties" search interface. At the top, there's a "Properties" header with a house icon. Below it are three tabs: "Available", "Inspections", and "Off Market" (which is highlighted in yellow). A yellow box contains the text: "Enter a keyword or fill in property options below. Your search will auto filter your property results." Below this are several search filters: "Address:" with two input boxes; "For:" with a dropdown menu set to "Sale"; "Type:" with a dropdown menu set to "Residential"; "Features:" with three checkboxes and icons for a bed, a truck, and a car; "From \$:" and "To \$:" with input boxes; "Status:" with a dropdown menu set to "All"; and "Order:" with a dropdown menu set to "By Suburb". At the bottom of the search area are a "Search" button and a link for "Advanced Search". Below the search area are three dark grey buttons with white text: "Add a Property", "Add a Project / Development", and "Add an Appraisal / Prospect Property".

3. Click on the Type drop down and select Prospect

4. Click on Search

Properties

Available Inspections **Off Market**

Enter a keyword or fill in property options below. Your search will auto filter your property results. **(1 found)**

Address:

For: Type:

Features:

From \$: To \$:

Status:

Order:

[Advanced Search](#)

- Add a Property
- Add a Project / Development
- Add an Appraisal / Prospect Property

Property Results

ID #2
54 Burns Road
Sydney
PROSPECT

6. Click on the Prospect property of your choice from the Property Results Panel

7. Your Prospect property will appear on screen

:: Prospect : #2 - 54 Burns Road, SYDNEY (2000) Full View

Prospect Agents & Contacts

:: Prospect Property ::

Status: For Sale/Rental:

Type: *

Category: *

Property Name:

Level No.: Unit No.: Street No.:

Street Name: * Street Type: *

Suburb: * State: *

Address Format:

Tick to edit address for your web display format.

Google Map:

:: Prospect Info ::

Last Sold Price(\$):

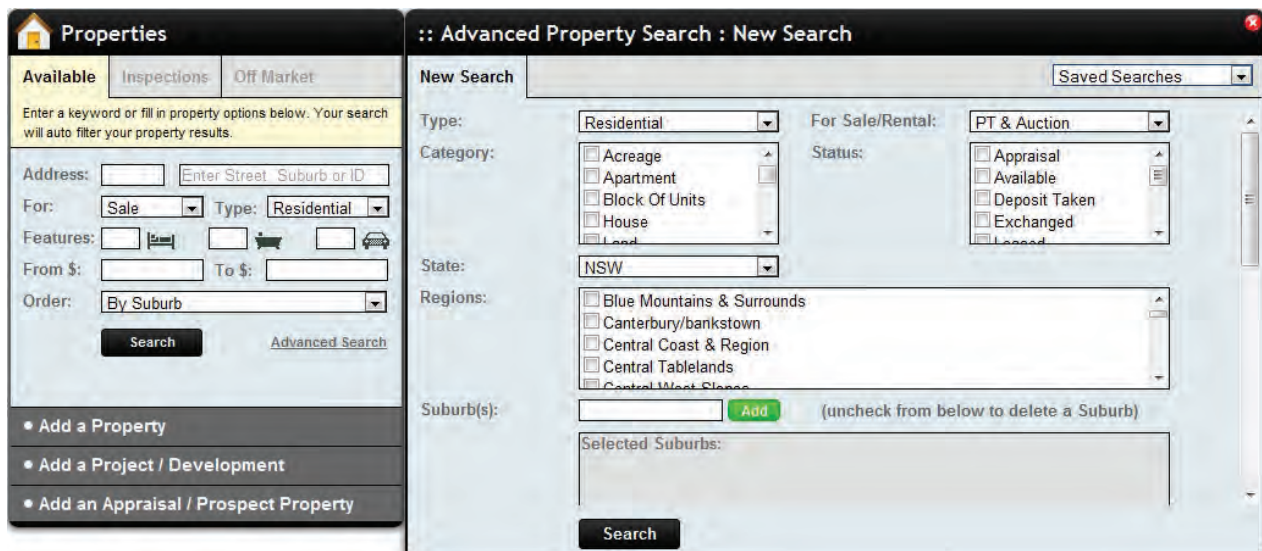
Prospecting Price(\$): Last Sold Date:

Advanced Property Search

1. Click on Properties icon from the main menu



2. Click on Advanced Search from the left property search panel



3. Enter your Search Criteria into the appropriate fields. You can search by:

* **Type: Prospect Properties**

* For Sale/Rent: PT & Auction, Rent, Sale Only, Auction Only

* **Category:**

Residential: Acreage, Units, Block of Units, Development, House, Land, Semi/Duplex, Studio, Terrace, Townhouse, Unit, Villa

Rural: Acreage, Cropping, Dairy, Farmlet, Horticulture, House, Land, Livestock, Mixed Farming, Other, Townhouse, Villa, Viticulture

Commercial: Development, Factory, Hotel/Leisure, Medical/Consulting, Mixed Farming, Office, Retail, Showroom, Warehouse

Holiday: Alpine, Apartment, Backpacker Hostel, Bed and Breakfast, Campground, Caravan Holiday Park, Executive Rental, Farm Stay, Flat, House

Boat, Lodge, Motel, Other, Resort, Retreat, Self Contained Cottage, Semi/Duplex, Serviced Apartments, Studio, Terrace, Townhouse, Unit

Business: Development, Factory, Office, Retail, Showroom, Warehouse

* Status: Appraisal, Available, Deposit Taken, Exchanged, Leased, Offline, Prospect, Sold, Under Contract, Under Offer

* State: ACT, NSW, NT, QLD, SA, TAS, VIC, WA

* Regions: e.g Northern Suburbs, Western Suburbs

* Suburbs:

* Price, Bedrooms, Bathrooms, Parking

* Assigned Staff

* Date Range for 'last modified' , 'on market' and 'sold date' lookups

:: Advanced Property Search : New Search

New Search Saved Searches

Type: For Sale/Rental:

Category: Acreage Apartment Block Of Units House Land

Status: Appraisal Available Deposit Taken Exchanged Leased

State:

Regions: Blue Mountains & Surrounds Canterbury/bankstown Central Coast & Region Central Tablelands Central West Slopes



Suburb(s): (uncheck from below to delete a Suburb)




Selected Suburbs:

4. Click on Search

:: Advanced Property Search : Search Results(1 property found)

New Search **Search Results** Refine Search

 3	ID #2	54 Burns Road, Sydney
 2	PROSPECT	
 1		

5. Click on the Prospect property of your choice from the Search Results Panel

:: Prospect : #2 - 54 Burns Road, SYDNEY (2000) Full View

Prospect Agents & Contacts

:: Prospect Property ::

Status: For Sale/Rental:

Type: *

Category: *

Property Name:

Level No.: Unit No.: Street No.:

Street Name: * Street Type: *

Suburb: * State: *

Address Format:

Tick to edit address for your web display format.

Google Map:

:: Prospect Info ::

Last Sold Price(\$):

Prospecting Price(\$): Last Sold Date:

Advanced Property Search

How do I perform an Advanced Property Search?

1. Click on the Property icon from the main menu



2. Click on Advanced Search from [Left Panel](#)













3. Enter your Search Criteria into the appropriate fields. You can search by:

- * Type: Residential, Rural, Commercial, Holiday, Business
- * For Sale/Rent: PT & Auction, Rent, Sale Only, Auction Only
- * Category: **Note: List of categories depends on the Property Type.*
 - Residential: Acreage, Units, Block of Units, Development, House, Land, Semi/Duplex, Studio, Terrace, Townhouse, Unit, Villa
 - Rural: Acreage, Cropping, Dairy, Farmlet, Horticulture, House, Land, Livestock, Mixed Farming, Other, Townhouse, Villa, Viticulture
 - Commercial: Development, Factory, Hotel/Leisure, Medical/Consulting, Mixed Farming, Office, Retail, Showroom, Warehouse
 - Holiday: Alpine, Apartment, Backpacker Hostel, Bed and Breakfast, Campground, Caravan Holiday Park, Executive Rental, Farm Stay, Flat, House
 - Boat, Lodge, Motel, Other, Resort, Retreat, Self Contained Cottage, Semi/Duplex, Serviced Apartments, Studio, Terrace, Townhouse, Unit
 - Business: Development, Factory, Office, Retail, Showroom, Warehouse
- * Status: Appraisal, Available, Deposit Taken, Exchanged, Leased, Offline, Prospect, Sold, Under Contract, Under Offer
- * State: ACT, NSW, NT, QLD, SA, TAS, VIC, WA
- * Regions: e.g Northern Suburbs, Western Suburbs
- * Suburbs:
- * Street No, Unit No, Level No, Street Name
- * Price, Bedrooms, Bathrooms, Parking
- * Features: Air Conditioning, Alarm System, Area Views, Beach Front, Built-In Wardrobes, Bush Retreat, City Views, Close to Schools, Close to Transport, Ensuite, Golf Course Estate, Heating Intercom, Lift Installed, Ocean Views, Open Fire Place, Penthouse, Pets Allowed, Pool, Prestige Homes, River Views, Security Access, Spa, Tennis Court, Vacuum System, Water Front, Water Views
- * Assigned Staff
- * Date Range for 'Last Modified' , 'On Market' and 'Sold Date' lookups
- * Save Search?

4. Click Search

:: Advanced Property Search : Search Results(4 properties found)

New Search | Search Results | Refine Search

	 3  4  2	ID #1P0001 AVAILABLE	1 Jones Street, Copacabana Michael Johnson (Vendor)	Contact Agent
	 3  2  2	ID #1P0002 AVAILABLE	Unit 6/12 Del Rio Drive, Copacabana Michael Johnson (Vendor)	Offers over \$950,000
		ID #1P0007 APPRAISAL	1 Jones Boulevard, Copacabana	
	 3  2  1	ID #1P0003 SOLD	52 Elizabeth Street, Surry Hills Thomas Train (Vendor)	Contact Agent

5. Click on the property of your choice from the Search Results Panel

:: Listing : ID#1P0001 - 1 Jones Street, Copacabana

Full View

General | For Sale | Features | Open Homes | Agents & Contacts | Resources | Commission

Status:

For Sale/Rental:

Type: *

Category: *

Investment?:

Sale Method:


Authority:

Property Name:

Level No.: Unit No.: Street No.:

Street Name: * Street Type: *

Suburb: * State: *



How do I save my Property Search in Agentbox?

**Note: the saved search will save the search criteria not the actual results so new properties will appear each time you run the search.*

1. Open the [Advanced Property Search](#) panel
2. Enter your Search Criteria into the appropriate fields

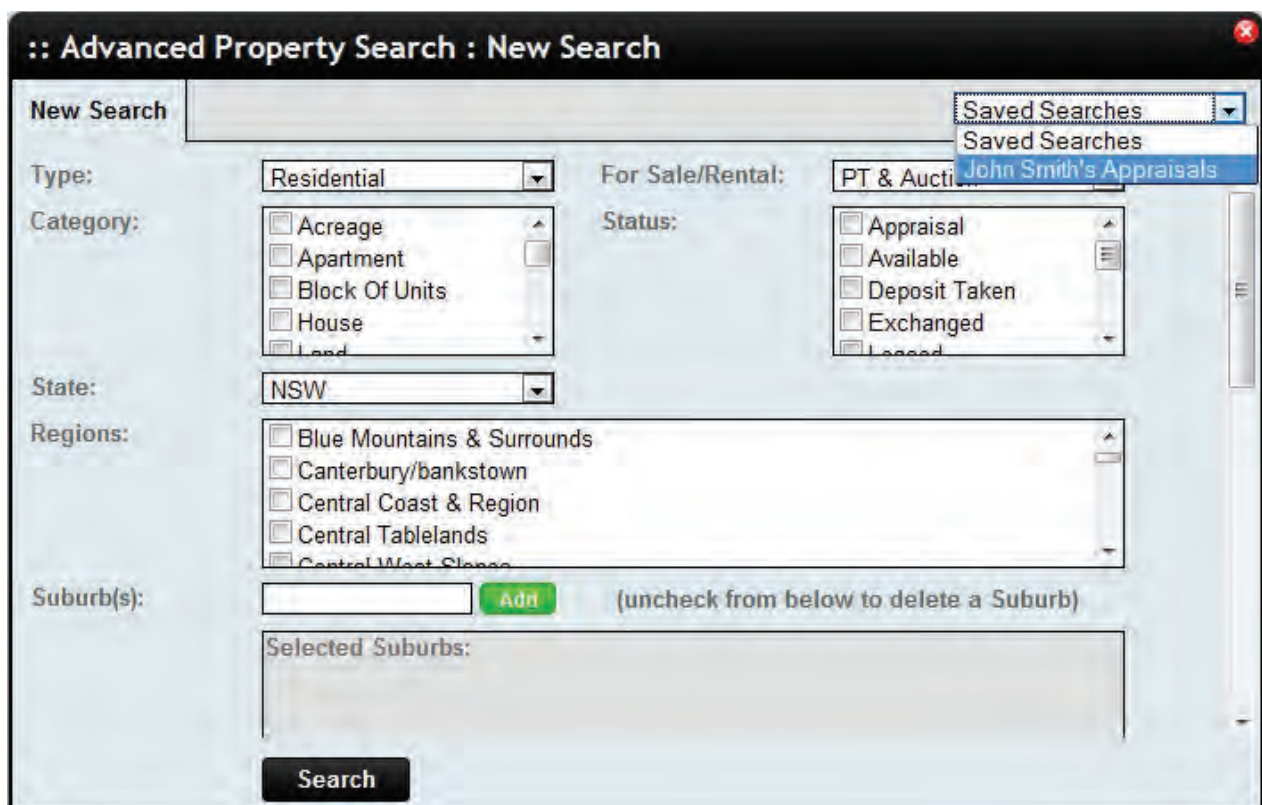
2. Click in the Save Search field and enter your Search name

2. Click on Search



How do I find my Saved Search in Agentbox?

1. Open the Advanced Property Search panel
2. Click on the Saved Searches drop down and select your search



3. Your Target List will appear on screen



How do I edit a saved property search?

1. Open one of your saved searches.



2. Click on the Refine Search tab



3. Alter search requirements as you wish

4. Click Search.

How do I remove a saved property search?

1. Open one of your saved searches.



2. Click on the Refine Search tab.

:: Advanced Property Search : John Smith's Appraisals

New Search | John Smith's Appraisals | Refine Search | Saved Searches

1 record(s) found from last search.

Remove Saved Search

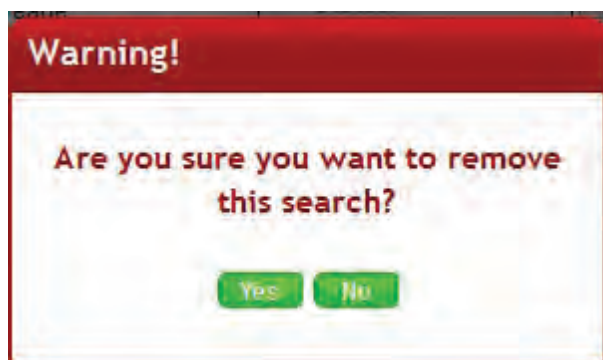
Type: Residential
 Category: Acreage Apartment Block Of Units House Land
 For Sale/Rental: PT & Auction
 Status: Appraisal Available Deposit Taken Exchanged Leased
 State: NSW
 Regions: Blue Mountains & Surrounds Canterbury/bankstown Central Coast & Region Central Tablelands Central West Slopes
 Suburb(s): **Add** (uncheck from below to delete a Suburb)

Search

3. Click on the red Remove Saved Search button




4. Click Yes



Print Detailed Property Report

How do I print a detailed property report?

1. Complete an [Advanced Property Search](#) to open your target list of properties
2. Click on the print icon at the top of the search results 

Properties

Available | Inspections | Off Market

Enter a keyword or fill in property options below. Your search will auto filter your property results.

Address:

For: Type:

Features:

From \$: To \$:

Order:

[Advanced Search](#)

- Add a Property
- Add a Project / Development
- Add an Appraisal / Prospect Property

Advanced Property Search : Search Results(24 properties found)

New Search | Search Results | Refine Search

Sort By:

	3 4 2	ID #1P0001	1 Jones Street, Copacabana Michael Johnson (Vendor) Max Hook (Vendor)	Contact Agent
	3 2 2	ID #1P0002	Unit 6/12 Del Rio Drive, Copacabana Michael Johnson (Vendor)	Offers over \$960,000
	4 2 2	ID #1P0008	654 Victoria Street, Sydney Samantha Jones (Vendor)	\$2,250,000
	2 1 2	ID #1P0022	Unit 6/13 Stuart Street, Manly Jan Farthing (Vendor)	Offers over \$600,000

- Your detailed listings report will open in a new tab or window and contains the Property ID, Address Suburb, Type, Features, Listing Details, Status, Advertised (Display) Price, Related Contacts, Agents, Last 3 Notes.

Printed by: Office Admin
Print Date: 17-Apr-2012

Detailed Listings Report

ID	Address	Suburb	Type	Features	Listing Details	Status	Advertised Price	Contact(s) associated	Agent(s) associated	Notes
#1P0001	1 Jones Street	Copacabana	For Sale: Residential (House)	Bed: 3 Bath: 4 Park: 2	Authority: Exclusive Method: Private Treaty Listed: 19-06-2011 Expiry: 17-11-2011	Available (16-01-2012)	Contact Agent	Buyer: Mary May [E] mm@hobmail.com [P] 02 9209 4174 [M] 0411 222 655 [V] 02 9523 5642 Vendor: Michael Johnson [E] mic@gmail.com [P] 02 9564 2533 [M] 0411 222 333 Tenant: Joseph Thomas [E] jo4@hotmail.com [V] 02 9487 7354 Vendor Solicitor: David Kim [E] dk@bigpond.net.au [P] 0481 234 667 [V] 02 9100 1234 Buyer Solicitor: Julia Burn [E] j2@gmail.com [P] 0400 000 123 [V] 02 9100 000 Vendor: Max Hook [E] mh@bigpond.net.au [P] 02 9100 1000 [M] 0412 222 333	Listing Agent: Jane Smith Selling Agent: Jane Smith	Last 3 notes: 20 Oct 2011 Vendor is going on holiday. Contact on return for a property update - Holidaying in Vanuatu with wife. Won holiday through a radio competition. Returning 30.10.11 (Added by: Melanie Thomas)
#1P0002	Unit 6/12 Del Rio Drive	Copacabana	For Sale: Residential (V/ha)	Bed: 3 Bath: 2 Park: 2	Authority: Exclusive Method: Auction Listed: 10-09-2011 Expiry: 15-12-2011	Available (22-11-2011)	Offers over \$960,000	Vendor: Michael Johnson [E] mic@gmail.com [P] 02 9564 2533 [M] 0411 222 333	Listing Agent: Jane Smith Listing Agent: Marcos Thompson	Access Details: Key no:17
#1P0029	3 Smith Street	Copacabana	For Sale: Residential (House)	Bed: 3 Bath: 2 Park: 2	Authority: Exclusive Method: Private Treaty Listed: 05-04-2012 Expiry: 04-07-2012	Available (03-04-2012)	Offers over \$1 million		Listing Agent: Jane Smith	

Preview Property

How can I preview my property?

- [Search for your Property](#) and open the [Property Card](#)

:: Listing : ID#1P0001 - 1 Jones Street, Copacabana

Full View

General For Sale Features Open Homes Agents & Contacts Resources Commission

Status: Available

For Sale/Rental: For Sale

Type: * Residential

Category: * House

Investment?:

Sale Method: Private Treaty

Authority: Exclusive


Property Name:

Level No.: Unit No.: Street No.: 1

Street Name: * Jones Street Type: * Street

Suburb: * COPACABANA (2251) State: * NSW

Save



Copy This Property

Vendor Preview Link

2. Click on the Property Preview Action Icon . This will open a new tab in your browser with a Preview of what your property will look like on your website.



1 Jones Street, Copacabana **3 beds | 4 baths | 2 cars**

[print this property](#) [email to a friend](#)




Luxury Balinese Inspired Residence

For Sale - Contact Agent

Don't miss out on this one! Relax in your open plan living area, opening onto an outdoor entertaining area overlooking the infinity pool and breathtaking ocean views.

Three large bedrooms, all contain en suites and built in wardrobes, the master features 270 degrees of ocean views. With automatic block out blinds for ultimate privacy.

Property Overview

Property ID: 1P0001

Property Type: House

Garage: 2

Outgoings: Water Rates: \$250 Quarterly
Council Rates: \$205 Quarterly
Land Tax: \$652 Quarterly

Features: Air Conditioning
Heating
Area Views
Alarm System
Pool

Agent Contact



John Smith

Vendor Preview Link

How do I create a Vendor Preview Link?

This page is used to check whether your details are correct before uploading the property to the web, you can send the vendor this link to preview the property.

1. [Search for your Property](#) and open the [Property Card](#)

:: Listing : ID#1P0001 - 1 Jones Street, Copacabana

Full View

General For Sale Features Open Homes Agents & Contacts Resources Commission

Status: Available

For Sale/Rental: For Sale

Type: * Residential

Category: * House

Investment?:

Sale Method: Private Treaty

Authority: Exclusive

Property Name:

Level No.: Unit No.: Street No.: 1

Street Name: * Jones Street Type: * Street

Suburb: * COPACABANA (2251) State: * NSW

Save

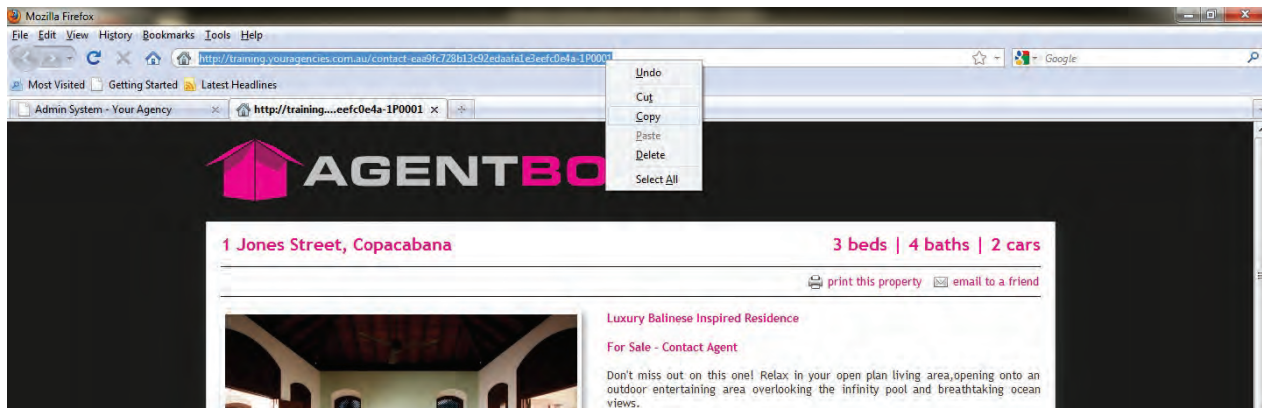
Copy This Property

Vendor Preview Link

2. Click on the green Vendor Preview Link button on the General tab below the main photo.

**Note: The Vendor Preview Link button will only appear once a Vendor has been assigned to the property via the Agents & Contacts tab.*

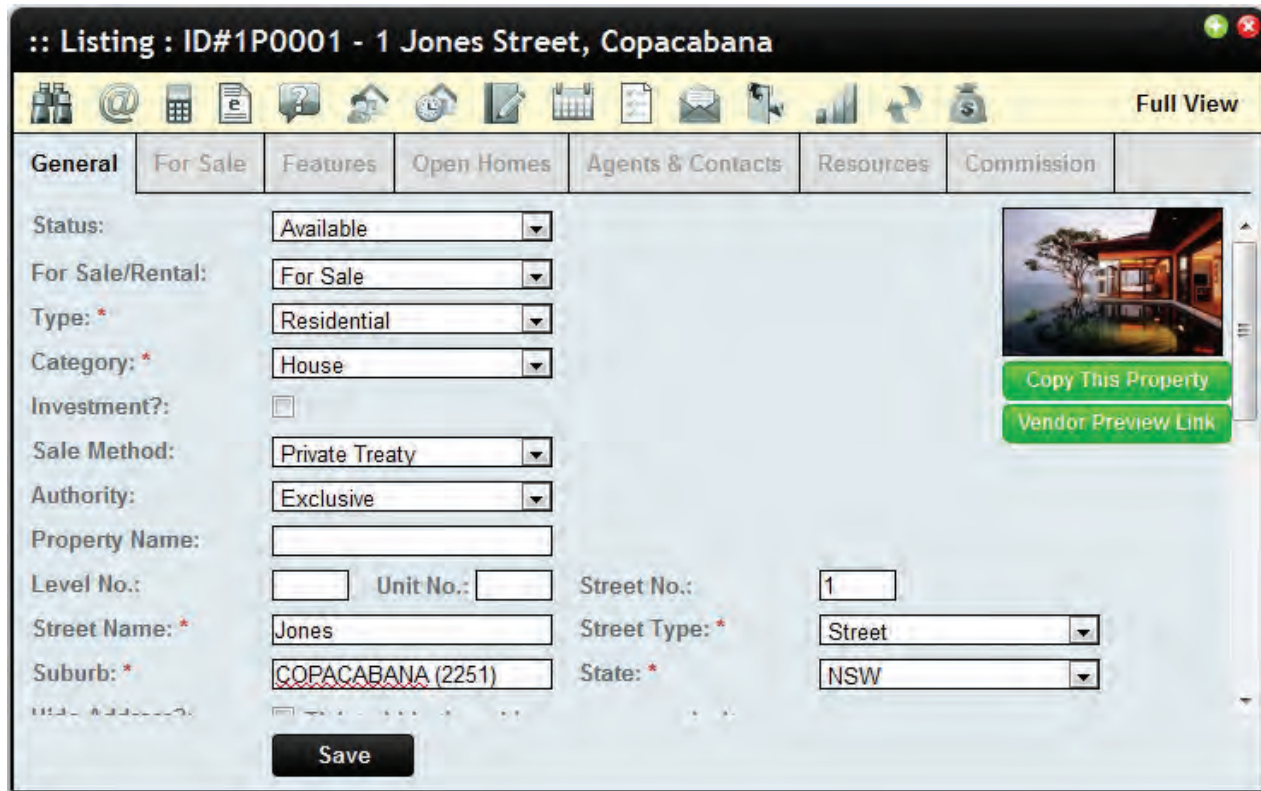
3. The property page will open in a new browser tab.
4. Copy and Paste the URL into an email and send to the vendor.



Email Property Contacts

How do I send an email to all Contacts attached to my Property?
For example: Vendor, Solicitors, Agents etc.

1. [Search for your Property](#) and open the [Property Card](#)



The screenshot shows a web application interface for a property listing. The title bar reads ':: Listing : ID#1P0001 - 1 Jones Street, Copacabana'. Below the title bar is a toolbar with various icons including a magnifying glass, an '@' symbol, a calculator, a document, a question mark, a house, a calendar, a folder, an envelope, a hand, a bar chart, and a money bag. The main content area has a tabbed interface with 'General' selected. The 'General' tab contains the following fields:

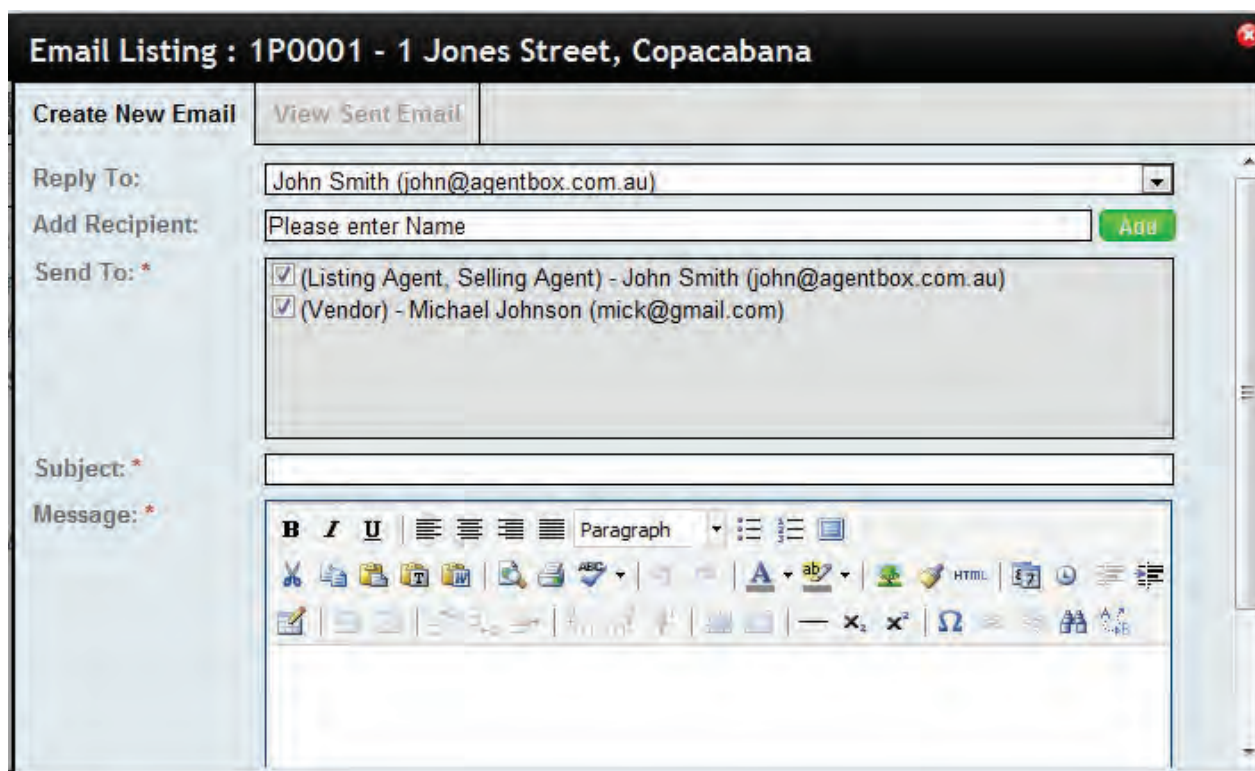
Status:	Available				
For Sale/Rental:	For Sale				
Type: *	Residential				
Category: *	House				
Investment?:	<input type="checkbox"/>				
Sale Method:	Private Treaty				
Authority:	Exclusive				
Property Name:					
Level No.:		Unit No.:		Street No.:	1
Street Name: *	Jones	Street Type: *	Street		
Suburb: *	COPACABANA (2251)	State: *	NSW		

At the bottom of the form is a 'Save' button. To the right of the form, there is a small image of a house and two green buttons: 'Copy This Property' and 'Vendor Preview Link'.

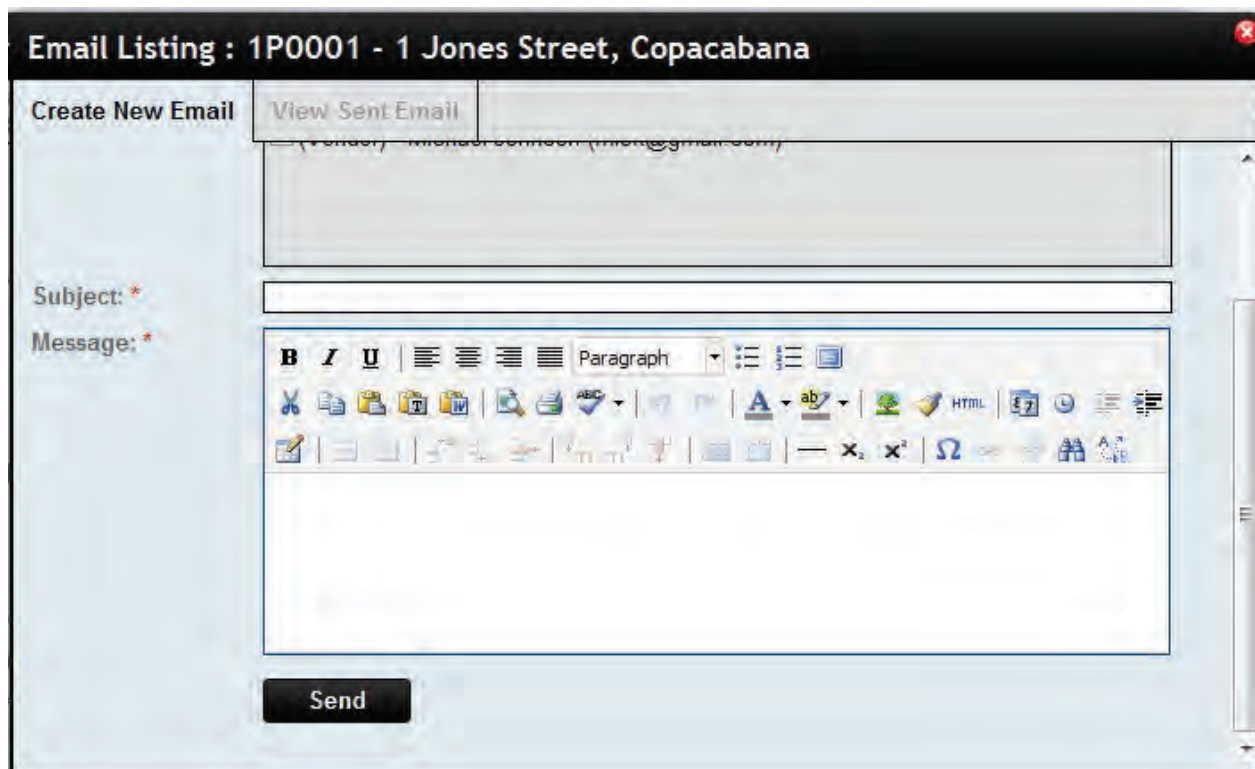
2. Click on the Email Action Icon 

The automatically generated list of recipients include all contacts and agents attached to the property (via the Agents & Contacts tab) which have an email address entered in their Contact card.

**Note: you may also add additional recipients via the Add Recipient field. Enter a minimum of 3 characters to populate a quick find dropdown. Click on the Contact's name and click on the green Add button to add the Contact to the recipient list.*



3. Click Send



SMS Property Contacts

How do I send an SMS to all Contacts attached to my Property?
For example: Vendor, Solicitors, Agents etc.

1. [Search for your Property](#) and open the [Property Card](#)

The screenshot shows a web application interface for a property listing. The title bar reads ':: Listing : ID#1P0001 - 1 Jones Street, Copacabana'. Below the title bar is a navigation menu with tabs: 'General', 'For Sale', 'Features', 'Open Homes', 'Agents & Contacts', 'Resources', and 'Commission'. The 'General' tab is active. The form contains the following fields and options:

- Status: Available (dropdown)
- For Sale/Rental: For Sale (dropdown)
- Type: * Residential (dropdown)
- Category: * House (dropdown)
- Investment?:
- Sale Method: Private Treaty (dropdown)
- Authority: Exclusive (dropdown)
- Property Name: (text input)
- Level No.: (text input) Unit No.: (text input) Street No.: 1 (text input)
- Street Name: * Jones (text input) Street Type: * Street (dropdown)
- Suburb: * COPACABANA (2251) (text input) State: * NSW (dropdown)

On the right side of the form, there is a small image of a house and two green buttons: 'Copy This Property' and 'Vendor Preview Link'. At the bottom of the form is a black 'Save' button.

2. Click on the SMS Action icon 

The automatically generated list of recipients include all contacts and agents attached to the property (via the Agents & Contacts tab) which have mobile number entered in their Contact card.

**Note: you may also add additional recipients via the Add Recipient field. Enter a minimum of 3 characters to populate a quick find dropdown. Click on the Contact's name and click on the green Add button to add the Contact to the recipient list.*

SMS Listing : 1P0001 - 1 Jones Street, Copacabana

Create New SMS | View Sent SMS

Reply To: John Smith (0408676707)

Add Recipient: Please enter Name

Send To: *

- (Listing Agent, Selling Agent) - John Smith (0408676707)
- (Vendor) - Michael Johnson (0411 222 333)

SMS Message: *

Characters typed in so far: (160 characters per sms)

Your credits (standard SMS messages) remaining: **95**

3. Click Send

SMS Listing : 1P0001 - 1 Jones Street, Copacabana

Create New SMS | View Sent SMS

SMS Message: *

Characters typed in so far: (160 characters per sms)

Your credits (standard SMS messages) remaining: **95**

A standard SMS message is 160 characters. Messages greater than 160 characters will be sent as an additional SMS message.

Special symbols used (eg \$!#@& etc) will represent 3 normal characters in a standard SMS message. This does not apply to hyphens(-), underscores(_) or periods(.

E-Newsletter

How do I send an E-Newsletter through a Property?

Sending an E-Newsletter through a property will automatically place the selected property as a Feature Property within the E-Newsletter.

**Note: This only applies for the General Template.*

1. [Search for your Property](#) and open the [Property Card](#)

4. Refine the recipients list
5. Enter the E-Newsletter Subject.

The screenshot shows a web application window titled "Send E-Newsletter". At the top, there is a yellow banner with the text "Step 2 of 3 - Edit your delivery details" and two green buttons: "View Saved E-Newsletters" and "View Sent E-Newsletters". Below the banner is a navigation bar with three tabs: "Select Template", "Delivery Details" (which is active), and "Edit & Send E-Newsletter".

The main content area is divided into two columns. The left column is titled "Delivery To:" and contains three green buttons: "Refine", "Tick All", and "Unick All". The right column is titled "7 record(s) found:" and contains a list of seven recipients, each with a checked checkbox and their name and email address:

- Jack Black (jack@hotmail.com)
- Gary Brown (gary.brown@hotmail.com)
- Michael Jones (mick@gmail.com)
- Sam Jones (sam@hotmail.com)
- Samantha Jones (samantha@hotmail.com)
- Mary May (mm@hotmail.com)
- Charles Roberts (charles@gmail.com)

Below the list, there is a "Reply From:" field with a dropdown menu showing "John Smith (john@agentbox.com.au)". Below that is a "Subject: *" field with the text "Check out our spectacular new property!".

At the bottom of the form, there are two black buttons: "« Previous Step" on the left and "Save & Proceed »" on the right.

6. [Create E-Newsletter](#)

Send E-Newsletter

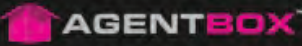
Step 3 of 3 - Edit then send your e-newsletter [View Saved E-Newsletters](#) [View Sent E-Newsletters](#)

Select Template | Delivery Details | **Edit & Send E-Newsletter**

To construct your E-Newsletter, select and add your desired section(s) from the drop down box. Once it appears, simply click within the red dotted lines to edit that section.

Add Section: [Add](#)

Not interested anymore? [Unsubscribe](#)



Newsletter Update

⋮ In this Issue ⋮ -

Thursday, 17th November 2011

02 9209 4174 - office@agentbox.com.au

Hello *Contact's first name*,

Kind regards
John Smith

« Previous Step Send for Testing Save Preview Send Now

Send E-Newsletter


Step 3 of 3 - Edit then send your e-newsletter [View Saved E-Newsletters](#) [View Sent E-Newsletters](#)

Select Template | Delivery Details | **Edit & Send E-Newsletter**

To construct your E-Newsletter, select and add your desired section(s) from the drop down box. Once it appears, simply click within the red dotted lines to edit that section.




Add Section: [Add](#)

Feature Property



1 Jones Street, Copacabana

Luxury Balinese Inspired Residence

3  4  2 

[view property](#)

^ Back to Top

« Previous Step Send for Testing Save Preview Send Now

7. [Add additional content](#) such as an Auction Timetable, Current Listings, Feature Property, News Item, OFI or Sold Properties via the Add Section dropdown.

8. Once you are satisfied with your E-Newsletter after a final Preview, you may send a test copy to yourself via the Send for Testing button or send to the recipients using the Send Now button.

**Note: Send for Testing button will send a copy to the email address you have used to log in.*

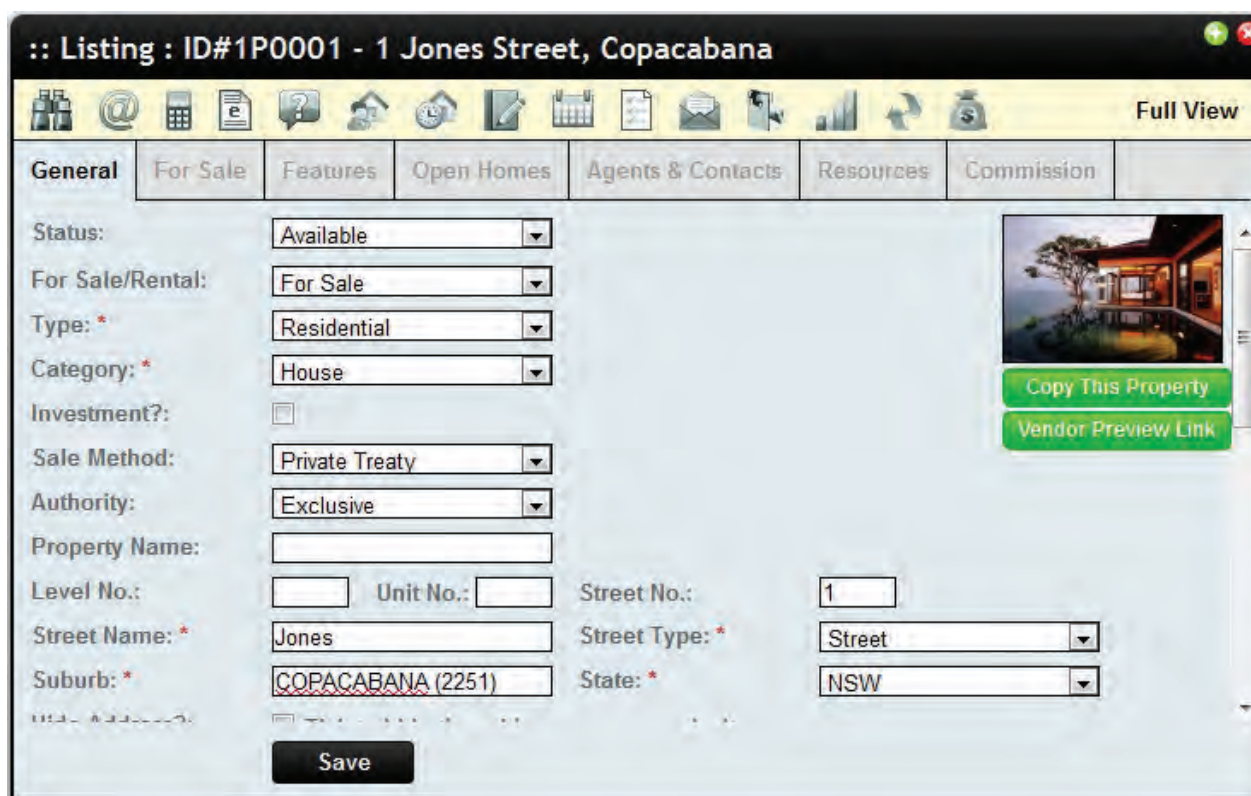
Log a Property Enquiry

How do I log an enquiry from a property?

The Log an Enquiry tool does the following:

- * Logs an enquiry against the Property's Recent Enquiries history and in the contact's communication history.
- * Creates a task and sends an email to the assigned staff member to action
- * Comments appear on the Vendor Report

1. [Search for your Property](#) and open the [Property Card](#) or access the log an enquiry action icon from the property search results panel



The screenshot shows a web application interface for a property listing. The title bar reads "Listing : ID#1P0001 - 1 Jones Street, Copacabana". Below the title bar is a navigation bar with icons for various actions and a "Full View" button. The main content area is divided into several tabs: "General", "For Sale", "Features", "Open Homes", "Agents & Contacts", "Resources", and "Commission". The "General" tab is active, displaying a form with the following fields and values:

Status:	Available				
For Sale/Rental:	For Sale				
Type: *	Residential				
Category: *	House				
Investment?:	<input type="checkbox"/>				
Sale Method:	Private Treaty				
Authority:	Exclusive				
Property Name:					
Level No.:		Unit No.:		Street No.:	1
Street Name: *	Jones	Street Type: *	Street		
Suburb: *	COPACABANA (2251)	State: *	NSW		

At the bottom of the form is a "Save" button. To the right of the form, there is a small image of the property and two green buttons: "Copy This Property" and "Vendor Preview Link".

Properties

Available | Inspections | Off Market

Enter a keyword or fill in property options below. Your search will auto filter your property results. **(1 found)**

Address:

For: Type:

Features:

From \$: To \$:

Order:

[Advanced Search](#)

- Add a Property
- Add a Project / Development
- Add an Appraisal / Prospect Property

Property Results

ID #1P0001

1 Jones Street
Copacabana
Contact Agent
AVAILABLE

2. Click on the Log an Enquiry action icon

:: Log Enquiry : 1P0001 - 1 Jones Street, Copacabana

Enquiry Type:

Enquiry Source:

Select Contact:

Enquiry Date:

Description: *

Assign to Staff: *

- Office Admin
- Joe Franks
- John Smith
- Jane Thomas
- Melanie Thompson

SMS Reminder: Tick here if you want to send an SMS reminder

3. Enter

*Enquiry Type: General, Buyer, Vendor, Tenant, Complaint, Other

* Enquiry Source: Auto Email, Email Enquiry, Import, Open Homes Inspection, Phone Enquiry, Website Enquiry, Other

* Select Contact: Search for the contact or create new inside the log an enquiry form.

If creating a new contact enter the First Name, Last Name and at least one of the following: Mobile No., Home No. and/or Email

* Enquiry Date: By default will be today's date

* Description: * - Will appear in the email, task and vendor report

* Assign to Staff: * - Select the responsible staff member.

* SMS Reminder: Tick here if you want to send an SMS reminder to the assigned staff members (SMS Credits required)

:: Log Enquiry : 1P0001 - 1 Jones Street, Copacabana

Enquiry Type:

Enquiry Source:

Select Contact:

Enquiry Date:

Description: *

Assign to Staff: *
 Office Admin
 Joe Franks
 John Smith
 Jane Thomas
 Melanie Thompson

SMS Reminder: Tick here if you want to send an SMS reminder

4. Click Submit, Save and Add Another or Save and View Contact to open the corresponding contact card

See also..

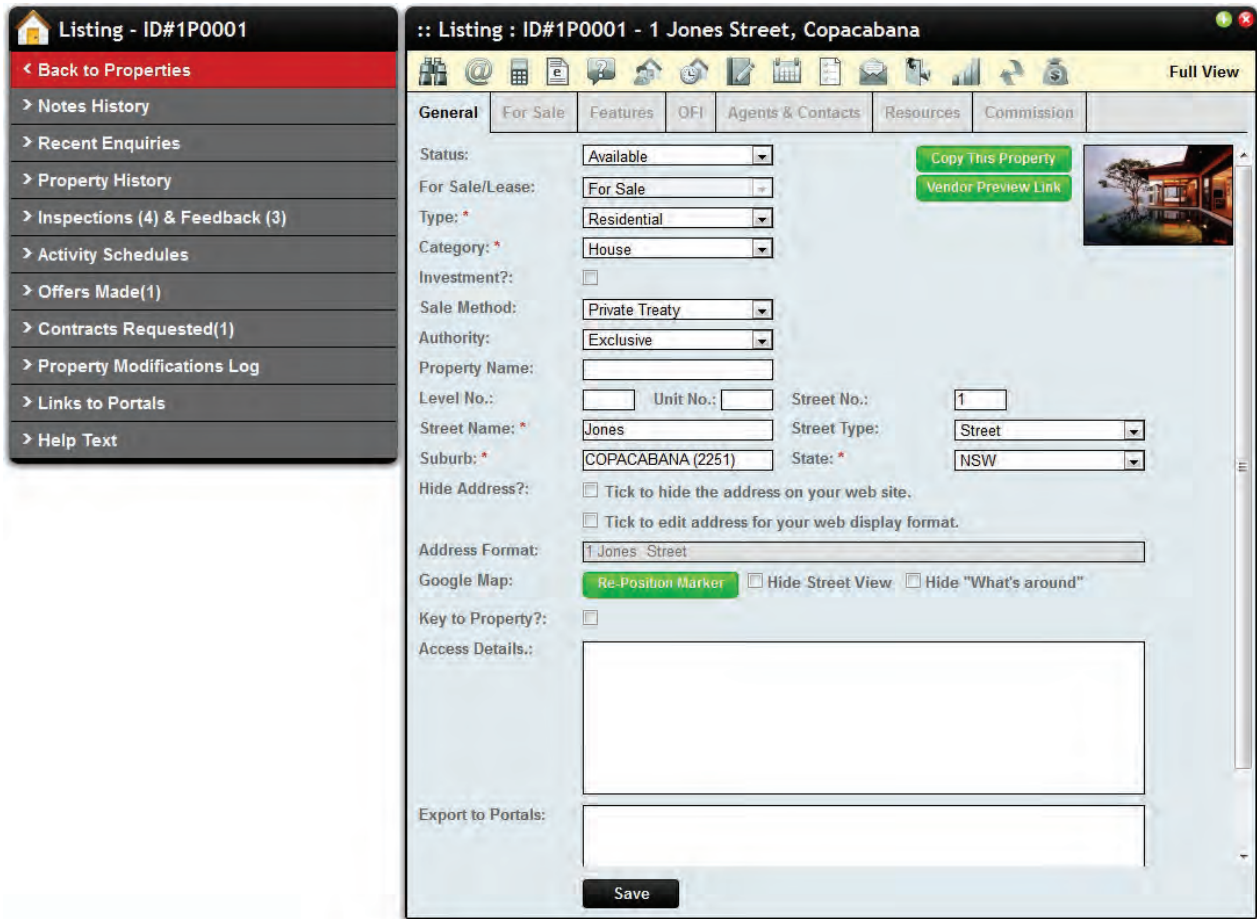
[How do I view recent property enquiries?](#)

[How do I communicate to a list of property enquirers?](#)

View Recent Property Enquiries

How do I view all recent property enquiries?

1. [Search for your Property](#) and open the [Property Card](#)



2. On the left panel click Recent Enquiries (If the matching left panel is not visible, click Full View in the top right hand corner of the property card).

3. Here you can view a list of all Recent Enquiries for the property that were logged using the Log an Enquiry Action Icon.

4. Click More Detail next to open the corresponding enquiry

See also...

[How do I communicate to a list of recent enquirers](#)

Contact Recent Enquirers

How do I communicate to a list of property enquirers?

1. [Search for your Property](#) and open the [Property Card](#)

Listing - ID#1P0001

< Back to Properties

- > Notes History
- > Recent Enquiries
- > Property History
- > Inspections (4) & Feedback (3)
- > Activity Schedules
- > Offers Made(1)
- > Contracts Requested(1)
- > Property Modifications Log
- > Links to Portals
- > Help Text

:: Listing : ID#1P0001 - 1 Jones Street, Copacabana

Full View

General | For Sale | Features | OFI | Agents & Contacts | Resources | Commission

Status: Available Copy This Property

For Sale/Lease: For Sale Vendor Preview Link

Type: * Residential

Category: * House

Investment?:

Sale Method: Private Treaty

Authority: Exclusive

Property Name:

Level No.: Unit No.: Street No.:

Street Name: * Jones Street Type: Street

Suburb: * COPACABANA (2251) State: * NSW

Hide Address?: Tick to hide the address on your web site.
 Tick to edit address for your web display format.

Address Format:

Google Map: Re-Position Marker Hide Street View Hide "What's around"

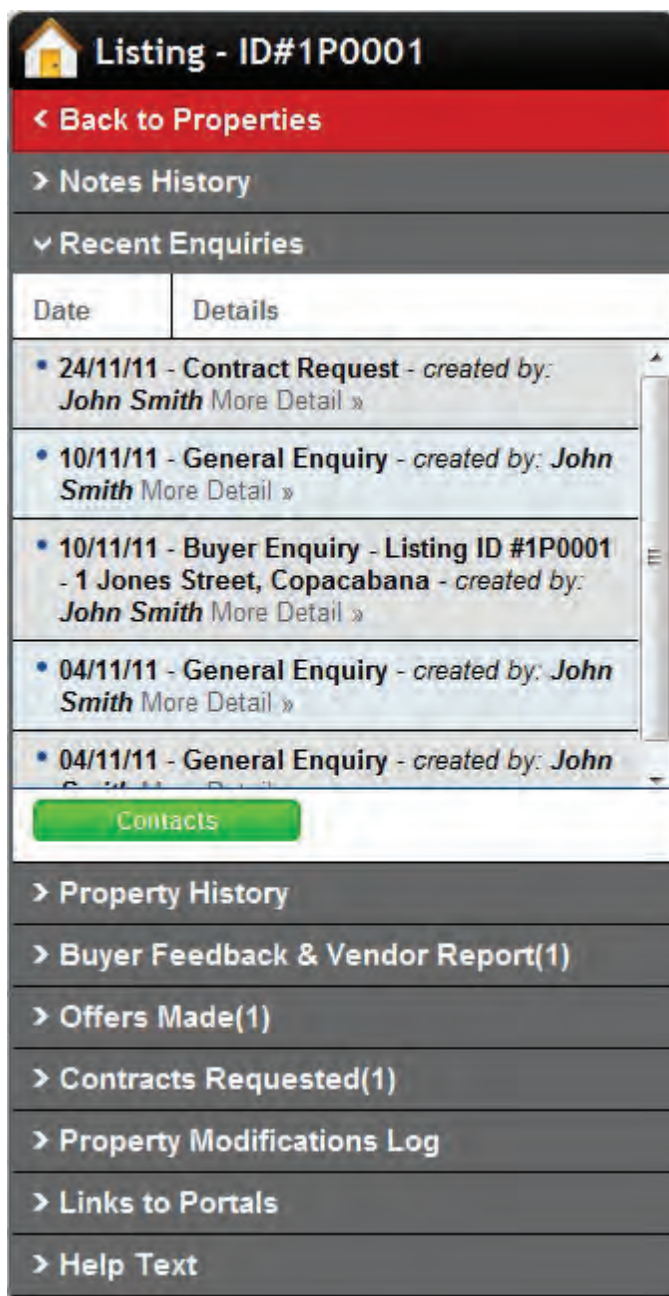
Key to Property?:

Access Details.:


Export to Portals:

Save

2. Click on Recent Enquiries on the left property panel



3. Click on the green Contacts button

4. The list of contact will open. Use the action icons  to communicate to these contacts via a Mail Merge, SMS, E-Newsletter or Print your target list.

:: Advanced Contact Search : Search Results(5 contacts found)

Sort By: [v]

Contact	Assigned Staff	Last Contacted	Contact Info
Michael Johnson	John Smith		@ [i] [c]
Samantha Jones	John Smith	10/11/11	@ [i] [c]
Mary May	John Smith	19/08/11	@ [i] [c]
Hayley Rees	John Smith	10/11/11	[i] [c]
Jane Smith	John Smith		[i] [c]

See also..

[How do I log an enquiry for a property?](#)

[How do I view recent property enquirers?](#)

[How do I log an enquiry from a contact card?](#)

[How do I view recent enquiries for a contact?](#)

Match Contacts

How do I match Contacts to a Property in Agentbox?

There are two ways you can match Contacts to a Property in Agentbox:

- Through a property card
- Through the Fast Finds Results Panel

Property Card

1. [Search for your Property](#) and open the [Property Card](#)

:: Listing : ID#1P0001 - 1 Jones Street, Copacabana

Full View

General For Sale Features Open Homes Agents & Contacts Resources Commission

Status: Available

For Sale/Rental: For Sale

Type: * Residential

Category: * House

Investment?:

Sale Method: Private Treaty

Authority: Exclusive

Property Name:

Level No.: Unit No.: Street No.: 1

Street Name: * Jones Street Type: * Street


Suburb: * COPACABANA (2251) State: * NSW

Save



Copy This Property

Vendor Preview Link

2. Click on the Match Contacts to this Property Action Icon 

4. A list of Contacts who's requirements match the property will open in a new panel

:: Advanced Contact Search : Search Results(6 contacts found)

Sort By: Contact Name: A-Z

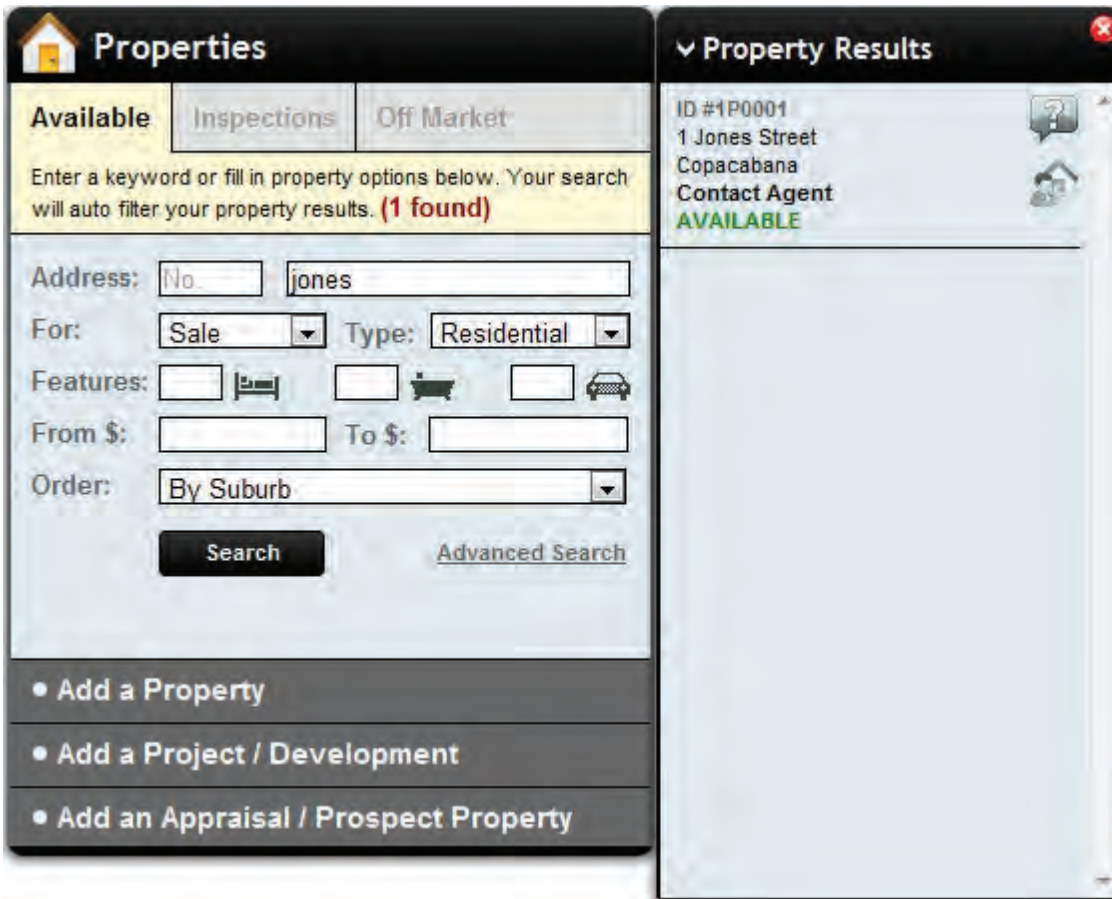
Contact	Assigned Staff	Last Contacted	Contact Info
Colin Fairlight	Melanie Thompson		@
Michael Johnson	John Smith		@
Samantha Jones	John Smith	10/11/11	@
Mary May	John Smith	19/08/11	@
Charles Roberts	John Smith		@
Jane Smith	John Smith		

Fast Finds Results Panel

1. Click on Properties from the main menu



2. Search for your Property on the Fast Find Left Panel




3. Click on the Match Contacts to this Property Action Icon from the Fast Find Results Panel 

4. A list of Contacts who's requirements match the property will open in a new panel

:: Advanced Contact Search : Search Results(6 contacts found)

Sort By: [v]



Contact	Assigned Staff	Last Contacted	Contact Info
Colin Fairlight	Melanie Thompson		@ [v]
Michael Johnson	John Smith		@ [v]
Samantha Jones	John Smith	10/11/11	@ [v]
Mary May	John Smith	19/08/11	@ [v]
Charles Roberts	John Smith		@ [v]
Jane Smith	John Smith		[v]

How do I send an email, SMS or E Newsletter informing matched Buyers of this Property in Agentbox?

1. Click on the Send an Email, Send SMS or Send an E Newsletter action icon on the Matched Buyer search results panel and follow the steps to send an Email, SMS and E Newsletter above



Appointment Inspection

How do I enter feedback after an Appointment Inspection?

1. [Search for your Property](#) and open the [Property Card](#)

:: Listing : ID#1P0001 - 1 Jones Street, Copacabana

Full View

General For Sale Features Open Homes Agents & Contacts Resources Commission

Status: Available

For Sale/Rental: For Sale

Type: * Residential

Category: * House

Investment?:

Sale Method: Private Treaty

Authority: Exclusive

Property Name:

Level No.: Unit No.: Street No.: 1

Street Name: * Jones Street Type: * Street

Suburb: * COPACABANA (2251) State: * NSW

Save

Copy This Property

Vendor Preview Link



2. Click on the Add Feedback by Appointment action icon 

3. Enter the date and time of the inspection

Inspection By Appointment

Inspection Date: * 07 11 2011 

From: 10 00 AM

To: 10 30 AM

Save Cancel

4. The right panel will open

- o Type the related contact name and select from the drop down results or click add new contact.
- o If adding a new contact, add the first name, last name and at least one contact method.
- o Enter the comments
- o Select Save & Add Another or Save & View Contact to add further buyer requirements.

Inspection Feedback

Add Feedback

(1) Other Feedback

1 Jones Street, Copacabana

07/11/2011 10:00am - 10:30am

Contact:

Price Feedback \$:

Contract Taken

Comments:

Mary wanted a second look at the house with her husband after the open house on the 5th. They really love the property however need to check finances..

Save & Add Another

Save & View Contact

Inspection Feedback ✕

Add Feedback
(1) Other Feedback

1 Jones Street, Copacabana
 07/11/2011 10:00am - 10:30am

First Name:
 Last Name:
 Email:
 Mobile No.:
 Home No.:
 Work No.:
 Suburb:

Subscribe?

Price Feedback \$:
 Contract Taken

Comments:

Save & Add Another

Save & View Contact

5. Once you have logged all appointments required, close the right panel using the red cross.

Add a Note

How do I add a note against a property?

1. [Search for your Property](#) and open the [Property Card](#)

:: Listing : ID#1P0001 - 1 Jones Street, Copacabana

Full View

General For Sale Features Open Homes Agents & Contacts Resources Commission

Status: Available

For Sale/Rental: For Sale

Type: * Residential

Category: * House

Investment?:

Sale Method: Private Treaty

Authority: Exclusive

Property Name:

Level No.: Unit No.: Street No.: 1


Street Name: * Jones Street Type: * Street


Suburb: * COPACABANA (2251) State: * NSW

Save

Copy This Property

Vendor Preview Link



2. Click on Add a Note action icon 
3. Enter the note Headline & Description
4. Assign a Contact if applicable

:: Listing : #1P0001 - Copacabana : Add a Note

Note Date: * 20 10 2011 04 45 PM

Headline: * Vendor is going on holiday. Contact on return for a property update.

Description:

 Holidaying in Vanuatu with wife. Won holiday through a radio competition.

 Returning 30.10.11

Assign Contact:

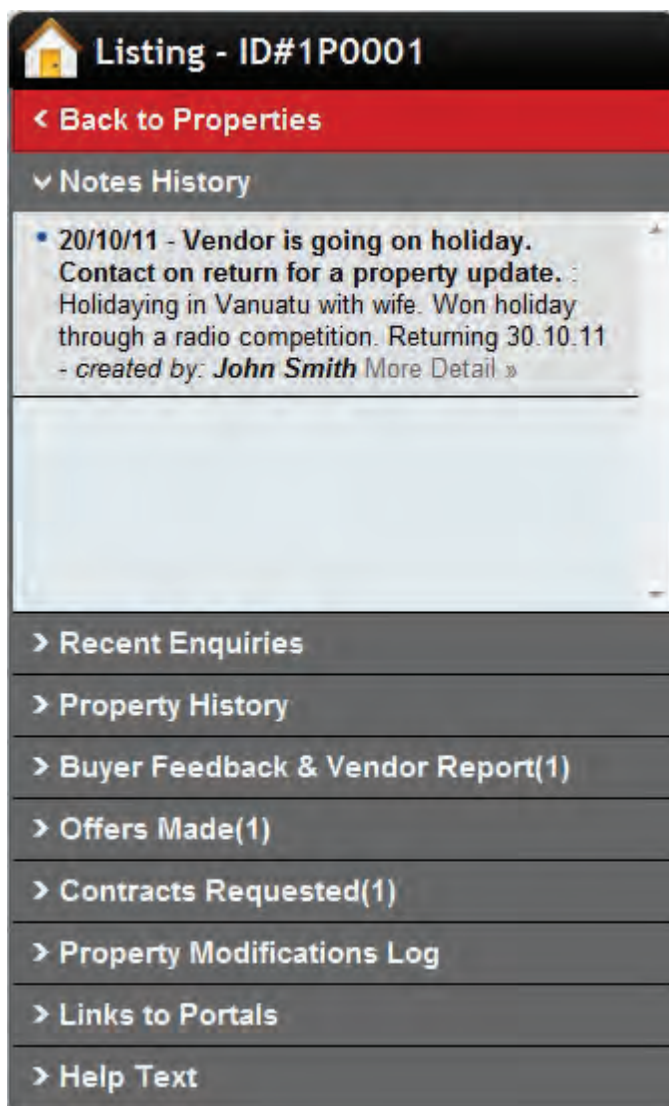
Selected Contact(s): Michael Johnson

Publish Note: Publishing this note will allow all relevant staff to view this note.

Add as a Task:

5. If applicable tick Publish Note if you would like all users to view the note
6. If applicable tick Add a Task to enter a follow up date. This will then create a task for you and appear in your task list on the allocated due date.
7. Click on Save

Your Notes will then appear in the left Contacts panel for quick reference when accessing your Contact.



See also...

[Notes History](#)

Add a Meeting

How do I Add a Meeting from a Property in Agentbox?

1. [Search for your Property](#) and open the [Property Card](#)

:: Listing : ID#1P0001 - 1 Jones Street, Copacabana

Full View

General For Sale Features Open Homes Agents & Contacts Resources Commission

Status: Available

For Sale/Rental: For Sale

Type: * Residential

Category: * House

Investment?:

Sale Method: Private Treaty

Authority: Exclusive

Property Name:

Level No.: Unit No.: Street No.: 1

Street Name: * Jones Street Type: * Street

Suburb: * COPACABANA (2251) State: * NSW

Save

Copy This Property

Vendor Preview Link



2. Click on Add a Meeting action icon 

:: Listing : 1P0001 - Copacabana : Add a Meeting

Create New Meeting View Future Meetings View Past Meetings

Meeting Starts: * 30 11 2011 05 : 00 PM

Meeting End: 30 11 2011 06 : 00 PM

Headline: *

Description: *

Responsible Staff: * Office Admin Joe Franks John Smith Jane Thomas Melanie Thompson

SMS Reminder: Tick here if you want to send SMS reminder to staff member(s).

Assign Contact:

Add

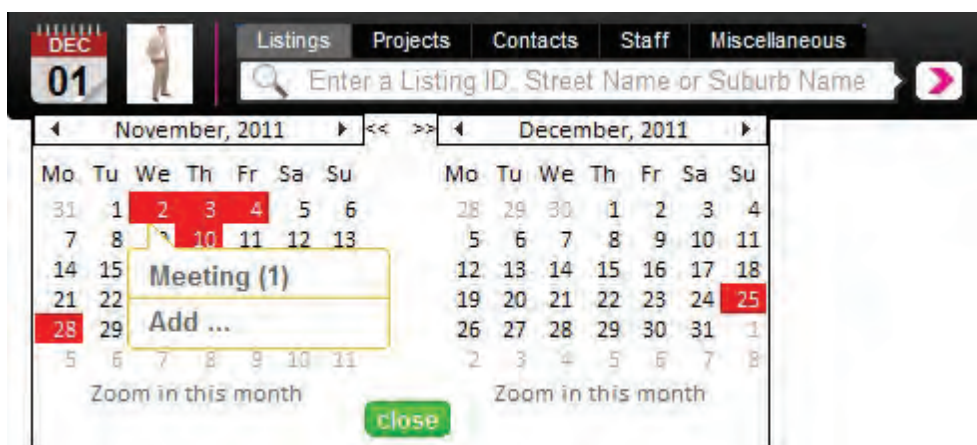
3. Enter Meeting time, Heading, Description, Staff and assign Contact (if applicable).

:: Listing : 1P0001 - Copacabana : Add a Meeting

Meeting Starts: * 02 / 11 / 2011 09 : 00 AM
 Meeting End: 02 / 11 / 2011 10 : 00 AM
 Headline: * Jones St Vendor Update
 Description: * Vendor has returned from holiday. Meeting has been set up to inform vendor of all property updates.
 Responsible Staff: * Office Admin Joe Franks John Smith Jane Thomas Melanie Thompson
 SMS Reminder: Tick here if you want to send SMS reminder to staff member(s).
 Assign Contact:

4. Click on Save

The meeting will be added to your Agentbox calendar and a notification email will be sent to the assigned staff.

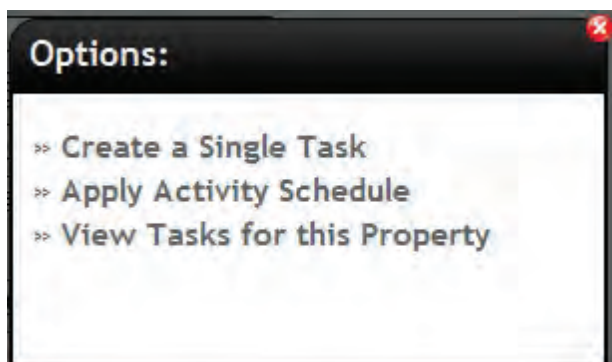


Tasks & Activity Schedules

How do I add a task, apply an activity schedule or view my property tasks?

1. [Search for your Property](#) and open the [Property Card](#)

2. Click on the 'Tasks' icon 



3. Select [Create a Single Task](#)
[Apply Activity Schedule](#)
 View Tasks for this Property

If you select view tasks for this property the property task view will appear, here you can add a task, delete a task, view current property tasks or view completed property tasks

:: Listing : 1P0001 - Copacabana : View Tasks						
Create New Task	View Current Tasks	View Completed Tasks				
Task	Responsible Staff	Due	Done?	Contact(s)		
General Enquiry	John Smith	04/11/11	no	Michael Johnson	Delete	
Buyer Enquiry - Listing ID #1P0001 - 1 Jones Street, Copacabana	John Smith, Melanie Thompson	18/11/11	no	Samantha Jones	Delete	
Send letter	John Smith	18/11/11	no	Samantha Jones	Delete	
Make a phone call	John Smith, Melanie Thompson	20/11/11	no	Samantha Jones	Delete	

You may also be interested in: / You may also want to know:

[How to edit a task](#)

[How to attach a file to a task](#)

[How to complete a task](#)

Send a Letter to Property Contacts

How do I send a Letter via a property?

1. [Search for your Property](#) and open the [Property Card](#)

:: Listing : ID#1P0001 - 1 Jones Street, Copacabana

Full View

General For Sale Features Open Homes Agents & Contacts Resources Commission

Status: Available

For Sale/Rental: For Sale

Type: * Residential

Category: * House

Investment?:

Sale Method: Private Treaty

Authority: Exclusive

Property Name:

Level No.: Unit No.: Street No.: 1

Street Name: * Jones Street Type: * Street


Suburb: * COPACABANA (2251) State: * NSW

Save

Copy This Property

Vendor Preview Link



2. Ensure the contacts used in the template e.g. Vendor, Vendor Solicitor, Buyer and Buyer Solicitor have been added to the property via the Agents & Contacts tab
3. Ensure all the property information e.g. price or date fields that are included in the [letter variables](#) (or merge fields) are added to the property.
4. Click the Letter Generator action icon 

Property Letter :: Listing : #1P0001 - Copacabana


Step 1 of 3 - Select Template View created letters

Select a Template:

:: Template Preview ::

Send From:

Purchaser Sales Advice

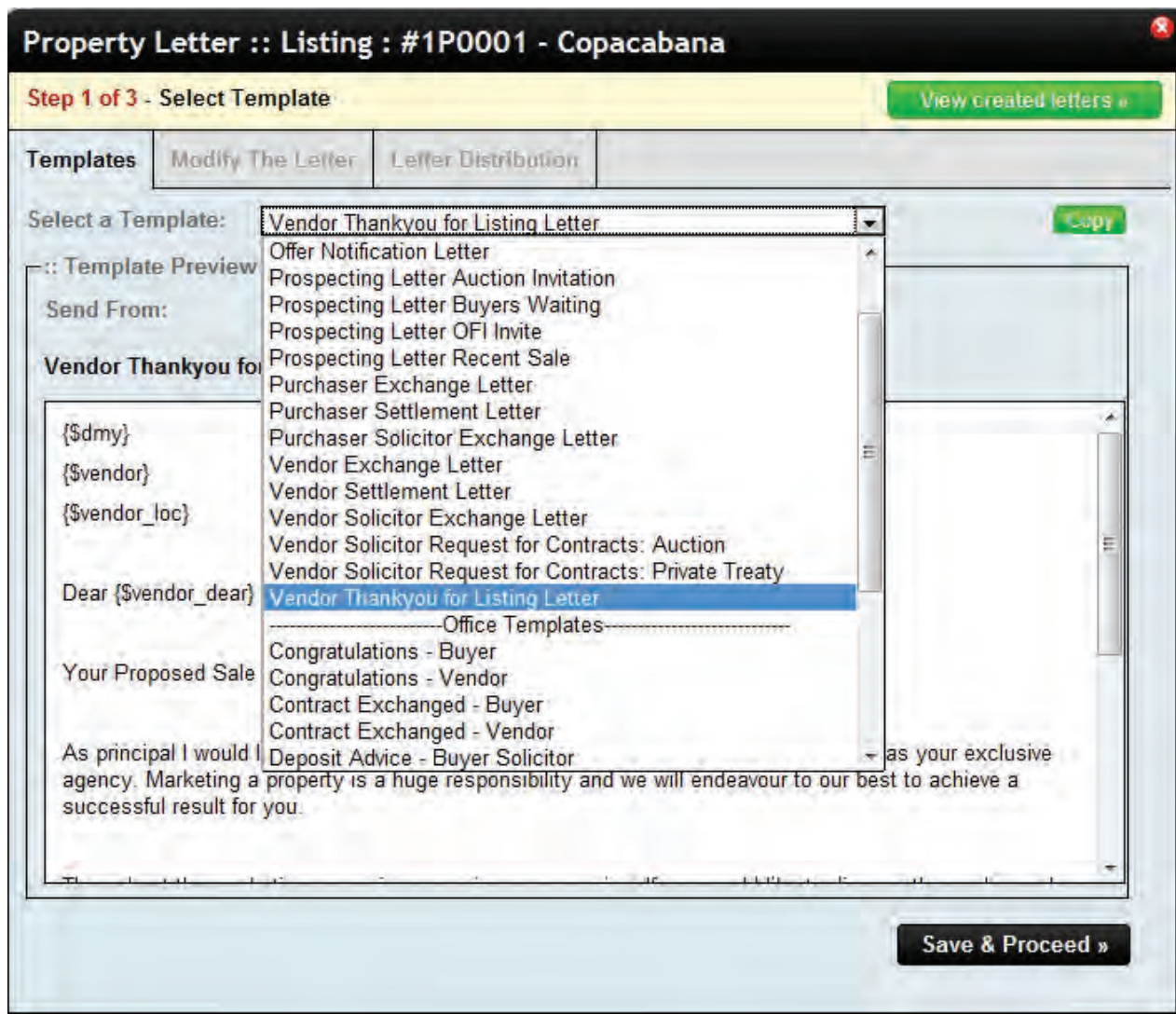


Your Agency
 4 Cornwallis Street, Eveleigh, NSW 2015
 Phone: 02 9209 4174
 Fax: 02 9310 7232
 Email: office@agentbox.com.au
 ABN: 11 222 112 142

Property Details


Property Address:	{ \$prop_loc }	
Contract Price:	{ \$sold_price }	Deposit Held:

5. Select the Template from the Select a Template drop down.



5. Click Save & Proceed.

6. You can now modify the contents of the letter. The contact and property details e.g. names, address, dates and prices should be pulled from the contact cards and the property data. However, you can manually complete any missing information or adjust the contents of the letter at this point without affecting the template. All missing Variable data is highlighted as follows: #BUYER#

**Note: you can also edit in full screen mode by selecting the Full Screen Icon  once you have finished editing the letter in this mode, click this icon again to return to normal view.*

Property Letter :: Listing : #1P0001 - Copacabana

Step 3 of 3 - Letter Distribution [View created letters](#)

Templates | **Modify The Letter** | **Letter Distribution**

Distribution Method: Print as PDF

:: Print this Letter ::

Print This will convert the Letter to a PDF for your printing needs and will save a copy to the property record for later reference.

WinWord This will convert the Letter to a WinWord Document for your printing needs.

« Previous Step **Save & Proceed »**

9. To email the letter select either Embed as HTML or send as a PDF attachment via email from the Distribution Method drop down menu.

Templates Modify The Letter **Letter Distribution**

Distribution Method: Send as HTML email

:: Option to Email this Letter ::

Email Subject: *

Email Message : Letter will be directly put into the body of email.

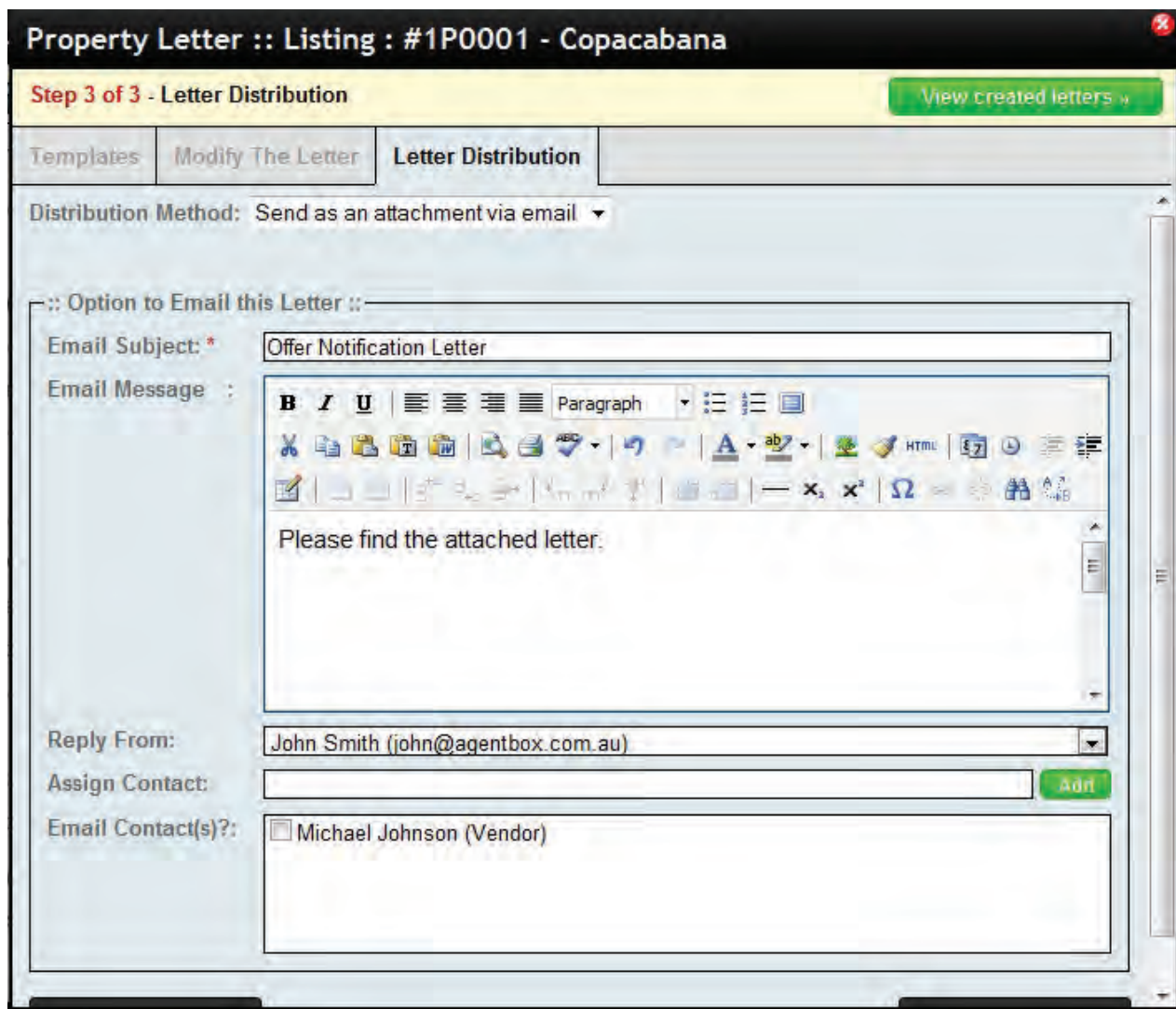
Reply From:

Assign Contact: [Add](#)

Email Contact(s)?: Michael Johnson (Vendor)

« Previous Step

Save & Proceed »



You may also like...

[How do I create a letter template?](#)

[How do I conduct a mail merge?](#)

Sales Advice

How do I generate a Sales Advice document?

1. [Search for your Property](#) and open the [Property Card](#)

:: Listing : ID#1P0001 - 1 Jones Street, Copacabana

Full View

General For Sale Features Open Homes Agents & Contacts Resources Commission

Status: Available

For Sale/Rental: For Sale

Type: * Residential

Category: * House

Investment?:

Sale Method: Private Treaty

Authority: Exclusive

Property Name:

Level No.: Unit No.: Street No.: 1


Street Name: * Jones Street Type: * Street

Suburb: * COPACABANA (2251) State: * NSW

Save

Copy This Property

Vendor Preview Link



2. Ensure the Selling Agent, Vendor, Vendor Solicitor, Buyer and Buyer Solicitor have been added to the property via the Agents & Contacts tab and any other data required for your sales advice templates.

:: Listing : #1P0001 - 1 Jones Street, Copacabana

Full View

General For Sale Features OFI **Agents & Contacts** Resources Commission

Role: (uncheck to de-select)

Agent:

Selected Agents:

- John Smith (Listing Agent)
- John Smith (Selling Agent)

Appear on Site:

- John Smith (Listing Agent)
- John Smith (Selling Agent)

:: Assign related Contacts ::

Role: (uncheck to de-select)

Contact:

Selected Contacts:

- Michael Johnson (Vendor)
- Julia Burn (Buyer Solicitor)
- David Kim (Vendor Solicitor)
- Mary May (Buyer)

3. Click the Letter Generator action icon 

4. Select the Purchaser Sales Advice template from the Select a Template drop down. Depending on your office set up you might have separate templates for purchaser and vendor sales advice or you might just have one.

Property Letter :: Listing : #1P0001 - Copacabana


Step 1 of 3 - Select Template View created letters

Select a Template:

:: Template Preview ::

Send From:

Purchaser Sales Advice



Your Agency
 4 Cornwallis Street, Eveleigh, NSW 2015
 Phone: 02 9209 4174
 Fax: 02 9310 7232
 Email: office@agentbox.com.au
 ABN: 11 222 112 142

Property Details

Property Address:	{ \$prop_loc }	
Contract Price:	{ \$sold_price }	Deposit Held:

5. Click Save & Proceed.

6. You can now modify the contents of the letter. By default, the contact details, sale price etc should be pulled from the contact cards and the property status. However, you can manually complete any missing information or adjust the contents of the letter at this point. All missing Variable data is highlighted as follows: **#SOLD_DATE#**

Property Letter :: Listing : #1P0001 - Copacabana

Step 2 of 3 - Modify The Letter View created letters »

Templates **Modify The Letter** Letter Distribution

B I U | [List Icons] | Format | Font size | [List Icons]

[Cut Copy Paste Icons] | [ABC Icon] | [A Icon] | [ab Icon] | [x₂ x² Icons] | [Ω £7 Icons] | [A A B Icons] | [Printer Icon]

AGENTBOX™ **Your Agency**
 4 Cornwallis Street, Eveleigh, NSW 2015
 Phone: 02 9209 4174
 Fax: 02 9310 7232
 Email: office@agentbox.com.au
 ABN: 11 222 112 142

Property Details

Property Address:	1 Jones Street, Copacabana, NSW 2251	
Contract Price:	\$1,250,000	Deposit Held:

Sales Details

« Previous Step Save & Proceed »

7. Click Save & Proceed

8. You can now click Print, to generate as a PDF download.

Distribution Method: Print as PDF


Print this Letter

Print

WinWord

« Previous Step

Opening 1322765322.pdf

You have chosen to open
 1322765322.pdf
which is a: Adobe Acrobat Document
from: http://admin.training.youragencies.com.au

What should Firefox do with this file?

Open with: Adobe Reader (default)

Save File

Do this automatically for files like this from now on.

OK Cancel

to the

« & Proceed »

1322765297.pdf - Adobe Reader

File Edit View Window Help

1 / 1 103%

Tools Comment

AGENTBOX™ Your Agency
 4 Cornwallis Street, Eveleigh, NSW 2015
 Phone: 02 9209 4174
 Fax: 02 9310 7232
 Email: office@agentbox.com.au
 ABN: 11 222 112 142

1st December 2011

Purchaser Sales Advice

Property Details

Property Address:	1 Jones Street, Copacabana, NSW 2251		
Contract Price:	\$1,250,000	Deposit Held:	\$125,000

Sales Details

Agency:	Your Agency	Agent:	John Smith
---------	-------------	--------	------------

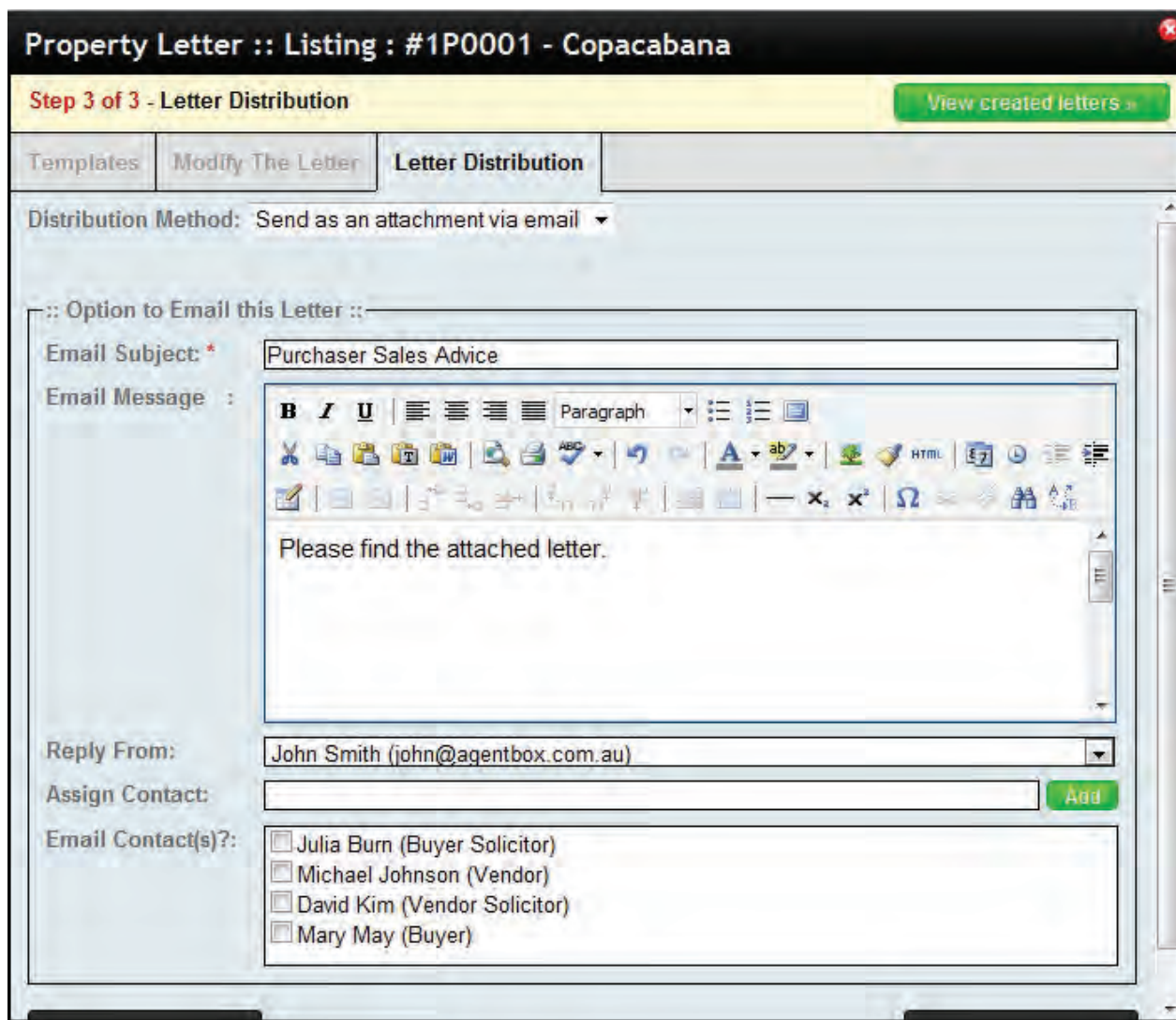
Vendor Details

Vendor Name:	Mr Michael Johnson		
Vendor Address:	PO Box 456 Sydney NSW 2000		
Vendor Phone:	02 9584 2533	Vendor Email:	mick@gmail.com
Vendor Solicitor Name:	David Kim		
Vendor Solicitor Address:	45 Kent St Sydney NSW 2000		
Vendor Solicitor Company:	Kim & Turner Lawyers	Vendor Solicitor Phone:	02 9100 1234
Vendor Solicitor Fax:		Vendor Solicitor Email:	dk@bigpond.net.au

Purchaser Details

Purchaser Name:	Miss Mary May		
Purchaser Address:	1 Miles Road Camperdown NSW 2050		
Purchaser Phone:	02 9523 5642	Purchaser Email:	mm@hotmail.com

9. Or send as a PDF attachment via email by selecting from the Distribution Method dropdown menu.



You may also like...

[How do I change the Office Details on the Sales Advice template?](#)

Create Digital Media

How do I create an A4 Brochure or Window Card for a Property in Agentbox?

1. [Search for your Property](#) and open the [Property Card](#)

:: Listing : ID#1P0001 - 1 Jones Street, Copacabana

Full View

General For Sale Features Open Homes Agents & Contacts Resources Commission

Status: Available

For Sale/Rental: For Sale

Type: * Residential

Category: * House

Investment?:

Sale Method: Private Treaty

Authority: Exclusive

Property Name:

Level No.: Unit No.: Street No.: 1

Street Name: * Jones Street Type: * Street


Suburb: * COPACABANA (2251) State: * NSW

Save



Copy This Property

Vendor Preview Link

2. Click on the Create Media Action Icon 
3. Click on the Select Type dropdown
In this example we are using an A4 Brochure
4. Click on A4 Brochure


Create Digital Print

Step 1 of 3 - Select a template [View Previous Prints](#)

Select Template Edit Details Print or Send

Please Note : This Digital Print Area is for printing purposes only. It is not designed to be used for Bulk E-Mail Newsletters.

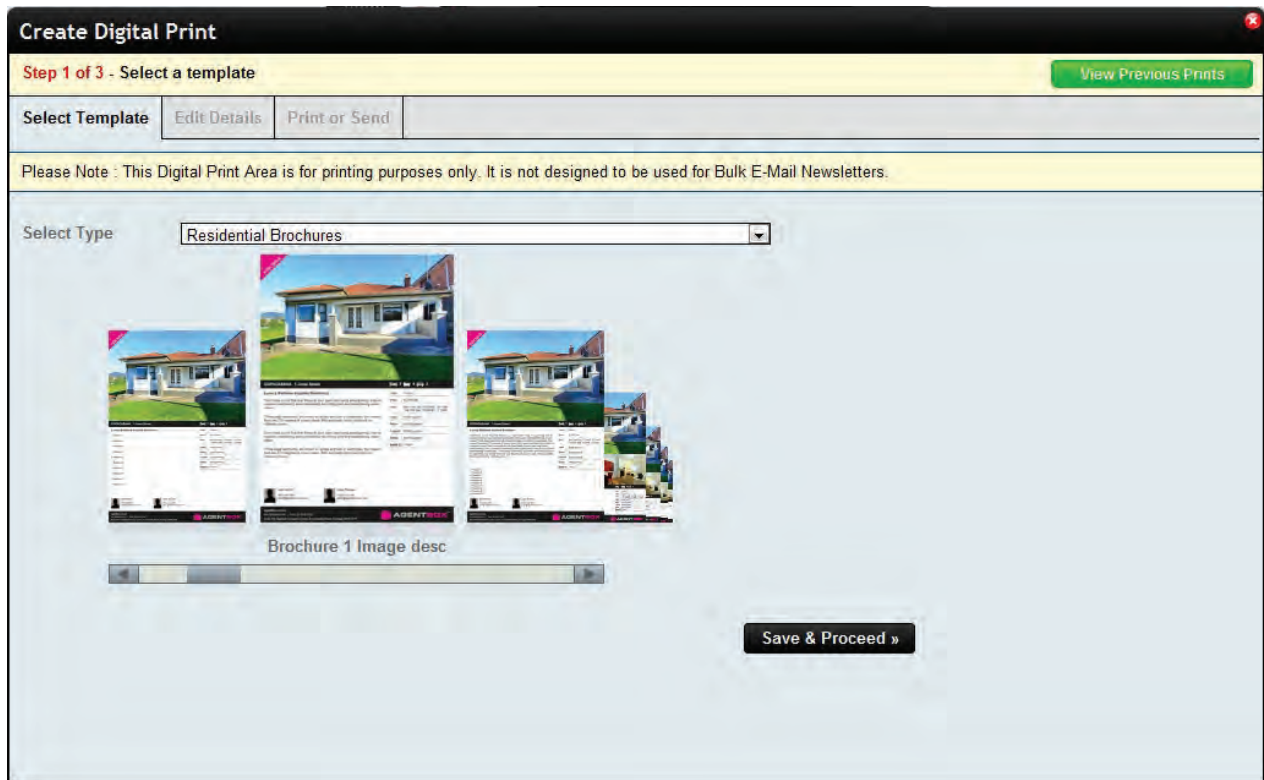
Select Type Residential Brochures



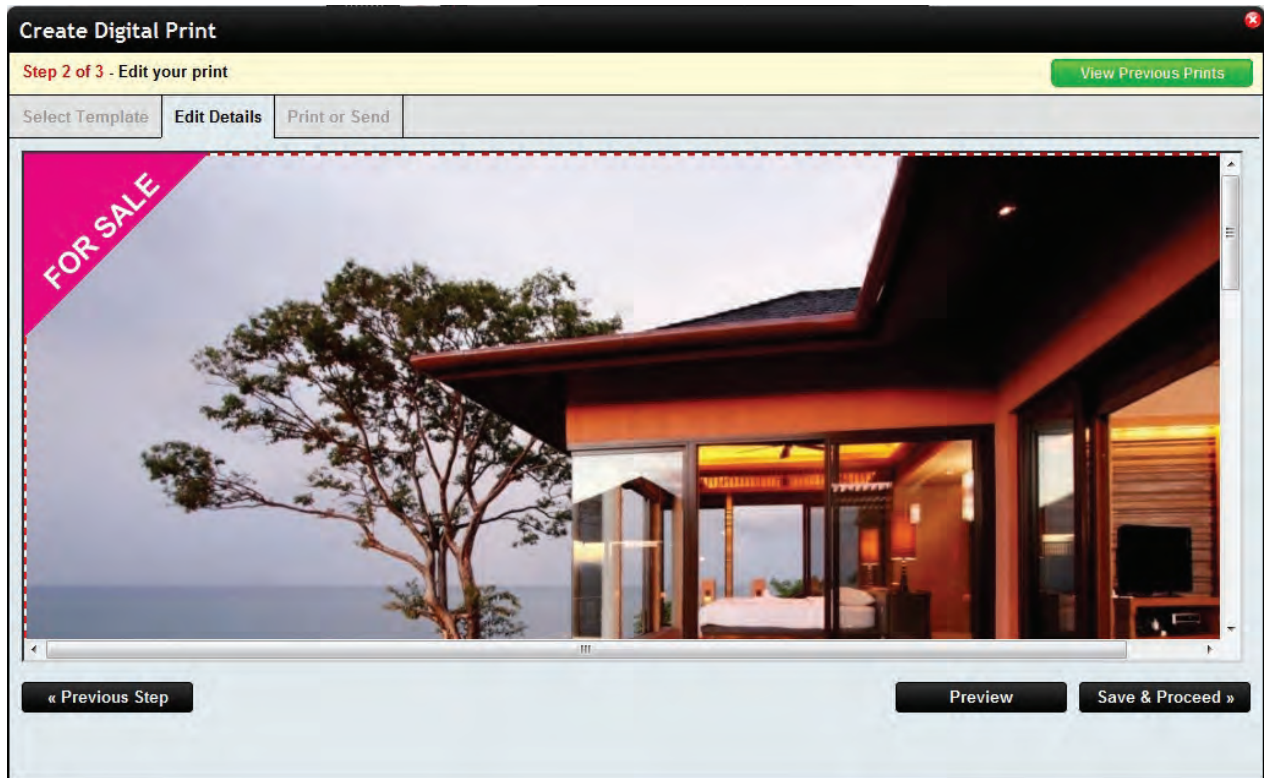
Brochure 1 Image bullets

Save & Proceed »

5. Click on the required Template

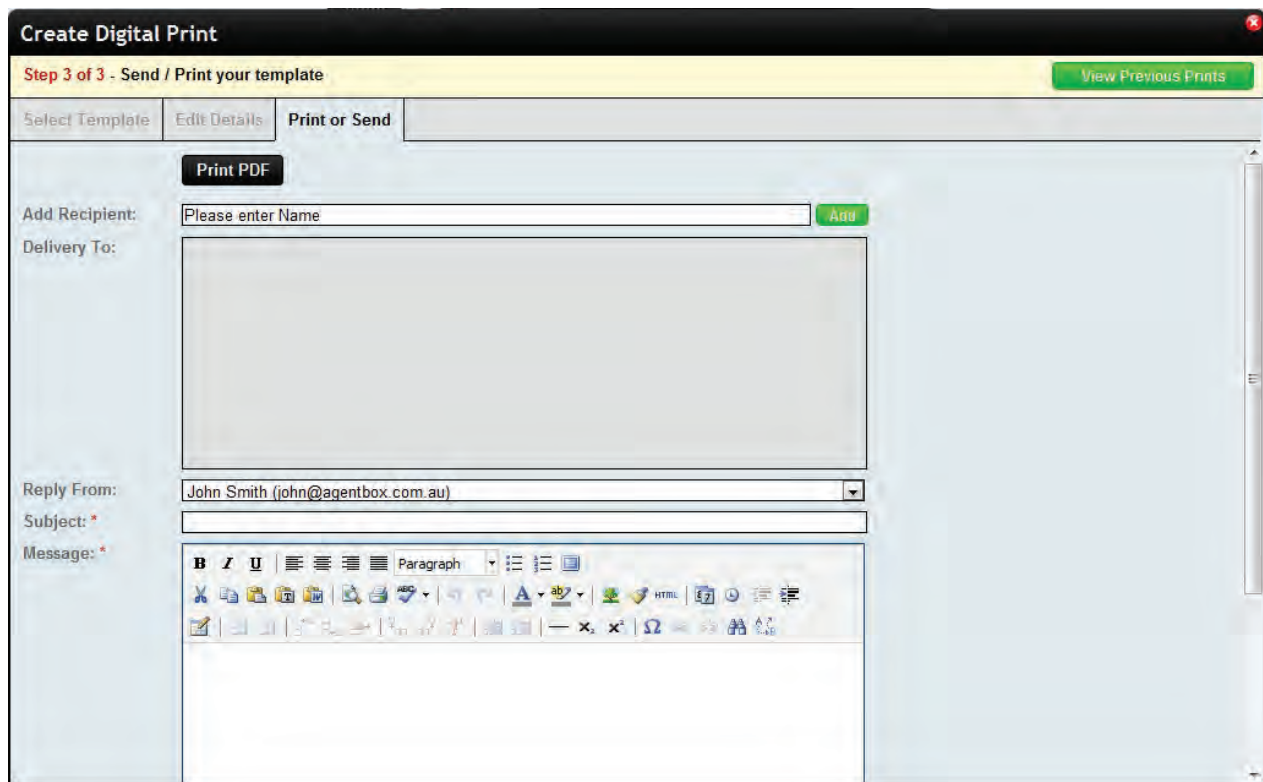


6. Click on Save & Proceed



7. Click Preview to view a preview of the final brochure

8. When you are satisfied with the final brochure click Save & Proceed



Either

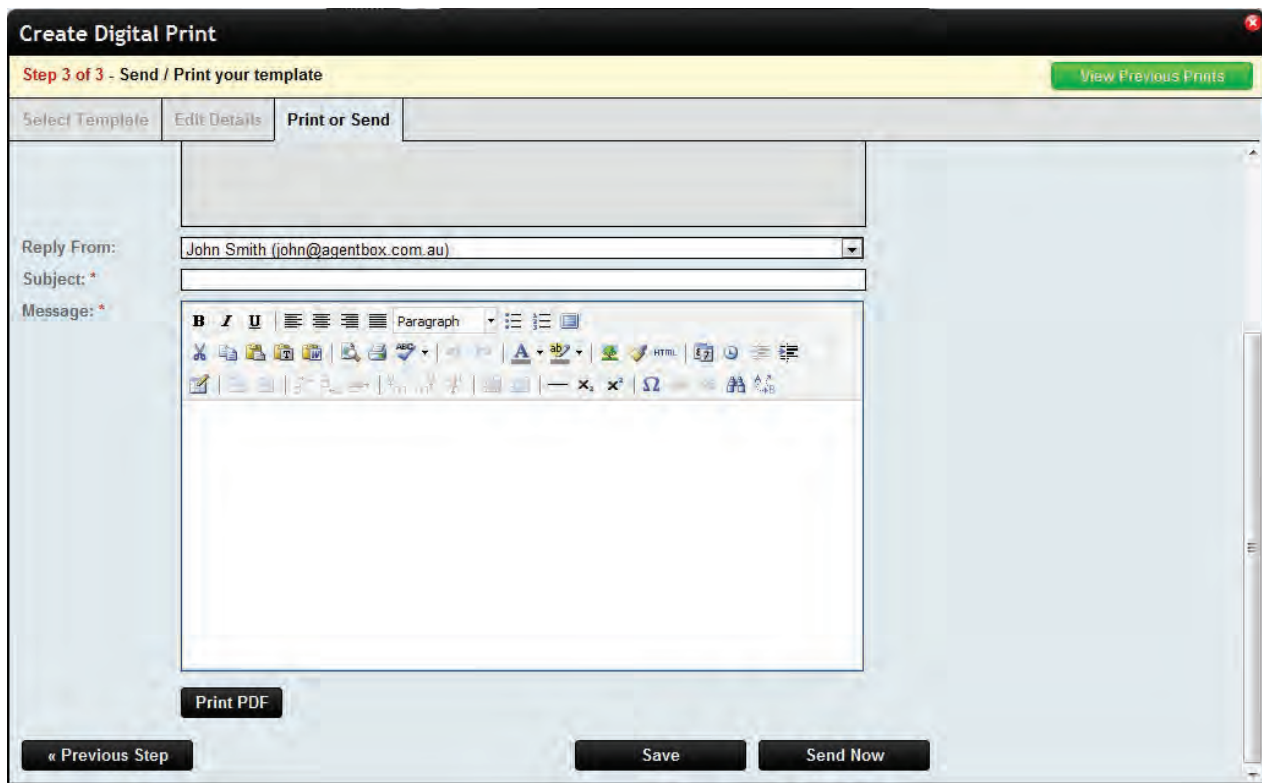
9. Click on Print PDF to generate a hi resolution PDF brochure
10. Click Save

Or

to email the Brochure

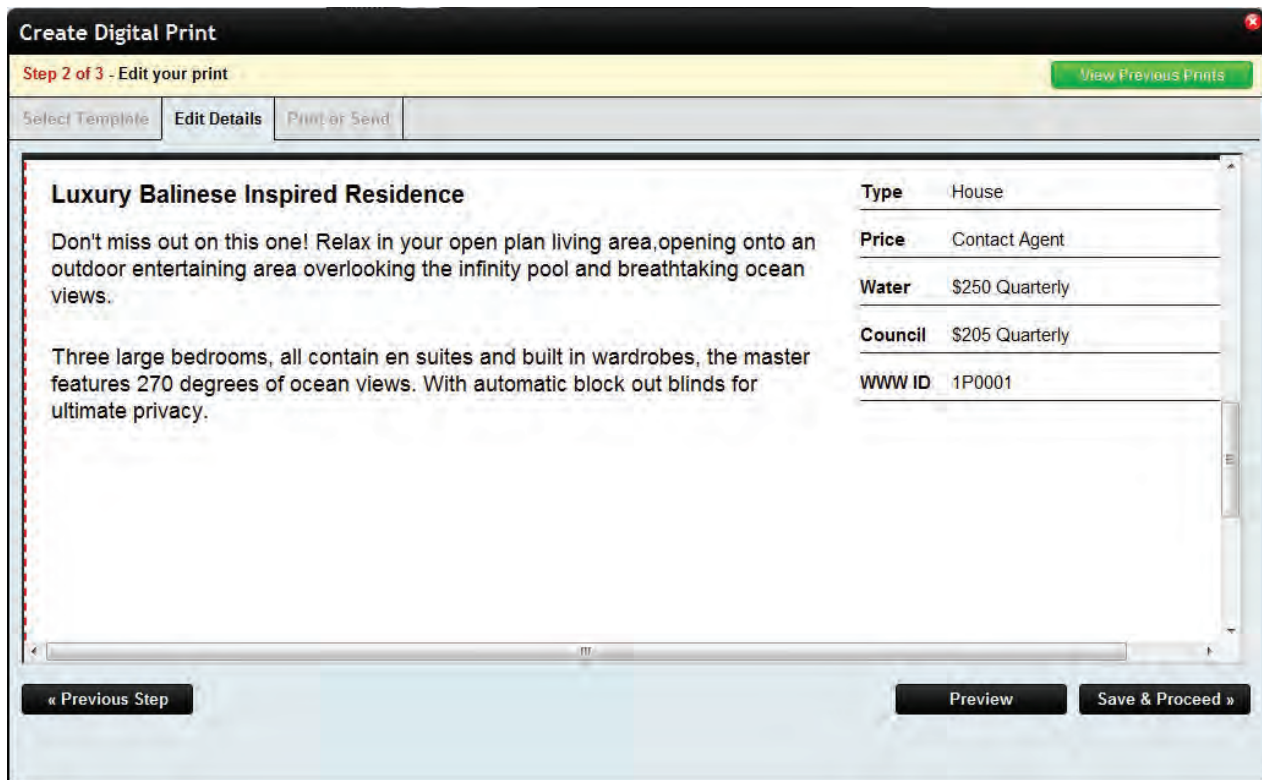
11. Enter Recipient and click on their name
12. Click on Add
13. Enter a Subject
14. Enter a Message
14. Click on Send Now

**Note: This will send an email with the Brochure or Window card as an attachment.*



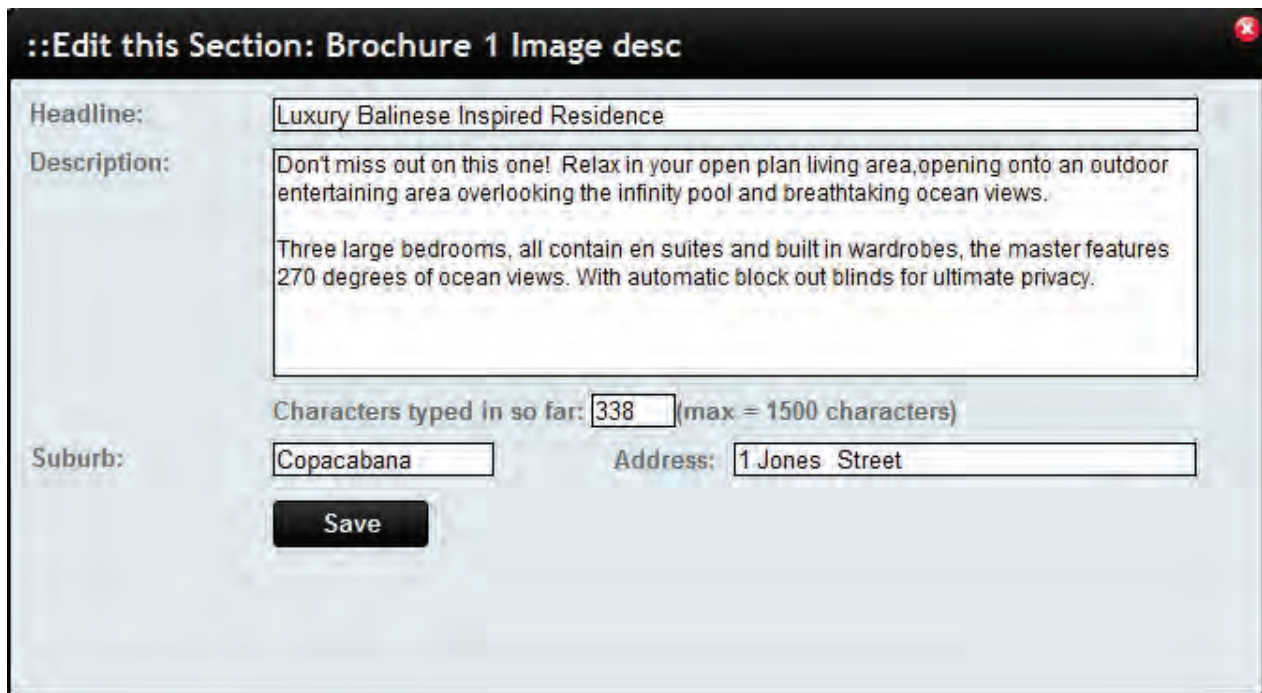
How do I alter the Headline and Description of a Brochure for a Property in Agentbox?

1. Click on the headline or description highlighted by a red dashed border



2. Edit Heading and Description

3. Click on Save



The screenshot shows a web form for editing a brochure section. The title is "Edit this Section: Brochure 1 Image desc". The form contains the following fields and text:

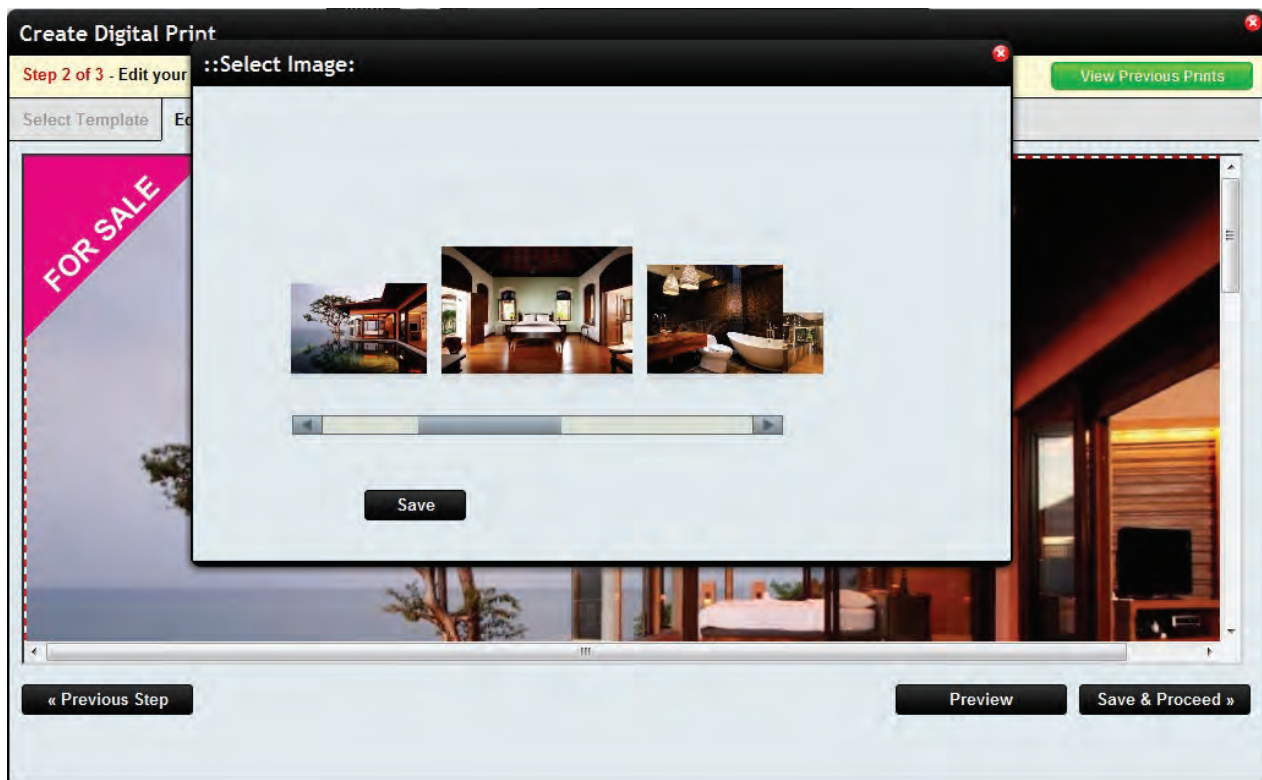
- Headline:** A text input field containing "Luxury Balinese Inspired Residence".
- Description:** A large text area containing two paragraphs of text:

Don't miss out on this one! Relax in your open plan living area, opening onto an outdoor entertaining area overlooking the infinity pool and breathtaking ocean views.

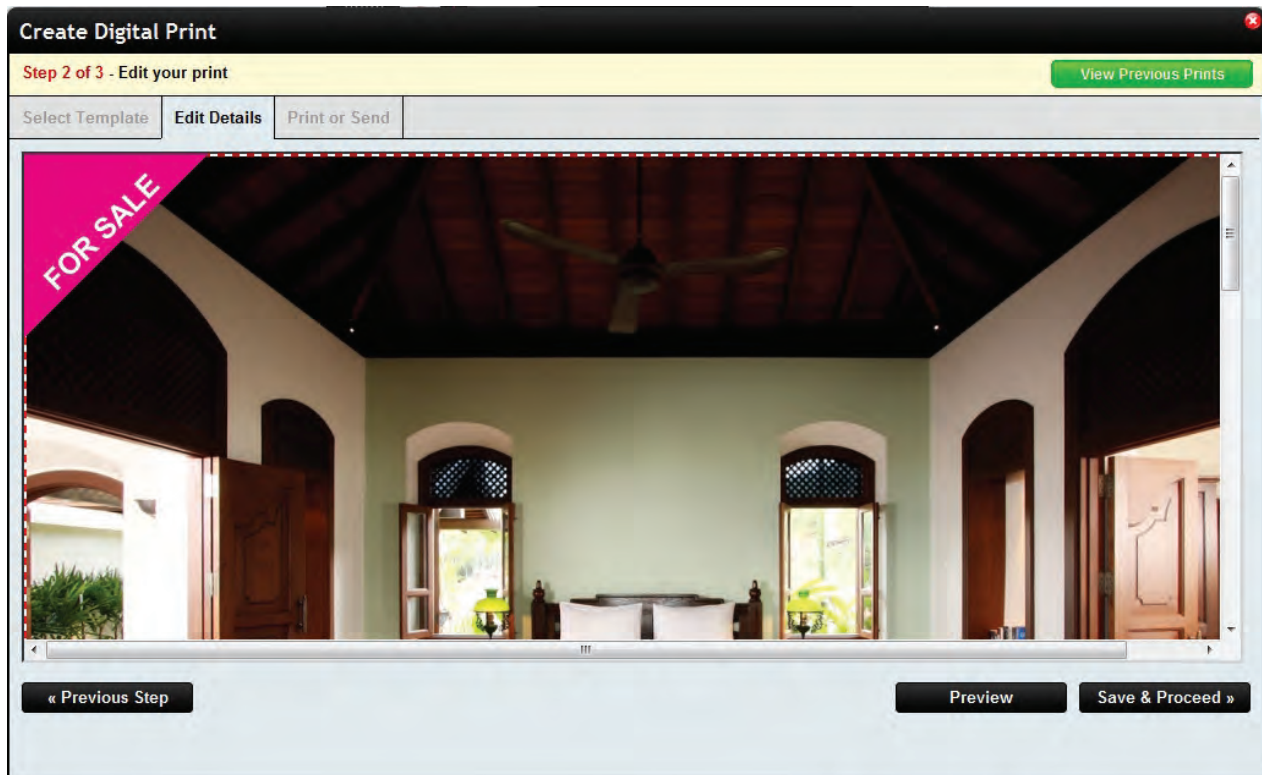
Three large bedrooms, all contain en suites and built in wardrobes, the master features 270 degrees of ocean views. With automatic block out blinds for ultimate privacy.
- Character count:** A label "Characters typed in so far:" followed by a small input field containing "338" and the text "(max = 1500 characters)".
- Suburb:** A text input field containing "Copacabana".
- Address:** A text input field containing "1 Jones Street".
- Save:** A black button with the text "Save" in white.

How do I alter the Photo in my Brochure for a Property in Agentbox?

1. Click on the photo in the brochure highlighted by a red dashed border
2. Select the Photo you wish to use
3. Click on Save



4. The new Photo will appear on Brochure



Property Hits

How do I view website hits for a property?

**Note: this refers to web hits from your website not from the portals.*

1. [Search for your Property](#) and open the [Property Card](#)

:: Listing : ID#1P0001 - 1 Jones Street, Copacabana

Full View

General For Sale Features Open Homes Agents & Contacts Resources Commission

Status: Available
For Sale/Rental: For Sale
Type: * Residential
Category: * House
Investment?:
Sale Method: Private Treaty
Authority: Exclusive
Property Name:
Level No.: Unit No.: Street No.: 1
Street Name: * Jones Street Type: * Street
Suburb: * COPACABANA (2251) State: * NSW

Copy This Property
Vendor Preview Link

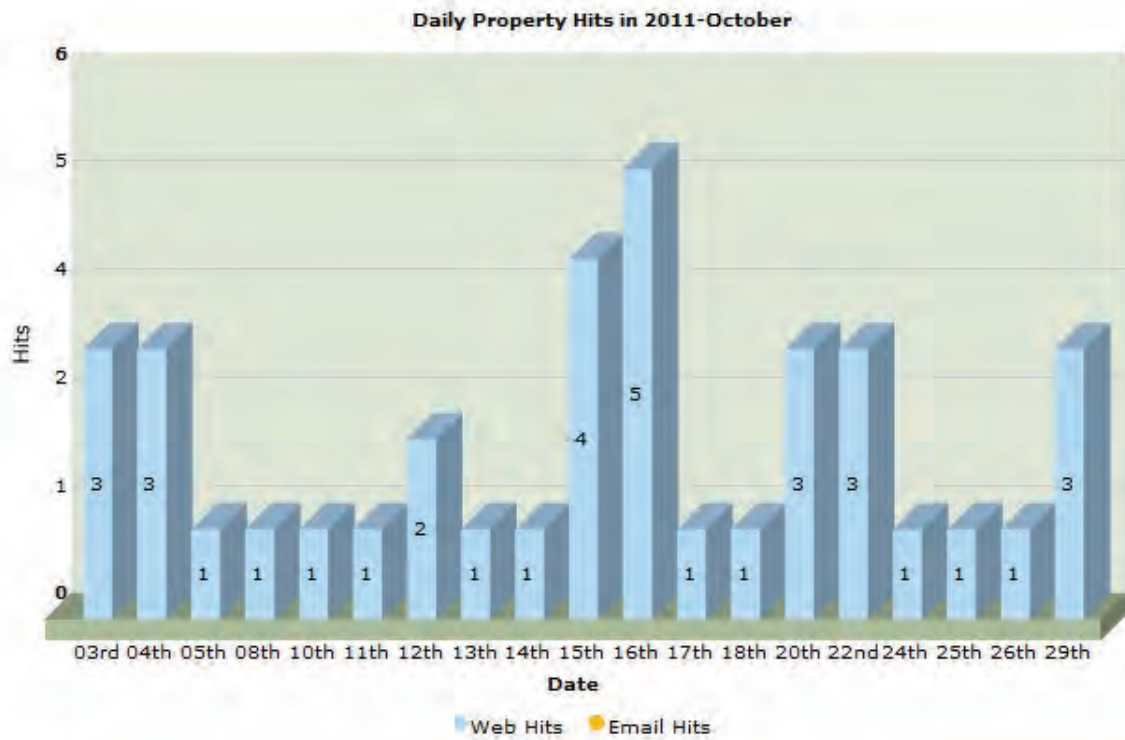
Save

2. Click on the Property Hits action icon 

3. By default you can view the hits for a month



4. Click on the month to view hits per day.




4. Once finished click the red cross to close the panel

Portal Feed Logs

How can I check whether my property has successfully uploaded or updated on a portal?

1. [Search for your Property](#) and open the [Property Card](#)

2. You can check the portal feed logs for a property by clicking the portal feed action icon  at the top of the property card. If there is an error message, make the required corrections to the property and hit save to resend to the portal.

:: Listing : ID#1P0005 - 33-35 Main Street, Sydney

Full View

General For Lease Features Open Homes Agents & Contacts Resources

Status: Offline

For Sale/Rental: For Lease

Type: * Holiday

Category: * House

Property Name:

Level No.: Unit No.: Street No.: 33-35

Street Name: * Main Street Type: * Street

Suburb: * SYDNEY (2000) State: * NSW

Hide Address?: Tick to hide the address on your web site.
 Tick to edit address for your web display format.

Address Format: 33-35 Main Street

Save

Copy This Property

3. Select the portal from the Portal drop down menu to view the feed.

:: Portal Export Logs : 1P0005 - Sydney


Portal: Realestate.com.au

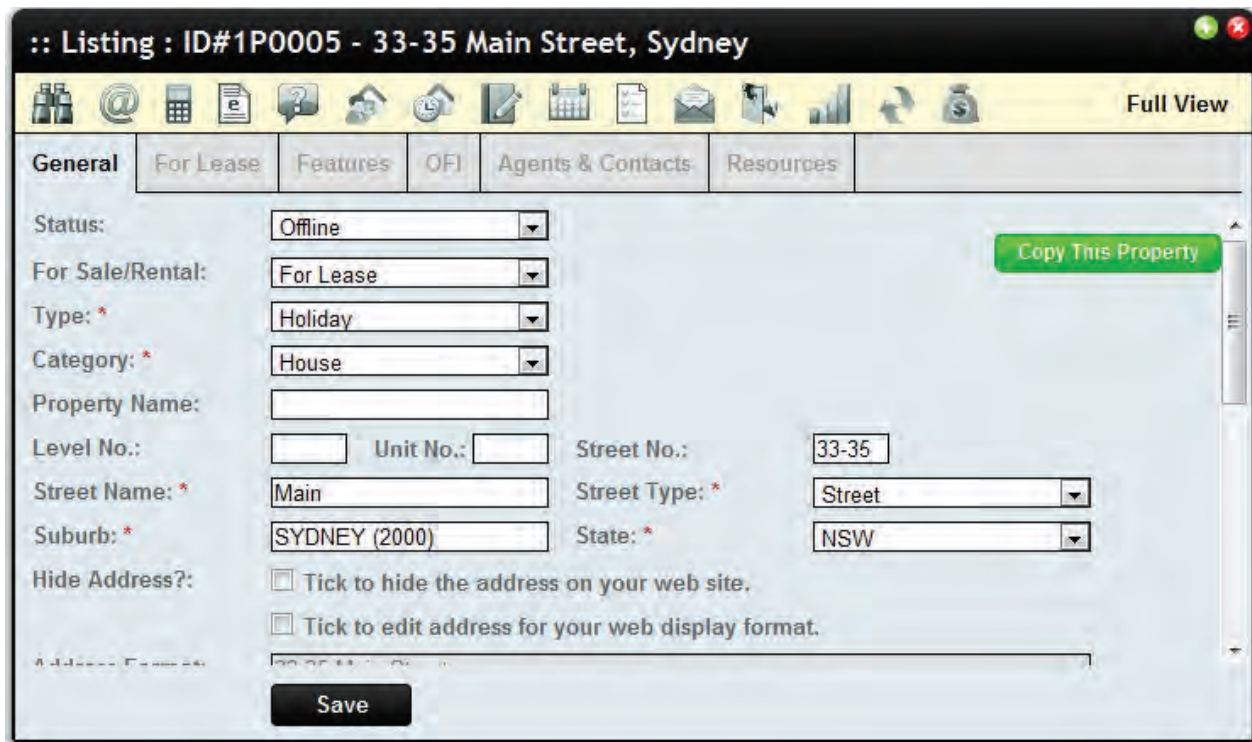
Export Date	Processed Date	Portal Property ID	Portal Message
13/04/12 12:05pm	13/04/12 12:07pm	110167957	
12/04/12 10:05am	12/04/12 10:07am	110167957	
11/04/12 04:05pm	11/04/12 04:06pm	110167957	
11/04/12 03:05pm	11/04/12 03:06pm	110167957	
05/04/12 05:05pm	05/04/12 05:07pm	110167957	
05/04/12 03:05pm	05/04/12 03:07pm	110167957	
05/04/12 12:05pm	05/04/12 12:06pm	110167957	
05/04/12 10:05am	05/04/12 10:06am	110167957	

4. If you have checked the portal logs and there is no issue recorded in the portal message please contact support@agentbox.com.au who will investigate this issue for you. Please allow a minimum of 1 hour for the feed to be sent and only call/email support if 4 hours or more have passed.

Marketing Funds

How do I log Marketing Funds?

1. [Search for your Property](#) and open the [Property Card](#)
2. Click on the Marketing Funds action icon 



:: Listing : ID#1P0005 - 33-35 Main Street, Sydney

Full View

General For Lease Features OFI Agents & Contacts Resources

Status: Offline

For Sale/Rental: For Lease [Copy This Property](#)

Type: * Holiday

Category: * House

Property Name:

Level No.: Unit No.: Street No.: 33-35

Street Name: * Main Street Type: * Street

Suburb: * SYDNEY (2000) State: * NSW

Hide Address?:
 Tick to hide the address on your web site.
 Tick to edit address for your web display format.

Address Format:

Save

How do I track Marketing Funds and Expenditure?

The marketing funds system in Agentbox allows you to


1. [Log approved funds](#)
2. [Log expenses against a property](#) e.g. photography and signboard costs and note who is responsible for the costs e.g. the office, agent, vendor. You can also share the costs across these people.
3. [Mark a full or part payment against the approved funds](#)
4. [Print a report for the Vendor or Accounts department](#)

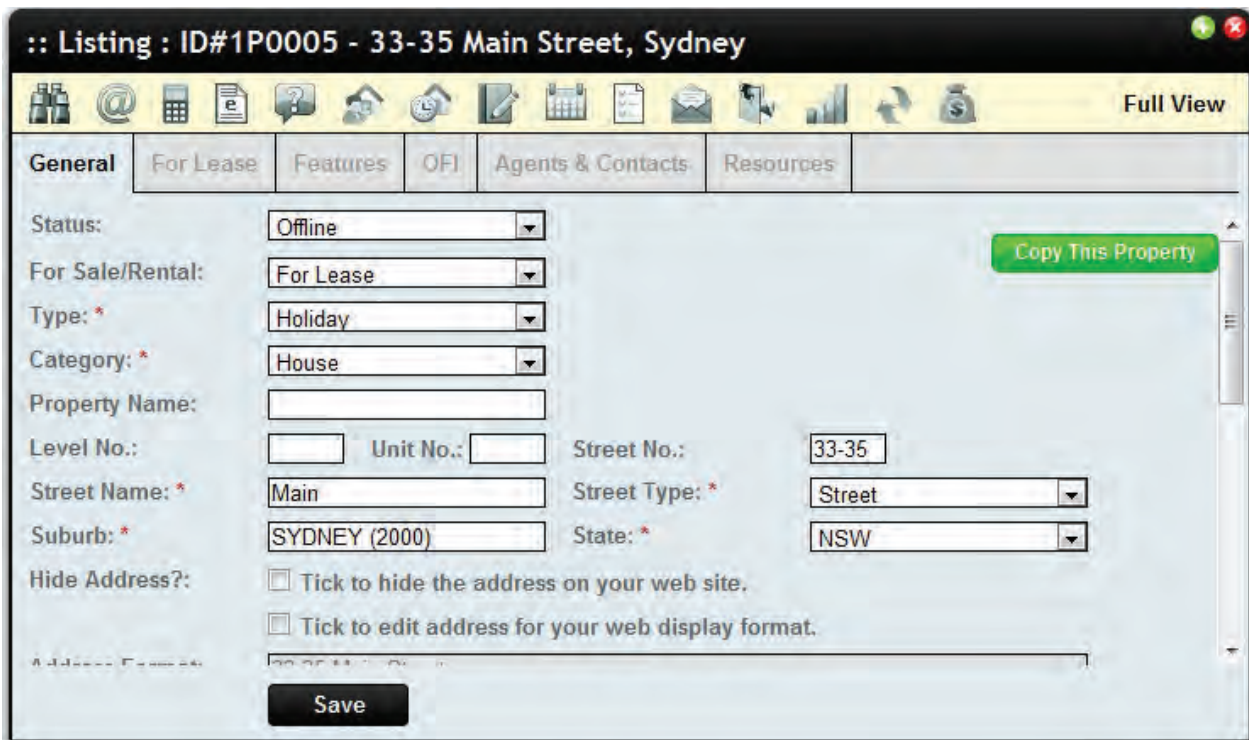
**Note - If a payment has been logged against the approved funds, the report will show you a balance of how much you have left to spend. If the payment has not been made, the report will display how much the client owes and can be used to chase a payment.*

In this example the Vendor has approved \$3000.00 to spend on marketing during their Auction Campaign. There has been \$1500.00 worth of logged expenses so a report needs to be printed to send alongside an invoice requesting payment. We will then log a full payment against the property and generate the report to view the balance of received funds.

Log Marketing Funds

How do I log approved marketing funds?

1. [Search for your Property](#) and open the [Property Card](#)
2. Click on the Marketing Funds action icon 



:: Listing : ID#1P0005 - 33-35 Main Street, Sydney

Full View

General For Lease Features OFI Agents & Contacts Resources

Status: Offline

For Sale/Rental: For Lease

Type: * Holiday

Category: * House

Property Name:

Level No.: Unit No.: Street No.: 33-35

Street Name: * Main Street Type: * Street

Suburb: * SYDNEY (2000) State: * NSW

Hide Address?:
 Tick to hide the address on your web site.
 Tick to edit address for your web display format.

Address:

Save

Copy This Property

3. In the first tab - Marketing Funds click the Add new funding button.



o Enter the Date, approved amount and any comments and click Save

Add Fund

Approved Date:* 13 12 2011

Approved Amount \$:* 3000

Comment:

Save Cancel

4. You can now Edit or Delete this fund in the Funds approved column of the Marketing Funds tab. Or [add a payment](#) if the funds have been approved.

:: Marketing Funds : #1P0005 - 33-35 Main Street, Sydney


Marketing Funds Current Expenditures Add New Funding

Date	Comments	Funds Approved	Funds Received
13 Dec 11		\$3,000.00 Edit Delete	Add Payment
	Total:	\$3,000.00	\$0.00

Print

Record Expenses

How do I record expenses against a property?

1. [Search for your Property](#) and open the [Property Card](#)
2. Click on the Marketing Funds action icon 

:: Listing : ID#1P0005 - 33-35 Main Street, Sydney

Full View

General For Lease Features OFI Agents & Contacts Resources

Status:

For Sale/Rental:

Type: *

Category: *

Property Name:

Level No.: Unit No.: Street No.:

Street Name: * Street Type: *

Suburb: * State: *

Hide Address?: Tick to hide the address on your web site.
 Tick to edit address for your web display format.

Save Copy This Property

3. Click on the Current Expenditures Tab



4. Click Add New Expense

- o Enter the date of expense
- o Select the supplier (refer to how to add a supplier)
- o Select the item or create a new one
- o Select a Quantity and the Price will automatically calculate
- o By ticking the paid box you can record who is responsible for this expense, in this case half will be paid by the office and half by the vendor.
- o Enter the comments and click Save

:: Current Expenditures : #1P0005 - 33-35 Main Street, Sydney

Marketing Funds | Current Expenditures

Start Date: * 13 12 2011

Supplier: * Sam Jones Sj Photogra

Purchase Item: * 8 Photographs (\$880.00)

Qty.: * 1

Price \$: * 880 Paid?

Paid By: * Office Amount \$: 440

Office \$440
 (VENDOR) Michael Johnson \$440

Comment:

5. Repeat step 4 until all expenses have been logged.

In this example the total expenditure to be paid by the Vendor totals \$1500.00, because they have not made a [payment](#) against the marketing fund, this shows in red how much they owe. If they had made a payment, it would show how much they have left to spend from their approved funds.

:: Current Expenditures : #1P0005 - 33-35 Main Street, Sydney


Marketing Funds | Current Expenditures

Date	Supplier	Items	Cost	Office Paid	Agent Paid	Vendor Paid	
13 Dec 11	Sam Jones Sj Photography	(1) 8 Photographs	\$880.00	\$440.00	\$0.00	\$440.00	<input type="button" value="Delete"/>
13 Dec 11	Thomas Train Signboards R Us	(1) Signboard	\$500.00	\$0.00	\$0.00	\$500.00	<input type="button" value="Delete"/>
13 Dec 11	Apex Printers	(1) Brochures	\$560.00	\$0.00	\$0.00	\$560.00	<input type="button" value="Delete"/>
		Total:	\$1,940.00	\$440.00	\$0.00	\$1,500.00	
					Funds Approved:	\$3,000.00	
					Funds Received:	\$0.00	
					Balance Of	-\$1,500.00	

6. You can click Print to [generate a report](#) for the client.

Log Payment

How do I record a full or part payment against an approved marketing fund?

1. [Search for your Property](#) and open the [Property Card](#)
2. Click on the Marketing Funds action icon 
3. In the first tab - Marketing Funds click Add Payment in the funds received column next to the approved funding.



The screenshot shows a web application window titled ":: Marketing Funds : #1P0005 - 33-35 Main Street, Sydney". The window contains a tabbed interface with "Marketing Funds" selected and "Current Expenditures" as a sub-tab. A table lists funding entries. The first entry is for "13 Dec 11" with "Funds Approved" of "\$3,000.00" and "Funds Received" of "\$0.00". The "Funds Approved" cell includes "Edit" and "Delete" buttons. The "Funds Received" cell includes an "Add Payment" button. A "Total:" row shows a total of "\$3,000.00" approved and "\$0.00" received. A "Print" button is located below the table. A green "Add New Funding" button is in the top right of the table area.

Date	Comments	Funds Approved	Funds Received
13 Dec 11		\$3,000.00 Edit Delete	Add Payment
	Total:	\$3,000.00	\$0.00

4. Click Add Payment in the Funds Received column of the Marketing funds tab.
 - o Enter the amount received, payment method, comments and click save

Add Payment for \$3,000.00

Date Paid:* 2011

Amount Paid \$:*

Payment Method:*

Comment:

5. To add another payment repeat step 4.
6. Once added you can edit or delete a payment or [print a report](#).

:: Marketing Funds : #1P0005 - 33-35 Main Street, Sydney

Marketing Funds

Date	Comments	Funds Approved	Funds Received
13 Dec 11		\$3,000.00 <input type="button" value="Edit"/> <input type="button" value="Delete"/>	<input type="button" value="Add Payment"/>
13 Dec 11	Paid By Direct Debit Full Payment		\$3,000.00 <input type="button" value="Edit"/> <input type="button" value="Delete"/>
	Total:	\$3,000.00	\$3,000.00

Print Report

How do I Print a Marketing funds report?

1. [Search for your Property](#) and open the [Property Card](#)
2. Click on the Marketing Funds action icon

:: Listing : ID#1P0005 - 33-35 Main Street, Sydney

Full View

General | For Lease | Features | OFI | Agents & Contacts | Resources

Status:

For Sale/Rental:

Type: *

Category: *

Property Name:

Level No.: Unit No.: Street No.:

Street Name: * Street Type: *

Suburb: * State: *

Hide Address?: Tick to hide the address on your web site.
 Tick to edit address for your web display format.

Address:

3. Click Print

**Note: If a payment has been logged against the approved funds, the report will show you a balance of how much you have left to spend. If the payment has not been made, the report will display how much the client owes and can be used to chase a payment.*

:: Marketing Funds : #1P0005 - 33-35 Main Street, Sydney

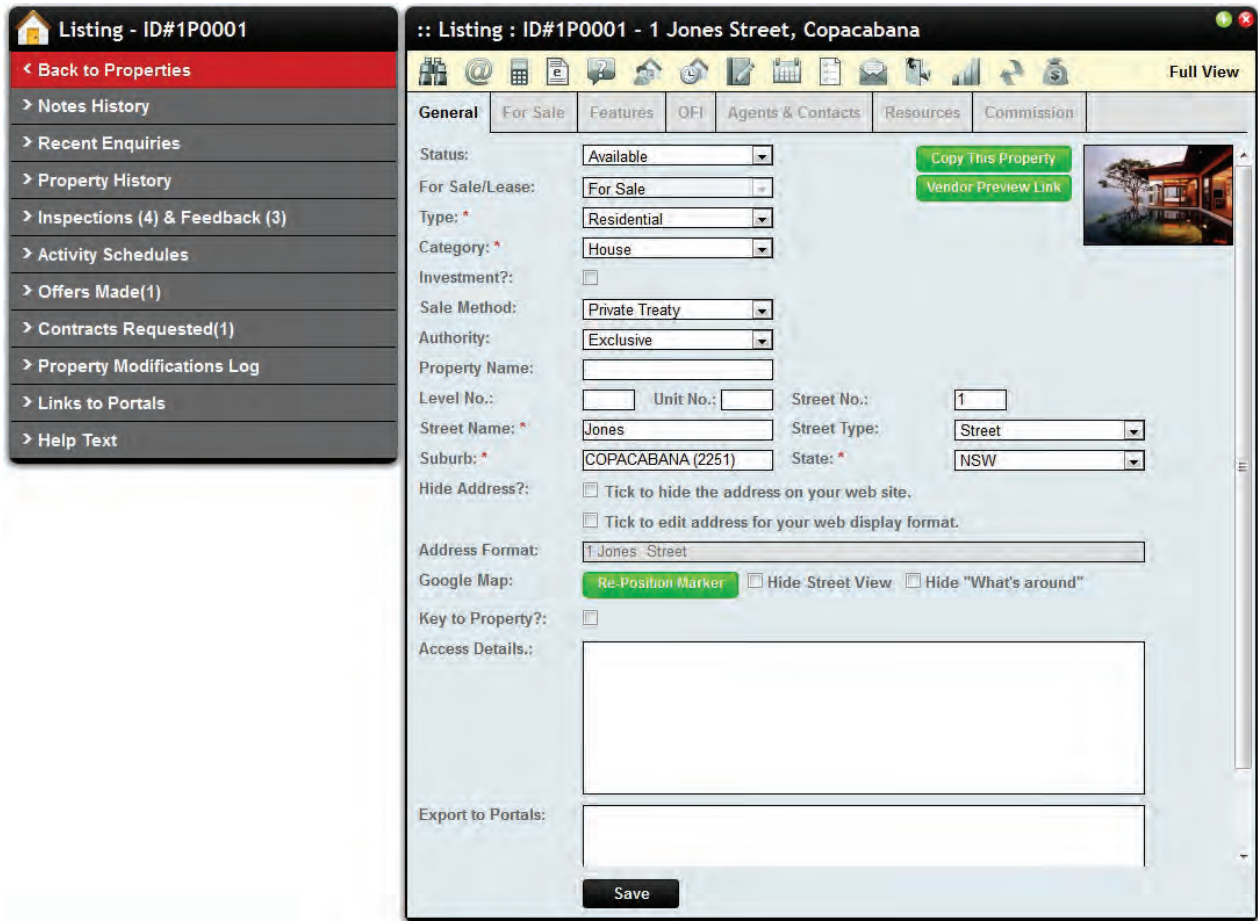
Marketing Funds | Current Expenditures

Date	Comments	Funds Approved	Funds Received
13 Dec 11		\$3,000.00 <input type="button" value="Edit"/> <input type="button" value="Delete"/>	<input type="button" value="Add Payment"/>
	Total:	\$3,000.00	\$0.00

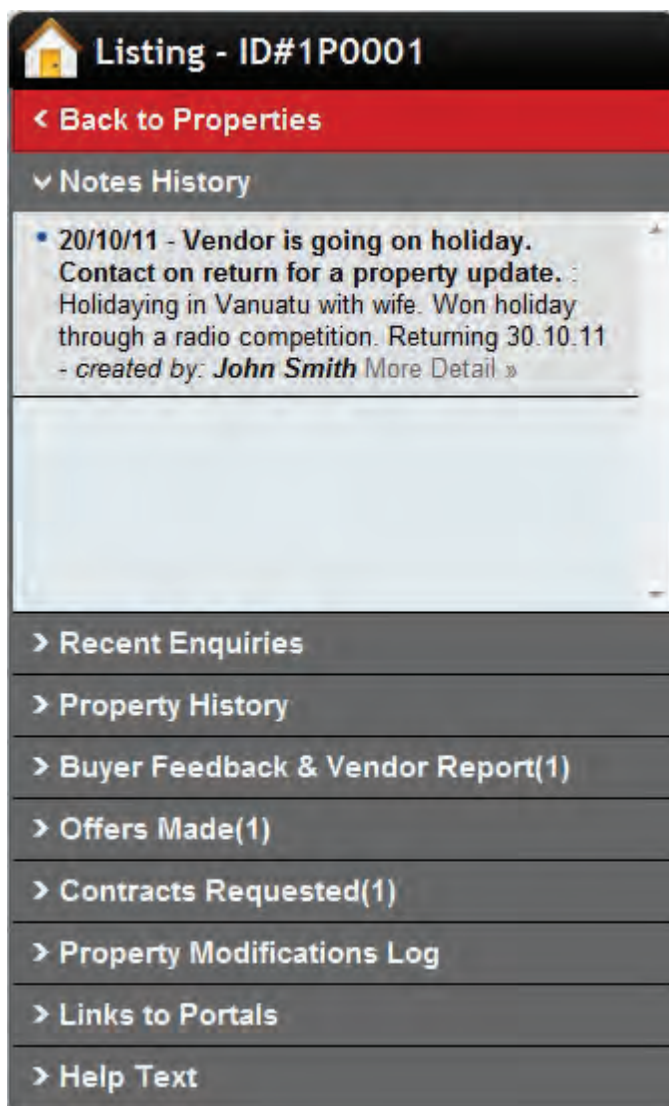
Notes History

How do I view all notes logged against a property?

1. [Search for your Property](#) and open the [Property Card](#)



2. Click on Notes History on the Left Property Panel (If the matching left panel is not visible, click Full View in the top right hand corner of the property card).
3. Here you can view a list of all Notes for the property that were logged using the Add a Note action icon.
4. Click More Detail next to open the corresponding note.



Property History

How do I view the history of my property?

1. [Search for your Property](#) and open the [Property Card](#)

Listing - ID#1P0001

< Back to Properties

- > Notes History
- > Recent Enquiries
- > Property History
- > Inspections (4) & Feedback (3)
- > Activity Schedules
- > Offers Made(1)
- > Contracts Requested(1)
- > Property Modifications Log
- > Links to Portals
- > Help Text

:: Listing : ID#1P0001 - 1 Jones Street, Copacabana

Full View

General | For Sale | Features | OFI | Agents & Contacts | Resources | Commission

Status: Copy This Property

For Sale/Lease: Vendor Preview Link

Type: *

Category: *

Investment?:

Sale Method:

Authority:

Property Name:

Level No.: Unit No.: Street No.:

Street Name: * Street Type:

Suburb: * State: *

Hide Address?: Tick to hide the address on your web site.
 Tick to edit address for your web display format.

Address Format:

Google Map: Re-Position Marker Hide Street View Hide "What's around"

Key to Property?:


Access Details.:

Export to Portals:

Save

2. Click on Property History on the Left Property Panel (If the matching left panel is not visible, click Full View in the top right hand corner of the property card).

3. Here you can view a snapshot of all key dates, and prices e.g. appraisal price, Listing Date, Agency Expiry etc.

 Listing - ID#1P0001

< Back to Properties

> Notes History

> Recent Enquiries

∨ Property History

Sold Price:	\$1,250,000
Commission %:	2%
Listing Date:	19/08/11
Agency Expiry Date:	17/11/11
Sold Date:	01/09/11
Activation Date:	09/09/11
Days On Market:	82 days

> Buyer Feedback & Vendor Report(1)

> Offers Made(1)

> Contracts Requested(1)

> Property Modifications Log

> Links to Portals

> Help Text

Inspection Feedback

How do I Add Feedback after a Property Inspection into Agentbox?

1. [Search for your Property](#) and open the [Property Card](#)

**Note: if you can't see the matching left property panel, click 'Full View' on the top right hand corner of the property card.*

Listing - ID#1P0001

< Back to Properties

- > Notes History
- > Recent Enquiries
- > Property History
- > Inspections (4) & Feedback (3)
- > Activity Schedules
- > Offers Made(1)
- > Contracts Requested(1)
- > Property Modifications Log
- > Links to Portals
- > Help Text

:: Listing : ID#1P0001 - 1 Jones Street, Copacabana

Full View

General | For Sale | Features | OFI | Agents & Contacts | Resources | Commission

Status: Available Copy This Property

For Sale/Lease: For Sale Vendor Preview Link

Type: * Residential

Category: * House

Investment?:

Sale Method: Private Treaty

Authority: Exclusive

Property Name:

Level No.: Unit No.: Street No.: 1

Street Name: * Jones Street Type: Street

Suburb: * COPACABANA (2251) State: * NSW

Hide Address?: Tick to hide the address on your web site.
 Tick to edit address for your web display format.

Address Format: 1 Jones Street

Google Map: Re-Position Marker Hide Street View Hide "What's around"


Key to Property?:

Access Details.:

Export to Portals:

Save

2. Click on 'Inspection & Feedback' on the left property card panel

 Listing - ID#1P0001

< Back to Properties

> Notes History

> Recent Enquiries

> Property History

∨ Inspections (4) & Feedback (3)

Date	Period	Add By Appointment
07/12/2011	10:00 AM - 10:30 AM	Feedback
10/11/2011	09:00 AM - 10:00 AM	Feedback
07/11/2011	10:00 AM - 10:30 AM	Feedback
05/11/2011	10:00 AM - 10:30 AM	Feedback

All Viewers Feedback Report

> Activity Schedules

> Offers Made(1)

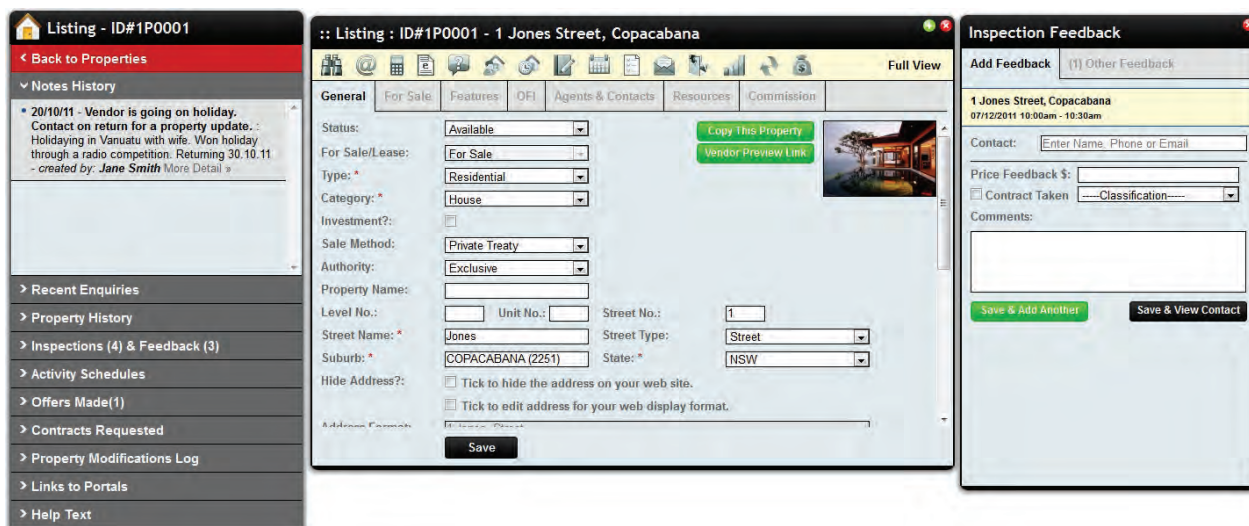
> Contracts Requested

> Property Modifications Log

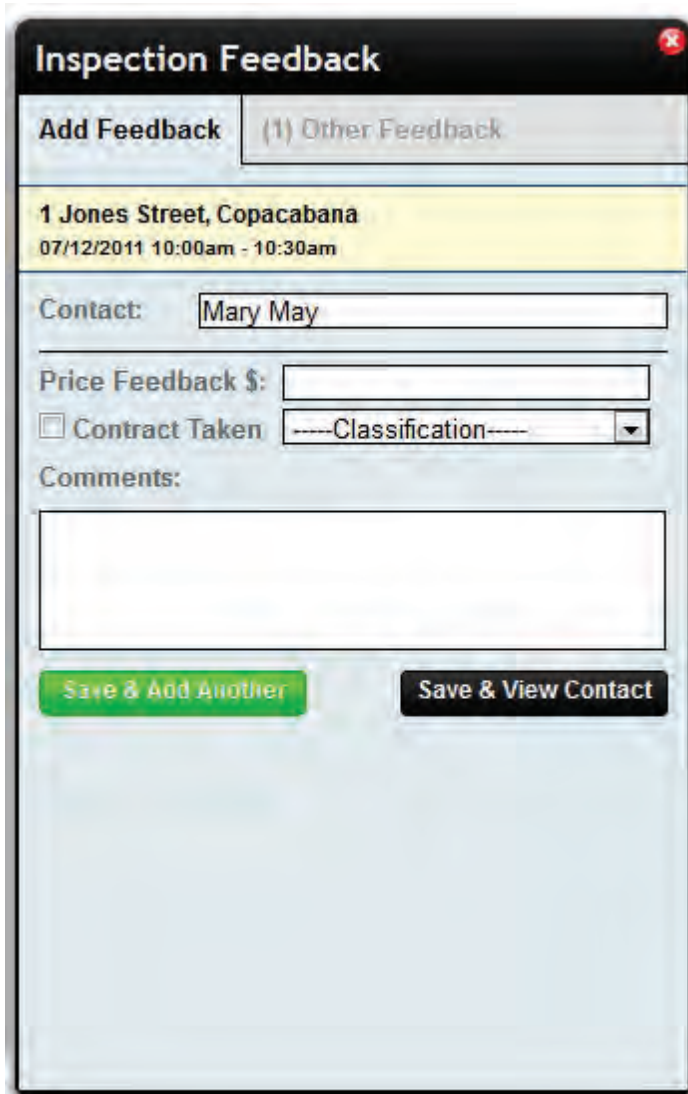
> Links to Portals

> Help Text

3. Click on the green 'Feedback' button next to the property inspection time.
4. The 'Buyer Feedback' window will open in the right panel.



5. Search for the contact and select their name from the drop down.



6. To add a new contact, type their name in the contact search and select 'Add new contact' from the results. You can quickly enter their basic contact details and subscribe them to receive both standard e-newsletters and property alerts.

Inspection Feedback

Add Feedback
(1) Other Feedback

1 Jones Street, Copacabana
07/12/2011 10:00am - 10:30am

First Name:

Last Name:

Email:

Mobile No.:

Home No.:

Work No.:

Suburb:

Subscribe?

Price Feedback \$:

Contract Taken

Comments:

Save & Add Another
Save & View Contact

**Note: By subscribing a contact to receive E-Newsletters you acknowledge you have received explicit permission from the person to receive marketing material from your office.*

Warning!

**By ticking this checkbox you
acknowledge you have received
explicit permission from the person
to receive marketing material from
this office**

7. Enter the feedback, interest level (hot, warm, cold), price feedback and whether or not they took a copy of the contract.



Inspection Feedback

Add Feedback (1) Other Feedback

1 Jones Street, Copacabana
07/12/2011 10:00am - 10:30am

First Name:

Last Name:

Email:

Mobile No.:

Home No.:

Work No.:

Suburb:

Subscribe?

Price Feedback \$:

Contract Taken

Comments:

Save & Add Another **Save & View Contact**

8. Click on Save & Add another or Save & View Contact to complete the Contact Card or edit the contact requirements if applicable

**Note: The Contact will be added as a buyer if inspecting a for sale property otherwise as a tenant with requirements matching the property they inspected.*

Contact Inspection Viewers

How do I view all feedback for a property? (This includes all feedback from both open homes and appointment inspections).

1. [Search for your Property](#) and open the [Property Card](#)

2. On the left panel click the Inspection & Feedback tab (If the matching left panel is not visible, click Full View in the top right hand corner of the Property Card).

Listing - ID#1P0001

< Close

- > Notes History
- > Recent Enquiries
- > Property History
- Inspections (4) & Feedback (3)

Date	Period	Add By Appointment	Feedback
07/12/2011	10:00 AM - 10:30 AM		Feedback
10/11/2011	09:00 AM - 10:00 AM		Feedback
07/11/2011	10:00 AM - 10:30 AM		Feedback
05/11/2011	10:00 AM - 10:30 AM		Feedback


All Viewers Feedback Report

- > Activity Schedules
- > Offers Made(1)
- > Contracts Requested(1)
- > Property Modifications Log
- > Links to Portals
- > Help Text

:: Listing : ID#1P0001 - 1 Jones Street, Copacabana

Full View

General For Sale Features OFI Agents & Contacts Resources Commission

Status: Available [Copy This Property](#) 

For Sale/Lease: For Sale [Vendor Preview Link](#)

Type: * Residential

Category: * House

Investment?:

Sale Method: Private Treaty

Authority: Exclusive

Property Name:

Level No.: Unit No.: Street No.: 1

Street Name: * Jones Street Type: Street

Suburb: * COPACABANA (2251) State: * NSW

Hide Address?: Tick to hide the address on your web site.
 Tick to edit address for your web display format.

Address Format: 1 Jones Street

Google Map: [Re-Position Marker](#) Hide Street View Hide "What's around"

Key to Property?:

Access Details:

Export to Portals:

Save

3. Click the green Viewers button.

:: Viewers : 1 Jones Street, Copacabana (3 contacts found)

Sort By: Contact Last Name L to H --Filter 1-- --Filter 2-- --Filter 3-- [reset filter](#)

Contact	Contact Info	Inspection Date	Type	Interest	Contract Taken	Price Feedback	Follow Up	Comments	
Samantha Jones		10-Nov-11	Appt	Hot	No	\$1,100,000	<input type="checkbox"/>	Loved the property, would like to inspect again with husband.	edit
John O'Reilly		07-Dec-11	OFI	Warm	No	\$1,200,000	<input type="checkbox"/>	Thought it was a fantastic property but not sure it was suitable for him.	edit
Mary Smith		07-Nov-11	Appt	Hot	No	\$1,150,000	<input type="checkbox"/>	Mary wanted a second look at the house with her husband after the open house on the 5th. They really love the property however need to check finances.	edit

4. You can edit feedback by clicking [Edit] next to the comments, you can sort and filter viewers of the property by name, date, inspection type, price feedback, interest levels and follow up flag.

The screenshot shows a web application interface. On the left, a table titled "Viewers : 1 Jones Street, Copacabana (3 contacts found)" displays the following data:

Contact	Contact Info	Inspection Date	Type	Interest	Contract Taken	Price Feedback	Follow Up	Comments	
Samantha Jones		10-Nov-11	Appt	Hot	No	\$1,100,000	<input type="checkbox"/>	Loved the property, would like to inspect again with husband.	edit
John O'Reilly		07-Dec-11	OFl	Warm	No	\$1,200,000	<input type="checkbox"/>	Thought it was a fantastic property but not sure it was suitable for him.	edit
Mary Smith		07-Nov-11	Appt	Hot	No	\$1,150,000	<input type="checkbox"/>	Mary wanted a second look at the house with her husband after the open house on the 5th. They really love the property however need to check finances.	edit


On the right, the "Inspection Feedback" panel shows details for "1 Jones Street, Copacabana" (10/11/2011 09:00am - 10:00am). It includes a "Contact" field with "Samantha Jones", a "Price Feedback \$" field with "1100000", a "Contract Taken" dropdown with "Hot", and a "Comments" field with the text "Loved the property, would like to inspect again with husband." At the bottom of the panel are two buttons: "Save & Add Another" and "Save & View Contact".

5. Once finished, close the panel using the red cross.

How do I communicate to a list of inspection viewers?

1. Click on the green Viewers button under the Inspection Feedback & Feedback tab

This screenshot is identical to the one above, showing the "Viewers" table and the "Inspection Feedback" panel. The focus is on the action icons in the top right corner of the table, which include a printer icon, a globe icon, a calculator icon, a document icon with an 'e', and a printer icon.

2. Using the action icons  you can print the list of viewers with their comments or their contact details, download a CSV file with viewer details, SMS all viewers, send all viewers an E-Newsletter and also print a contact report.


Vendor Report

How do I Create a Vendor Report in Agentbox?

1. [Search for your Property](#) and open the [Property Card](#)

2. Click on 'Inspection & Feedback' on the left property card panel

**Note - if you can't see the matching left property panel, click 'Full View' on the top right hand corner of the property card.*

 Listing - ID#1P0001

< Close

> Notes History

> Recent Enquiries

> Property History

∨ Inspections (4) & Feedback (3)

Date	Period	Add By Appointment
07/12/2011	10:00 AM - 10:30 AM	Feedback
10/11/2011	09:00 AM - 10:00 AM	Feedback
07/11/2011	10:00 AM - 10:30 AM	Feedback
05/11/2011	10:00 AM - 10:30 AM	Feedback

[All Viewers](#) [Feedback Report](#)

> Activity Schedules

> Offers Made(1)

> Contracts Requested(1)

> Property Modifications Log

> Links to Portals

> Help Text


2. Click on the green 'Feedback Report' button

3. Your Vendor Report will appear on screen

Create Vendor Report

Step 1 of 2 - Edit your report [View Previous Reports](#)

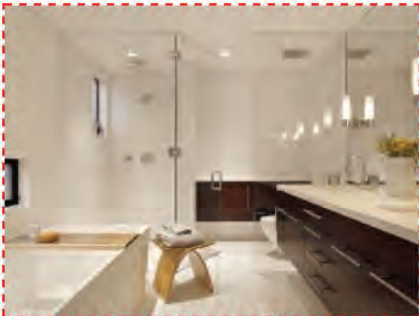
Edit Details | Print or Send

 Vendor Report by: Your Agent

4 Cornwallis Street, Eveleigh NSW - office@agentbox.com.au




Monday, 5th December 2011

Your Property



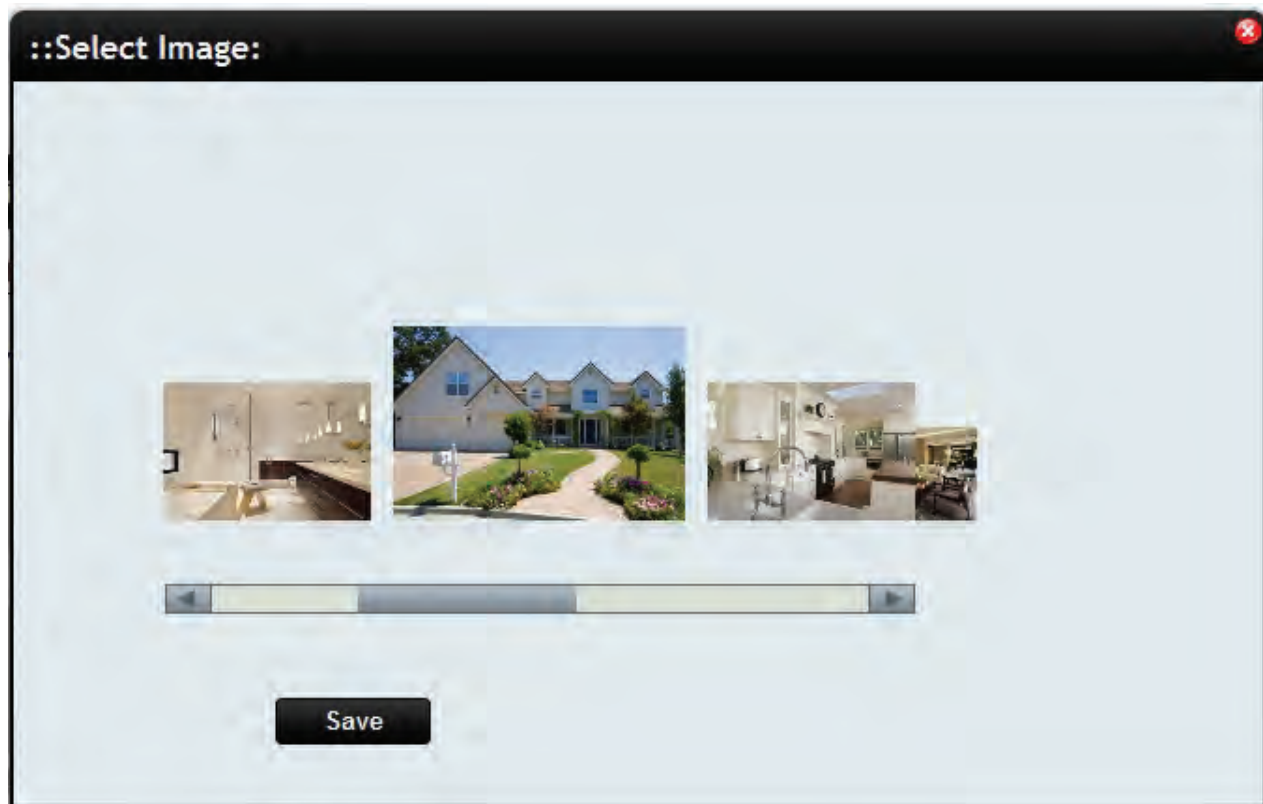
654 Victoria Street, Sydney
Large Family Home

Statistics



[Preview](#) [Save & Proceed »](#)

4. Click on the photo to select a different image



5. Click on the Feedback Statistics area to add/edit statistics, refine the display details and add comments

Create Vendor Report

Step 1 of 2 - Edit your report View Previous Reports

Edit Details Print or Send


AGENTBOX™

4 Cornwallis Street, Eveleigh NSW

Thursday, 5th April 2012

Campaign Overview

Your Property



Statistics (total campaign)

:: Edit this Section: Vendor Report

:: Overview ::

Headline:

Comments:

Title:

Open Homes:

Viewed by Appointment:

Enquiries:

Days on Market:

Advertised Price:

Internet Statistics:

Marketing:

Contracts Issued:

Offers:

:: Details Display ::

Period From:

Period To:

* Display the whole campaign rather than the date period.

Contact Display:

Contact Sort By:

Do not show 'Inspection Feedback' section.

-- Do not show 'Total Interest Levels' section.

-- Do not show 'Interest Levels By Date' section.

7. Buyer Feedback, Logged Enquiries, Offers Made and Contract Requests will be displayed in the report - This can be edited in the [Viewers](#) section of [Buyer Feedback](#).

**Note: your vendor report may have a different layout.*

8. 'Preview' or 'Save and Proceed' to Print or Send via Email

Create Vendor Report

Step 2 of 2 - Send / Print your report [View Previous Reports](#)

[Edit Details](#) **Print or Send**

Print PDF

Add Recipient: [Add](#)

Delivery To: Samantha Jones

Reply From:

Subject: *

Message: *

B I U Paragraph

Print PDF

[« Previous Step](#) [Save](#) [Send Now](#)

9. Click Save, to store a copy against the property which can be viewed under the green View Previous Reports button at the top right hand corner of the panel.

:: Listing : #1P0008 - Sydney : Previous Vendor Reports [Create New Vendor Report](#)

Date	From	Subject			
05/12/11 01:40 pm	John Smith		View	Print	Edit

Log an Offer

How do I enter an Offer into Agentbox?

1. [Search for your Property](#) and open the [Property Card](#)

Listing - ID#1P0001

- < Back to Properties
- > Notes History
- > Recent Enquiries
- > Property History
- > Inspections (4) & Feedback (3)
- > Activity Schedules
- > Offers Made(1)
- > Contracts Requested(1)
- > Property Modifications Log
- > Links to Portals
- > Help Text

:: Listing : ID#1P0001 - 1 Jones Street, Copacabana

Full View

General For Sale Features OFI Agents & Contacts Resources Commission

Status: Available Copy This Property

For Sale/Lease: For Sale Vendor Preview Link

Type: * Residential

Category: * House

Investment?:

Sale Method: Private Treaty

Authority: Exclusive

Property Name:

Level No.: Unit No.: Street No.: 1

Street Name: * Jones Street Type: Street

Suburb: * COPACABANA (2251) State: * NSW

Hide Address?: Tick to hide the address on your web site.
 Tick to edit address for your web display format.

Address Format: 1 Jones Street

Google Map: Re-Position Marker Hide Street View Hide "What's around"


Key to Property?:

Access Details:

Export to Portals:

Save

2. Click on the Offers Made tab on the Left Panel

 Listing - ID#1P0001

[← Back to Properties](#)

- [› Notes History](#)
- [› Recent Enquiries](#)
- [› Property History](#)
- [› Inspections \(4\) & Feedback \(3\)](#)
- [› Activity Schedules](#)
- [▼ Offers Made\(1\)](#)

Date	Offer	Add
No Offer have been made at this time.		

- [› Contracts Requested\(1\)](#)
- [› Property Modifications Log](#)
- [› Links to Portals](#)
- [› Help Text](#)

3. Click on Add

Make an Offer

Buyer: *

Offer \$: *

Offer Date:

Comments:

Email to Vendor?:

Print Letter?:

4. Enter Buyer Name, Offer, Comments, Offer Date

Make an Offer

Buyer: *

Offer \$: *

Offer Date:

Comments:

Email to Vendor?:

Print Letter?:

Send From:

5. Select if you would like to email offer to client or generate a letter (If printing a letter you can select who to send it from).

**Note: The letter template text will be emailed to the vendor. To customise this please contact Agentbox Support at support@agentbox.com.au*

6. Click Save

How Do I View Offers Made to my Property?

1. [Search for your Property](#) and open the [Property Card](#)

Listing - ID#1P0001

< Back to Properties

- > Notes History
- > Recent Enquiries
- > Property History
- > Inspections (4) & Feedback (3)
- > Activity Schedules
- > Offers Made(1)
- > Contracts Requested(1)
- > Property Modifications Log
- > Links to Portals
- > Help Text

:: Listing : ID#1P0001 - 1 Jones Street, Copacabana

Full View

General For Sale Features OFI Agents & Contacts Resources Commission

Status: Available

For Sale/Lease: For Sale

Type: * Residential

Category: * House

Investment?:

Sale Method: Private Treaty

Authority: Exclusive

Property Name:

Level No.: Unit No.: Street No.: 1

Street Name: * Jones Street Type: Street

Suburb: * COPACABANA (2251) State: * NSW

Hide Address?: Tick to hide the address on your web site.
 Tick to edit address for your web display format.

Address Format: 1 Jones. Street

Google Map: [Re-Position Marker](#) Hide Street View Hide "What's around"

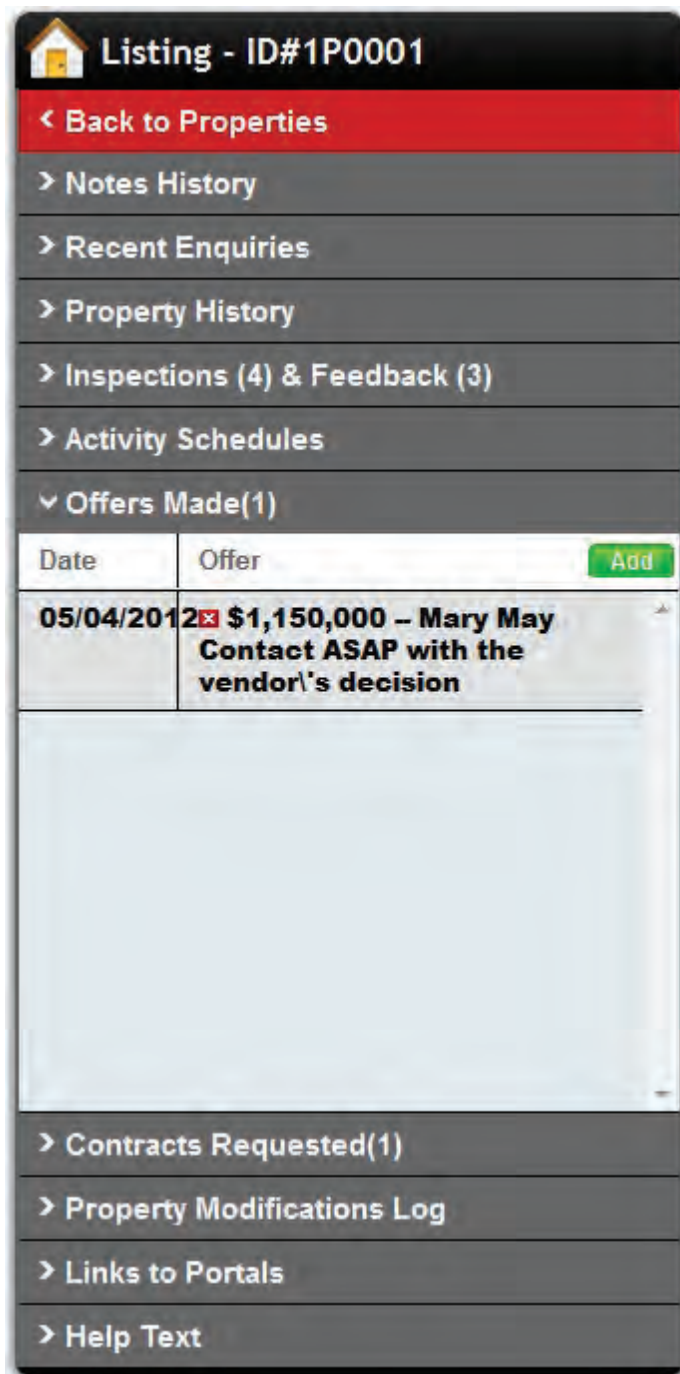
Key to Property?:

Access Details:

Export to Portals:

Save

2. Click on the Offers Made tab on the Left Panel



Log a Contract Request

How do I log a contract request into Agentbox?

1. [Search for your Property](#) and open the [Property Card](#)

Listing - ID#1P0001

< Back to Properties

- > Notes History
- > Recent Enquiries
- > Property History
- > Inspections (4) & Feedback (3)
- > Activity Schedules
- > Offers Made(1)
- > Contracts Requested(1)
- > Property Modifications Log
- > Links to Portals
- > Help Text

:: Listing : ID#1P0001 - 1 Jones Street, Copacabana

Full View

General
For Sale
Features
OFI
Agents & Contacts
Resources
Commission

Status: Copy This Property

For Sale/Lease: Vendor Preview Link

Type: *

Category: *

Investment?:

Sale Method:

Authority:

Property Name:

Level No.: Unit No.: Street No.:

Street Name: * Street Type:

Suburb: * State: *

Hide Address?: Tick to hide the address on your web site.
 Tick to edit address for your web display format.

Address Format:

Google Map: Re-Position Marker Hide Street View Hide "What's around"


Key to Property?:

Access Details.:

Export to Portals:

Save

2. Click on Contracts Requested tab on the Left Panel


 Listing - ID#1P0001

- < Back to Properties
- > Notes History
- > Recent Enquiries
- > Property History
- > Buyer Feedback & Vendor Report(1)
- > Offers Made
- ∨ Contracts Requested

Date	Contact	<input type="button" value="Add"/>
No request have been made at this time.		

- > Property Modifications Log
- > Links to Portals
- > Help Text

3. Click on Add

Make a Contract Request 

Buyer: *

Comments:

4. Enter Buyer Name and Comments

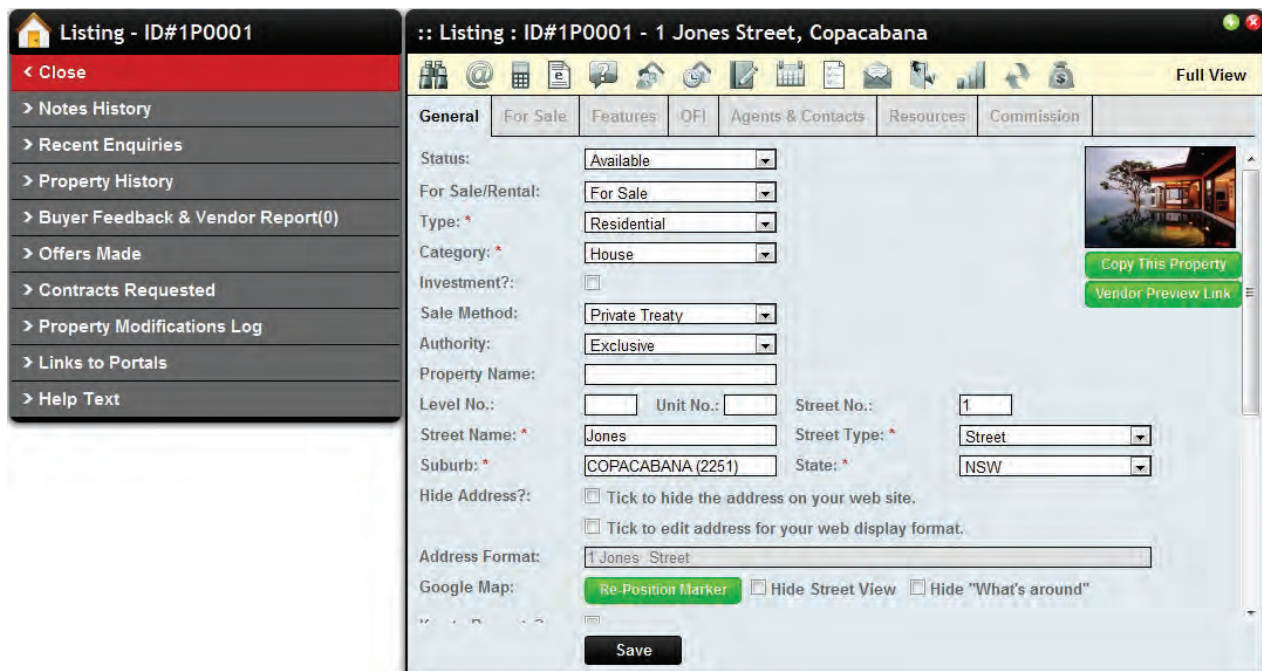


The screenshot shows a dialog box titled "Make a Contract Request". It has a dark header with a close button (X) in the top right corner. The main area is light blue and contains two text input fields. The first field is labeled "Buyer: *" and contains the text "Mary May". The second field is labeled "Comments:" and contains the text "Has a meeting on Friday with solicitor. Discussing finances with husband and will contact us ASAP.". Below the input fields is a dark button labeled "Save".

5. Click on Save, this will log a copy of this request against the property and also create a task for the listing agent.


How Do I View Contract Requests?

1. [Search for your Property](#) and open the [Property Card](#)



The screenshot shows a web application interface for a property listing. On the left is a dark sidebar with a home icon and the text "Listing - ID#1P0001". Below this is a list of menu items: "< Close", "> Notes History", "> Recent Enquiries", "> Property History", "> Buyer Feedback & Vendor Report(0)", "> Offers Made", "> Contracts Requested", "> Property Modifications Log", "> Links to Portals", and "> Help Text". The main area is titled "Listing : ID#1P0001 - 1 Jones Street, Copacabana" and has a "Full View" button in the top right. Below the title is a toolbar with various icons. The main content area is divided into tabs: "General", "For Sale", "Features", "OFI", "Agents & Contacts", "Resources", and "Commission". The "General" tab is active and shows various fields: "Status:" (Available), "For Sale/Rental:" (For Sale), "Type: *" (Residential), "Category: *" (House), "Investment?:" (checkbox), "Sale Method:" (Private Treaty), "Authority:" (Exclusive), "Property Name:", "Level No.:" (input), "Unit No.:" (input), "Street No.:" (1), "Street Name: *" (Jones), "Street Type: *" (Street), "Suburb: *" (COPACABANA (2251)), "State: *" (NSW), "Hide Address?:" (checkboxes for "Tick to hide the address on your web site." and "Tick to edit address for your web display format."), "Address Format:" (Jones Street), and "Google Map:" (Re-Position Marker, Hide Street View, Hide "What's around"). There is a "Save" button at the bottom.

2. Click on the Contracts Requested tab on the Left Panel

 Listing - ID#1P0001

- [← Back to Properties](#)
- [> Notes History](#)
- [> Recent Enquiries](#)
- [> Property History](#)
- [> Buyer Feedback & Vendor Report\(1\)](#)
- [> Offers Made](#)
- [∨ Contracts Requested](#)

Date	Contact	Add
24/11/2011	May, Mary	↕

- [> Property Modifications Log](#)
- [> Links to Portals](#)
- [> Help Text](#)

View Property Modifications

View Property Modifications

1. [Search for your Property](#) and open the [Property Card](#)

Listing - ID#1P0001

< Back to Properties

- > Notes History
- > Recent Enquiries
- > Property History
- > Inspections (4) & Feedback (3)
- > Activity Schedules
- > Offers Made(1)
- > Contracts Requested(1)
- > Property Modifications Log
- > Links to Portals
- > Help Text

:: Listing : ID#1P0001 - 1 Jones Street, Copacabana

Full View

General
For Sale
Features
OFI
Agents & Contacts
Resources
Commission

Status: Copy This Property

For Sale/Lease: Vendor Preview Link

Type: *

Category: *

Investment?:

Sale Method:

Authority:

Property Name:

Level No.: Unit No.: Street No.:

Street Name: * Street Type:

Suburb: * State: *

Hide Address?: Tick to hide the address on your web site.
 Tick to edit address for your web display format.

Address Format:

Google Map: Re-Position Marker Hide Street View Hide "What's around"


Key to Property?:

Access Details.:

Export to Portals:

Save

2. Click on the Property Modification Log tab on the Left Property Panel (If the matching left panel is not visible, click Full View in the top right hand corner of the property card).

 Listing - ID#1P0001

< Close

> Notes History

> Recent Enquiries

> Property History

> Buyer Feedback & Vendor Report(1)

> Offers Made(1)

> Contracts Requested(1)

∨ Property Modifications Log

Filter Modifications By:

- 19/08/11 10:51AM - John Smith
Listing Status : Offline => Available => Property ready for marketing
- 19/08/11 10:48AM - John Smith
Add/Remove Agents : Added John Smith(Listing Agent)
- 19/08/11 10:48AM - John Smith
Listing Features : Added Air Conditioning, Alarm System, Area Views, Ensuite, Heating, Lift Installed, Ocean Views, Open Fire Place, Pool, Prestige Homes, Water Front, Water Views
- 19/08/11 10:42AM - John Smith
Listing Search Price : 0 => 1250000

> Links to Portals

> Help Text

3. You can refine the changes using the drop down menu e.g. Export to Portals

Conduct CMA

Conduct a Comparative Market Analysis (CMA)

1. [Search for your Property](#) and open the [Property Card](#)

Listing - ID#1P0001

< Back to Properties

- > Notes History
- > Recent Enquiries
- > Property History
- > Inspections (4) & Feedback (3)
- > Activity Schedules
- > Offers Made(1)
- > Contracts Requested(1)
- > Property Modifications Log
- > Links to Portals
- > Help Text

:: Listing : ID#1P0001 - 1 Jones Street, Copacabana

Full View

General
For Sale
Features
OFI
Agents & Contacts
Resources
Commission

Status: Available Copy This Property

For Sale/Lease: For Sale Vendor Preview Link

Type: * Residential

Category: * House

Investment?:

Sale Method: Private Treaty

Authority: Exclusive

Property Name:

Level No.: Unit No.: Street No.: 1

Street Name: * Jones Street Type: Street

Suburb: * COPACABANA (2251) State: * NSW

Hide Address?: Tick to hide the address on your web site.
 Tick to edit address for your web display format.

Address Format: 1 Jones Street

Google Map: Re-Position Marker Hide Street View Hide "What's around"

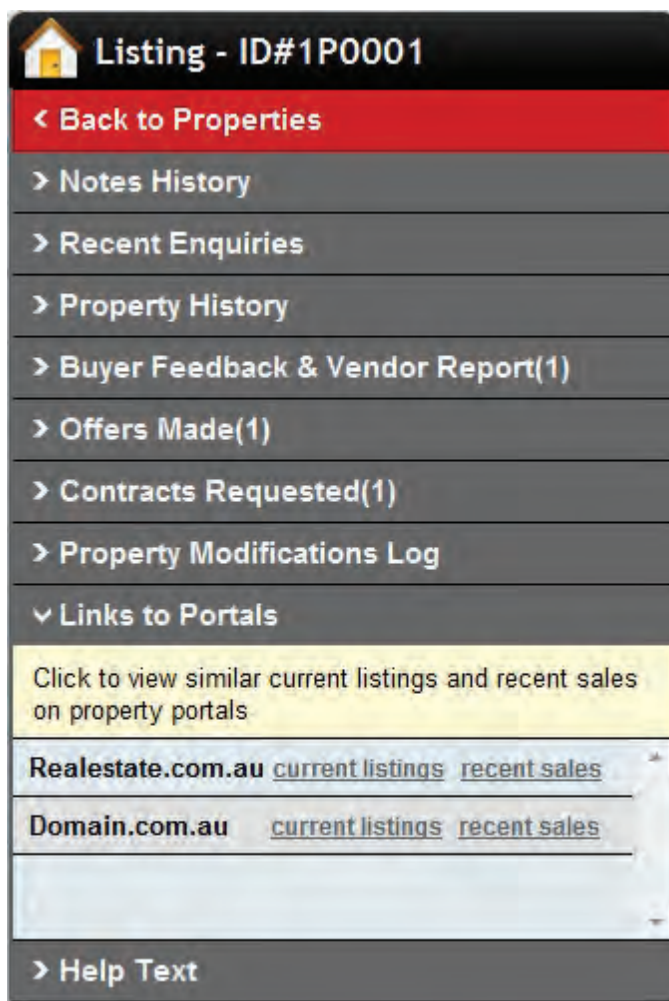
Key to Property?:

Access Details.:

Export to Portals:

Save

2. Click on Links to Portals on the Left Property Panel (If the matching left panel is not visible, click Full View in the top right hand corner of the property card).



3. Click on the page you would like to open, e.g. recent sales on realestate.com.au and this will open in a new browser tab or window. It will conduct a search through the portal based on the suburb and search price of the property or appraisal price if appraisal and prospecting price if prospect.

4. Close the browser tab, or window to return to Agentbox.

Commission

How do I log commissions in Agentbox

The commissions template in Agentbox is customisable to tailor to your commission needs. We have outlined two scenarios below to demonstrate how you can change the template to get the results you need.

Scenario 1.

This method is used if the commission is calculated per agent based on a fixed % split of earnings with the office.

E.g. John gets 50% of all sales and the office gets 50% *or*

John listed a property however Melanie was the selling agent so John is entitled to 70% of the Gross commission for listing the property. Of that 70% he receives 50% and the office receives 50%

1. [Search for your Property](#) and open the [Property Card](#) and select the commissions tab.
2. Ensure the Agents percentage split with the office is set up in their [staff card](#) in this example 50%

Role: *
Agent Split %:

3. Ensure the Listing Agent, Selling Agent and any referral Agents are added to the [Agents and Contacts](#) tab on the property card.

The screenshot shows a window titled ":: Listing : #1P0008 - 654 Victoria Street, Sydney". The window has a toolbar with various icons and a "Full View" button. Below the toolbar is a tabbed interface with tabs for "General", "For Sale", "Features", "OFI", "Agents & Contacts", "Resources", and "Commission". The "Agents & Contacts" tab is active. The main content area is titled ":: Assign related Agents ::" and contains the following fields:

- Role: (unchecked to de-select)
- Agent:
- Selected Agents: John Smith (Listing Agent)
 Melanie Thompson (Selling Agent)
- Appear on Site: John Smith (Listing Agent)
 Melanie Thompson (Selling Agent)

A "Save" button is located at the bottom left of the window.

4. Ensure all the property sale details e.g. Sale price and commission fee or % have been added to the [property status](#).

Warning!

Change Status to Exchanged?

Exchanged Date: 05 12 2011

Unconditional / Conditional

Expected Settlement: 16 01 2012

Sold Price (\$):* 1000000

Display Price: \$1,000,000

Commission:* 2 % Flat Fee \$

Deposit:* 10 % Flat Fee \$

Export to Portal:

Yes No

5. Click on the Commission Tab on the property card.

:: Commission : #1P0008 - 654 Victoria Street, Sydney

Full View

General For Sale Features OFI Agents & Contacts Resources **Commission**

Step 1 of 2 - Setup Commission Deduction Splits

Select Template:

Is this a staged settlement?

:: Standard Commission Split Template ::

Please specify the order on how the deductions are calculated from the Gross Commission. To change the deduction ordering simply grab an item below, drag and drop it into the order of your preference. Please Note you can add additional deductions by clicking the Add Commission Fee button below.

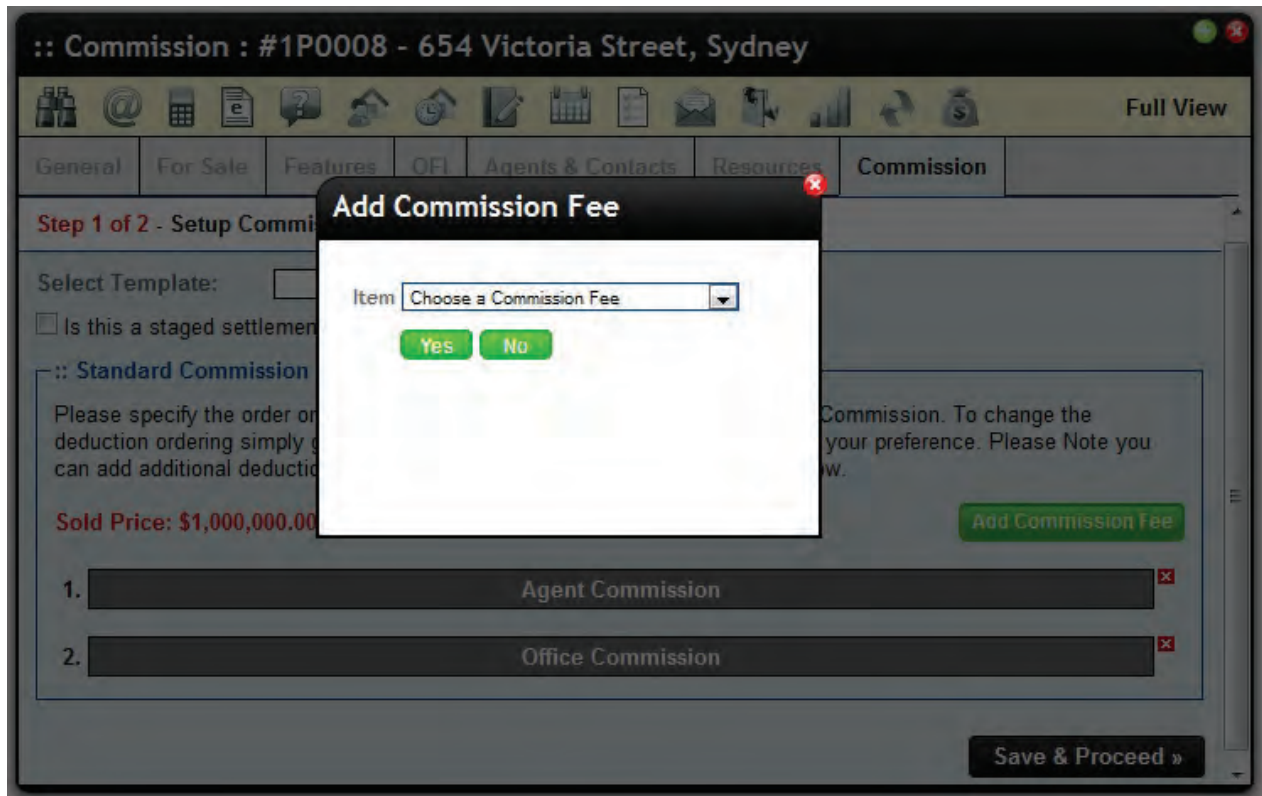
Sold Price: \$1,000,000.00 - Gross Commission 2%

1.

2.

6. To add in another fee e.g. advertising fee, referral fee etc. (Not used in this example)

- Click the green Add Commission Fee button
- Select Advertising Fee from the drop down menu
- Click Yes to insert
-



7. Re-order the fees by dragging and dropping into the required order. In this example we are not adding any additional fees so leave in the normal order.
- 1. Agent Commission
 - 2. Office Commission

:: Commission : #1P0008 - 654 Victoria Street, Sydney

Full View

General For Sale Features OFI Agents & Contacts Resources **Commission**

Step 1 of 2 - Setup Commission Deduction Splits

Select Template:

Is this a staged settlement?

:: Standard Commission Split Template ::

Please specify the order on how the deductions are calculated from the Gross Commission. To change the deduction ordering simply grab an item below, drag and drop it into the order of your preference. Please Note you can add additional deductions by clicking the Add Commission Fee button below.

Sold Price: \$1,000,000.00 - Gross Commission 2% **Add Commission Fee**

1.
2.
3.

Save & Proceed »

8. Click Save and Proceed to enter the Agent Commission.

:: Commission : #1P0008 - 654 Victoria Street, Sydney

Full View

General For Sale Features OFI Agents & Contacts Resources **Commission**

Step 2 of 2 - Specify Commission Split Details

Gross commission (based on 2% of \$1,000,000.00) = \$20,000.00

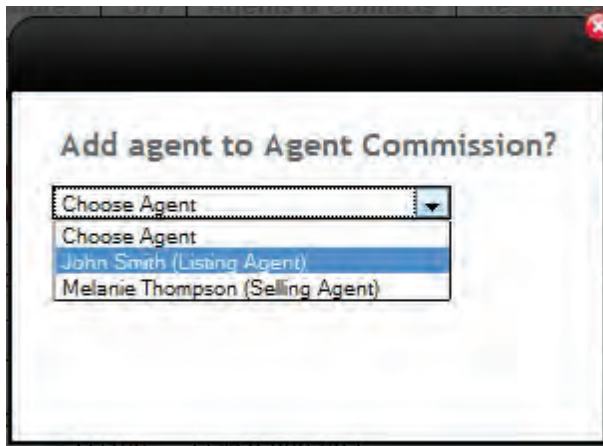
Item	% or \$Fee	Value	Amount	Recipient
1. Agent Commission	<input type="text" value="%"/>	<input type="text" value="100"/>	\$20,000.00	Deduction Add Agent
Commission Balance = \$0.00				
2. Office Commission	<input type="text" value="%"/>	<input type="text" value="100"/>	\$0.00	Your Agency

Print Commission

« Previous Step **Finish**

1. Agent Commission -

- Select % from the drop down, and then enter **100%**. The gross commission balance will be divided between the agents.
- Add in the Listing Agent and the Selling Agent by clicking the green Add Agent button.



- Enter the percentage each agent receives for their part of the sale in the listing splits column (first column) In this example 70% for listing and 30% for selling.
 - In the third column you will notice the agents split with the office appears. This is the fee you have set up in their staff card. So in this example John received 70% of the Gross commission for listing the property, but of that 50% goes to him and the remaining 50% goes back to the office balance.
2. **Office Commission** - By default will be 100% of the balance.

:: Commission : #1P0008 - 654 Victoria Street, Sydney

Full View

General For Sale Features OFI Agents & Contacts Resources **Commission**

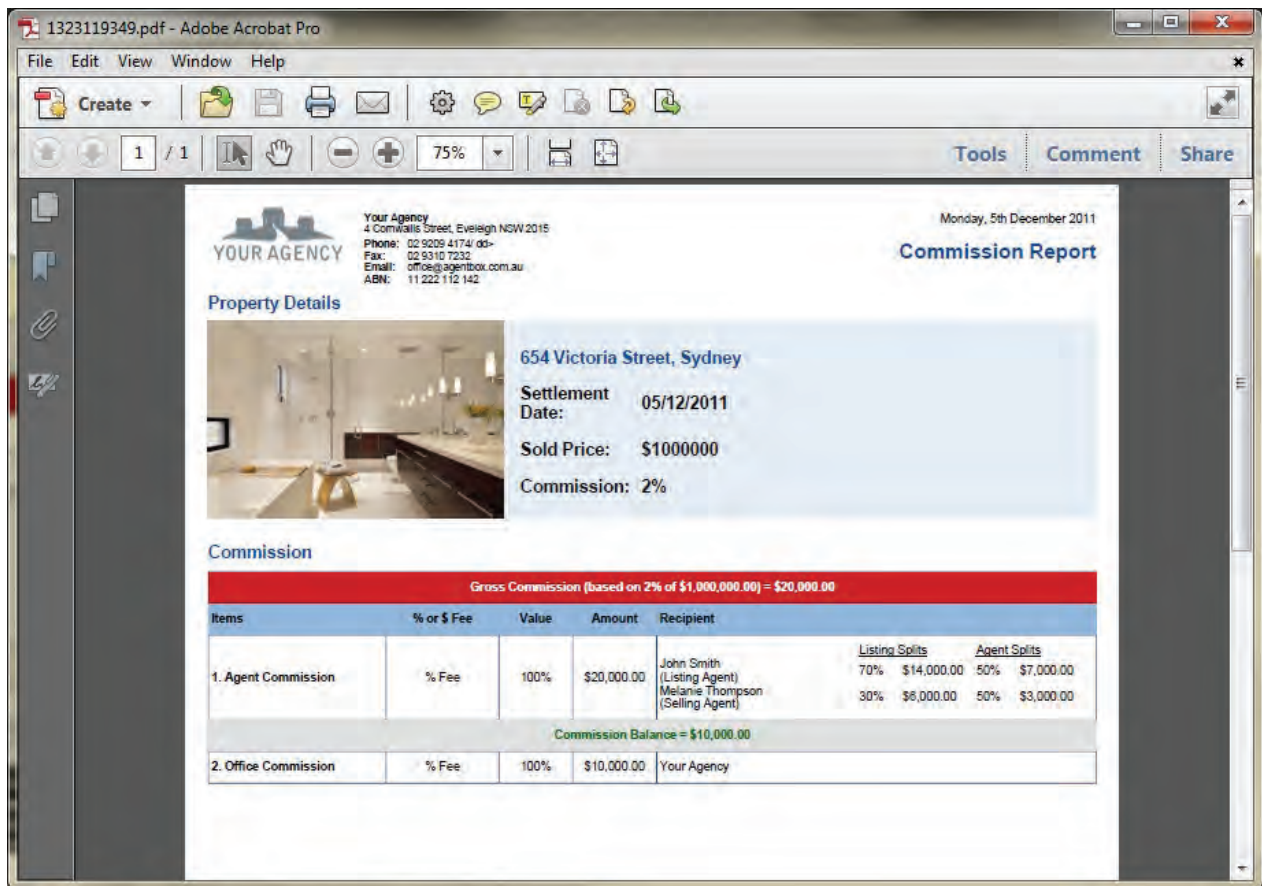
Gross commission (based on 2% of \$1,000,000.00) = \$20,000.00

Item	% or \$Fee	Value	Amount	Recipient									
1. Agent Commission	%	100	\$20,000.00	<table border="0"> <tr> <td></td> <td><u>Listing Splits</u></td> <td><u>Agent Splits</u></td> </tr> <tr> <td>John Smith (Listing Agent)</td> <td>70% \$14,000.00</td> <td>50% \$7,000.00</td> </tr> <tr> <td>Melanie Thompson (Selling Agent)</td> <td>30% \$6,000.00</td> <td>50% \$3,000.00</td> </tr> </table>		<u>Listing Splits</u>	<u>Agent Splits</u>	John Smith (Listing Agent)	70% \$14,000.00	50% \$7,000.00	Melanie Thompson (Selling Agent)	30% \$6,000.00	50% \$3,000.00
		<u>Listing Splits</u>	<u>Agent Splits</u>										
	John Smith (Listing Agent)	70% \$14,000.00	50% \$7,000.00										
Melanie Thompson (Selling Agent)	30% \$6,000.00	50% \$3,000.00											
<input type="button" value="Deduction"/> <input type="button" value="Add Agent"/>													
Commission Balance = \$10,000.00													
2. Office Commission	%	100	\$10,000.00	Your Agency									

Print Commission

« Previous Step Finish

9. Click Finish to complete and Print Commission to print a report for the agent/s.



Scenario 2.

The office always takes a flat fee or fixed % of every sale, the remaining commission is then split up between the Listing and Selling Agent using a percentage split.

1. [Search for your Property](#) and open the [Property Card](#) and select the commissions tab.
2. Ensure the Agents percentage split in their staff card is **100%** in their [staff card](#).

Role: *

Agent Split %:

3. Ensure the Listing Agent, Selling Agent and any Referral Agents are added to [Agents and Contacts](#) tab on the property card.

:: Listing : #1P0008 - 654 Victoria Street, Sydney

Full View

General For Sale Features OFI **Agents & Contacts** Resources Commission

Assign related Agents ::

Role: (uncheck to de-select)

Agent:

Selected Agents:

- John Smith (Listing Agent)
- Melanie Thompson (Selling Agent)

Appear on Site:

- John Smith (Listing Agent)
- Melanie Thompson (Selling Agent)

4. Ensure all the property sale details e.g. Sale price and commission fee or % have been added to the [property status](#)

Warning!

Change Status to Exchanged?

Exchanged Date:

Unconditional / Conditional

Expected Settlement:

Sold Price (\$):*

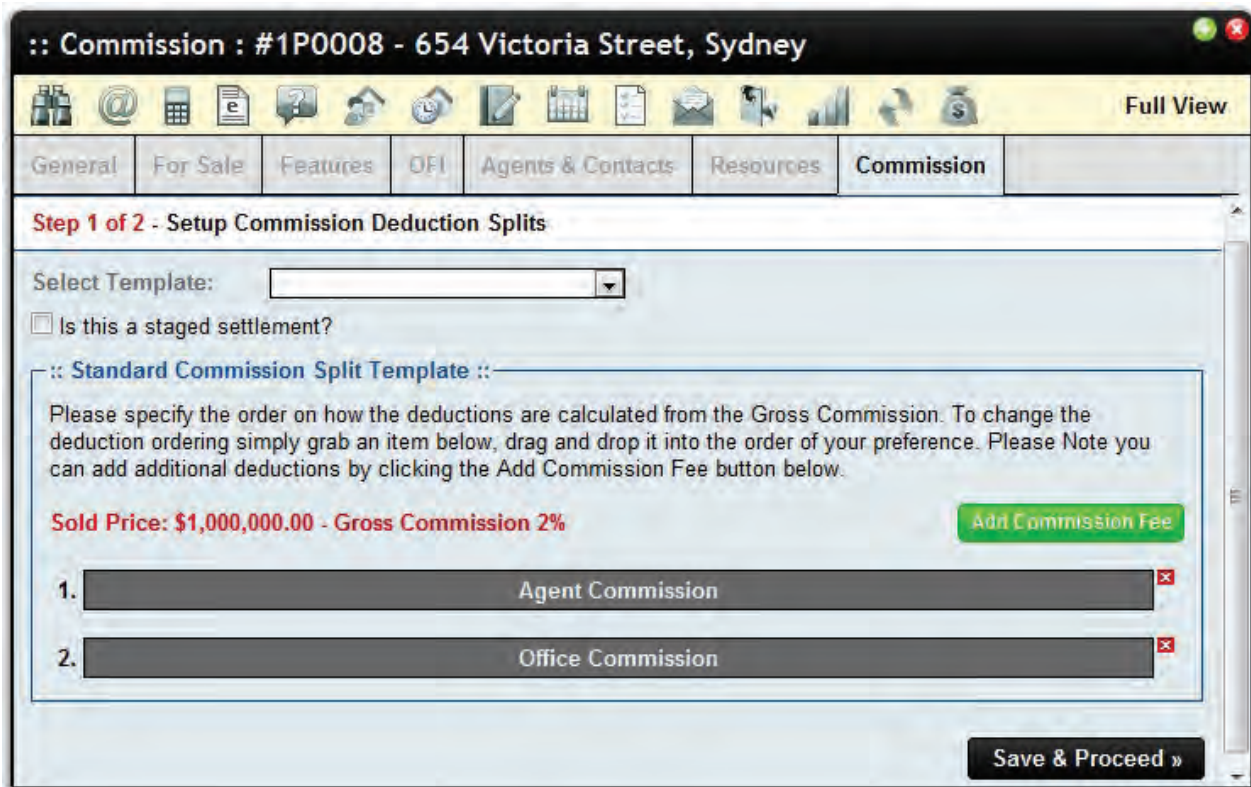
Display Price:

Commission:* % Flat Fee \$

Deposit:* % Flat Fee \$

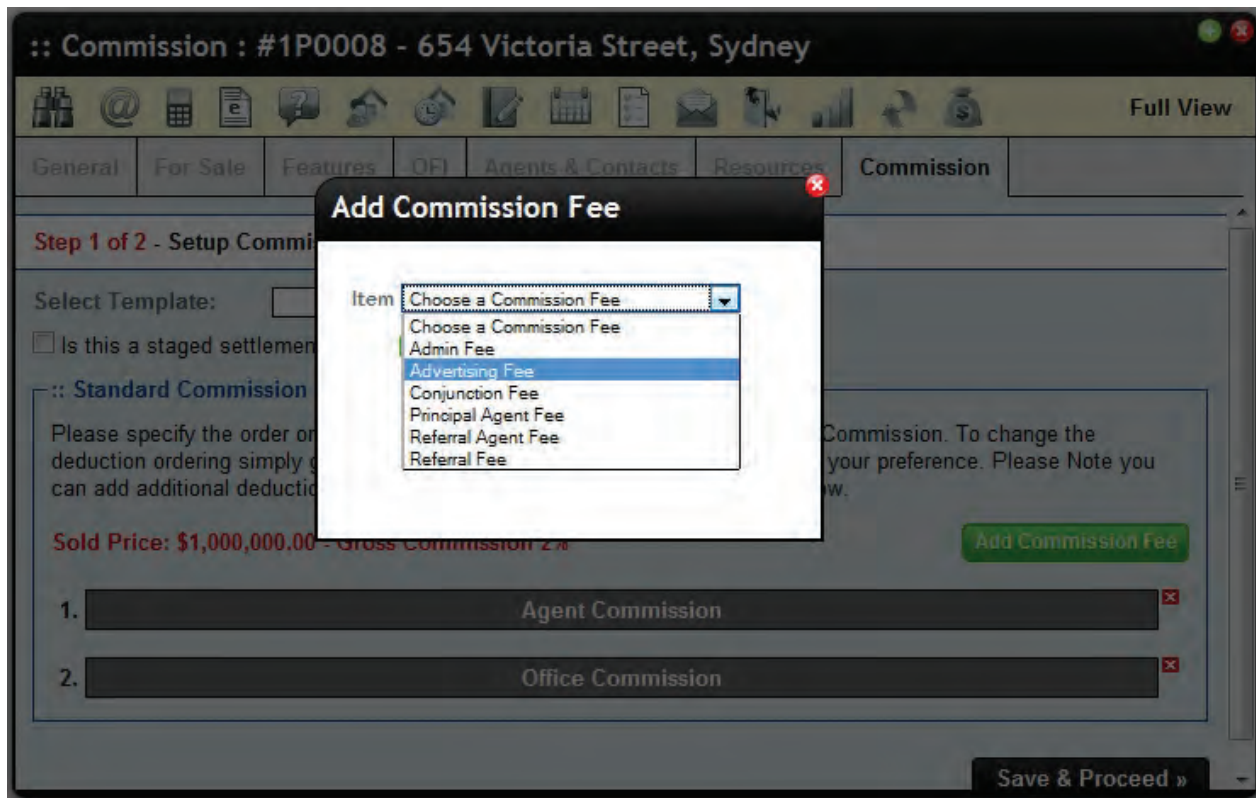
Export to Portal:

5. Click on the Commission Tab



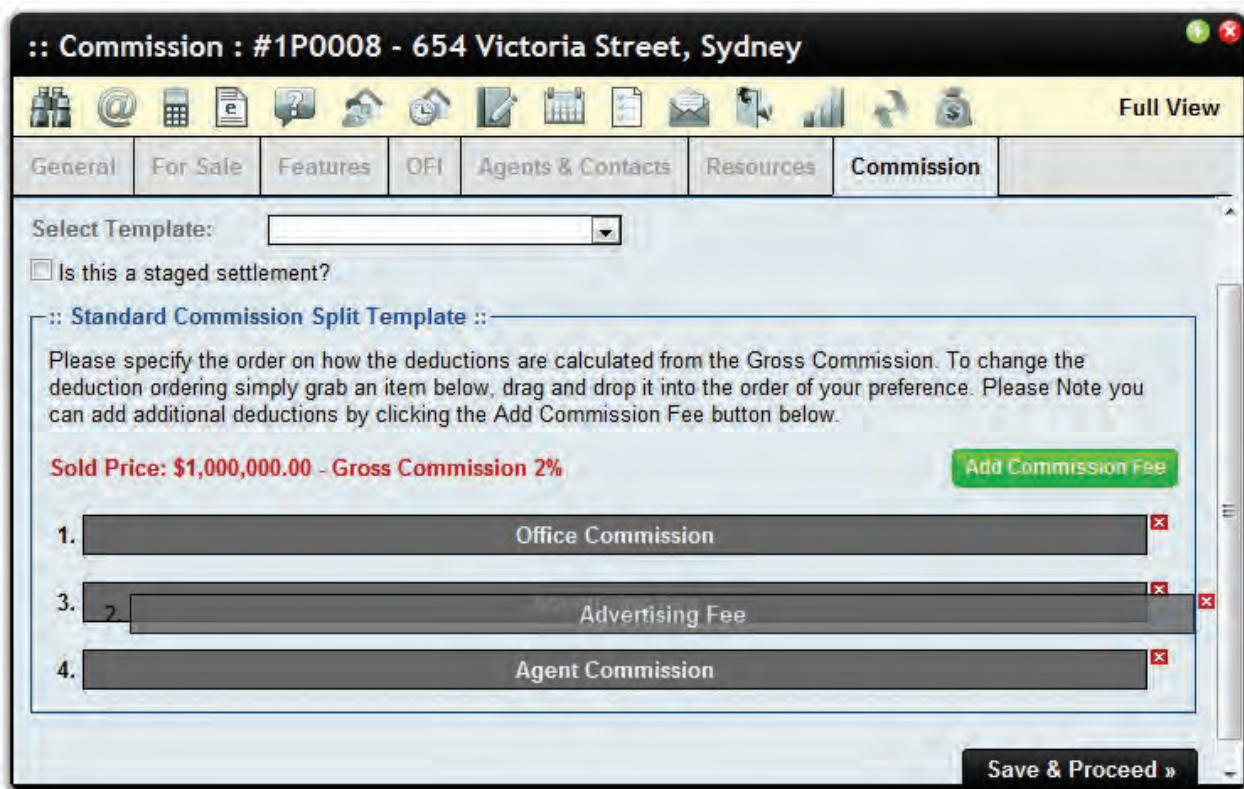
6. To add in an additional fee, in this example an advertising fee

- Click the green Add Commission Fee button
- Select Advertising Fee from the drop down menu
- Click Yes to insert



7. Re-order the fees by dragging and dropping into the required order. In this example we move to the following order;

- 1. Office
- 2. Advertising Fee
- 3. Agent Commission



8. Click Save and Proceed to enter the Agent Commission.

- 1. Office Commission - Select \$ Fee from the drop down, then enter the amount the office receives. In this example \$1500.00
- 2. Advertising Fee - Select \$ Fee from the drop down, then enter the amount the office receives. In this example \$500.00
- 3. Agent Commission - By default will be 100% of the balance. Add in the Listing Agent and the Selling Agent by clicking the green Add Agent button. Then enter the percentage each agent receives for their part of the sale in the listing splits column. In this example 70% for listing and 30% for selling.

:: Commission : #1P0008 - 654 Victoria Street, Sydney

Full View

General For Sale Features OFI Agents & Contacts Resources **Commission**

Gross commission (based on 2% of \$1,000,000.00) = \$20,000.00

Item	% or \$Fee	Value	Amount	Recipient									
1. Office Commission	\$ Fee	1500	\$1,500.00	Your Agency									
Commission Balance = \$18,500.00													
2. Advertising Fee	\$ Fee	500	\$500.00	Your Agency									
Commission Balance = \$18,000.00													
3. Agent Commission	%	100	\$18,000.00	<table border="0"> <thead> <tr> <th></th> <th>Listing Splits</th> <th>Agent Splits</th> </tr> </thead> <tbody> <tr> <td><input checked="" type="checkbox"/> John Smith (Listing Agent)</td> <td>70%</td> <td>\$12,600.00</td> </tr> <tr> <td><input checked="" type="checkbox"/> Melanie Thompson (Selling Agent)</td> <td>30%</td> <td>\$5,400.00</td> </tr> </tbody> </table>		Listing Splits	Agent Splits	<input checked="" type="checkbox"/> John Smith (Listing Agent)	70%	\$12,600.00	<input checked="" type="checkbox"/> Melanie Thompson (Selling Agent)	30%	\$5,400.00
	Listing Splits	Agent Splits											
<input checked="" type="checkbox"/> John Smith (Listing Agent)	70%	\$12,600.00											
<input checked="" type="checkbox"/> Melanie Thompson (Selling Agent)	30%	\$5,400.00											

Deduction Add Agent

9. Click Finish to complete and Print Commission to print a report for the agent/s.

1323120127.pdf - Adobe Acrobat Pro

File Edit View Window Help

Create


1 / 1 91.8%

Tools Comment Share

YOUR AGENCY
 4 Cornwallis Street, Eveleigh NSW 2015
 Phone: 02 9209 4174 dd-
 Fax: 02 9310 7232
 Email: office@agentbox.com.au
 ABN: 11 222 112 142

Monday, 5th December 2011
Commission Report

Property Details



654 Victoria Street, Sydney

Settlement Date: 05/12/2011
Sold Price: \$1000000
Commission: 2%

Commission

Gross Commission (based on 2% of \$1,000,000.00) = \$20,000.00

Items	% or \$ Fee	Value	Amount	Recipient
1. Office Commission	\$ Flat Fee	\$1,500.00	\$1,500.00	Your Agency
Commission Balance = \$18,500.00				
2. Advertising Fee	\$ Flat Fee	\$500.00	\$500.00	Your Agency
Commission Balance = \$18,000.00				

Contacts

Contacts



In 'Contacts' you can add/edit your contacts, run advanced searches to send bulk communications e.g weekly e-newsletters etc

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

[How do I add a Company/Business?](#)

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

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

[How do I add a related contact?](#)

[How do I setup a letter head for a contact?](#)

[How do I subscribe contacts to e-newsletters?](#)

[How do I add buyer/tenant requirements to a contact?](#)

[How do I search for a contact?](#)

[How do I search for a group of contacts?](#)

[How do I print a detailed contact report?](#)

[How do I view properties a contact has inspected?](#)

[How do I send an email to a contact?](#)

[How do I SMS a contact?](#)

[How do I send an e-newsletter to a contact?](#)

[How do I log a contact enquiry?](#)

[How do I log inspection feedback by appointment?](#)

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

[How do I add a meeting to a contact?](#)

[How do I add a note to a contact?](#)

[How do I add a task to a contact?](#)

[How do I apply an activity schedule to a contact?](#)

[How do I send a letter to a contact?](#)

The Contact Card

The Contact Card Tabs

The contact card is made up of panels and action icons. If you open a contact via the main menu the main panel and left panel will open together. If you open a contact via a drop-down, or the universal search bar only the centre panel will open. If only the main panel opens you can click Full View in the top right hand corner of the panel to open the corresponding left panel.

- [Main Contact Panel & Tabs](#)
- [Property Action Icons](#)
- [Left Panel Tabs](#)

Contact Panel Tabs

Main Contact Panel & Tabs

Contact Card	Requirements	Related Properties (2)	Supplier Items
--------------	--------------	------------------------	----------------

*Note: Only the Contact Card and Requirements tab will show by default. The Related Properties tab will become available once you have linked one or more properties to the contact and the Supplier Items tab will only be available if they are ticked as a supplier in the Contact Class section of the Contact Card panel.

- [Contact Card](#) - In this section you can add the main contact information e.g. Phone, Address etc you can also [subscribe](#) them to newsletters, [add related contacts](#), [properties](#) and setup a [letter head](#) for mailings.
- [Requirements](#) - In this section you can add the buyer/investor/tenant etc requirements for your automatic buyer alert and match contact to property tools.
- [Related Properties](#) - In this section you can view all related properties to a contact and how they are related.
- [Supplier Items](#)- In this section you can add/edit products and pricing for your suppliers, which can then be used when logging [marketing funds](#).

Contact Action Icons

Contact Action Icons



From Left to Right

- [Email](#) - Send an email directly to the contact and view previously sent emails
- [SMS](#) - Send an SMS directly to the contact (SMS credits to be purchased in advance, contact support on 02 9209 4174 or support@agentbox.com.au)

- [E-Newsletter](#) - Send an e-newsletter directly to the contact
- [Log Enquiry](#) - Log an enquiry made on a property by the contact
- [Match Properties](#) - Match available properties suitable for the contact. Only appears if [requirements](#) have been entered.
- [Log Feedback by Appointment](#) - Log feedback on a property the contact has inspected by appointment.
- [Add a Note](#) - Add notes against the contact and view previous notes.
- [Add a Meeting](#) - Schedule a meeting with this contact.
- [Tasks & Activity Schedules](#) - Apply a single task, activity schedule or view active and completed tasks against the contact.
- [Send a Letter](#) - Send a letter directly to the contact, edit/create a letter template and access previously sent letters.

:: Contact : Joseph Thomas

Full View

Contact Card Requirements Related Properties (2) Supplier Items

Status: * Active

:: Contact 1 ::

Title: Mr Home Phone:

Salutation: Joe Work Phone: 02 9467 7354

First Name: Joseph Mobile:

Last Name: Thomas Facsimile:

Email: joe@hotmail.com Company: * Apex Printers

Residential Address: 25 Keller St

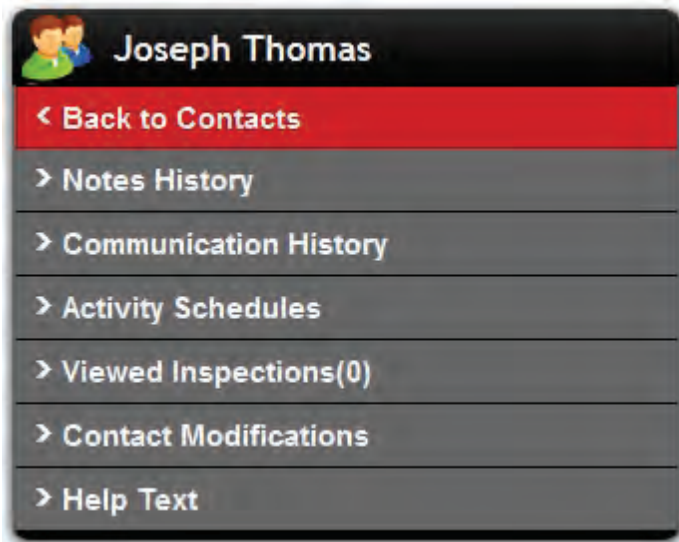
Suburb: Killara State: NSW

Save

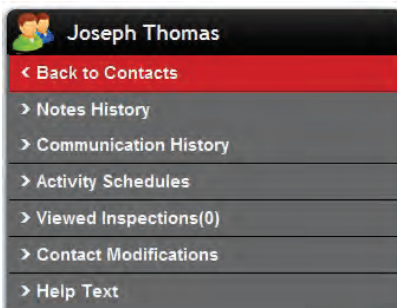
Left Panel Tabs

Left Contact Panel Tabs

If you are unable to view the left panel, please click Full View in the top right hand corner of the [main contact panel](#).



- [Notes History](#) - This section will display all saved notes relating to the contact
- [Communication History](#) - This section combines sent emails, SMS, e-newsletters and logged enquiries to create an extensive history of all communication the office has had with the contact.
- [Activity Schedules](#) - This section allows you to view the activity schedules applied to the contact and the tasks involved in each.
- [Viewed Inspections](#) - This section lists all inspections the contact has and allows you to edit feedback made.
- [Contact Modifications](#) - This section allows Master Users to view all changes to the contact card with record of the date, time and which user made the change.



Import Contacts

How do I import a Contact CSV/spreadsheet?

WARNING: This function is not designed to handle large CSV files. This is due to the processing involved with duplicate checking designed to ensure integrity of your contact data. The Maximum number of contacts (lines in CSV) able to be imported in one round is 1,000. If you need to import more than 1,000 contacts, please split up your CSV files and repeat the process for each file. Please contact Agentbox Support should you require a quote to bulk import contacts on a larger scale.

**Note: Only Master Users have access to this tool*

1. Click on the Contacts icon from the Main Menu



2. Click on Import CSV from the Left Contact Panel

A screenshot of a software interface titled "Contacts". At the top left is an icon of two people. Below the title is a section labeled "Fast Find" with a bullet point. A yellow box contains the text: "The system will auto filter your results based on how much info you enter below." Below this are three input fields labeled "First Name:", "Last Name:", and "Company:". Underneath the fields is a link labeled "Advanced Search". At the bottom of the panel are two buttons with bullet points: "Add a Contact" and "Import CSV".

3. Click the green Upload button

Import Upload ✕

Import Upload
Import Options
Import Confirm

IMPORTANT INFORMATION
 Before attempting to import Contacts, please ensure the data in your CSV file is correct. The system does not format or alter the data before importing into the database. If you bulk import your Contacts and one of the fields is incorrect (for example your CSV file has dropped the "0" in front of mobile numbers, making them "432101234" instead of "0432101234") then it will be difficult to rectify the situation later.

Duplicate Contacts
 The system will check if any of the contacts being imported are already contacts in the database - matching by email address, mobile number, or the combination of First & Last Name with Home/Work Phone or Address.
 Please select the appropriate action you'd like taken on the Import Options tab should any duplicate contacts be detected.

- Skip:** This option will ignore all contacts from the CSV that are already existing contacts in the database.
- Append Missing Information:** This option will add any additional information from the CSV file to the existing contact in the database. It will not overwrite the existing contact.
- Overwrite:** This option will overwrite the existing contact in the database with the values from the CSV file (excluding any fields that were used to match the contact or any fields that are blank in the CSV file).

Contact Categories and Assigned Staff
 This function is designed to import groups of contacts from the same category (contact class / custom class) and belonging to the same staff member (assigned staff). Please select the Contact Class(es), Custom class(es), Assigned Staff & Subscriptions on the Import Options tab that are to be applied to ALL contacts in this import.

WARNING: This function is not designed to handle large CSV files. This is due to the processing involved with duplicate checking designed to ensure integrity of your contact data. The Maximum number of contacts (lines in CSV) able to be imported in one round is 1,000. If you need to import more than 1,000 contacts, please split up your CSV files and repeat the process for each file. Please contact Agentbox Support should you require a quote to bulk import contacts on a larger scale.

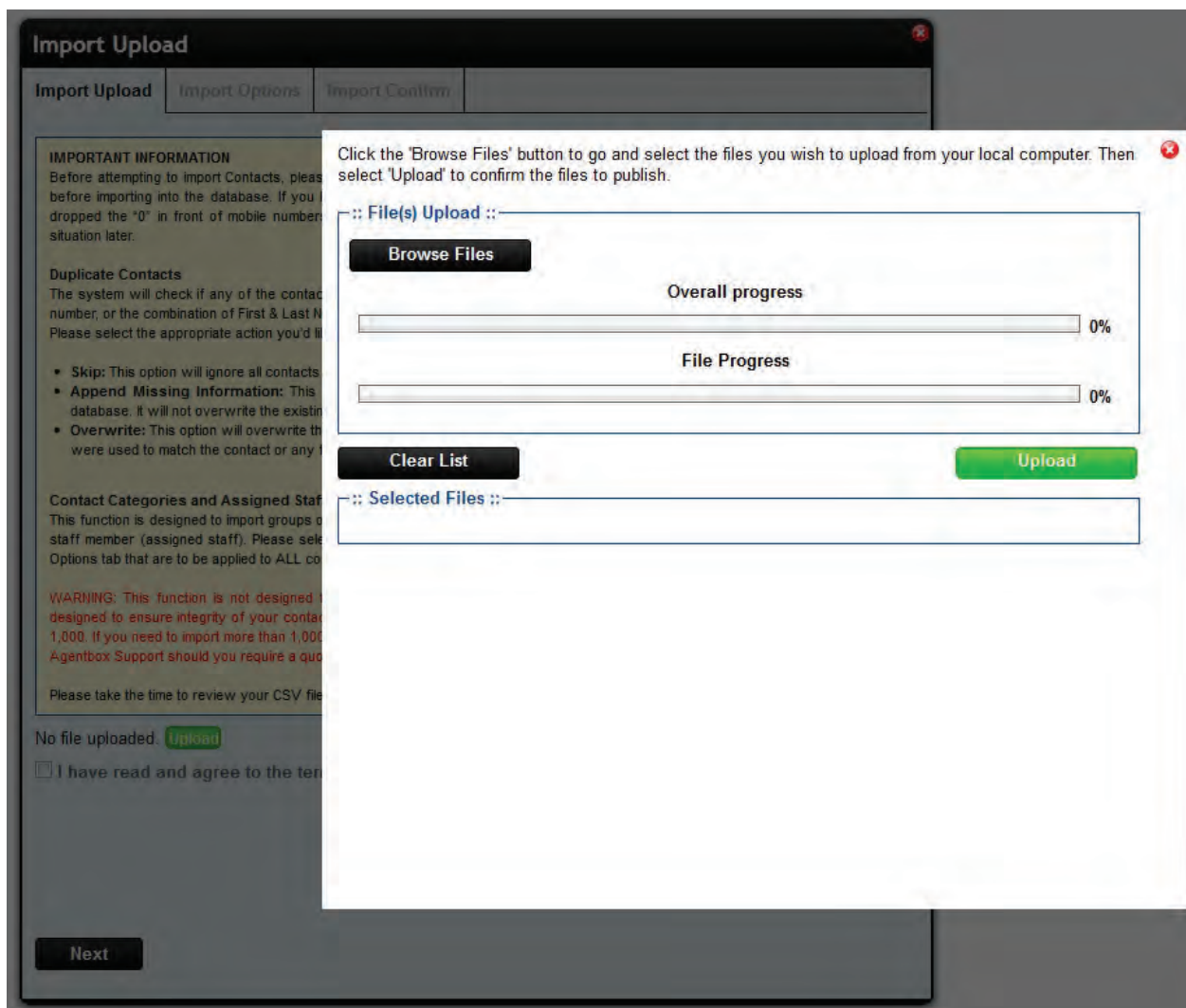
Please take the time to review your CSV file before proceeding. Charges will apply for any bulk modifications required after import.

No file uploaded. Upload

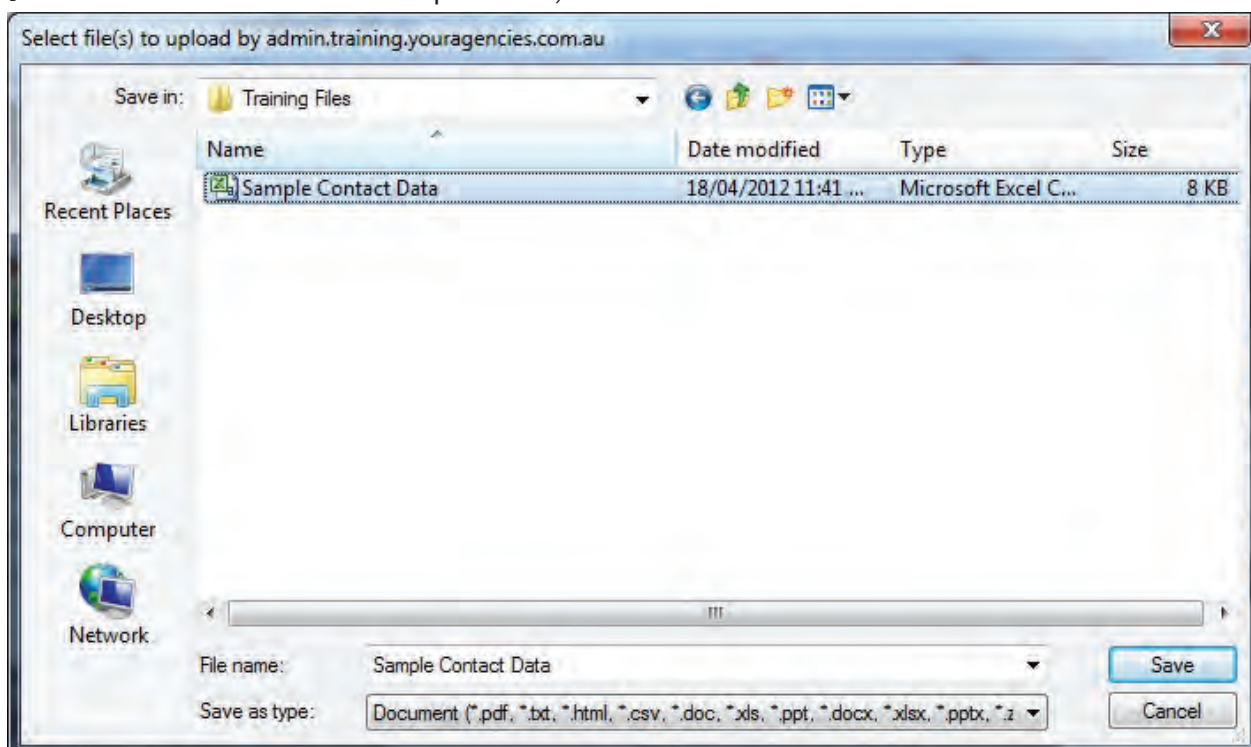
I have read and agree to the terms and conditions for importing contacts.

Next

4. Click Browse Files



5. Locate Photo located within computer files, click on the file then select Save



6. Click the green Upload button

Click the 'Browse Files' button to go and select the files you wish to upload from your local computer. Then select 'Upload' to confirm the files to publish.

:: File(s) Upload ::

Browse Files

Overall Progress (8 kB)



0%

File Progress

0%

Clear List **Upload**

:: Selected Files ::

 **Sample Contact Data.csv** 8 kB 

7. Once uploaded, read and tick that you have read and agree to the terms and conditions for importing contacts and click next

Import Upload

Import Upload
Import Options
Import Confirm

IMPORTANT INFORMATION
 Before attempting to import Contacts, please ensure the data in your CSV file is correct. The system does not format or alter the data before importing into the database. If you bulk import your Contacts and one of the fields is incorrect (for example your CSV file has dropped the "0" in front of mobile numbers, making them "432101234" instead of "0432101234") then it will be difficult to rectify the situation later.

Duplicate Contacts
 The system will check if any of the contacts being imported are already contacts in the database - matching by email address, mobile number, or the combination of First & Last Name with Home/Work Phone or Address.
 Please select the appropriate action you'd like taken on the Import Options tab should any duplicate contacts be detected.

- **Skip:** This option will ignore all contacts from the CSV that are already existing contacts in the database.
- **Append Missing Information:** This option will add any additional information from the CSV file to the existing contact in the database. It will not overwrite the existing contact.
- **Overwrite:** This option will overwrite the existing contact in the database with the values from the CSV file (excluding any fields that were used to match the contact or any fields that are blank in the CSV file).

Contact Categories and Assigned Staff
 This function is designed to import groups of contacts from the same category (contact class / custom class) and belonging to the same staff member (assigned staff). Please select the Contact Class(es), Custom class(es), Assigned Staff & Subscriptions on the Import Options tab that are to be applied to ALL contacts in this import.

WARNING: This function is not designed to handle large CSV files. This is due to the processing involved with duplicate checking designed to ensure integrity of your contact data. The Maximum number of contacts (lines in CSV) able to be imported in one round is 1,000. If you need to import more than 1,000 contacts, please split up your CSV files and repeat the process for each file. Please contact Agentbox Support should you require a quote to bulk import contacts on a larger scale.

Please take the time to review your CSV file before proceeding. Charges will apply for any bulk modifications required after import.

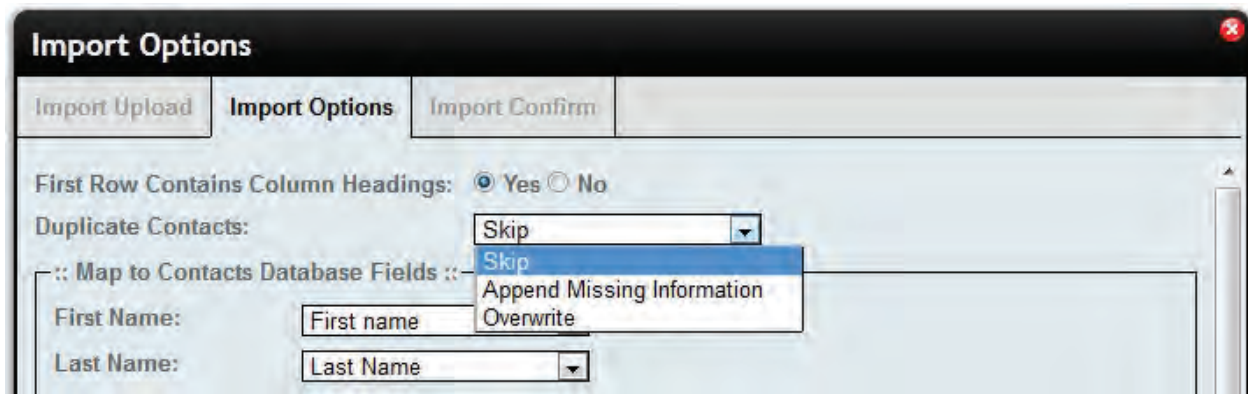
CSV
Delete

Sample Contact Data.csv | Uploaded 18th Apr, 2012 | 8 KB

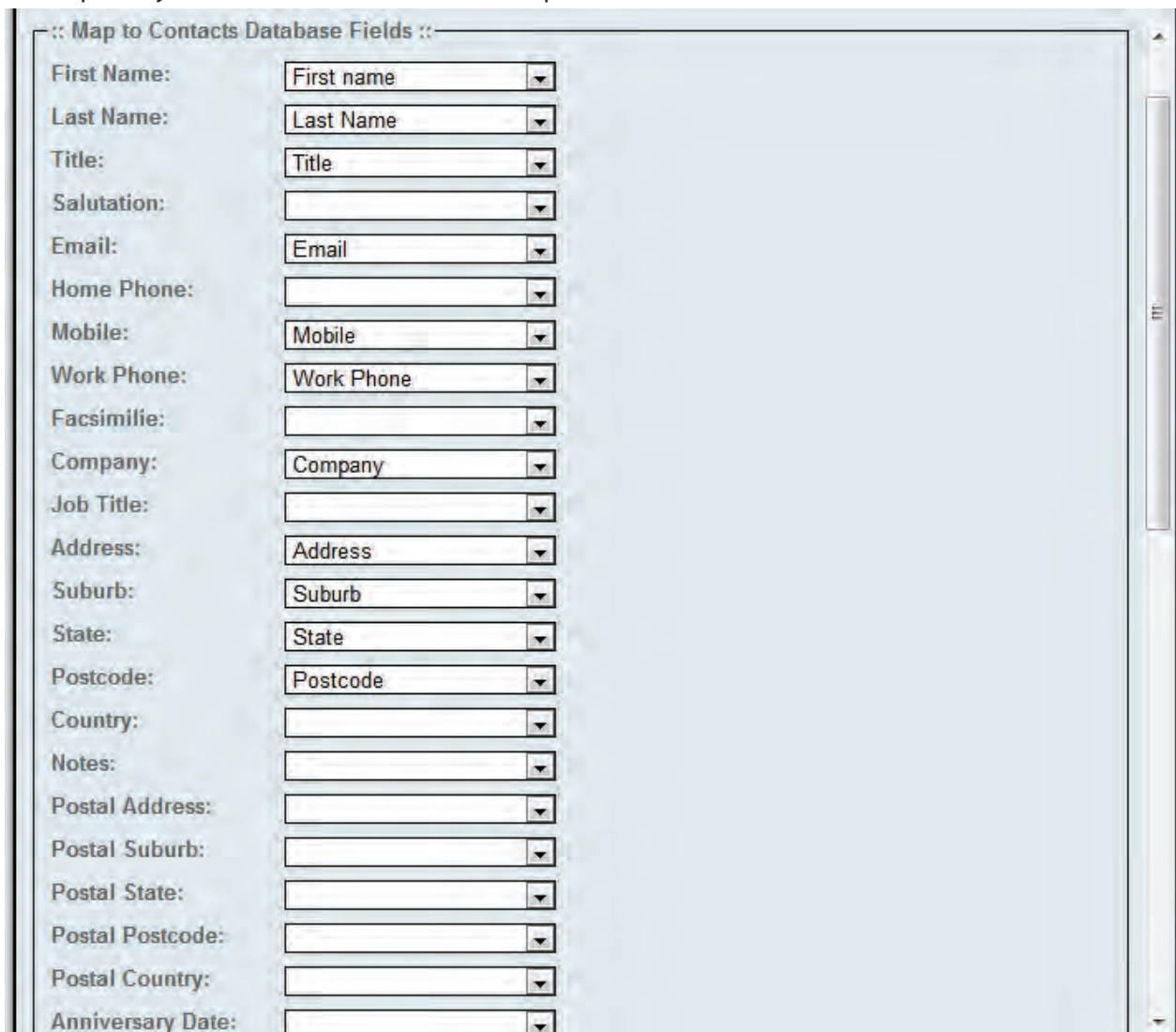
I have read and agree to the terms and conditions for importing contacts.

Next

8. Select Yes if the first row of data contains headings for each column.
9. Select how you would like the system to respond to duplicate contacts, in this example we will append missing information.
 - Skip (completely ignore the contact)
 - Append Missing Information (update the existing contact with the additional data entered)
 - Overwrite (completely overwrite the existing record with the data in the file)



10. Map the system fields with the fields in the spread sheet



11. Select the contact classes, custom classes, assigned staff and bulk subscribe the contacts and click next.

:: Contact Class ::

Contact Class: Accountant
 Auctioneer
 Business
 Buyer
 Other

Class Group: Filter Custom Class

Custom Class: Please Select Your Custom Class and Click on 'Add' **Add**

Selected Custom Class:

Add Custom

:: More Options ::

Assigned Staff: Office Admin
 Karen Cole
 Joanne Coughlan
 John Harris
 Other

Subscribe To: Newsletters
 Property Updates
 OFI Times
 Auction Reminders
 Other

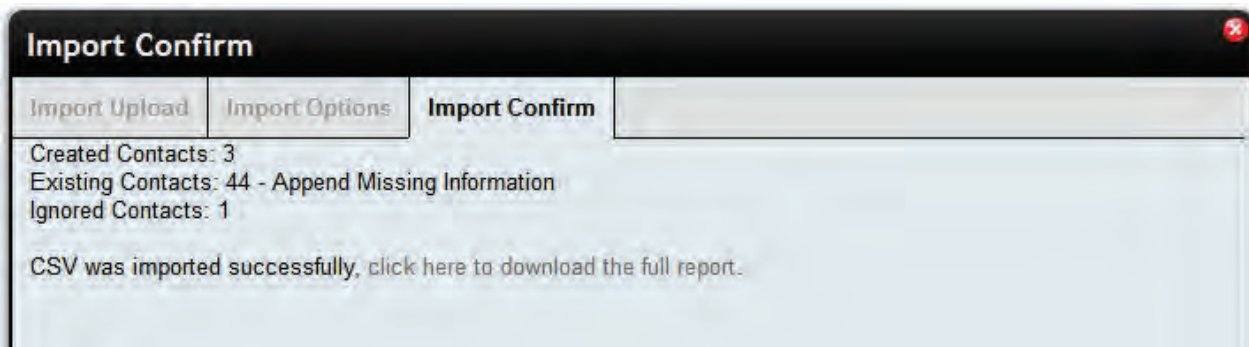
By selecting any of the above options you confirm you have obtained explicit permission from the person to receive marketing material from this office.

Next

12. Review and confirm the format the data will be imported and click Confirm



13. You will receive a summary of the contact import and you can also download a full report



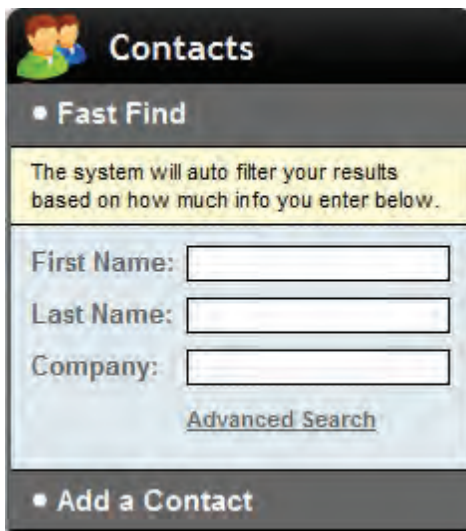
Add Contact

How do I add a Contact?

1. Click on the Contacts icon from the Main Menu



2. Click on Add a Contact from the Left Contact Panel

A vertical sidebar panel with a dark header containing a contact icon and the word "Contacts". Below the header is a section titled "Fast Find" with a yellow background and the text "The system will auto filter your results based on how much info you enter below." This section contains three input fields labeled "First Name:", "Last Name:", and "Company:". Below these fields is a link for "Advanced Search". At the bottom of the panel is a dark footer with the text "Add a Contact".

:: Contact : Create

Step 1 of 2 - Complete Contact Info

:: Contact 1 ::

Title: Home Phone:
 Salutation: Work Phone:
 First Name: * Mobile:
 Last Name: * Facsimile:
 Email: Company:
 Residential Address: Street No., Street Name
 Suburb: State:
 Postcode: Country:
 Postal Address: * Check if postal address is different to residential address
 Contact Method: Anniv Date:

Contact Class: *
 Accountant
 Past Vendor
 Auctioneer
 Prospective Landlord
 Business
 Prospective Vendor
 Buyer
 Purchaser
 Buyer Solicitor
 Referrer
 Coniunctional Agent
 Solicitor

3. Complete the Contact Info using the following guidelines.

- * Title
- * Salutation (This will be used to address the contact in E-Newsletters, if nothing is entered the First Name is used)
- * First Name & Surname (These fields are compulsory unless the contact class 'Business' is ticked)
- * Phone numbers
- * Email (Agentbox automatically checks a valid email address has been entered)
- * Company (This field is compulsory if the contact class 'Business' is ticked)
- * Residential Address
- * Postal Address (check box to enter in a postal address)
- * Contact Method:
- * Anniversary Date
- * Contact Class:
- * Class Group
 - A Class Group is a folder which groups Custom Classes together. To add a Class Group click on the green Add Custom button.*
- * Custom Class
- * Contact Source: Auto Email, Email Enquiry, Import, Open Homes Inspection, Other, Phone Enquiry, Website Enquiry
- * Assigned Staff (depending on office sharing policies, this can be used to give access)
- * Contact Comments
- * Subscriptions: Auction Reminders, Newsletters, OFI Times, Property Updates, Sales Results

***Notes:**

- First Name & Surname are compulsory unless the contact class Business is checked and a Company name is entered.
- Agentbox requires either an email address or mobile to eliminate the possibility of duplicates. A contact can still be created with only a phone number or physical address.
- All contacts require at least one Contact Class, they can belong to multiple classes.
- At least one Assigned Agent is required on each contact.
- Newsletters - If ticked will add the contact to the subscribers recipient list to all manually created mass e-newsletter blasts. Without this subscription, you cannot include the contact in a mass e-newsletter.
- Property Updates - If ticked, will subscribe the contact to receive automatic e-newsletters containing any new listing or that have had a price update which match their requirements.
- Most other newsletter subscriptions are for sorting the contacts newsletter preferences but are not automated. This can vary depending on office setup.

4. Click Save & Proceed.

**Note: If the contact you have added is classified as a Buyer or Tenant, once clicking Save & Proceed you will be taken to the Requirements tab of the Contact Card to enter Buyer/Tenant Requirements.*

Add Business

How do I add a Business?

1. Click on the Contacts icon from the Main Menu



2. Click on Add a Contact from the Left Contact Panel

:: Contact : Create

Step 1 of 2 - Complete Contact Info

Contact Card Requirements

:: Contact 1 ::

Title: Home Phone:

Salutation: Work Phone:

First Name: * Mobile:

Last Name: * Facsimile:

Email: Company:

Residential Address:

Suburb: State:

Postcode: Country:

Postal Address: * Check if postal address is different to residential address

Contact Method: Anniv Date:

Contact Class: *

<input type="checkbox"/> Accountant	<input type="checkbox"/> Past Vendor
<input type="checkbox"/> Auctioneer	<input type="checkbox"/> Prospective Landlord
<input type="checkbox"/> Business	<input type="checkbox"/> Prospective Vendor
<input type="checkbox"/> Buyer	<input type="checkbox"/> Purchaser
<input type="checkbox"/> Buyer Solicitor	<input type="checkbox"/> Referrer
<input type="checkbox"/> Coniunctional Agent	<input type="checkbox"/> Solicitor

Save & Proceed »

3. Complete the Contact Info using the following guidelines.

- * Title
- * Salutation (This will be used to address the contact in E-Newsletters, if nothing is entered the First Name is used)
- * First Name & Surname (These fields are compulsory unless the contact class 'Business' is ticked)
- * Phone numbers
- * Email (Agentbox automatically checks a valid email address has been entered)
- * **Company** (This field is compulsory if the contact class 'Business' is ticked)
- * Residential Address
- * Postal Address (check box to enter in a postal address)
- * Contact Method:
- * Anniversary Date
- * Contact Class: (Select at least '**Business**' and any other relevant classes e.g. supplier, solicitor etc)
- * Class Group:
 - A Class Group is a folder which groups Custom Classes together. To add a Class Group click on the green Add Custom button.*
- * Custom Class
- * Contact Source: Auto Email, Email Enquiry, Import, Open Homes Inspection, Other, Phone Enquiry, Website Enquiry (May vary per office)
- * Assigned Staff (depending on office sharing policies, this can be used to give access)
- * Contact Comments
- * Subscriptions: Auction Reminders, Newsletters, OFI Times, Property Updates, Sales Results

**Note: Minimum requirements:*

- *First Name & Surname are compulsory unless the contact class Business is checked and a Company name is entered.*
- *Agentbox requires either an email address or mobile to eliminate the possibility of duplicates. A contact can still be created with only a phone number or physical address.*
- *All contacts require at least one Contact Class, they can belong to multiple classes.*
- *At least one Assigned Agent is required on each contact.*

4. Click Save & Proceed.

Add Supplier

How do I add a Supplier?

1. Click on the Contacts icon from the Main Menu



2. Click on Add a Contact from the Left Contact Panel

A screenshot of a software interface. At the top, there's a dark header with a person icon and the word 'Contacts'. Below that is a section titled 'Fast Find' with a bullet point. A yellow box contains the text: 'The system will auto filter your results based on how much info you enter below.' Below this are three input fields labeled 'First Name:', 'Last Name:', and 'Company:'. Underneath the fields is a link that says 'Advanced Search'. At the bottom of the panel is another dark header with a bullet point and the text 'Add a Contact'.

:: Contact : Create

Step 1 of 2 - Complete Contact Info

Contact Card Requirements

:: Contact 1 ::

Title: Home Phone:

Salutation: Work Phone:

First Name: * Mobile:

Last Name: * Facsimile:

Email: Company:

Residential Address:

Suburb: State:

Postcode: Country:

Postal Address: * Check if postal address is different to residential address

Contact Method: Anniv Date:

Contact Class: *

<input type="checkbox"/> Accountant	<input type="checkbox"/> Past Vendor
<input type="checkbox"/> Auctioneer	<input type="checkbox"/> Prospective Landlord
<input type="checkbox"/> Business	<input type="checkbox"/> Prospective Vendor
<input type="checkbox"/> Buyer	<input type="checkbox"/> Purchaser
<input type="checkbox"/> Buyer Solicitor	<input type="checkbox"/> Referrer
<input type="checkbox"/> Coniunctional Agent	<input type="checkbox"/> Solicitor

Save & Proceed »

3. Complete the Contact Info using the following guidelines.

- * Title
- * Salutation (This will be used to address the contact in E-Newsletters, if nothing is entered the First Name is used)
- * First Name & Surname (These fields are compulsory unless the contact class 'Business' is ticked)
- * Phone numbers
- * Email (Agentbox automatically checks a valid email address has been entered)
- * **Company** (This field is compulsory if the contact class 'Business' is ticked)
- * Residential Address
- * Postal Address (check box to enter in a postal address)
- * Contact Method:
- * Anniversary Date
- * Contact Class: Select at least '**Business**' and '**Supplier**' plus any other relevant classes
- * Class Group:
 - A Class Group is a folder which groups Custom Classes together. To add a Class Group click on the green Add Custom button.*
- * Custom Class
- * Contact Source: Auto Email, Email Enquiry, Import, Open Homes Inspection, Other, Phone Enquiry, Website Enquiry (May vary per office)
- * Assigned Staff (depending on office sharing policies, this can be used to give access)
- * Contact Comments
- * Subscriptions: Auction Reminders, Newsletters, OFI Times, Property Updates, Sales Results

**Note: Minimum requirements:*

- First Name & Surname are compulsory unless the contact class Business is checked and a Company name is entered.
- Agentbox requires either an email address or mobile to eliminate the possibility of duplicates. A contact can still be created with only a phone number or physical address.
- All contacts require at least one Contact Class, they can belong to multiple classes.
- At least one Assigned Agent is required on each contact.

4. Click Save & Proceed.

:: Contact : Apex Printing

Full View

Contact Card Requirements Supplier Items

Status: * Active

:: Contact 1 ::

Title: [] Home Phone: []

Salutation: [] Work Phone: 02 9234 7654

First Name: [] Mobile: []

Last Name: [] Facsimile: []

Email: ap@printing.com Company: * Apex Printing

Residential Address: 243 Liverpool St

Suburb: [] State: NSW

Postcode: [] Country: Australia

Postal Address: [] * Check if postal address is different to residential address

Contact Method: Work Phone Anniv Date: 0 0 []

Add Related Contact Add Related Property Setup Letter Head

Contact Class: * Accountant Past Vendor
 Auctioneer Prospective Landlord

Save

See Also...

[Supplier Items](#)

Supplier Items

How do I add Supplier Items?

1. [Search for your Supplier Contact](#) and open their [Contact Card](#)

:: Contact : Apex Printing Full View

@ 📞 📄 ? 🏠 📝 📅 📧

Contact Card | Requirements | Supplier Items

Status: * Active

:: Contact 1 ::

Title:	 	Home Phone:	
Salutation:	 	Work Phone:	02 9234 7654
First Name:	 	Mobile:	
Last Name:	 	Facsimile:	
Email:	ap@printing.com	Company: *	Apex Printing
Residential Address:	243 Liverpool St		
Suburb:	 	State:	NSW
Postcode:	 	Country:	Australia
Postal Address:	<input type="checkbox"/> * Check if postal address is different to residential address		
Contact Method:	Work Phone	Anniv Date:	0 0

Add Related Contact
Add Related Property
Setup Letter Head

Contact Class: *

<input type="checkbox"/> Accountant	<input type="checkbox"/> Past Vendor
<input type="checkbox"/> Auctioneer	<input type="checkbox"/> Prospective Landlord

Save

2. Click on the Supplier Items tab

:: Contact : : New Item Full View

Contact Card | **Requirements** | **Supplier Items**

Item Name: *

Price: *

Comment: *

Save

3. Enter Item Name, Price & Item Comment/Description

:: Contact : : New Item

Full View

Contact Card Requirements **Supplier Items**

Item Name: *

Price: *

Comment: *

4. Click Save

5. Follow steps 3 & 4 to add additional Supplier Items. Each Supplier Item will be added to the Existing Items list.

Add Related Contact

How to add a Related Contact

- If both contacts share communication/contact info e.g. you can reach either of them from a single email, mobile, phone or address then add them both in the same contact card using the primary contacts first and last name then using the salutation field to enter both contacts names
 e.g. Salutation: John & Mary
 First Name: John
 Surname: Smith
- If both contacts have different surnames or have their own unique contact info e.g. 2 mobile numbers you then create a related contact using the following steps. This is to help keep a clean database where your contacts are contactable separately e.g. in the case of a couple that has separated since your dealings with them.

1. [Search for your Contact](#) and open their [Contact Card](#)

:: Contact : Mary May Full View

@ Calculator Document Help Home Mail Calendar Lists Mail

Contact Card | Requirements | Related Properties (1)

Status: *

:: Contact 1 ::

Title:	<input type="text" value="Miss"/>	Home Phone:	<input type="text" value="02 9209 4174"/>
Salutation:	<input type="text"/>	Work Phone:	<input type="text" value="02 9523 5642"/>
First Name: *	<input type="text" value="Mary"/>	Mobile:	<input type="text" value="0411 222 555"/>
Last Name: *	<input type="text" value="May"/>	Facsimile:	<input type="text" value="02 9209 4175"/>
Email:	<input type="text" value="mm@hotmail.com"/>	Company:	<input type="text"/>
Residential Address:	<input type="text" value="1 Miles Road"/>		
Suburb:	<input type="text" value="Camperdown"/>	State:	<input type="text" value="NSW"/>
Postcode:	<input type="text" value="2050"/>	Country:	<input type="text" value="Australia"/>
Postal Address:	<input type="checkbox"/> * Check if postal address is different to residential address		
Contact Method:	<input type="text" value="Email"/>	Anniv Date:	<input type="text" value="0"/> <input type="text" value="0"/> <input type="text"/> <input type="text"/>

2. On the main contact card click the green Add Related Contact button

Add Related Contact

Is this an existing contact or,
 Is this a new contact

Select Related Contact:*
Enter Contact Name or Email

Related Contact's Relationship:*
Defacto

Primary Contact's Relationship:*
Defacto

Save Cancel

3. Select

Is this an existing contact or,
Is this a new contact

4. If an existing contact then enter contacts name in Select Related Contact:* as seen above and select the corresponding contact from the results drop down
or if it is a new contact, enter the following information: **Note: at least one contact method e.g. mobile, email or landline is required.*

- * First Name*
- * Last Name:*
- * Company:
- * Email:
- * Mobile:
- * Home Ph:
- * Work Ph:

Add Related Contact

Is this an existing contact or,
 Is this a new contact

First Name:
 Last Name:
 Company:
 Email:
 Mobile:
 Home Ph:
 Work Ph:

Related Contact's Relationship:*

Primary Contact's Relationship:*

5. Select the contacts relationship to each other. Select other to enter a custom relationship
- Related Contact's Relationship:*
- Primary Contact's Relationship:*

Add Related Contact

Is this an existing contact or,
 Is this a new contact

Select Related Contact:*

Related Contact's Relationship:*

Primary Contact's Relationship:*

6. Click Save

7. You can now view the Related Contact on the main Contact Card tab. Click on their name to open their contact card.

The screenshot shows a software window titled ":: Contact : Mary May". The window has a yellow title bar with standard OS window controls and a toolbar with icons for email, calculator, document, help, home, clock, edit, calendar, and envelope. The main content area is divided into tabs: "Contact Card" (selected), "Requirements", and "Related Properties (1)".

Under the "Contact Card" tab, the "Status" is set to "Active". Below this is a section for "Contact 1" with the following fields:

Title:	Miss	Home Phone:	02 9209 4174
Salutation:		Work Phone:	02 9523 5642
First Name: *	Mary	Mobile:	0411 222 555
Last Name: *	May	Facsimile:	02 9209 4175
Email:	mm@hotmail.com	Company:	
Residential Address:	1 Miles Road		
Suburb:	Camperdown	State:	NSW
Postcode:	2050	Country:	Australia
Postal Address:	<input type="checkbox"/> * Check if postal address is different to residential address		
Contact Method:	Email	Anniv Date:	0 0

At the bottom of the form, there are three green buttons: "Add Related Contact", "Add Related Property", and "Setup Letter Head". Below these buttons, a related contact is listed: "Matthew Warren (Spouse) Email: mw@bigpond.net Mobile: 0412 345 678". A "Save" button is located at the very bottom of the window.

Add Related Property

How to add a Related Property

1. [Search for your Contact](#) and open their [Contact Card](#)

:: Contact : Mary May

Full View

Contact Card Requirements

Status: * Active

:: Contact 1 ::

Title: Miss Home Phone: 02 9209 4174

Salutation: Work Phone: 02 9523 5642

First Name: * Mary Mobile: 0411 222 555

Last Name: * May Facsimile: 02 9209 4175

Email: mm@hotmail.com Company:

Residential Address: 1 Miles Road

Suburb: Camperdown State: NSW

Postcode: 2050 Country: Australia

Postal Address: * Check if postal address is different to residential address

Contact Method: Email Anniv Date: 0 0

Add Related Contact Add Related Property Setup Letter Head

Save

2. On the Contact Card tab click the green Add Related Property button

Add Related Property

Select Property:*

Enter listing ID or Suburb name

Role:

Accountant

Save Cancel

3. Enter the property address in the Select Property:* search box then select the property you would like to relate from the results drop down.

Add Related Property

Select Property:*

14 Mars Lane

ID #1P0006 - 14 Mars Lane, Kensington

Accountant

Save Cancel

3. Select a Role from the Role drop down menu.

Add Related Property

Select Property:*

ID #1P0006 - 14 Mars Lane, Kensington

Role:

Accountant

Buyer

Buyer Solicitor

Conjunctional Agent

Developer

Investor

Landlord

Other

Owner Occupied

Past Purchaser

Past Vendor

Prospective Landlord

Prospective Vendor

Purchaser

Referrer

Solicitor

Supplier

Tenant

Tradesperson

Vendor

Vendor Solicitor

4. Click save to add the related property

Add Related Property

Select Property:*

ID #1P0006 - 14 Mars Lane, Kensington

Role:

Vendor

Save Cancel

5. The property will now appear in the Related Properties tab of the Contact Card and the Contact will appear on the Agents & Contacts tab of the Property Card.

:: Contact : Mary May

Full View

Contact Card Requirements Related Properties (1)

Status: * Active

:: Contact 1 ::

Title: Miss Home Phone: 02 9209 4174

Salutation: Work Phone: 02 9523 5642

First Name: * Mary Mobile: 0411 222 555

Last Name: * May Facsimile: 02 9209 4175

Email: mm@hotmail.com Company:

Residential Address: 1 Miles Road

Suburb: Camperdown State: NSW

Postcode: 2050 Country: Australia

Postal Address: * Check if postal address is different to residential address

Contact Method: Email Anniv Date: 0 0

Add Related Contact Add Related Property Setup Letter Head

Save

Letter Head

How do I create a letter head for a contact?

The letter head tool is designed to make setting up your variables on your letter template simple.

In agentbox you can add a residential address and a postal address. If you would like perform a mail merge to a lookup of contacts you can only use one type of address.

The solution to this is to use the letter head variable. The default letter head will use the residential address if this has been entered otherwise the main address will be used. There is also an additional feature which allows you to completely customise the addressing field without affecting the contacts residential or postal address on their contact card.

1. [Search for your Contact](#) and open their [Contact Card](#)

:: Contact : Mary Smith

Full View

Contact Card Requirements Related Properties (2)

Status: * Active

:: Contact 1 ::

Title: Miss Home Phone: 02 9209 4174

Salutation: Work Phone: 02 9523 5642

First Name: * Mary Mobile: 0411 222 555

Last Name: * Smith Facsimile: 02 9209 4175

Email: mm@hotmail.com Company:

Residential Address: 1 Miles Road

Suburb: Camperdown State: NSW

Postcode: 2050 Country: Australia

Postal Address: * Check if postal address is different to residential address

Contact Method: Email Anniv Date: 0 0

Add Related Contact Add Related Property Setup Letter Head

2. On the main contact card click the green Setup Letter head button

3. By default you will notice this has used the Title, First Name, Last Name, Company Name then either the residential or postal address (if it has been entered)

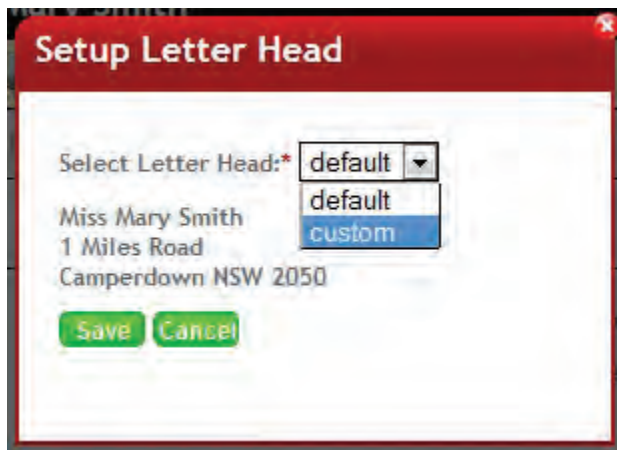
Setup Letter Head

Select Letter Head: * default

Miss Mary Smith
1 Miles Road
Camperdown NSW 2050

Save Cancel

4. To customise the address further select Custom from the Select Letter Head:* dropdown



5. Customise the letter head using the free text box.

E.g. Your contact John Smith is married to Mary and you would like to address them together in all communications. .

To include Mary on e-newsletters sent to John you can put John & Mary in the salutation field

To include Mary on all letters sent to John you can customise the letter head to always address Mr John and Mary Smith using this custom feature.



5. Click Save

Search for Contact

How can I search for my Contact?

There are three ways in which to search for a contact:

- Through the [Left Panel Fast Find](#)
- Through the [Universal Search Bar](#)
- Through an [Advanced Property Search](#)

[Left Panel Fast Find](#)

1. Click on the Contacts Icon from the mail menu



2. Enter client details in the Contacts Panel

This screenshot shows the 'Contacts' panel with search filters. The title 'Contacts' is at the top left. Below it is a section titled 'Fast Find (1 found)'. A yellow box contains the text: 'The system will auto filter your results based on how much info you enter below.' There are three input fields: 'First Name:' with 'Mary', 'Last Name:' with 'May', and 'Company:' which is empty. Below these fields is a link for 'Advanced Search'. At the bottom of the panel is a button labeled 'Add a Contact'.

3. Click on your Contact from the Fast Find Results panel

This screenshot shows the 'Contacts' panel on the left and a 'Fast Find Results' panel on the right. The 'Contacts' panel is identical to the previous one. The 'Fast Find Results' panel has a dropdown arrow and a close button (red 'x'). It displays the contact details for 'Mary May': '0411 222 555', '1 Miles Road', and 'Camperdown, NSW'. To the right of the text are icons for help (question mark), home, and search.

4. Your Contact Card will appear

:: Contact : Mary May

Full View

Contact Card Requirements

Status: * Active

:: Contact 1 ::

Title: Miss Home Phone: 02 9209 4174

Salutation: Work Phone: 02 9523 5642

First Name: * Mary Mobile: 0411 222 555

Last Name: * May Facsimile: 02 9209 4175

Email: mm@hotmail.com Company:

Residential Address: 1 Miles Road

Suburb: Camperdown State: NSW

Postcode: 2050 Country: Australia

Postal Address: * Check if postal address is different to residential address

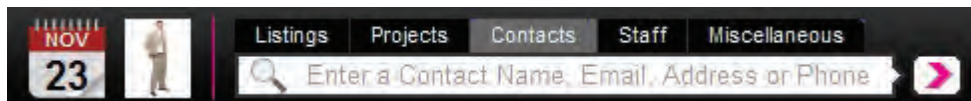
Contact Method: Email Anniv Date: 0 0

Add Related Contact Add Related Property Setup Letter Head

Save

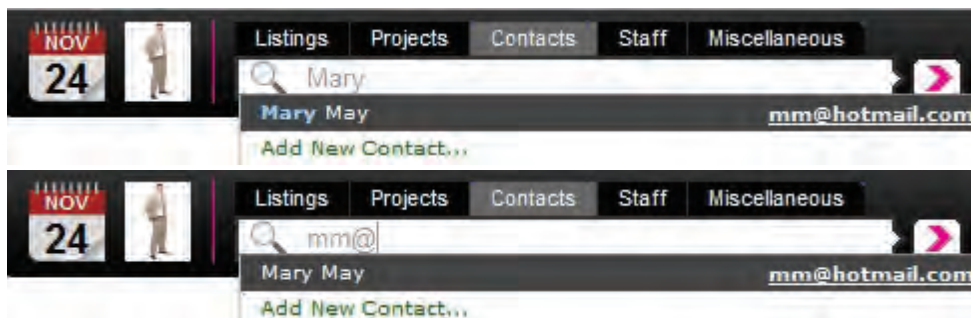
Universal Search Bar

1. Click on Contacts from the Universal Search Box at the top of the screen



2. Enter Contact name, email address or phone number (please note a minimum of 3 characters is required)

3. Contact Name will appear in a drop down



4. Click on the Contact Name or email address

5. Contact Card will appear on screen

The screenshot shows a software window titled "Contact : Mary May" with a "Full View" button. The window contains a "Contact Card" tab and a "Requirements" tab. The "Contact Card" tab is active and displays a form for "Contact 1". The form includes the following fields and values:

- Status: * Active (dropdown)
- Title: Miss (dropdown)
- Salutation: (empty)
- First Name: * Mary
- Last Name: * May
- Email: mm@hotmail.com
- Residential Address: 1 Miles Road
- Suburb: Camperdown
- Postcode: 2050
- Postal Address: (empty)
- Contact Method: Email (dropdown)
- Home Phone: 02 9209 4174
- Work Phone: 02 9523 5642
- Mobile: 0411 222 555
- Facsimile: 02 9209 4175
- Company: (empty)
- State: NSW (dropdown)
- Country: Australia (dropdown)
- Anniv Date: 0 / 0 / (empty) (calendar icon)

At the bottom of the form, there are three green buttons: "Add Related Contact", "Add Related Property", and "Setup Letter Head". Below these buttons is a "Save" button.

[Advanced Contact Search](#)

1. Please follow the steps under the [Advanced Contact Search](#) topic.

Advanced Contact Search

How do I search for a group of Contacts?

1. Click on the Contact icon from the main menu



2. Click on Advanced Search from the left panel

The screenshot shows a software interface with two main panels. On the left is a 'Contacts' sidebar with a 'Fast Find' section containing input fields for 'First Name', 'Last Name', and 'Company', and an 'Advanced Search' link. Below this is an 'Add a Contact' button. The main panel is titled 'Advanced Contact Search : New Search' and features a 'New Search' tab and a 'Saved Searches' dropdown. The 'Contact Search' section includes fields for 'First Name', 'Last Name', 'Home Phone', 'Mobile', 'Email', 'Company', 'Address', and 'Suburb'. There is also a 'Custom Filters' section with an 'edit' button and a message 'No filters created yet.', and a 'Subscribe To' section with checkboxes for 'Auction Reminders', 'Newsletters', 'OFI Times', 'Property Updates', and 'Sales Results'. The 'Group Search' section has a 'Sale/Rental' dropdown and a 'Search' button at the bottom.

3. Enter your Search Criteria into the appropriate fields. For example, you might search for all of your Active Buyers looking for a 3 bedroom house in Sydney.

You can search by:

* Individual Contact Search Fields:

- * Name, Phone numbers, Email, Company, Address, Suburb
- * Custom Filters:
- * Subscribe To: Auction Reminders, Newsletters, OFI Times, Property Updates, Sales Results

* Group Contact Search Fields:

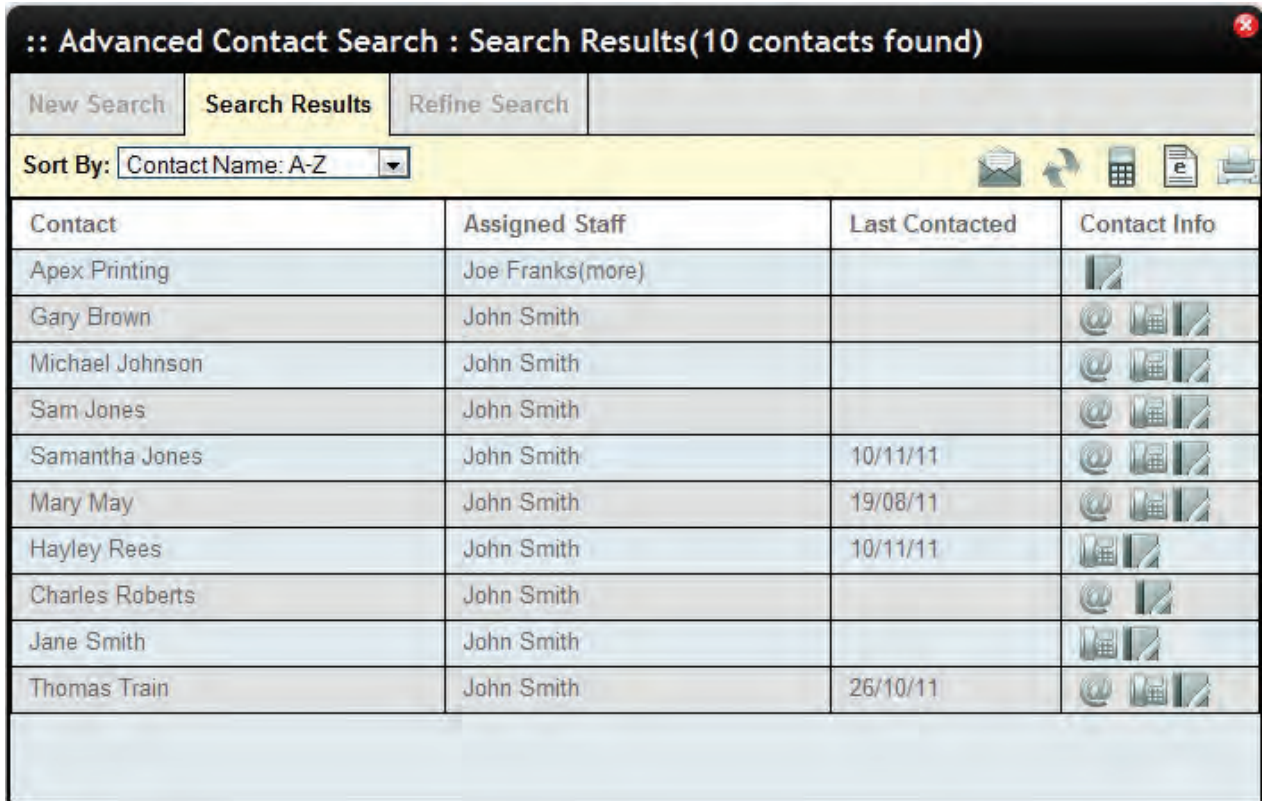
- * For Sale, For Lease
- * Status: Active, Archived, Do Not Contact, Unsubscribed
- * Class Group
- * Custom Class
- * Contact Class: Accountant, Buyer, Buyer Solicitor, Conjunction Agent, Developer, Investor, Landlord, Owner Occupier, Referrer, Solicitor, Supplier, Tenant, Tradesperson, Vendor, Vendor Solicitor

*Requirements:

- * Type: Residential, Rural, Commercial, Holiday, Business
- * Category: **Note: List of categories depends on the Property Type.*
- * State: ACT, NSW, NT, QLD, SA, TAS, VIC, WA
- * Regions: e.g Northern Suburbs, Western Suburbs
- * Suburbs:
- * Price, Bedrooms, Bathrooms, Parking
- * Assigned Staff
- * Property Related? (Tick this box if you would like an additional function to search by the address of a property related to a contact.)
- * Contact Source:
- * Date Range for 'Created From', 'Modified From' and 'Anniversary Date' lookups
- * Save Search?

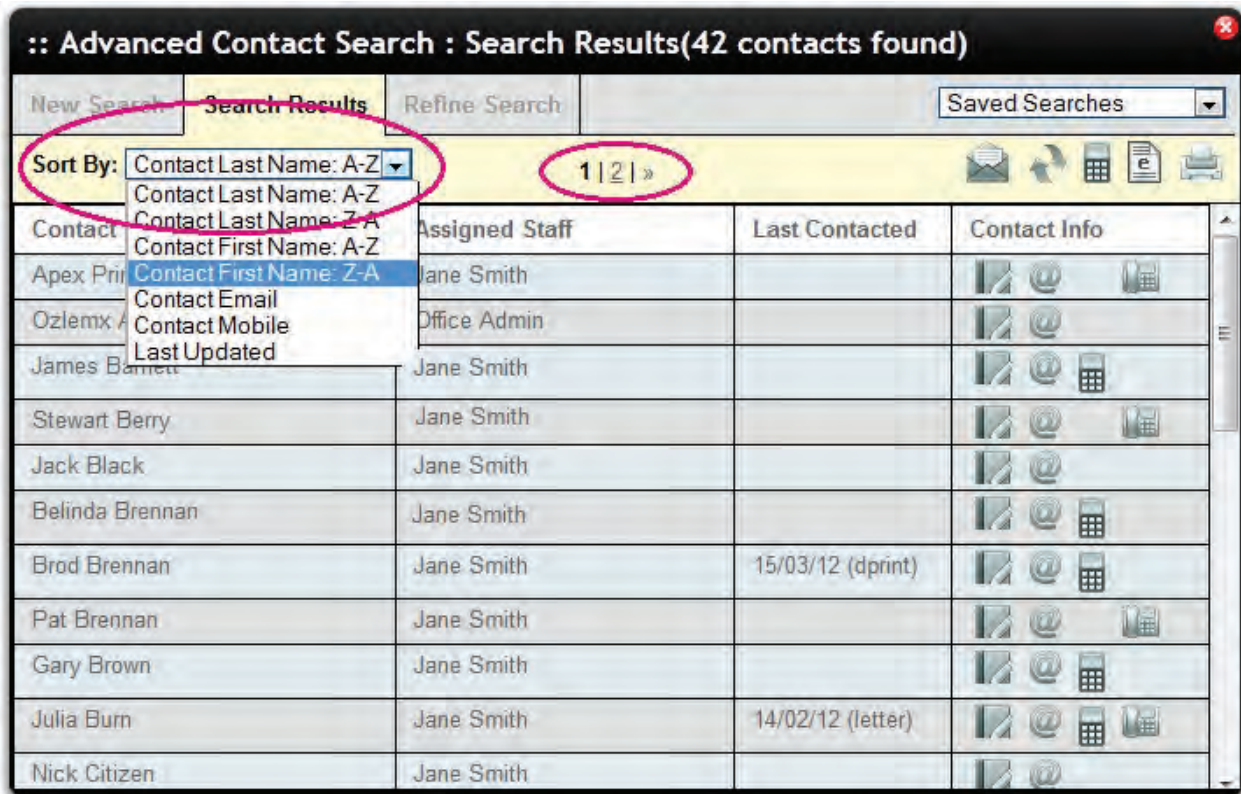
4. Click Search

5. Your Target List will appear on screen



Contact	Assigned Staff	Last Contacted	Contact Info
Apex Printing	Joe Franks(more)		
Gary Brown	John Smith		
Michael Johnson	John Smith		
Sam Jones	John Smith		
Samantha Jones	John Smith	10/11/11	
Mary May	John Smith	19/08/11	
Hayley Rees	John Smith	10/11/11	
Charles Roberts	John Smith		
Jane Smith	John Smith		
Thomas Train	John Smith	26/10/11	

6. You may sort your Target List via the Sort By drop down as well as scroll through your list using the Page Numbers. (Page Numbers will only appear if the number exceeds the first page limit).



7. Once you have generated your Target List you may generate a Mail Merge, download the list as a CSV file, send an SMS or an E-Newsletter or print a Contact Report via the Action icons.



How do I save my Contact Search in Agentbox?

**Note: the saved search will save the search criteria, not the actual results therefore any new contacts will appear each time you run the search.*

1. Open the [Advanced Contact Search](#) panel
2. Enter your Search Criteria into the appropriate fields

:: Advanced Contact Search : New Search

New Search Saved Searches

:: Contact Search ::

First Name: Last Name:

Home Phone: Mobile:

Email: Company:

Address: Suburb:

Custom Filters: edit No filters created yet.

Subscribe To:

- Auction Reminders
- Newsletters
- OFI Times
- Property Updates
- Sales Results

:: Group Search ::

Sale/Rental:

Search

3. In the Save Search field enter your Search name

:: Advanced Contact Search : New Search

New Search Saved Searches

Assigned Staff:

- Office Admin
- Joe Franks
- John Smith
- Jane Thomas
- Melanie Thompson

Property Related?:

Contact Source:

- Auto Email
- Email Enquiry
- Import
- Open Homes Inspection
- Other

Created From: Created To:

Modified From: Modified To:

Anniv Date From: Anniv Date To:

Save Search?: Newsletter Subscribers

Search

4. Click on Search

:: Advanced Contact Search : Newsletter Subscribers(7 contacts found)

New Search | Newsletter Subscribers | Refine Search | Saved Searches

Sort By: Contact Name: A-Z

Contact	Assigned Staff	Last Contacted	Contact Info
Jack Black	John Smith		@
Gary Brown	John Smith		@
Michael Johnson	John Smith		@
Sam Jones	John Smith		@
Samantha Jones	John Smith	10/11/11	@
Mary May	John Smith	19/08/11	@
Charles Roberts	John Smith		@

How do I find my Saved Search in Agentbox?

1. Click on the Contact icon from the main menu
2. Click on Advanced Search from left panel

Contacts

- Fast Find

The system will auto filter your results based on how much info you enter below.

First Name:

Last Name:

Company:

[Advanced Search](#)

- Add a Contact

:: Advanced Contact Search : New Search

New Search | Saved Searches

:: Contact Search ::

First Name: Last Name:

Home Phone: Mobile:

Email: Company:

Address: Suburb:

Custom Filters: [edit](#) No filters created yet.

Subscribe To:

- Auction Reminders
- Newsletters
- OFI Times
- Property Updates
- Sales Results

:: Group Search ::

Sale/Rental:

3. Click on the Saved Searches drop down and select your search

:: Advanced Contact Search : New Search

New Search Saved Searches
Saved Searches
Newsletter Subscribers

:: Contact Search ::

First Name: Last Name:

Home Phone: Mobile:

Email: Company:

Address: Suburb:

Custom Filters: edit No filters created yet.

Subscribe To:

- Auction Reminders
- Newsletters
- OFI Times
- Property Updates
- Sales Results

:: Group Search ::

Sale/Rental:













Search

4. Your Target List will appear on screen

:: Advanced Contact Search : Newsletter Subscribers(7 contacts found)

New Search **Newsletter Subscribers** Refine Search Saved Searches

Sort By:

Contact	Assigned Staff	Last Contacted	Contact Info
Jack Black	John Smith		@ 
Gary Brown	John Smith		@  
Michael Johnson	John Smith		@  
Sam Jones	John Smith		@  
Samantha Jones	John Smith	10/11/11	@  
Mary May	John Smith	19/08/11	@  
Charles Roberts	John Smith		@ 

How do I edit a saved contact search?

1. Open one of your saved searches.

:: Advanced Contact Search : Newsletter Subscribers(7 contacts found)

New Search | **Newsletter Subscribers** | Refine Search | Saved Searches

Sort By: Contact Name: A-Z

Contact	Assigned Staff	Last Contacted	Contact Info
Jack Black	John Smith		@
Gary Brown	John Smith		@
Michael Johnson	John Smith		@
Sam Jones	John Smith		@
Samantha Jones	John Smith	10/11/11	@
Mary May	John Smith	19/08/11	@
Charles Roberts	John Smith		@

2. Click on the Refine Search tab

:: Advanced Contact Search : Newsletter Subscribers

New Search | Newsletter Subscribers | **Refine Search** | Saved Searches

7 record(s) found from last search.

[Remove Saved Search](#)

:: Contact Search ::

First Name: Last Name:

Home Phone: Mobile:

Email: Company:

Address: Suburb:

Custom Filters: [edit](#) No filters created yet.

Subscribe To:

- Auction Reminders
- Newsletters
- OFI Times
- Property Updates
- Sales Results

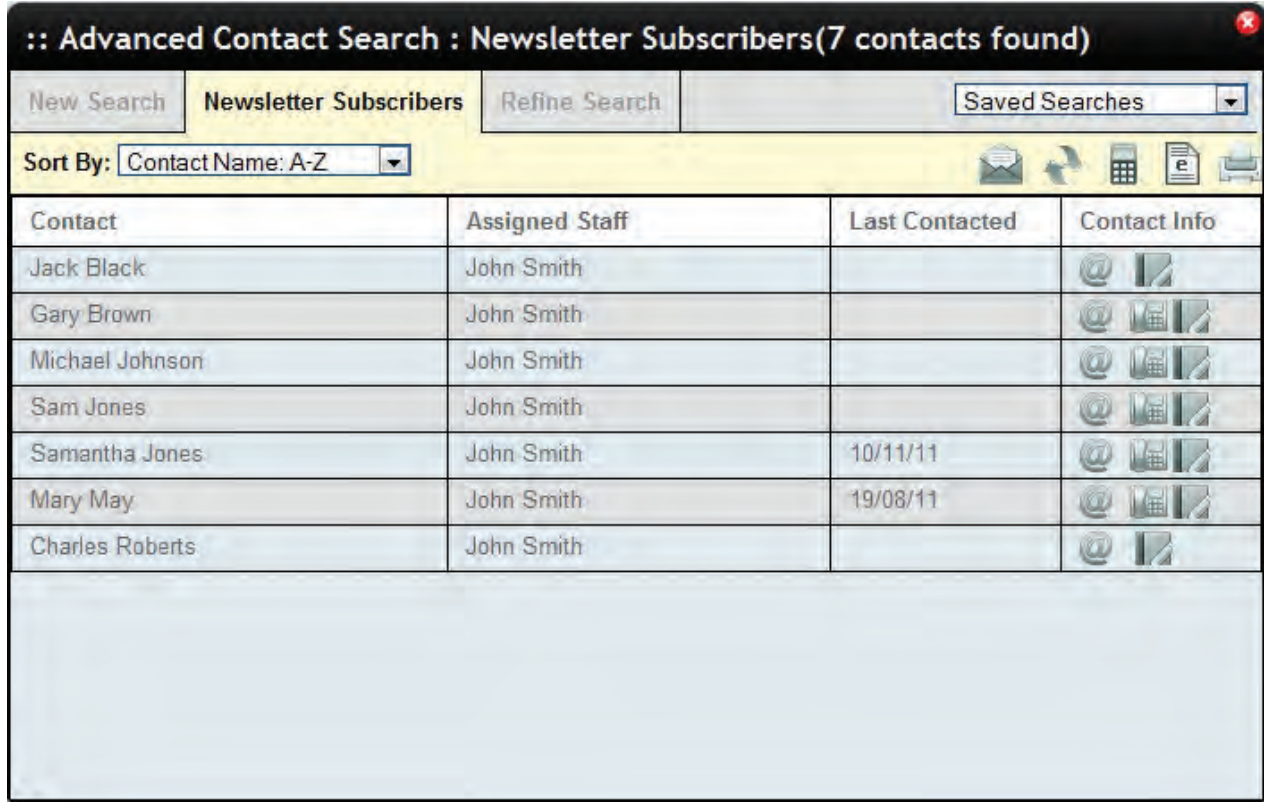
[Search](#)

3. Alter search requirements as you wish

4. Click Search.

How do I remove a saved contact search?

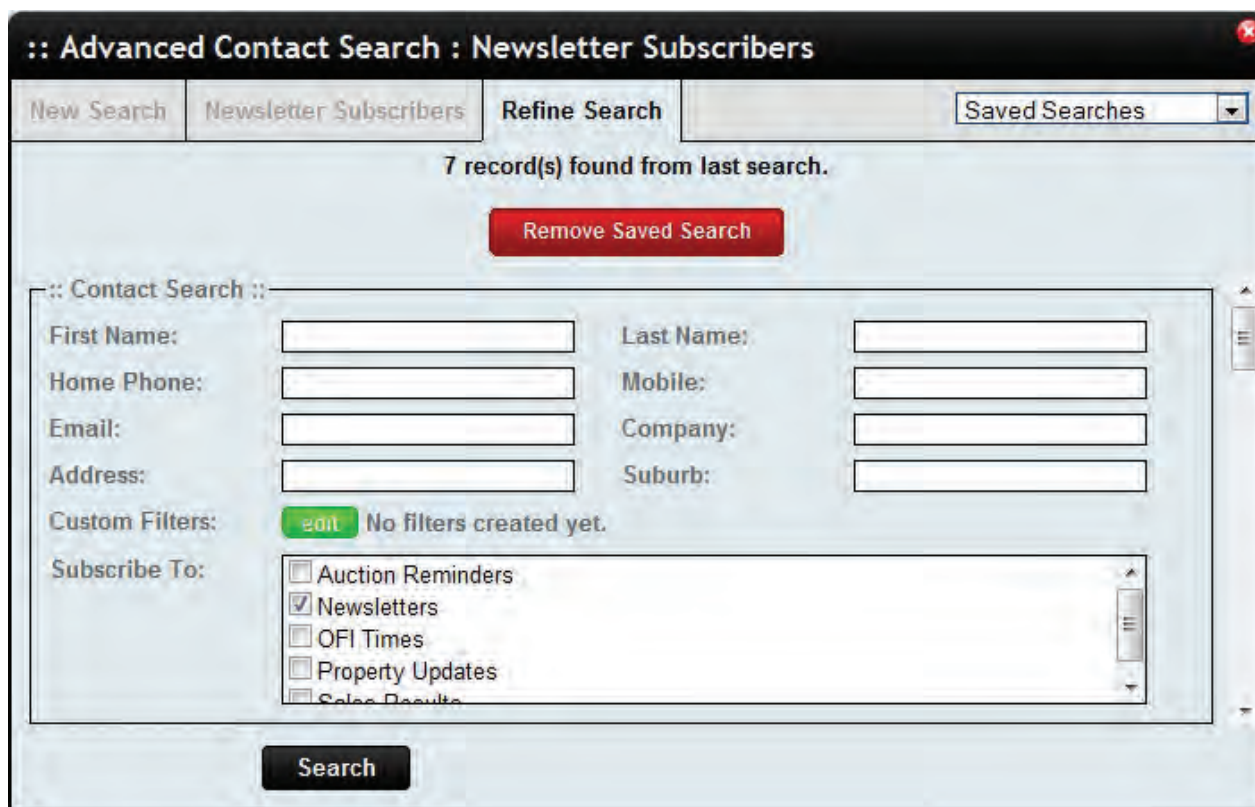
1. Open one of your saved searches.



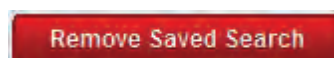
The screenshot shows a software window titled "Advanced Contact Search : Newsletter Subscribers(7 contacts found)". The window has a dark header bar with a close button (red X) in the top right corner. Below the header, there are several tabs: "New Search", "Newsletter Subscribers" (which is the active tab), and "Refine Search". To the right of these tabs is a "Saved Searches" dropdown menu. Below the tabs, there is a "Sort By:" dropdown menu set to "Contact Name: A-Z". To the right of the sort menu are several icons: an envelope, a refresh symbol, a calculator, a document with an 'e', and a printer. The main content area is a table with four columns: "Contact", "Assigned Staff", "Last Contacted", and "Contact Info". The table contains seven rows of data. Below the table is a large, empty light blue rectangular area.

Contact	Assigned Staff	Last Contacted	Contact Info
Jack Black	John Smith		@
Gary Brown	John Smith		@
Michael Johnson	John Smith		@
Sam Jones	John Smith		@
Samantha Jones	John Smith	10/11/11	@
Mary May	John Smith	19/08/11	@
Charles Roberts	John Smith		@

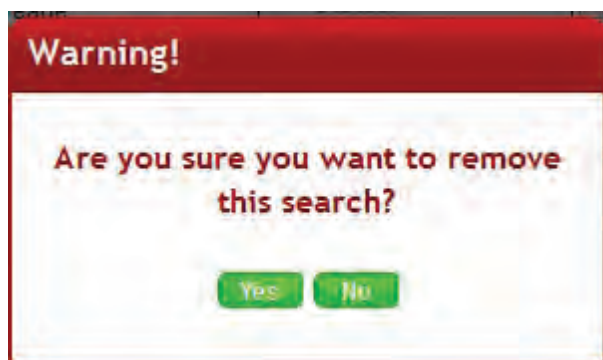
2. Click on the Refine Search tab.



3. Click on the red Remove Saved Search button




4. Click Yes



Print Detailed Contact Report

How do I print a detailed contact report?

1. Complete an [Advanced Contact Search](#) to open your target list of contacts
2. Click on the print icon at the top of the search results 

Contacts

- Fast Find

The system will auto filter your results based on how much info you enter below.

First Name:

Last Name:

Company:





























[Advanced Search](#)

- Add a Contact
- Import CSV

:: Advanced Contact Search : Search Results(33 contacts found)

New Search | Search Results | Refine Search

Sort By: 1 | 2 | »

Contact	Assigned Staff	Last Contacted	Contact Info
Apex Printing	Jane Smith		  
Gary Brown	Jane Smith		  
Jennifer Brown	Jane Smith		  
Julia Burn	Jane Smith	14/02/12 (letter)	  
Nick Citizen	Jane Smith		 
Harry Crane	Jane Smith		  
Colin Fairlight	Marcus Thompson		  
Kim French	Jane Smith		 
Kate Green	Jane Smith		 
Maria Hook	Jane Smith		  
Max Hook	Jane Smith		  

- Your detailed listings report will open in a new tab or window and contains the contact name, details including contact classes, company name and status, contact address, phone numbers and email, related contacts, related properties, requirements and last 3 notes.

Printed by: Office Admin
Print Date: 17 Apr 2012

Contact report is ready for printing

Detailed Contact Report

Name	Details	Contact	Related Contacts	Related Properties	Requirements	Notes
	Status: Active, Business Company: Apex Printing Contact Classes: Supplier, Business	(M): 02 9234 7654 (E): ap@printing.com (Address): 243 Liverpool St, Australia (Postal): Australia				Assigned Staff: Jane Smith First Created: 01 Dec 2011 Last Modified: 01 Dec 2011
Mr. Gary Brown	Status: Active, Person Contact Classes: Buyer, Vendor, Purchaser	(M): 0456 231 528 (E): gary.brown@gmail.com (Address): 17 Transmere Street, Gosford, Australia, 2260 (Postal): Australia		Vendor: #1P0000 - Level 1, Unit 1/12 Norton Street, Coobera (Office) Listing Agent: Jane Smith Buyer: #1P0003 - 52 Elizabeth Street, Sunny Hills (Exchanged) 2011-10-20) Listing Agent: Jane Smith; Appraisal Agent: Jane Smith; Selling Agent: Jane Smith	For Sale: Residential (Acreage): Apartment, Block Of Units, House, Land, Semi-Duplex, Studio, Terrace, Townhouse, Unit, Villa) Suburb: Sunny Hills	Assigned Staff: Jane Smith First Created: 20 Oct 2011 Last Modified: 18 Apr 2012
Jennifer Brown	Status: Active, Person Contact Classes: Buyer	(M): 0455 222 565 (E): jbrown@agentbox.com.au			For Sale: Residential (House) Suburb: Coobera Price: \$1,080,000 - \$1,320,000 Bed: 3+ Bath: 4+ Park: 2+	Assigned Staff: Jane Smith First Created: 05 Nov 2011 Last Modified: 12 Apr 2012
Julia Burn	Status: Active, Person Company: J.D. Lawyers Contact Classes: Solicitor, Buyer, Solicitor	(M): 0400 000 123 (M): 02 9150 800 (E): jdb@gmail.com (Address): 2 Pitt St, Sydney, Australia, 2000 (Postal): Australia		Buyer Solicitor: #1P0003 - 52 Elizabeth Street, Sunny Hills (Exchanged) (2011-10-20) Listing Agent: Jane Smith; Appraisal Agent: Jane Smith; Selling Agent: Jane Smith Buyer Solicitor: #1P0001 - 1 Jones Street, Coobera (Available) 15-01-2012) Listing Agent: Jane Smith; Selling Agent: Jane Smith		Assigned Staff: Jane Smith First Created: 01 Dec 2011 Last Modified: 01 Dec 2011 Last Contacted: 14/02/12 (letter)

Subscribe Contacts

How to Subscribe Contacts to E-Newsletters?

1. [Search for your Contact](#) and open their [Contact Card](#)

:: Contact : Mary May

Full View

Contact Card Requirements

Status: * Active

:: Contact 1 ::

Title: Miss Home Phone: 02 9209 4174

Salutation: Work Phone: 02 9523 5642

First Name: * Mary Mobile: 0411 222 555

Last Name: * May Facsimile: 02 9209 4175

Email: mm@hotmail.com Company:

Residential Address: 1 Miles Road

Suburb: Camperdown State: NSW

Postcode: 2050 Country: Australia

Postal Address: * Check if postal address is different to residential address

Contact Method: Email Anniv Date: 0 0

Add Related Contact Add Related Property Setup Letter Head

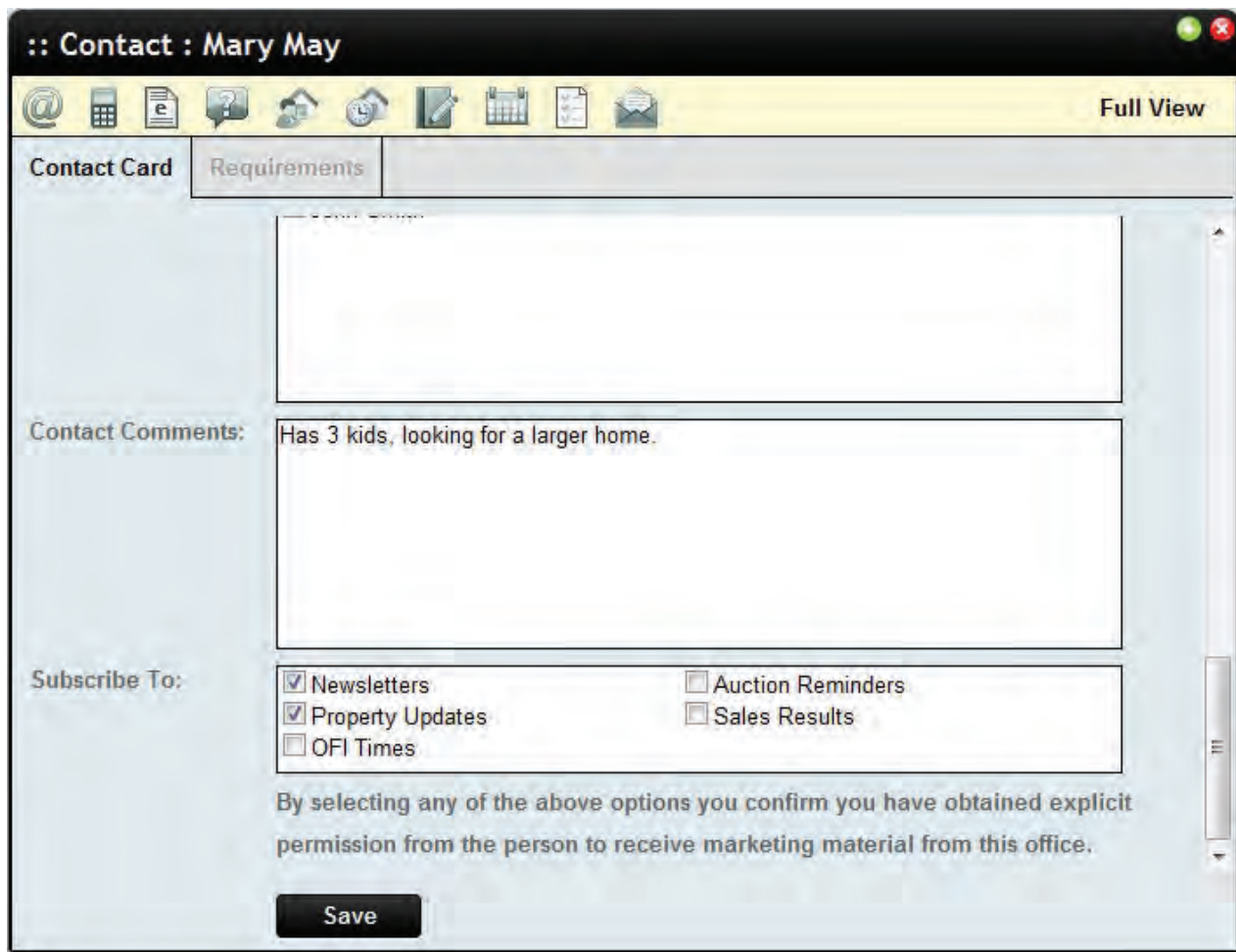
Save

2. At the bottom of the Main Contact card you can subscribe the contact to a number of subscription categories by ticking their corresponding check box.

**Note: Only contacts that have the corresponding check box ticked on their contact card will be sent an E-Newsletter when sending a bulk e-newsletter via the Advanced Contact Search.*

- **Newsletters** - Newsletters will add the contact to the subscribers recipient list to all manually created mass e-newsletter blasts. This is the contacts consent to send bulk e-newsletters to them. To send an e-newsletter conduct an [Advanced contact search](#) for subscribers, then [generate and send an e-newsletter](#)
- **Property Updates** - If a contact is subscribed to Property Updates they will automatically receive an E-Newsletter containing new or updated properties that match their requirements. These are sent once a day and will only be sent if a new property has been made Available or a matching property has been updated that day.
- The **OFI Times, Auction Reminders and Sales Results** check boxes are used as subscriber search sorters to help you easily generate a target list of contacts. The contact will also need to be subscribed to Newsletters. These newsletters are to be created manually (this may differ depending on your office set up). Conduct an [Advanced contact search](#) for subscribers, then [generate and send an e-newsletter](#)

**Note: By selecting any of the above options you confirm you have obtained explicit permission from the person to receive marketing material from your office.*



3. Click Save

Add Buyer/Tenant Requirements

How do I add Buyer/Tenant Requirements?

1. [Search for your Contact](#) and open their [Contact Card](#)

:: Contact : Mary May Full View

@ Calculator Document Help Home Mail Calendar Lists Mail

Contact Card | Requirements | Related Properties (1)

Status: *

:: Contact 1 ::

Title:	<input type="text" value="Miss"/>	Home Phone:	<input type="text" value="02 9209 4174"/>
Salutation:	<input type="text"/>	Work Phone:	<input type="text" value="02 9523 5642"/>
First Name: *	<input type="text" value="Mary"/>	Mobile:	<input type="text" value="0411 222 555"/>
Last Name: *	<input type="text" value="May"/>	Facsimile:	<input type="text" value="02 9209 4175"/>
Email:	<input type="text" value="mm@hotmail.com"/>	Company:	<input type="text"/>
Residential Address:	<input type="text" value="1 Miles Road"/>		
Suburb:	<input type="text" value="Camperdown"/>	State:	<input type="text" value="NSW"/>
Postcode:	<input type="text" value="2050"/>	Country:	<input type="text" value="Australia"/>
Postal Address:	<input type="checkbox"/> * Check if postal address is different to residential address		
Contact Method:	<input type="text" value="Email"/>	Anniv Date:	<input type="text" value="0"/> <input type="text" value="0"/> <input type="text" value=""/>

2. Click on the Requirements tab

:: Contact : Mary May : New Requirement

Full View

Contact Card Requirements Related Properties (1)

Sale/Rental: For Sale

Type: Residential

Category: *

- Acreage
- Apartment
- Block Of Units
- House
- Land

Price From: To:

Bedrooms From: To:

Bathrooms From: To:

Parking From: To:

State: NSW

Select a Suburb(s):

Selected Suburbs:

Include surrounding suburbs?

3. Enter Requirements (For Example Mary would like to receive property alerts on all 3 bedroom houses in Copacobana under \$1,400,000)

- * Sale/Rental: For Sale, For Lease
- * Type: Residential, Rural, Commercial, Holiday, Business
- * Category: **Note: List of categories depends on the Property Type.*
- * Price, Bedrooms, Bathrooms, Parking
- * State: ACT, NSW, NT, QLD, SA, TAS, VIC, WA (Select the State to refine the search for the relevant suburbs or regions)
- * Suburb(s)
- * Regions: e.g Northern Suburbs, Western Suburbs
- * Notes

:: Contact : Mary May

Full View

Contact Card Requirements Related Properties (1)

Sale/Rental: For Sale

Type: Residential

Category: *

- Acreage
- Apartment
- Block Of Units
- House
- Lead

Price From: To: 1400000

Bedrooms From: 3 To:

Bathrooms From: 1 To:

Parking From: 1 To:

State: NSW

Select a Suburb(s):

Selected Suburbs:

- Copacabana

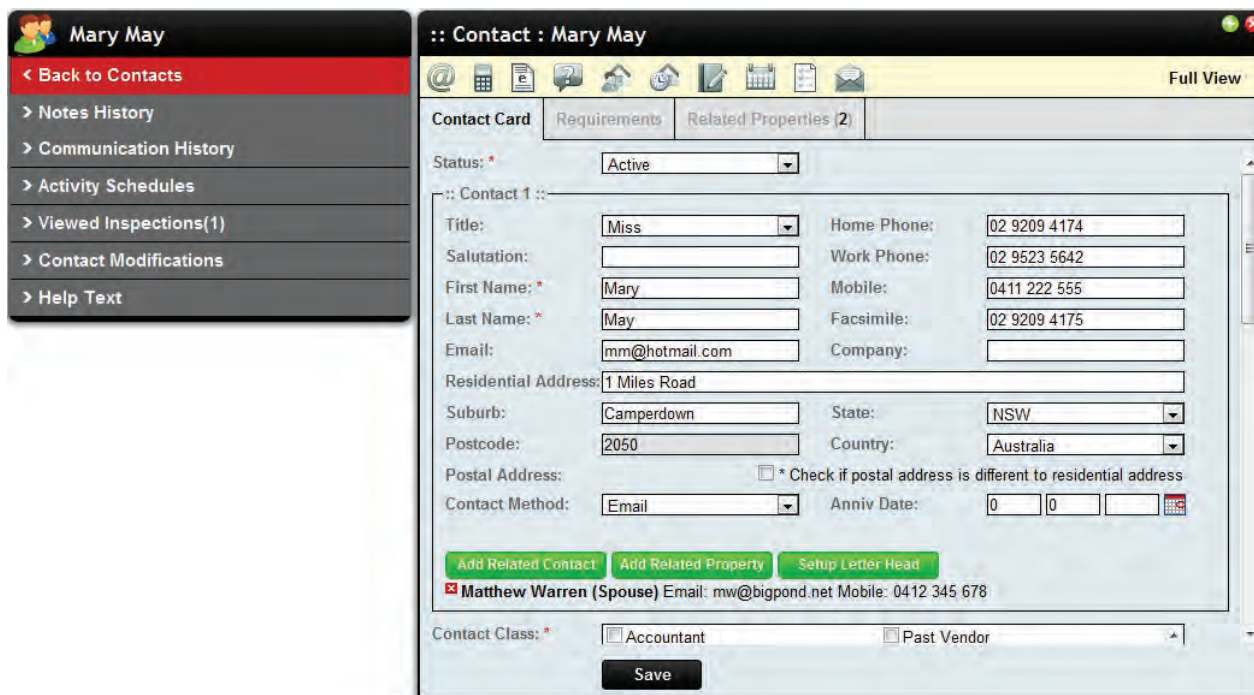
Include surrounding suburbs?

4. Click Save

View Contact Inspections

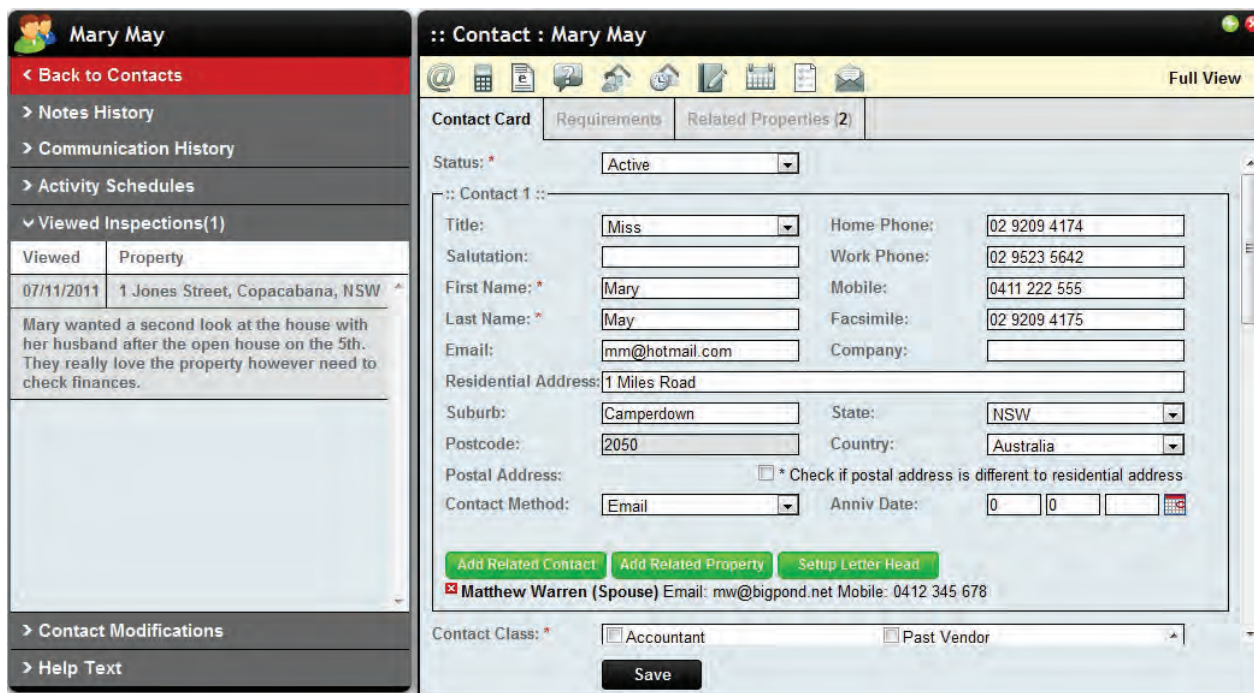
How do I view properties a contact has inspected?

1. [Search for your Contact](#) and open their [Contact Card](#)



2. On the left panel click Viewed Inspections (If the matching left panel is not visible, click Full View in the top right hand corner of the contact card).

3. You will see a list of properties they have inspected and their comments.



4. You can click on a comment to edit the feedback. This will also edit the feedback logged against the property.

Inspection Feedback

Add Feedback (1) Other Feedback

1 Jones Street, Copacabana
07/12/2011 10:00am - 10:30am

Contact:

Price Feedback \$:

Contract Taken

Comments:

You may also like...

[How do I log feedback from an 'Inspection by appointment'?](#)

[How do I log buyer/tenant feedback](#)

[How do I view all feedback for a property?](#)

Email Contact

How do I send an email to a Contact in Agentbox?

1. [Search for your Contact](#) and open their [Contact Card](#)

:: Contact : Mary May

@ Full View

Contact Card Requirements

Status: * Active

:: Contact 1 ::

Title: Miss Home Phone: 02 9209 4174

Salutation: Work Phone: 02 9523 5642

First Name: * Mary Mobile: 0411 222 555

Last Name: * May Facsimile: 02 9209 4175

Email: mm@hotmail.com Company:

Residential Address: 1 Miles Road

Suburb: Camperdown State: NSW

Postcode: 2050 Country: Australia

Save

2. Click on Send an Email action icon @
3. Enter Subject and Message

Email Contact : Mary May

Create New Email View Sent Email

Reply To: John Smith (john@agentbox.com.au)

Send To: * Mary May (mm@hotmail.com)

Subject: *

Message: *

B I U Paragraph

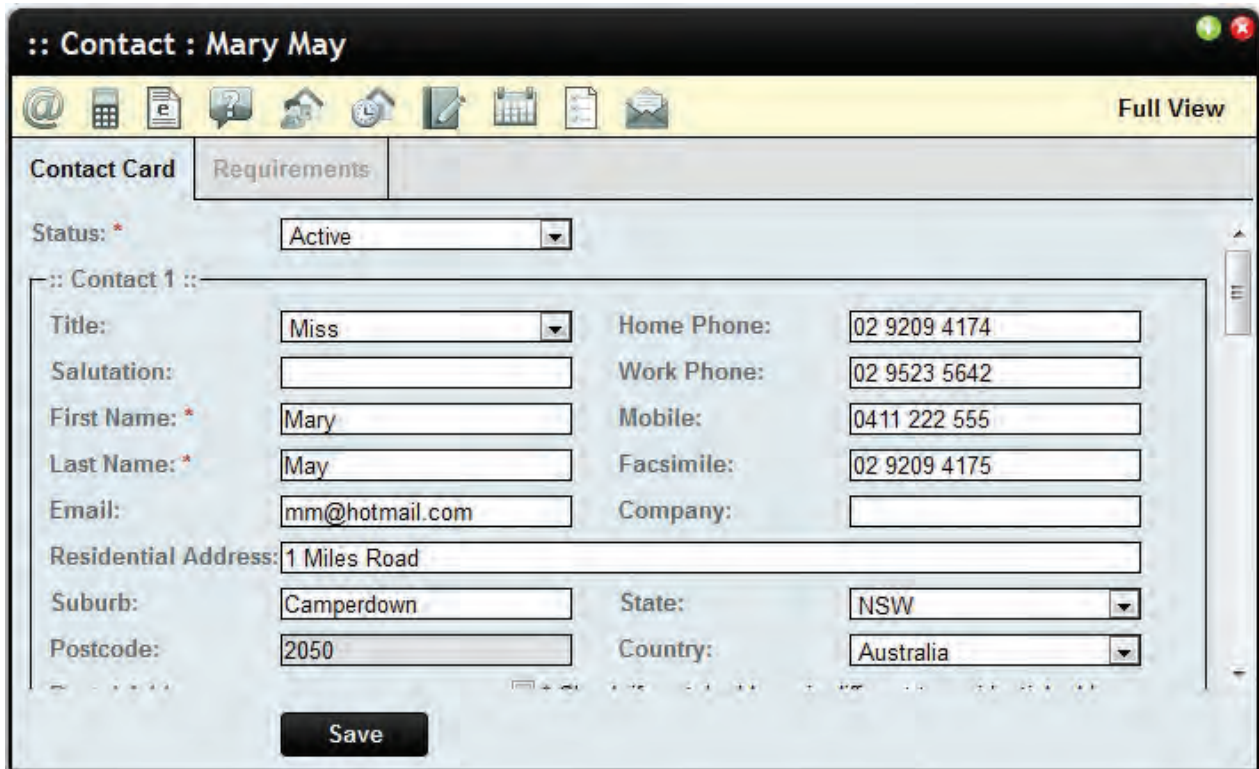
Send

4. Click on Send

SMS Contact

How do I send an SMS to a Contact in Agentbox?


1. [Search for your Contact](#) and open their contact card

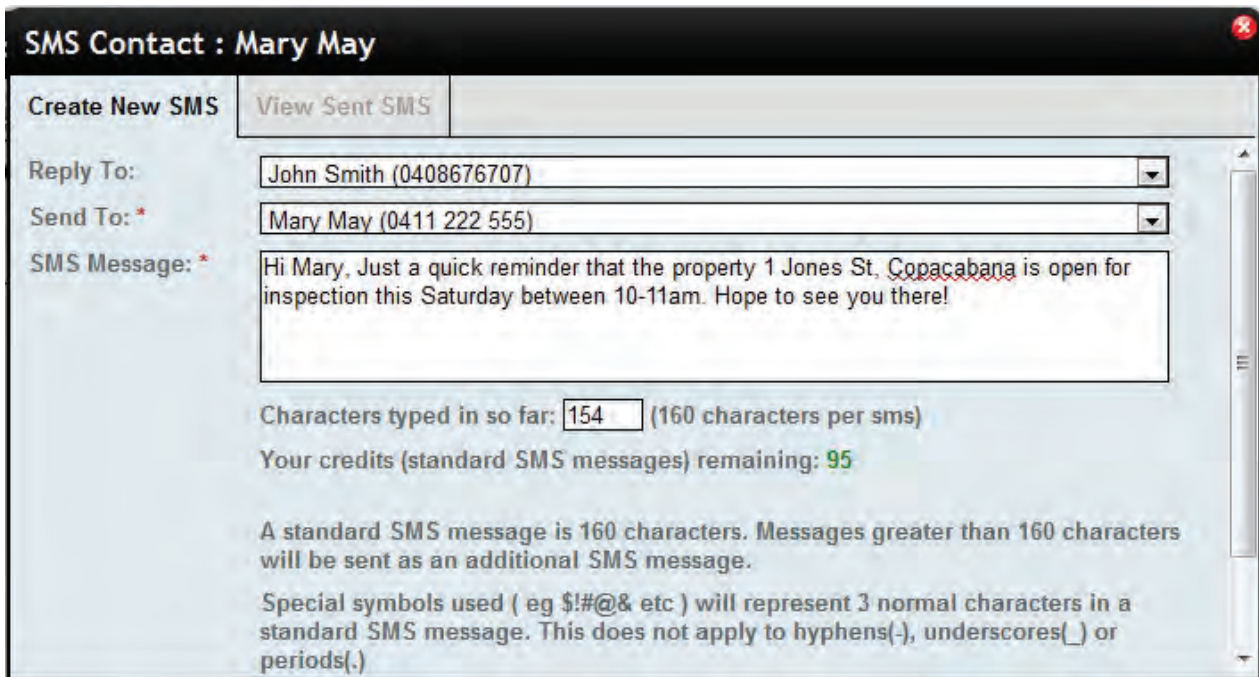


The screenshot shows the 'Contact Card' for 'Mary May'. The status is 'Active'. The contact details are as follows:

Title:	Miss	Home Phone:	02 9209 4174
Salutation:		Work Phone:	02 9523 5642
First Name: *	Mary	Mobile:	0411 222 555
Last Name: *	May	Facsimile:	02 9209 4175
Email:	mm@hotmail.com	Company:	
Residential Address:	1 Miles Road		
Suburb:	Camperdown	State:	NSW
Postcode:	2050	Country:	Australia

A 'Save' button is located at the bottom of the contact card.

2. Click on the SMS icon 
3. Enter SMS Message



The screenshot shows the 'SMS Contact' form for 'Mary May'. The form is titled 'SMS Contact : Mary May' and has two tabs: 'Create New SMS' (selected) and 'View Sent SMS'.

Reply To: John Smith (0408676707)

Send To: * Mary May (0411 222 555)

SMS Message: *
Hi Mary, Just a quick reminder that the property 1 Jones St, Copacabana is open for inspection this Saturday between 10-11am. Hope to see you there!

Characters typed in so far: 154 (160 characters per sms)

Your credits (standard SMS messages) remaining: 95

A standard SMS message is 160 characters. Messages greater than 160 characters will be sent as an additional SMS message.

Special symbols used (eg \$!#@& etc) will represent 3 normal characters in a standard SMS message. This does not apply to hyphens(-), underscores(_) or periods(.)

SMS Contact : Mary May

Create New SMS | View Sent SMS

SMS Message: *
 Hi Mary, Just a quick reminder that the property 1 Jones St, Copacabana is open for inspection this Saturday between 10-11am. Hope to see you there!

Characters typed in so far: 154 (160 characters per sms)
 Your credits (standard SMS messages) remaining: 95

A standard SMS message is 160 characters. Messages greater than 160 characters will be sent as an additional SMS message.
 Special symbols used (eg \$!#@& etc) will represent 3 normal characters in a standard SMS message. This does not apply to hyphens(-), underscores(_) or periods(.)

Send

4. Click on Send

E-Newsletter

How do I send an E-Newsletter to a Contact?

1. [Search for your Contact](#) and open their [Contact Card](#)

:: Contact : Mary May

@ | Calculator | E-Newsletter | Home | Calendar | Documents | Mail

Contact Card | Requirements | Full View

Status: * Active

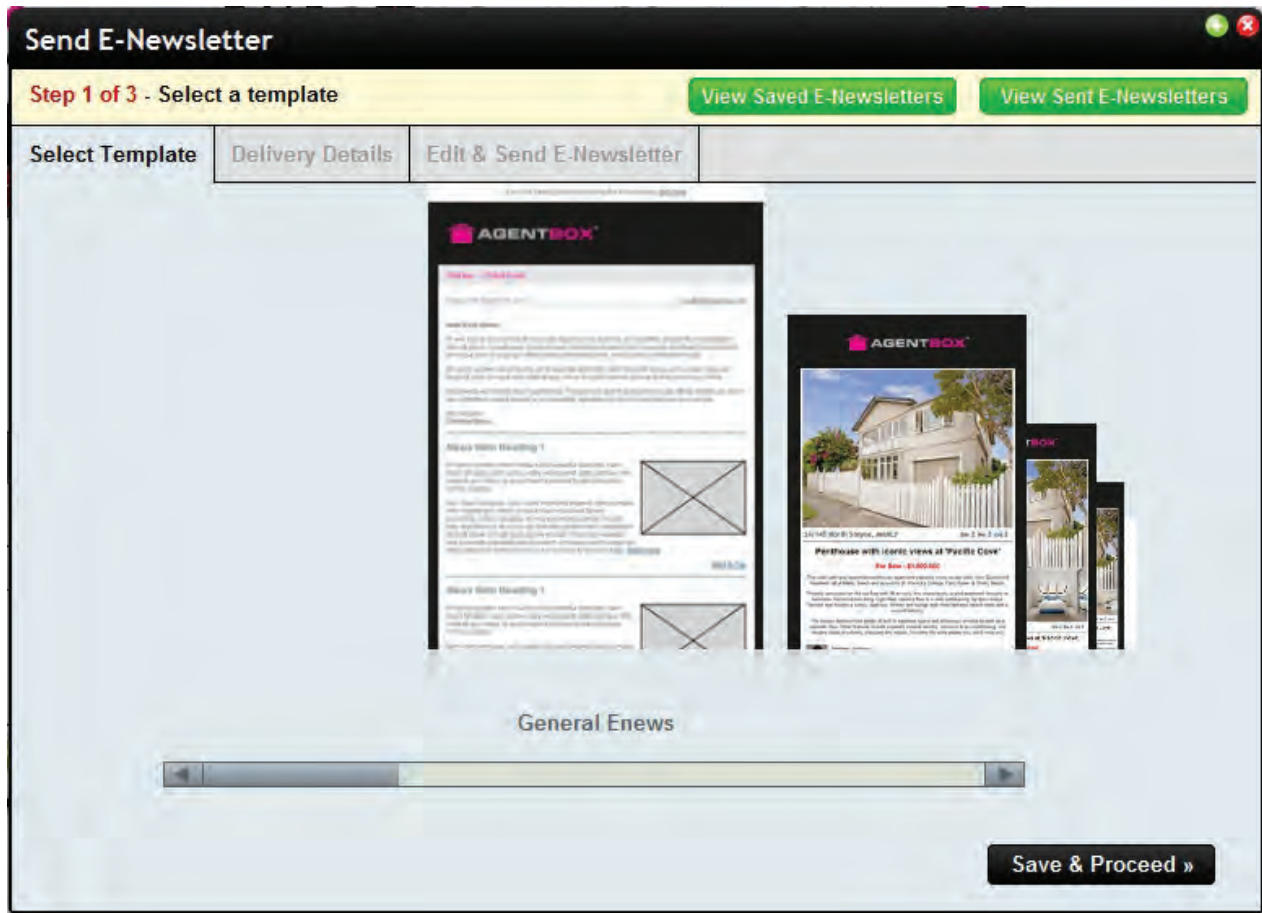
:: Contact 1 ::

Title:	Miss	Home Phone:	02 9209 4174
Salutation:		Work Phone:	02 9523 5642
First Name: *	Mary	Mobile:	0411 222 555
Last Name: *	May	Facsimile:	02 9209 4175
Email:	mm@hotmail.com	Company:	
Residential Address:	1 Miles Road		
Suburb:	Camperdown	State:	NSW
Postcode:	2050	Country:	Australia

Save

2. Click on the E-Newsletter Action icon 

3. Select a template



4. Add Recipient. **Note: you can only search and add additional contacts if it has an email address and is subscribed to receive 'Newsletters'.*

5. Enter the E-Newsletter Subject.

Send E-Newsletter

Step 2 of 3 - Edit your delivery details [View Saved E-Newsletters](#) [View Sent E-Newsletters](#)

Select Template | **Delivery Details** | Edit & Send E-Newsletter

Add Recipient: [Add](#)

Delivery To:

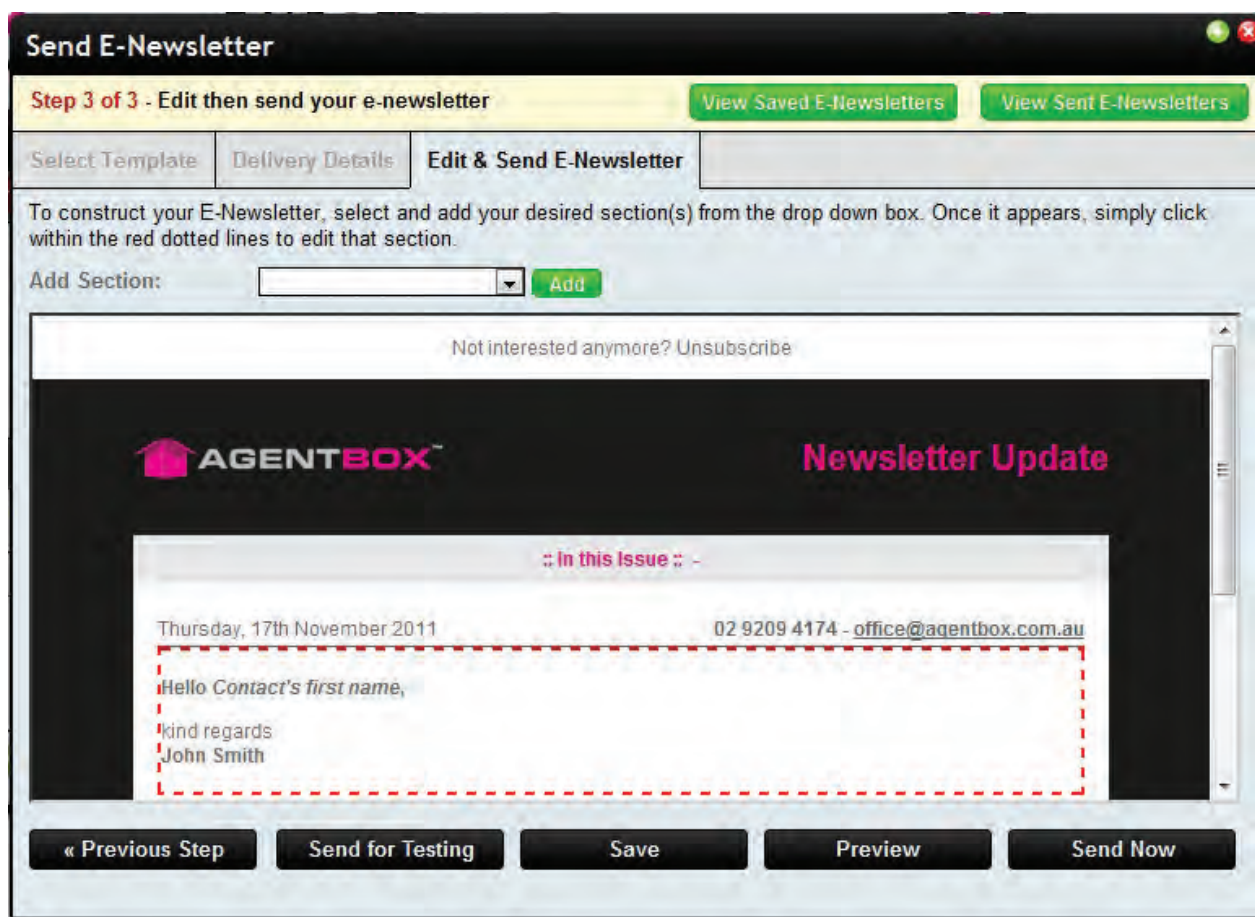
- Mary Jones
- Mary May mm@hotmail.com
- [Add New Contact...](#)

Reply From:

Subject: *

[« Previous Step](#) [Save & Proceed »](#)

6. [Create E-Newsletter](#)



7. Once you are satisfied with your E-Newsletter after a final Preview, you may send a test copy to yourself via the Send for Testing button or send to the recipients using the Send Now button.

**Note: Send for Testing button will send a copy to the email address you have used to log in.*

Log a Contact Enquiry

How do I Log an enquiry from a Contact in Agentbox?

The Log an Enquiry tool does the following:

- * Logs an enquiry against the Property's Recent Enquiries history
- * Creates a task and sends an email to the assigned staff member to action
- * Comments appear on the Vendor Report

1. [Search for your Contact](#) and open their [Contact Card](#)

:: Contact : Mary May

Full View

@ Calculator Document ? Home Clock Notepad Calendar Mail


Contact Card Requirements

Status: * Active

:: Contact 1 ::

Title:	Miss	Home Phone:	02 9209 4174
Salutation:		Work Phone:	02 9523 5642
First Name: *	Mary	Mobile:	0411 222 555
Last Name: *	May	Facsimile:	02 9209 4175
Email:	mm@hotmail.com	Company:	
Residential Address:	1 Miles Road		
Suburb:	Camperdown	State:	NSW
Postcode:	2050	Country:	Australia

Save

2. Click on Log an Enquiry action icon 
3. Enter Enquiry Type, Select Property, Description of Enquiry and Assign Staff

:: Log Enquiry : Mary May

Enquiry Type:

Select Property:

Enquiry Date:

Description: *

Assign to Staff: *

- Office Admin
- Joe Franks
- John Smith
- Jane Thomas

SMS Reminder: Insufficient SMS credits

4. Click on Submit

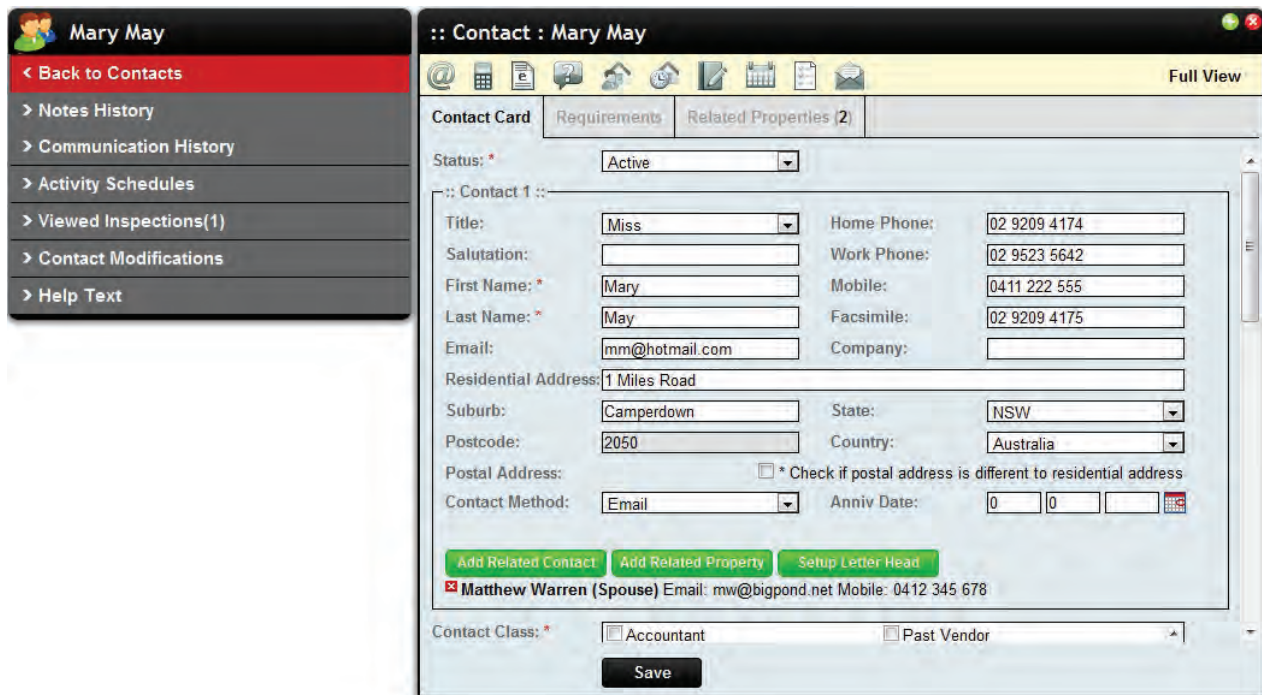
See also

[Communication History](#)

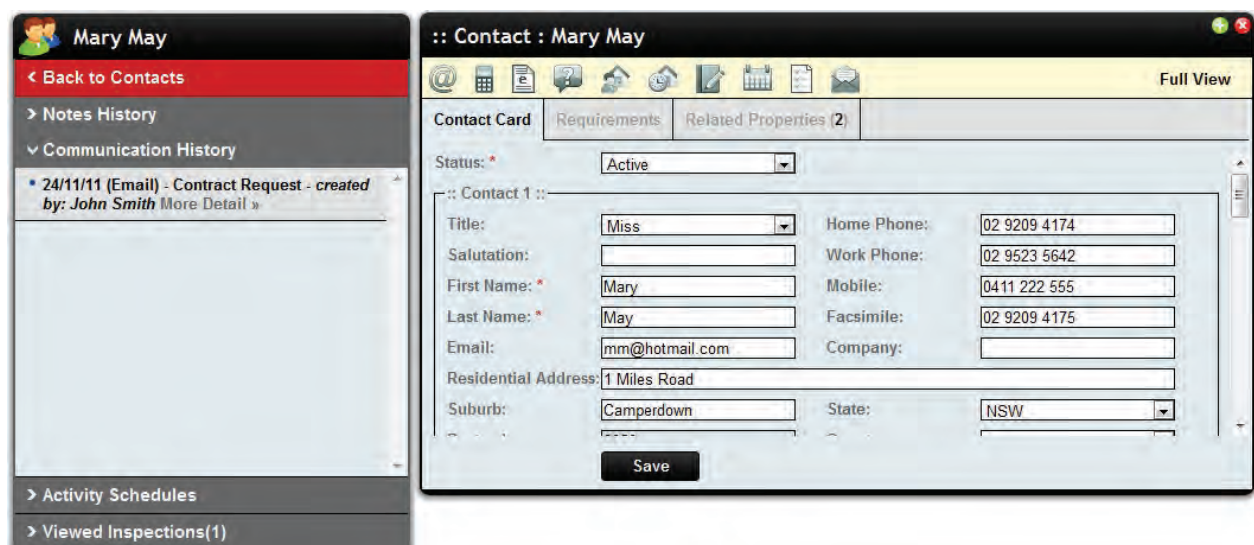
Communication History

View Communication History

1. [Search for your Contact](#) and open their [Contact Card](#)



2. On the left panel click Communication History (If the matching left panel is not visible, click Full View in the top right hand corner of the contact card).

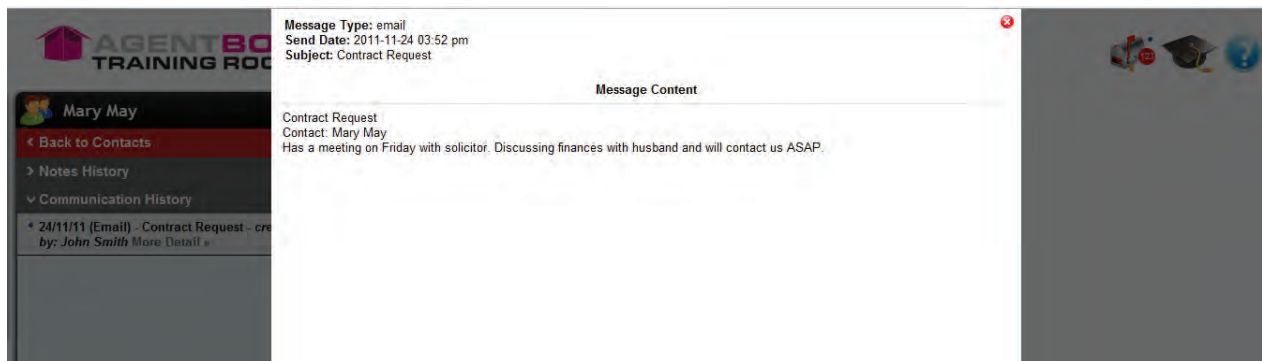


3. You will see a list of emails, e-newsletters and sms, and logged enquiries relating to the contact. Click More Detail to open the entry.

Message Type: - The method of sending the enquiry to the assigned agent

Send Date: The date of sending the enquiry to the assigned agent

Subject: The subject line of the message or the functionality in the system in this example this is the email sent to the agent from a logged contract request.



Inspections by Appointment

How do I log feedback from Inspections by Appointment?

1. [Search for your Contact](#) and open their [Contact Card](#)

The screenshot shows a 'Contact Card' for 'Mary May' in a software application. The card is titled 'Contact : Mary May' and has a 'Full View' button. It contains the following information:

- Status: Active (dropdown menu)
- Contact 1 details:
 - Title: Miss (dropdown menu)
 - Salutation: (empty field)
 - First Name: Mary
 - Last Name: May
 - Email: mm@hotmail.com
 - Residential Address: 1 Miles Road
 - Suburb: Camperdown
 - Postcode: 2050
 - Home Phone: 02 9209 4174
 - Work Phone: 02 9523 5642
 - Mobile: 0411 222 555
 - Facsimile: 02 9209 4175
 - Company: (empty field)
 - State: NSW (dropdown menu)
 - Country: Australia (dropdown menu)
- A 'Save' button is located at the bottom of the card.

2. Click on the Add Feedback by Appointment action icon 

3. Enter the date and time of the inspection

Inspection By Appointment

Inspection Date:* 07 11 2011

From: 10 00 AM

To: 10 30 AM

Save Cancel

4. The right panel will open

- o Type the property address or ID and select from the drop down results
- o Enter the comments
- o select Save & Add Another or Save & View Property

Inspection Feedback

Add Feedback (1) Other Feedback

1 Jones Street, Copacabana
07/11/2011 10:00am - 10:30am

Contact: Mary May

Price Feedback \$: 1150000

Contract Taken Hot

Comments:
Mary wanted a second look at the house with her husband after the open house on the 5th. They really love the property however need to check finances.

Save & Add Another Save & View Contact

5. Once you have logged all appointments, close the right panel using the red cross.

Add a Meeting to a Contact


How do I Add a Meeting for a Contact in Agentbox?

1. [Search for your Contact](#) and open their [Contact Card](#)

The screenshot shows a web application window titled "Contact : Mary May". The window has a toolbar with various icons and a "Full View" button. Below the toolbar, there are two tabs: "Contact Card" (selected) and "Requirements". The "Contact Card" tab contains a form with the following fields:

Status: *	Active	Home Phone:	02 9209 4174
Title:	Miss	Work Phone:	02 9523 5642
Salutation:		Mobile:	0411 222 555
First Name: *	Mary	Facsimile:	02 9209 4175
Last Name: *	May	Company:	
Email:	mm@hotmail.com	Residential Address:	1 Miles Road
Suburb:	Camperdown	State:	NSW
Postcode:	2050	Country:	Australia

At the bottom of the form, there is a "Save" button.

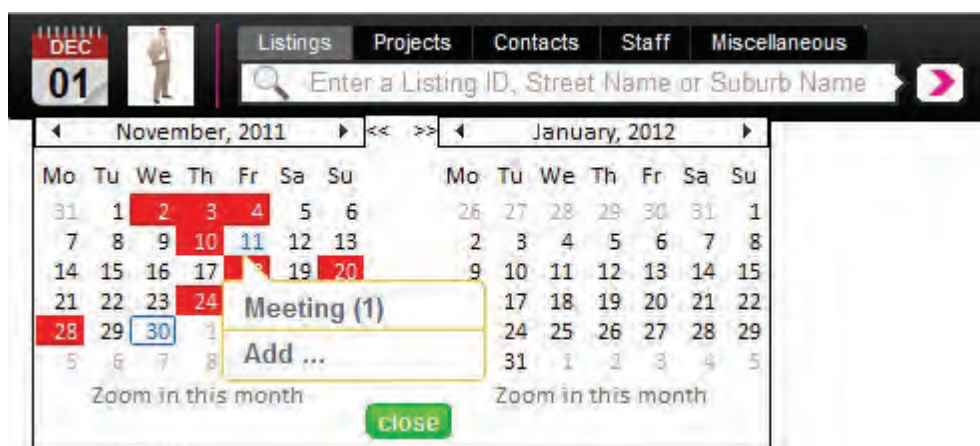
2. Click on Add a Meeting action icon 
3. Enter Meeting time, Heading, Description, Staff and assign Property (if applicable)

:: Contact : Mary May : Add a Meeting

Meeting Starts: * 11 / 11 / 2011 11 : 30 AM
 Meeting End: 11 / 11 / 2011 12 : 00 PM
 Headline: * Hot Buyer Meeting to Discuss Exchange
 Description: * Meeting to discuss possible exchange after discussing finances with husband.
 Responsible Staff: * Office Admin Joe Franks John Smith Jane Thomas Melanie Thompson
 SMS Reminder: Tick here if you want to send SMS reminder to staff member(s).
 Assign Property:

4. Click on Save

The meeting will be added to your Agentbox calendar and a notification email will be sent to the assigned staff.



Match Properties

How do I match Properties to a Contact in Agentbox?


There are two ways you can match Properties to a Contact in Agentbox:

- Through a Contact card
- Through the Fast Finds Results Panel

Contact Card

1. [Search for your Contact](#) and open their [Contact Card](#)


:: Contact : Mary May Full View




Contact Card | Requirements

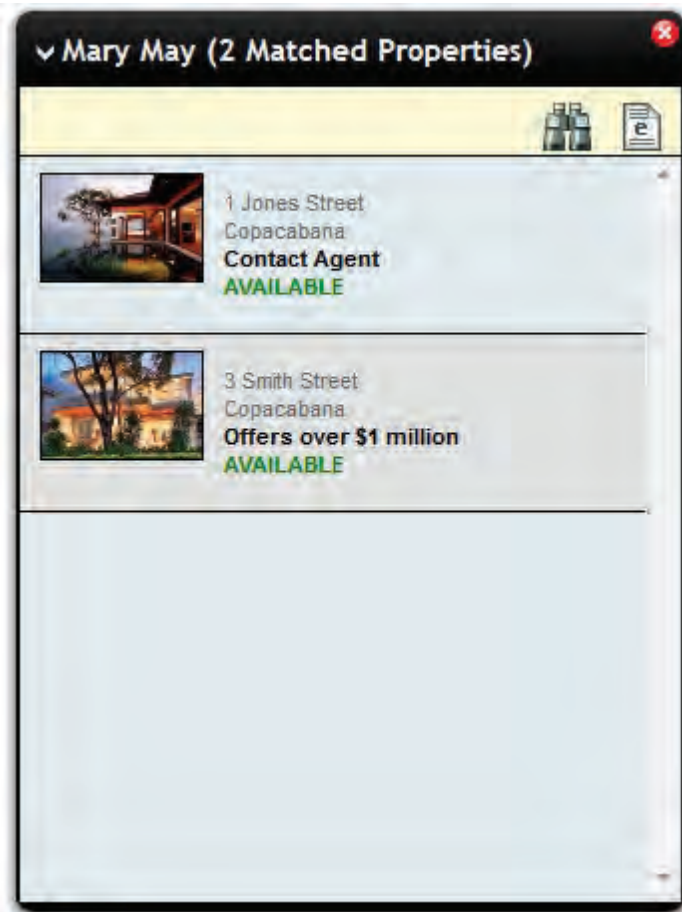
Status: *


:: Contact 1 ::

Title:	<input type="text" value="Miss"/>	Home Phone:	<input type="text" value="02 9209 4174"/>
Salutation:	<input type="text"/>	Work Phone:	<input type="text" value="02 9523 5642"/>
First Name: *	<input type="text" value="Mary"/>	Mobile:	<input type="text" value="0411 222 555"/>
Last Name: *	<input type="text" value="May"/>	Facsimile:	<input type="text" value="02 9209 4175"/>
Email:	<input type="text" value="mm@hotmail.com"/>	Company:	<input type="text"/>
Residential Address:	<input type="text" value="1 Miles Road"/>		
Suburb:	<input type="text" value="Camperdown"/>	State:	<input type="text" value="NSW"/>
Postcode:	<input type="text" value="2050"/>	Country:	<input type="text" value="Australia"/>
Postal Address:	<input type="checkbox"/> * Check if postal address is different to residential address		
Contact Method:	<input type="text" value="Email"/>	Anniv Date:	<input type="text" value="0"/> <input type="text" value="0"/> <input type="text"/> 

2. Click on the Match Properties to this Contact action icon 

3. A list of properties that match the contact's requirements will open in the right panel



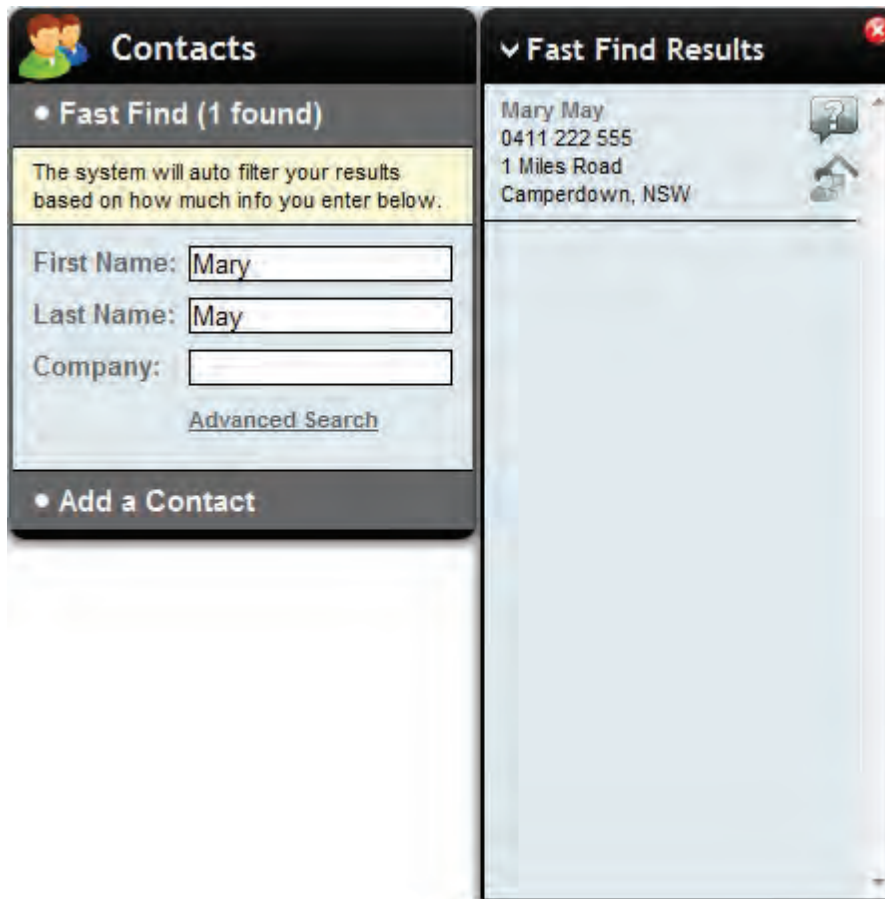
-  You can preview the Property Alert email that will be sent to them that night containing their matched properties (if any) that have had a price change, status change or new listings matching their requirement. If the template does not load, the contact is not scheduled to receive any alerts that day.

Fast Finds Results Panel

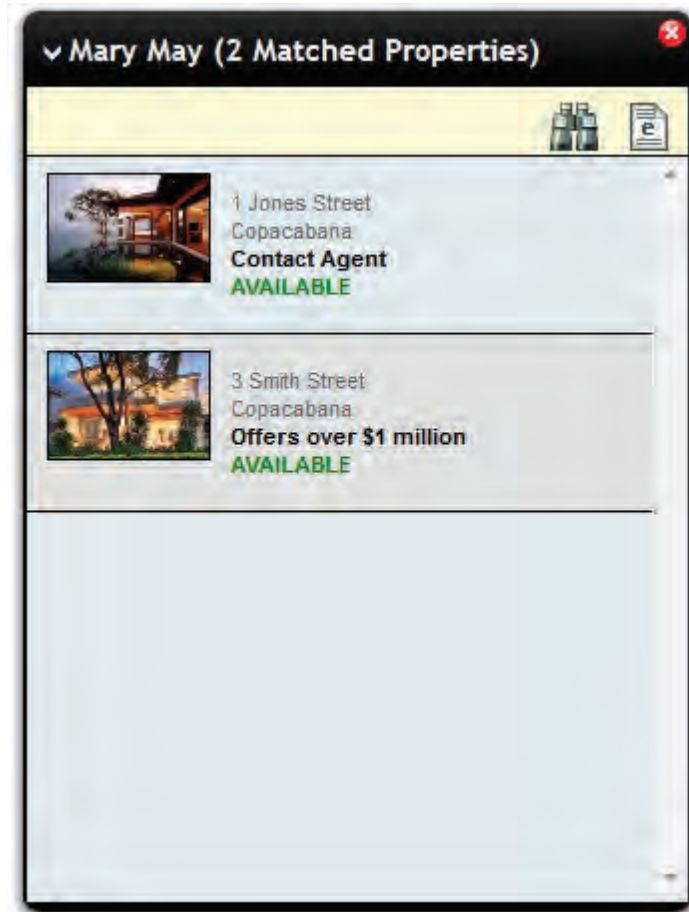
- Click on Contacts from the main menu



- Search for your Contact on the Fast Find Left Panel
- Click on 'Match properties to this contact' action icon from the Fast Find Results Panel




4. A List of properties that match the contact's requirements will open in a panel in the right panel





How do I send my Contact an E-Newsletter containing their matched Properties in Agentbox?


1. Follow the steps on How do I Match Properties to a Contact in Agentbox above.

2. Click on the Send E Newsletter action icon  and create an E-Newsletter using the General E-News template.

**Note: If subscribed to 'Property Updates', the contact will automatically receive their matched properties when they are first listed or have had a price change.*

▼ Mary May (2 Matched Properties)
✕

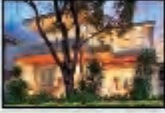





1 Jones Street
Copacabana

Contact Agent


AVAILABLE



3 Smith Street
Copacabana

Offers over \$1 million

AVAILABLE

**Note: If you click on the Preview action icon  you will be shown a preview of the automatic Property Update that will be sent to the contact that day. You will be only shown a preview if one or more of the contact's matched properties is new or has had a price change that day.*

Property Alert

Thursday, 5th April 2012

Hello Mary,

The following listings matched your Property Alert search requirements.

Matched Listings



COPACABANA 1 Jones Street
Contact Agent

bed 3 | bath 4 | park 2

Luxury Balinese Inspired Residence

[view property »](#)



COPACABANA 3 Smith Street
Offers over \$1 million

bed 3 | bath 2 | park 2

"Casa Belle" - An Iconic Luxury Beach Home

[view property »](#)

4 Cornwallis Street, Eveleigh NSW 2015
P: 02 9209 4174 | F: 02 9310 7232 | E: office@agentbox.com.au

© 2012 - Agentbox

The sender believes that this E-mail and any attachments were free of any virus, worm, Trojan horse, and/or malicious code when sent. This message and its attachments could have been infected during transmission. By reading the message and opening any attachments, the recipient accepts full responsibility for taking protective and remedial action about viruses and other defects. The sender's employer is not liable for any loss or damage arising in any way from this message or its attachments.

[Unsubscribe from this alert](#)

Add a Note to a Contact

How do I Add a Note for a Contact in Agentbox?

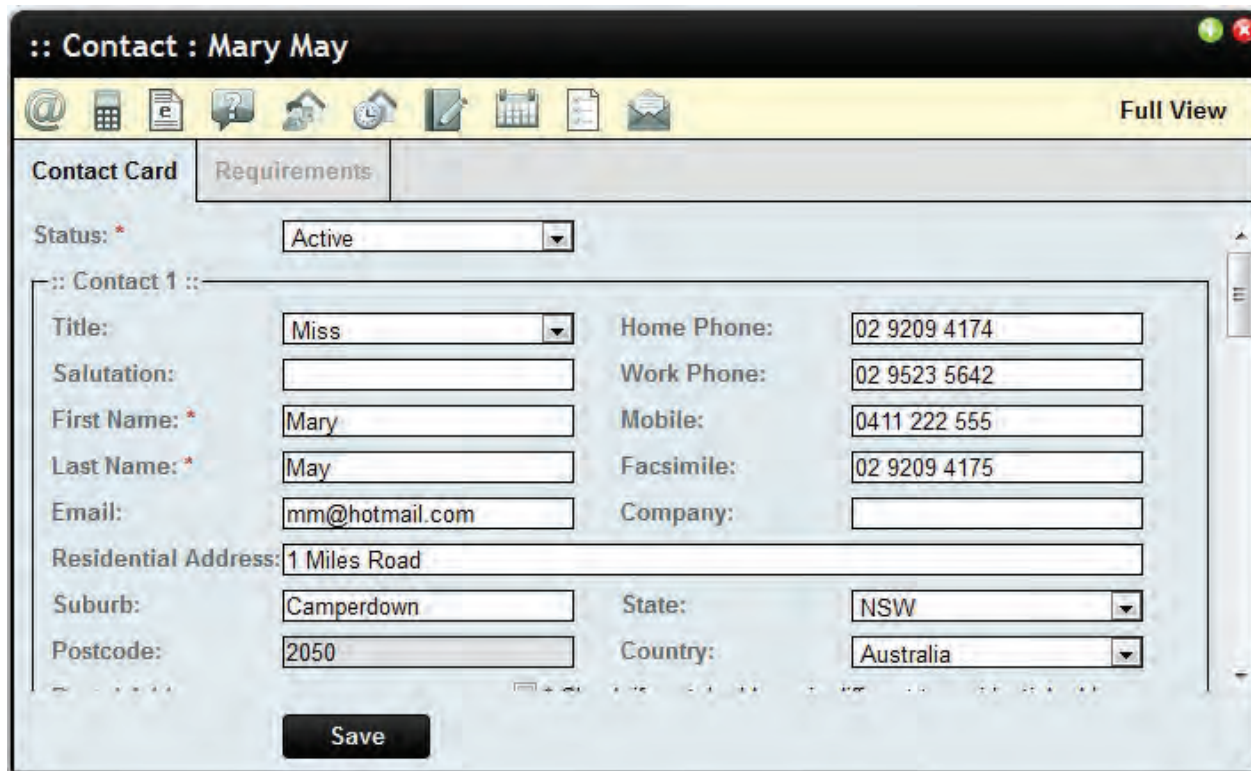
There are 3 ways to add a note entry against a contact in Agentbox:

- Through the Contact Card
- Advanced Contact Search Results

- Through the Contact icons on the contact lists throughout their system - e.g. tasks overview panel, viewers (inspection feedback) panel etc.

Contact Card

1. [Search for your Contact](#) and open their [Contact Card](#)



The screenshot shows a software window titled "Contact : Mary May" with a "Full View" button in the top right. Below the title bar is a toolbar with icons for email, calculator, document, chat, home, clock, pencil, calendar, and envelope. The main content area has two tabs: "Contact Card" (selected) and "Requirements". Under "Contact Card", the "Status" is set to "Active". Below this is a section titled "Contact 1" containing a form with the following fields:

Title:	Miss	Home Phone:	02 9209 4174
Salutation:		Work Phone:	02 9523 5642
First Name: *	Mary	Mobile:	0411 222 555
Last Name: *	May	Facsimile:	02 9209 4175
Email:	mm@hotmail.com	Company:	
Residential Address:	1 Miles Road		
Suburb:	Camperdown	State:	NSW
Postcode:	2050	Country:	Australia

At the bottom of the form is a "Save" button.

2. Click on Add a Note action icon 

3. Enter a note Headline

4. Attach a Property if applicable

*Note: If you tick Publish Note, all staff with access to view the contact will be able to also view the note. If not ticked the note can only be viewed by you.

:: Contact : Mary May : Add a Note

Create New Note | View Previous Notes

Note Date: * 05 11 2011 02 45 PM

Headline: * Possible Hot Buyer - 1 Jones St, Copacabana 1P0001

Description: Mary seems to be quite taken by 1 Jones St. Looks like a promising buyer.

Assign Property: Add

Selected Properties: ID #1P0001 - 1 Jones Street, Copacabana

Publish Note: Publishing this note will allow all relevant staff to view this note.

Add as a Task:

Save

6. Click on Save

Your Notes will then appear in the left Contact panel for quick reference when accessing your Contact and also on your print lists etc.

Mary May

< Back to Contacts

Notes History

- Comments - Has 3 kids, looking for a larger home.
- 05/11/11 - Possible Hot Buyer - 1 Jones St, Copacabana 1P0001 : Mary seems to be quite taken by 1 Jones St. Looks like a promising buyer. - created by: *John Smith*
More Detail »

> Communication History

> Activity Schedules

> Viewed Inspections(1)

> Contact Modifications

> Help Text

































Advanced Contact Search Results

1. Perform an [Advanced Contact Search](#)

:: Advanced Contact Search : Search Results(27 contacts found)

New Search | Search Results | Refine Search | Saved Searches

Sort By: Contact Last Name: A-Z

Contact	Assigned Staff	Last Contacted	Contact Info
Apex Printing	Jane Smith		  
Jack Black	Jane Smith		 
Gary Brown	Jane Smith		  
Julia Burn	Jane Smith	14/02/12 (letter)	   
Nick Citizen	Jane Smith		 
Kim French	Jane Smith		 
Kate Green	Jane Smith		 
Maria Hook	Jane Smith		  
Max Hook	Jane Smith		   
Michael Johnson	Jane Smith	21/03/12 (email)	   
Samuel Johnson	Joseph Western(more)		  

2. Click on the Add a Note action icon  next to the corresponding Contact.

Task Overview Panel

1. Click on Tasks from the Main Menu



2. Click on the Add a Note action icon  next to the corresponding Contact.

Tasks

Today's | Upcoming | Completed | Overdue

Tasks Keyword Search | --Filter Action | Search | Add

Due	Related Contact(s)	Related Property(s)	Subject	Description	Action
04/11/2011	Michael Johnson	1 Jones Street, Copacabana	General Enquiry	Would like to inspect the property	Create Letter Make a Phone Call
18/11/2011	Samantha Jones	1 Jones Street, Copacabana	Buyer Enquiry - Listing ID #1P0001 - 1 Jones Street, Copacabana	Would like to privately inspect the prop...	
18/11/2011	Samantha Jones	1 Jones Street, Copacabana	Send letter	Send attached letter.	Create Letter
20/11/2011	Samantha Jones	1 Jones Street, Copacabana	Make a phone call	discuss likelihood of selling	Make a Phone Call
24/11/2011	Mary May	1 Jones Street, Copacabana	Contract Request	Has a meeting on Friday with solicitor. ...	

Complete Tasks | Add Activity Schedule | View | Edit Activity Schedule | Apply Activity Schedule | Print Tasks

View Contact Notes History

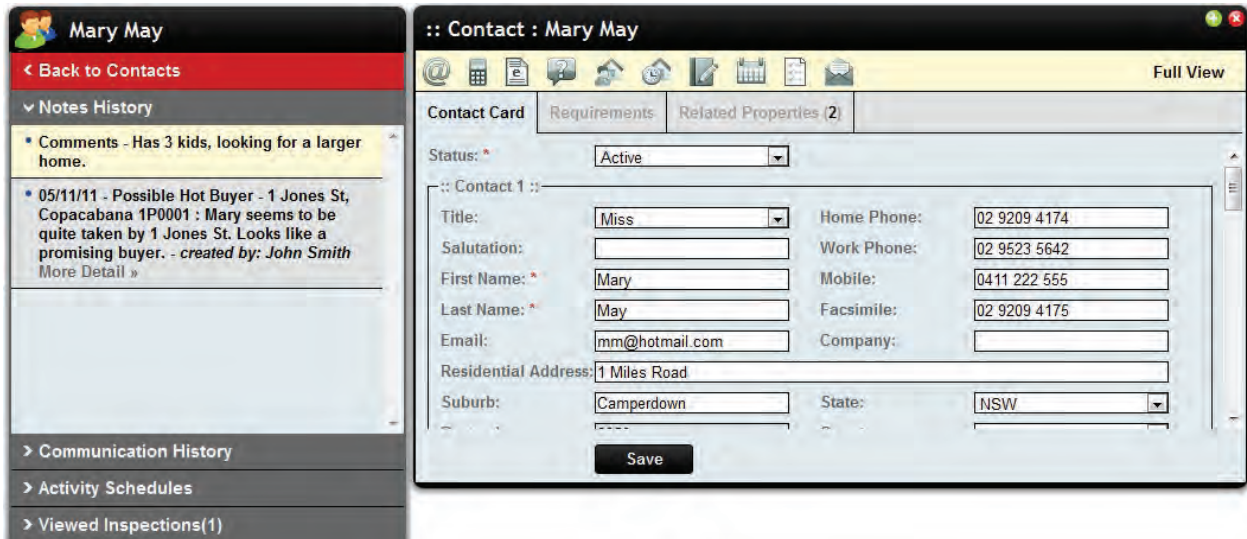
View Contact Notes History

1. [Search for your Contact](#) and open their [Contact Card](#)

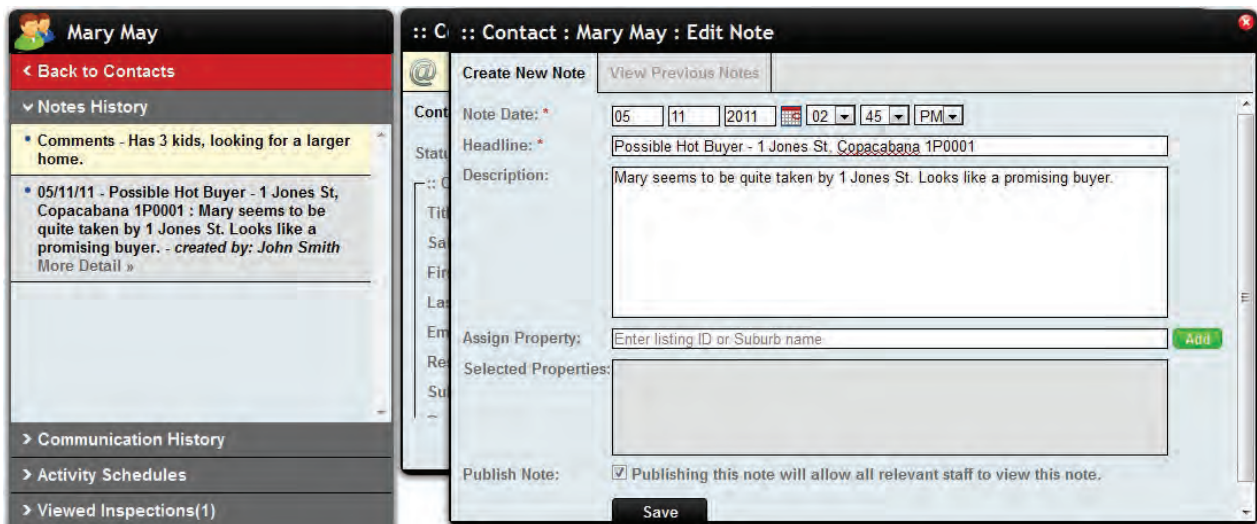
The screenshot displays a software interface for managing contact information. On the left, a sidebar for 'Mary May' offers navigation options: '< Back to Contacts', '> Notes History', '> Communication History', '> Activity Schedules', '> Viewed Inspections(1)', '> Contact Modifications', and '> Help Text'. The main window, titled ':: Contact : Mary May', is in 'Full View' and shows the 'Contact Card' tab. The status is 'Active'. Contact details include: Title (Miss), Home Phone (02 9209 4174), Work Phone (02 9523 5642), First Name (Mary), Mobile (0411 222 555), Last Name (May), Facsimile (02 9209 4175), Email (mm@hotmail.com), and Company. Residential address is 1 Miles Road, Camperdown, NSW, Australia, with postcode 2050. A checkbox for 'Postal Address' is present with a note: '* Check if postal address is different to residential address'. Contact Method is set to 'Email' and Anniv Date is 0/0/0. Buttons for 'Add Related Contact', 'Add Related Property', and 'Setup Letter Head' are visible. A note for 'Matthew Warren (Spouse)' is listed with email mw@bigpond.net and mobile 0412 345 678. Contact Class options are 'Accountant' and 'Past Vendor'. A 'Save' button is at the bottom.

2. On the left panel click Notes History (If the matching left panel is not visible, click Full View in the top right hand corner of the contact card).

3. You will see a list of notes against the contact, the contact comments entered on the Contact Card will always appear first followed by the most recent notes logged using the [Add Note](#) action Icon.




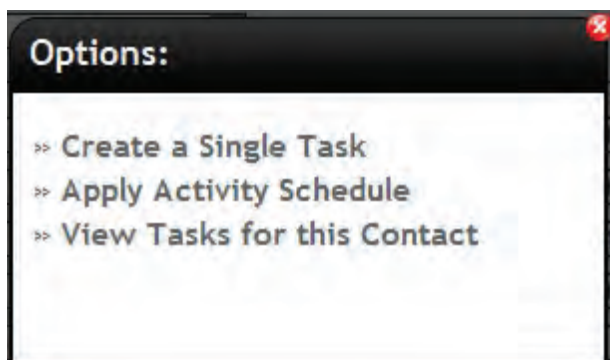
4. You can view the note by clicking More Detail.



Tasks & Activity Schedules

How do I add a task against a Contact?

1. [Search for your Contact](#) and open their [Contact Card](#)
2. Click on the Add a Task icon 



3. Select [Create a Single Task](#)
[Apply Activity Schedule](#)
 View Tasks for this Contact

If you select view tasks for this contact the contact task view will appear, here you can add a task, delete a task, view current contact tasks or view completed contact tasks

:: Contact : Samantha Jones : View Tasks						
Create New Task		View Current Tasks		View Completed Tasks		
Task	Responsible Staff	Due	Done?	Listing(s)		
Buyer Enquiry - Listing ID #1P0001 - 1 Jones Street, Copacabana	John Smith, Melanie Thompson	18/11/11	no	#1P0001	Delete	
Send letter	John Smith	18/11/11	no	#1P0001	Delete	
Make a phone call	John Smith, Melanie Thompson	20/11/11	no	#1P0001	Delete	

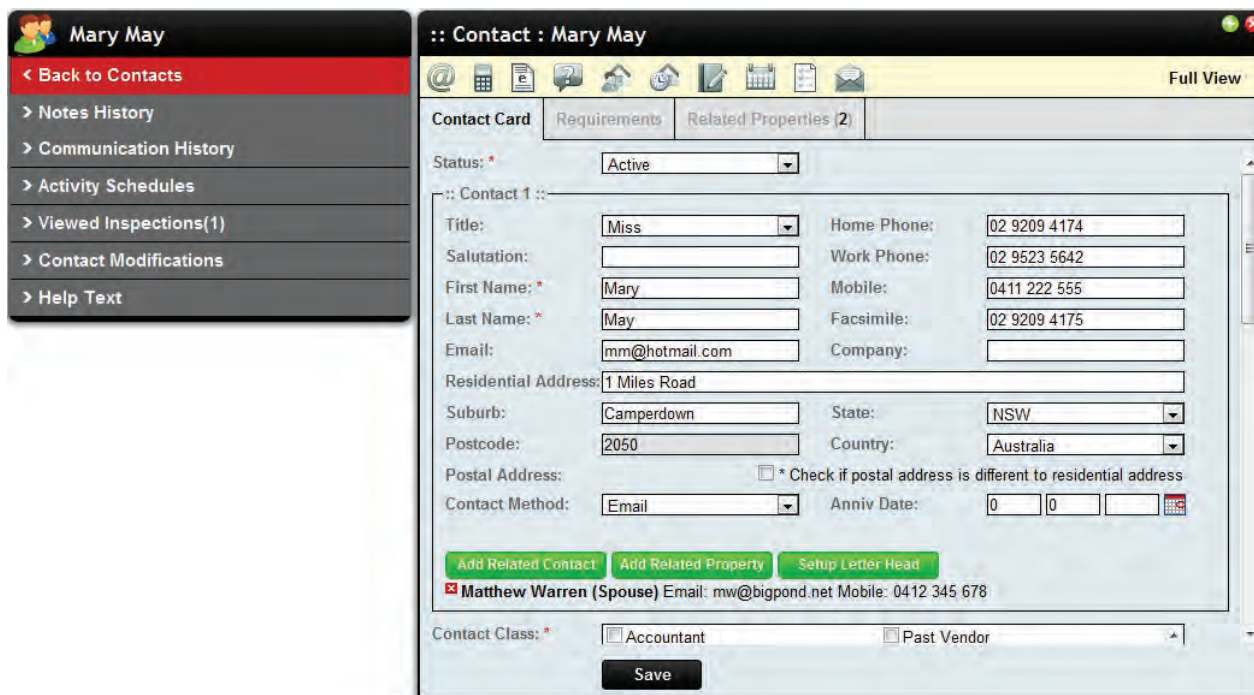
You may also be interested in:

- [How to edit a task](#)
- [How to attach a file to a task](#)
- [How to complete a task](#)

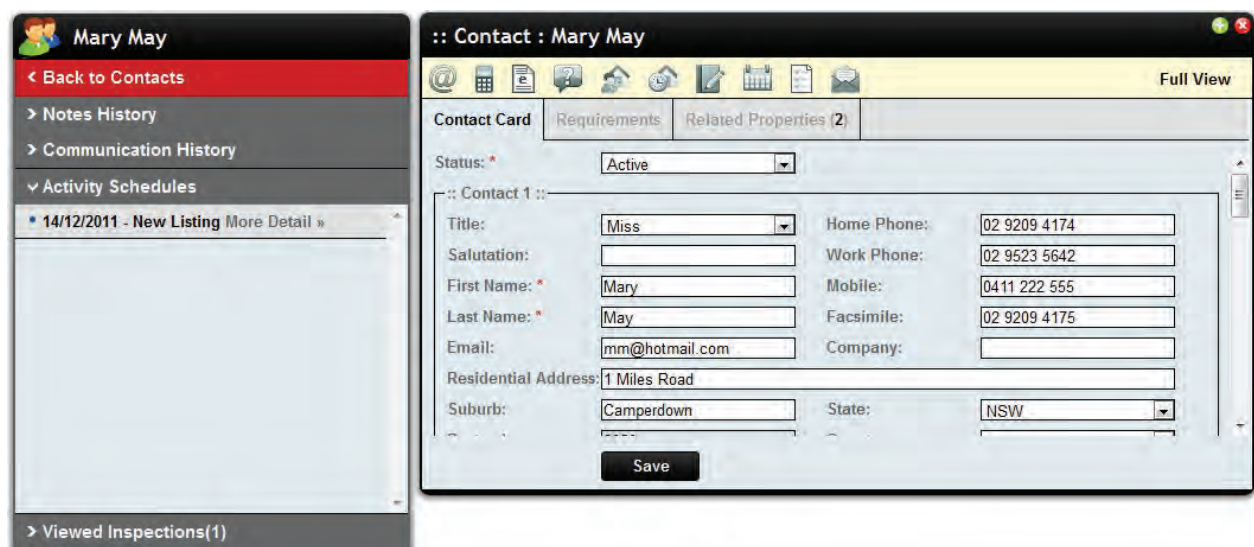
View Applied Activity Schedules

How do I view Applied Activity Schedules to a contact?

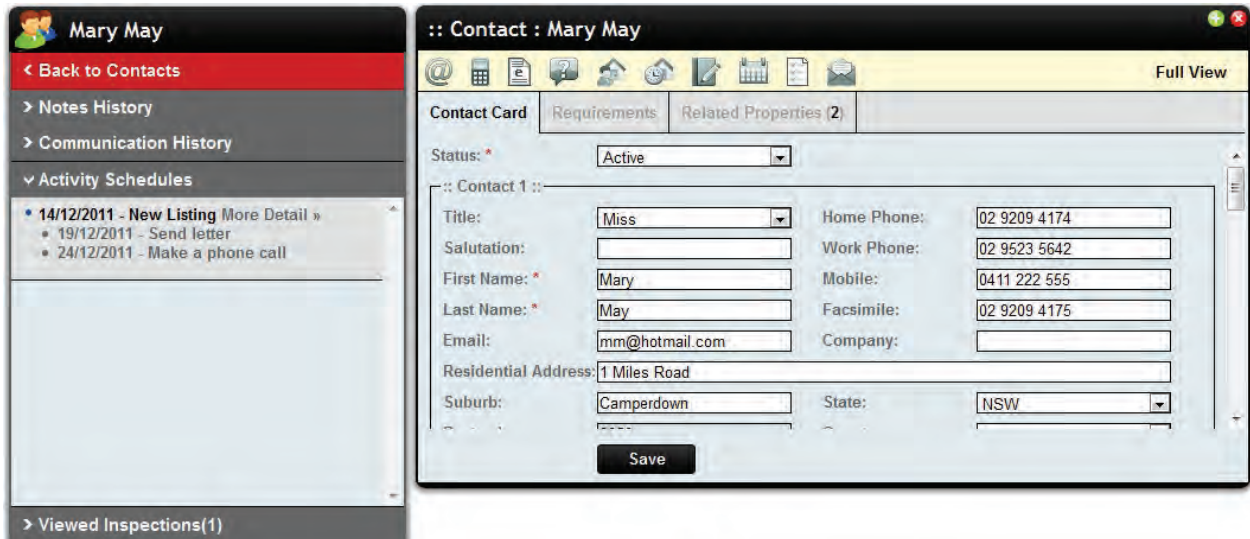
1. [Search for your Contact](#) and open their [Contact Card](#)



2. On the left panel click Activity Schedules (If the matching left panel is not visible, click Full View in the top right hand corner of the contact card).



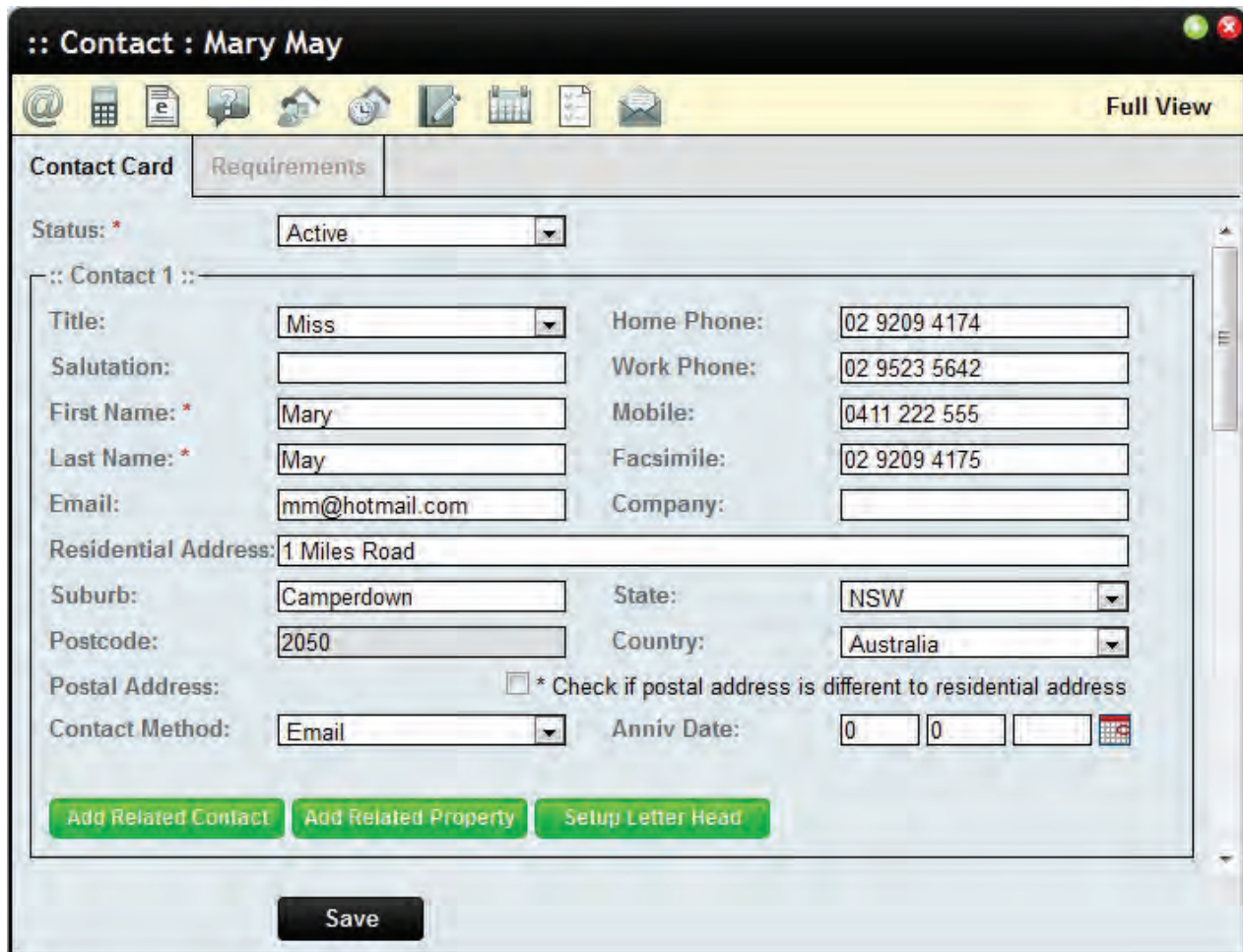
3. You will see a list of Activity Schedules that have been applied to the property. Click More Detail, to view the tasks relating to the schedule.



Send a Letter to a Contact

How do I Create a Letter for a Contact in Agentbox?

1. [Search for your Contact](#) and open their [Contact Card](#)



2. Click on Create A Letter action icon 

Contact Letter :: Mary May


Step 1 of 3 - Select Template View created letters »

Templates Modify The Letter Letter Distribution

Select a Template: Purchaser Sales Advice

Send From: ---- Select Staff Member (By default will be yourself) ----

Purchaser Sales Advice



Your Agency
 4 Cornwallis Street, Eveleigh, NSW 2015
 Phone: 02 9209 4174
 Fax: 02 9310 7232
 Email: office@agentbox.com.au
 ABN: 11 222 112 142

Property Details

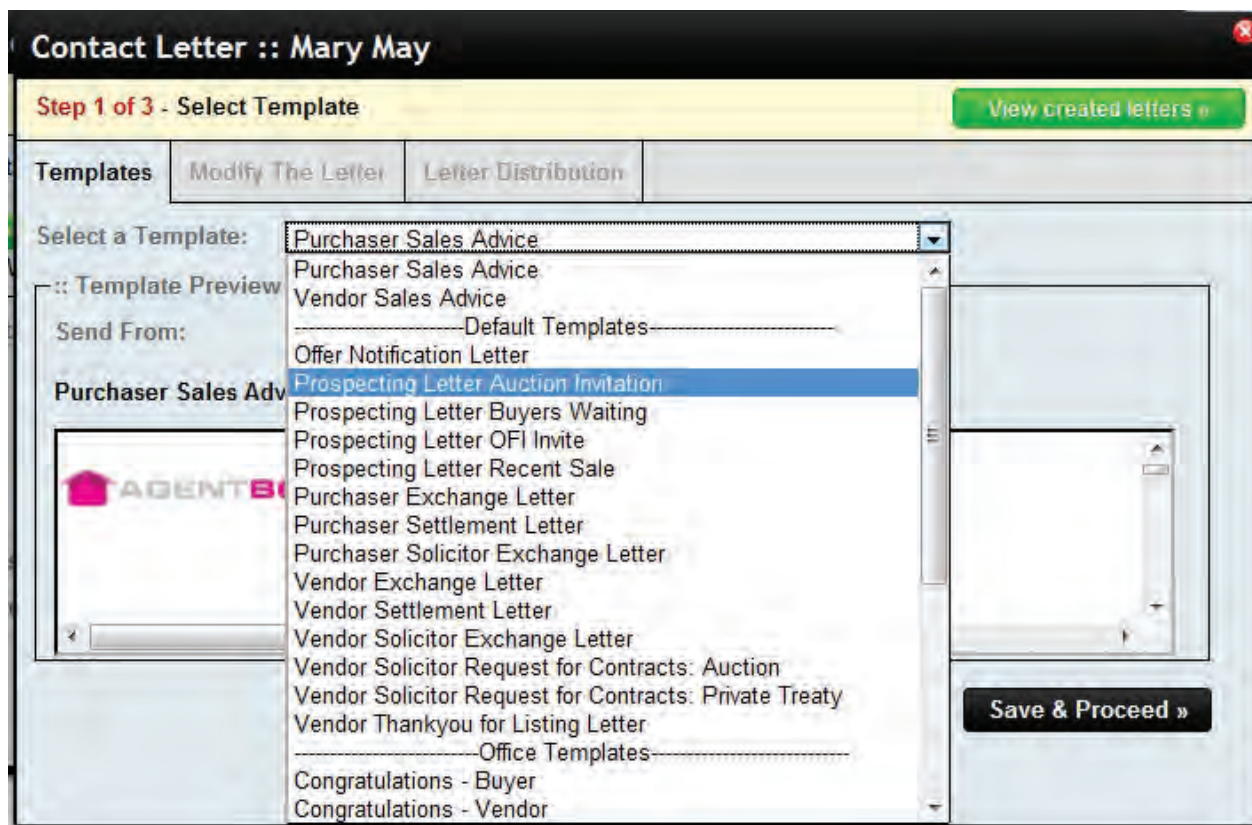
Property Address:	{\$prop_loc}	
Contract Price:	{\$sold_price}	Deposit Held:

Save & Proceed »

3. Click on Select a Template Drop Down and select a Letter Template - In this example we are using the Prospecting Letter Auction Invitation. (This template uses the owner occupied merge fields so the contact needs the contact class Owner Occupied ticked).

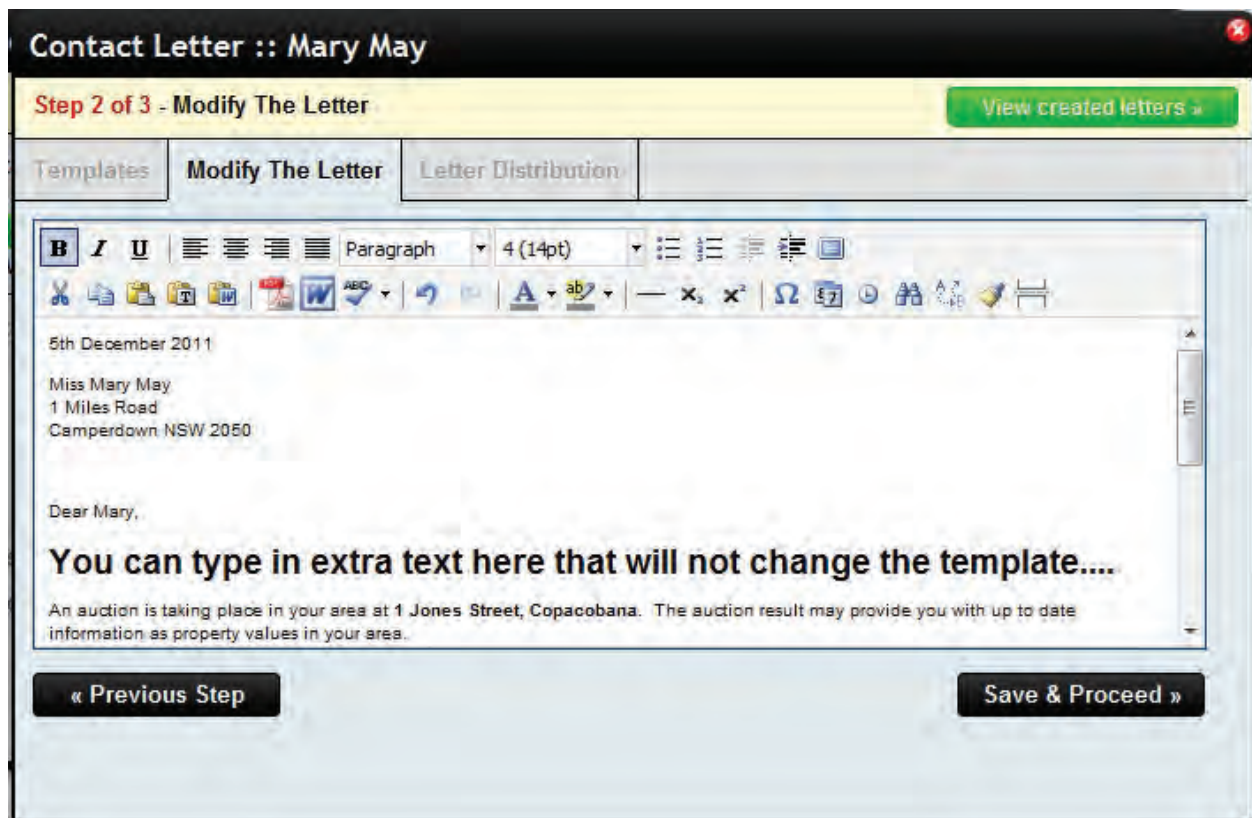
Contact Class: *

<input checked="" type="checkbox"/> Developer	<input type="checkbox"/> Supplier
<input type="checkbox"/> Investor	<input type="checkbox"/> Tenant
<input type="checkbox"/> Landlord	<input type="checkbox"/> Tradesperson
<input type="checkbox"/> Other	<input checked="" type="checkbox"/> Vendor
<input checked="" type="checkbox"/> Owner Occupied	<input type="checkbox"/> Vendor Solicitor
<input type="checkbox"/> Past Purchaser	



4. Click on Save & Proceed

5. Modify the Letter if necessary



6. Click on Save & Proceed

Either

- * Click on Print to generate a PDF for download
- * Export to WinWord

Contact Letter :: Mary May

Step 3 of 3 - Letter Distribution [View created letters »](#)

Templates | Modify The Letter | **Letter Distribution**

Distribution Method: ▼

- Print as PDF
- Print as PDF
- Send as HTML email**
- Send as an attachment via email

Print This will convert the Letter to a PDF for your printing needs and will save a copy to the property record for later reference.

WinWord This will convert the Letter to a WinWord Document for your printing needs.

« Previous Step **Save & Proceed »**

- * Select delivery method from the drop down menu to either send as the body of an email 'Send as HTML' or attach to an email as a PDF.
 - o Enter Subject and Message
 - o Assign Contacts and select 'Add'
 - o Click on Save & Proceed to Email

Contact Letter :: Mary May

Step 3 of 3 - Letter Distribution View created letters »

Templates | **Modify The Letter** | Letter Distribution

Distribution Method: Send as an attachment via email ▼

:: Option to Email this Letter ::

Email Subject: * Vendor Solicitor Request for Contracts: Auction

Email Message :

B I U | [List Icons] | Format ▼ | [List Icons]

[Rich Text Editor Icons]

Please find the attached letter.

Downloading PDF Documents

If you do not already have the free Acrobat Reader application installed on your computer, you will first need to download it before looking at the publication files. Click on the icon below and follow the installation

Reply From: Jane Smith (jane@agentbox.com.au) ▼

Assign Contact: [Empty Field] Add

Email Contact(s)?: Mary May

« Previous Step Save & Proceed »

View Contact Modifications

View Contact Modifications

1. [Search for your Contact](#) and open their [Contact Card](#)

Mary May

- < Back to Contacts
- > Notes History
- > Communication History
- > Activity Schedules
- > Viewed Inspections(1)
- > Contact Modifications
- > Help Text

:: Contact : Mary May

Full View

Contact Card Requirements Related Properties (2)

Status: * Active

:: Contact 1 ::

Title: Miss Home Phone: 02 9209 4174

Salutation: Work Phone: 02 9523 5642

First Name: * Mary Mobile: 0411 222 555

Last Name: * May Facsimile: 02 9209 4175

Email: mm@hotmail.com Company:

Residential Address: 1 Miles Road

Suburb: Camperdown State: NSW

Postcode: 2050 Country: Australia

Postal Address: * Check if postal address is different to residential address

Contact Method: Email Anniv Date: 0 0

Add Related Contact Add Related Property Setup Letter Head

Matthew Warren (Spouse) Email: mw@bigpond.net Mobile: 0412 345 678

Contact Class: * Accountant Past Vendor

Save

2. On the left panel click Contact Modifications (If the matching left panel is not visible, click Full View in the top right hand corner of the contact card).

3. You will see a list of changes to the contact. You can also filter the changes using the drop-down menu.

Mary May

- < Back to Contacts
- > Notes History
- > Communication History
- > Activity Schedules
- > Viewed Inspections(1)
- > Contact Modifications
- Filter Modifications ---All Modifications---
- By:
- 05/12/11 01:59PM - John Smith
Contact Class : Added Owner Occupied
- 19/08/11 02:39PM - John Smith
Contact Class : Added Buyer
- 19/08/11 02:39PM - John Smith
Assigned Staff : Added John Smith
- 19/08/11 02:39PM - John Smith
Contact Subscribe : Added Newsletters,
Property Updates
- 19/08/11 02:39PM - John Smith
Contact Email : => mm@hotmail.com
- 19/08/11 02:39PM - John Smith
- > Help Text

:: Contact : Mary May

Full View

Contact Card Requirements Related Properties (2)

Status: * Active

:: Contact 1 ::

Title: Miss Home Phone: 02 9209 4174

Salutation: Work Phone: 02 9523 5642

First Name: * Mary Mobile: 0411 222 555

Last Name: * May Facsimile: 02 9209 4175

Email: mm@hotmail.com Company:

Residential Address: 1 Miles Road

Suburb: Camperdown State: NSW

Postcode: 2050 Country: Australia

Postal Address: * Check if postal address is different to residential address

Contact Method: Email Anniv Date: 0 0

Add Related Contact Add Related Property Setup Letter Head

Matthew Warren (Spouse) Email: mw@bigpond.net Mobile: 0412 345 678

Contact Class: * Accountant Past Vendor

Save

Tasks

Tasks



In 'Tasks' you can add/edit/archive staff members. Edit the office contact details, request portals etc.

[How do I view my tasks?](#)

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

[How can I edit a task I have entered?](#)

[How do I attach a file to a task?](#)

[How do I complete tasks?](#)

[Can I complete multiple tasks at one time? / How do I bulk complete tasks?](#)

[How do I print a list of tasks?](#)

[How do I create an Activity Schedule Template?](#)

[How do I apply an Activity Schedule?](#)

Task View

How do I view my tasks?

1. Click on tasks on the main menu.



2. The task panel will open.

- Your overdue tasks will appear in red
- You can click through the contacts name to open the contact card, property address to open the property card etc.
- You can tab across to view your upcoming or overdue tasks
- You can filter your tasks e.g. bring up all your make phone call tasks or search for a keyword.
- You can add a task, apply an activity schedules, bulk complete tasks or print your tasks

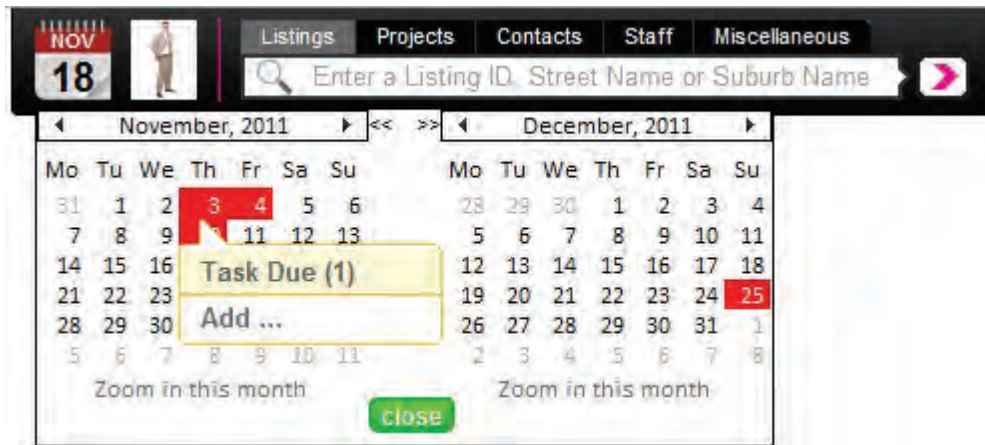
Due	Related Contact(s)	Related Property(s)	Subject	Description	Action
26/10/2011	Jack Black	52 Elizabeth Street, Surry Hills	Contract Request	send a copy of the contract	Make a Phone Call
03/11/2011	Thomas Train	52 Elizabeth Street, Surry Hills	Vendor is going away for 3 weeks	hrvis uvivuhwku wuhv sluvfh lsifvg lsa...	Make a Phone Call
04/11/2011	Michael Jones	1 Jones Street, Copacabana	General Enquiry	Would like to inspect the property	Make a Phone Call
18/11/2011	Samantha Jones	1 Jones Street, Copacabana	Buyer Enquiry - Listing ID #1P0001 - 1 Jones Street, Copacabana	Would like to privately inspect the prop...	
18/11/2011	Samantha Jones	1 Jones Street, Copacabana	Send letter	bsrbsmsnsrfrfm	Create Letter

Other Ways to View Tasks

Other Ways to View/Add/Edit My Tasks

Through your Calendar

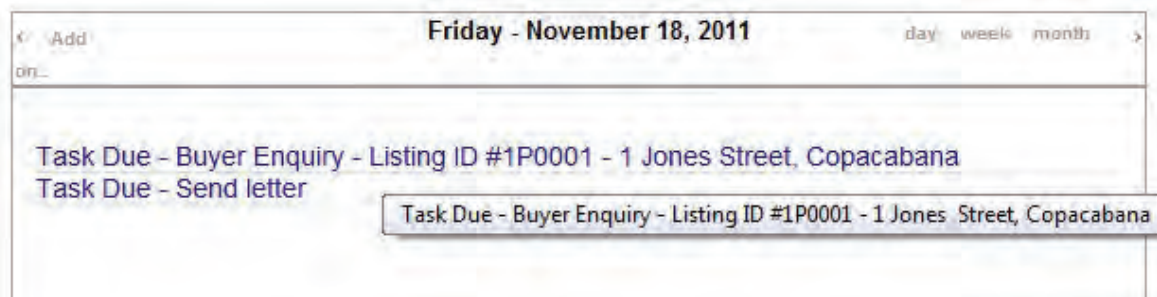
1. Click on the Calendar icon from the Universal Search Bar
2. Click on the task date



To view/edit - Click Task Due

Click the task you would like to view/edit

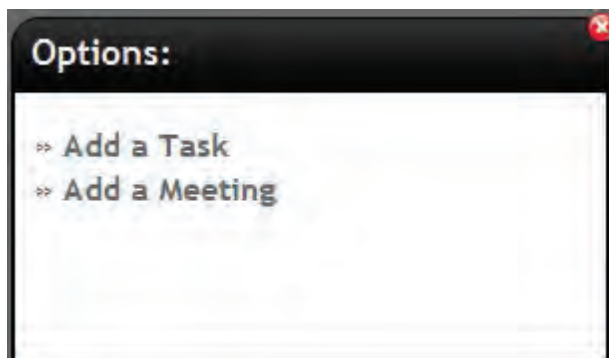
Follow the steps [How to Edit a Task](#)



To add - Click Add...

Click on Add a Task

Follow the steps on [How to Enter a Task](#)



Enter Tasks

How do I add a task?

1. Click add a task from your [Calendar](#), [Property](#), [Contact](#) or the [Task view](#) screen.
2. Complete the task details

Task Entered: - the date the task is created

Task Due: - the date the task is due

Headline: * - compulsory field

Description: *- compulsory field

Responsible Staff: *- compulsory field

Assign Contact: - to link the task to a contact

Selected Contact(s): - to link the task to a property

Assign Action: - to link an action e.g. create a letter

Selected Actions: lists the assigned action, if send a letter; E-Newsletter etc. you can select the template

Task Completed?: - Check this box to complete a task

The screenshot shows a web-based form for adding a task. The window title is ":: Listing : 1P0001 - Copacabana : Add Task". The form is divided into several sections. At the top, there are three tabs: "Create New Task" (selected), "View Current Tasks", and "View Completed Tasks". Below the tabs, the form fields are as follows:

- Task Entered:** A date and time picker showing 18/11/2011 at 02:40 PM.
- Task Due:** A date and time picker showing 23/11/2011 at 02:40 PM.
- Headline:** A text input field containing "Task Headline".
- Description:** A large text area containing the placeholder text "Enter task description".
- Responsible Staff:** A list of staff members with checkboxes: Office Admin, Joe Franks, John Smith, Jane Thomas, and Melania Thompson.
- Assign Contact:** A text input field.
- Selected Contact(s):** A text input field.

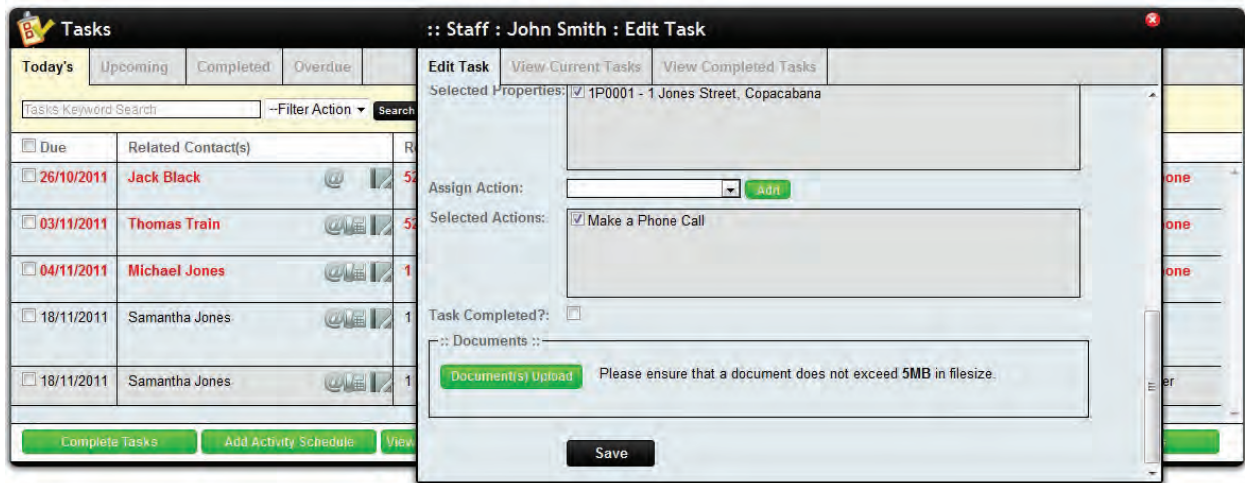
A green "Add" button is located at the bottom right of the form.

3. Hit save, the task will appear in your [task view](#) on it's due date.
or
4. Hit [Save & Add file](#), to upload and attach a document to your task.

Edit Tasks

How do I edit a task?

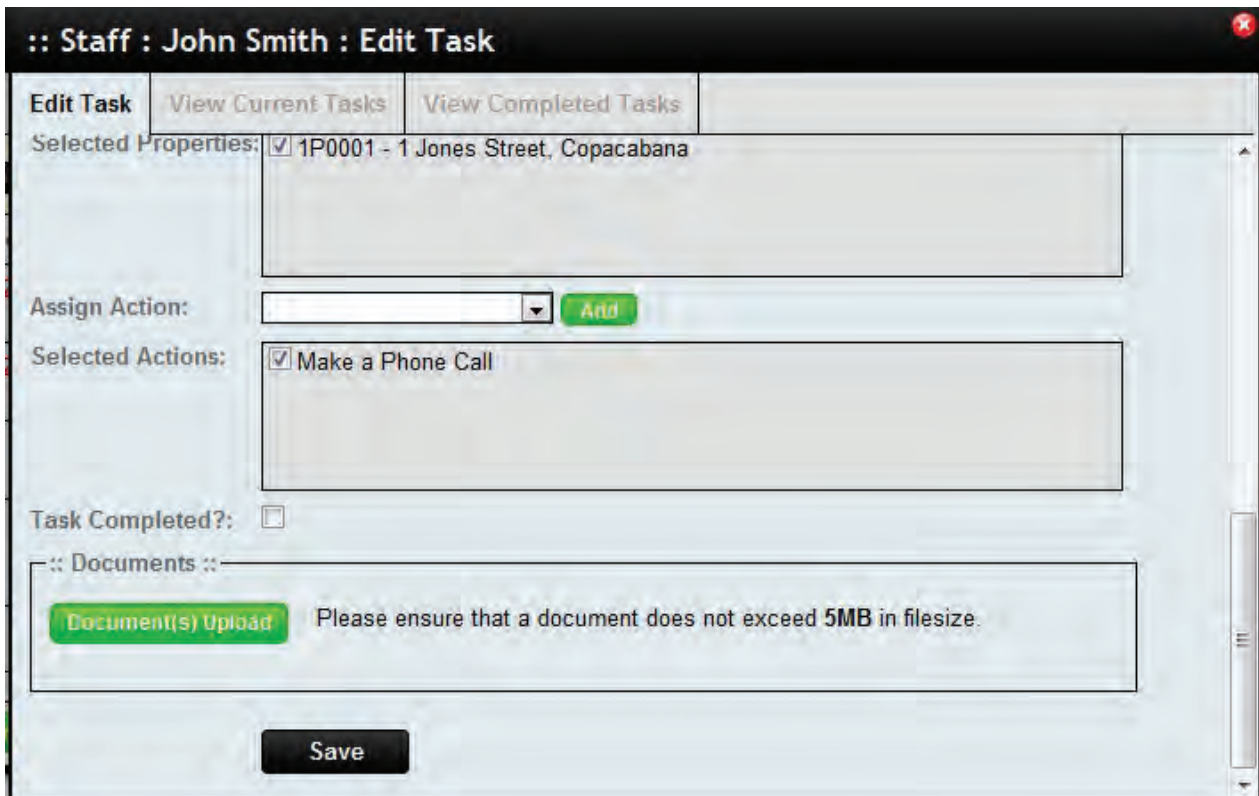
1. Open your task from your [Calendar](#), [Property](#), [Contact](#) or the [Task view](#) screen.
2. Edit the task details, [upload document](#) and/or [assign action](#) and hit save



Attach File to Task

How do I attach a file to a task?

1. You can add a file to a task when [creating the task](#) for the first time or by [editing a task](#).
2. This example is from editing a task. Click the green Document(s) Upload button



3. Click Browse

Click the 'Browse Files' button to go and select the files you wish to upload from your local computer. Then select 'Upload' to confirm the files to publish.



:: File(s) Upload ::

Browse Files

Overall progress

0%

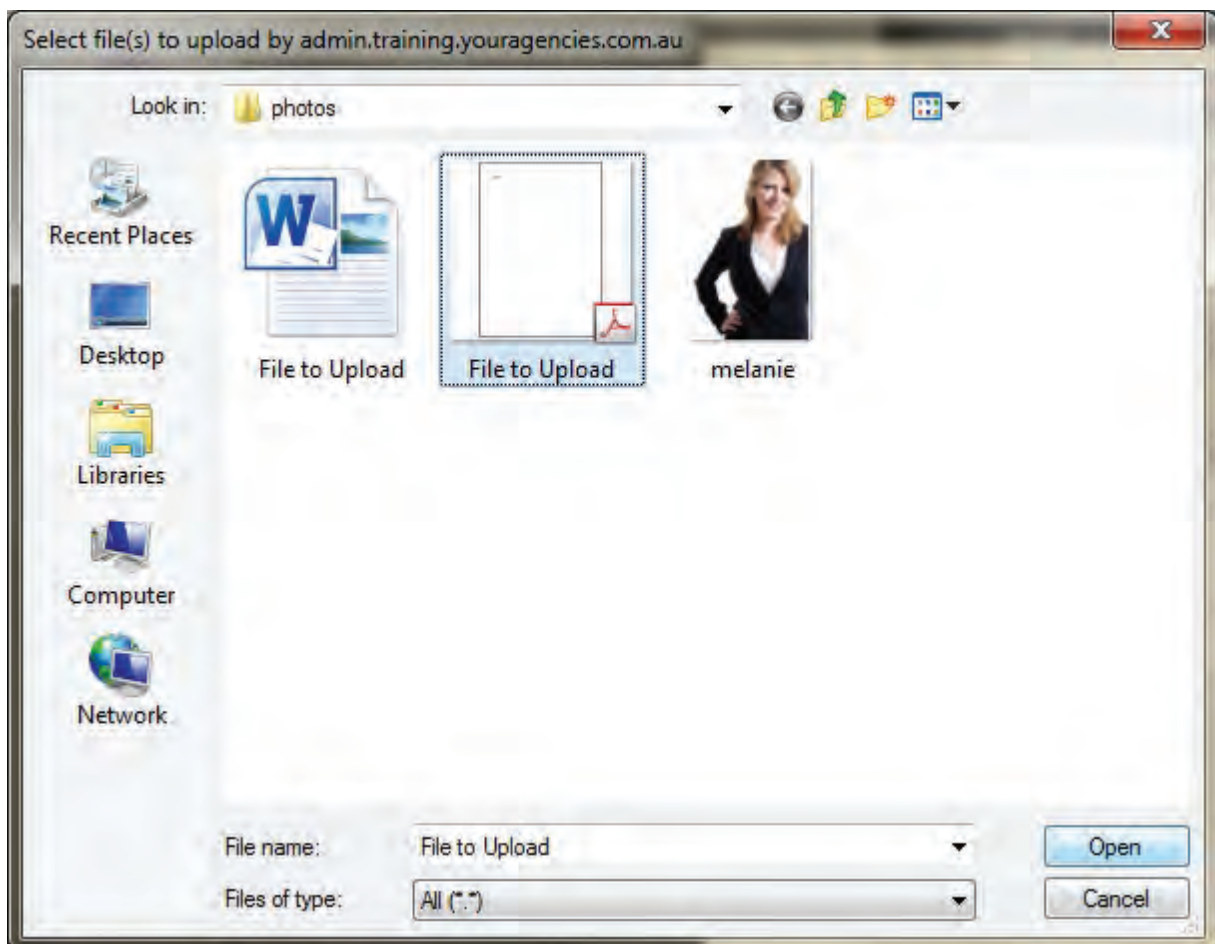
File Progress

0%

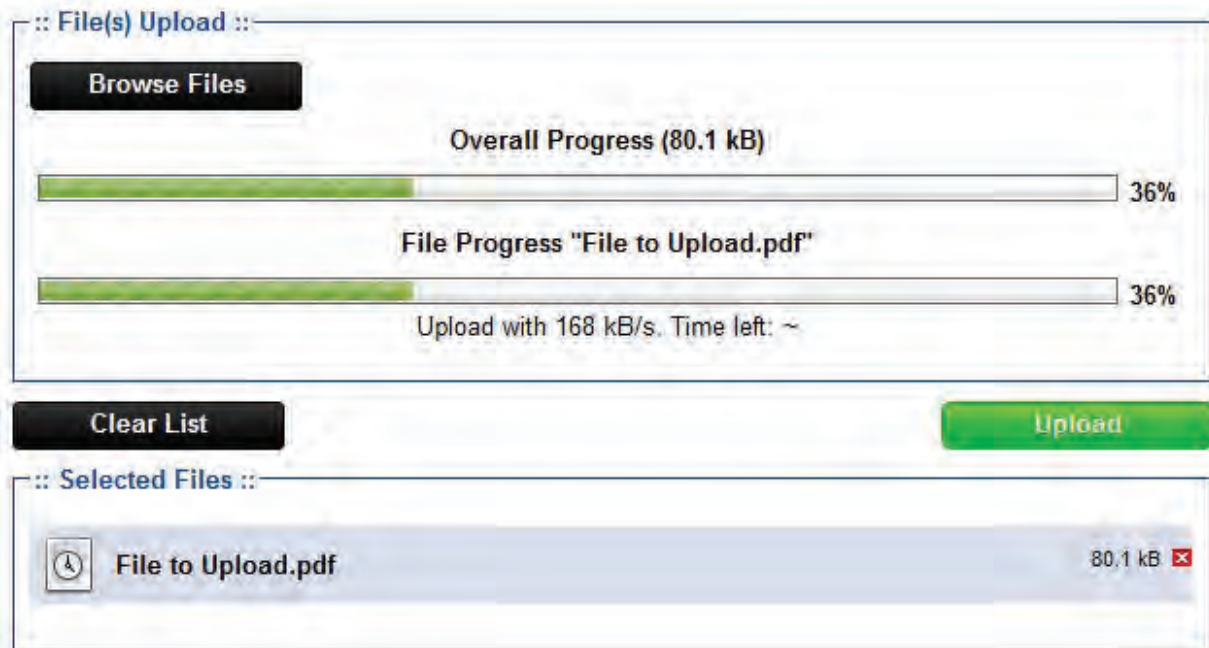
Clear List **Upload**

:: Selected Files ::

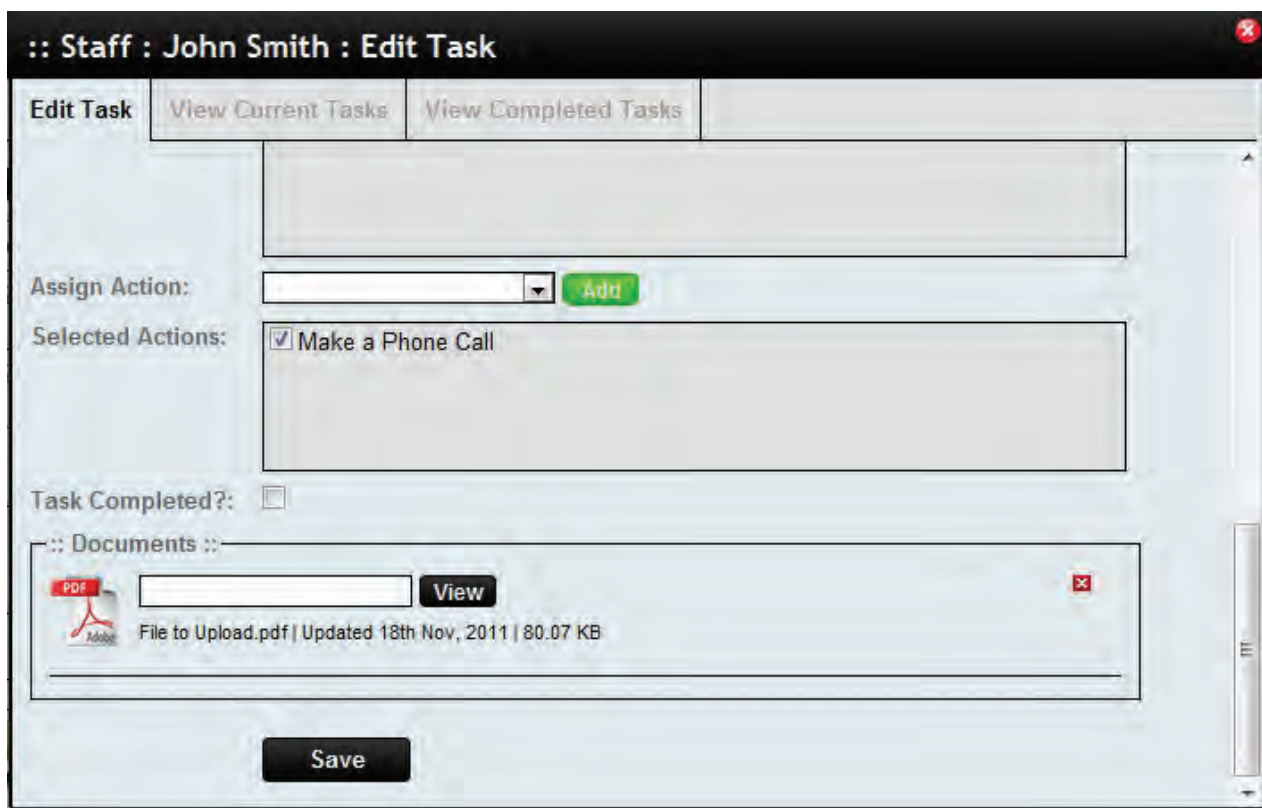
2. Click on the file you would like to upload then click open. (You can upload one file per task, if you would like to attach multiple files upload a zip folder containing all related files)



3. Click the green Upload button to upload the file(s).



4. Once uploaded you will return to the task view, you can open the attachment by clicking View.



5. Click Save to finish

Assign Action to Task

How do I assign an action to a task?

1. You can add a file to a task when [creating the task](#) for the first time or by [editing a task](#).

2. This example is from editing a task. Select the action from the Assign Action drop down.

:: Staff : John Smith : Edit Task

Edit Task | View Current Tasks | View Completed Tasks

Selected Properties: 1P0001 - 1 Jones Street, Copacabana

Assign Action: **Add**

Selected Actions:

- Add a Meeting
- Create a Task
- Create Digital Print
- Create Letter**
- Create Vendor Report
- Make a Phone Call
- Send Email
- Send Enewsletter
- Send SMS

Task Completed?:

Document(s) Upload Please ensure that a document does not exceed **5MB** in filesize.

Save

3. Click the green Add button to add the action to the selected actions box.

:: Staff : John Smith : Edit Task

Edit Task | View Current Tasks | View Completed Tasks

Selected Properties: 1P0001 - 1 Jones Street, Copacabana

Assign Action: **Add**

Selected Actions:

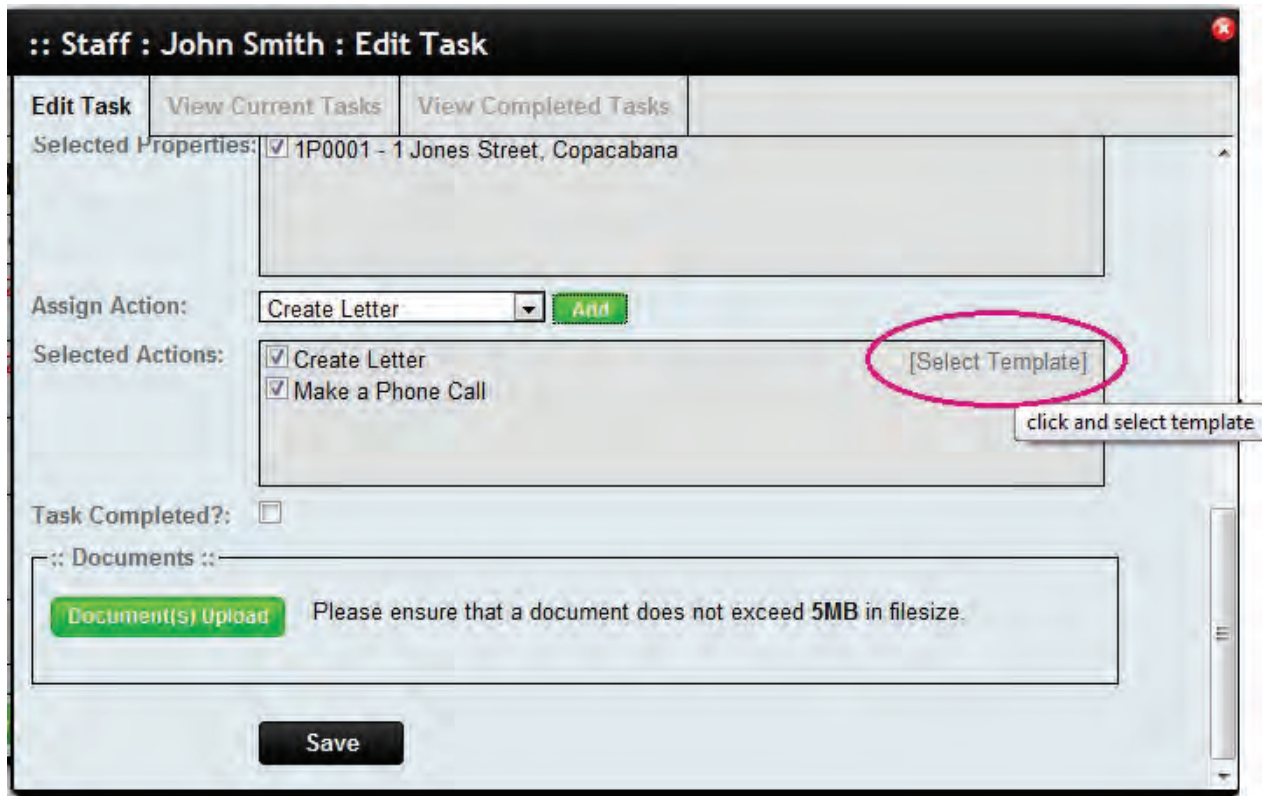
- Make a Phone Call **Add this Action**

Task Completed?:

Document(s) Upload Please ensure that a document does not exceed **5MB** in filesize.

Save

4. If assigning a letter, digital print or e-newsletter you can select the template you would like to use by clicking Select Template.



5. Select the template you would like to use from the drop down and click save



6. Click Save to finish

:: Staff : John Smith : Edit Task

Selected Properties: 1P0001 - 1 Jones Street, Copacabana

Assign Action:

Selected Actions: Create Letter [Edit]Protect Fee Letter - Vendor Solicitor
 Make a Phone Call

Task Completed?:

:: Documents ::

Please ensure that a document does not exceed **5MB** in filesize.

Completing Tasks

How do I complete a task?

1. You can mark a task complete in the [task view](#) or by [editing a task](#)
2. In the task view, tick the check box next to the task you would like to mark complete and tick the green Complete button at the bottom of the view.

Tasks						
Today's						
Upcoming						
Completed						
Overdue						
Tasks Keyword Search		--Filter Action		Search <input type="button" value="Add"/>		
<input type="checkbox"/> Due	Related Contact(s)	Related Property(s)	Subject	Description	Action	
<input type="checkbox"/> 26/10/2011	Jack Black	52 Elizabeth Street, Surry Hills	Contract Request	send a copy of the contract	Make a Phone Call	
<input type="checkbox"/> 03/11/2011	Thomas Train	52 Elizabeth Street, Surry Hills	Vendor is going away for 3 weeks	hrvis uvisuvhwku wiuhy siuvfh lsivfg lsu...	Make a Phone Call	
<input type="checkbox"/> 04/11/2011	Michael Jones	1 Jones Street, Copacabana	General Enquiry	Would like to inspect the property	Make a Phone Call	
<input checked="" type="checkbox"/> 18/11/2011	Samantha Jones	1 Jones Street, Copacabana	Buyer Enquiry - Listing ID #1P0001 - 1 Jones Street, Copacabana	Would like to privately inspect the prop...		
<input type="checkbox"/> 18/11/2011	Samantha Jones	1 Jones Street, Copacabana	Send letter	bsrtbsrnsnsrfrfn	Create Letter	

3. This example is from editing a task. Tick the Task Completed check box and click save.

:: Staff : John Smith : Edit Task

Edit Task | View Current Tasks | View Completed Tasks

Selected Properties: 1P0001 - 1 Jones Street, Copacabana

Assign Action: **Add**

Selected Actions: Make a Phone Call

Task Completed?:

:: Documents ::

Document(s) Upload Please ensure that a document does not exceed **5MB** in filesize.

Save

4. You can view your completed tasks in the related [property](#), [contact](#) or from your completed tab in the [task view](#)

Bulk Complete Tasks

How can I complete multiple tasks at once?

1. Click on tasks on the main menu.



2. In the task view, tick the check box next to the task(s) you would like to mark complete and tick the green Complete button at the bottom of the view.

Tasks

Today's | Upcoming | Completed | Overdue

Tasks Keyword Search: --Filter Action Search **Add**

<input type="checkbox"/> Due	Related Contact(s)	Related Property(s)	Subject	Description	Action
<input type="checkbox"/> 26/10/2011	Jack Black	52 Elizabeth Street, Surry Hills	Contract Request	send a copy of the contract	Make a Phone Call
<input type="checkbox"/> 03/11/2011	Thomas Train	52 Elizabeth Street, Surry Hills	Vendor is going away for 3 weeks	hrvis uvisuvhwku wiuhv siuvfh lsivfg lsu...	Make a Phone Call
<input type="checkbox"/> 04/11/2011	Michael Jones	1 Jones Street, Copacabana	General Enquiry	Would like to inspect the property	Make a Phone Call
<input checked="" type="checkbox"/> 18/11/2011	Samantha Jones	1 Jones Street, Copacabana	Buyer Enquiry - Listing ID #1P0001 - 1 Jones Street, Copacabana	Would like to privately inspect the prop...	
<input type="checkbox"/> 18/11/2011	Samantha Jones	1 Jones Street, Copacabana	Send letter	bsrtbsrnsnsrfrfn	Create Letter

Complete Tasks **Add Activity Schedule** **View | Edit Activity Schedule** **Apply Activity schedule** **Print Tasks**

4. You can view your completed tasks in the related [property](#), [contact](#) or from your completed tab in the

[task view](#)

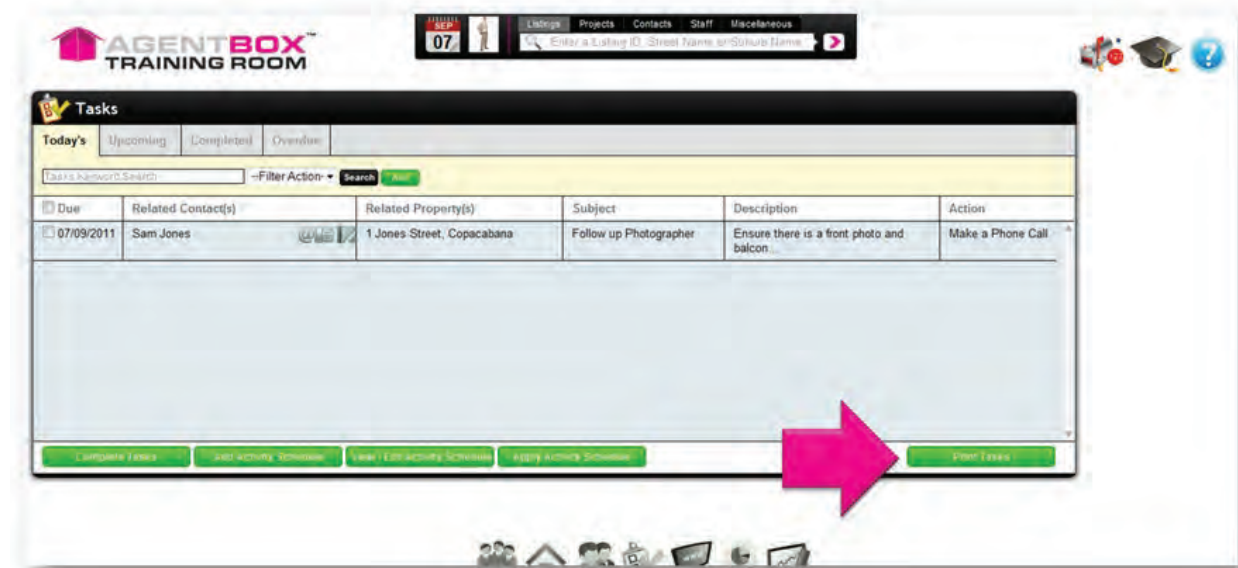
Print Tasks

How do I print my task list?

1. Go to 'Tasks' on the main menu.



2. Click on the green 'Print Tasks' button.



Create Activity Schedule

How do I create an Activity Schedule template?



1. Click on Tasks on the main menu
2. Click the Green 'Add Activity Schedule' button on the Task panel

Tasks						
Today's						
Upcoming						
Completed						
Overdue						
Tasks Keyword Search <input type="text"/> --Filter Action <input type="button" value="Search"/> <input type="button" value="Add"/>						
<input type="checkbox"/> Due	Related Contact(s)	Related Property(s)	Subject	Description	Action	
<input type="checkbox"/> 26/10/2011	Jack Black	52 Elizabeth Street, Surry Hills	Contract Request	send a copy of the contract	Make a Phone Call	
<input type="checkbox"/> 03/11/2011	Thomas Train	52 Elizabeth Street, Surry Hills	Vendor is going away for 3 weeks	hrvis uvisuvhwku wuhv sluvfh lsifvg	Make a Phone Call	
<input type="checkbox"/> 04/11/2011	Michael Jones	1 Jones Street, Copacabana	General Enquiry	Would like to inspect the property	Make a Phone Call	
<input type="checkbox"/> 18/11/2011	Samantha Jones	1 Jones Street, Copacabana	Buyer Enquiry - Listing ID #1P0001 - 1 Jones Street, Copacabana	Would like to privately inspect the prop...		
<input type="checkbox"/> 18/11/2011	Samantha Jones	1 Jones Street, Copacabana	Send letter	bsrbsrnsnsrfrfm	Create Letter	



3. The 'Create Activity Schedule' window will appear.
 1. Give the template a name
 2. Select the template access from the drop down menu.
 3. Click 'Save' to proceed to the next step

Create Activity Schedule

Add Activity Schedule

Activity Schedule: *

Access Template:

- By Me Only
- By Me Only
- To All Agents

4. Click 'Add Task' to start building your template

Edit Activity Schedule :: Hot Buyer

Edit Activity Schedule

Activity Schedule: *

:: Tasks Involved ::

Access Template:

5. Enter in the task details and click 'save'

Edit Activity Task :: Call to build relationship

Task Start: Activity Started

Headline: *

Description:

Responsible Role:

Select Default Staff (Optional):

- Joe Franks (Sales Representative)
- Melanie Thompson (Sales Representative)

Assign Action:

Selected Actions:

- Create Letter Prospecting Letter [Edit]

**Note: There are two types of 'Responsible Roles' you can choose from when setting up your template. The roles of a staff member from their staff card.*

:: Staff : John Smith

Staff Details | Staff Photos | Access | Tasks | Contacts | Properties | Targets | Debits/Credits

Enable SMS for this mobile number

Email: * john@agentbox.com.au

Home Address:

Role: * Director

Agent Split %:

Website Staff Profile:

Show on website:

- My Listings
- My Open Homes
- My Sold Properties
- My Testimonials
- Our Staff

Or the role used to assign the agent to a property listing.

:: Listing : #1P0001 - 1 Jones Street, Copacabana

Full View

General | For Sale | Features | Open Homes | Agents & Contacts | Resources | Commission

:: Assign related Agents ::

Role: Selling Agent (unchecked to de-select)

Agent: Listing Agent, Property Manager, Associate Agent, Selling Agent, Property Assistant, Referral Agent, Appraisal Agent

Selected Agents:

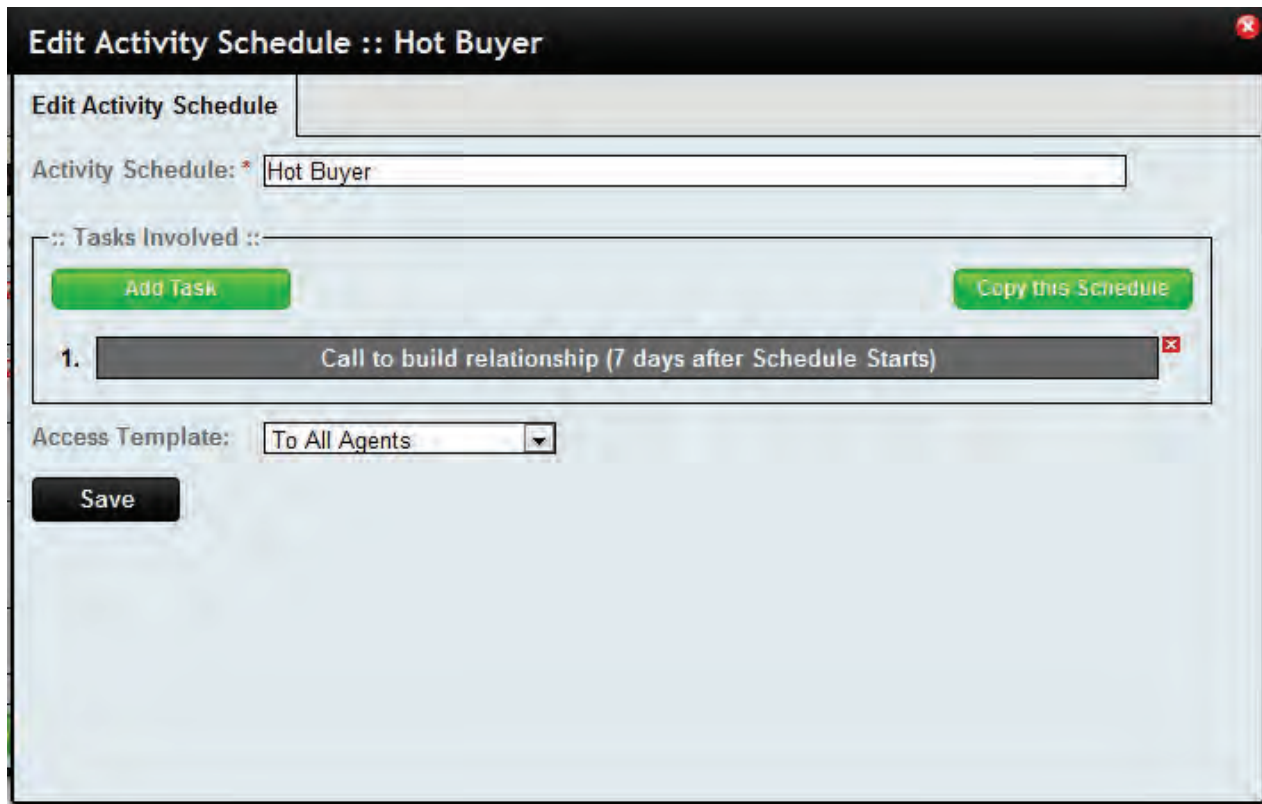
Appear on Site:

- John Smith (Listing Agent)
- John Smith (Selling Agent)

Save

This allows the responsible staff member of the task to be drawn from the contact or property you are applying the schedule to rather than only allowing one responsible staff member per template.

6. Repeat steps 4 and 5 till all tasks for the schedule have been added then click 'Save' to finish.



7. The new template will now be available in the 'Select Schedule' drop down menu when you [apply an activity schedule](#) to a contact or property

Apply Activity Schedule

How do I apply an Activity Schedule?

1. Click apply an activity schedule from your [Property](#), [Contact](#) or the [Task view](#) screen.
2. Select the template from the select schedule drop down.
3. Enter the start date, related contacts and properties and click save and proceed.

:: Apply Activity Schedule : ✖

Step 1 of 2 - Select Activity Schedule

Activity Schedule	Confirm Task Roles	
Select Schedule: *	New Listing ▼	
Start Date:	18	11 2011
Assign Contact:	<input type="text"/>	<input type="button" value="Add"/>
Selected Contact(s):	<input checked="" type="checkbox"/> Samantha Jones	
Assign Property:	<input type="text" value="Enter a Property Street, Suburb or ID (Optional)"/>	<input type="button" value="Add"/>
Selected Properties:	<input checked="" type="checkbox"/> 1P0001 - 1 Jones Street, Copacabana	

4. Ensure there is an allocated staff member for all roles in the template. In this example there are 2 roles responsible for the tasks in this schedule however only the listing agent role has an assigned staff member.

:: Apply Activity Schedule :

Step 2 of 2 - Confirm Allocated Staff

Activity Schedule
Confirm Task Roles

:: Select Role to Edit (Optional) ::

Role:	<div style="border: 1px solid gray; padding: 2px;">▼</div>	
Tasks Involved:	<div style="border: 1px solid gray; padding: 2px;">Admin (Schedule Starts)</div> <div style="border: 1px solid gray; padding: 2px;">Listing Agent (after Schedule Starts)</div>	

:: Confirm Allocated Staff ::

Allocated Staff: *	<div style="border: 1px solid gray; padding: 2px;"> <input checked="" type="checkbox"/> John Smith (Listing Agent) </div>
--------------------	---

« Previous Step

Finish

To allocate a staff member to manage all Admin related tasks, select Admin from the role drop down menu.

Search for the staff member and click Add.

**Note: If the template has tasks which have a property role as the responsible role (e.g. Listing Agent) and this staff member is not attached to the property as the listing agent in the agents and contacts tab this will not work.*

Website

Website (If using an Agentbox Website)



In 'Website' Master users can edit text, feature properties, re-order staff etc on the website.

[How do I edit the website using the CMS \(Content Management System\)?](#)

[How do I change the Feature Property on my homepage?](#)

[How do I add/edit testimonials on my website?](#)

Edit Website Content

How do I edit the website using the CMS (Content Management System)?

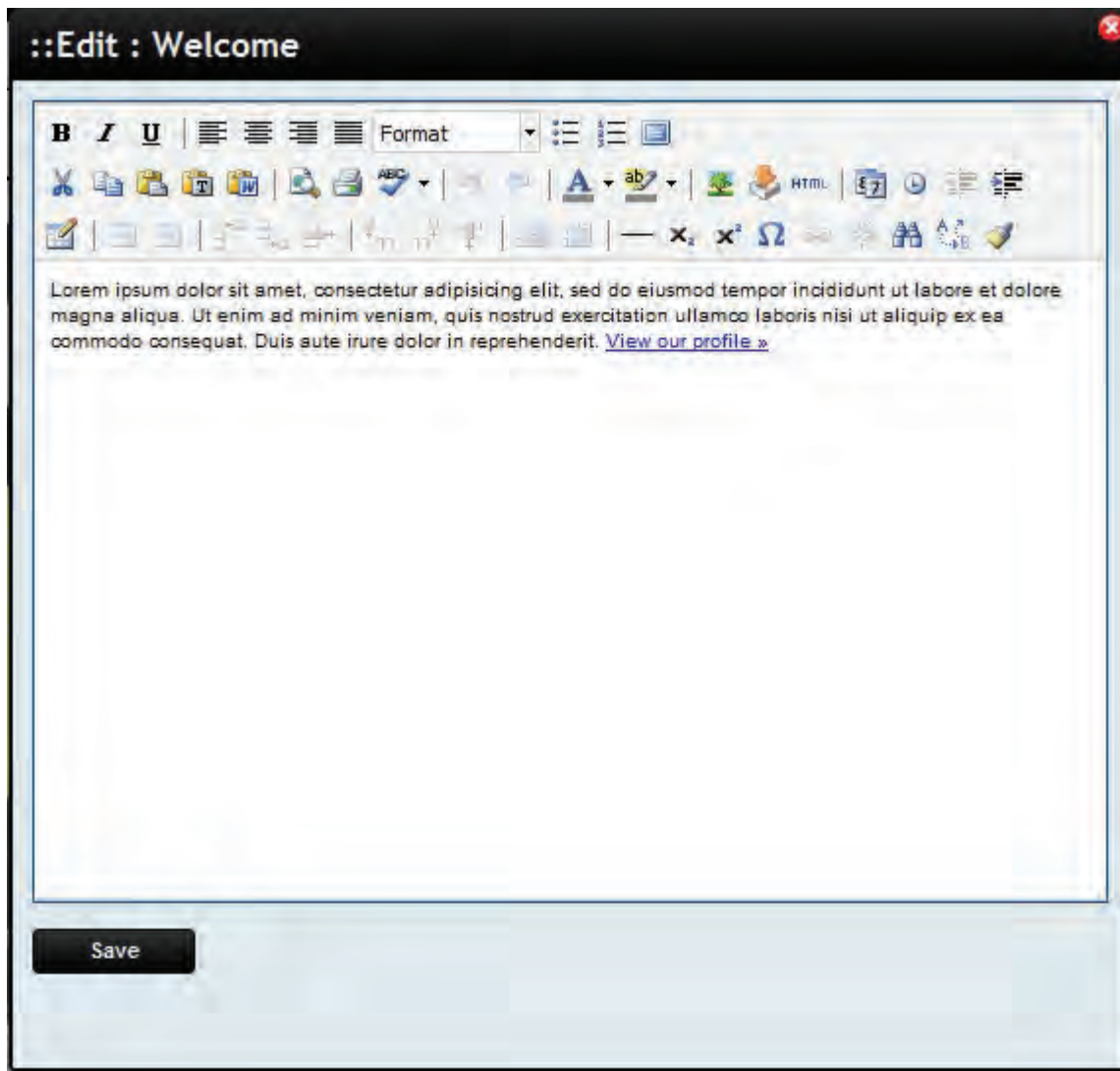
1. Click on Website from the main menu



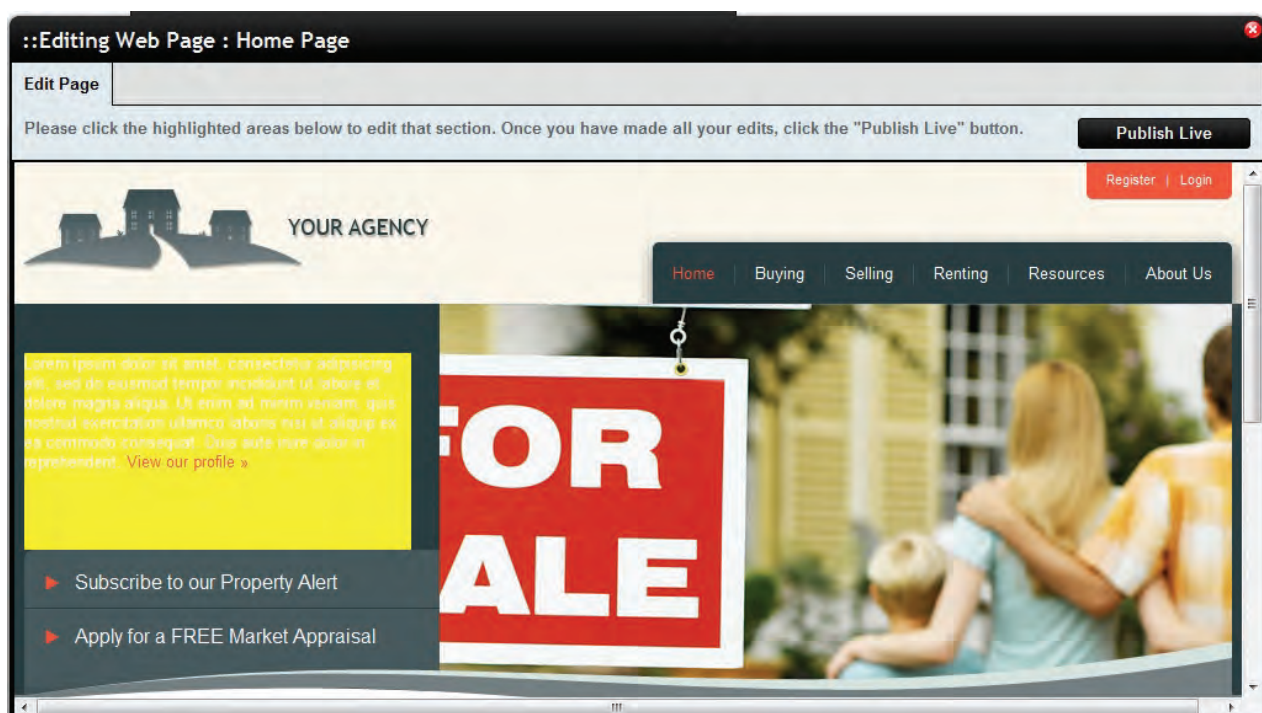
2. Click on the page you would like to edit from the left panel and the page will open in a centre panel.

A screenshot of the Agentbox Training Room website editing interface. The interface is titled "Editing Web Page : Home Page". On the left, there is a "Website" sidebar with a "Web Pages" section containing a list of pages: Home Page, Contact Us, Other, Buying, Selling, Renting, Resources, and About Us. The "Home Page" is selected. Below the list are "Image Library" and "Documents" sections. The main editing area shows a preview of the home page with a yellow highlight over a text block. The text block contains placeholder text and a "View our profile" link. Below the text block are two call-to-action buttons: "Subscribe to our Property Alert" and "Apply for a FREE Market Appraisal". The top right of the editing area has a "Publish Live" button and "Register | Login" links.

3. Click on the yellow areas to open the Edit box. Edit the text, insert images and links as required then click save.



4. Preview the changes then click Publish Live to update your website.



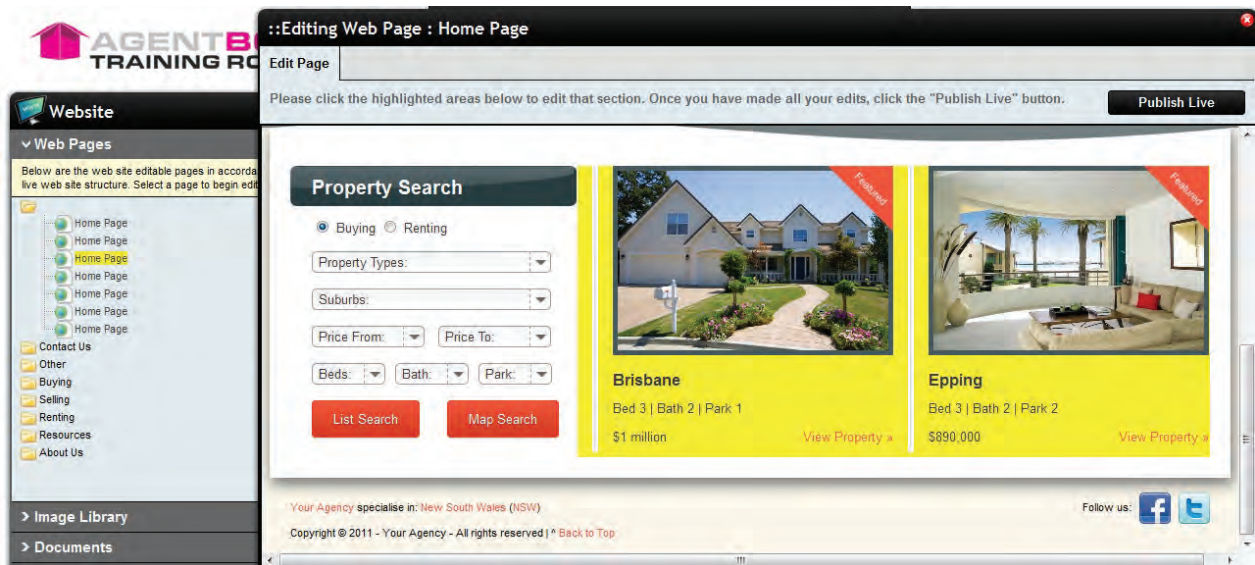
Feature Property

How do I change the feature properties on my homepage?

1. Click on Website from the main menu



2. Click on the Home Page from the left panel and the page will open in a centre panel.



3. Click on the feature property you would like to change and the edit window will appear.
To add a new property, search for the address, click add then click save.
To remove a property un-tick the check box then click save.



4. Preview the changes then click Publish Live to update your website.

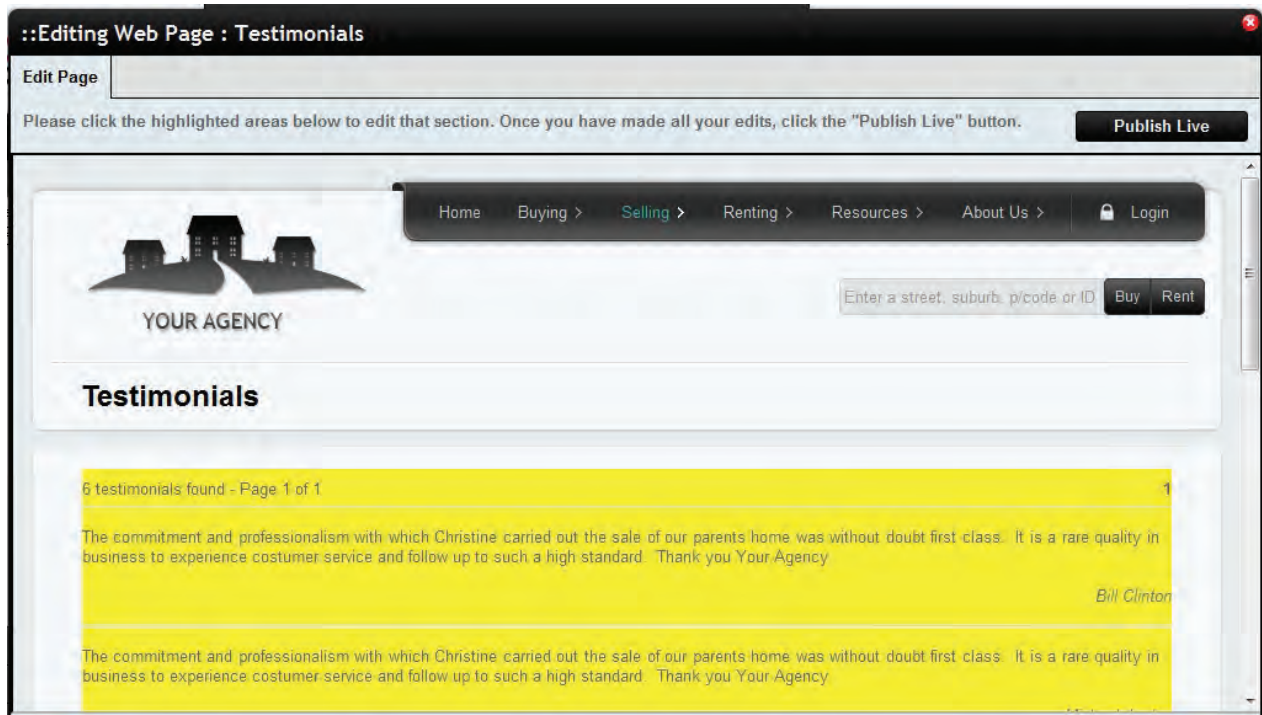
Testimonials

How do I add/edit testimonials on my website?

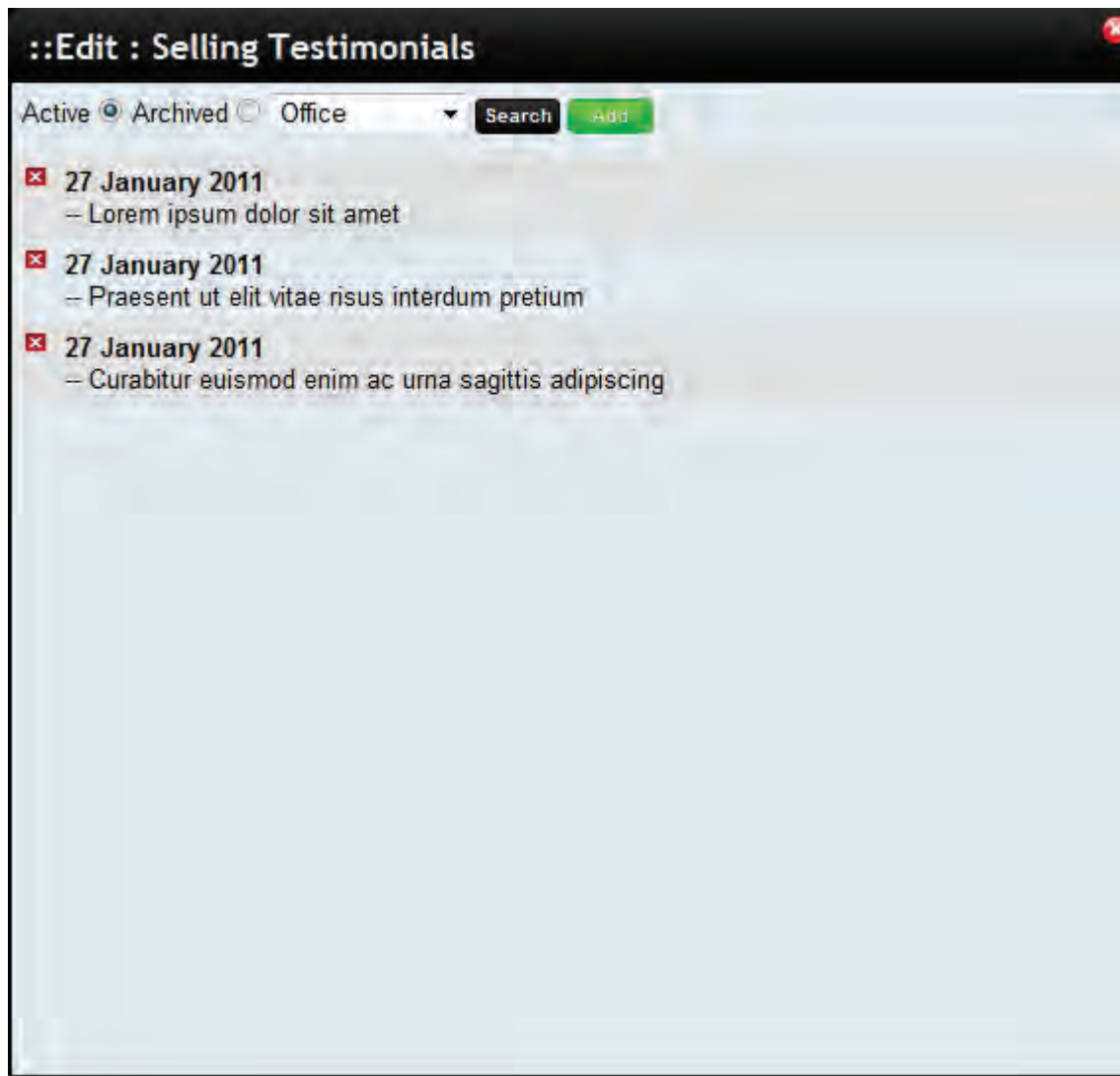
1. Click on Website from the main menu



2. Click on the Home Page from the left panel and the page will open in a centre panel



3. Click the yellow shading and the edit panel will appear.



4. You can add a testimonial to the office or a staff member by specifying in the drop down menu before clicking Add.
or you can edit an existing testimonial by clicking on the date.

Reports

Reports



In Reports you can generate stocklist and open home reports, agent, property, contact and performance reports.

[How do I access and create a report?](#)

[How do I create a property stocklist?](#)

You might also like...

[How do I print a detailed property report?](#)

[How do I print a detailed contact report?](#)

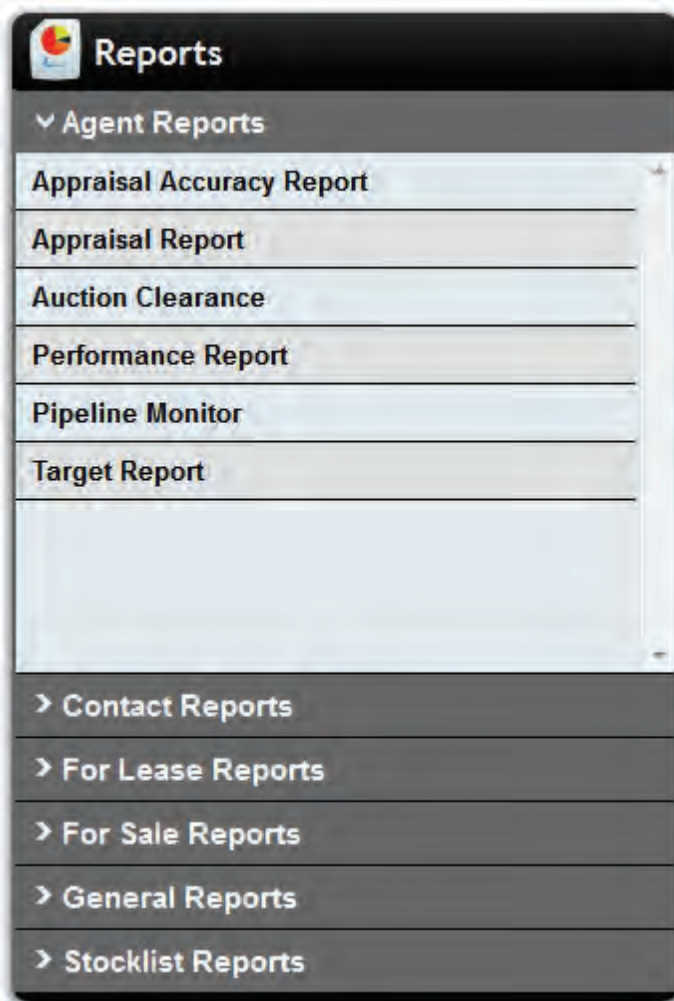
View & Generate Reports

How do I view and generate reports?

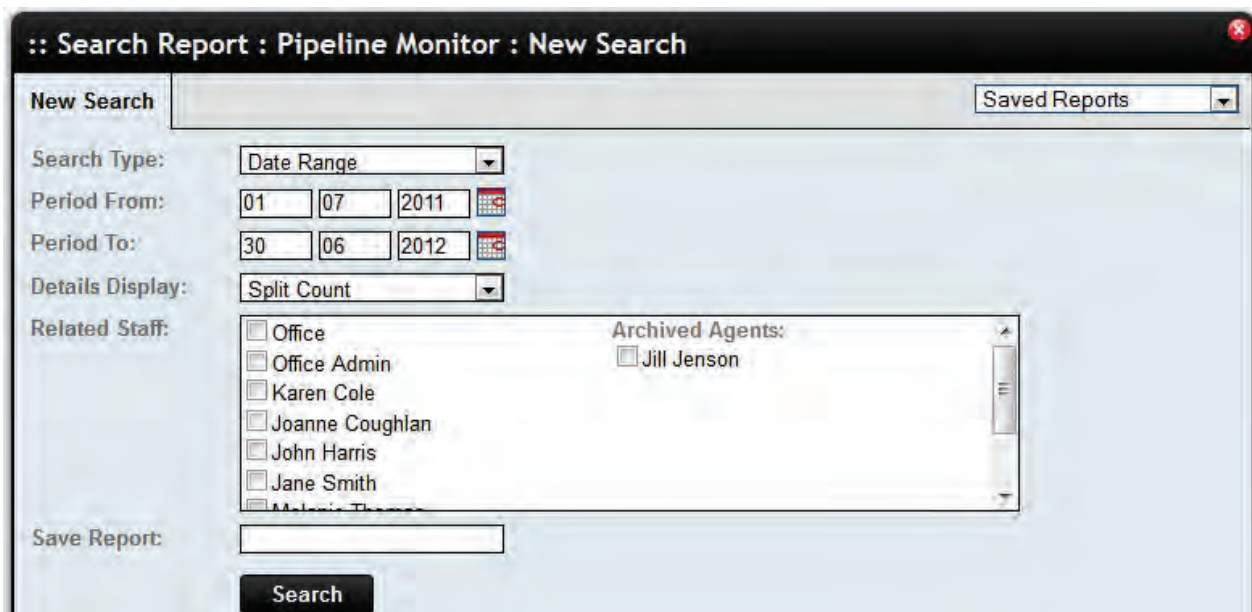
1. Click on Reports from the main menu



2. Click on a Report Category on the left panel e.g. Agent Reports



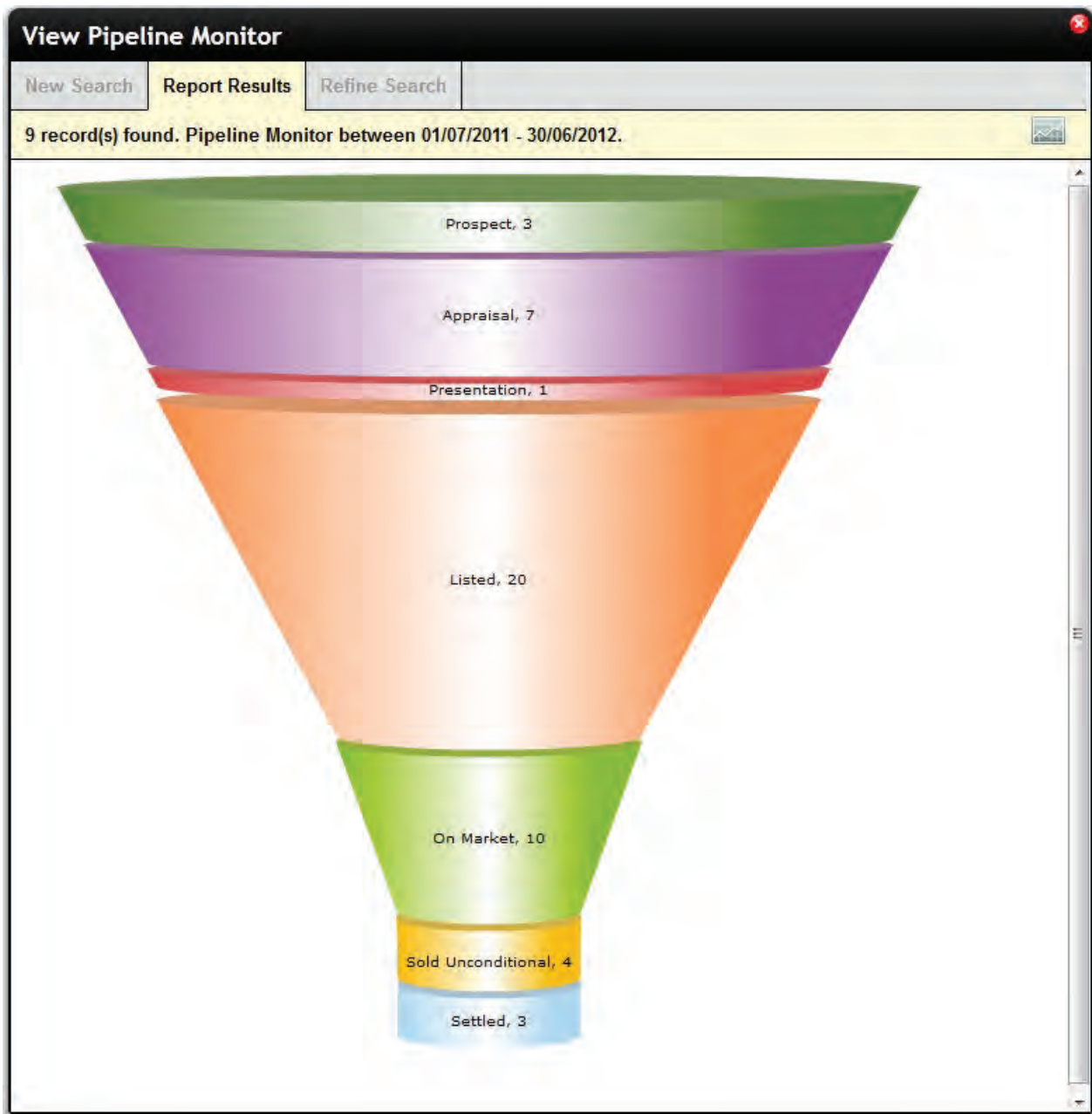
3. Click on the report you would like to create e.g. Pipeline Monitor
4. Select a date range, related staff member and enter name of the report if you wish to save it.



5. Click on 'Search'

6. The results or graph will appear.

**Note: You can re-size the results window by dragging the corners of the panel.*



7. To view or print a more detailed report click on the 'View Data Detail' action icon 

View Pipeline Monitor									
New Search	Report Results	Refine Search							
9 record(s) found. Pipeline Monitor between 01/07/2011 - 30/06/2012.									
Staff	Prospect	Appraisal	Presentation	Cancelled/Missed Appraisal	Listed	On Market	Sold (Unconditional)	Settled	
Office Admin	0	0	0	0	0	0	0	0	
Karen Cole	0	0	0	0	0	0	0	0	
Joanne Coughlan	0	3	0	0	9	5	0	0	
John Harris	0	0	0	0	0	0	0	0	
Jill Jenson	0	0	0	0	0	0	0	0	
Jane Smith	1	1	1	0	7.5	3.5	0	0	
Melania Thomas	0	1	0	0	1	1	1	0	
Marcus Thompson	0	0	0	0	0.5	0.5	0	0	
Joseph Western	0	0	0	0	0	0	0	0	
Total Split	1	5	1	0	18	10	1	0	
Average Split	0.11	0.56	0.11	0	2	1.11	0.11	0	
Unassigned Properties	2	2	0	0	2	0	3	3	
Total Properties	3	7	1	0	20	10	4	3	
Average Properties	0.33	0.78	0.11	0	2.22	1.11	0.44	0.33	

8. You can now use the action icons to export your report to a CSV, Print to a PDF or view the data as a Graph, respectively.

Generate Property Stocklist

How do I generate a Property Stocklist?

1. Click on the Reports icon from the Main Menu



2. Click on the Stock list Reports category

3. Select the report you wish to generate.

**Note: If you would like to customise the design and content of this report please contact us at support@agentbox.com.au for a quote.*

4. Enter search requirements you wish to use to refine your Stocklist.

:: Search Report : For Sale (Headline Only) : New Search

New Search Saved Reports

Type: Residential For Sale/Rental: PT & Auction

Category:
 Acreage
 Apartment
 Block Of Units
 House
 Land
 Status:
 Appraisal
 Available
 Deposit Taken
 Exchanged
 Leased

State: NSW

Regions:
 Blue Mountains & Surrounds
 Canterbury/bankstown
 Central Coast & Region
 Central Tablelands
 Central West Slopes

Suburb(s): Add (uncheck from below to delete a Suburb)

Selected Suburbs:

Search

5. Click on 'Search'
6. The results will appear.

View For Sale (Headline Only)

New Search **Report Results** Refine Search

3 record(s) found. For Sale (Headline Only)

ID	Address	Assigned Staff	Price	Status
1P0001	1 Jones Street, Copacabana	John Smith	\$1,250,000	Available
1P0002	Unit 6/12 Del Rio Drive, Copacabana AUCTION:Thursday, 20/10/2011	John Smith	\$950,000	Offline
1P0003	52 Elizabeth Street, Surry Hills	John Smith	\$150,000	Sold

7. You can now use the action icons to export your report as a CSV or Print as HTML. Please refer to [Printer Settings](#).

For Sale

04 April, 2012



COPACABANA, 1 Jones Street
LUXURY BALINESE INSPIRED RESIDENCE

bed 3 bath 4 car 2

Don't miss out on this one! Relax in your open plan living area, opening onto an outdoor entertaining area overlooking the infinity pool and breathtaking ocean views. Three large bedrooms, all contain en suites and built in wardrobes, the master features 270 degrees of

Contact Agent

Jane Smith | 0400000000



COPACABANA, Unit 6/12 Del Rio Drive
OASIS BY THE SEA

bed 3 bath 2 car 2

AUCTION | Thu 20/10/2011 1:00pm

Low maintenance living is ensured in this superbly appointed, large 3 bedroom luxury penthouse apartment. Stunning views of Copacabana Beach, ocean and headland are captured from the open plan living area which leads out through the bi-fold doors onto the

Offers over \$960,000

Jane Smith | 0400000000



MANLY, Unit 6/13 Stuart Street
OASIS BY THE SEA

bed 2 bath 1 car 2

Low maintenance living is ensured in this superbly appointed, large 3 bedroom luxury penthouse apartment. Stunning views of Copacabana Beach, ocean and headland are captured from the open plan living area which leads out through the bi-fold doors onto the

Offers over \$600,000

Joanne Coughlan | 0403 194 706



MANLY, 20 Darley Road
FABULOUS FAMILY HOME MOMENTS AWAY FROM

bed 3 bath 1

This deceptively spacious semi presents as a fabulous family home. Blessed with generous proportions and appealing interiors, this family home has been renovated throughout and extends through to a beautiful open plan living area with modern kitchen. Here you can

\$1,000,000

Joanne Coughlan | 0403 194 706



SURRY HILLS, 52 Elizabeth Street
ENTERTAINERS' RETREAT WITH SUPERB HARBOUR

bed 3 bath 2 car 1

Created to provide a relaxed haven for the entertainer, this immaculate home offers an easy care residence with superb harbour views. It combines flowing interiors, sunlit outdoor areas and quality finishes to deliver a property of charm and style. Generous living spaces

\$1.65mil

Marcus Thompson



SYDNEY, 654 Victoria Street
LARGE FAMILY HOME

bed 4 bath 2 car 2

Large living area with stunning 280 degree views. To die for location surrounded by the hustle and bustle of the city below in its own tranquil serenity.

\$2,250,000

Marcus Thompson


Performance

Performance



In Performance a Master or Principal User can view a snapshot of actual verse target data at an individual agent or total office level.

A standard user can view only their target verse actual data.

- Every metric has a drill down report (click on the metric title) & accompanying graph (Click graph icon ) with the ability to layer comparison metrics
- You can view relevant metrics by Financial Year, Calendar Year, specific month and includes both totals and agent split e.g. total sales (agent involved) and total sales (attributable to agent)

[How do I view my office and agent performance?](#)


View Performance

How do I view my office and agent performance?

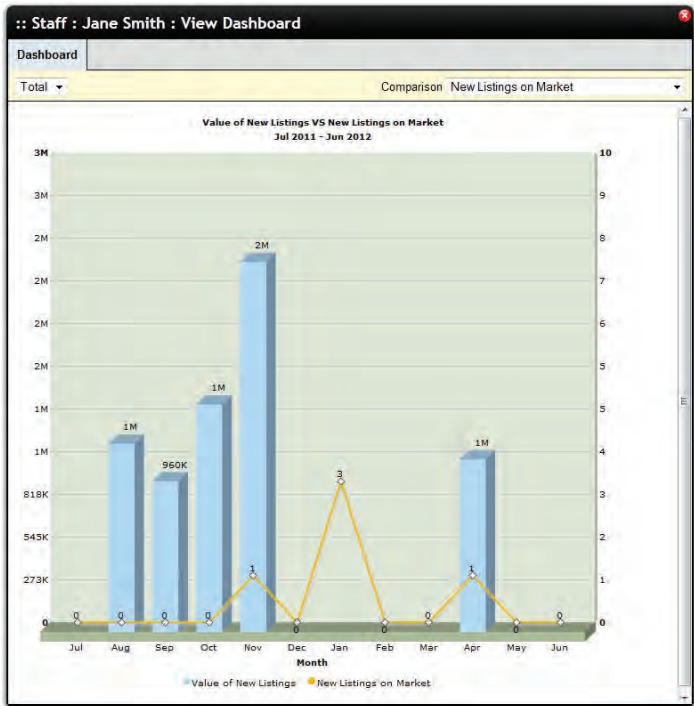
1. Click on Performance from the Main Menu



2. Select the financial year and office or relevant staff member from the drop down menus on the left panel.

3. Every metric has a drill down report (click on the metric title) & accompanying graph (Click graph icon ) with the ability to layer comparison metrics

Performance		
2011 ~ 2012 FY		Jane Smith
	Total	Split
Gross Commission Target		
Gross Commission	\$41,125.00	\$0.00
No. of Listings Target		
New Listings	9	8.5
New Listings on Market	5	4.5
Value of New Listings	\$7,070,000.00	\$6,590,000.00
Average Listing Value	\$785,555.56	\$732,222.22
No. of Sales Target		
Properties Sold	1	0
Value of Properties Sold	\$1,645,000.00	\$0.00
Average Sales Value	\$1,645,000.00	\$0.00
Average Gross Commission	\$41,125.00	\$0.00
Average Days on Market (all sold)	84	
Average Days on Market (Auctions Only)	0	
Average Days on Market (PT Only)	84	
Auction Day Clearance Rate	0%	
Auction Clearance Rate	0%	
Appraisals (Total Volume)	\$1,450,000.00	
No. of Appraisals	1	
% of Listed Appraisals	100%	
New Listings (For Lease)	1	



Portals

Portals

[How do I go about setting up a new portal feed for the office?](#)

[How can I check whether my property has successfully uploaded or updated on the portal?](#)

[What do I do if my property is not appearing on the portal?](#)

New Portal Set Up

Available Portals

Click on the portal to view the relevant steps to activate this service, if you have any additional requirements or the portal is not listed here please contact support@agentbox.com.au

- [Allhomes](#)
- [Campaign Track](#)
- [Commercial Real Estate](#)
- [Domain](#)
- [Home Away](#)
- [Homehound.com.au](#)
- [Homes247.com.au](#)
- [Homesguide.com.au](#)
- [Jewish Living](#)
- [Realestate.com.au](#)
- [Realcommercial.com.au](#)
- [Realestateview.com.au](#)
- [REIQ \(Realestate Institute of Queensland\)](#)
- [REIWA \(Realestate Institute of Western Australia\)](#)
- [Rent.com.au](#)
- [Rentfind.com.au](#)
- [\(Realestate Publications Australia \(repa.com.au, Homes Pictorial, Property Showcase\)](#)
- [Stayz](#)
- [The Homepage & MillonPlus](#)
- [Trade Me \(New Zealand\)](#)

You might also be interested in our [REST Professional Integration](#)

All Homes

Allhomes.com.au

1. Please ensure you have an active account or set one up with allhomes.com.au direct.
2. Email info@allhomes.com.au and cc support@agentbox.com.au requesting that Agentbox be the new XML uploader for your office commencing immediately.
3. Allhomes.com.au will then contact us direct with the activation details.
4. Once this portal is activated, you will receive an email from us confirming all listings will now be updated directly through Agentbox, and no further use of your previous provider or manual data entry through allhomes.com.au is required.



Campaign Track

Campaign Track

1. Please check your Agentbox agreement for any additional portal charges that may be payable before activating this service.
2. Contact your account manager at Campaign Track requesting that Agentbox be the new XML uploader for your office commencing immediately and cc support@agentbox.com.au
3. Campaign Track will issue your office access codes, if these are sent directly to you please forward to support@agentbox.com.au
4. Once this portal is set up you will receive an email confirming this feature has been set up and you can begin giving staff access through the Access tab in the Staff Profile Card.



Commercial Real Estate

CommercialRealestate.com.au

1. Portal feeds to CommercialRealestate.com.au go through your domain.com.au subscription with Agentbox. No additional portal charges apply.
2. Contact support@commercialrealestate.com.au or your domain.com.au account manager to confirm your subscription is linked to domain.com.au or to create a new account.

3. If you have activated your portal feed to domain.com.au from Agentbox no further steps are needed.
4. If you have not activated your domain.com.au portal feed from Agentbox please follow the following steps.

Domain.com.au

1. Please check your Agentbox agreement for any additional portal charges that may be payable before activating this service.
2. If you wish to export your properties to domain.com.au, email sales@domain.com.au and cc support@agentbox.com.au requesting that Agentbox be the new XML uploader for your office commencing immediately.
3. Domain will switch off all your products temporarily (such as priority placements) for the switch over to occur. Once this is done then they will turn the products back on. This will prevent any additional charges for the fresh upload.
4. Once this portal is set up at Agentbox, you will receive an email to confirm that your listings will be updated through Agentbox, and no further use of your previous provider is required.



Domain

Domain.com.au

1. Please check your Agentbox agreement for any additional portal charges that may be payable before activating this service.
2. If you wish to export your properties to domain.com.au, email sales@domain.com.au and cc support@agentbox.com.au requesting that Agentbox be the new XML uploader for your office commencing immediately.
3. Domain will switch off all your products temporarily (such as priority placements) for the switch over to occur. Once this is done then they will turn the products back on. This will prevent any additional charges for the fresh upload.
4. Once this portal is set up at Agentbox, you will receive an email to confirm that your listings will be updated through Agentbox, and no further use of your previous provider is required.



Home Away

HomeAway.com.au

1. Please check your Agentbox agreement for any additional portal charges that may be payable before activating this service.
2. If you wish to export your properties to HomeAway.com.au, please email your account manager or info@homeaway.com.au and cc support@agentbox.com.au requesting that Agentbox be the new XML

uploader for your office commencing immediately.

3. HomeAway will then contact us with the relevant set up details.

4. Once this portal is set up by Agentbox, you will receive an email to confirm that your listings will be updated through Agentbox, and no further use of your previous provider is required.



Homehound.com.au

Homehound.com.au

1. Please check your Agentbox agreement for any additional portal charges that may be payable before activating this service.

2. Ensure you have an active account or set one up with homehound.com.au by visiting their website.

3. Email support@agentbox.com.au requesting that Agentbox be the new XML uploader for your office commencing immediately.

4. Agentbox will then forward your request to homehound.com.au to complete the set-up process.

5. Once this portal is set up, you will receive an email from us confirming your listings will be updated through Agentbox, and no further use of your previous provider is required.



Homes247.com.au

Homes247.com.au

1. Please check your Agentbox agreement for any additional portal charges that may be payable before activating this service.

2. If you wish to export your properties to homes247.com.au, please email your account manager or info@homes247.com.au and cc support@agentbox.com.au requesting that Agentbox be the new XML uploader for your office commencing immediately.

3. Homes247 will then contact us with the relevant set up details.

4. Once this portal is set up by Agentbox, you will receive an email to confirm that your listings will be updated through Agentbox, and no further use of your previous provider is required.



Homesguide.com.au

Homesguide.com.au

1. Please check your Agentbox agreement for any additional portal charges that may be payable before activating this service.
2. If you wish to export your properties to homesguide.com.au, please email your account manager or info@homesguide.com.au and cc support@agentbox.com.au requesting that Agentbox be the new XML uploader for your office commencing immediately.
3. Homesguide will then contact us with the relevant set up details.
4. Once this portal is set up by Agentbox, you will receive an email to confirm that your listings will be updated through Agentbox, and no further use of your previous provider is required.



Jewish Living

Jewish Living

- 1) If you wish to export your properties to Jewishliving.com.au, please email your account manager or info@jewishliving.com.au and cc support@agentbox.com.au requesting that Agentbox be the new XML uploader for your office commencing immediately.
- 2) Jewish Living will then contact us with the relevant set up details.
- 3) Once this portal is set up by Agentbox, you will receive an email to confirm that your listings will be updated through Agentbox, and no further use of your previous provider is required.



Realestate.com.au

Realestate.com.au

1. If you wish to export your properties to realestate.com, please FAX the attached form to realestate.com.au, at 1300 134 554.
2. You should call your account manager to let them know you have faxed the form.
3. If you do not receive a reply within 48hours, please contact your account manager at realestate.com.au for a status update.

4. During this time please keep track of any manual changes you make to your listings on realestate.com.au as any made after they have sent the initial data to us may need to be updated again in your Agentbox CRM again on activation.

5. Once this portal is set up at Agentbox, you will receive an email to confirm that your listings will be updated through Agentbox, and no further use of you previous provider is required.



RealCommercial.com.au

RealCommercial.com.au

1. Portal feeds to realcommercial.com.au go through your realestate.com.au subscription with Agentbox. No additional portal charges apply.

2. Contact your realestate.com.au account manager to confirm you are subscribed to realcommercial.com.au

3. If you have activated your portal feed to realestate.com.au from Agentbox no further steps are needed.

4. If you have not activated your realestate.com.au portal feed from Agentbox please follow the following steps.

Realestate.com.au

1. If you wish to export your properties to realestate.com, please FAX the attached form to realestate.com.au, at 1300 134 554.

2. You should call your account manager to let them know you have faxed the form.

3. If you do not receive a reply within 48hours, please contact your account manager at realestate.com.au for a status update.

4. During this time please keep track of any manual changes you make to your listings on realestate.com.au as any made after they have sent the initial data to us may need to be updated again in your Agentbox CRM again on activation.

5. Once this portal is set up at Agent Box, you will receive an email to confirm that your listings will be updated through Agent Box, and no further use of you previous provider is required.

5. Realestate.com.au will automatically send any listings marked as 'Commercial' to the realcommercial.com.au website.

6. Once this portal is set up at Agent Box, you will receive an email to confirm that your listings will be updated through Agent Box, and no further use of you previous provider is required.



Realestateview.com.au

Realestateview.com.au

1. Please check your Agentbox agreement for any additional portal charges that may be payable before activating
2. If you wish to export your properties to Realestateview.com.au, please email your account manager or support@realestateview.com.au and cc support@agentbox.com.au requesting that Agentbox be the new XML uploader for your office commencing immediately.
3. Realestateview will then contact us with the relevant set up details.
4. Once this portal is set up by Agentbox, you will receive an email to confirm that your listings will be updated through Agentbox, and no further use of your previous provider is required.



REIQ

The Real Estate Institute of QLD

1. Ensure you have an active subscription with REIQ.com.au, the process for subscribing can be found here.
2. If you wish to export your properties to www.reiq.com.au, please email your account manager or busserv@reiq.com.au and cc support@agentbox.com.au requesting that Agentbox be the new XML uploader for your office commencing immediately.
3. REIQ will then contact us with the relevant set up details.
4. Once this portal is activated by Agentbox, you will receive an email to confirm that your listings will be updated through Agentbox, and no further use of your previous provider is required.



REIWA

The Real Estate Institute of Western Australia

- 1) If you wish to export your properties to www.reiwa.com.au, please email your account manager or support@reiwa.com.au and cc support@agentbox.com.au requesting that Agentbox be the new XML uploader for your office commencing immediately.
- 3) REIWA will then contact us with the relevant set up details.
- 4) Once this portal is activated by Agentbox, you will receive an email to confirm that your listings will be updated through Agentbox, and no further use of your previous provider is required.



[Rent.com.au](https://www.rent.com.au)

Rent.com.au

1. Please check your Agentbox agreement for any additional portal charges that may be payable before activating this service.
2. If you wish to export your properties to Rent.com.au, please email your account manager or info@rent.com.au and cc support@agentbox.com.au requesting that Agentbox be the new XML uploader for your office commencing immediately.
3. Rent will then contact us with the relevant set up details.
4. Once this portal is set up by Agentbox, you will receive an email to confirm that your listings will be updated through Agentbox, and no further use of your previous provider is required.



[Rentfind.com.au](https://www.rentfind.com.au)

Rentfind.com.au

1. Please check your Agentbox agreement for any additional portal charges that may be payable before activating this service.
2. If you wish to export your properties to Rentfind.com.au, please email your account manager or info@rentfind.com.au and cc support@agentbox.com.au requesting that Agentbox be the new XML uploader for your office commencing immediately.
3. Rentfind will then contact us with the relevant set up details.
4. Once this portal is set up by Agentbox, you will receive an email to confirm that your listings will be updated through Agentbox, and no further use of your previous provider is required.



Real Estate Publications Australia

Realestate Publications Australia (repa.com.au, Homes Pictorial, Property Showcase)

1. Please check your Agentbox agreement for any additional portal charges that may be payable before activating this service.
2. If you wish to export your properties to REPA.com.au, please email your account manager or info@REPA.com.au and cc support@agentbox.com.au requesting that Agentbox be the new XML uploader for your office commencing immediately.
3. REPA will then contact us with the relevant set up details.
4. Once this portal is set up by Agentbox, you will receive an email to confirm that your listings will be updated through Agentbox, and no further use of your previous provider is required.



Stayz

Stayz.com.au

1. Portal feeds to stayz.com.au go through your domain.com.au subscription with Agentbox. No additional portal charges apply.
2. Contact support@stayz.com.au or your domain.com.au account manager to confirm your subscription is linked to domain.com.au or to create a new account.
3. If you have activated your portal feed to domain.com.au from Agentbox no further steps are needed.
4. If you have not activated your domain.com.au portal feed from Agentbox please follow the following steps.

Domain.com.au

1. Please check your Agentbox agreement for any additional portal charges that may be payable before activating this service.
2. If you wish to export your properties to domain.com.au, email sales@domain.com.au and cc support@agentbox.com.au requesting that Agentbox be the new XML uploader for your office commencing immediately.
3. Domain will switch off all your products temporarily (such as priority placements) for the switch over to occur. Once this is done then they will turn the products back on. This will prevent any additional charges for the fresh upload.
4. Once this portal is set up at Agent Box, you will receive an email to confirm that your listings will be updated through Agent Box, and no further use of your previous provider is required.

5. Domain will automatically send any listings marked as 'Holiday' to the stayz.com.au website.



The Homepage & MillionPlus

The Home Page and Million Plus.com.au

1. Please check your Agentbox agreement for any additional portal charges that may be payable before activating this service.
2. If you wish to export your properties to The Home Page and Million Plus.com.au, please email your account manager or info@thehomepage.com.au / info@millionplus.com.au and cc support@agentbox.com.au requesting that Agentbox be the new XML uploader for your office commencing immediately.
3. The Home Page and Million Plus will then contact us with the relevant set up details.
4. Once this portal is set up by Agentbox, you will receive an email to confirm that your listings will be updated through Agentbox, and no further use of your previous provider is required.



Trade Me

Trademe.co.nz


1. Please check your Agentbox agreement for any additional portal charges that may be payable before activating this service.
2. If you wish to export your properties to Trademe.com.au, please email your account manager or info@Trademe.co.nz and cc support@agentbox.com.au requesting that Agentbox be the new XML uploader for your office commencing immediately.
3. Trademe will then contact us with the relevant set up details.
4. Once this portal is set up by Agentbox, you will receive an email to confirm that your listings will be updated through Agentbox, and no further use of your previous provider is required.

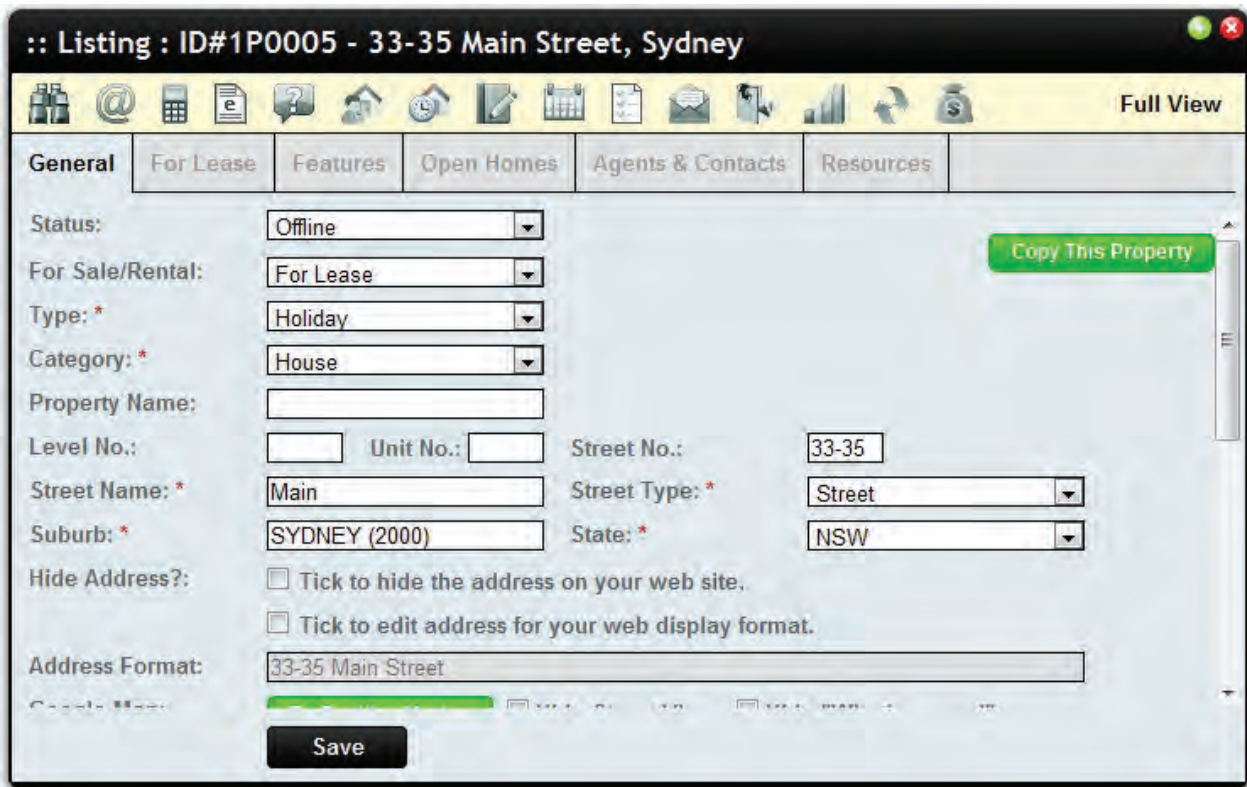
Portal Feed Logs

How can I check whether my property has successfully uploaded or updated on the portal?

**Note:- Only portals that support feedback logs will be shown.*

1. [Search for your Property](#) and open the [Property Card](#)

2. You can check the portal feed logs for a property by clicking the portal feed action icon  at the top of the property card. If there is an error message, make the required corrections to the property and hit save to resend to the portal.



:: Listing : ID#1P0005 - 33-35 Main Street, Sydney

Full View

General | For Lease | Features | Open Homes | Agents & Contacts | Resources

Status: Offline

For Sale/Rental: For Lease

Type: * Holiday

Category: * House

Property Name:

Level No.: Unit No.: Street No.: 33-35

Street Name: * Main Street Type: * Street

Suburb: * SYDNEY (2000) State: * NSW

Hide Address?: Tick to hide the address on your web site.
 Tick to edit address for your web display format.

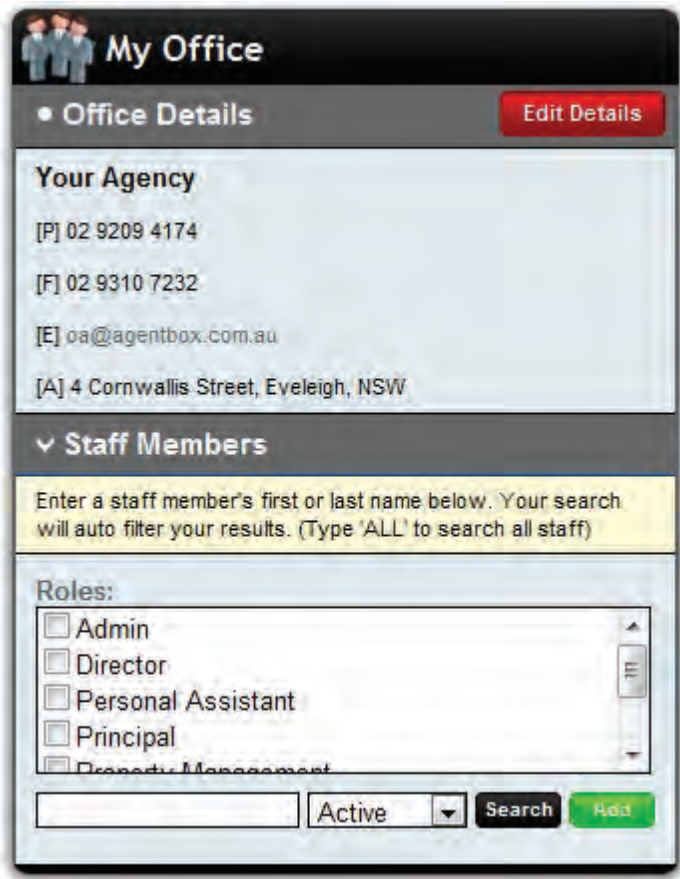
Address Format: 33-35 Main Street

Save

3. Alternatively you can access the portal logs by clicking on My Office from the main menu.



2. Click the red Edit Details button on the [Left Panel](#)



3. Click on the Portal Logs tab and select the portal from the Portal drop down menu to view the feed.

:: Office : Agentbox

Office Details | Resources | Portal Exports | **Portal Logs** | Monthly Income | Supplier Items


Portal: Realestate.com.au 1 | 2 >>

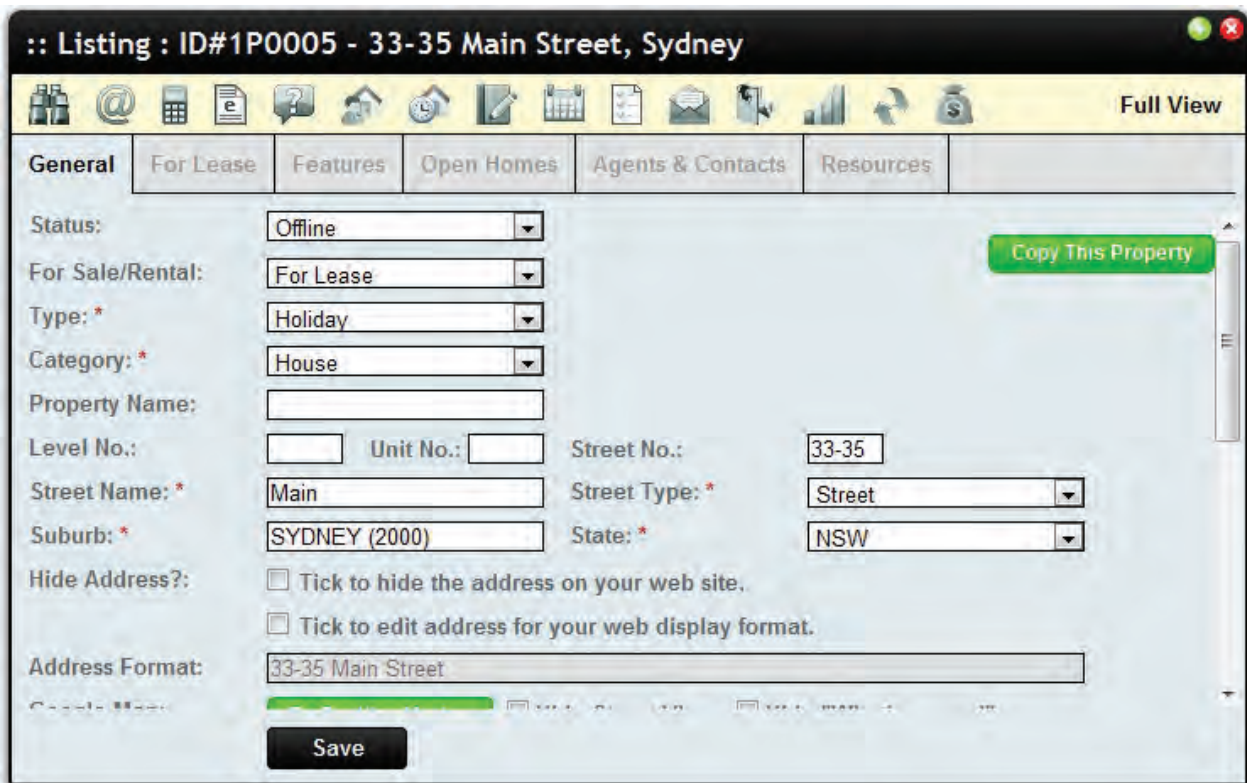
Export Date	Processed Date	Export Status
13/04/12 12:05pm	13/04/12 12:07pm	Processed
12/04/12 12:05pm	12/04/12 12:06pm	Processed
12/04/12 10:05am	12/04/12 10:07am	Processed
11/04/12 04:05pm	11/04/12 04:06pm	Processed
11/04/12 03:05pm	11/04/12 03:06pm	Processed
06/04/12 02:05pm	06/04/12 02:07pm	Processed
05/04/12 05:05pm	05/04/12 05:07pm	Processed
05/04/12 03:05pm	05/04/12 03:07pm	Processed
05/04/12 12:05pm	05/04/12 12:06pm	Processed
05/04/12 10:05am	05/04/12 10:06am	Processed
04/04/12 09:05pm	04/04/12 09:05pm	Processed
03/04/12 01:05pm	03/04/12 01:05pm	Processed
03/04/12 10:05am	03/04/12 10:05am	Processed
03/04/12 05:05pm	03/04/12 05:05pm	Processed

Portal Issues

My property is not appearing correctly on a portal?

1. You can check the portal feed logs (supported portals only) for a property by clicking the portal feed

action icon  at the top of the property card. If there is an error message, make the required corrections to the property and hit save to resend to the portal.



:: Listing : ID#1P0005 - 33-35 Main Street, Sydney Full View

General For Lease Features Open Homes Agents & Contacts Resources

Status: Offline

For Sale/Rental: For Lease

Type: * Holiday

Category: * House

Property Name:

Level No.: Unit No.: Street No.: 33-35

Street Name: * Main Street Type: * Street

Suburb: * SYDNEY (2000) State: * NSW

Hide Address?:
 Tick to hide the address on your web site.
 Tick to edit address for your web display format.

Address Format: 33-35 Main Street

Save Copy This Property

2. If you have checked the portal logs and there is no issue recorded please contact support@agentbox.com.au who will investigate this issue for you. Please allow a minimum of 1 hour for the feed to be sent and only call/email support if 4 hours or more have passed.

Changing a property status

Agentbox is limited to what can be sent to the various portals regarding a property status. The status flow in Agentbox works as follows and it is important for both reporting and advertising that you update the data correctly.

Available – Property advertised on your website and portals as **available**

Under Contract – Property advertised on your website and portals as **under contract** (terminology is customisable on your website)

Exchanged – Conditional – Property advertised on your website and portals as **under contract** or **exchanged** (terminology is customisable on your website)

Exchanged – Unconditional Property advertised on your website and portals as **SOLD – using the Exchanged date as the 'sold date'**

Sold/Settled –Property remains advertised on your website and portals as **SOLD**

Letter Generator

Letter Generator



You can access the Letter Generator using the Letter Generator Action Icon on the property and contact card. You can create and edit letters and letter templates for single use and mail merges using the Letter Generator.

[How do I create a Letter Template?](#)

[How do I copy a Letter Template?](#)

[How do I edit a Letter Template?](#)


[How do I delete a Letter Template?](#)

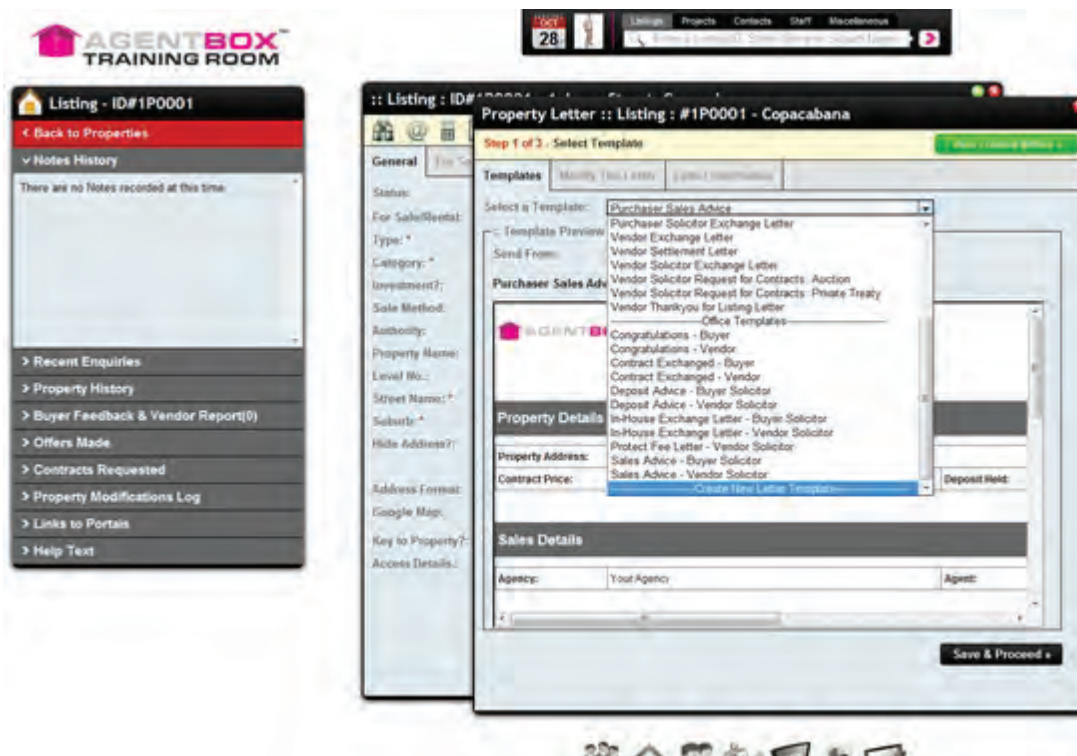
[How do I share a Letter Template to other staff?](#)

[How do I conduct a mail merge?](#)


Create a Letter Template

How do I create a letter template?

1. Click on the Create Letter icon  at the top of the contact or property card.
2. In the Select a Template drop down, scroll down and hit the Create New Letter Template button at the bottom of the list.

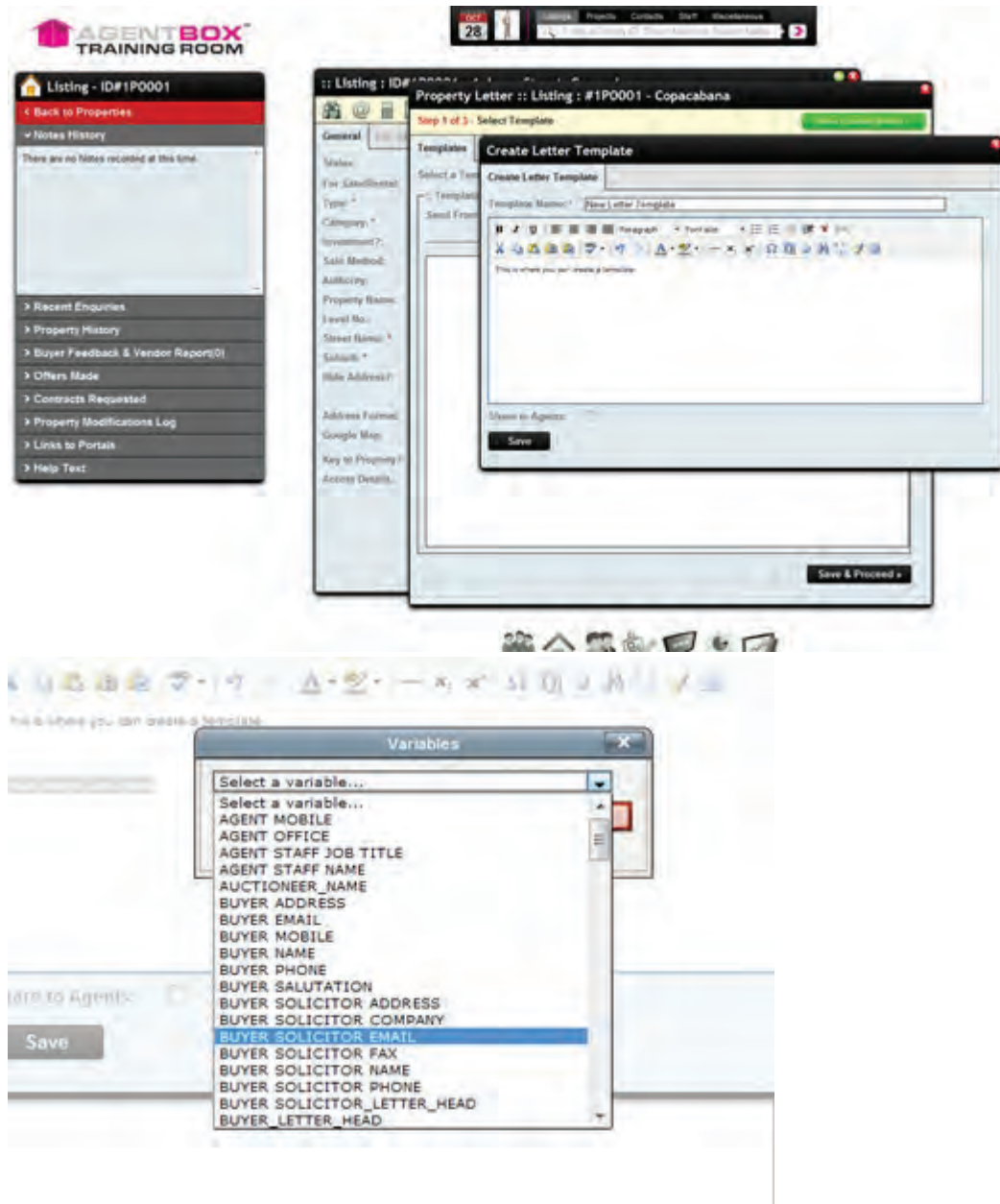


3. The Edit Letter Template window will appear which allows you to:
 - Name the template
 - Add/Edit the text in the template using the formatting tools. (If pasting from Microsoft

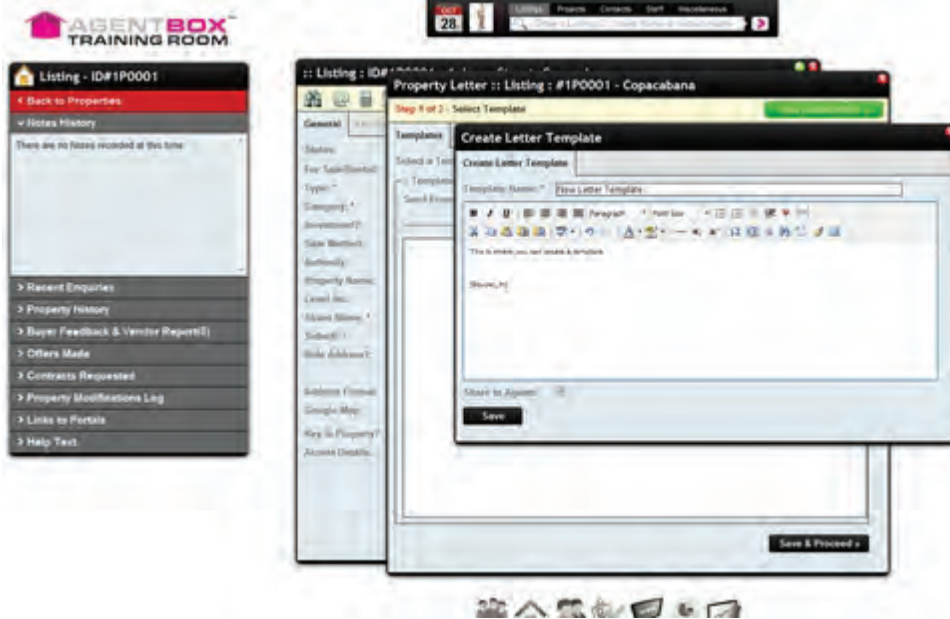
Word, please use the paste from word tool  or better yet only paste plain text from notepad.)

- Add/edit the [variables](#) using the red **V** icon.

**Hint - When typing, click shift + enter to proceed on the next line. 'Enter' will make a new paragraph.*




4. Once you have finished creating the letter you are given the option of sharing the template. If you tick the Share to Agents checkbox, the letter template will be able to be viewed by anyone in the office. If this template is only for your own use, leave the checkbox empty and only you will be able to view the template.

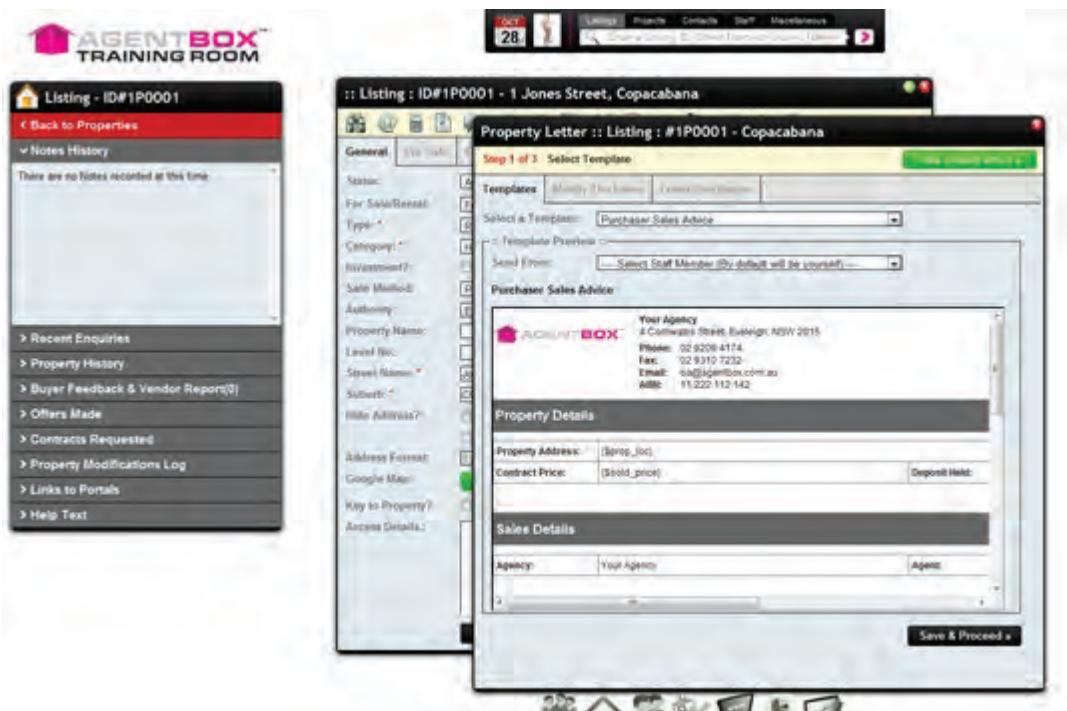


5. Lastly, click Save. You will be redirected back to the Select Template page and your newly created template can be selected from the drop down list.

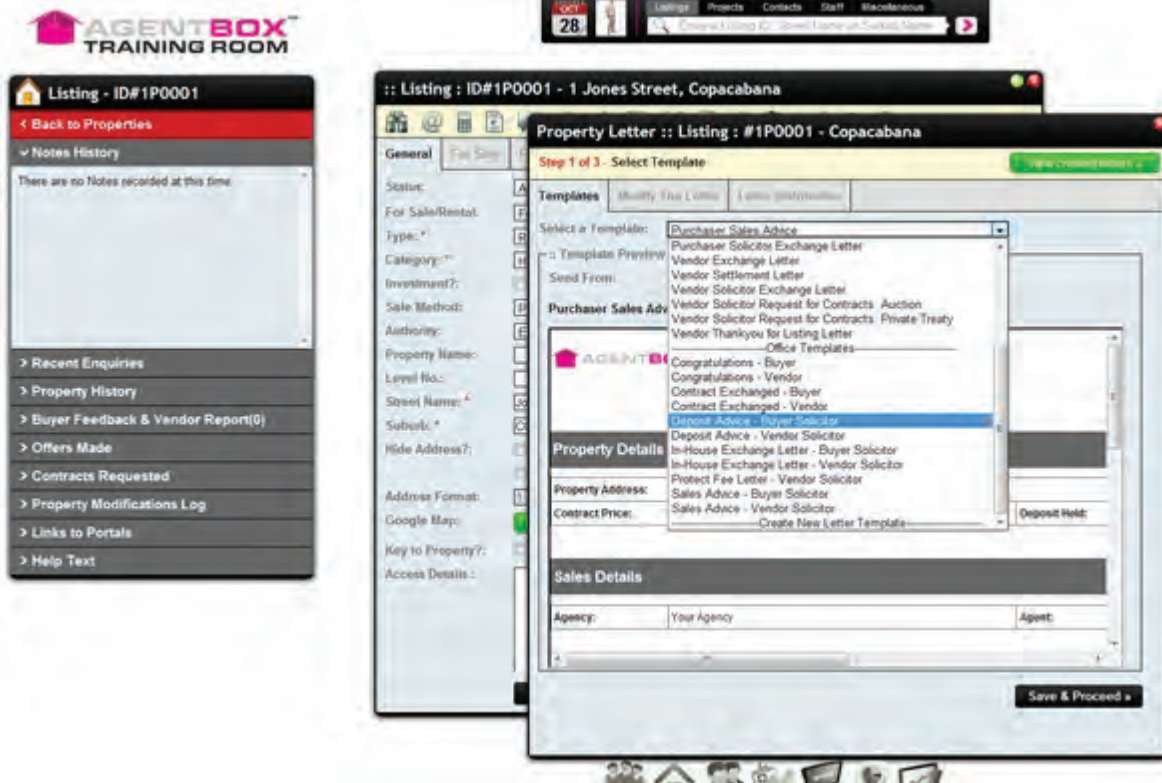
Copy a Letter Template

How do I copy an existing letter template?

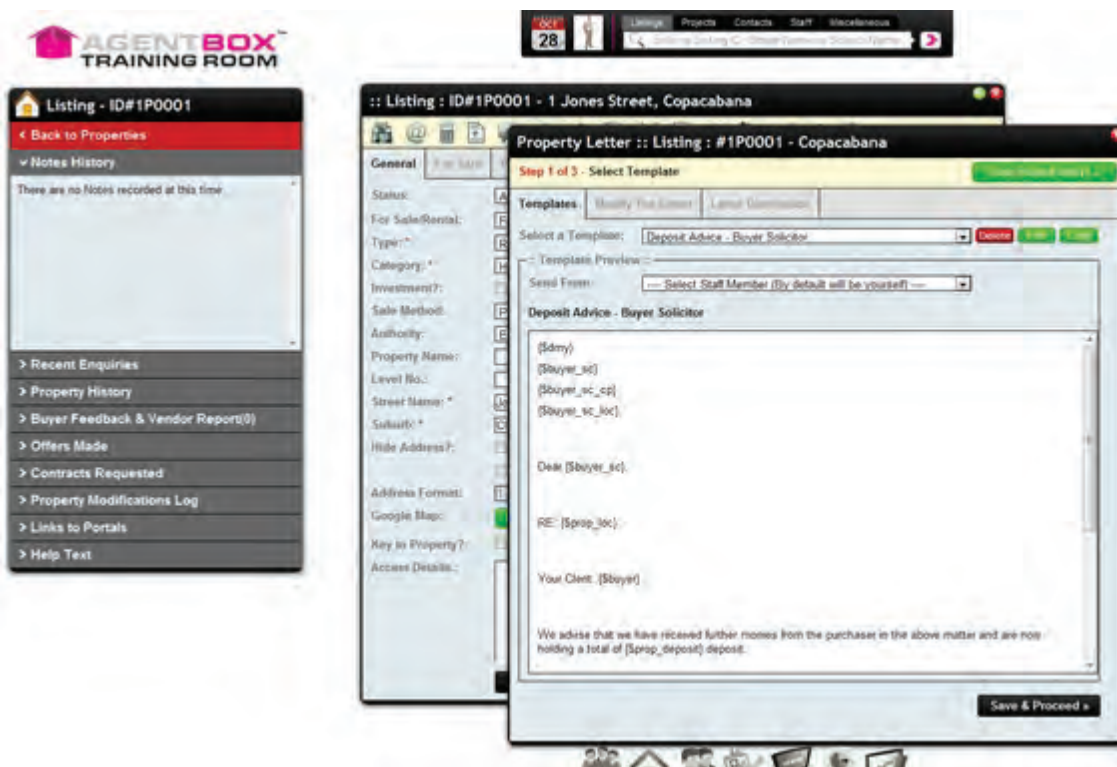
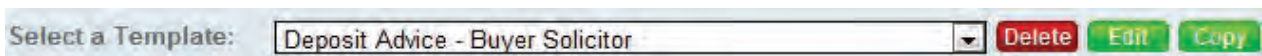
1. Click on the create letter icon  at the top of the contact or property card.




2. Click on the Select A Template drop down menu at the top of the panel and choose the template you would like to copy.



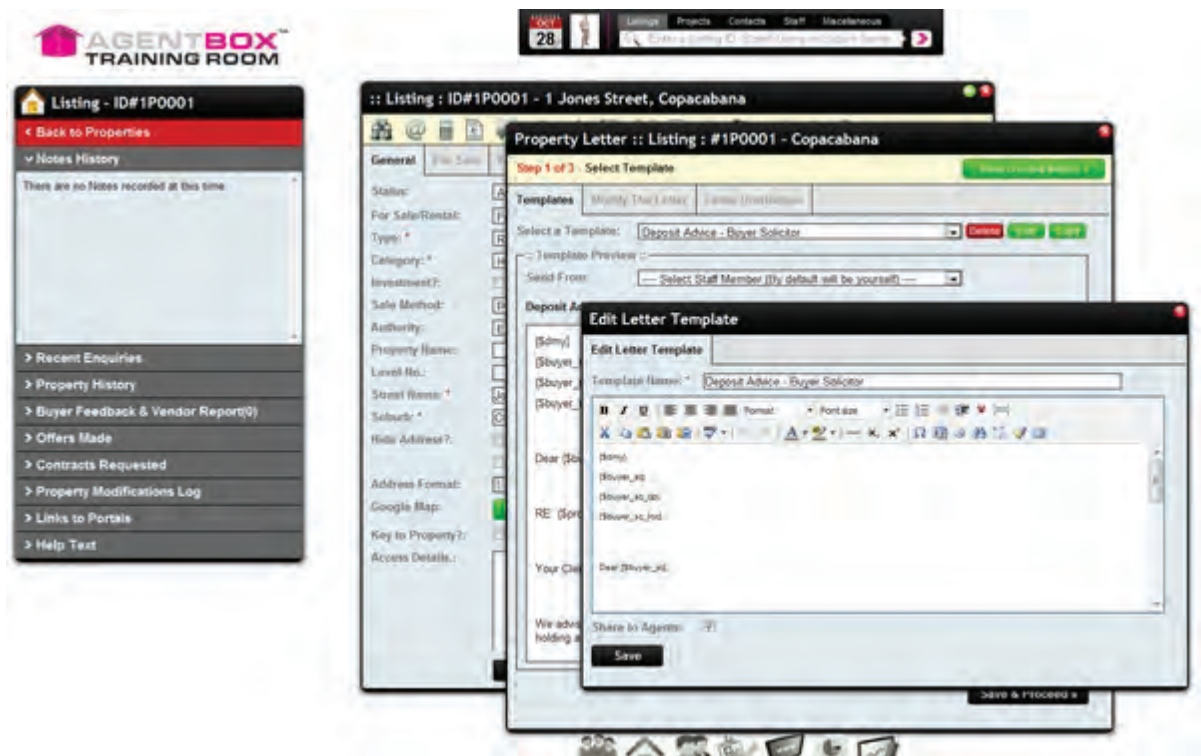
3. You will now be able to click a green Copy button to the right of the Select a Template drop down menu.



4. The Edit Letter Template window will appear which allows you to make alterations to:

- Rename the template
- Add/Edit the text in the template using the formatting tools. (if pasting from Microsoft Word, please use the paste from word tool )
- Add/edit the variables (merge fields) using the red **V** icon.


**Hint - When typing, click shift + enter to proceed to the next line. 'Enter' will make a new paragraph.*

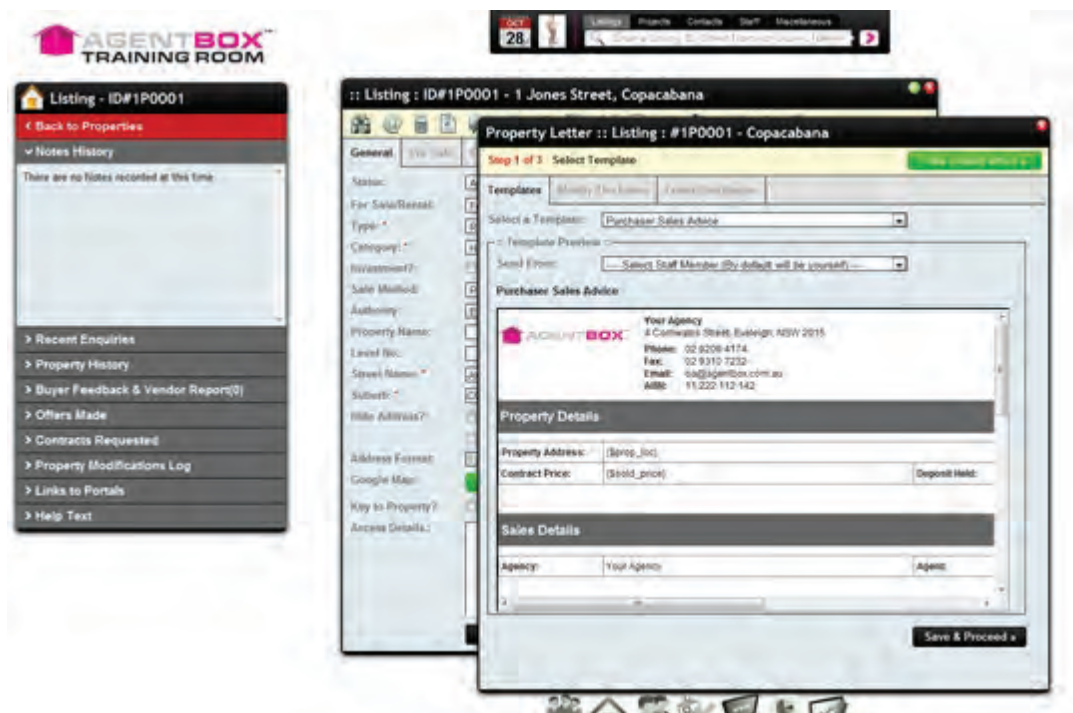


5. Once you have completed your editing, you can select whether or not to share this template with other agents or whether this edited version will be just for you by ticking the Share to Agents checkbox.
6. Lastly hit Save You will be redirected back to the Select Template page and your newly created template can be selected from the drop down list.

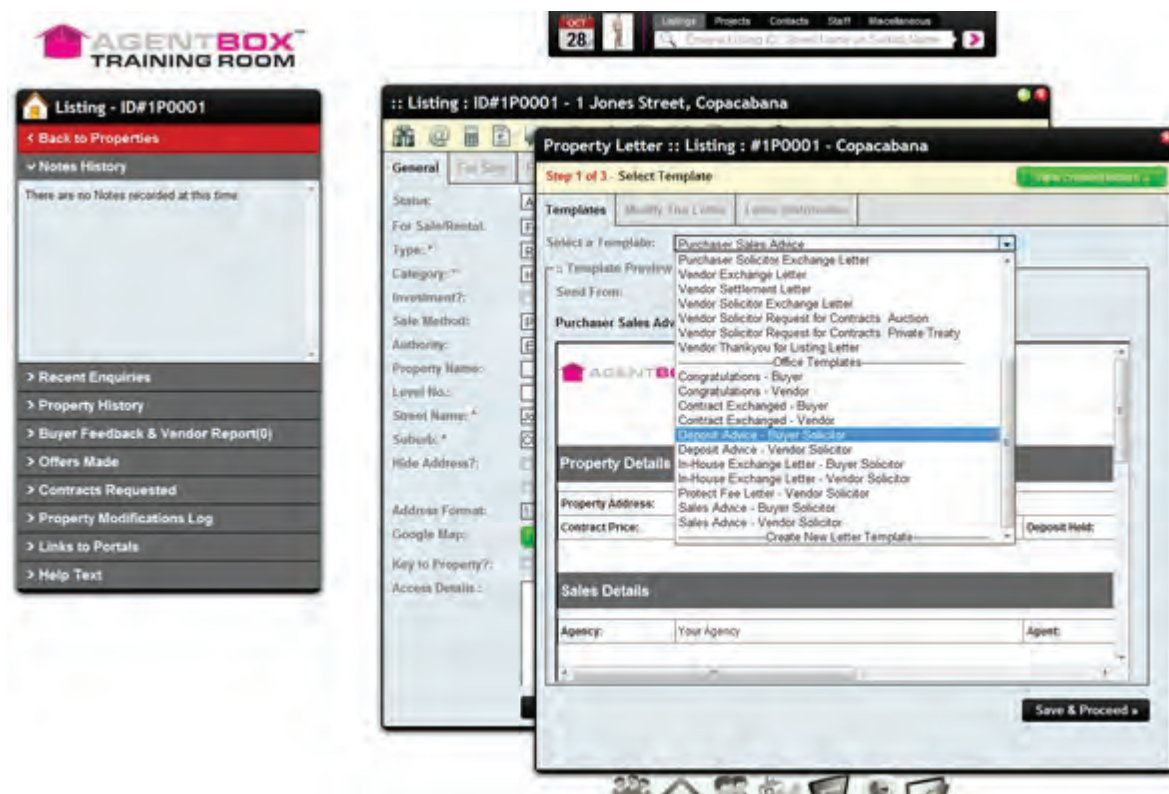
Edit a Letter Template

How do I modify/edit an existing letter template?

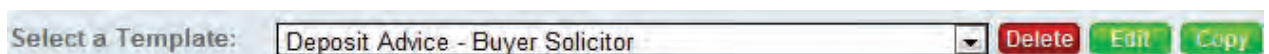
1. Click on the create letter icon  at the top of the contact or property card. The Letter panel will pop-up.

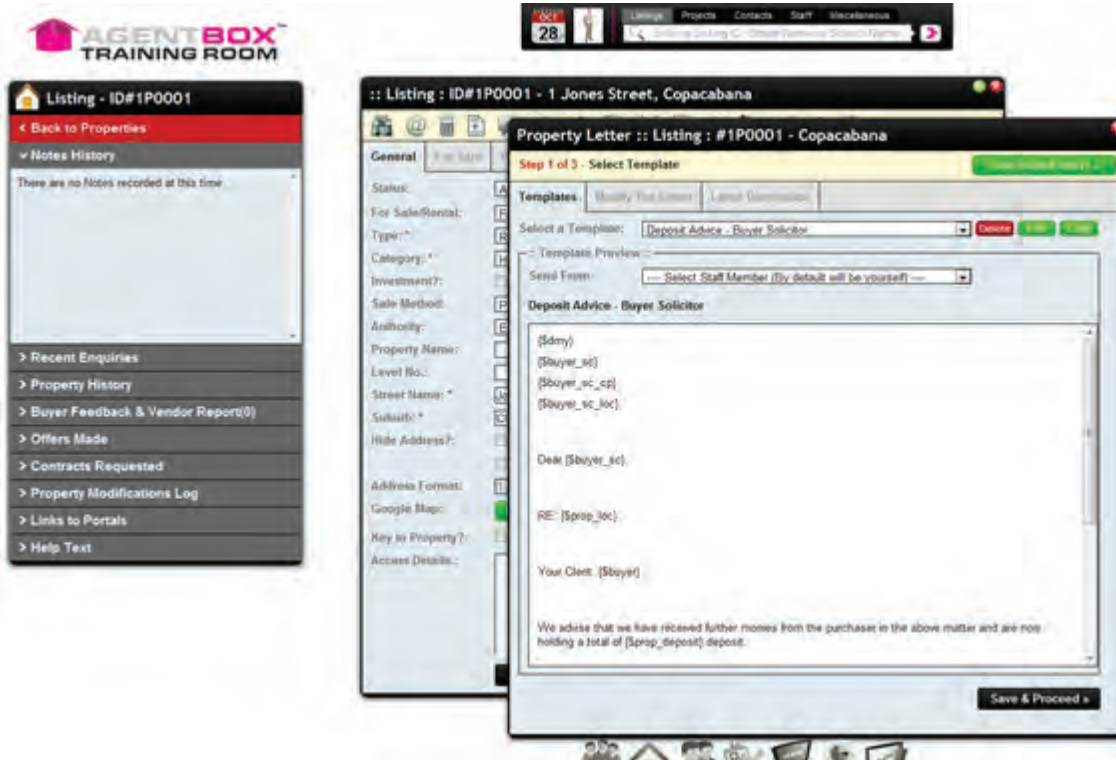



- Click on the Select A Template drop down menu at the top of the panel and choose the template you would like to modify.



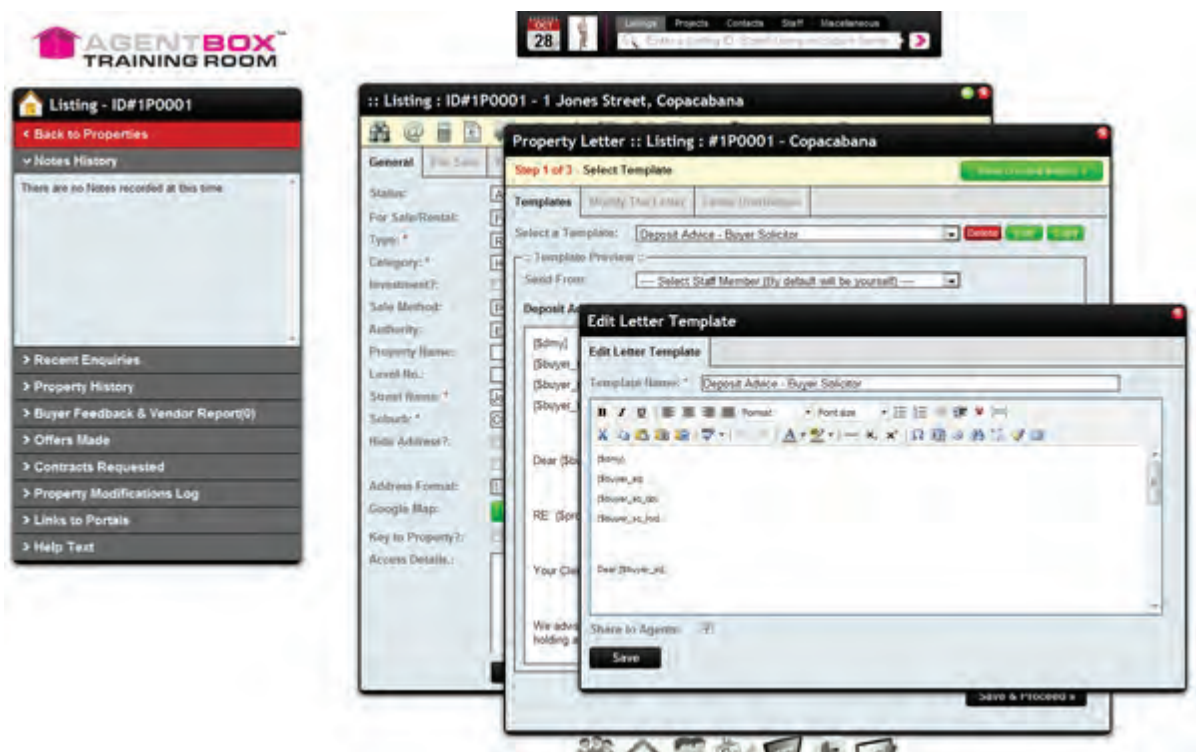
- You will now be able to click a green Edit button to the right of the Select a Template drop down menu.





4. The Edit Letter Template window will appear which allows you to make alterations to:
- Rename the template
 - Add/Edit the text in the template using the formatting tools. (if pasting from Microsoft Word, please use the paste from word tool )
 - Add/edit the variables (merge fields) using the red **V** icon.


**Hint - When typing, click shift + enter to proceed to the next line. 'Enter' will make a new paragraph.*

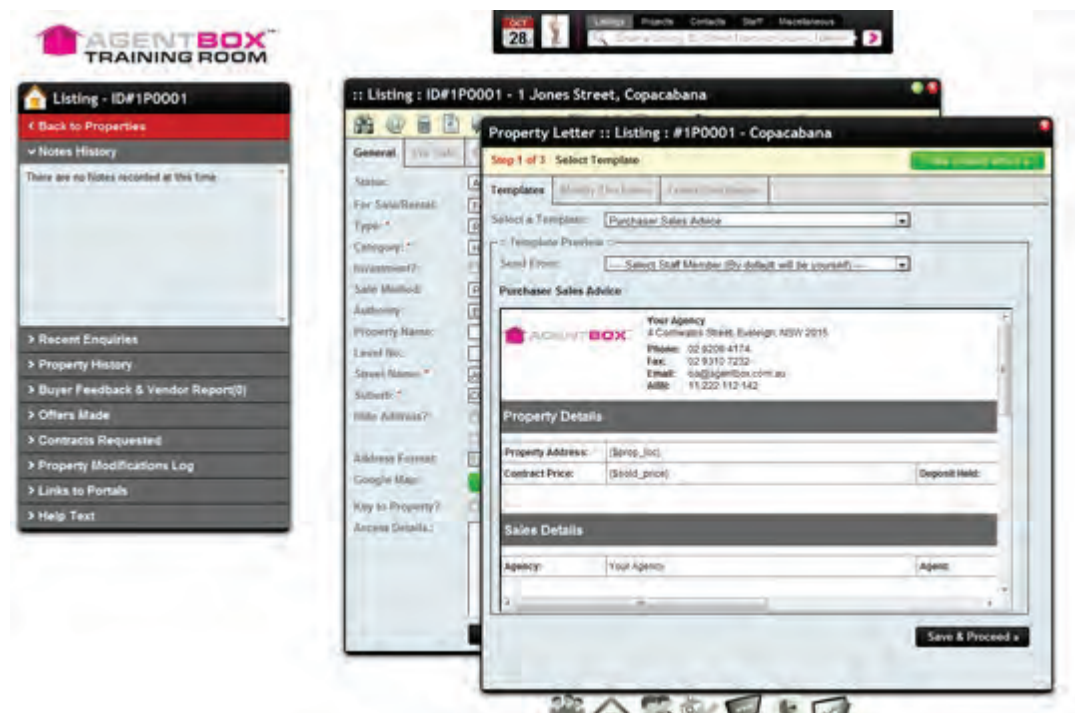


- Once you have completed your editing, you can select whether or not to share this template with other agents or whether this edited version will be just for you by ticking the Share to Agents checkbox.
- Lastly, hit Save. You will be redirected back to the Select Template page and your recently modified template can be selected from the drop down list.

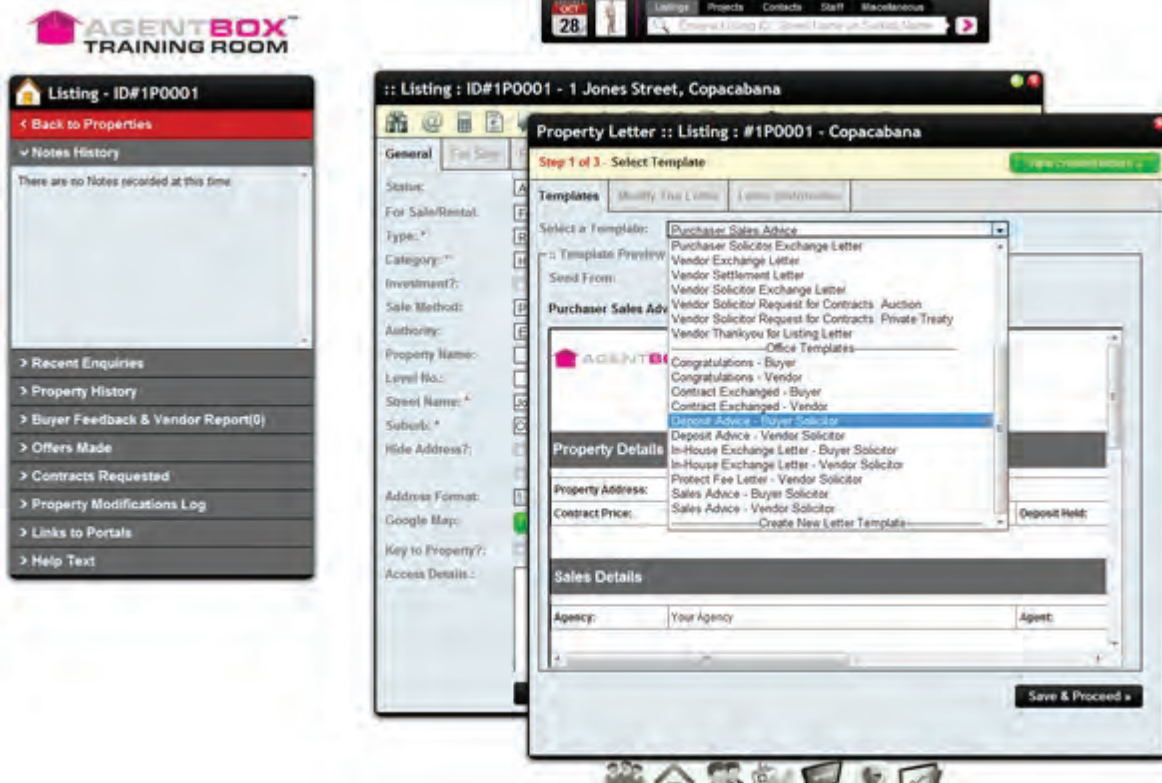
Delete a Letter Template

How do I delete a letter template?

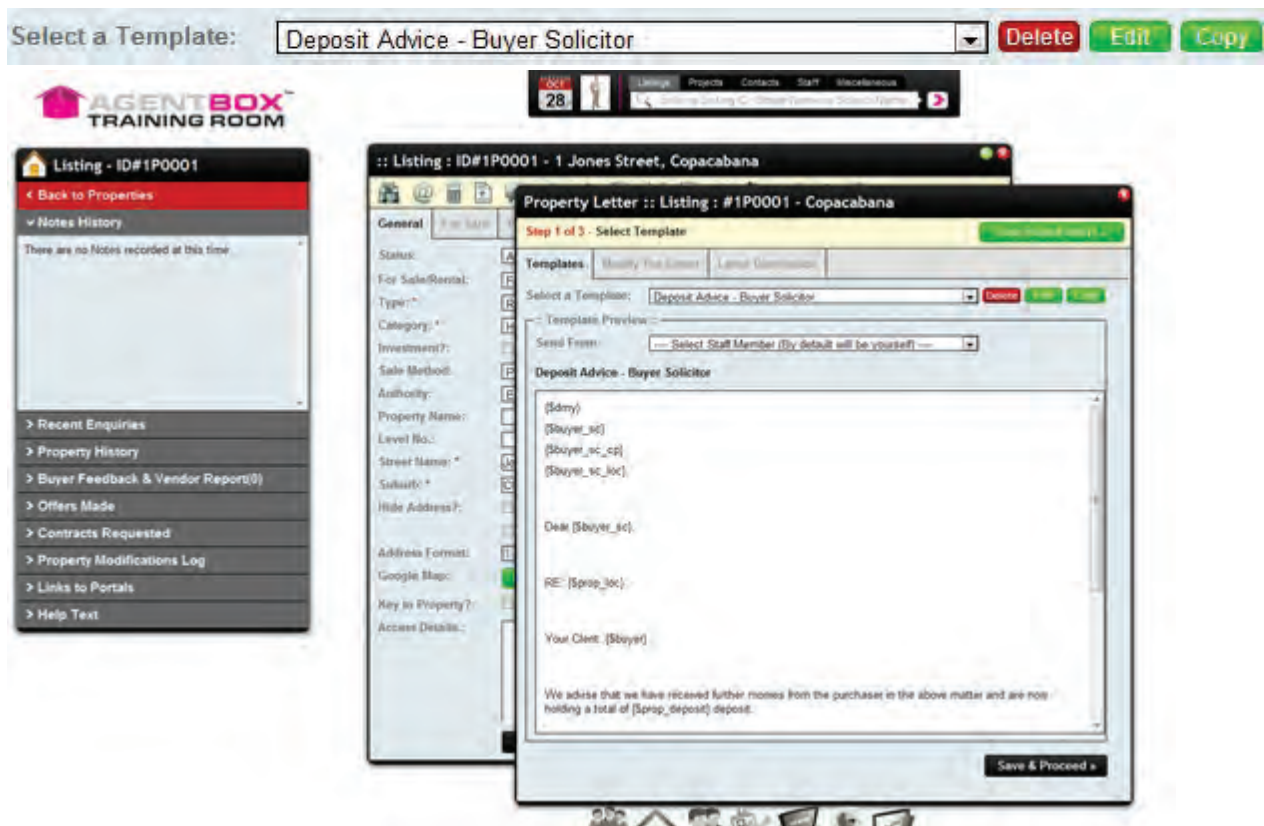
- Click on the create letter icon  at the top of the contact or property card. The Letter panel will pop-up.



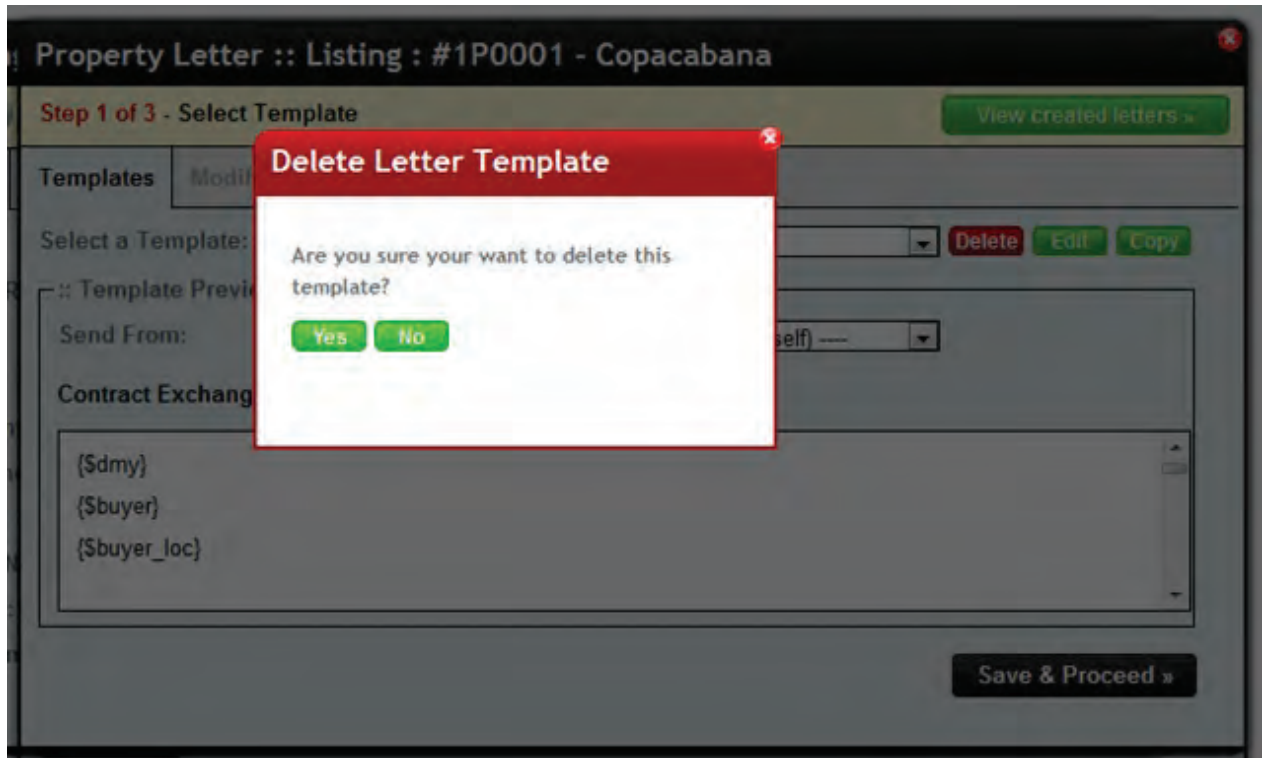
- Click on the Select A Template drop down menu at the top of the panel and choose the template you would like to delete.



3. You will now be able to click a red Delete button to the right of the Select a Template drop down menu.




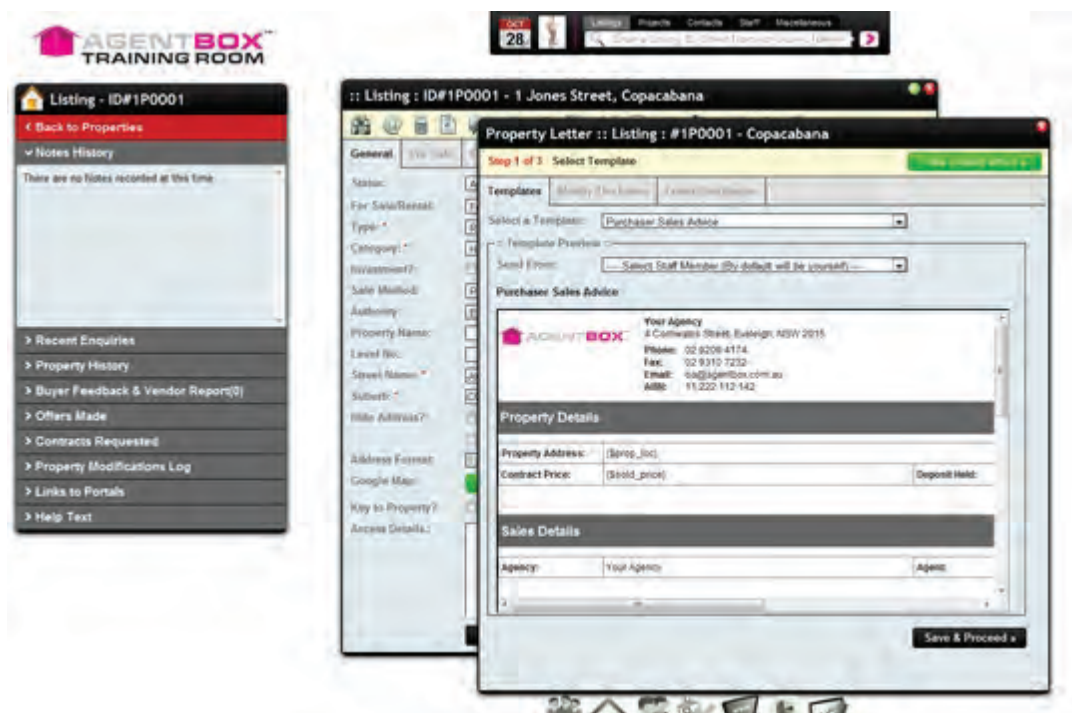
4. You will be prompted to confirm that you would like to delete the template, click Yes to proceed or No to cancel.



Share a Letter Template

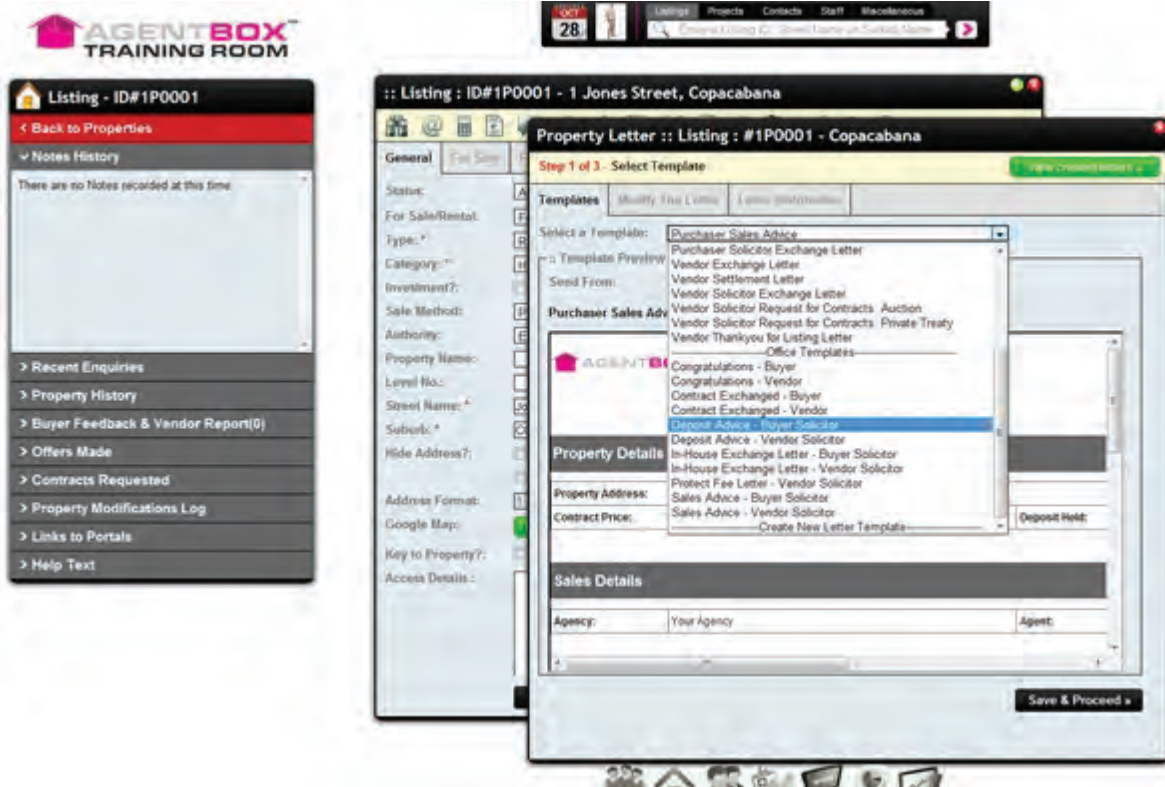
How do I share a letter template to other staff?

1. Click on the create letter icon  at the top of the contact or property card. The Letter panel will pop-up.

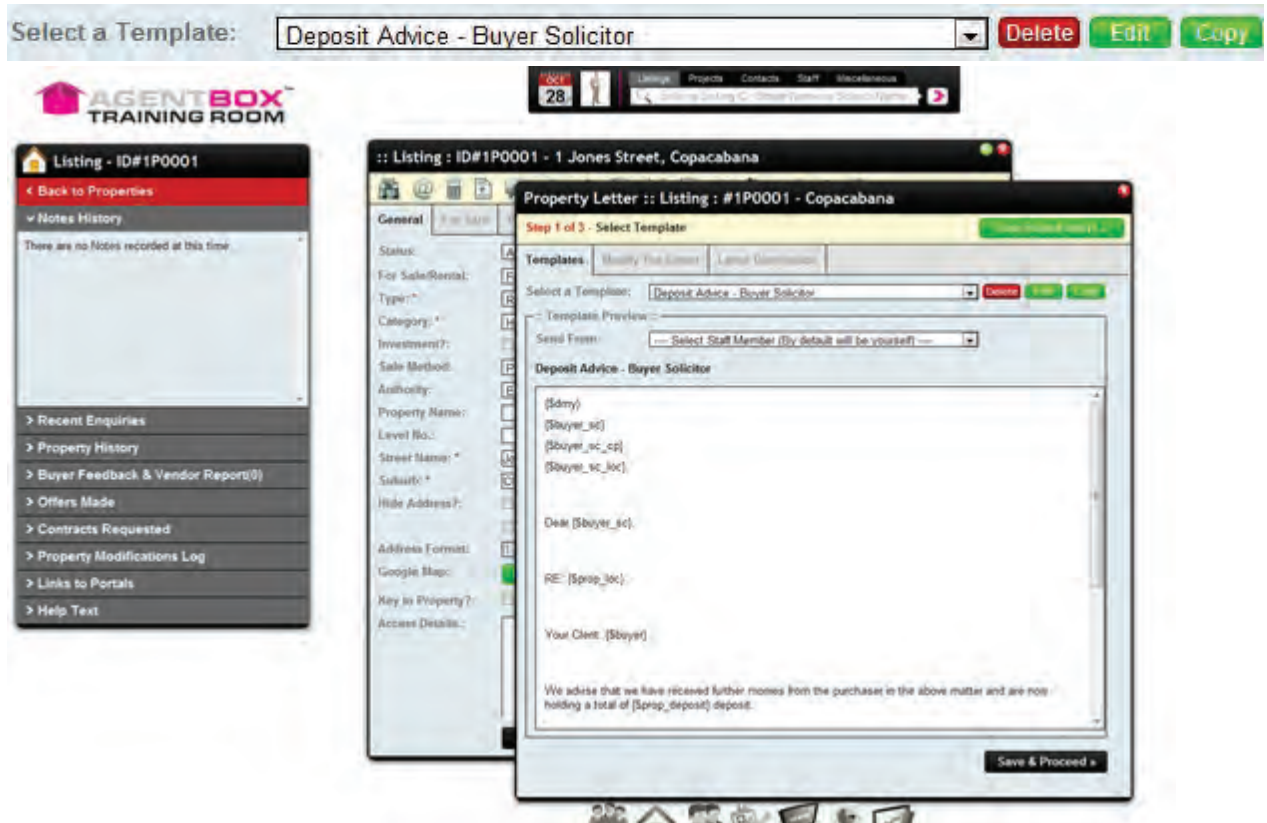


2. Click on the Select A Template drop down menu at the top of the panel and choose the template you

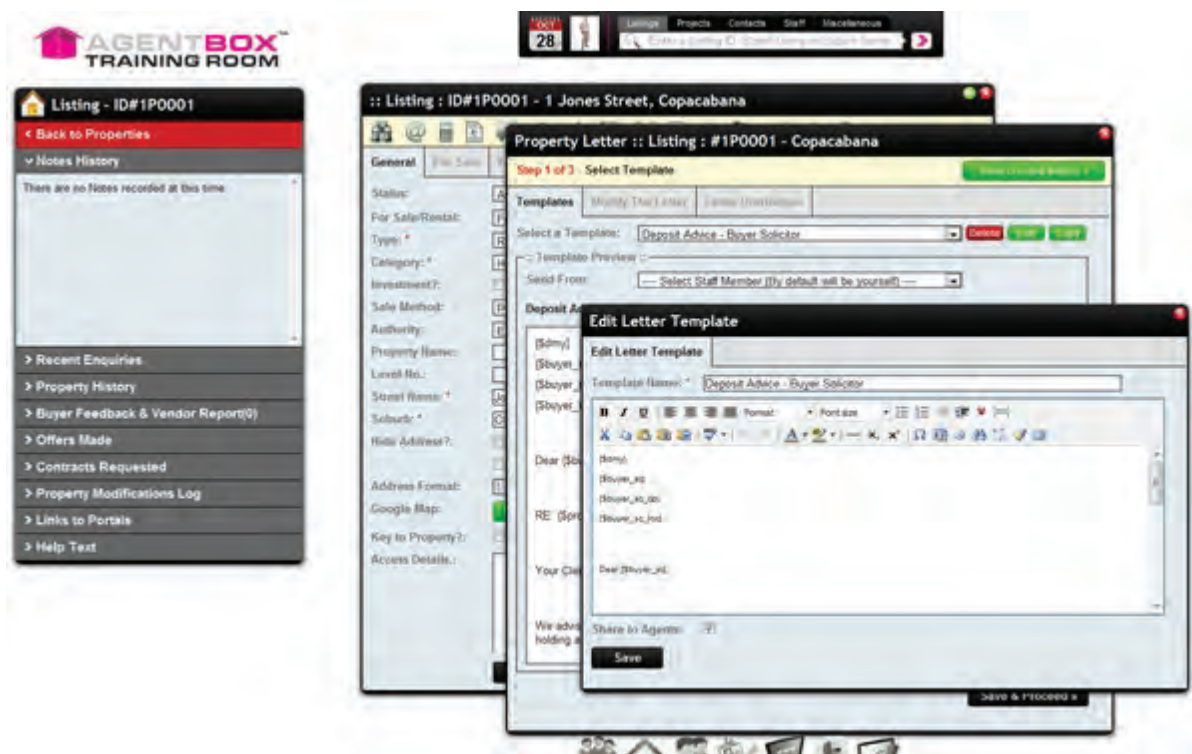
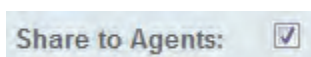
would like to share.



3. You will now be able to click a green Edit button to the right of the Select a Template drop down menu.



- The Edit Letter Template window will appear. By ticking the Share to Agents template all staff will be able to access the template.



- Lastly, click Save. You will be redirected back to the Select Template page and your recently modified template can be selected from the drop down list.

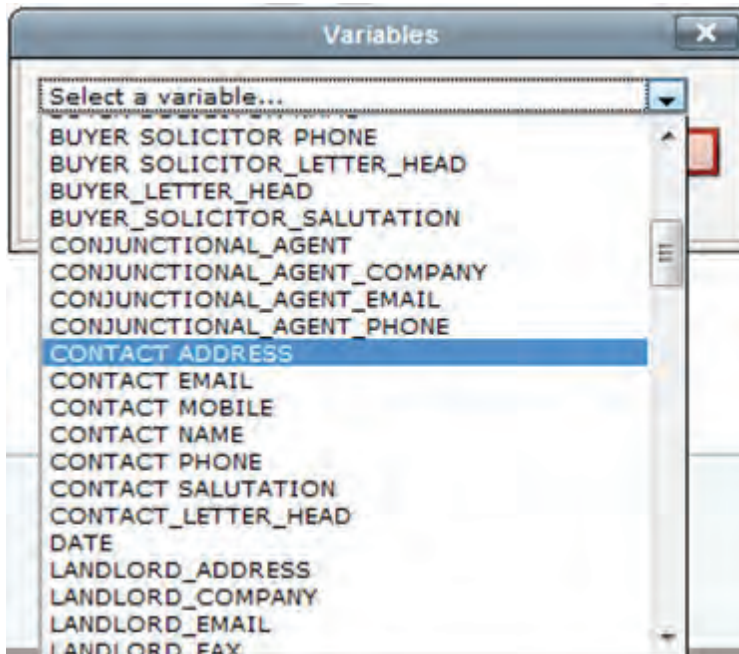
Conduct a Mail Merge to Contacts

How do I conduct a mail merge to a group of contacts?

- You will firstly need to create, copy or edit a letter template
 - [Create a Letter Template](#)
 - [Copy a Letter Template](#)
 - [Edit a Letter Template](#)

Hints

- If the mail merge is going to all Vendor's then the Vendor [Variables](#) must be used and the contact must be ticked as a Vendor (Contact Class).
- If the mail merge is going to all contacts in your database, and they all have different contact classes eg. combination of buyers, vendors, solicitors etc. you can use the Contact [variables](#)

























2. Click on Contacts from the main menu



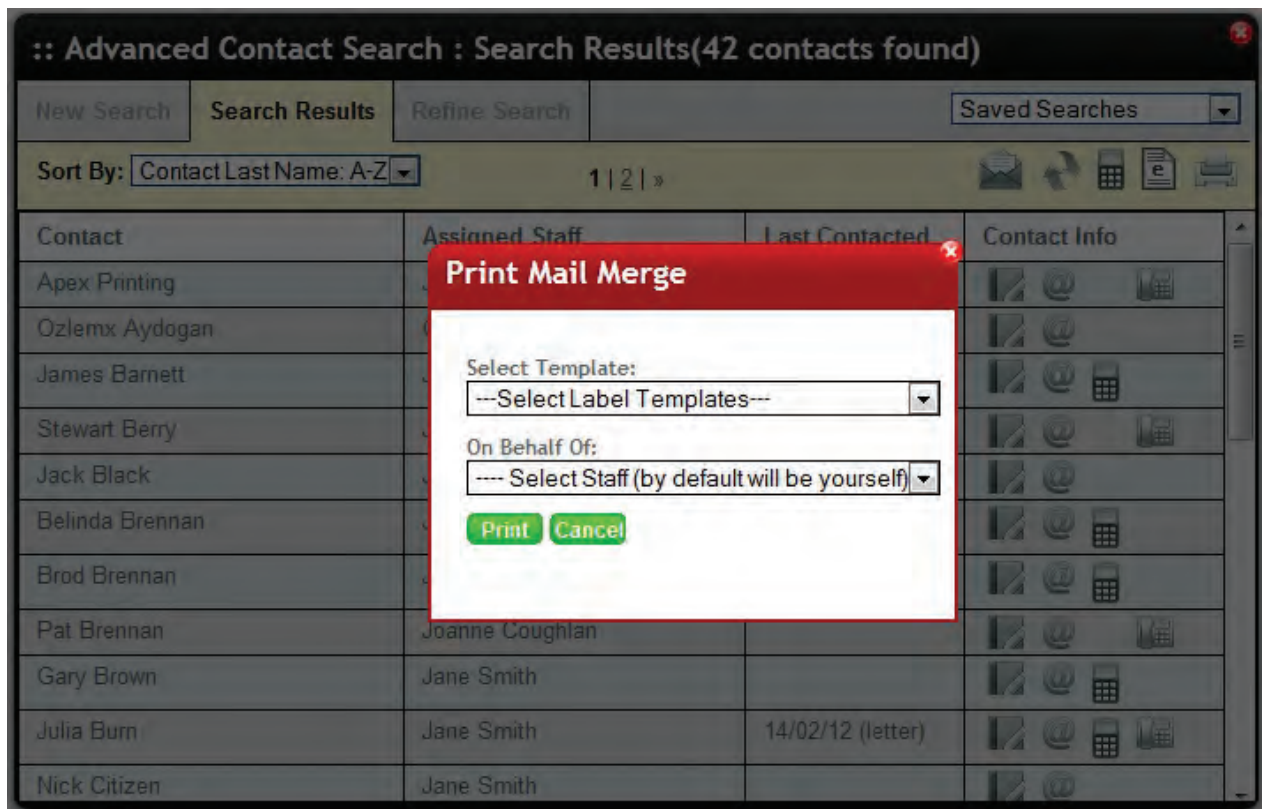
3. Click Advanced Search on the left panel

A screenshot of the 'Contacts' panel. The title 'Contacts' is at the top with a small icon of two people. Below the title is a section titled 'Fast Find'. A yellow box contains the text: 'The system will auto filter your results based on how much info you enter below.' Below this are three input fields: 'First Name:', 'Last Name:', and 'Company:'. Below the input fields is a link that says 'Advanced Search'. At the bottom of the panel is a section titled 'Add a Contact'.

4. Complete an [Advanced Contact Search](#) to generate your list of recipients.
5. Click the letter icon at the top of your search results. 

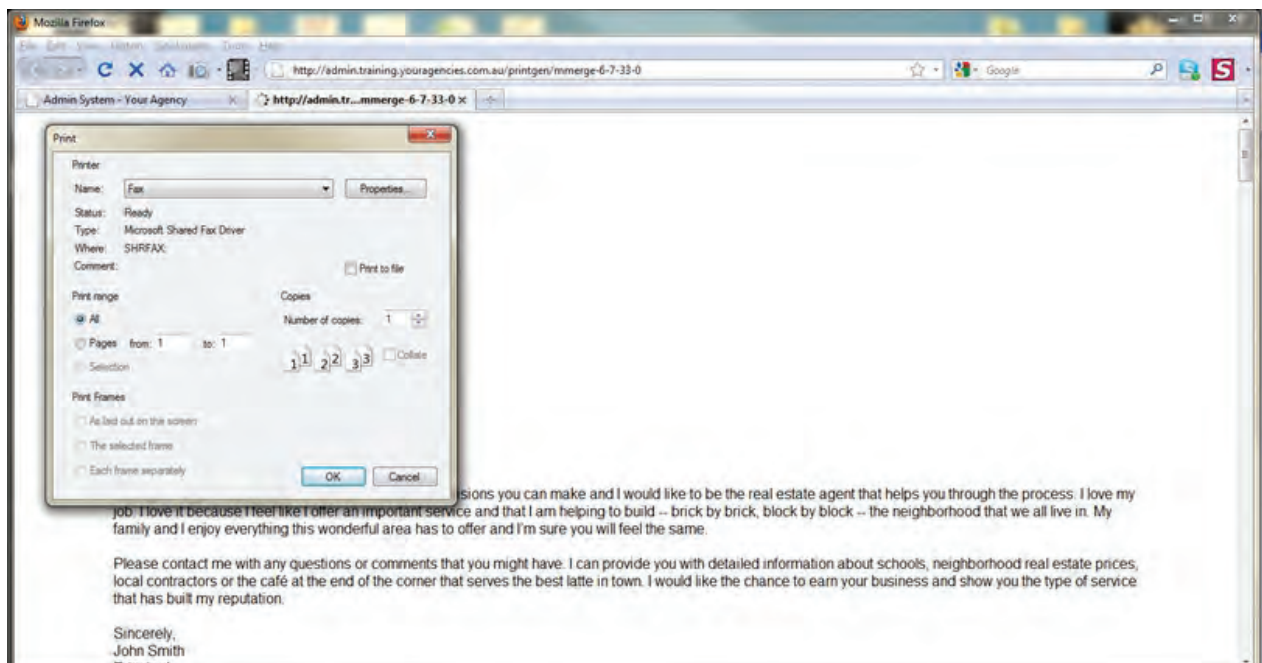
:: Advanced Contact Search : Search Results(9 contacts found)			
New Search	Search Results	Refine Search	
Sort By: Contact Name: A-Z		    	
Contact	Assigned Staff	Last Contacted	Contact Info
Jack Black	John Smith		@ 
Andrew Brown	John Smith		@  
Michael Jones	John Smith		@  
Sam Jones	John Smith		@  
Samantha Jones	John Smith		@  
Mary May	John Smith	19/08/11	@  
Jane Smith	John Smith		 
Agentbox Support	John Smith		@ 
Thomas Train	John Smith	26/10/11	@  

6. Select your template created in step 1 from the Select Template dropdown menu.
7. Select which staff member you will be sending the mail merge from.
8. Click the green Print button.



9. Your mail merge will open in a new browser tab or window.

**Note: To print one letter per page without any page number or URL bars you will need to set up your [print settings](#)*



Conduct a Mail Merge to Properties

How do I conduct a mail merge to a group of properties?

1. You will firstly need to create, copy or edit a letter template

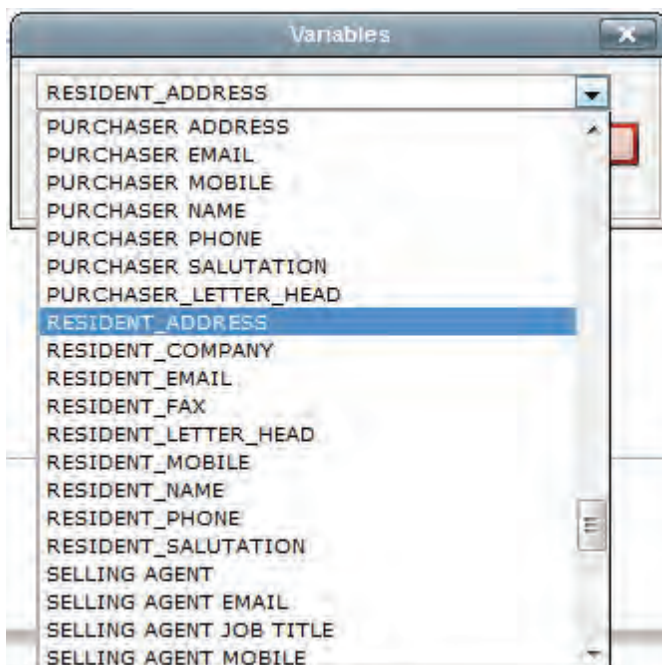
- [Create a Letter Template](#)
- [Copy a Letter Template](#)
- [Edit a Letter Template](#)

Hints

To successfully conduct a mail merge you must select a letter template that contains property letter variables to correctly populate relevant property and contact details. For example if the mail merge is to be sent to the owner attached to each property, the owner variable must be used. An owner must also be assigned to each property.

For prospecting purposes, the use of the Property Mail Address and Resident variables are recommended as the Property Mail Address variable will populate the property address in a mailing format and the resident name or salutation variables will populate the name and salutation respectively, of the attached tenant, owner or owner occupier. If neither of these are assigned to the property the variable will display as RESIDENT.

- Use the 'Resident' or Related Contact role (e.g. 'Purchaser') Letter [Variables](#)
- The letter [Variable](#) for the property address is {\$prop_mail_address} which returns the property address in a mailing format.
- To ensure the letter is addressed to the appropriate person there have been rules applied to the following Resident [Variables](#)
 - {\$resident} - Will insert the Title, First Name and Last Name of the attached tenant (if one exists), else an attached owner/owner occupier (if one exists), if neither of these are assigned to the property the variable will display as RESIDENT.
 - {\$resident_dear} - Will insert the Salutation of the attached tenant (if one exists), else an attached owner/owner occupier (if one exists), if neither of these are assigned to the property the variable will display as RESIDENT.



2. Click on the Property icon from the main menu



3. Click on Advanced Search from [Left Panel](#)

Properties

Available | Inspections | Off Market

Enter a keyword or fill in property options below. Your search will auto filter your property results.

Address: No. Enter Street, Suburb or ID

For: Sale Type: Residential


Features:

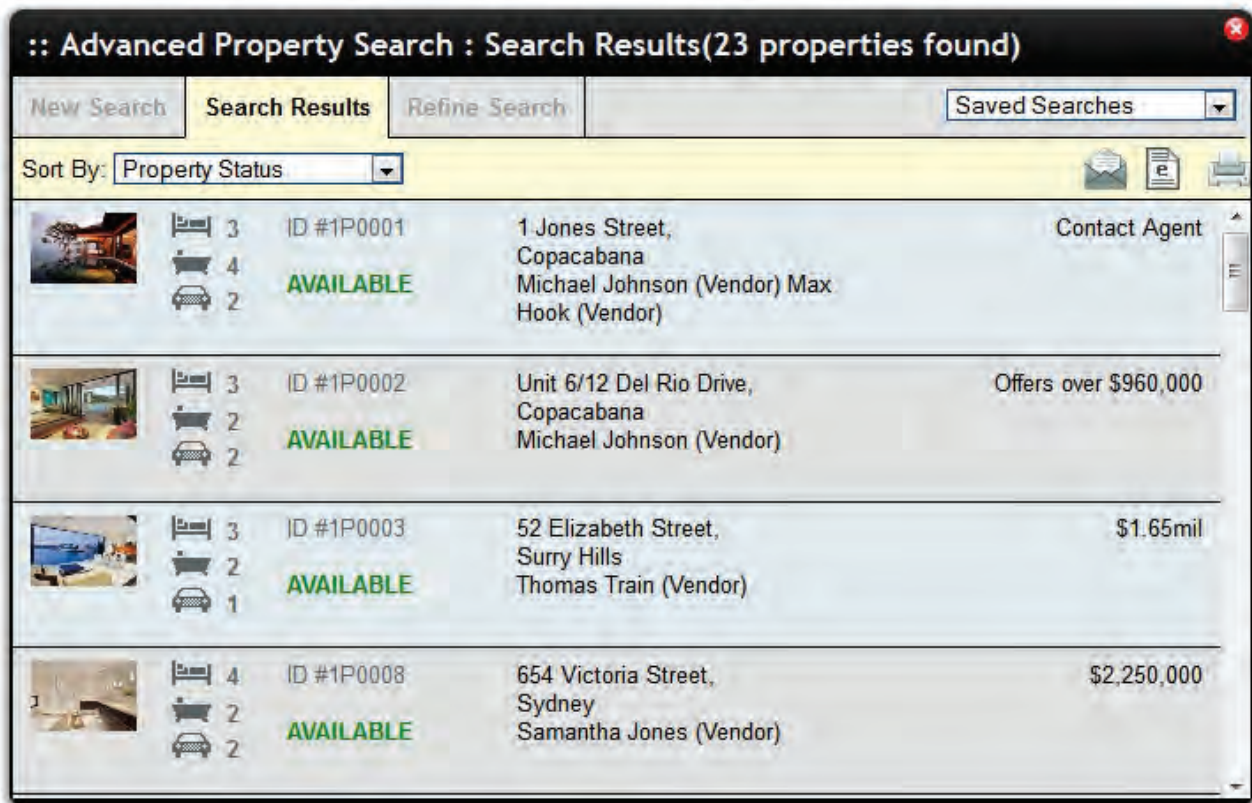
From \$: To \$:

Order: By Suburb

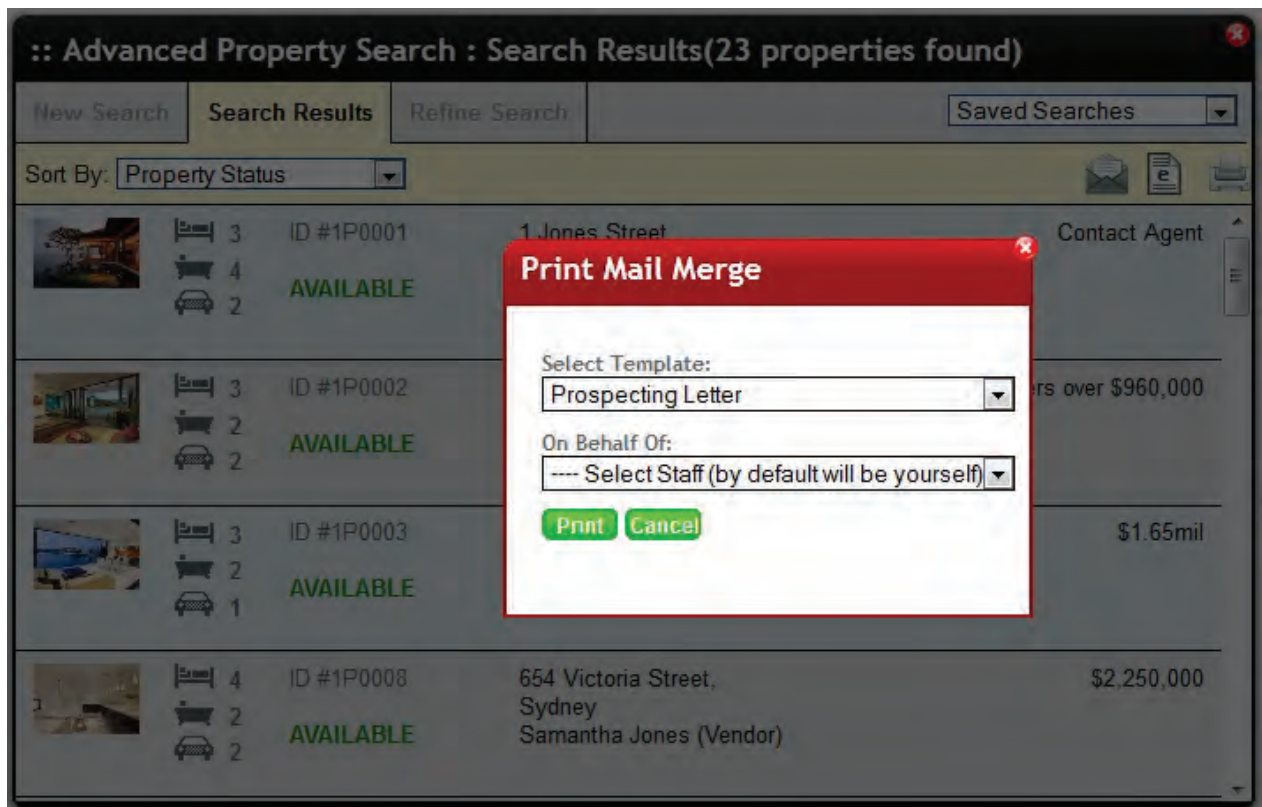
Search [Advanced Search](#)

- Add a Property
- Add a Project / Development
- Add an Appraisal / Prospect Property

4. Complete an [Advanced Property Search](#) to generate your list of recipients.
5. Click the letter icon at the top of your search results. 

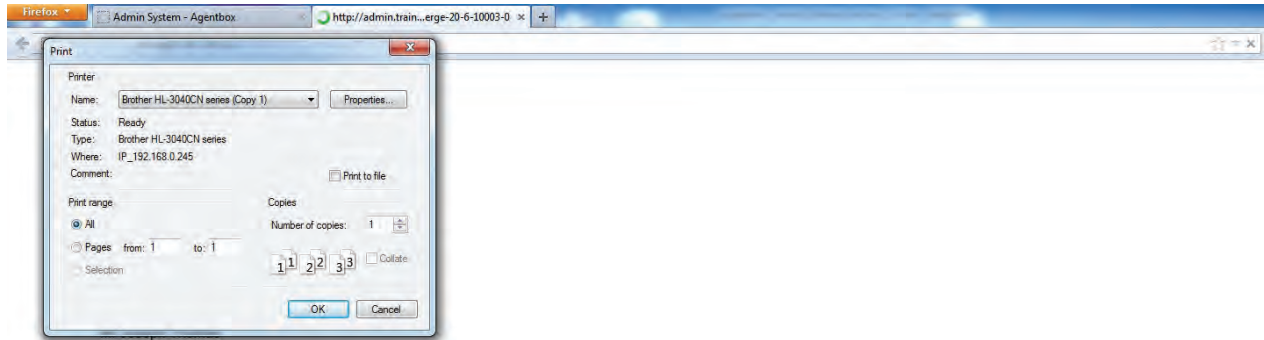


6. Select your template created in step 1 from the Select Template drop down menu.
7. Select which staff member you will be sending the mail merge from.
8. Click the green Print button.



1. Your mail merge will open in a new browser tab or window.

**Note: To print one letter per page without any page number or URL bars you will need to set up your [print settings](#)*



Dear Joe

An auction is taking place in your area at 18 Matthew Street, Sydney. The auction result may provide you with up to date information as property values in your area.

You will be contacted over the next few days to see if you are interested in attending the auction or would like to receive some information about the auction or property market.

I look forward to meeting you over the next few days.


Yours faithfully,

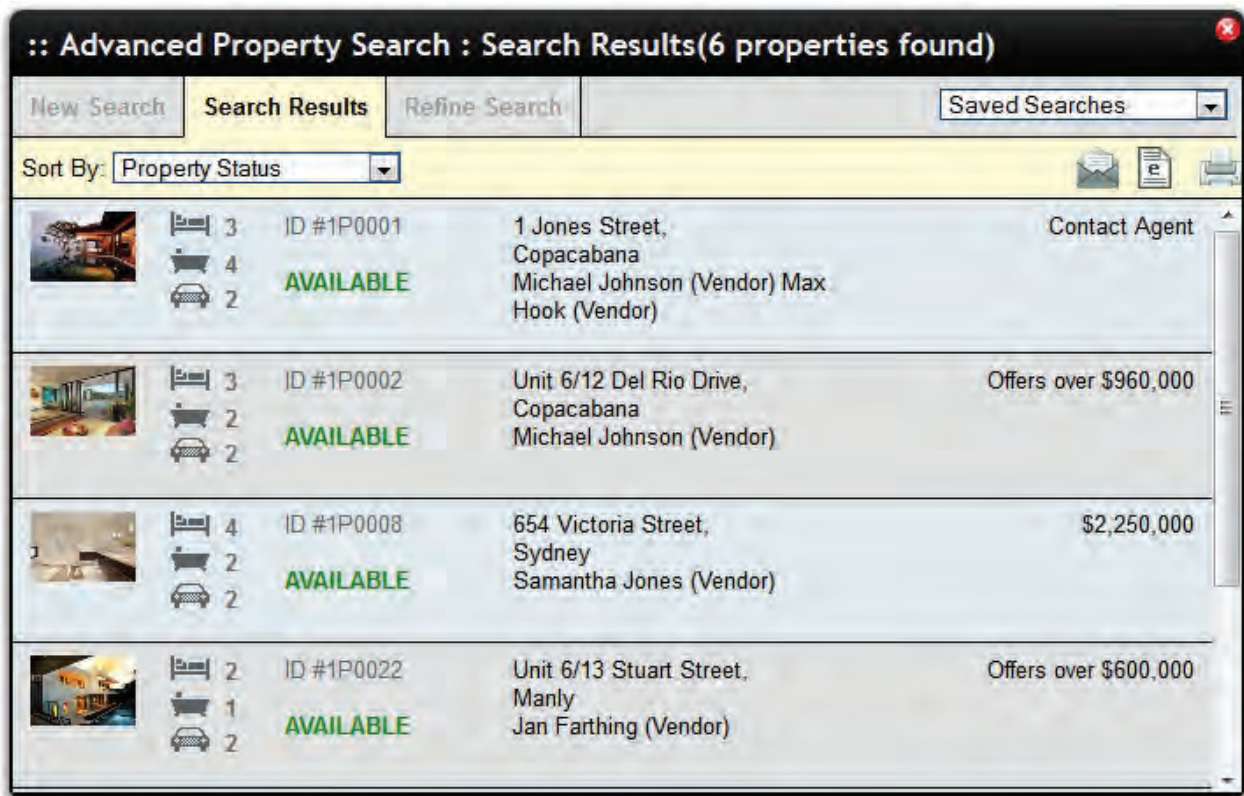
Jane Smith
Principal
Agentbox

Avery Mailing Label Printing

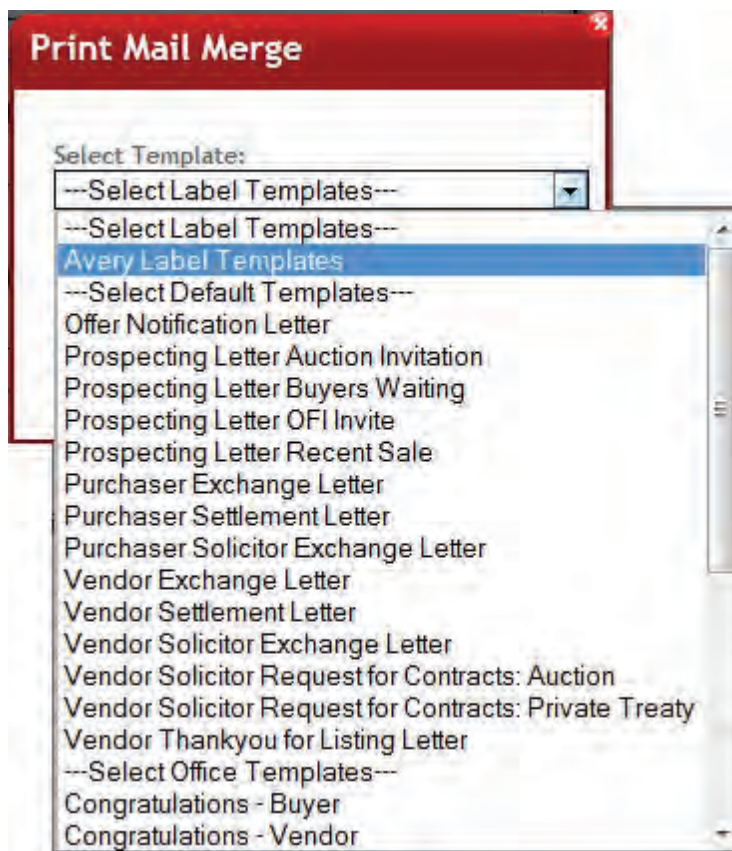
How do I print Mailing Labels?

**Note: Our mailing label templates are compatible with Avery Labels L7159, L7160, L7161, L7162, L7163.*

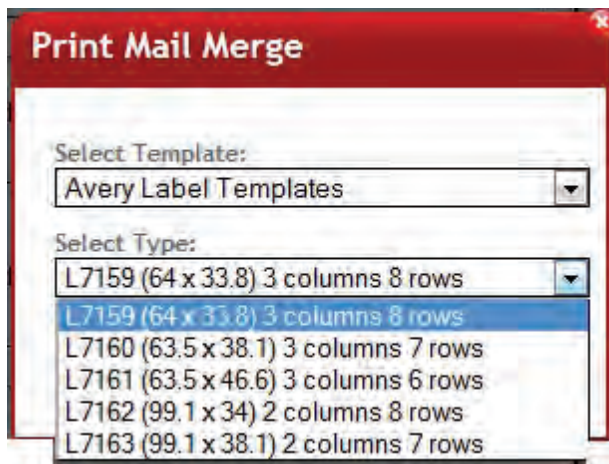
1. You can print labels to a group of contacts or group of properties by completing either an [advanced contact search](#), [advanced property search](#) or opening any target list e.g. Inspection [Viewers](#) of a property etc
2. Click on the Print Mail Merge icon  at the top of the target list.



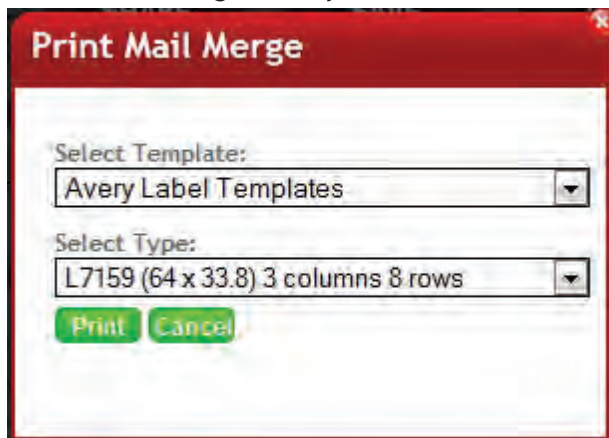
3. Select Avery Label Templates from the Select Template drop down.



4. A new drop down menu will appear, select a label template



5. Click Print to generate your labels as a PDF document

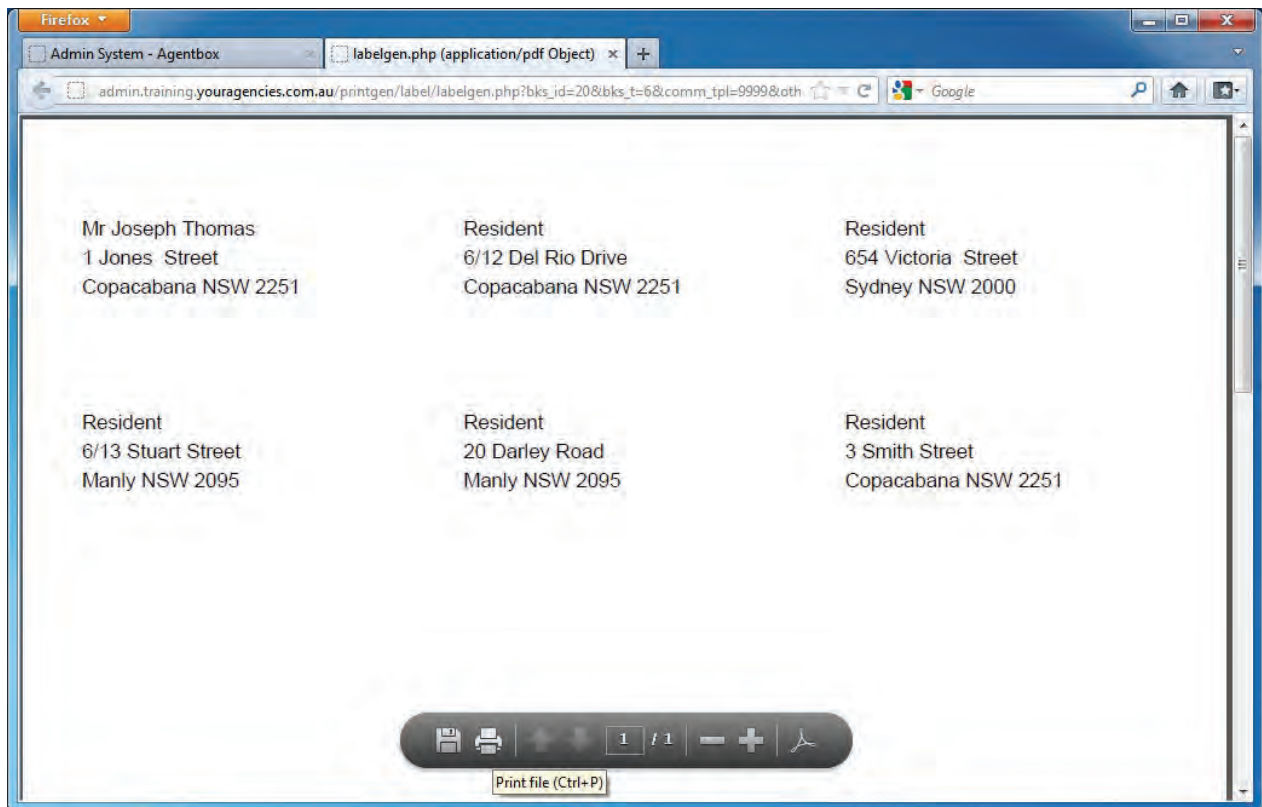


6. Insert labels into your printer and click Print

**Please note, if sending to;*

- a group of properties the labels will insert the Title, First Name and Last Name of the attached tenant (if one exists), else an attached owner/owner occupier (if one exists), If neither of these are assigned to the property the variable will display as RESIDENT.

- a group of contacts the labels will insert the Letter head which by default will Address the Custom Letter head entered (if one exists), else Title, First Name, Last Name, Company Name and postal address (if one exists), else Title, First Name, Last Name, Company Name and residential address .



Variables

What are the available variables/merge fields for letter templates?

Variable	Name	Notes
GENERAL VARIABLES		
{\$dmy}	30th April 2012	current date when producing the letter
CONTACT VARIABLES		
{\$buyer}	#BUYER#	
{\$buyer_fn}	#BUYER_FIRSTNAME#	
{\$buyer_sn}	#BUYER_SURNAME#	
{\$buyer_cp}	#BUYER_COMPANY#	
{\$buyer_dear}	#BUYER_SALUTATION#	
{\$buyer_ph}	#BUYER_PHONE#	
{\$buyer_mo}	#BUYER_MOBILE#	
{\$buyer_em}	#BUYER_EMAIL#	
{\$buyer_lh}	#BUYER_LETTER_HEAD#	
{\$buyer_loc}	#BUYER_ADDRESS#	
{\$buyer_fx}	#BUYER_FAX#	
{\$vendor}	#VENDOR#	
{\$vendor_fn}	#VENDOR_FIRSTNAME#	
{\$vendor_sn}	#VENDOR_SURNAME#	
{\$vendor_cp}	#VENDOR_COMPANY#	
{\$vendor_dear}	#VENDOR_SALUTATION#	
{\$vendor_ph}	#VENDOR_PHONE#	
{\$vendor_mo}	#VENDOR_MOBILE#	
{\$vendor_em}	#VENDOR_EMAIL#	

{ \$vendor_lh }	#VENDOR_LETTER_HEAD#	
{ \$vendor_loc }	#VENDOR_ADDRESS#	
{ \$vendor_fx }	#VENDOR_FAX#	
{ \$solicitor }	#SOLICITOR#	
{ \$solicitor_fn }	#SOLICITOR_FIRSTNAME#	
{ \$solicitor_sn }	#SOLICITOR_SURNAME#	
{ \$solicitor_cp }	#SOLICITOR_COMPANY#	
{ \$solicitor_dear }	#SOLICITOR_SALUTATION#	
{ \$solicitor_ph }	#SOLICITOR_PHONE#	
{ \$solicitor_mo }	#SOLICITOR_MOBILE#	
{ \$solicitor_em }	#SOLICITOR_EMAIL#	
{ \$solicitor_lh }	#SOLICITOR_LETTER_HEAD#	
{ \$solicitor_loc }	#SOLICITOR_ADDRESS#	
{ \$solicitor_fx }	#SOLICITOR_FAX#	
{ \$developer }	#DEVELOPER#	
{ \$developer_fn }	#DEVELOPER_FIRSTNAME#	
{ \$developer_sn }	#DEVELOPER_SURNAME#	
{ \$developer_cp }	#DEVELOPER_COMPANY#	
{ \$developer_dear }	#DEVELOPER_SALUTATION#	
{ \$developer_ph }	#DEVELOPER_PHONE#	
{ \$developer_mo }	#DEVELOPER_MOBILE#	
{ \$developer_em }	#DEVELOPER_EMAIL#	
{ \$developer_lh }	#DEVELOPER_LETTER_HEAD#	
{ \$developer_loc }	#DEVELOPER_ADDRESS#	
{ \$developer_fx }	#DEVELOPER_FAX#	
{ \$accountant }	#ACCOUNTANT#	
{ \$accountant_fn }	#ACCOUNTANT_FIRSTNAME#	
{ \$accountant_sn }	#ACCOUNTANT_SURNAME#	
{ \$accountant_cp }	#ACCOUNTANT_COMPANY#	
{ \$accountant_dear }	#ACCOUNTANT_SALUTATION#	
{ \$accountant_ph }	#ACCOUNTANT_PHONE#	
{ \$accountant_mo }	#ACCOUNTANT_MOBILE#	
{ \$accountant_em }	#ACCOUNTANT_EMAIL#	
{ \$accountant_lh }	#ACCOUNTANT_LETTER_HEAD#	
{ \$accountant_loc }	#ACCOUNTANT_ADDRESS#	
{ \$accountant_fx }	#ACCOUNTANT_FAX#	
{ \$tenant }	#TENANT#	
{ \$tenant_fn }	#TENANT_FIRSTNAME#	
{ \$tenant_sn }	#TENANT_SURNAME#	
{ \$tenant_cp }	#TENANT_COMPANY#	
{ \$tenant_dear }	#TENANT_SALUTATION#	
{ \$tenant_ph }	#TENANT_PHONE#	
{ \$tenant_mo }	#TENANT_MOBILE#	
{ \$tenant_em }	#TENANT_EMAIL#	
{ \$tenant_lh }	#TENANT_LETTER_HEAD#	
{ \$tenant_loc }	#TENANT_ADDRESS#	
{ \$tenant_fx }	#TENANT_FAX#	
{ \$landlord }	#LANDLORD#	

{\$landlord_fn}	#LANDLORD_FIRSTNAME#	
{\$landlord_sn}	#LANDLORD_SURNAME#	
{\$landlord_cp}	#LANDLORD_COMPANY#	
{\$landlord_dear}	#LANDLORD_SALUTATION#	
{\$landlord_ph}	#LANDLORD_PHONE#	
{\$landlord_mo}	#LANDLORD_MOBILE#	
{\$landlord_em}	#LANDLORD_EMAIL#	
{\$landlord_lh}	#LANDLORD_LETTER_HEAD#	
{\$landlord_loc}	#LANDLORD_ADDRESS#	
{\$landlord_fx}	#LANDLORD_FAX#	
{\$investor}	#INVESTOR#	
{\$investor_fn}	#INVESTOR_FIRSTNAME#	
{\$investor_sn}	#INVESTOR_SURNAME#	
{\$investor_cp}	#INVESTOR_COMPANY#	
{\$investor_dear}	#INVESTOR_SALUTATION#	
{\$investor_ph}	#INVESTOR_PHONE#	
{\$investor_mo}	#INVESTOR_MOBILE#	
{\$investor_em}	#INVESTOR_EMAIL#	
{\$investor_lh}	#INVESTOR_LETTER_HEAD#	
{\$investor_loc}	#INVESTOR_ADDRESS#	
{\$investor_fx}	#INVESTOR_FAX#	
{\$owner_occupied}	#OWNER_OCCUPIED#	
{\$owner_occupied_fn}	#OWNER_OCCUPIED_FIRSTNAME#	
{\$owner_occupied_sn}	#OWNER_OCCUPIED_SURNAME#	
{\$owner_occupied_cp}	#OWNER_OCCUPIED_COMPANY#	
{\$owner_occupied_dear}	#OWNER_OCCUPIED_SALUTATION#	
{\$owner_occupied_ph}	#OWNER_OCCUPIED_PHONE#	
{\$owner_occupied_mo}	#OWNER_OCCUPIED_MOBILE#	
{\$owner_occupied_em}	#OWNER_OCCUPIED_EMAIL#	
{\$owner_occupied_lh}	#OWNER_OCCUPIED_LETTER_HEAD#	
{\$owner_occupied_loc}	#OWNER_OCCUPIED_ADDRESS#	
{\$owner_occupied_fx}	#OWNER_OCCUPIED_FAX#	
{\$referrer}	#REFERRER#	
{\$referrer_fn}	#REFERRER_FIRSTNAME#	
{\$referrer_sn}	#REFERRER_SURNAME#	
{\$referrer_cp}	#REFERRER_COMPANY#	
{\$referrer_dear}	#REFERRER_SALUTATION#	
{\$referrer_ph}	#REFERRER_PHONE#	
{\$referrer_mo}	#REFERRER_MOBILE#	
{\$referrer_em}	#REFERRER_EMAIL#	
{\$referrer_lh}	#REFERRER_LETTER_HEAD#	
{\$referrer_loc}	#REFERRER_ADDRESS#	
{\$referrer_fx}	#REFERRER_FAX#	
{\$tradesperson}	#TRADESPERSON#	
{\$tradesperson_fn}	#TRADESPERSON_FIRSTNAME#	
{\$tradesperson_sn}	#TRADESPERSON_SURNAME#	
{\$tradesperson_cp}	#TRADESPERSON_COMPANY#	
{\$tradesperson_dear}	#TRADESPERSON_SALUTATION#	

{\$tradesperson_ph}	#TRADESPERSON_PHONE#	
{\$tradesperson_mo}	#TRADESPERSON_MOBILE#	
{\$tradesperson_em}	#TRADESPERSON_EMAIL#	
{\$tradesperson_lh}	#TRADESPERSON_LETTER_HEAD#	
{\$tradesperson_loc}	#TRADESPERSON_ADDRESS#	
{\$tradesperson_fx}	#TRADESPERSON_FAX#	
{\$supplier}	#SUPPLIER#	
{\$supplier_fn}	#SUPPLIER_FIRSTNAME#	
{\$supplier_sn}	#SUPPLIER_SURNAME#	
{\$supplier_cp}	#SUPPLIER_COMPANY#	
{\$supplier_dear}	#SUPPLIER_SALUTATION#	
{\$supplier_ph}	#SUPPLIER_PHONE#	
{\$supplier_mo}	#SUPPLIER_MOBILE#	
{\$supplier_em}	#SUPPLIER_EMAIL#	
{\$supplier_lh}	#SUPPLIER_LETTER_HEAD#	
{\$supplier_loc}	#SUPPLIER_ADDRESS#	
{\$supplier_fx}	#SUPPLIER_FAX#	
{\$conjunctional_agent}	#CONJUNCTIONAL_AGENT#	
{\$conjunctional_agent_fn}	#CONJUNCTIONAL_AGENT_FIRSTNAME#	
{\$conjunctional_agent_sn}	#CONJUNCTIONAL_AGENT_SURNAME#	
{\$conjunctional_agent_cp}	#CONJUNCTIONAL_AGENT_COMPANY#	
{\$conjunctional_agent_dear}	#CONJUNCTIONAL_AGENT_SALUTATION#	
{\$conjunctional_agent_ph}	#CONJUNCTIONAL_AGENT_PHONE#	
{\$conjunctional_agent_mo}	#CONJUNCTIONAL_AGENT_MOBILE#	
{\$conjunctional_agent_em}	#CONJUNCTIONAL_AGENT_EMAIL#	
{\$conjunctional_agent_lh}	#CONJUNCTIONAL_AGENT_LETTER_HEAD#	
{\$conjunctional_agent_loc}	#CONJUNCTIONAL_AGENT_ADDRESS#	
{\$conjunctional_agent_fx}	#CONJUNCTIONAL_AGENT_FAX#	
{\$buyer_solicitor}	#BUYER_SOLICITOR#	
{\$buyer_solicitor_fn}	#BUYER_SOLICITOR_FIRSTNAME#	
{\$buyer_solicitor_sn}	#BUYER_SOLICITOR_SURNAME#	
{\$buyer_solicitor_cp}	#BUYER_SOLICITOR_COMPANY#	
{\$buyer_solicitor_dear}	#BUYER_SOLICITOR_SALUTATION#	
{\$buyer_solicitor_ph}	#BUYER_SOLICITOR_PHONE#	
{\$buyer_solicitor_mo}	#BUYER_SOLICITOR_MOBILE#	
{\$buyer_solicitor_em}	#BUYER_SOLICITOR_EMAIL#	
{\$buyer_solicitor_lh}	#BUYER_SOLICITOR_LETTER_HEAD#	
{\$buyer_solicitor_loc}	#BUYER_SOLICITOR_ADDRESS#	
{\$buyer_solicitor_fx}	#BUYER_SOLICITOR_FAX#	
{\$vendor_solicitor}	#VENDOR_SOLICITOR#	
{\$vendor_solicitor_fn}	#VENDOR_SOLICITOR_FIRSTNAME#	
{\$vendor_solicitor_sn}	#VENDOR_SOLICITOR_SURNAME#	
{\$vendor_solicitor_cp}	#VENDOR_SOLICITOR_COMPANY#	
{\$vendor_solicitor_dear}	#VENDOR_SOLICITOR_SALUTATION#	
{\$vendor_solicitor_ph}	#VENDOR_SOLICITOR_PHONE#	
{\$vendor_solicitor_mo}	#VENDOR_SOLICITOR_MOBILE#	
{\$vendor_solicitor_em}	#VENDOR_SOLICITOR_EMAIL#	

{ \$vendor_solicitor_lh }	#VENDOR_SOLICITOR_LETTER_HEAD#	
{ \$vendor_solicitor_loc }	#VENDOR_SOLICITOR_ADDRESS#	
{ \$vendor_solicitor_fx }	#VENDOR_SOLICITOR_FAX#	
{ \$auctioneer }	#AUCTIONEER#	
{ \$auctioneer_fn }	#AUCTIONEER_FIRSTNAME#	
{ \$auctioneer_sn }	#AUCTIONEER_SURNAME#	
{ \$auctioneer_cp }	#AUCTIONEER_COMPANY#	
{ \$auctioneer_dear }	#AUCTIONEER_SALUTATION#	
{ \$auctioneer_ph }	#AUCTIONEER_PHONE#	
{ \$auctioneer_mo }	#AUCTIONEER_MOBILE#	
{ \$auctioneer_em }	#AUCTIONEER_EMAIL#	
{ \$auctioneer_lh }	#AUCTIONEER_LETTER_HEAD#	
{ \$auctioneer_loc }	#AUCTIONEER_ADDRESS#	
{ \$auctioneer_fx }	#AUCTIONEER_FAX#	
{ \$business }	#BUSINESS#	
{ \$business_fn }	#BUSINESS_FIRSTNAME#	
{ \$business_sn }	#BUSINESS_SURNAME#	
{ \$business_cp }	#BUSINESS_COMPANY#	
{ \$business_dear }	#BUSINESS_SALUTATION#	
{ \$business_ph }	#BUSINESS_PHONE#	
{ \$business_mo }	#BUSINESS_MOBILE#	
{ \$business_em }	#BUSINESS_EMAIL#	
{ \$business_lh }	#BUSINESS_LETTER_HEAD#	
{ \$business_loc }	#BUSINESS_ADDRESS#	
{ \$business_fx }	#BUSINESS_FAX#	
{ \$prospective_vendor }	#PROSPECTIVE_VENDOR#	
{ \$prospective_vendor_fn }	#PROSPECTIVE_VENDOR_FIRSTNAME#	
{ \$prospective_vendor_sn }	#PROSPECTIVE_VENDOR_SURNAME#	
{ \$prospective_vendor_cp }	#PROSPECTIVE_VENDOR_COMPANY#	
{ \$prospective_vendor_dear }	#PROSPECTIVE_VENDOR_SALUTATION#	
{ \$prospective_vendor_ph }	#PROSPECTIVE_VENDOR_PHONE#	
{ \$prospective_vendor_mo }	#PROSPECTIVE_VENDOR_MOBILE#	
{ \$prospective_vendor_em }	#PROSPECTIVE_VENDOR_EMAIL#	
{ \$prospective_vendor_lh }	#PROSPECTIVE_VENDOR_LETTER_HEAD#	
{ \$prospective_vendor_loc }	#PROSPECTIVE_VENDOR_ADDRESS#	
{ \$prospective_vendor_fx }	#PROSPECTIVE_VENDOR_FAX#	
{ \$purchaser }	#PURCHASER#	
{ \$purchaser_fn }	#PURCHASER_FIRSTNAME#	
{ \$purchaser_sn }	#PURCHASER_SURNAME#	
{ \$purchaser_cp }	#PURCHASER_COMPANY#	
{ \$purchaser_dear }	#PURCHASER_SALUTATION#	
{ \$purchaser_ph }	#PURCHASER_PHONE#	
{ \$purchaser_mo }	#PURCHASER_MOBILE#	
{ \$purchaser_em }	#PURCHASER_EMAIL#	
{ \$purchaser_lh }	#PURCHASER_LETTER_HEAD#	
{ \$purchaser_loc }	#PURCHASER_ADDRESS#	
{ \$purchaser_fx }	#PURCHASER_FAX#	
{ \$prospective_landlord }	#PROSPECTIVE_LANDLORD#	

{\$prospective_landlord_fn}	#PROSPECTIVE_LANDLORD_FIRSTNAME#	
{\$prospective_landlord_sn}	#PROSPECTIVE_LANDLORD_SURNAME#	
{\$prospective_landlord_cp}	#PROSPECTIVE_LANDLORD_COMPANY#	
{\$prospective_landlord_dear}	#PROSPECTIVE_LANDLORD_SALUTATION#	
{\$prospective_landlord_ph}	#PROSPECTIVE_LANDLORD_PHONE#	
{\$prospective_landlord_mo}	#PROSPECTIVE_LANDLORD_MOBILE#	
{\$prospective_landlord_em}	#PROSPECTIVE_LANDLORD_EMAIL#	
{\$prospective_landlord_lh}	#PROSPECTIVE_LANDLORD_LETTER_HEAD#	
{\$prospective_landlord_loc}	#PROSPECTIVE_LANDLORD_ADDRESS#	
{\$prospective_landlord_fx}	#PROSPECTIVE_LANDLORD_FAX#	
{\$past_purchaser}	#PAST_PURCHASER#	
{\$past_purchaser_fn}	#PAST_PURCHASER_FIRSTNAME#	
{\$past_purchaser_sn}	#PAST_PURCHASER_SURNAME#	
{\$past_purchaser_cp}	#PAST_PURCHASER_COMPANY#	
{\$past_purchaser_dear}	#PAST_PURCHASER_SALUTATION#	
{\$past_purchaser_ph}	#PAST_PURCHASER_PHONE#	
{\$past_purchaser_mo}	#PAST_PURCHASER_MOBILE#	
{\$past_purchaser_em}	#PAST_PURCHASER_EMAIL#	
{\$past_purchaser_lh}	#PAST_PURCHASER_LETTER_HEAD#	
{\$past_purchaser_loc}	#PAST_PURCHASER_ADDRESS#	
{\$past_purchaser_fx}	#PAST_PURCHASER_FAX#	
{\$past_vendor}	#PAST_VENDOR#	
{\$past_vendor_fn}	#PAST_VENDOR_FIRSTNAME#	
{\$past_vendor_sn}	#PAST_VENDOR_SURNAME#	
{\$past_vendor_cp}	#PAST_VENDOR_COMPANY#	
{\$past_vendor_dear}	#PAST_VENDOR_SALUTATION#	
{\$past_vendor_ph}	#PAST_VENDOR_PHONE#	
{\$past_vendor_mo}	#PAST_VENDOR_MOBILE#	
{\$past_vendor_em}	#PAST_VENDOR_EMAIL#	
{\$past_vendor_lh}	#PAST_VENDOR_LETTER_HEAD#	
{\$past_vendor_loc}	#PAST_VENDOR_ADDRESS#	
{\$past_vendor_fx}	#PAST_VENDOR_FAX#	
{\$other}	#OTHER#	
{\$other_fn}	#OTHER_FIRSTNAME#	
{\$other_sn}	#OTHER_SURNAME#	
{\$other_cp}	#OTHER_COMPANY#	
{\$other_dear}	#OTHER_SALUTATION#	
{\$other_ph}	#OTHER_PHONE#	
{\$other_mo}	#OTHER_MOBILE#	
{\$other_em}	#OTHER_EMAIL#	
{\$other_lh}	#OTHER_LETTER_HEAD#	
{\$other_loc}	#OTHER_ADDRESS#	
{\$other_fx}	#OTHER_FAX#	
{\$contact}	#CONTACT#	
{\$contact_fn}	#CONTACT_FIRSTNAME#	
{\$contact_sn}	#CONTACT_SURNAME#	

{ \$contact_cp }	#CONTACT_COMPANY#	
{ \$contact_dear }	#CONTACT_SALUTATION#	
{ \$contact_ph }	#CONTACT_PHONE#	
{ \$contact_mo }	#CONTACT_MOBILE#	
{ \$contact_em }	#CONTACT_EMAIL#	
{ \$contact_lh }	#CONTACT_LETTER_HEAD#	
{ \$contact_loc }	#CONTACT_ADDRESS#	
{ \$contact_fx }	#CONTACT_FAX#	
{ \$resident }	#RESIDENT#	draws from an attached tenant or own
{ \$resident_fn }	#RESIDENT_FIRSTNAME#	
{ \$resident_sn }	#RESIDENT_SURNAME#	
{ \$resident_cp }	#RESIDENT_COMPANY#	
{ \$resident_dear }	#RESIDENT_SALUTATION#	
{ \$resident_ph }	#RESIDENT_PHONE#	
{ \$resident_mo }	#RESIDENT_MOBILE#	
{ \$resident_em }	#RESIDENT_EMAIL#	
{ \$resident_lh }	#RESIDENT_LETTER_HEAD#	
{ \$resident_loc }	#RESIDENT_ADDRESS#	
{ \$resident_fx }	#RESIDENT_FAX#	
PROPERTY VARIABLES		
{ \$prop_loc }	#PROPERTY_ADDRESS#	
{ \$prop_deposit }	#PROPERTY_DEPOSIT#	
{ \$prop_settle }	#PROPERTY_SETTLEMENT_DATE#	
{ \$prop_auc }	#PROPERTY_AUCTION_DATE#	
{ \$prop_sdate }	#PROPERTY_SOLD_DATE#	
{ \$prop_commis }	#PROPERTY_COMMISION#	
{ \$prop_adj }	#PROPERTY_ADJUSTMENT#	placeholder only - does not retrieve a
{ \$prop_appdate }	#PROPERTY_APPRAISAL_DATE#	
{ \$prop_apptime }	#PROPERTY_APPRAISAL_TIME#	
{ \$prop_exchg }	#PROPERTY_EXCHANGE_DATE#	
{ \$disp_price }	#PROPERTY_ASKING_PRICE#	
{ \$sold_price }	#PROPERTY_SOLD_PRICE#	
{ \$prop_app_price_fm }	#PROPERTY_APPRAISAL_PRICE_FROM#	
{ \$prop_app_price_to }	#PROPERTY_APPRAISAL_PRICE_TO#	
{ \$prop_app_price }	#PROPERTY_APPRAISAL_PRICE#	
{ \$prop_bed }	#PROPERTY_BEDROOM#	
{ \$prop_bath }	#PROPERTY_BATHROOM#	
{ \$prop_garage }	#PROPERTY_GARAGE#	
{ \$prop_car_space }	#PROPERTY_CAR_SPACE#	
{ \$prop_carport }	#PROPERTY_CARPOR#	
{ \$prop_cooloff }	#PROPERTY_COOL_OFF_DATE#	
{ \$prop_listing_expiry_date }	#PROPERTY_LISTING_EXPIRY_DATE#	
{ \$prop_land_size }	#PROPERTY_LAND_SIZE#	
{ \$prop_external_size }	#PROPERTY_EXTERNAL_SIZE#	
{ \$prop_strata_rate }	#PROPERTY_STRATA_RATES#	
{ \$prop_council_rate }	#PROPERTY_COUNCIL_RATES#	
{ \$prop_water_rate }	#PROPERTY_WATER_RATES#	
{ \$prop_catg }	#PROPERTY_CATEGORY#	

{ \$prop_auth }	#PROPERTY_LISTING_TYPE#	
{ \$prop_mail_address }	#PROPERTY_MAIL_ADDRESS#	
AGENT /OFFICE VARIABLES		
{ \$listing_agent }	#LISTING_AGENT#	
{ \$listing_agent_fn }	#LISTING_AGENT_FIRST_NAME#	
{ \$listing_agent_sn }	#LISTING_AGENT_LAST_NAME#	
{ \$listing_agent_mobile }	#LISTING_AGENT_MOBILE#	
{ \$listing_agent_email }	#LISTING_AGENT_EMAIL#	
{ \$listing_agent_jobtitle }	#LISTING_AGENT_JOB_TITLE#	
{ \$property_manager }	#PROPERTY_MANAGER#	
{ \$property_manager_fn }	#PROPERTY_MANAGER_FIRST_NAME#	
{ \$property_manager_sn }	#PROPERTY_MANAGER_LAST_NAME#	
{ \$property_manager_mobile }	#PROPERTY_MANAGER_MOBILE#	
{ \$property_manager_email }	#PROPERTY_MANAGER_EMAIL#	
{ \$property_manager_jobtitle }	#PROPERTY_MANAGER_JOB_TITLE#	
{ \$associate_agent }	#ASSOCIATE_AGENT#	
{ \$associate_agent_fn }	#ASSOCIATE_AGENT_FIRST_NAME#	
{ \$associate_agent_sn }	#ASSOCIATE_AGENT_LAST_NAME#	
{ \$associate_agent_mobile }	#ASSOCIATE_AGENT_MOBILE#	
{ \$associate_agent_email }	#ASSOCIATE_AGENT_EMAIL#	
{ \$associate_agent_jobtitle }	#ASSOCIATE_AGENT_JOB_TITLE#	
{ \$selling_agent }	#SELLING_AGENT#	
{ \$selling_agent_fn }	#SELLING_AGENT_FIRST_NAME#	
{ \$selling_agent_sn }	#SELLING_AGENT_LAST_NAME#	
{ \$selling_agent_mobile }	#SELLING_AGENT_MOBILE#	
{ \$selling_agent_email }	#SELLING_AGENT_EMAIL#	
{ \$selling_agent_jobtitle }	#SELLING_AGENT_JOB_TITLE#	
{ \$property_assistant }	#PROPERTY_ASSISTANT#	
{ \$property_assistant_fn }	#PROPERTY_ASSISTANT_FIRST_NAME#	
{ \$property_assistant_sn }	#PROPERTY_ASSISTANT_LAST_NAME#	
{ \$property_assistant_mobile }	#PROPERTY_ASSISTANT_MOBILE#	
{ \$property_assistant_email }	#PROPERTY_ASSISTANT_EMAIL#	
{ \$property_assistant_jobtitle }	#PROPERTY_ASSISTANT_JOB_TITLE#	
{ \$referral_agent }	#REFERRAL_AGENT#	
{ \$referral_agent_fn }	#REFERRAL_AGENT_FIRST_NAME#	
{ \$referral_agent_sn }	#REFERRAL_AGENT_LAST_NAME#	
{ \$referral_agent_mobile }	#REFERRAL_AGENT_MOBILE#	
{ \$referral_agent_email }	#REFERRAL_AGENT_EMAIL#	
{ \$referral_agent_jobtitle }	#REFERRAL_AGENT_JOB_TITLE#	
{ \$appraisal_agent }	#APPRAISAL_AGENT#	
{ \$appraisal_agent_fn }	#APPRAISAL_AGENT_FIRST_NAME#	
{ \$appraisal_agent_sn }	#APPRAISAL_AGENT_LAST_NAME#	
{ \$appraisal_agent_mobile }	#APPRAISAL_AGENT_MOBILE#	
{ \$appraisal_agent_email }	#APPRAISAL_AGENT_EMAIL#	
{ \$appraisal_agent_jobtitle }	#APPRAISAL_AGENT_JOB_TITLE#	
{ \$mname }	#AGENT STAFF NAME#	
{ \$mtitle }	#AGENT STAFF JOB TITLE#	
{ \$mmobile }	#AGENT MOBILE#	

{ \$m_em }	#AGENT EMAIL#	
{ \$mof_ph }	#OFFICE NUMBER#	
{ \$mof_fx }	#OFFICE FAX#	
{ \$moffice }	#AGENT OFFICE#	
{ \$maddress }	#OFFICE ADDRESS#	

E-Newsletters

E-Newsletters



You can access the E-Newsletter tool using the E-Newsletter Action Icon on the property and various search results and target lists.

[How do I send an E-Newsletter all Newsletter Subscribers?](#)

[How do I create an E-Newsletter?](#)

[How do I enter an Auction Timetable, Current Listings, Feature Property, News Item, OFI or Sold Properties to my E-Newsletter in Agentbox?](#)

[How do I edit the content of my E-Newsletter?](#)

[How do I remove a section placed in my E Newsletter?](#)

Send Bulk E-Newsletter

How do I send an E-Newsletter all Newsletter Subscribers?

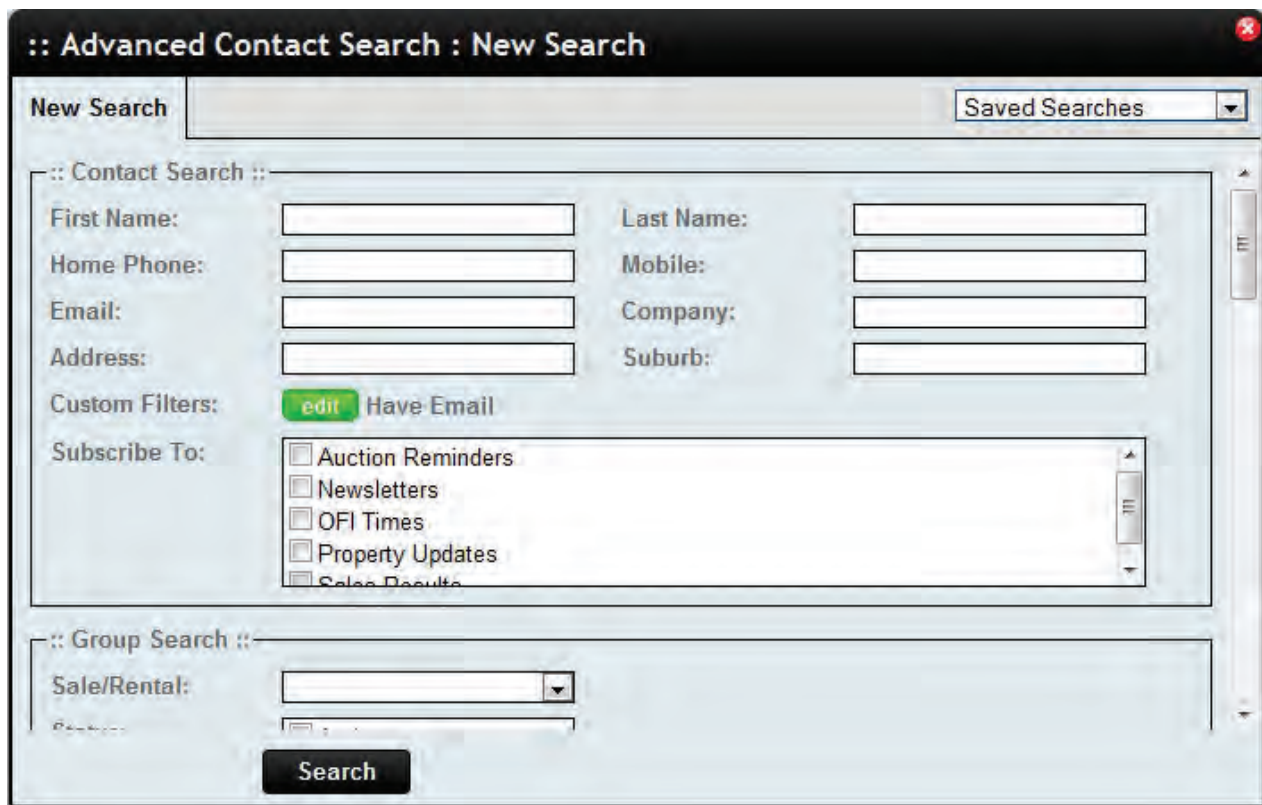
1. Open an Advanced Contact Search

A screenshot of a web application window titled "Advanced Contact Search : New Search". The window has a dark header bar with the title and a close button. Below the header, there are two tabs: "New Search" (selected) and "Saved Searches". The main content area is divided into sections. The "Contact Search" section contains several input fields: "First Name:", "Last Name:", "Home Phone:", "Mobile:", "Email:", "Company:", "Address:", and "Suburb:". Below these is a "Custom Filters" section with a green "edit" button and the text "No filters created yet.". The "Subscribe To:" section has a list of checkboxes: "Auction Reminders", "Newsletters", "OFI Times", "Property Updates", and "Sales Results". The "Group Search" section has a "Sale/Rental:" dropdown menu. At the bottom of the window is a large black "Search" button.

2. Add Filter: Have Email (this is not required however it will give you a more accurate target list. For example you might have 456 contacts in your search but only 324 have an email address).



3. Click Save



3. Tick Newsletters under Subscribe To:

:: Advanced Contact Search : New Search

New Search Saved Searches

:: Contact Search ::

First Name: Last Name:

Home Phone: Mobile:

Email: Company:

Address: Suburb:

Custom Filters: edit Have Email

Subscribe To:

- Auction Reminders
- Newsletters
- OFI Times
- Property Updates
- Sales Results

:: Group Search ::





Sale/Rental:













Search

4. Click Search

:: Advanced Contact Search : Search Results(7 contacts found)

New Search **Search Results** Refine Search Saved Searches

Sort By:





Contact	Assigned Staff	Last Contacted	Contact Info
Jack Black	John Smith		@ 
Gary Brown	John Smith		@  
Michael Johnson	John Smith	02/11/11	@  
Sam Jones	John Smith		@  
Samantha Jones	John Smith	10/11/11	@  
Mary May	John Smith	11/11/11	@  
Charles Roberts	John Smith		@ 

5. Click on the E-Newsletter action icon

**Note: These contacts will appear as recipients.*

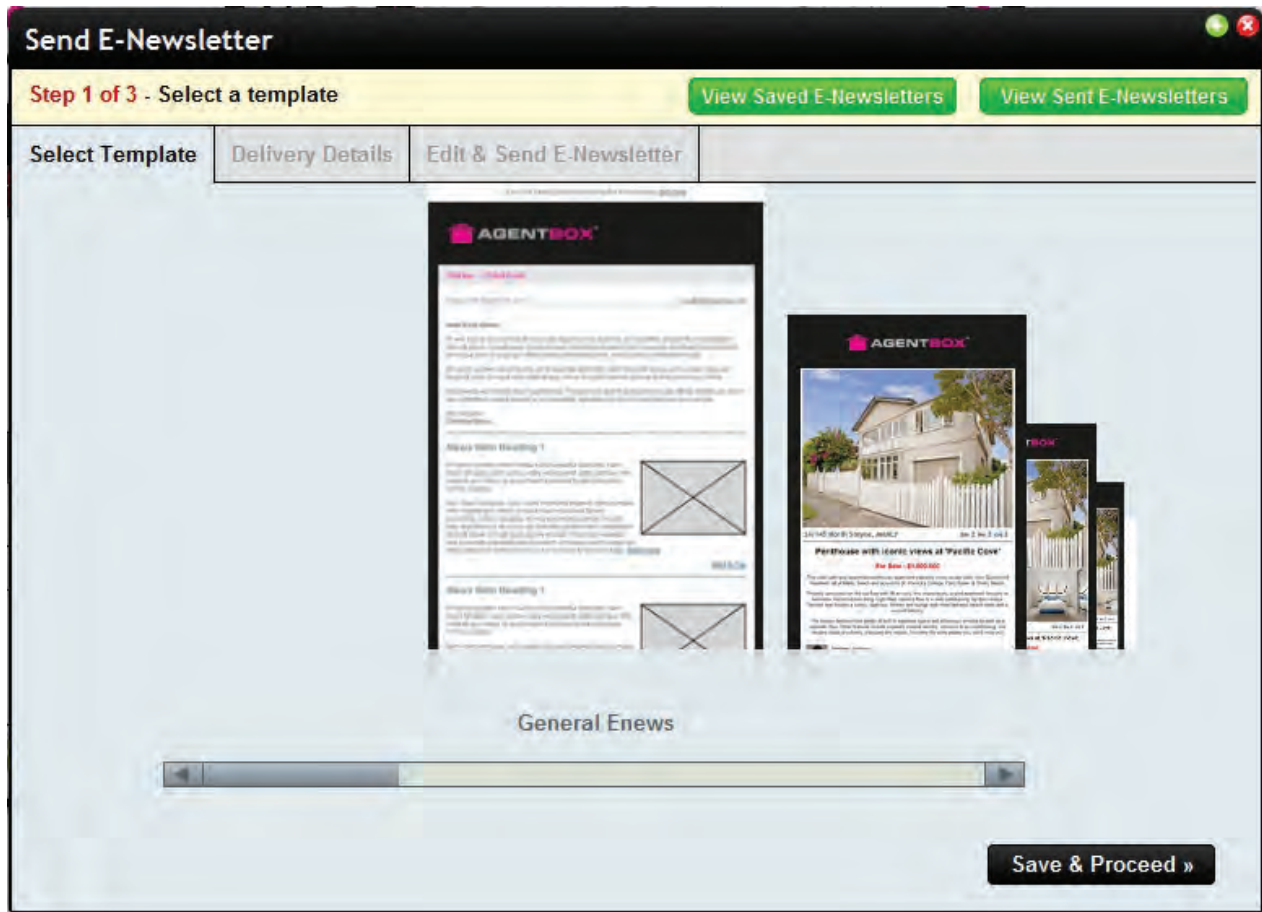
6. Follow the steps under [How to Create an E-Newsletter](#)

Create an E-Newsletter

How do I create an E-Newsletter?

You may send an E-Newsletter to a single contact or to a list of contacts (provided they are subscribed to receive E-Newsletters). To do this you can go through the [property card](#), the [contact card](#) or following an [advanced contact search](#). To generate an E-Newsletter, follow the steps below.

1. Click on the E-Newsletter Action icon .



2. Select a template.
3. Refine the recipients list (not available if sending direct to a single contact via their contact card).
4. Enter the E-Newsletter Subject.

Send E-Newsletter

Step 2 of 3 - Edit your delivery details [View Saved E-Newsletters](#) [View Sent E-Newsletters](#)

Select Template | **Delivery Details** | Edit & Send E-Newsletter

Delivery To: 7 record(s) found.

[Refine](#)

[Tick All](#)

[Untick All](#)

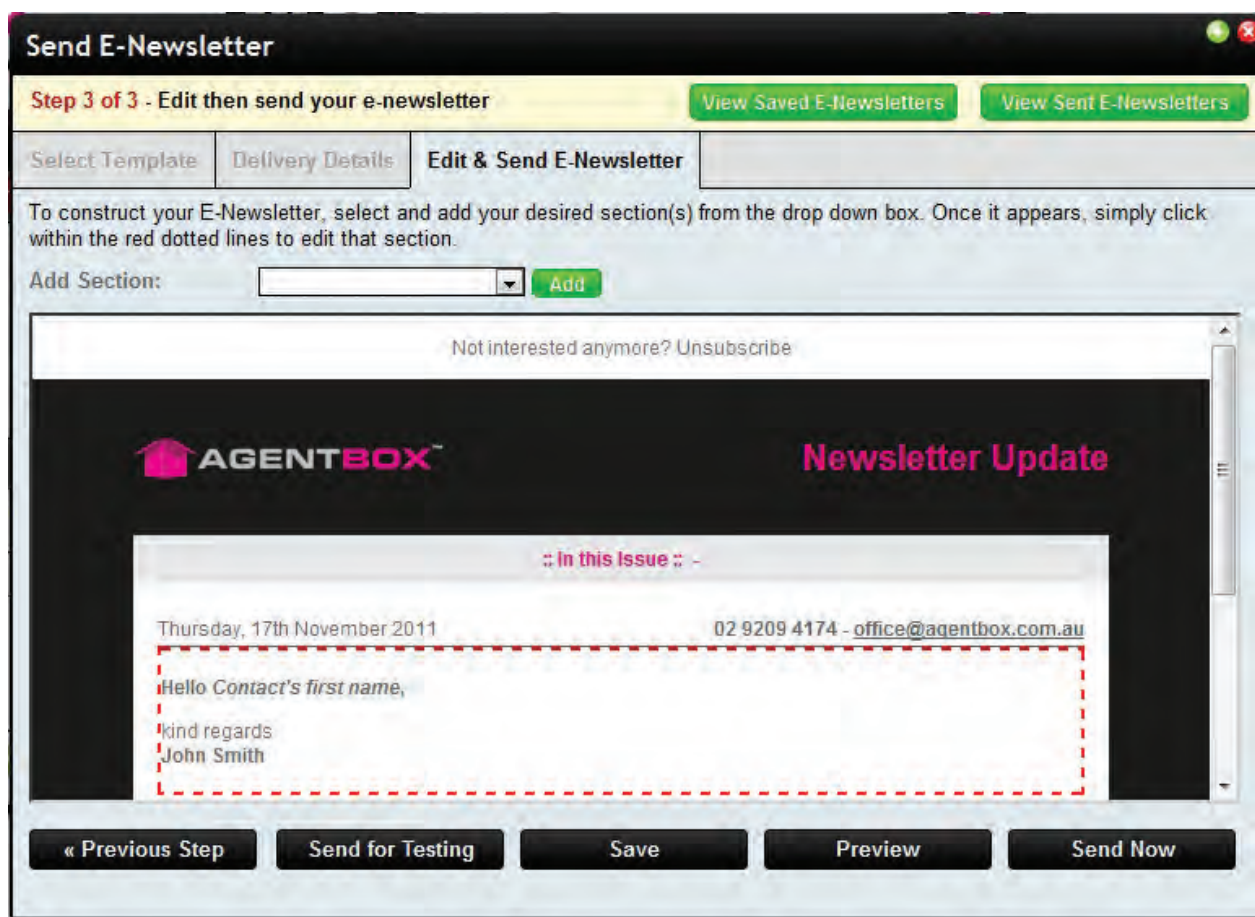
- Jack Black (jack@hotmail.com)
- Gary Brown (gary.brown@hotmail.com)
- Michael Jones (mick@gmail.com)
- Sam Jones (sam@hotmail.com)
- Samantha Jones (samantha@hotmail.com)
- Mary May (mm@hotmail.com)
- Charles Roberts (charles@gmail.com)

Reply From: John Smith (john@agentbox.com.au)

Subject: * Agentbox July News

[« Previous Step](#) [Save & Proceed »](#)

5. Add sections by selecting from the drop down menu and clicking add, to edit/remove a section click inside the red dotted lines and an edit box will open.



*Note:

- The sections will be inserted in the order you add them.
- If you create an e-newsletter via a property or advanced property search it can only be accessed from other properties or property searches.
- If you create an e-newsletter via a contact or advanced contact search it can only be accessed from other contacts or contact searches.

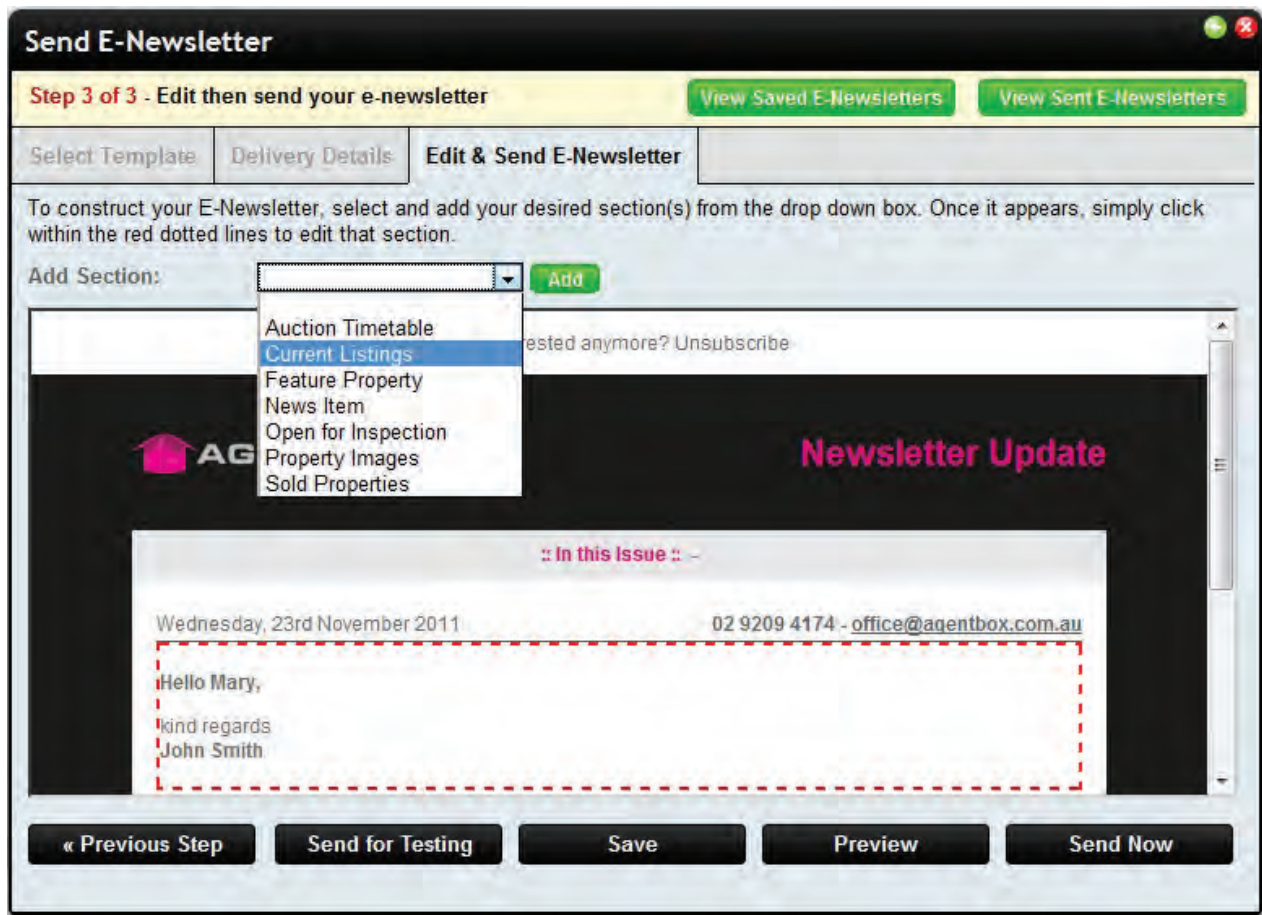
Add E-Newsletter Sections

How do I enter an Auction Timetable, Current Listings, Feature Property, News Item, OFI or Sold Properties etc to my E-Newsletter in Agentbox?

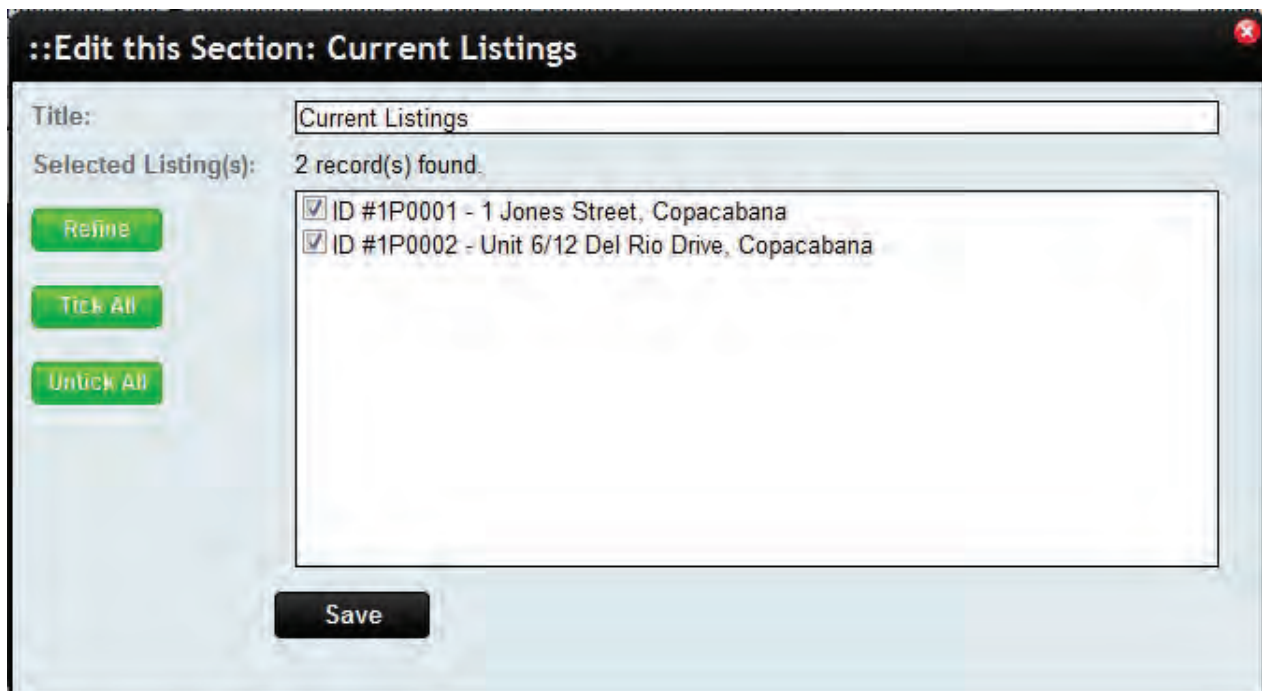
1. Click on the Add Source drop down
2. Select Option
3. Click on Add

Current Listings will be used for this example:

4. Select Current Listings to add to your E-Newsletter



5. Click on Add



6. Click on Save

7. Current Listings will be added to your E-Newsletter

Send E-Newsletter









Step 3 of 3 - Edit then send your e-newsletter [View Saved E-Newsletters](#) [View Sent E-Newsletters](#)

Select Template | Delivery Details | **Edit & Send E-Newsletter**

To construct your E-Newsletter, select and add your desired section(s) from the drop down box. Once it appears, simply click within the red dotted lines to edit that section.

Add Section: [Add](#)

Current Listings

	<ul style="list-style-type: none">  3 Copacabana, 1 Jones Street Contact Agent  4 Luxury Balinese Inspired Residence  2 Don't miss out on this one! Relax in your open plan living area, opening...more details
	<ul style="list-style-type: none">  3 Copacabana, Unit 6/12 Del Rio Drive Offers over \$950,000  2 Oasis By the Sea  2 Low maintenance living is ensured in this superbly appointed, large 3 be...more details

[Back to Top](#)

« Previous Step [Send for Testing](#) [Save](#) [Preview](#) [Send Now](#)

Edit E-Newsletter Section

How do I edit the content of my E-Newsletter?

1. Click on the section highlighted by a red dashed line you wish to edit

Send E-Newsletter









Step 3 of 3 - Edit then send your e-newsletter [View Saved E-Newsletters](#) [View Sent E-Newsletters](#)

Select Template | Delivery Details | **Edit & Send E-Newsletter**

To construct your E-Newsletter, select and add your desired section(s) from the drop down box. Once it appears, simply click within the red dotted lines to edit that section.

Add Section: [Add](#)

Current Listings

	<ul style="list-style-type: none">  3 Copacabana, 1 Jones Street Contact Agent  4 Luxury Balinese Inspired Residence  2 Don't miss out on this one! Relax in your open plan living area, opening...more details
	<ul style="list-style-type: none">  3 Copacabana, Unit 6/12 Del Rio Drive Offers over \$950,000  2 Oasis By the Sea  2 Low maintenance living is ensured in this superbly appointed, large 3 be...more details

[Back to Top](#)

« Previous Step | **Send for Testing** | Save | Preview | Send Now

2. Edit as you wish

::Edit this Section: Current Listings

Title:

Selected Listing(s): 2 record(s) found.

[Refine](#)

[Tick All](#)

[Unlock All](#)

- ID #1P0001 - 1 Jones Street, Copacabana
- ID #1P0002 - Unit 6/12 Del Rio Drive, Copacabana

[Save](#) [Remove Section](#)

3. Click on Save

Send E-Newsletter

Step 3 of 3 - Edit then send your e-newsletter [View Saved E-Newsletters](#) [View Sent E-Newsletters](#)





Select Template | Delivery Details | **Edit & Send E-Newsletter**

To construct your E-Newsletter, select and add your desired section(s) from the drop down box. Once it appears, simply click within the red dotted lines to edit that section.

Add Section: [Add](#)

John Smith

Current Listings

	 3	Copacabana, 1 Jones Street	Contact Agent
	 4	Luxury Balinese Inspired Residence	
	 2	Don't miss out on this one! Relax in your open plan living area, opening... more details	

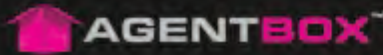
[Back to Top](#)

4 Cornwallis Street, Eveleigh NSW 2015
P: 02 9209 4174 | F: 02 9310 7232 | E: office@agentbox.com.au

[« Previous Step](#) [Send for Testing](#) [Save](#) [Preview](#) [Send Now](#)

4. Click on Preview to view the contents of your Newsletter

Not interested anymore? [Unsubscribe](#)



Newsletter Update

:: In this Issue :: -| Current Listings

Wednesday, 23rd November 2011

02 9209 4174 - office@agentbox.com.au

Hello Mary,

kind regards
John Smith

Current Listings



3

Copacabana, 1 Jones Street

[Contact Agent](#)



4

Luxury Balinese Inspired Residence



2

Don't miss out on this one! Relax in your open plan living area, opening...[more details](#)

[^ Back to Top](#)

4 Cornwallis Street, Eveleigh NSW 2015
P: 02 9209 4174 | F: 02 9310 7232 | E: office@agentbox.com.au

The sender believes that this E-mail and any attachments were free of any virus, worm, Trojan horse, and/or malicious code when sent. This message and its attachments could have been infected during transmission. By reading the message and opening any attachments, the recipient accepts full responsibility for taking protective and remedial action about viruses and other defects. The sender's employer is not

Remove E-Newsletter Sections

How do I remove a section placed in my E Newsletter in Agentbox?

1. Click on the area surrounded by a red dashed line you wish to remove

Send E-Newsletter









Step 3 of 3 - Edit then send your e-newsletter [View Saved E-Newsletters](#) [View Sent E-Newsletters](#)

Select Template | Delivery Details | **Edit & Send E-Newsletter**

To construct your E-Newsletter, select and add your desired section(s) from the drop down box. Once it appears, simply click within the red dotted lines to edit that section.

Add Section: [Add](#)

Current Listings

	<ul style="list-style-type: none">  3 Copacabana, 1 Jones Street Contact Agent  4 Luxury Balinese Inspired Residence  2 Don't miss out on this one! Relax in your open plan living area, opening...more details
	<ul style="list-style-type: none">  3 Copacabana, Unit 6/12 Del Rio Drive Offers over \$950,000  2 Oasis By the Sea  2 Low maintenance living is ensured in this superbly appointed, large 3 be...more details

[Back to Top](#)

« Previous Step [Send for Testing](#) [Save](#) [Preview](#) [Send Now](#)

::Edit this Section: Current Listings

Title:

Selected Listing(s): 2 record(s) found.

[Refine](#)

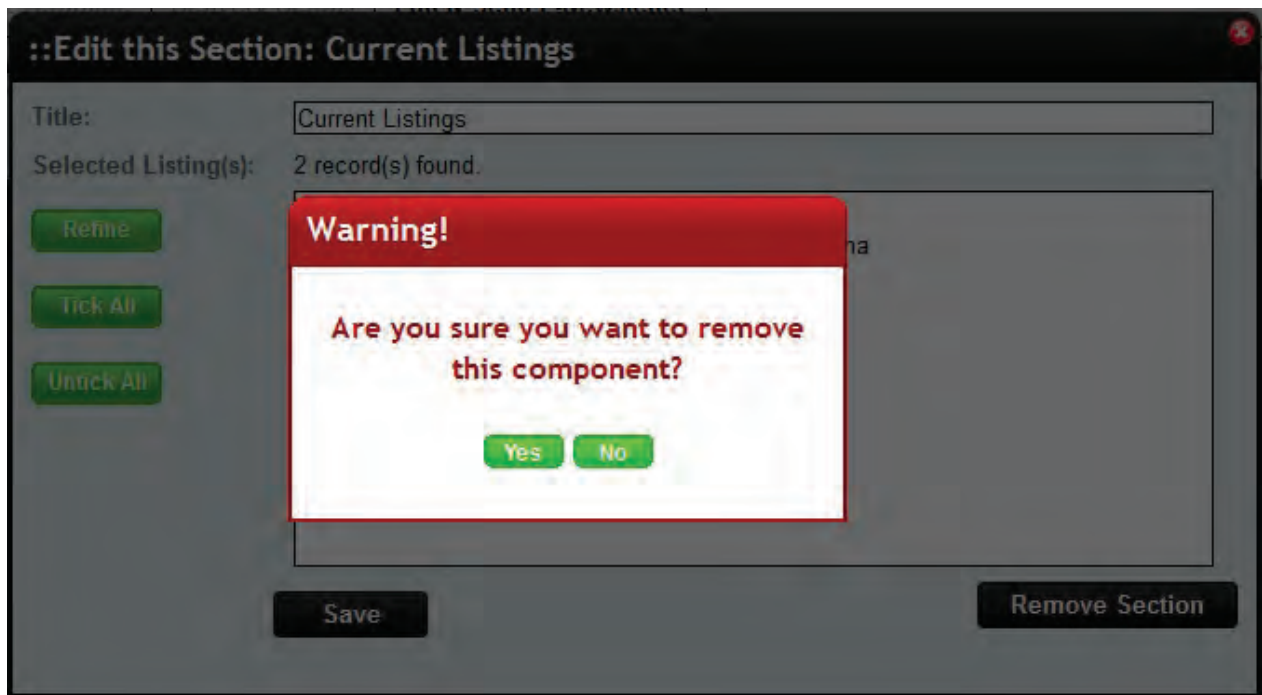
[Tick All](#)

[Untick All](#)

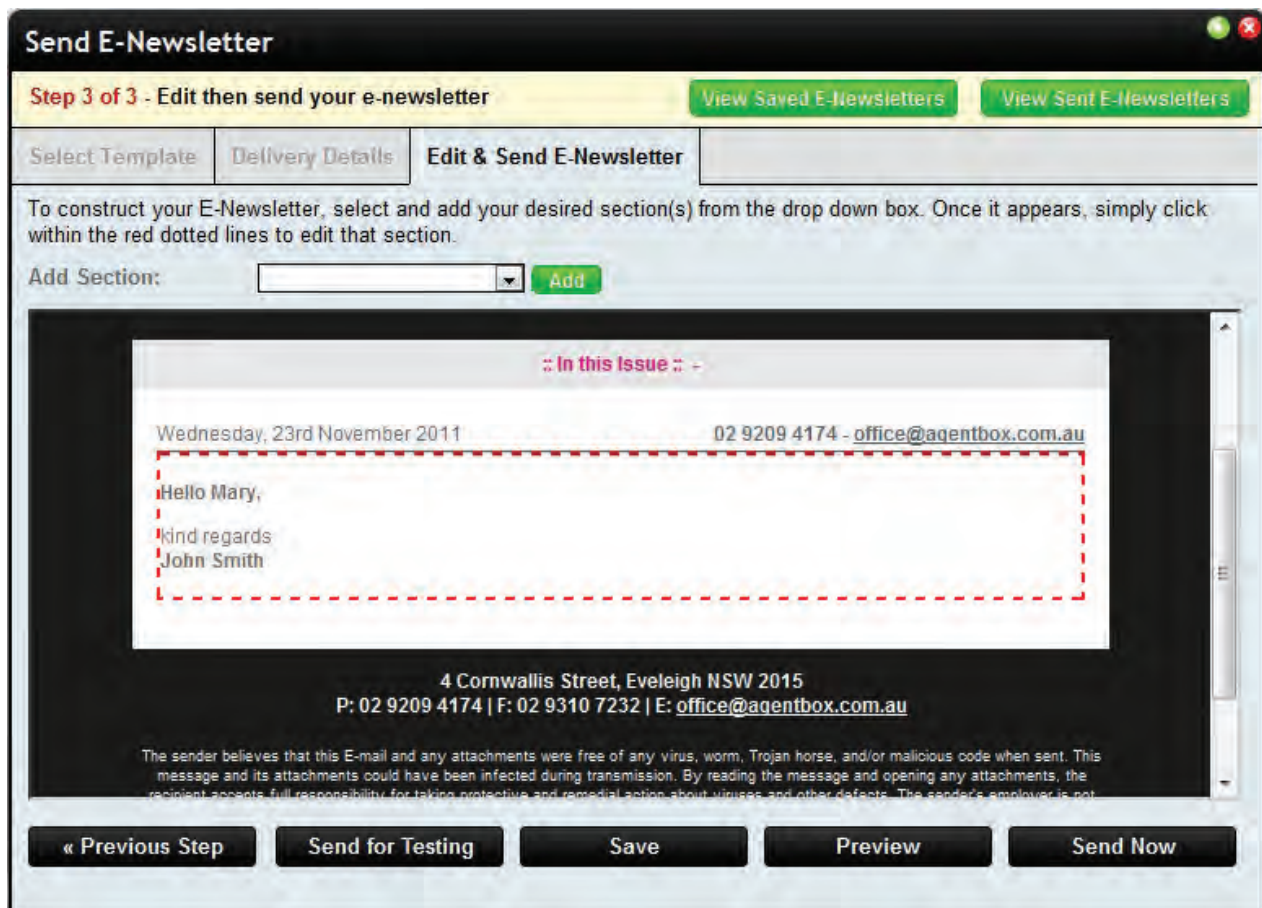
- ID #1P0001 - 1 Jones Street, Copacabana
- ID #1P0002 - Unit 6/12 Del Rio Drive, Copacabana

[Save](#) [Remove Section](#)

2. Click on Remove Section



3. Click Yes



General FAQ

Frequently Asked Questions

Below are commonly asked questions to our support team. If you can't find the answer here you can contact the support team between 9am - 5pm Sydney time, Monday to Friday on (02) 9209 4174 or email support@agentbox.com.au.

[How do I remove URL details and the footer from the Property Stocklist?](#)

[How to Insert Custom Images into E-Newsletters?](#)

[How to Insert Custom Links into E-Newsletter?](#)

[How do I attach a file to an E-Newsletter?](#)

[Changing a property status?](#)

[My log in isn't working!](#)

[I can't view the log in page or my website but I can view all other websites.](#)

[Why can't I make a property Available?](#)

[Why is Agentbox saying the property I am entering is a duplicate?](#)

[How do I download a CSV file of my Contacts?](#)

[How do I set up the SMS tool and how do I allocate credits to staff?](#)

[Allocate SMS Access to Fellow Staff Members](#)

[I cannot find my photo file on my computer.](#)

[Why can't I upload photos and/or documents?](#)

[How do I access Agentbox on my iPhone, iPad or Smart phone?](#)

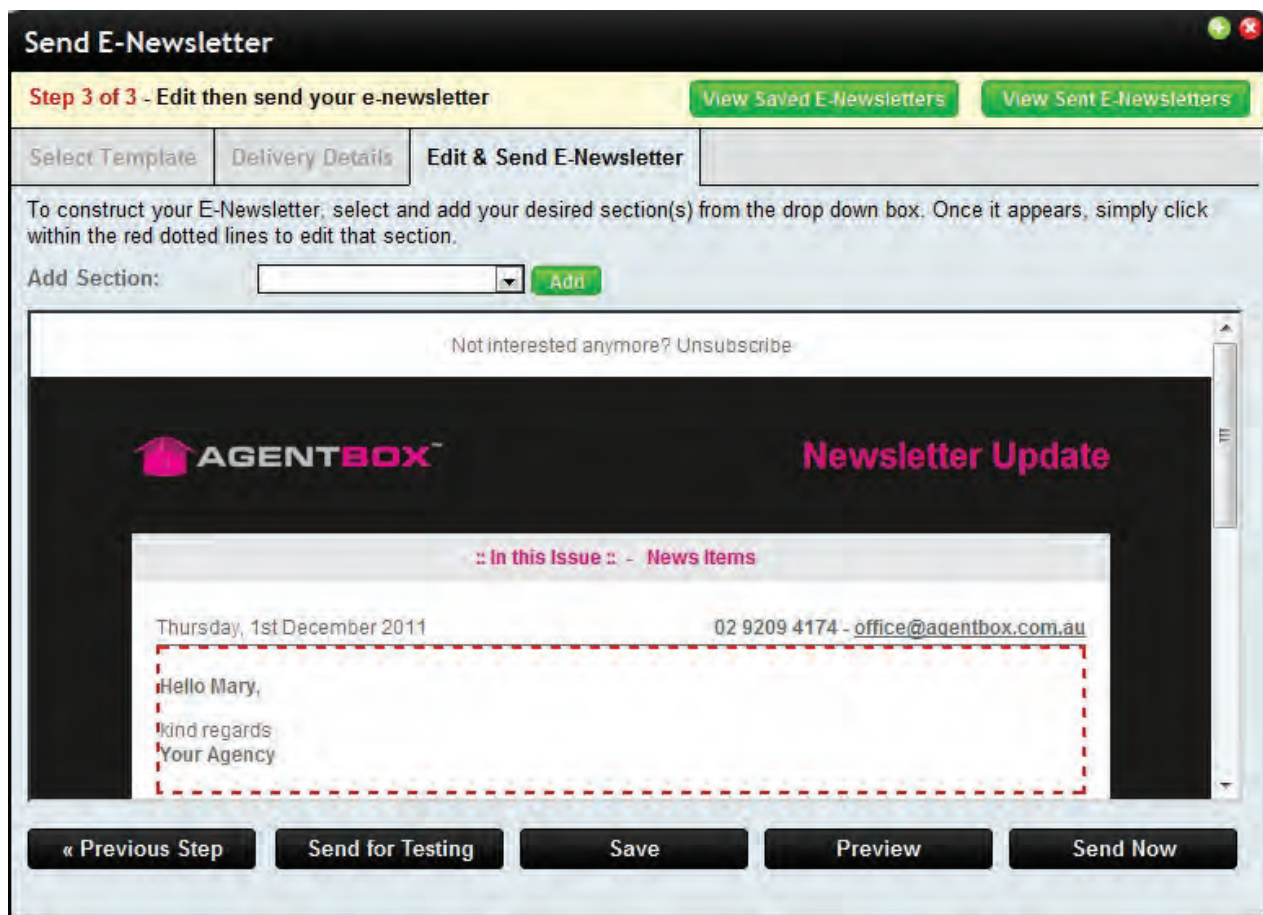
[What is the difference between Unsubscribed, Do Not Contact and Archived Contacts?](#)

[Why is Agentbox telling me my Contact's email address is invalid?](#)

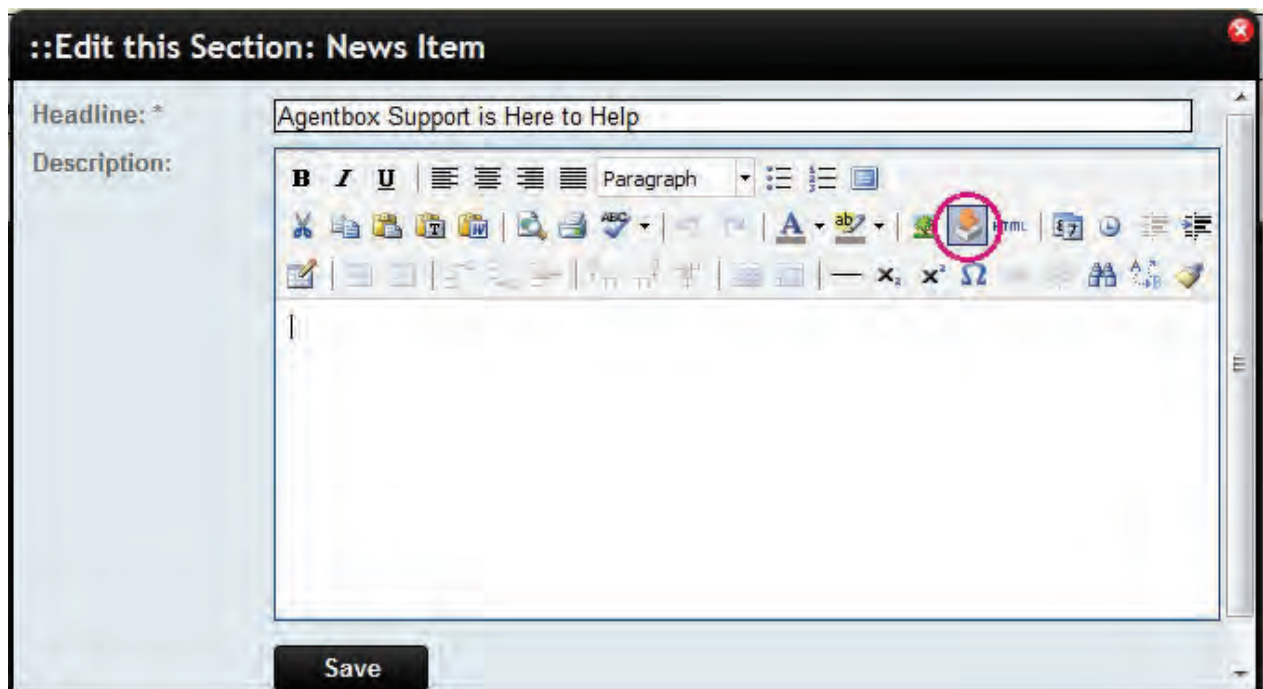
Insert Images to E-Newsletters

How to Insert Custom Images into E-Newsletters

1. Open an E-Newsletter Template.
2. Click within the red dotted box to edit an existing section or add a new E-Newsletter section from the Add Section drop down.



3. Click on the Custom Upload icon 



Click the 'Browse Files' button to go and select the files you wish to upload from your local computer. Then select 'Upload' to confirm the files to publish.



:: File(s) Upload ::

Browse Files

Overall progress

0%

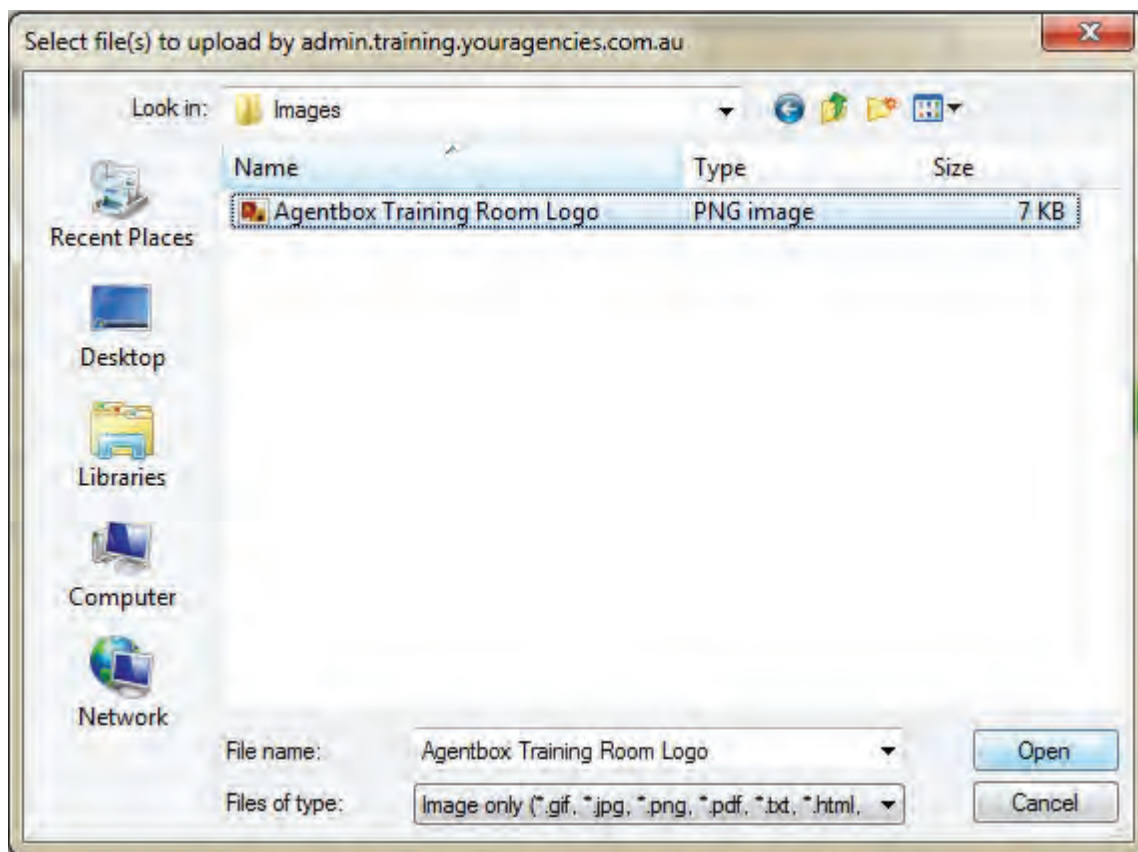
File Progress

0%

Clear List **Upload**

:: Selected Files ::

4. Select Browse and select the image you want to upload and click Open.



5. Click Upload

Click the 'Browse Files' button to go and select the files you wish to upload from your local computer. Then select 'Upload' to confirm the files to publish.

:: File(s) Upload ::

Browse Files

Overall progress


0%

File Progress

0%

Clear List **Upload**

:: Selected Files ::

	Agentbox Training Room Logo.png	6.5 kB
---	---------------------------------	--------


6. Select the insert image icon .

::Edit this Section: News Item

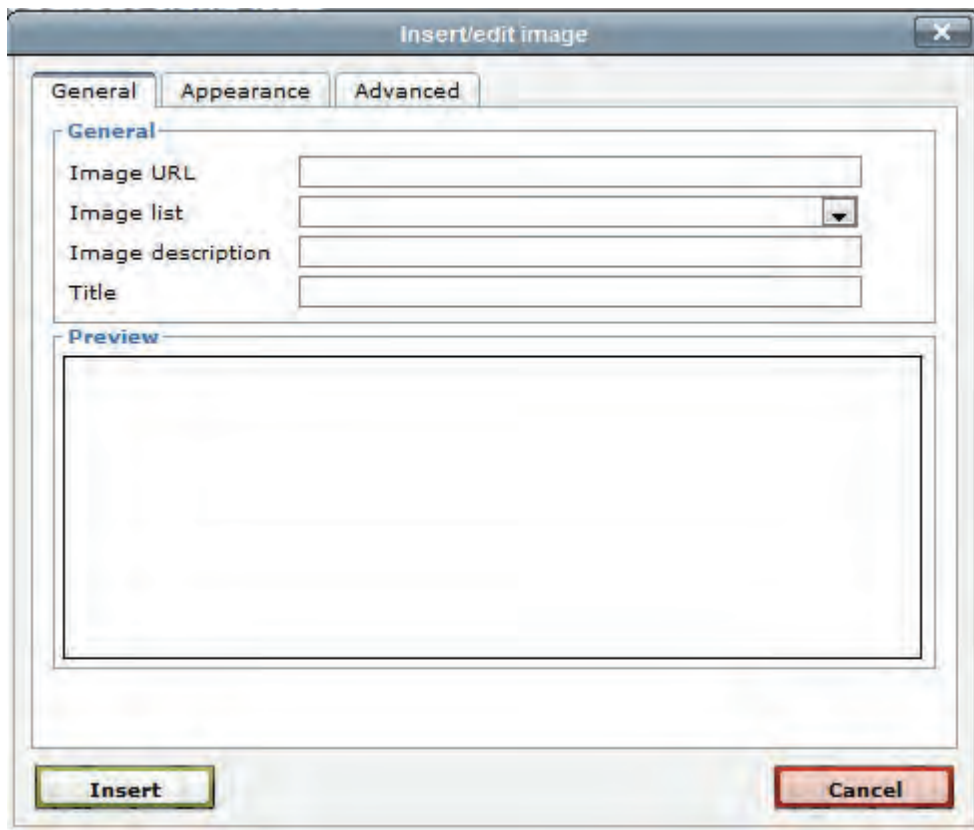
Headline: * Agentbox Support is Here to Help

Description:

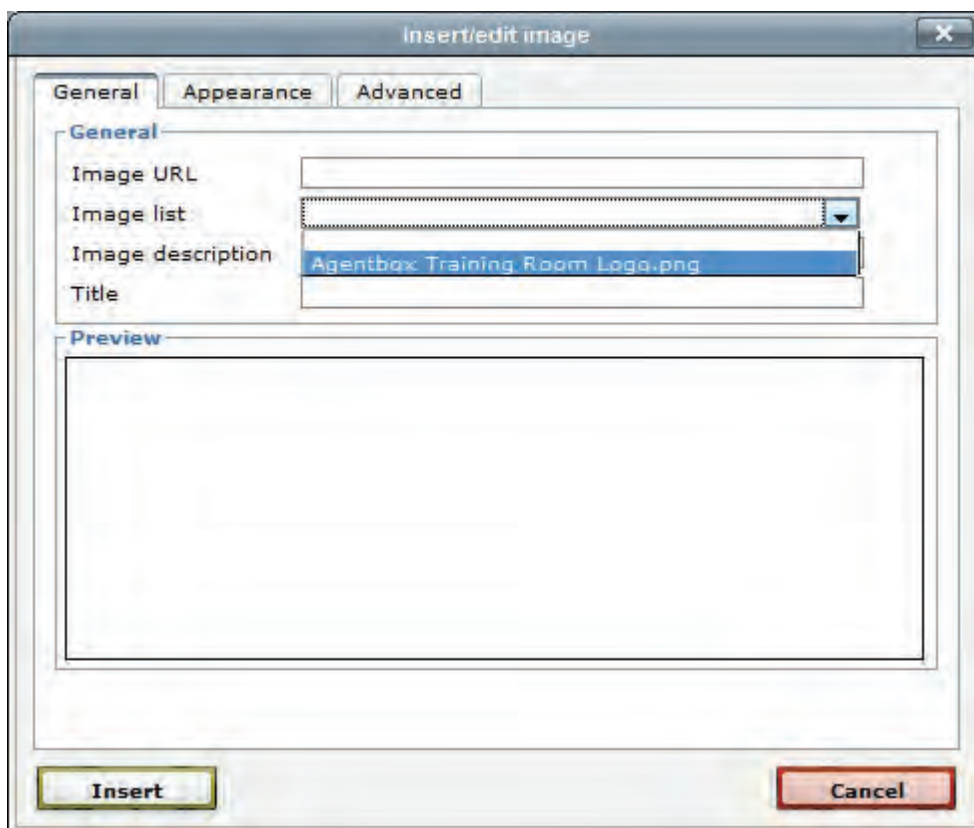
B I U Paragraph



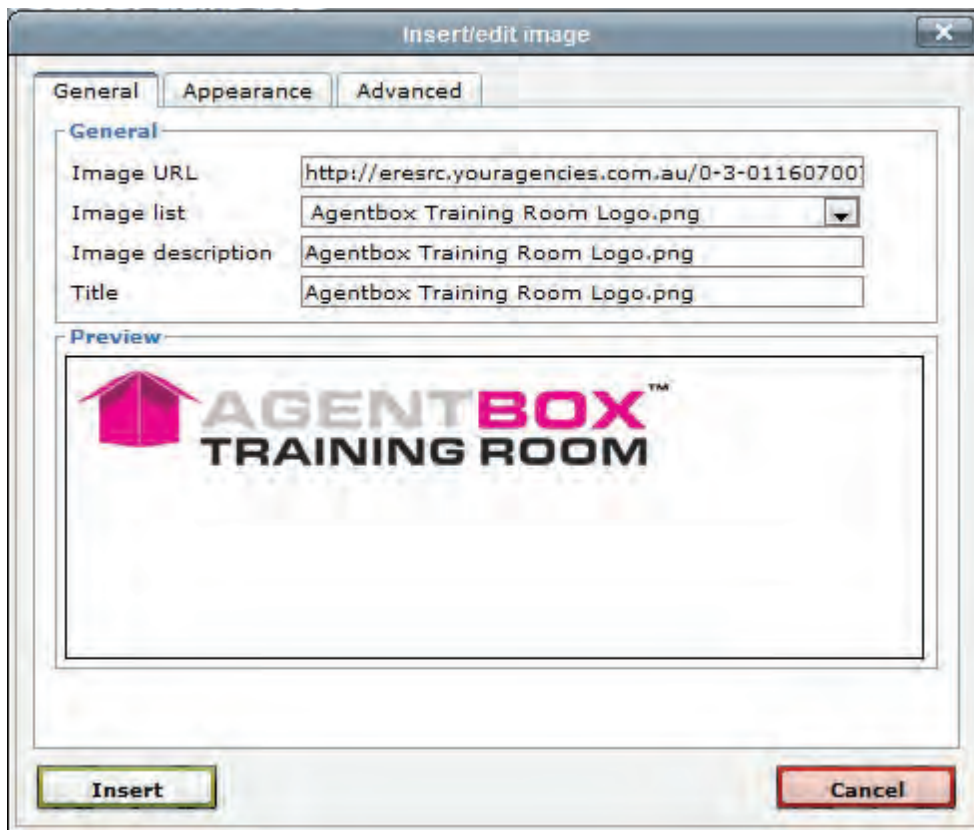
Save



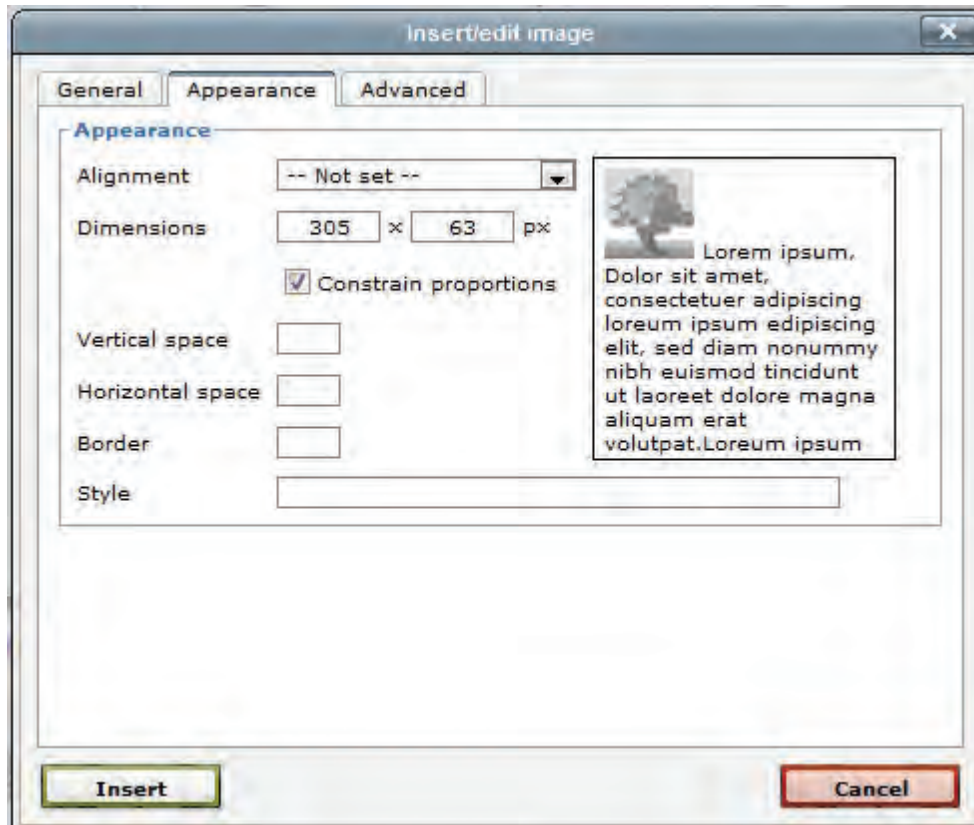
7. Select the image from the image list drop down.



8. Image will appear in window.



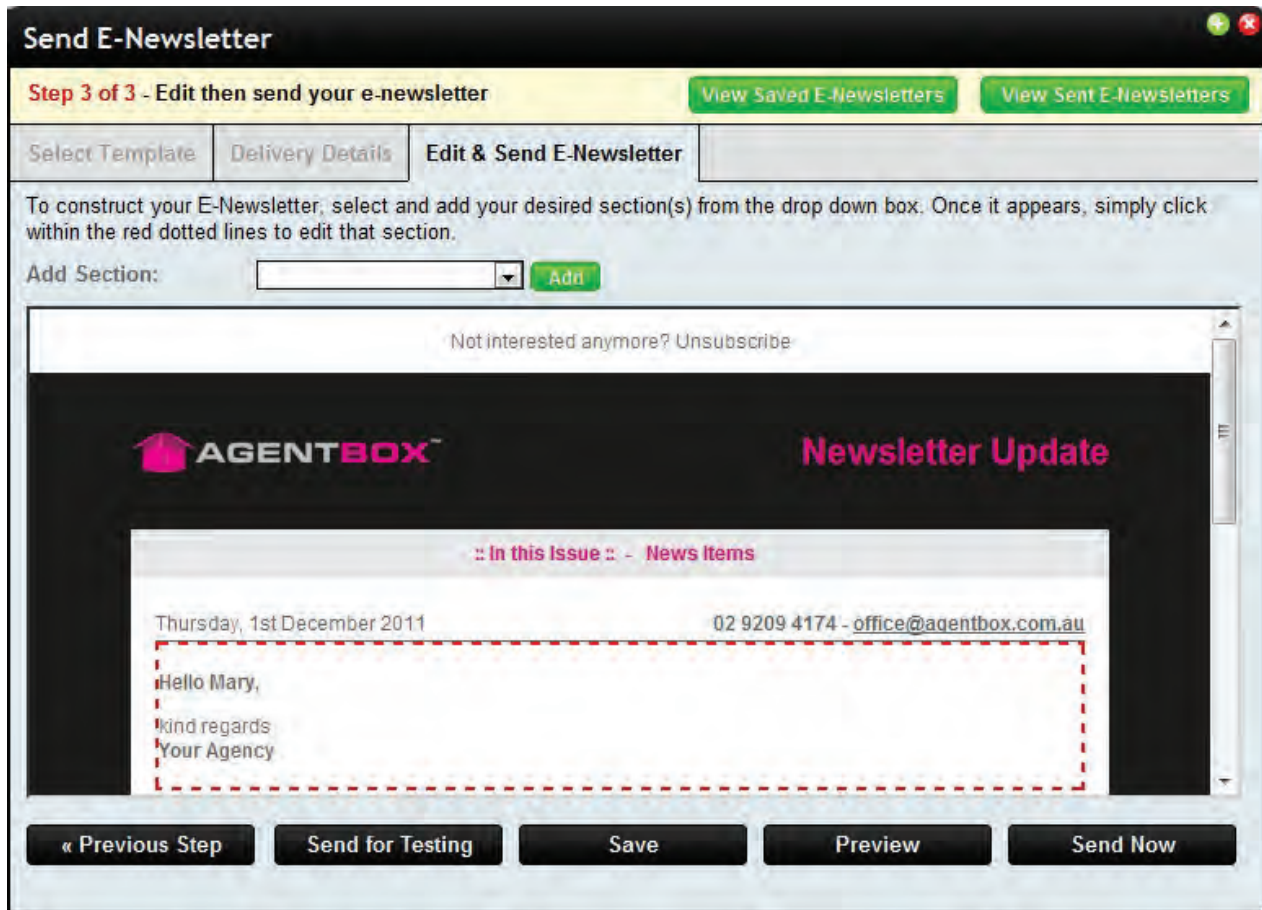
9. You can edit the positioning and dimensions of the image in the Appearance tab.



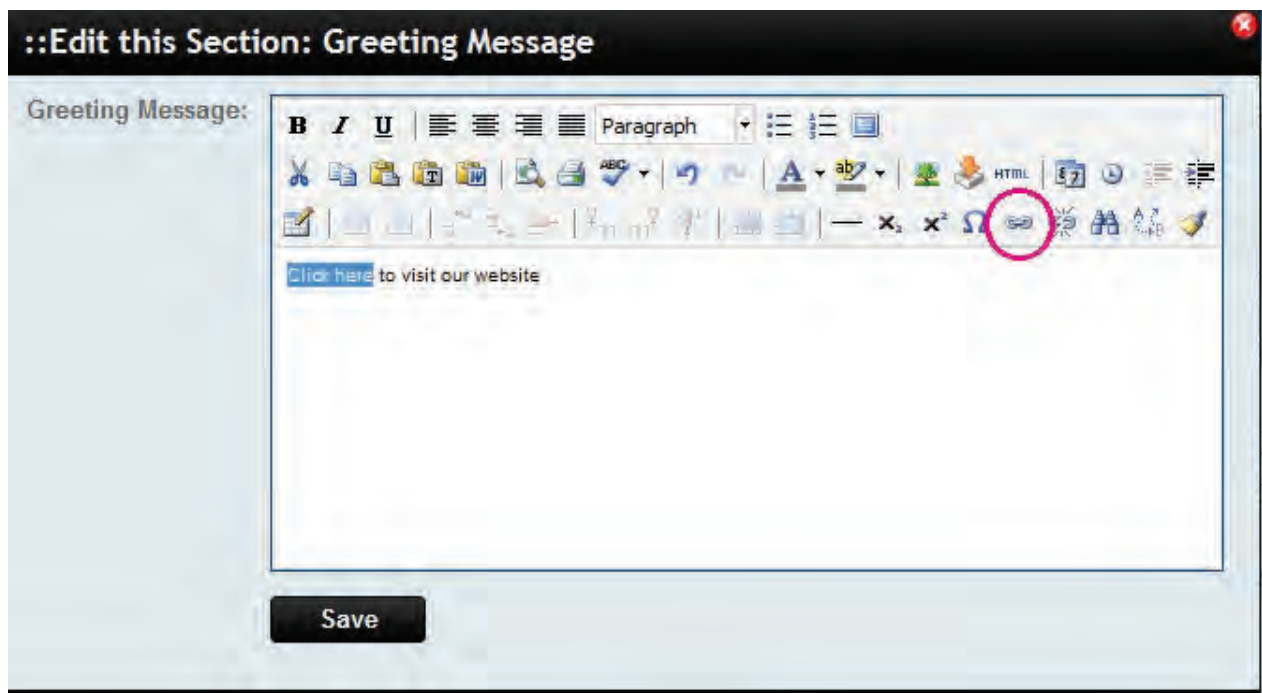
10. Click insert

Links can be used to direct contacts to view a variety of things, in particular other websites or to documents and images. The following examples will cover inserting a link to a website.

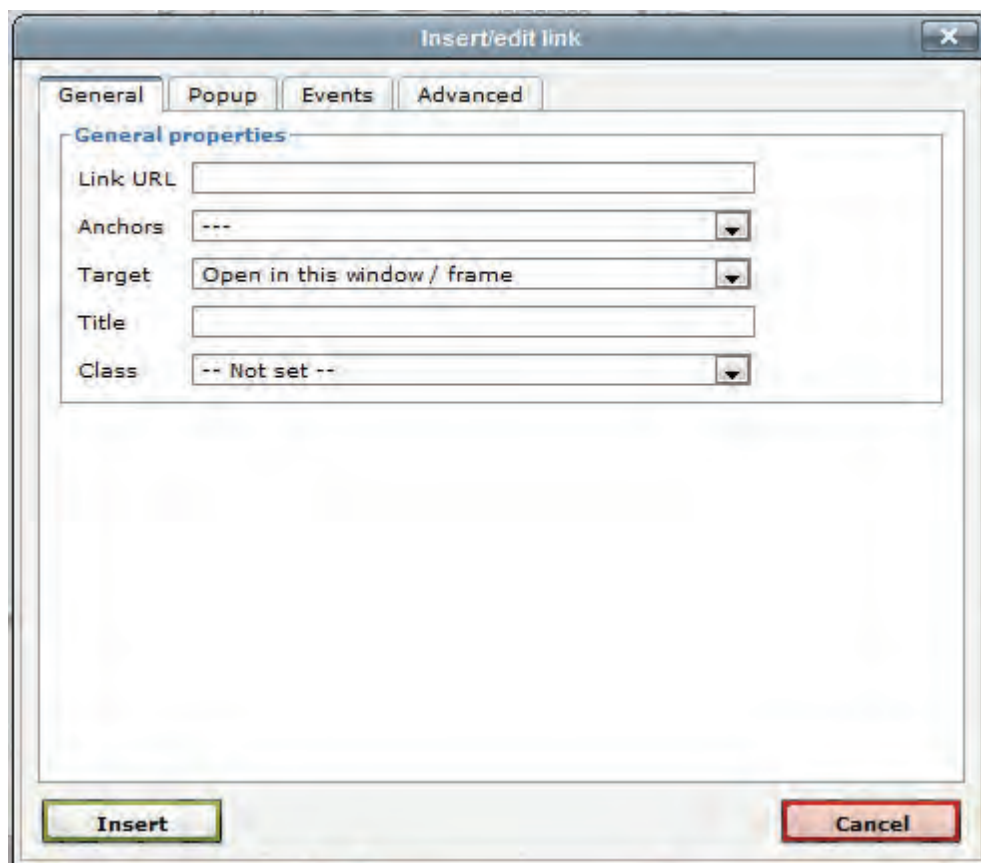
1. Open an E-Newsletter Template.
2. Click within the red dotted box to edit an existing section or add a new E-Newsletter section from the Add Section drop down.



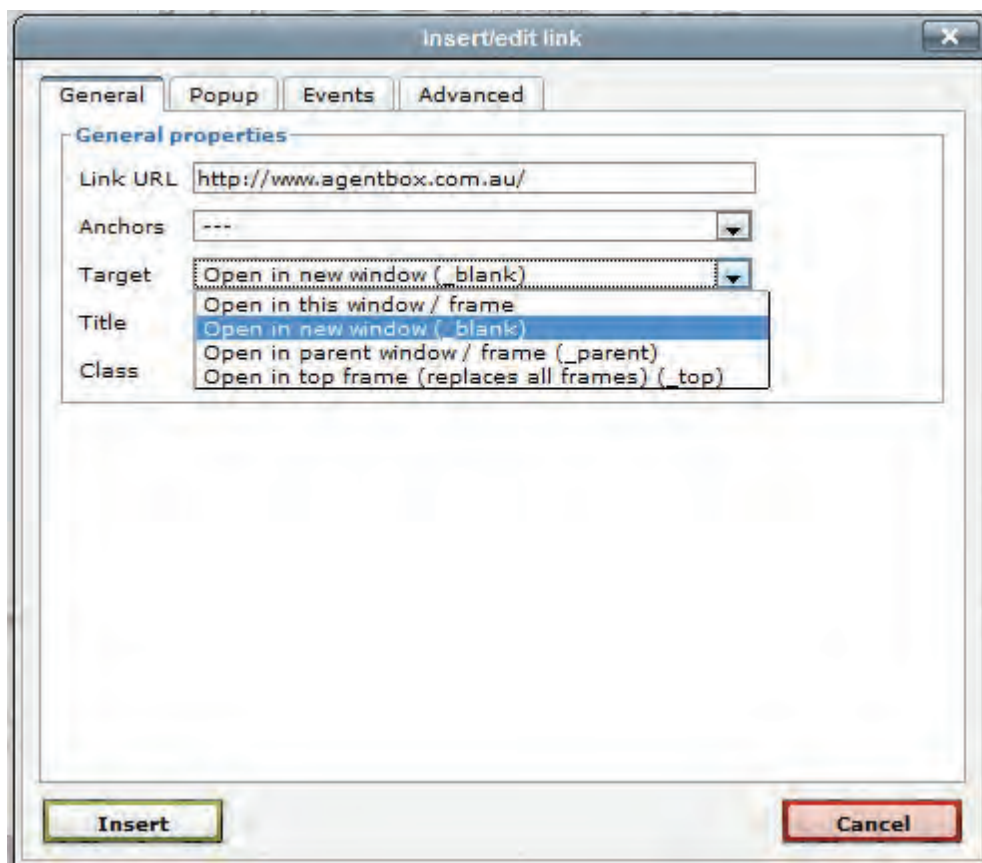
3. Type the text you would like to link, then highlight to select the text



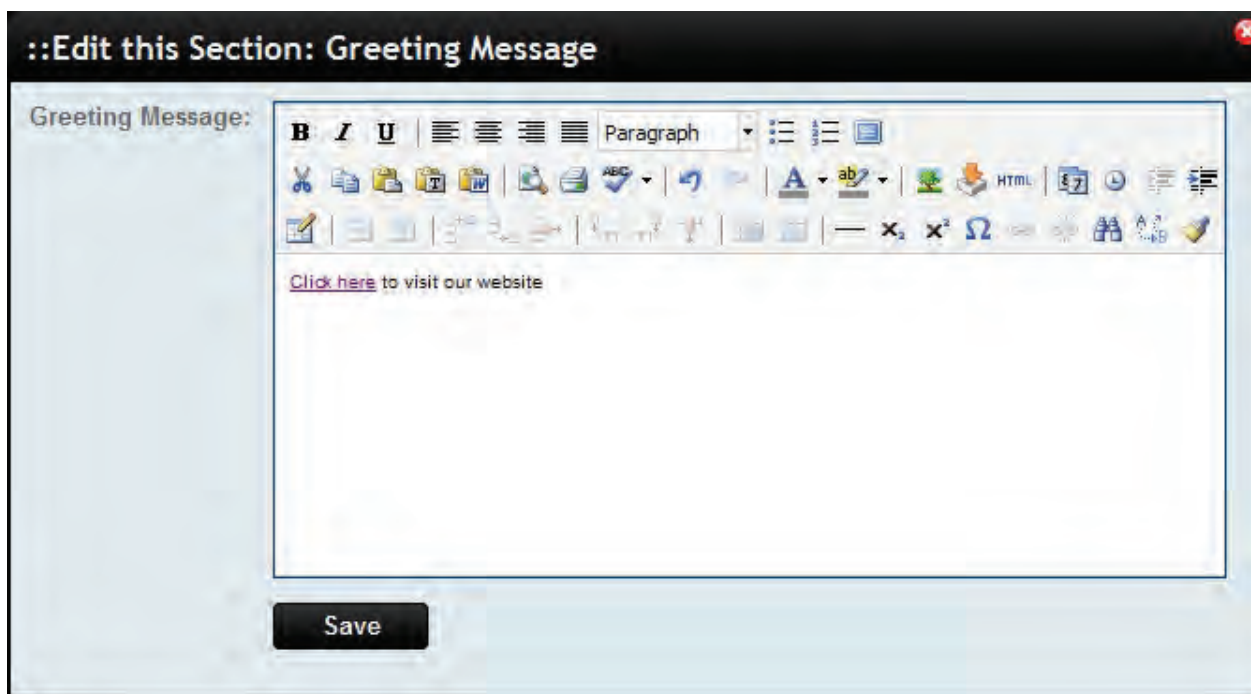
3. Click on the insert link icon 



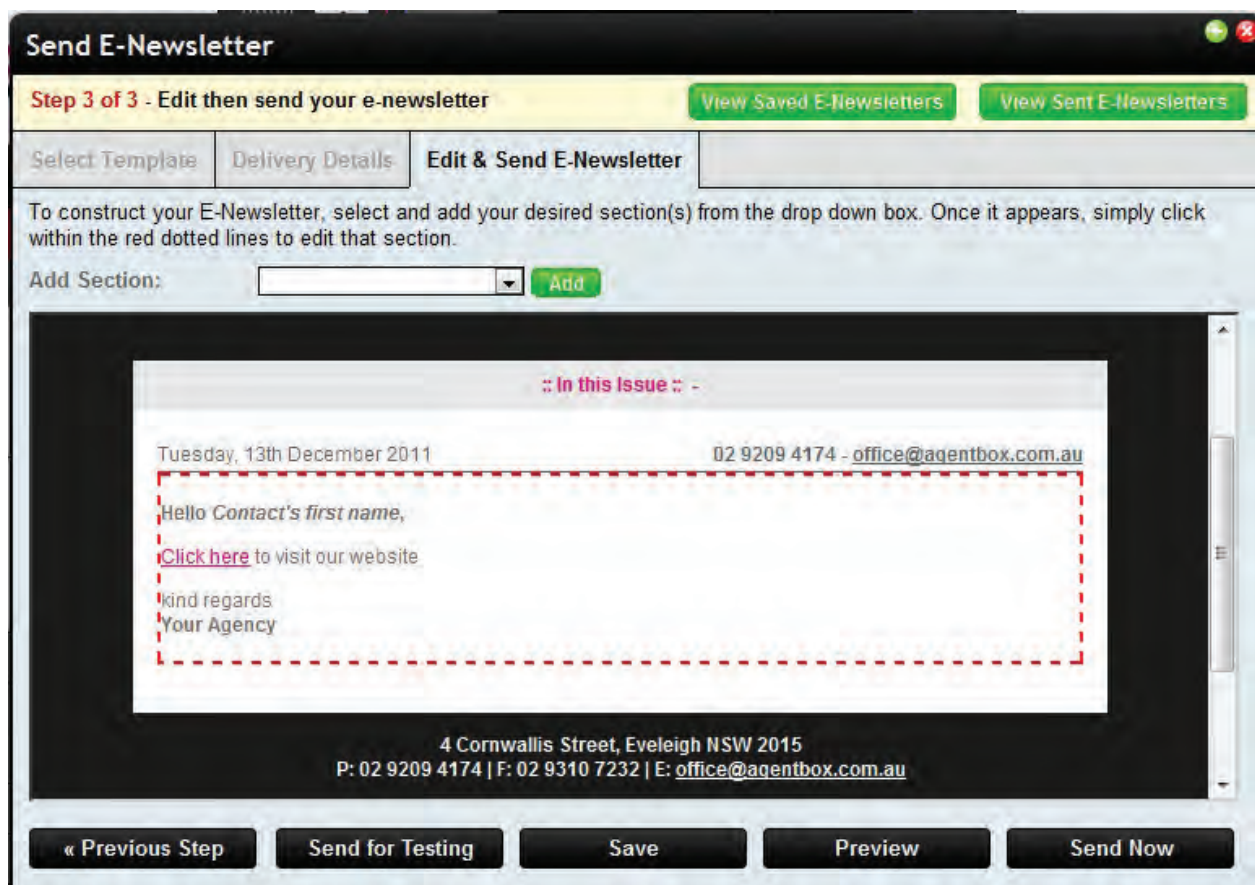
4. Enter the link in the Link URL box, and select the target we recommend 'Open in New Window'



5. The text will now be linked. Click Save



6. You can test this link by clicking the Preview button **Preview** before sending.
** Note: please only preview if you have selected 'Open in New Window' as the target in step 4.*



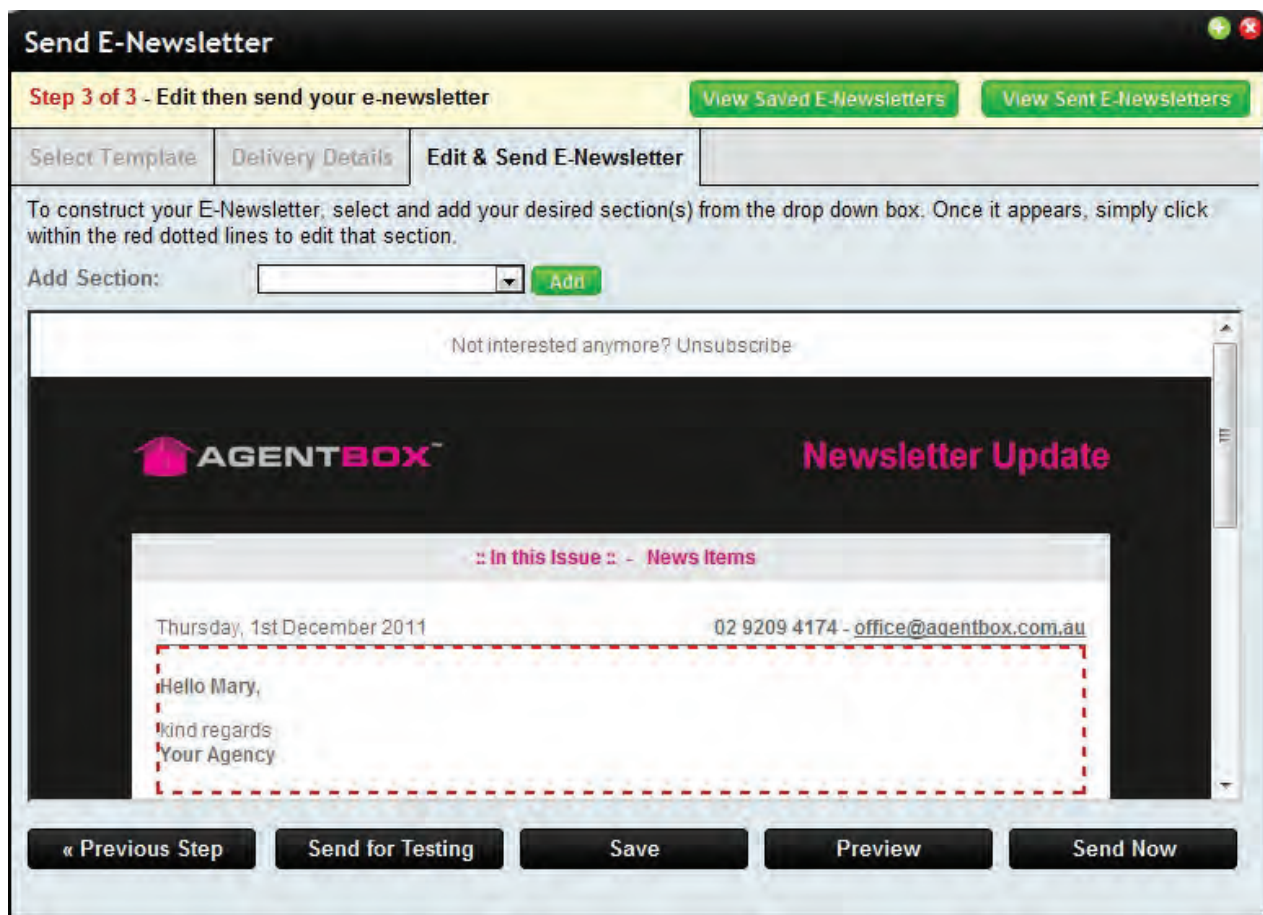
7. You can now send the E-Newsletter by selecting Send Now.

Attach file to E-Newsletter

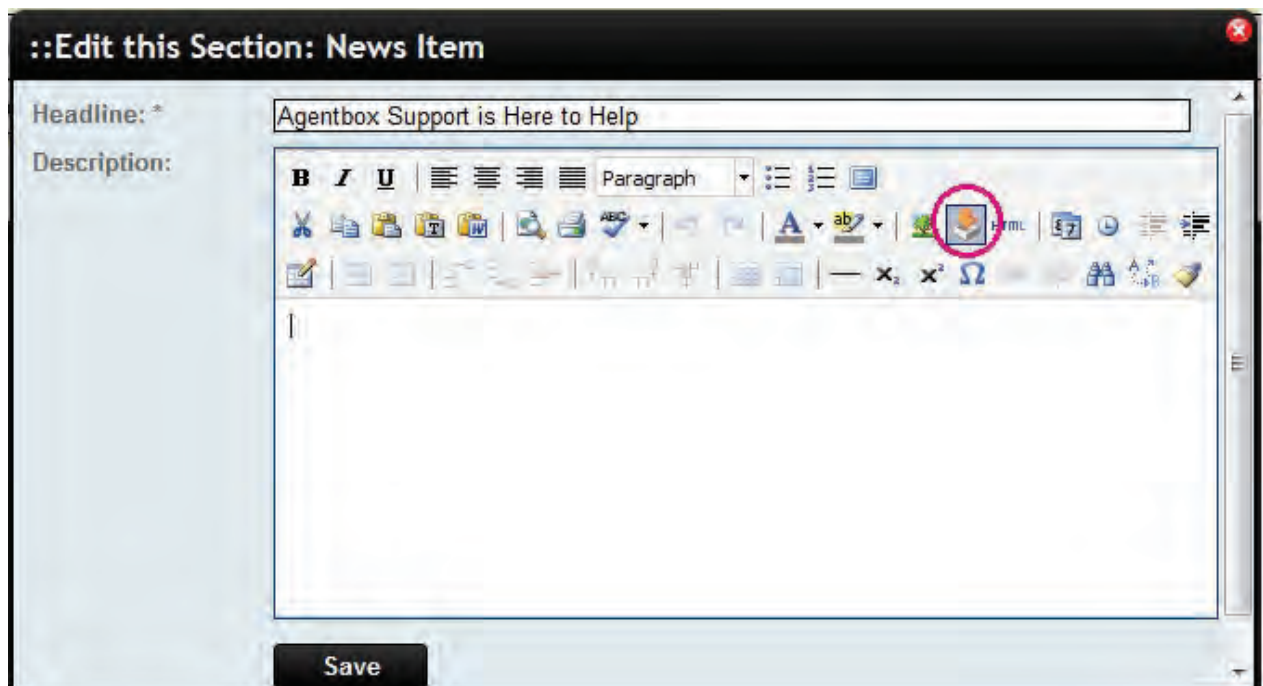
How do I attach a file to an E-Newsletter?

You are not able to attach a file to an E-Newsletter in Agentbox. You can however upload a file and then create a link to the file e.g. [Click here to download our Market Update.](#)

1. Open an E-Newsletter Template.
2. Click within the red dotted box to edit an existing section or add a new E-Newsletter section from the Add Section drop down.



3. Click on the Custom Upload icon 



Click the 'Browse Files' button to go and select the files you wish to upload from your local computer. Then select 'Upload' to confirm the files to publish.



:: File(s) Upload ::

Browse Files

Overall progress

0%

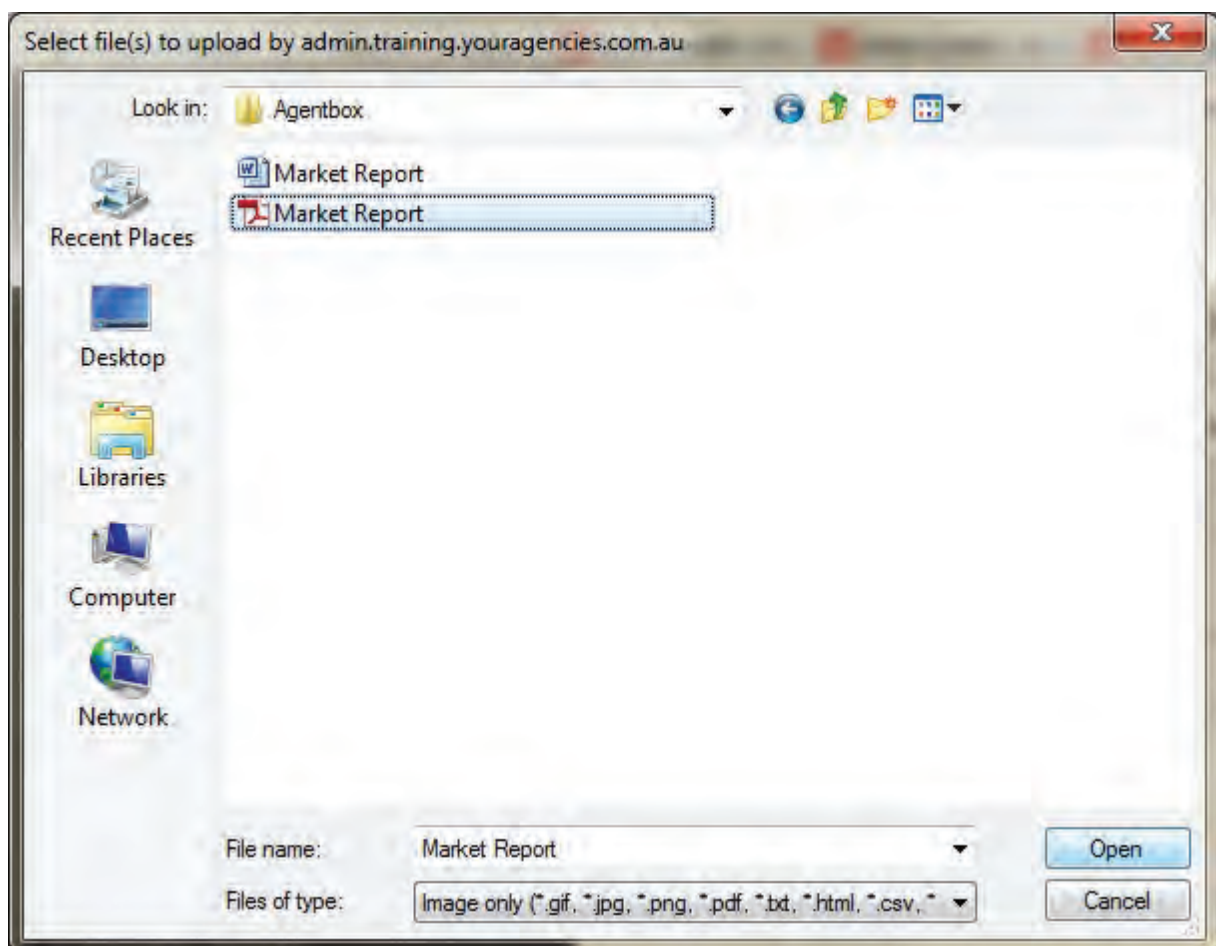
File Progress

0%

Clear List **Upload**

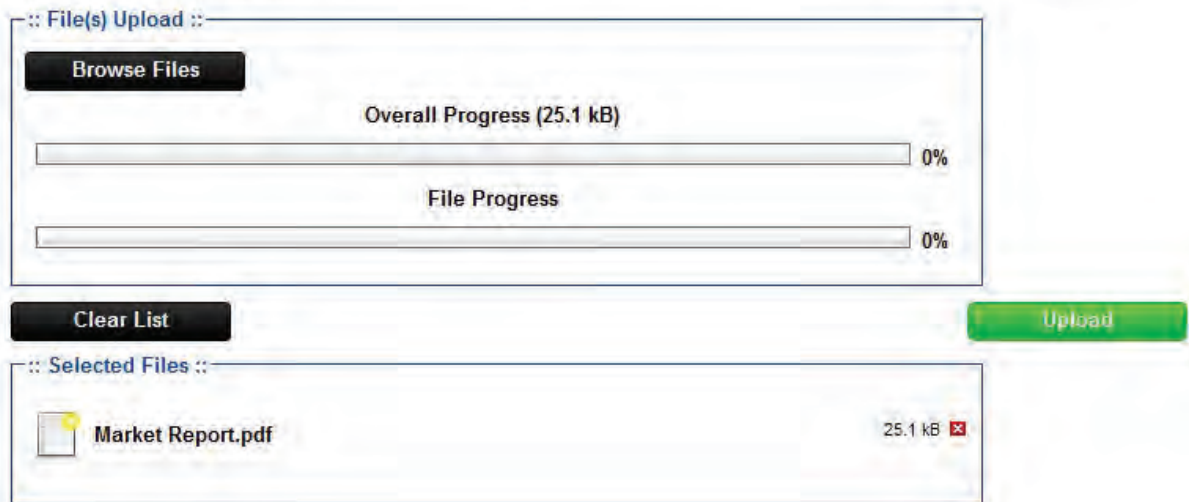
:: Selected Files ::

4. Select Browse and select the image you want to upload and click Open.



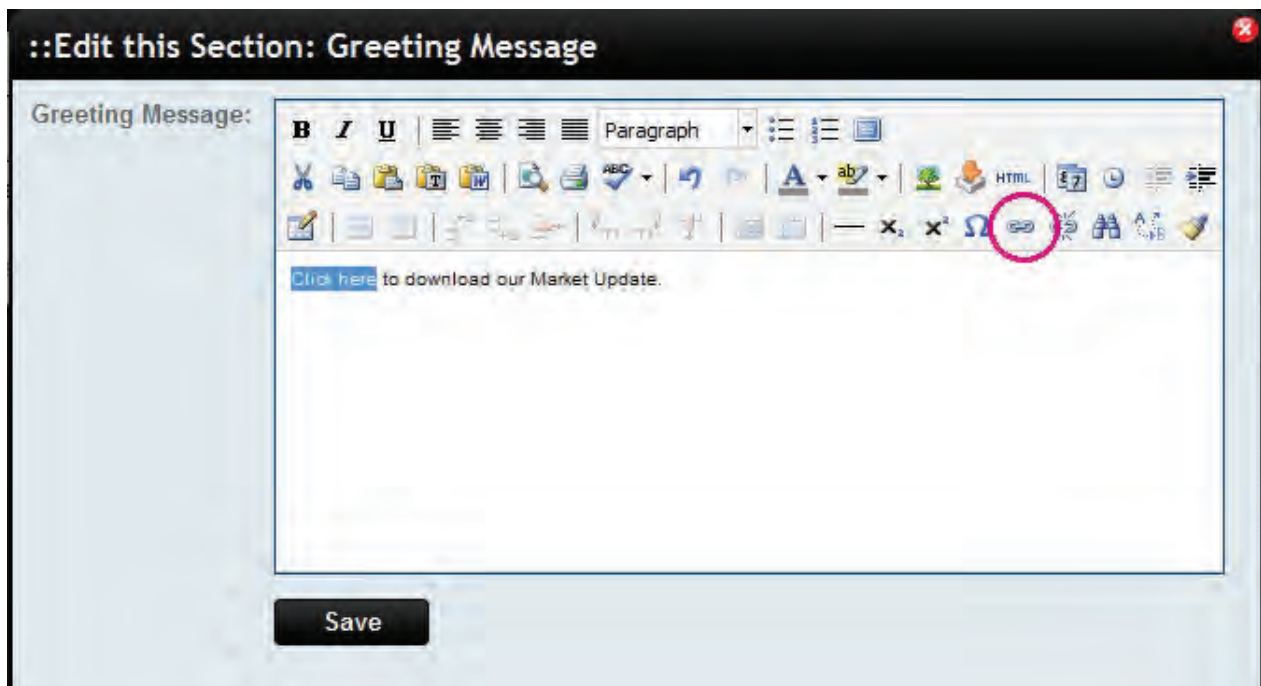
5. Click Upload

Click the 'Browse Files' button to go and select the files you wish to upload from your local computer. Then select 'Upload' to confirm the files to publish.




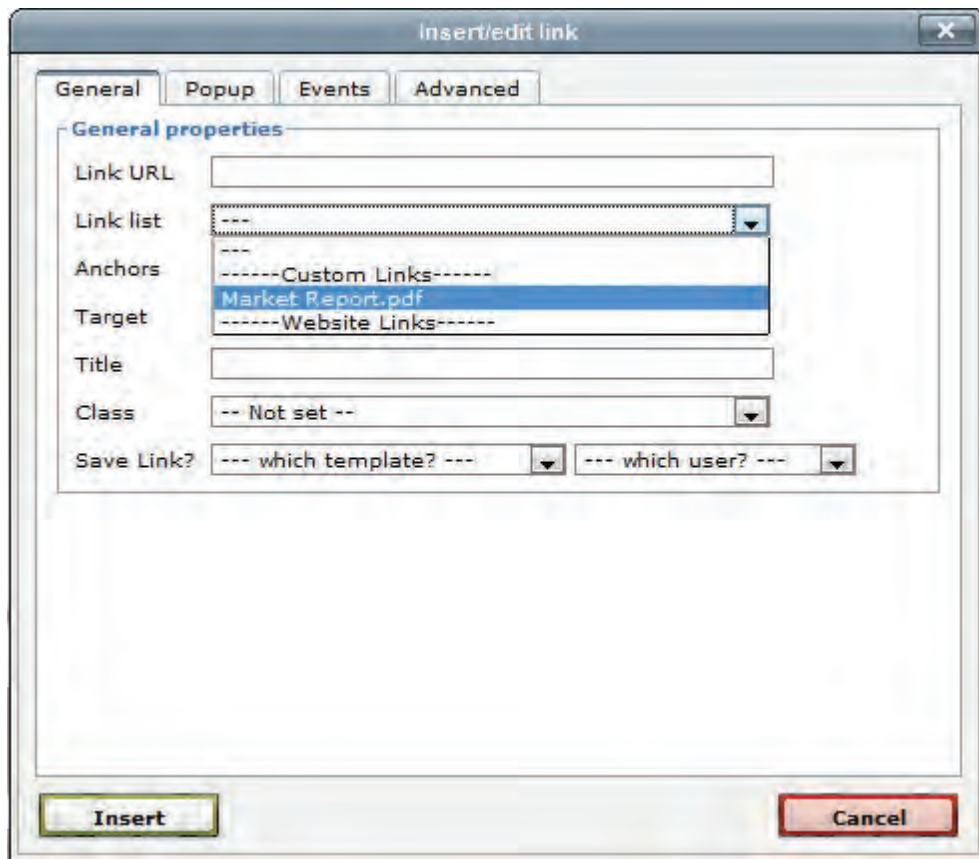
The image shows a file upload interface. At the top, there is a 'Browse Files' button. Below it, there are two progress bars: 'Overall Progress (25.1 kB)' and 'File Progress', both showing 0%. Below the progress bars, there is a 'Clear List' button and an 'Upload' button. At the bottom, there is a 'Selected Files' section containing one file: 'Market Report.pdf' with a size of 25.1 kB and a close icon.

6. Type the text you would like to link, then highlight to select the text

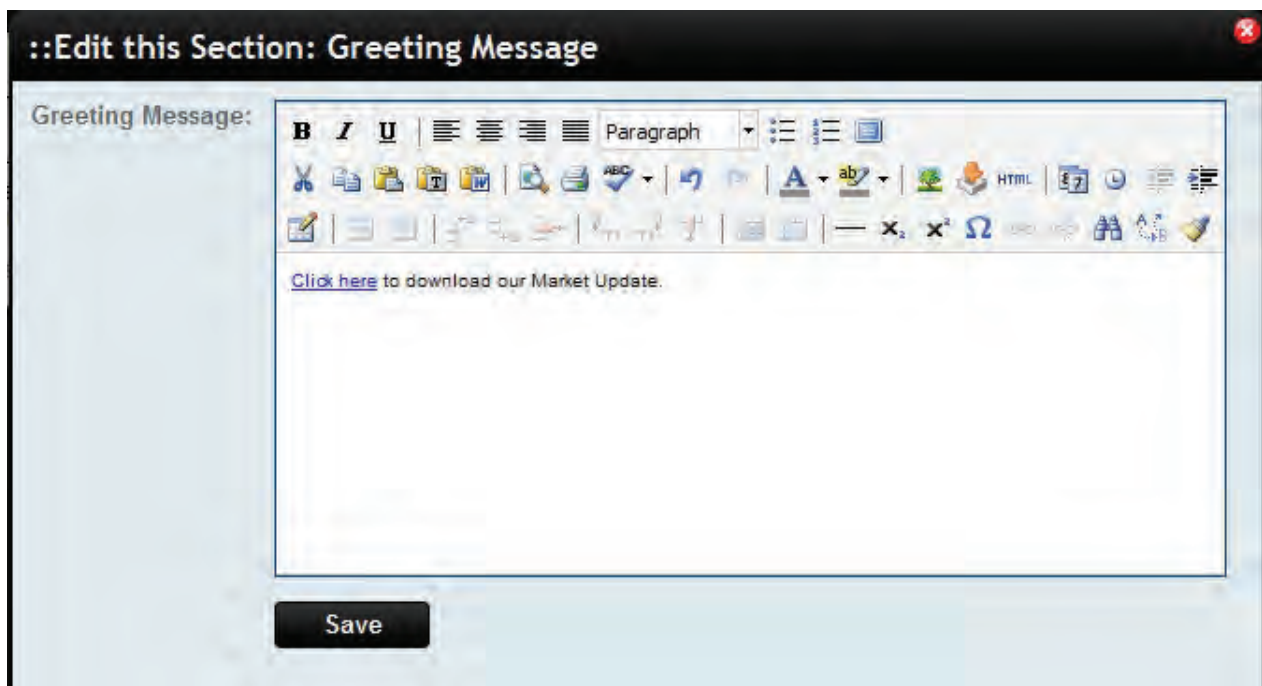


The image shows a text editor interface for 'Greeting Message'. The text 'Click here to download our Market Update.' is highlighted. The toolbar includes various formatting options, and the 'Insert Link' icon (a chain link) is circled in red. A 'Save' button is located at the bottom.

7. Click on the insert link icon  and select the file from the Link List Drop Down and and select the target we recommend 'Open in New Window'



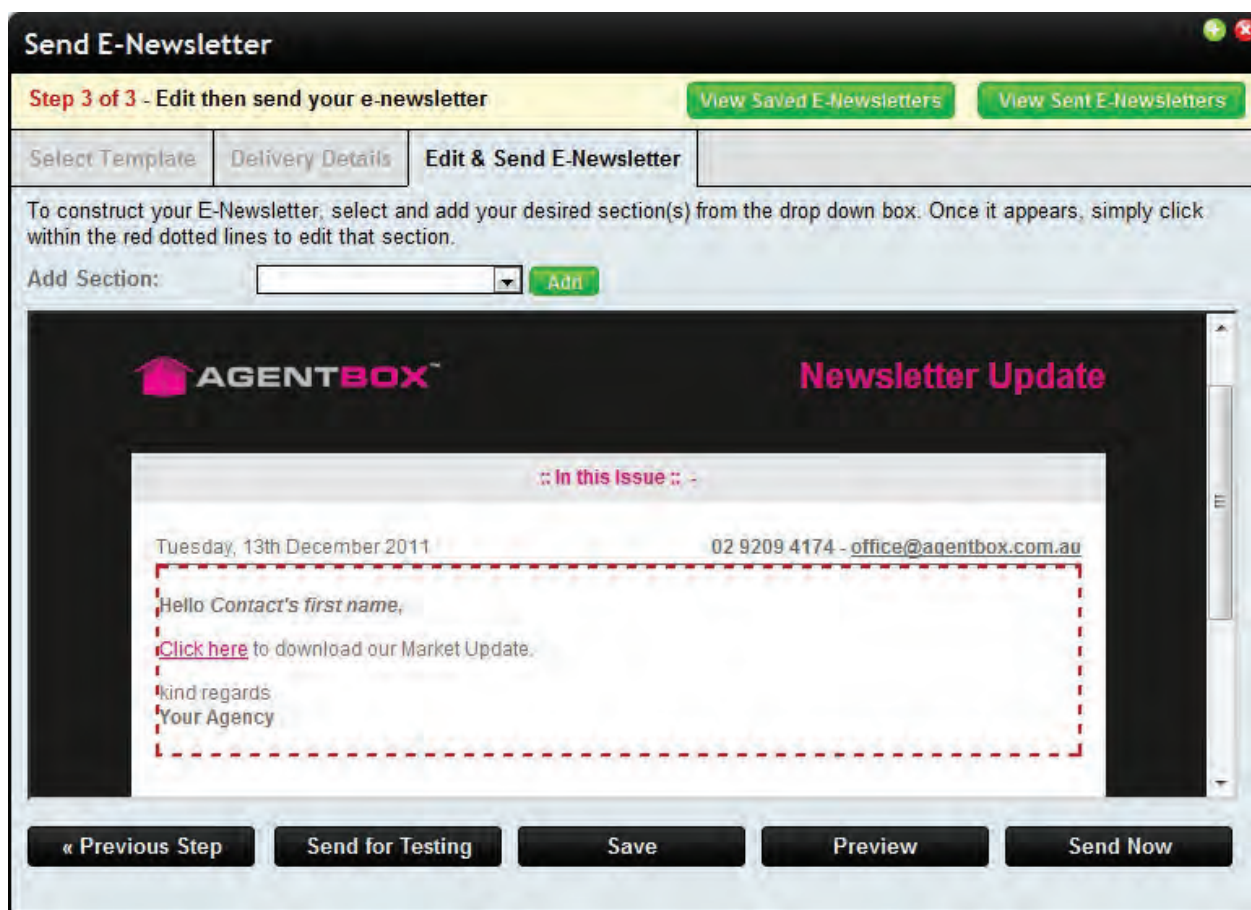
8. Click insert



9. Click Save

You can test this link by clicking the Preview button  before sending.

** Note: please only preview if you have selected 'Open in New Window' as the target in step 7.*



10. You can now send the E-Newsletter by selecting Send Now.

Changing a property Status

Changing a property status

Regarding a property status, Agentbox is limited to what can be sent to the various portals. The status flow in Agentbox works as follows and it is important for both reporting and advertising that you update the data correctly.

Available: Property advertised on your website and portals as **current/available**

Under Contract: Property advertised on your website and portals as **'under contract'**

Exchanged - Conditional: Property advertised on your website and portals as **current/available**

Exchanged - Unconditional: Property advertised on your website and portals as **SOLD** [Sold Date = Contract Date]

Settled: Property remains advertised on your website and portals as **SOLD** [Sold Date = Contract Date]

Detailed Property Status Information

Status	Sub Status	For Sale/ For Lease	Meaning
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Prospect	n/a	any	Property is a potential listing for your office
Appraisal	n/a	any	Property is being Appraised by your office
Listing Presentation	n/a	any	Property is being Appraised by your office and Presentation has been completed
Offline	Not Ready For Public Display	any	Property is listed with your office but not ready to be advertised
	Withdrawn	any	Property was listed with your office but the vendor has withdrawn before any successful sale
	Sold, Not for Public Display	any	Listing has been sold/leased and should longer be advertised
	Sold By Another Agent	any	Listing was sold/leased by another agency and should no longer be advertised
	Archived	any	Property will not show in any reports and will not be advertised (use if a property has been entered into the system in error)
	Auction Passed In/Cancelled	For Sale Only	Listing was unsuccessful at Auction and also did not sell after Auction. Vendor has withdrawn
	Appraisal Missed	any	Property was Appraised by your office but the Vendor went with another agency
	Appraisal Cancelled	any	Property was Appraised by your office but the Vendor decided not to sell
Available	n/a	any	Listing is currently on the market / being advertised by your office
Leased	n/a	For Lease Only	Listing has been leased
Under Contract / Exchanged	conditional	For Sale Only	Contracts have been signed / exchanged but are awaiting conditions to be fulfilled / cool off to expire
	unconditional	For Sale Only	Contracts have been signed / exchanged and all conditions have been met - the listing is sold, awaiting settlement

Settled	n/a	For Sale Only	The sale has settled	disp pag con ban web
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My Log In Isn't Working

My log in isn't working!

1. Click on Forgot Password on the log in page.
2. Enter your login email address
3. Click "Submit"



4. A temporary password will be emailed to your email address

**Note: To activate the new password you must go through the log in link in the email.*

5. Once you have successfully logged in follow the steps under [Change Password](#) to help change your password.

Can't View Agentbox or Website

I can't view the log in page or my website but I can view all other websites.

Please contact Agentbox Support with this issue on 9209 4174 or support@agentbox.com.au ASAP

Can't Make Property Available

Why can't I make a property Available?

1. A property can only be changed to 'Available' if it is Offline.
2. A property can only be changed to 'Available' if the user has the permission to "Publish Listings Live" (please contact your master user)
3. A property cannot be made Available unless the correct documents have been uploaded. This is a safety measure to ensure you are legally protected.

**Note: necessary documents will differ according to state.*

3a. To upload these documents go to the Documents sub tab under the Resources tab in a Property Card.

:: Listing : #1P0008 - 654 Victoria Street, Sydney

Full View

General For Sale Features OFI Agents & Contacts **Resources** Commission

Property Photos | Floorplans | **Documents** | Links

:: Agency Agreement * ::

Agreement Upload Please ensure that a document does not exceed **5MB** in filesize.

:: Property Contract * ::

Contract Upload Please ensure that a document does not exceed **5MB** in filesize.

:: Sustainability Declaration ::

Declaration Upload Please ensure that a document does not exceed **5MB** in filesize.

:: Other Documents ::

Document(s) Upload Please ensure that a document does not exceed **5MB** in filesize.

Save

Duplicate Property

Why is Agentbox saying the property I am entering is a duplicate?

1. Agentbox has recognised that there is an existing live record of this property in the database.
2. Only one Live (e.g. Available, Sold, Leased etc) can exist at one time. For two properties with the

same address to coexist in your database one must be changed to Offline.

Contact CSV Download

How do I download a CSV file of my Contacts?

1. Ensure that you have the correct access permissions to download CSV files. To view your permissions go to the Access tab in your staff card. If you are not a Master user you must ask a Master to check for you. If you do not see the permission Download CSV, please contact another Master User.

2. Click on the Contacts icon from the main menu



3. Using the Advanced Search tool, search for the contacts you would like you download.

:: Advanced Contact Search : New Search

New Search Saved Searches

:: Contact Search ::

First Name: Last Name:

Home Phone: Mobile:

Email: Company:

Address: Suburb:

Custom Filters: [edit](#) [Have Email](#)

Subscribe To:

- Auction Reminders
- Newsletters
- OFI Times
- Property Updates
- Sales Results

:: Group Search ::

Sale/Rental:

Region:

Search

:: Advanced Contact Search : Search Results(6 contacts found)

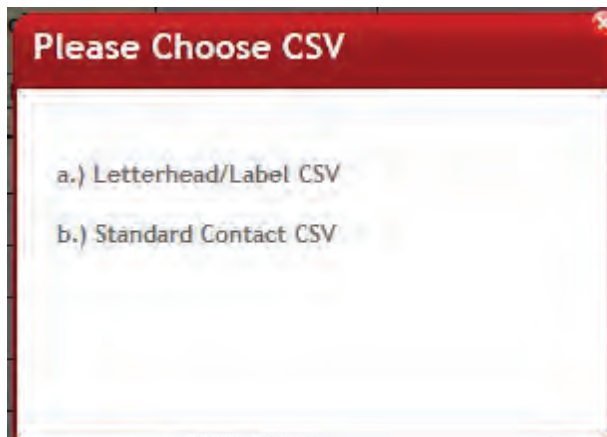
New Search Search Results Refine Search Saved Searches

Sort By: Contact Name: A-Z

Contact	Assigned Staff	Last Contacted	Contact Info
Gary Brown	John Smith		@
Michael Johnson	John Smith	02/11/11	@
Sam Jones	John Smith		@
Samantha Jones	John Smith	10/11/11	@
Mary May	John Smith	11/11/11	@
Charles Roberts	John Smith		@

4. Hit the Download CSV action icon 

5. Select to download either a Letter head/Label CSV or a Standard Contact CSV



The Letter head/Label CSV contains the contacts salutation and their letter head in another column.

**Note: The Letter head by default will Address the Custom Letter head entered (if one exists), else Title, First Name, Last Name, Company Name and postal address (if one exists), else Title, First Name, Last Name, Company Name and residential address.*

	A	B	C
1	Salutation	Letter Head	
2	Miss Mary May	Miss Mary May 1 Miles Road Camperdown NSW 2050	
3	Mr Michael Johnson	Mr Michael Jones PO Box 456 Sydney NSW 2000	
4	Mr Sam Jones	Mr Sam Jones Sj Photography 72 Monash Road Sydney NSW 2000	
5	Sammy	Miss Samantha Jones 7 Smith Street Sydney NSW 2000	

The standard contact CSV contains the contacts Title, First Name, Last Name, Preferred Name, Email, Mobile, Phone, Work Phone, Company, Address, Suburb, State, Postcode, Letter head, Assigned Staff and contact classes.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q
1	Title	First name	Last Name	Preferred Name	Email	Mobile	Phone	Work Phone	Company	Address	Suburb	State	Postcode	Letter Head	Assigned Staff	Contact Class	
2	Miss	Mary	May	Miss Mary May	mm@hotmail	0411 222 555	02 9209 4174	02 9523 5642		1 Miles Road	Camperdown	NSW	2050	Miss	Jane Smith	Buyer;Vendor;Devel	
3	Mr	Michael	Johnson	Mr Michael Johnson	mick@gmail	0411 222 333	02 9564 2533			5 Miles Road	Sydney	NSW	2000	Mr	Jane Smith	Buyer;Vendor	
4	Mr	Sam	Jones	Mr Sam Jones	sam@hotmail	0452 333 666	02 9854 6596		Sj Photogra	72 Monash Roa	Sydney	NSW	2000	Mr Sam	Jane Smith	Buyer;Supplier;Hot B	
5	Miss	Samantha	Jones	Sammy	samantha@r	0425 135 698	02 9856 4523			7 Smith Street	Sydney	NSW	2000	Miss	Jane Smith	Buyer;Vendor;Hot Bu	
6	Mr	Thomas	Train	Mr Thomas Train	tt@hotmail	0452 333 653			Signboards	52 Elizabeth Str	Surry Hills	NSW	2010	Mr	Jane Smith	Vendor;Owner Occu	
7	Mr	Gary	Brown	Mr Gary Brown	gary.brown@	0456 231 528				17 Tranmere St	Gosford	NSW	2250	Mr Gary	Jane Smith	Buyer;Vendor;Purch	

6. Click to download and save the CSV file.



**Note: Each CSV file has a limit of 1000 contacts (this may differ depending on your office set up). If a greater list is required please contact Agentbox Support on 02 9209 4174 or support@agentbox.com.au.*

Set Up SMS Tool

How do I set up the SMS tool and how do I allocate credits to staff?

Set-Up

1. Contact Agentbox Support on 02 9209 4174 or support@agentbox.com.au with your SMS Setup

request.

Allocation

1. Once the SMS feature has been successfully setup in your system Support will contact you to guide you through getting started.
2. One staff member must be set up by Agentbox Support in order to allocate credits to other staff members.

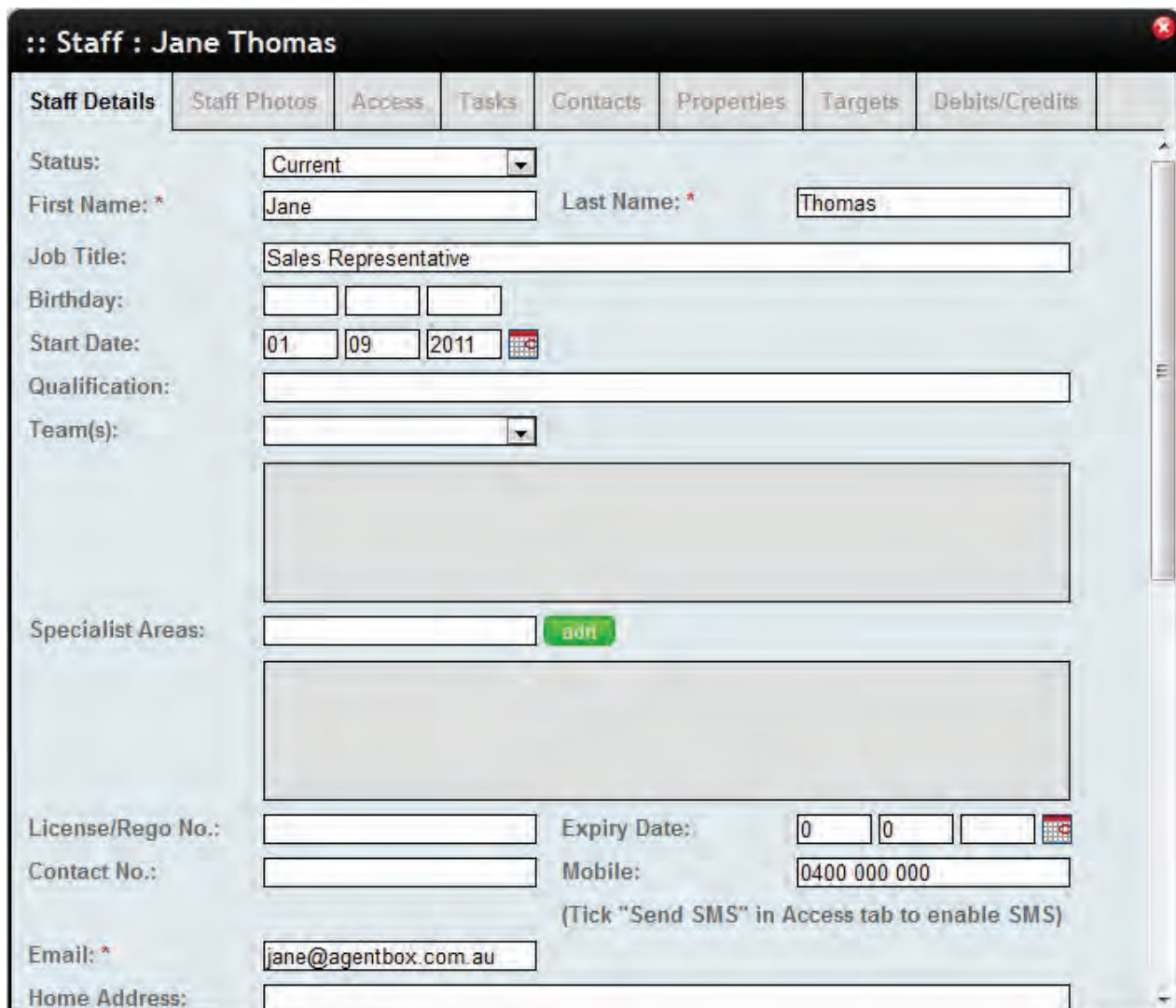
To allocate credits to other staff members follow the instructions under [Distribute SMS Access](#)

Distribute SMS Access

Allocate SMS Access to Fellow Staff Members

**Note: Master users can only allocate access to fellow staff members if they have SMS access.*

1. Search for the staff member and open their staff card.
2. Enter a mobile number on the General tab



The screenshot shows a web application interface for managing staff members. The title bar reads ":: Staff : Jane Thomas". Below the title bar is a tabbed interface with the following tabs: Staff Details (selected), Staff Photos, Access, Tasks, Contacts, Properties, Targets, and Debits/Credits. The form contains the following fields and values:

- Status: Current (dropdown)
- First Name: * Jane
- Last Name: * Thomas
- Job Title: Sales Representative
- Birth day: [] [] []
- Start Date: 01 / 09 / 2011 (calendar icon)
- Qualification: []
- Team(s): [] (dropdown)
- Specialist Areas: [] (with a green "add" button)
- License/Rego No.: []
- Expiry Date: 0 / 0 / [] (calendar icon)
- Contact No.: []
- Mobile: 0400 000 000
- Email: * jane@agentbox.com.au
- Home Address: []

Below the Mobile field, there is a note: "(Tick 'Send SMS' in Access tab to enable SMS)".

3. Click Save
4. Go to the Access tab
5. Tick the SMS Access Permission check box

:: Staff : Jane Thomas

Staff Details | Staff Photos | **Access** | Tasks | Contacts | Properties | Targets | Debts/Credits

Permission Level: Sales Manager

Password:

:: Permissions ::

Permission To:

<input checked="" type="checkbox"/> Access Account History	<input checked="" type="checkbox"/> Create New Property
<input checked="" type="checkbox"/> Access Bulk Upload Facility	<input type="checkbox"/> Download Contact CSV
<input checked="" type="checkbox"/> Access Marketing Fund	<input checked="" type="checkbox"/> Edit a Contact
<input checked="" type="checkbox"/> Add a Meeting	<input checked="" type="checkbox"/> Edit a Property
<input checked="" type="checkbox"/> Add a Note	<input type="checkbox"/> Edit All Contacts
<input checked="" type="checkbox"/> Add a Task	<input type="checkbox"/> Edit All Properties
<input checked="" type="checkbox"/> Archive a Contact	<input checked="" type="checkbox"/> Search & View All Contacts
<input checked="" type="checkbox"/> Archive a Property	<input checked="" type="checkbox"/> Send E-Newsletters
<input checked="" type="checkbox"/> Can publish Listings live	<input type="checkbox"/> Send SMS
<input checked="" type="checkbox"/> Create a Contact	<input checked="" type="checkbox"/> Share Contacts
<input checked="" type="checkbox"/> Create and View Reports	
<input type="checkbox"/> Create Media	

6. A pop-up will appear and an SMS will be sent to the mobile number entered with a code
7. Enter the code in the pop-up

Registering SMS Account

An SMS message has been sent to 0400 000 000,
Please enter the password in the SMS to register this mobile number to enable SMS sending:

Password:*

8. Click Save

9. Go to the Staff Details tab

10. Tick the Enable SMS for this mobile number check box underneath the Mobile number.

:: Staff : Jane Thomas

Staff Details | Staff Photos | Access | Tasks | Contacts | Properties | Targets | Debits/Credits

Status:

First Name: * Last Name: *

Job Title:

BirthDay:

Start Date:

Qualification:

Team(s):

Specialist Areas:

License/Rego No.: Expiry Date:

Contact No.: Mobile:

Enable SMS for this mobile number

Email: *

Home Address:

11. Click Save

12. The staff member now has access to send SMS through Agent box.

Cannot Find Photo

I cannot find my photo file on my computer.

1. Agentbox only supports JPEG files with the extension .jpg
2. Please ensure your photos are saved in this format

Issues Uploading Photos

Why can't I upload photos and/or documents?

**Note: Please ensure you follow the following steps in order listed below.*

1. How big are the files you are trying to upload?

- Photos: max 5MB in file size and the minimum dimensions of that photo are no smaller than 800px wide x 600px high.
- Documents: max 5MB in file size

2. Is there an error message appearing?

- Record the error message and contact Agentbox Support on 02 9209 4174 or support@agentbox.com.au.

3. Do you have adobe flash installed on your computer?

- To check go to Tools
- Click on Add Ons
- Click on Plug Ins
- Search for Shockwave Flash
- If Shockwave Flash is not visible, please go to <http://get.adobe.com/flashplayer/> to download Adobe Flash Player. This program is required for features such as image uploads.

4. Where is the file located?

- If the file is located on an external server this may cause issues.
- Please save the photo onto the desktop to test if this is the cause.

5. Is this happening to anyone else in your office? Are you able to upload the same photos from another computer in your office?

- YES - This may be due to a slow Upload Speed
To check, please follow the instructions below:
 1. Go to www.speedtest.net and press Begin Test.
 2. Once the test is completed you will be shown your average Download and Upload

Speed.

3. Agentbox recommends a minimum Upload speed of 1mb/s.

- NO - Please contact your IT support to investigate why this is only affecting your computer.

**Note: You may experience an issue during an upload. If this occurs simply click on Refresh Here which will take you back to the Property Resources tab.*

6. If you still cannot upload photos please contact Agentbox Support on 02 9209 4174 or support@agentbox.com.au.

**Note: Ensure to explain all the steps you have followed to help Agentbox Support staff resolve your issue quickly.*

Mobile Access

How do I access Agentbox on my iPhone, iPad or Smart phone?

This is accessed via Agentbox Mobi Admin (beta version).

**Note: As this is a beta release, we encourage you to provide feedback. Please direct any feedback and enquiries to mobisupport@agentbox.com.au so that it can be collated and prioritised.*

1. Go to the URL provided e.g. <http://adminmobi.youragency.com.au>
2. Use your normal user name and password to login.



3. If you do not see the login screen, the Mobi Admin may not have been set up for your office. Please contact support@agentbox.com.au to activate this, there are no additional charges.

4. [Click here](#) to download and view the introduction guide.

Unsubscribed, Do Not Contact, Archived

What is the difference between Unsubscribed, Do Not Contact and Archived Contacts?

Unsubscribed

An Unsubscribed Contact is an Active contact that does not wish to receive any marketing material from the Office. They will still appear in all searches however, will not receive any marketing material such as E-Newsletters and Property Updates even if they are ticked as subscribed in the contact card.

Archived

An Archived Contact will not appear in the universal or general searches. Archived contacts can only be viewed by ticking the Archived checkbox when performing an Advanced Contact Search. These contacts will remain in the system, however out of view. To reactivate an Archived Contact, search for the contact, open their contact card and continue to change their status.

Do Not Contact

Contacts marked with the Do Not Contact status do not wish to be contacted by the Office by any means. These contacts can only be viewed when performing an Advanced Contact Search. These contacts will remain in the system, however out of view from the Universal Search Bar. To reactivate an Contact marked with the Do Not Contact status, search for the contact, open their contact card and continue to change their status.

Invalid Contact Email Address

Why is Agentbox telling me my Contact's email address is invalid?

For all new contacts Agentbox performs an email validity test which checks whether the Domain name of the email address exists, for example hotmail.com, bigpond.net or agentbox.com.au. If Agentbox recognises the Domain name is invalid, the contact will not be added unless the email address is correct or a phone number is provided.

REST Professional Integration

REST Professional SETUP

You can set Agentbox up as an advertising portal in REST which will allow you to feed your rental listings straight into Agentbox.

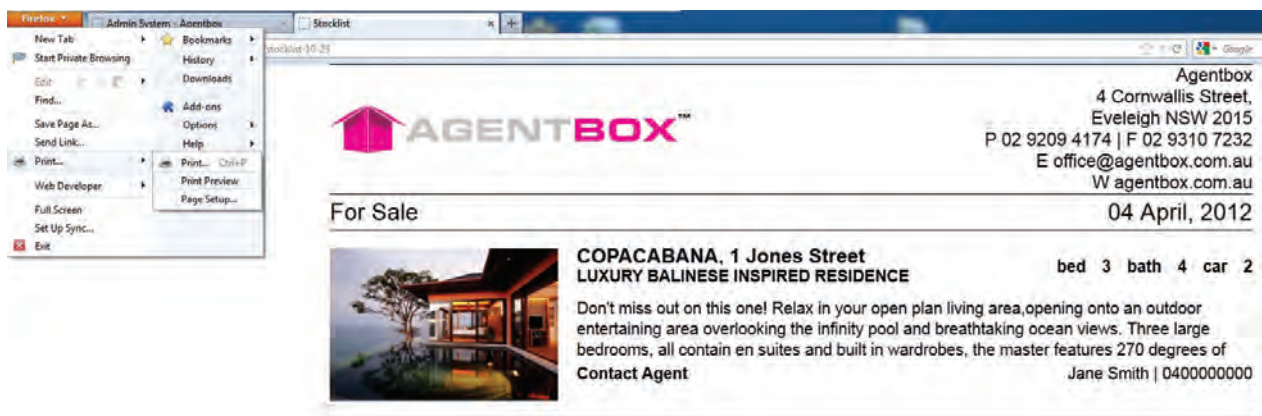
1. Please check your Agentbox agreement for any additional portal charges that may be payable before activating this service.
2. If you wish to proceed we will set up an FTP account and send the details through to you.
3. Contact REST support with these details and advise you would like to set up Agentbox as an advertising portal on your REST account. They will then step you through setting this up (have your FTP account details ready).
4. Once activated in REST, do an initial export to Agentbox of your properties through the REST system and send an email to support@agentbox.com.au to confirm this has been done.
5. We will use the initial data to test the import and if it is ok we will activate the automatic import at our end and confirm by email that your new feed is active.



Print Settings

How do I remove URL details and the footer from the Property Stocklist?


1. Click on File on the top left corner of your Mozilla Firefox browser.
2. Select Print preview



Stocklist - Mozilla Firefox


Print... Page Setup... Page: 1 of 1 Scale: Shrink To Fit Portrait Landscape Close

Stocklist <http://admin.training.youragencies.com.au/pr...> 4/04/2012 12:34 PM



Agentbox
4 Cornwallis Street,
Eveleigh NSW 2015
P 02 9209 4174 | F 02 9310 7232
E office@agentbox.com.au
W agentbox.com.au


For Sale **04 April, 2012**



COPACABANA, 1 Jones Street
LUXURY BALINESE INSPIRED RESIDENCE bed 3 bath 4 car 2

Don't miss out on this one! Relax in your open plan living area, opening onto an outdoor entertaining area overlooking the infinity pool and breathtaking ocean views. Three large bedrooms, all contain en suites and built in wardrobes, the master features 270 degrees of

Contact Agent Jane Smith | 0400000000




COPACABANA, Unit 6/12 Del Rio Drive
OASIS BY THE SEA bed 3 bath 2 car 2

AUCTION | Thu 20/10/2011 1:00pm

Low maintenance living is ensured in this superbly appointed, large 3 bedroom luxury penthouse apartment. Stunning views of Copacabana Beach, ocean and headland are captured from the open plan living area which leads out through the bi-fold doors onto the


Offers over \$960,000 Jane Smith | 0400000000



MANLY, Unit 6/13 Stuart Street
OASIS BY THE SEA bed 2 bath 1 car 2

Low maintenance living is ensured in this superbly appointed, large 3 bedroom luxury penthouse apartment. Stunning views of Copacabana Beach, ocean and headland are captured from the open plan living area which leads out through the bi-fold doors onto the

Offers over \$600,000 Joanne Coughlan | 0403 194 706

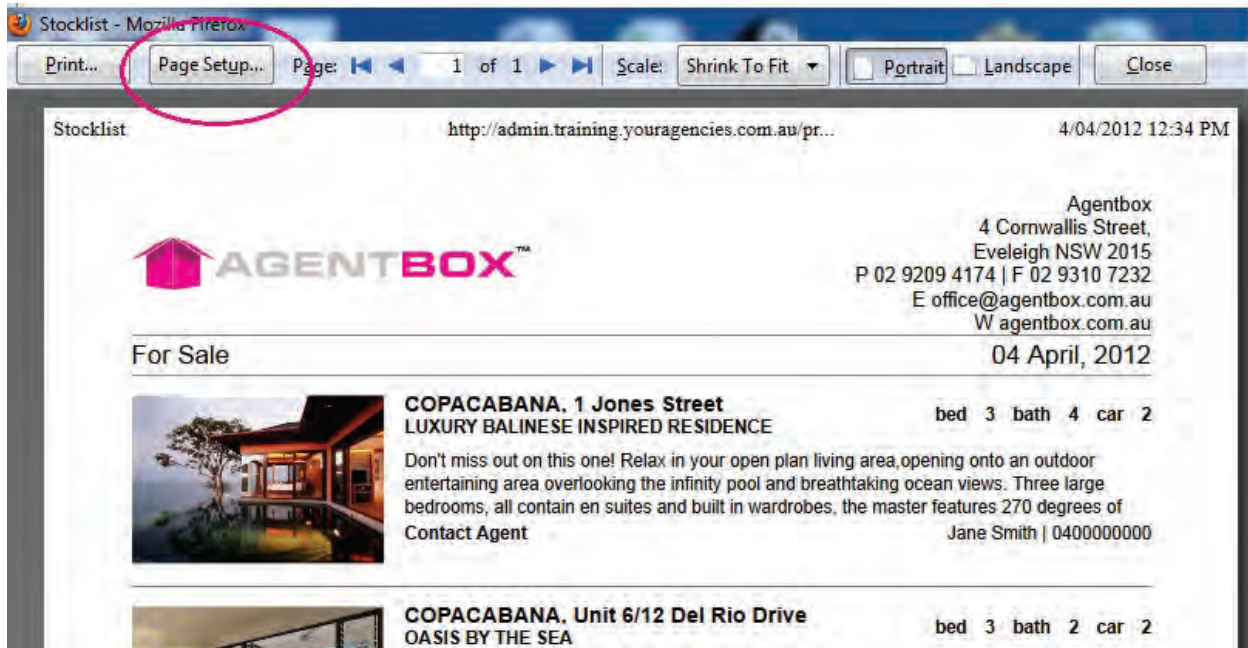


MANLY, 20 Darley Road
FABULOUS FAMILY HOME MOMENTS AWAY FROM bed 3 bath 1

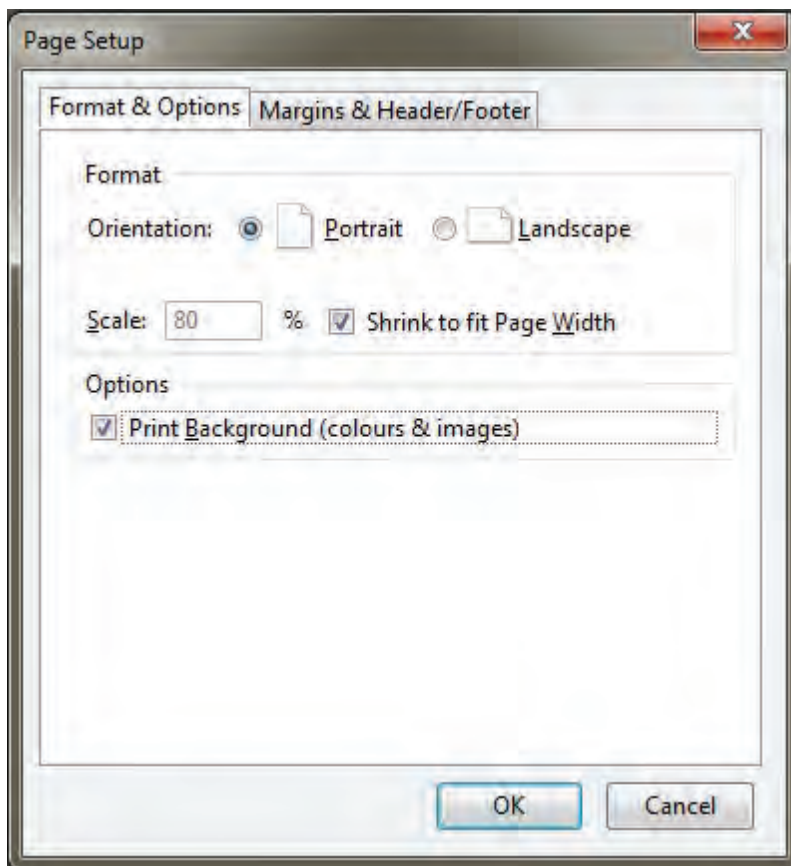
This deceptively spacious semi presents as a fabulous family home. Blessed with generous proportions and appealing interiors, this family home has been renovated throughout and extends through to a beautiful open plan living area with modern kitchen. Here you can watch

\$1,000,000 Joanne Coughlan | 0403 194 706

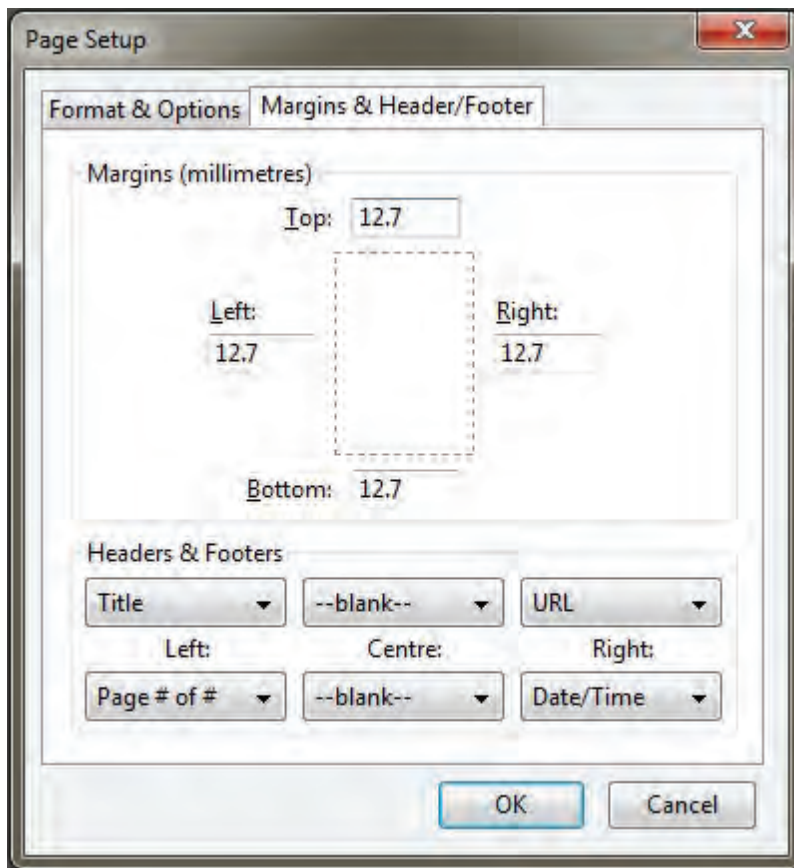
3. Click on Page Setup



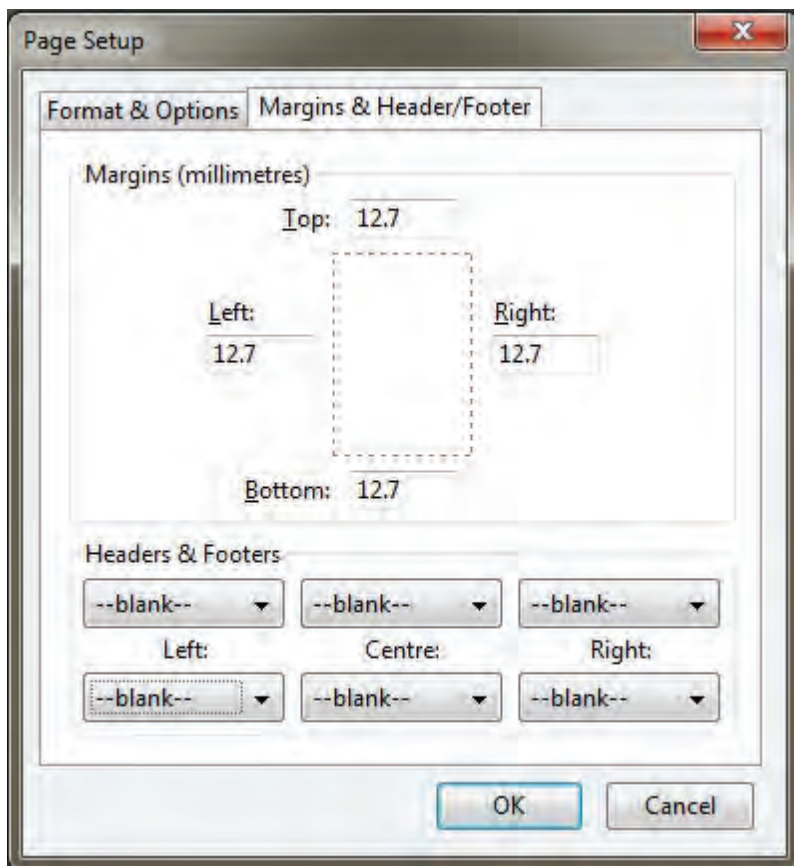
4. Ensure Print Background (colours & images) is ticked.



5. Click on Margins & Header/Footer




6. Change all other to --blank-- to eliminate all headers, footers and URL details.



7. Click Ok


8. Now if you generate a print preview before printing your html reports e.g. a stock list, or when conducting a mail merge you will notice they fit one per page.



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MANLY, 20 Darlev Road bed 3 bath 1
FABULOUS FAMILY HOME MOMENTS AWAY FROM

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\$1,000,000 Joanne Coughlan | 0403 194 708



SURRY HILLS, 52 Elizabeth Street bed 3 bath 2 car 1
ENTERTAINERS' RETREAT WITH SUPERB

Created to provide a relaxed haven for the entertainer, this immaculate home offers an easycare residence with superb harbour views. It combines flowing interiors, sunlit outdoor areas and quality finishes to deliver a property of charm and style. Generous living spaces

\$1.65mil Marcus Thompson



SYDNEY, 654 Victoria Street bed 4 bath 2 car 2
LARGE FAMILY HOME

Large living area with stunning 280 degree views. To die for location surrounded by the hustle and bustle of the city below in its own tranquil serenity.

\$2,250,000 Marcus Thompson