# Agentbox Training Manual

# **Table of contents**

| Welcome                           | 6  |
|-----------------------------------|----|
| System requirements               | 6  |
| Getting Started                   | 7  |
| Log In                            | 7  |
| Log out                           |    |
| Accessing Your Profile            | 8  |
| Change Password                   |    |
| Forgot Password                   | 12 |
| The Dashboard                     |    |
| Introduction to Dashboard         | 14 |
| The Universal Search Bar          |    |
| The Main Menu                     |    |
| Panels                            |    |
| Left Panel                        |    |
| Results Panel                     |    |
| Centre Panel                      |    |
| Right Panel                       |    |
| Help and Support                  |    |
| My Office                         |    |
| Office Details                    |    |
| Additional office income          |    |
| Office supplier items             |    |
| Add/Edit Staff                    |    |
| Staff Targets                     |    |
| Staff Debit/Credits               |    |
| View/Delete Staff Tasks           |    |
| Delete/Archive Staff              |    |
| Communicate to Staff              |    |
| Properties                        |    |
|                                   |    |
| The Property Card                 |    |
| Property Panel Tabs               |    |
| Property Action Icons             |    |
| Left Panel                        |    |
| Add Prospect Property             |    |
| Convert to Appraisal              |    |
| Add Appraisal Property            |    |
| Convert to Listing or Missed      |    |
| Add Property                      |    |
| Changing Property Status          |    |
| Property Resources                |    |
| Property Photos                   |    |
| Floorplans                        |    |
| Documents                         |    |
|                                   |    |
| OFI                               |    |
| Add Project                       |    |
| Add Properties to a Project       |    |
| Search for Property               |    |
| Search for Projects               |    |
| Search for Appraisal Properties 1 | 12 |

| Search for Prospect Properties     | 118 |
|------------------------------------|-----|
| Advanced Property Search           | 124 |
| Print Detailed Property Report     |     |
| Preview Property                   |     |
| Vendor Preview Link                |     |
| Email Property Contacts            | 136 |
| SMS Property Contacts              |     |
| E-Newsletter                       |     |
| Log a Property Enquiry             |     |
| View Recent Property Enquiries     |     |
| Contact Recent Enquirers           |     |
| Match Contacts                     |     |
| Appointment Inspection             |     |
| Add a Note                         |     |
| Add a Meeting                      |     |
| Tasks & Activity Schedules         |     |
| Send a Letter to Property Contacts |     |
| Sales Advice                       |     |
| Create Digital Media               |     |
| Property Hits                      |     |
| Portal Feed Logs                   |     |
| Marketing Funds                    |     |
| Log Marketing Funds                |     |
| Record Expenses                    |     |
| Log Payment                        |     |
| Print Report                       |     |
| Notes History                      |     |
| Property History                   |     |
| Inspection Feedback                |     |
| Contact Inspection Viewers         |     |
| Vendor Report                      |     |
| Log an Offer                       |     |
| Log a Contract Request             |     |
| View Property Modifications        |     |
| Conduct CMA                        |     |
| Commission                         |     |
| Contacts                           |     |
| The Contact Card                   |     |
| Contact Panel Tabs                 |     |
| Contact Action Icons               |     |
| Left Panel Tabs                    |     |
| Import Contacts                    |     |
| Add Contact                        |     |
| Add Business                       |     |
| Add Supplier                       |     |
| Supplier Items                     |     |
| Add Related Contact                |     |
| Add Related Property               |     |
| Letter Head                        |     |
| Search for Contact                 |     |
| Advanced Contact Search            |     |
| Print Detailed Contact Report      |     |
| Subscribe Contacts                 |     |
|                                    |     |

| Add Buyer/Tenant Requirements      | 281 |
|------------------------------------|-----|
| View Contact Inspections           |     |
| Email Contact                      |     |
| SMS Contact                        |     |
| E-Newsletter                       | 289 |
| Log a Contact Enquiry              | 292 |
| Communication History              |     |
| Inspections by Appointment         |     |
| Add a Meeting to a Contact         |     |
| Match Properties                   |     |
| Add a Note to a Contact            |     |
| View Contact Notes History         |     |
| Tasks & Activity Schedules         |     |
| View Applied Activity Schedules    |     |
| Send a Letter to a Contact         |     |
| View Contact Modifications         |     |
| Tasks                              |     |
| Task View                          |     |
| Other Ways to View Tasks           |     |
| Enter Tasks                        |     |
| Edit Tasks                         |     |
| Attach File to Task                |     |
| Assign Action to Task              |     |
| Completing Tasks                   |     |
| Bulk Complete Tasks                |     |
| Print Tasks                        |     |
| Create Activity Schedule           |     |
| Apply Activity Schedule            |     |
| Website                            |     |
| Edit Website Content               |     |
| Feature Property                   |     |
| Testimonials                       |     |
|                                    |     |
| Reports<br>View & Generate Reports |     |
|                                    |     |
| Generate Property Stocklist        |     |
| Performance                        |     |
|                                    |     |
| Portals                            |     |
| New Portal Set Up                  |     |
|                                    |     |
|                                    |     |
| Commercial Real Estate             |     |
|                                    |     |
| Home Away                          |     |
| Homehound.com.au                   |     |
| Homes247.com.au                    |     |
| Homesguide.com.au                  |     |
| Jewish Living                      |     |
| Realestate.com.au                  |     |
| RealCommercial.com.au              |     |
| Realestateview.com.au              |     |
| REIQ                               |     |
| REIWA                              | 358 |

| Rent.com.au                            | 359 |
|--|-----|
| Rentfind.com.au                        |     |
| Real Estate Publications Australia     |     |
| Stayz                                  |     |
| The Homepage & MillonPlus              | 361 |
| Trade Me                               |     |
| Portal Feed Logs                       |     |
| Portal Issues                          |     |
| Letter Generator                       | 366 |
| Create a Letter Template               |     |
| Copy a Letter Template                 |     |
| Edit a Letter Template                 |     |
| Delete a Letter Template               |     |
| Share a Letter Template                |     |
| Conduct a Mail Merge to Contacts       |     |
| Conduct a Mail Merge to Properties     |     |
| Avery Mailing Label Printing           |     |
| Variables                              |     |
| E-Newsletters                          |     |
| Send Bulk E-Newsletter                 |     |
| Create an E-Newsletter                 |     |
| Add E-Newsletter Sections              |     |
| Edit E-Newsletter Section              |     |
| Remove E-Newsletter Sections           |     |
| General FAQ                            |     |
| Insert Images to E-Newsletters         |     |
| Insert Links to E-Newsletters          |     |
| Attach file to E-Newsletter            |     |
| Changing a property Status             |     |
| My Log In Isn't Working                |     |
| Can't View Agentbox or Website         |     |
| Can't Make Property Available          |     |
| Duplicate Property                     |     |
| Contact CSV Download                   |     |
| Set Up SMS Tool                        |     |
| Distribute SMS Access                  |     |
| Cannot Find Photo                      |     |
| Issues Uploading Photos                |     |
| Mobile Access                          |     |
| Unsubscribed, Do Not Contact, Archived |     |
| Invalid Contact Email Address          |     |
| REST Professional Integration          |     |
| Print Settings                         |     |
|  |     |

## 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.

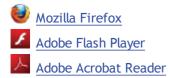
#### How do I organise more training?

For any on-line or on-site training enquiries please contact Agentbox Support on (02) 9209 4174 or email <a href="mailto:support@agentbox.com.au">support@agentbox.com.au</a>

## 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:



## What internet connection will I need?

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

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 environment of the second sec
- 2. Enter your email address as your Username and the temporary password emailed to you.
- 3. Click 'Login'

| My Admin               |                      |
|------------------------|----------------------|
| ¥ Login                |                      |
| Username:<br>Password: | john@agentbox.com.au |

## 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
- $_{\rm O}$   $\,$  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

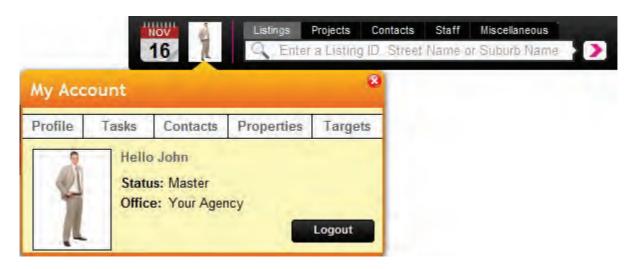
|                         | ✓ Staff Results                   | 6                                      |
|-------------------------|-----------------------------------|--|
| Edit Details            |                                   |  |
|                         | John Smith<br>Director            | @                                      |
| and the set of set set. |                                   |  |
| Search Add              |                                   |  |
|                         | w. Your search<br>arch all staff) | Edit Details<br>John Smith<br>Director |

4. Click on your name from the <u>Quick Finds Results Panel</u>.

| :: Staff : Jo                              | ohn Smith                 |        |       |                 |            |         |                | 8 |
|--|---------------------------|--------|-------|-----------------|------------|---------|----------------|---|
| Staff Details                              | Staff Photos              | Access | Tasks | Contacts        | Properties | Targets | Debits/Credits |   |
| Status:<br>First Name: *<br>Job Title:     | Curren<br>John<br>Princip |        |       | ]<br>] Last Nam | ie: *      | Smith   |                |   |
| Birthday:<br>Start Date:<br>Qualification: | 12                        |        | 2011  |                 |            |         |                | ш |
| Team(s):                                   |                           |        |       | ]               |            |         |                |   |
| Specialist Are                             | as:                       |        |       | add             |            |         |                |   |

## Universal Search Bar

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



2. Click on the Profile tab

| :: Staff : Jo  | ohn Smith      |        |       |          |            |         |                | 8 |
|--|----------------|--------|-------|----------|------------|---------|----------------|---|
| Staff Details  | Staff Photos   | Access | Tasks | Contacts | Properties | Targets | Debits/Credits |   |
| Status:<br>First Name: *                                 | Curren<br>John | ť      |       | Last Nam | e: *       | Smith   |                | * |
| Job Title:<br>Birthday:<br>Start Date:<br>Qualification: | Princip        |        | 011   |          |            |         |                | ш |
| Team(s):   |                |        |       | 1        |            |         |                |   |
| Specialist Are   | as:            |        |       | add      |            |         |                |   |

## **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"

| Staff Details St  | aff Photos  | Access   | Tasks                                   | Contacts | Properties   | Targets  | Debits/Credits |
|-------------------|---|--|---|----------|--|--|----------------|
| Permission Level  | Maste   | r  |   | 1        |  |  |                |
| Password:         |   | •••••  | •••••                                   | ]        |  |  |                |
| -:: Permissions : |   |  |   |          |  |  |                |
| Permission To:    | <ul> <li>✓ Act</li> <li>✓ Adt</li> <li>✓ Act</li> <li>✓ Act</li> <li>✓ Cat</li> </ul> | cess Accou<br>cess Marke<br>d a Meeting<br>d a Note<br>d a Task<br>hive a Cont<br>hive a Prop<br>n publish Lis<br>eate a Conta | ting Fund<br>act<br>erty<br>stings live |          | Create Medi<br>Create New<br>Download Co<br>Edit a Conta<br>Edit a Prope<br>Edit All Cont<br>Edit All Prop<br>Search & Vi<br>Search & Vi | Property<br>ontact CSV<br>act<br>rty<br>tacts<br>perties<br>ew All Conta | acts           |

# **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:<br>Password: | Login                |
| ✓ Forgot Pass          | word?                |
| Email Address:         | john@agentbox.com.au |

# 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. <u>Universal Search Bar</u> - 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. <u>Panels</u> - They system is made up of different panels e.g. each main menu Item will open up the matching 'Left Panel'

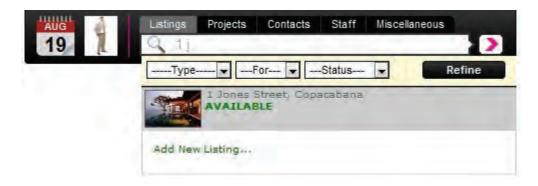
4. <u>Help and Support</u> - The Help and Support Icons take you to your help manual, system release notes and Agentbox Support contact details.



## **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.

| Му Асс  |       | 19  |            |        | 8 |  |
|---------|-------|---|------------|--------|---|--|
| Profile | Tasks | Contacts                                      | Properties | Target | s |  |
| J.      | Statu | o John<br>u <b>s:</b> Master<br>se: Your Ager | юу         |        |   |  |

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

|    |     |       |      |       |     | AUG    |            |    | 1     | isting | js    | Pro | jects | Contacts     | Staff    | Miscellaneous |   |
|----|-----|-------|------|-------|-----|--------|------------|----|-------|--------|-------|-----|-------|--------------|----------|---------------|---|
|    |     |       |      |       |     | 19     | - <b>`</b> |    | (     |        |       |     | ner m | iisc. keywor | d to sea | arch          | ) |
| 4  | D   | )ecer | nber | , 201 | 1   | > <<   | >> 4       | N  | lover | nber   | , 201 | 11  | *     |              |          |               |   |
| Mo | Tu  | We    | Th   | Fr    | Sa  | Su     | Mo         | Tu | We    | Th     | Fr    | Sa  | Su    |              |          |               |   |
| 28 | 29  | 30    | 1    | 2     | 3   | 4      | 31         | 1  | 2     | 3      | 4     | 5   | 6     |              |          |               |   |
| 5  | 6   | 7     | 8    | 9     | 10  | 11     | 7          | 8  | 9     | 10     | 11    | 12  | 13    |              |          |               |   |
| 12 | 13  | 14    | 15   | 16    | 17  | 18     | 14         | 15 | 16    | 17     | 18    | 19  | 20    |              |          |               |   |
| 19 | 20  | 21    | 22   | 23    | 24  | 25     | 21         | 22 | 23    | 24     | 25    | 26  | 27    |              |          |               |   |
| 26 | 27  | 28    | 29   | 30    | 31  |        | 28         | 29 | 30    | 1      | 2     | 3   | 4     |              |          |               |   |
| 2  | З   | 4     | 5    | 6     | 7   | Task I | Due (1)    | )  |       | 8      | 9     |     | 11    |              |          |               |   |
|    | Zoo | om in | this | mo    | nth | Add    |            |    | -     | this   | mo    | nth |       |              |          |               |   |

# 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

#### <u>Tasks</u>

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 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. <u>Left Panel</u> <u>Fast Find Results Panel</u> <u>Main Panel</u> <u>Right Panel</u>

#### 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.

| 合 Listing - ID#1P0001               | :: Listing : ID#1P0001 - 1 Jo       | nes Street, Copacabana    |                  | • 8                |  |
|-------------------------------------|-------------------------------------|---------------------------|------------------|--------------------|--|
| < Back to Properties                |                                     |                           |                  | Full View          |  |
| > Notes History                     |                                     | en Homes Agents & Contact | s Resources Comm | nission            |  |
| > Recent Enquiries                  | Status: Available                   |                           |                  |                    |  |
| > Property History                  | For Sale/Rental: For Sale           |                           |                  | States in          |  |
| > Buyer Feedback & Vendor Report(2) | Type: * Residential                 |                           |                  | A HILL PROV        |  |
| > Offers Made                       | Category: * House                   |                           |                  | Copy This Property |  |
| > Contracts Requested               | Investment?:                        |                           |                  | endor Preview Link |  |
| > Property Modifications Log        | Sale Method: Private Treaty         | <b>•</b>                  |                  |                    |  |
| > Links to Portals                  | Authority: Exclusive Property Name: |                           |                  |                    |  |
| > Help Text                         | Level No.: Unit N                   | o.: Street No.:           | 1                |                    |  |
|                                     | Street Name: * Jones                | Street Type: *            | Street           | -                  |  |
|                                     | Suburb: * COPACABANA                | 2251) State: *            | NSW              |                    |  |
|                                     | 111.4. A.d.a                        | n (n. 1                   |                  |                    |  |
|                                     | Save                                |                           |                  |                    |  |

#### **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.

| 🏫 Prop  | erties               |                  | ✓ Property Results   | 6 |
|---|----------------------|------------------|--|---|
| will auto filter         Address:       [         For:       [         Features:       [         From \$:       [ | your property result | ype: Residential | ID #1P0001<br>1 Jones Street<br>Copacabana<br>Contact Agent<br>AVAILABLE |   |
| The second  | roject / Devel       | Advanced Sear    | <u>ch</u>  |   |

#### **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 <u>Universal Search</u> <u>Bar</u> 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.

| 合 Listing - ID#1P0001               | :: Listing : ID#1            | P0001 - 1 Jones St | reet, Copacabar  | la                | • 8         |              |           |
|-------------------------------------|------------------------------|--------------------|------------------|-------------------|-------------|--------------|-----------|
| < Back to Properties                | # @ = 0                      | 1 🗭 🎓 🙆 🛛          | ' 🔛 🖻 😭 I        |                   | Full View   |              |           |
| > Notes History                     | General For Sale             | Features Open Hon  | :: Contact : Mi  | ichael Johnson    |             |              |           |
| > Recent Enquiries                  | Status:                      | Available          |                  |                   | E O         |              | Full Viev |
| > Property History                  | For Sale/Rental:             | For Sale           |                  |                   |             |              | T un vici |
| > Buyer Feedback & Vendor Report(2) | Type: *                      | Residential        |                  |                   | perces (Z)  |              | _         |
| > Offers Made                       | Category: *                  | House              | Status: *        | Active            |             |              |           |
| > Contracts Requested               | Investment?:                 | 0                  | Title:           | Mr                | Home Phone: | 02 9564 2533 |           |
| > Property Modifications Log        | Sale Method:                 | Private Treaty     | Salutation:      |                   | Work Phone: | 02 3564 2555 |           |
| > Links to Portals                  | Authority:<br>Property Name: | Exclusive          | First Name: *    | Michael           | Mobile:     | 0411 222 333 |           |
| > Help Text                         | Level No.:                   | Unit No.:          | Last Name: *     | Johnson           | Facsimile:  |              |           |
|                                     | Street Name: *               | Jones              | Email:           | mick@gmail.com    | Company:    |              |           |
|                                     | Suburb: *                    | COPACABANA (2251)  | Residential Addr | ess: 5 Miles Road |             |              |           |
|                                     | 104- Add                     |                    | Suburb:          | Sydney            | State:      | NSW          | •         |
|                                     |                              | Save               | Postcode:        | 2000              | Country:    | Australia    | -         |

## **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.

| Listing - ID#1P0001  | :: Listing : ID#1P0001 - 1 Jones Street, Copacabana 😌 😣  | Inspection Feedback  |
|--|--|--|
| Back to Properties   | 🏥 @ 🖥 🖻 🖗 🎓 🚱 🖬 🗄 🔛 🏜 🖬 🎝 Full View  | Add Feedback (1) Other Feedback                            |
| > Notes History<br>> Recent Enquiries  | General For Sale Features OFI Agents & Contacts Resources Commission   | 1 Jones Street, Copacabana<br>07/12/2011 10:00am - 10:30am |
| Property History   | Status: Available   For Sale/Lease: For Sale  For Sale/Lease: For Sale  Status: Status | Contact: Enter Name, Phone or Email                        |
| V Inspections (4) & Feedback (6)<br>Date Period Aud By Appointment               | Type: * Residential  Category: House   | Price Feedback \$: Classification                          |
| 7/12/2011 10:00 AM - 10:30 AM Feedback   | Investment?:  Sale Method:  Private Treaty   | Comments:  |
| 0/11/2011 09:00 AM - 10:00 AM Feedback<br>7/11/2011 10:00 AM - 10:30 AM Feedback | Authority: Exclusive  Property Name: Level No: Unit No: Street No: 1   | Save & Add Another Save & View Conta                       |
| 5/11/2011 10:00 AM - 10:30 AM Feedback   | 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.  | Sare's Add Alfolder  |
| All Viewers Feedback Report  | Address Format: [] Jones Street  |  |
| <ul> <li>Activity Schedules</li> <li>&gt; Offers Made(1)</li> </ul>              | Consta Mane  |  |

## **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

#### My Office



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

## **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

| <ul> <li>Office Details</li> </ul>   | Edit Details         |
|--|----------------------|
| Your Agency  |                      |
| [P] 02 9209 4174   |                      |
| [F] 02 9310 7232   |                      |
| [E] oa@agentbox.com.au   |                      |
| [A] 4 Cornwallis Street, Eveleigh, NSW   |                      |
| ∽ Staff Members  |                      |
| Enter a staff member's first or last nam<br>will auto filter your results. (Type 'ALL' | A BELOIDE CONTRACTOR |
| Roles:   |                      |
| Admin  |                      |
| Director Personal Assistant  | H                    |
| Principal  |                      |
| Dranatty Management  |                      |

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.

| My Office                                |                          | :: Office : Ye  | our Agenc | У                  |                |                  |                | •  |
|--|--------------------------|-----------------|-----------|--------------------|----------------|------------------|----------------|----|
| Office Details                           | Edit Details             | Office Details  | Resources | Portal Exports     | Portal Logs    | Monthly Income   | Supplier Items |    |
| Your Agency                              |                          | Office: *       | Your A    | I                  |                |                  | 1              |    |
| [P] 02 9209 4174                         |                          | ABN:            |           | 112 142            |                |                  |                |    |
| [F] 02 9310 7232                         |                          | Office Phone:   | 02 920    | 09 4174            | Office Pho     | one 2:           |                |    |
| [E] oa@agentbox.com.au                   |                          | Office Fax:     | 02 93     | 10 7232            | -              |                  |                |    |
| [A] 4 Cornwallis Street, Eveleigh, NS    | SW                       | Office Email: * | loa@a     | gentbox.com.au     | F              |                  |                |    |
| ✓ Staff Members                          |                          | Office Mobile:  | -         |                    | =              |                  |                |    |
| Enter a staff member's first or last n   |                          |                 | Ena       | ible SMS for offic | e mobile numb  | ber              |                |    |
| will auto filter your results. (Type 'Al | LL' to search all staff) | Street Address: | 4 Corr    | wallis Street      | _              |                  |                |    |
| Roles:                                   |                          | Suburb:         | Evelei    | ab                 | State:         | NSW              |                |    |
| Admin<br>Director                        |                          | Postcode:       | 2015      | 0.0                | Ξ              | 1000             |                | L. |
| Personal Assistant                       | <u></u>                  |                 | V Tic     | k if mailing addre | ss is the same | as what's above. |                |    |
| Principal                                |                          | Principal's Nam |           |                    |                |                  |                |    |
| Active                                   | Search Add               |                 |           | -                  |                |                  |                |    |
| IActive                                  |                          |                 | Si        | ave                |                |                  |                |    |
|  |                          |                 |           |                    |                |                  |                |    |

# **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

| Income         |               |                              |             |                |                |                   |
|----------------|---------------|------------------------------|-------------|----------------|----------------|-------------------|
| Office Details | Resources     | Portal Exports               | Portal Logs | Monthly Income | Supplier Items |                   |
|                |               |                              |             |                |                | iew Past Income » |
| Income Type: * | Property      | y Management In <del>▼</del> | ]           |                |                |                   |
| ncome Month:   | * Jan         |                              | 2011        |                |                |                   |
| ncome Amoun    | t(\$): * 1500 |                              | ]           |                |                |                   |
| Franchise Fee: | 5             |                              | 9% Flat F   | ee \$          |                |                   |
|                | Sav           | e                            |             |                |                |                   |
|                | Juv           |                              |             |                |                |                   |
|                |               |                              |             |                |                |                   |
|                |               |                              |             |                |                |                   |
|                |               |                              |             |                |                |                   |
|                |               |                              |             |                |                |                   |
|                |               |                              |             |                |                |                   |
|                |               |                              |             |                |                |                   |
|                |               |                              |             |                |                |                   |
|                |               |                              |             |                |                |                   |

#### 5. Click Save

| Office Details | Resources  | Portal Exports   | Portal Logs | Monthly Income            | Supplier | tems               |       |
|----------------|------------|------------------|-------------|---------------------------|----------|--------------------|-------|
|                |            |                  |             | Concernance of the second | -        | Add Monthly Income | 9 w - |
| Month          | Income 1   | Types            |             | Amount                    | s F      | ranchise Fees      |       |
| Jan 2011       | Property I | Management Incom | e           | \$1,500                   | \$       | 75                 |       |
|                |            |                  |             |                           |          |                    |       |
|                |            |                  |             |                           |          |                    |       |
|                |            |                  |             |                           |          |                    |       |

## **Office supplier items**

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

You can add office supplier items that can be <u>applied to a staff member</u> 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

| <ul> <li>Office Details</li> </ul>  | Edit Details            |
|---|-------------------------|
| Your Agency   |                         |
| [P] 02 9209 4174  |                         |
| [F] 02 9310 7232  |                         |
| [E] oa@agentbox.com.au  |                         |
| [A] 4 Cornwallis Street, Eveleigh, NSW  |                         |
| y Staff Members   |                         |
| Enter a staff member's first or last name<br>will auto filter your results. (Type 'ALL' t | A DISTRICT ONLY DEPOSIT |
| Roles:  |                         |
| Admin<br>Director   | -                       |
| Personal Assistant  | Ш.                      |
| Principal   | -                       |
| Droparti Managament   |                         |

- 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 Details                 | Resources | Portal Exports      | Portal Logs   | Monthly Income | Supplier Items |  |
|--------------------------------|-----------|---------------------|---------------|----------------|----------------|--|
| - Existing Iten<br>Name: Advar |           | e: 500 , Debit/Cred | it: Debit Eda | i C            |                |  |
| tem Name; *<br>Price: *        | -         |                     |               |                |                |  |
| Debit/Credit:<br>Comment: *    | Debit     |                     |               |                |                |  |
| comment.                       |           |                     |               |                |                |  |
|                                |           |                     |               |                |                |  |
|                                |           |                     |               |                |                |  |

## 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.

| <ul> <li>Office Details</li> </ul>   | Edit Details   |
|--|--|
| Your Agency  |  |
| [P] 02 9209 4174   |  |
| (F] 02 9310 7232   |  |
| [E] oa@agentbox.com.au   |  |
| [A] 4 Cornwallis Street, Eveleigh, NSW   |  |
| ≺ Staff Members  | _  |
| Enter a staff member's first or last name<br>will auto filter your results. (Type 'ALL' to | THE PARTY OF THE P |
| Roles:   |  |
| Admin  | •  |
| Director Personal Assistant  | H  |
| Principal  |  |
| Departy Management   | -  |

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 - Co           |              |        | -     | -               |            |         |                | - |
| Staff Details              | Staff Photos | Access | Tasks | Contacts        | Properties | Targets | Debits/Credits |   |
| Status:<br>First Name: *   | Curren       | it     |       | ]<br>] Last Nam | ie;*       |         |                |   |
| Job Title:<br>Birthday:    |              |        |       |                 |            |         |                | 1 |
| Start Date:                | 18           |        | 2011  |                 |            |         |                |   |
| Qualification:<br>Team(s): |              |        | ÷     | 1               |            |         |                |   |
|                            |              |        |       |                 |            |         |                |   |
| Constallat Asso            |              |        |       | 1               |            |         |                |   |
| Specialist Area            | as:          |        |       | add             |            |         |                |   |

- 4. Save and Proceed
- 5. Upload staff photo o Click Upload

| Staff : M      | elanie Thor     | npson        |          |          |            |         |                  |
|----------------|-----------------|--------------|----------|----------|------------|---------|------------------|
| tep 2 of 3 - U | pload Staff Pho | oto          |          | -        |            | 2 -     |                  |
| Stall Details  | Staff Photos    | Access       | Tasks    | Contacts | Properties | Targets | Debits/Gredits   |
| taff Photo:    | No Pro          | file Photo u | ploaded. | Upload   |            |         |                  |
| « Previous     | Step            |              |          |          |            | 1       | Save & Proceed » |
|                |                 |              |          |          |            |         |                  |
|                |                 |              |          |          |            |         |                  |
|                |                 |              |          |          |            |         |                  |
|                |                 |              |          |          |            |         |                  |
|                |                 |              |          |          |            |         |                  |
|                |                 |              |          |          |            |         |                  |
|                |                 |              |          |          |            |         |                  |
|                |                 |              |          |          |            |         |                  |

#### 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.

|                | 1 and 1 a |        |
|----------------|---|--------|
|                | Overall progress  |        |
|                |   | 0%     |
|                | File Progress   |        |
|                |   | 0%     |
|                |   |        |
| Clear List     |   | Upload |
| ected Files :: |   | -      |

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

| Select file(s) to up   | load by admin.tr             | aining.youragencies.com.a    | au | - | - | x              |
|--|------------------------------|------------------------------|----|---|---|----------------|
| Look in:<br>Recent Places<br>Desktop<br>Desktop<br>Libraries<br>Computer | photos<br>Photos<br>melanie  |                              |    |   | * |                |
|  | File name:<br>Files of type: | melanie<br>Jpeg only (* jpg) |    |   | • | Open<br>Cancel |

o Click Upload

| Browse Files      |                                     |         |
|-------------------|-------------------------------------|---------|
|                   | Overall Progress (20.9 kB)          |         |
|                   |                                     | 26%     |
|                   | File Progress "melanie.jpg"         |         |
|                   | Upload with 89.8 kB/s. Time left: ~ | 26%     |
| Clear List        |                                     | Upload  |
| Selected Files :: |                                     |         |
| melanie.jpg       |                                     | 20.9 kB |

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

| :: Staff : M    | elanie Thon     | npson  |        |          |            |         |                  |
|-----------------|-----------------|--------|--------|----------|------------|---------|------------------|
| Step 2 of 3 - U | pload Staff Pho | oto    |        |          | 1 1 1      | 2 -     |                  |
| Staff Details   | Staff Photos    | Access | Tasks  | Contacts | Propetties | Targets | Debits/Credits   |
| Staff Photo:    | 4               | Delete | Upload |          |            |         |                  |
| « Previous      | Step            |        |        |          |            |         | Save & 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 <u>Click here</u> to view the permissions overview

| Step 3 of 3 - Comple   | ete Syster   | n Access [   | Details  |             |   |  |                 |   |
|--|--|--|--|-------------|---|--|-----------------|---|
| Staff Details Staf   | f Photos   | Access   | Tasks  | Contacts    | Properties  | Targets  | Debits/Credits  |   |
| Permission Level:<br>Password:<br>submission.<br>-:: Permissions ::- | No Ac<br>Admin<br>Maste<br>Princij   | r<br>pal   |  | ically gene | rated and sen   | t to the stat  | ff member after | 1 |
| Permission To:   | Sales<br>Sales<br>Sales<br>Add<br>Add<br>Add<br>Add<br>Add<br>Add<br>Add<br>Car<br>Car | ty Manage<br>/ Sales As:<br><u>Manager</u><br>cess Marke<br>I a Meeting<br>I a Note<br>I a Task<br>hive a Cont<br>hive a Prop<br>1 publish Li: | sistant<br>ting Fund<br>act<br>erty<br>stings live |             | Create New<br>Download Co<br>Edit a Conta<br>Edit a Prope<br>Edit All Cont<br>Edit All Prop<br>Outlook Con<br>Search & Vi<br>Send E-New | ontact CSV<br>act<br>rty<br>tacts<br>perties<br>nector set<br>ew All Cont; | E               |   |
|  | Cre  | ate a Conta<br>ate and Vie   |  | s           | Send SMS Share Conta  | cts  | +               |   |

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: <u>Tasks</u>, Contacts, Properties, <u>Targets</u> and <u>Debits/Credits</u>

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

| Staff Details   | Staff Photos  | Access | Tasks            | Contacts | Properties | Targets     | Debits | /Credits     |
|-----------------|---------------|--------|------------------|----------|------------|-------------|--------|--------------|
| Sort By: Cont   | act Name: A-Z |        |                  |          |            | 1           |        |              |
| Contact         |               | 1      | Assigned         | Staff    | 1          | ast Contact | ed     | Contact Info |
| Colin Fairlight |               |        | Melanie Thompson |          |            |             |        | 012          |
| Sarah Turner    |               | 1      | Melanie Thompson |          |            |             |        | 02           |
|                 |               |        |                  |          |            |             |        |              |

11. Click on the Properties tab to view their related Properties

| Sort By: Proper |            |                            |   | Properties | Targets | Debits/Credits        |
|-----------------|------------|----------------------------|---|------------|---------|-----------------------|
|                 | rty Status | R                          | efine   |            |         | 2                     |
|                 | 12         | ) #1P0003                  | 52 Elizabeth Stree<br>Surry Hills<br>Thomas Train (Ve |            |         | Contact Agen          |
|                 | 7          | ) #1P0002<br><b>FELINE</b> | Unit 6/12 Del Rio<br>Copacabana<br>Michael Johnson    |            |         | 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 <u>Left Panel</u> and the staff member will appear on the staff results panel.

| My Office  | ✓ Staff Results |                           |   |
|--|-----------------|---------------------------|---|
| Office Details   | Edit Details    |                           | 0 |
| Your Agency<br>[P] 02 9209 4174  |                 | Melanie Thompson<br>Admin | 0 |
| F] 02 9310 7232  |                 |                           |   |
| E] office@agentbox.com.au  |                 |                           |   |
| [A] 4 Cornwallis Street, Eveleigh, NSW   |                 | 110                       |   |
| ✓ Staff Members (1 found)  |                 |                           |   |
| Enter a staff member's first or last name b<br>will auto filter your results. (Type 'ALL' to |                 | -                         |   |
| Roles:<br>Admin<br>Director<br>Personal Assistant<br>Principal                               | × 111 +         |                           |   |
| mel Active   | Search Add      |                           |   |

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 : M  | elanie Thor  | npson        |       |          |            |  |                | 8 |
|---------------|--------------|--------------|-------|----------|------------|--|----------------|---|
| Staff Details | Staff Photos | Access       | Tasks | Contacts | Properties | Targets  | Debits/Credits |   |
| Gross Commis  | S10.0        | 00 for Jan 2 | 2012  |          | -,         | 2012   | Add            |   |
| No. of Sales: | ☑ 4 for ↓    | lan 2012     |       |          | ][Jan [    | ✓ select y<br>select y<br>2012<br>2011<br>2010<br>2009 |                | μ |

## **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 <u>Left Panel</u> and to staff member will appear on the staff results panel.

|                                   | ∽ Staff Results                   | 6   |
|-----------------------------------|-----------------------------------|---|
| Edit Details                      |                                   |   |
|                                   | Melanie Thompson<br>Admin         | 0   |
| w, Your search<br>arch all staff) |                                   |   |
| Search Add                        |                                   |   |
|                                   | w. Your search<br>arch all staff) | Edit Details Melanie Thompson Admin  W. Your search arch all staff) |

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

| :: Staff Co   | nsumables :  | Melanie | Thom  | pson     |            |         |                | - 8 |
|---------------|--------------|---------|-------|----------|------------|---------|----------------|-----|
| Staff Details | Staff Photos | Access. | Tasks | Contacts | Properties | Targets | Debits/Credits |     |
|               |              |         |       | P        | ł. s       |         |                |     |
|               |              |         |       |          |            |         | Add Debit/Cred | -   |
|               |              |         |       |          |            |         |                |     |
|               |              |         |       |          |            |         |                |     |
|               |              |         |       |          |            |         |                |     |
|               |              |         |       |          |            |         |                |     |
|               |              |         |       |          |            |         |                |     |
|               |              |         |       |          |            |         |                |     |
|               |              |         |       |          |            |         |                |     |
|               |              |         |       |          |            |         |                |     |
|               |              |         |       |          |            |         |                |     |
| 1             |              |         |       |          |            |         |                | _   |
|               |              | _       |       |          |            |         |                | -   |

#### 4. Click Add Debit/Credit

5. Enter the Debit/Credit details and select save. Office Supplier Items can be added in My Office

| Staff Details S   | tall Photos       | Access                                  | Tasks | Contacts | Properties | Targets | Debits/Credits |        |
|---|-------------------|---|-------|----------|------------|---------|----------------|--------|
| Date: *<br>Supplier: *<br>tem: *<br>Qty.: *<br>Price \$: *<br>Debit/Credit:<br>Comment: | the second second | ][11 ][2<br>Agency (Off<br>ce Paid (\$5 |       |          |            |         | View Debits C  | redits |

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.

| aff Details | Staff Photos | Access,    | Tasks | Contacts    | Properties | Targets  | Debits/Credits   |
|-------------|--------------|------------|-------|-------------|------------|----------|------------------|
|             |              | -          |       |             |            |          | Add Debit/Credit |
| Date        | Supplier     |            |       | Items       | 1          | Cost     | Debit/Credit     |
| 18 Nov 11   | Your Agenc   | y (Office) |       | (1) Advance | Paid       | \$500.00 | Debit            |
|             |              |            |       |             |            |          |                  |

## **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 <u>Left Panel</u> and to staff member will appear on the staff results panel.

| My Office  |   | ∽ Staff Results           | 6 |
|--|---|---------------------------|---|
| Office Details   | Edit Details  |                           |   |
| Your Agency<br>[P] 02 9209 4174  |   | Melanie Thompson<br>Admin | 0 |
| [F] 02 9310 7232   |   |                           |   |
| [E] office@agentbox.com.au   |   |                           |   |
| [A] 4 Cornwallis Street, Eveleigh, NSW   |   |                           |   |
| ∽ Staff Members (1 found)  |   |                           |   |
| Enter a staff member's first or last name<br>will auto filter your results. (Type 'ALL' to | THE PERSON NEW YORK AND A DRIVEN AND A |                           |   |
| Roles:<br>Admin<br>Director<br>Personal Assistant<br>Principal<br>Dreporty Menagement      | * E +   |                           |   |
| mel  | Search Add  |                           |   |
|  |   |                           |   |

- 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

# **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 <u>Left Panel</u> and to staff member will appear on the staff results panel.

| My Office  | ∽ Staff Results |                           |   |
|--|-----------------|---------------------------|---|
| Office Details   | Edit Details    |                           | 0 |
| Your Agency  |                 | Melanie Thompson<br>Admin | 0 |
| P] 02 9209 4174  |                 |                           |   |
| F] 02 9310 7232  |                 |                           |   |
| E] office@agentbox.com.au  |                 |                           |   |
| A] 4 Cornwallis Street, Eveleigh, NSW  |                 |                           |   |
| <ul> <li>Staff Members (1 found)</li> </ul>  |                 |                           |   |
| Enter a staff member's first or last name l<br>will auto filter your results. (Type 'ALL' to |                 |                           |   |
| Roles:   | <u> </u>        |                           |   |
| Director   | E               |                           |   |
| Personal Assistant   |                 |                           |   |
| Principal  | +               |                           |   |
| mel Active   | Search Add      |                           |   |
|  |                 | 1.0                       |   |
|  |                 |                           |   |

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 : Me  | elanie Thor                | npson      |          |          |            |          |                | 8 |
|--|----------------------------|------------|----------|----------|------------|----------|----------------|---|
| Staff Details  | Staff Photos               | Access     | Tasks    | Contacts | Properties | Targets  | Debits/Credits |   |
| Status:<br>First Name: *                                 | Curren<br>Curren<br>Delete | t<br>d     | <b>I</b> | Last Nam | e:*        | Thompson |                | ŕ |
| Job Title:<br>Birthday:<br>Start Date:<br>Qualification: | Sales I                    | Representa | tive     |          |            |          |                | ш |
| Team(s):   |                            |            |          |          |            |          |                |   |
| Specialist Area  | 15:                        |            |          | aild     |            |          |                |   |

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

| Contacts: Select a Staff Member |    |
|---------------------------------|----|
|                                 | J× |
| Tasks: Select a Staff Member    | •  |
| Save Cancel                     |    |

## **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.

| My Office   |  | ✓ Staff Results                          | 6  |
|---|--|--|----|
| Office Details  | Edit Details   | 1  |    |
| Your Agency<br>[P] 02 9209 4174   |  | Joe Franks<br>Sales Representative       | @. |
| [F] 02 9310 7232<br>[E] office@agentbox.com.au  | John Smith<br>Director<br>0408676707   | 9  |    |
| [A] 4 Cornwallis Street, Eveleigh, NSW  | Jane Thomas<br>Admin   | 0  |    |
| <ul> <li>Staff Members (1 found)</li> <li>Enter a staff member's first or last name be<br/>will auto filter your results. (Type 'ALL' to s</li> </ul> | A COMPANY OF A COM | Melanie Thompson<br>Sales Representative | 0  |
| Roles:<br>Admin<br>Director<br>Personal Assistant<br>Principal<br>Connection<br>Active  | E<br>Search Add  |  |    |

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** 

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.

- o Main Property Panel & Tabs
- o Property Action Icons
- o Left Panel Tabs

### **Property Panel Tabs**

### Main Property Panel & Tabs

| General | For Sale | Features | OF | Agents & Contacts | Resources | Commission |
|---------|----------|----------|----|-------------------|-----------|------------|
|---------|----------|----------|----|-------------------|-----------|------------|

- <u>General</u> 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.
- <u>Features</u> 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.
- <u>Agents & Contacts</u> 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.
- <u>Resources</u> This is where you can upload your images, floor plans, links, agency agreements etc.
- <u>Commission</u> Master users can complete the property commission data once the property status is changed to Exchanged/under contract.

| :: Listing : ID#1F | 20001 - 1 Jones Stree | et, Copaca  | bana      |            | 0                     |
|--------------------|-----------------------|-------------|-----------|------------|-----------------------|
|                    | P 2 0 1               |             |           | 100        | Full View             |
| General For Sale   | Features OFI Agents   | & Contacts  | Resources | Commission |                       |
| Status:            | Available             |             |           |            | -                     |
| For Sale/Rental:   | For Sale              |             |           |            |                       |
| Туре: *            | Residential           |             |           |            |                       |
| Category: *        | House                 |             |           |            | Copy This Property    |
| Investment?:       |                       |             |           |            | Vendor Preview Link   |
| Sale Method:       | Private Treaty        |             |           |            |                       |
| Authority:         | Exclusive             |             |           |            |                       |
| Property Name:     |                       |             |           |            | and the second second |
| Level No.:         | Unit No.:             | Street No.: | 1         |            |                       |
| Street Name: *     | Jones                 | Street Type | :* St     | reet       |                       |
| Parkasak *         |                       | Ca.a        |           |            |                       |
|                    | Save                  |             |           |            |                       |

### **Property Action Icons**



#### From Left to Right

- Preview Property- Preview how the property will look on the website
- <u>Email</u> 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.
- <u>SMS</u> 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)
- <u>E-Newsletter</u> 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.
- <u>Match Contacts</u> Match available contacts suitable for the property. Only appears if the contacts <u>requirements</u> 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.
- <u>Tasks & Activity Schedules</u>- Apply a single task, activity schedule or view active and completed tasks against the property.
- <u>Send a Letter</u>- Send a letter or sales advice directly to the related contacts, edit/create a letter template and access previously sent letters.
- O Brochures & Window Cards- Create a Brochure or Window card for the property using the high

res images.

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

| :: Listin   | g:ID#1F  | 0001 - 1     | Jone     | s Stree | et, Copaca  | bana     |     |            | •                   |
|-------------|----------|--------------|----------|---------|-------------|----------|-----|------------|---------------------|
| # @         |          |              | Ó        |         |             |          | -   | 120        | Full View           |
| General     | For Sale | Features     | OFI      | Agents  | & Contacts  | Resource | 205 | Commission |                     |
| Status:     |          | Available    |          |         |             | -        |     |            | and -               |
| For Sale/I  | Rental:  | For Sale     |          | -       |             |          |     |            |                     |
| Type: *     |          | Residential  | 1        | -       |             |          |     |            | - AND - TRUE        |
| Category:   | *        | House        |          | -       |             |          |     |            | Copy This Property  |
| Investmen   | nt?:     |              |          |         |             |          |     |            | Vendor Preview Link |
| Sale Meth   | od:      | Private Trea | tγ       |         |             |          |     |            |                     |
| Authority:  |          | Exclusive    |          |         |             |          |     |            |                     |
| Property I  | Name:    |              |          |         |             |          |     |            |                     |
| Level No.   |          | U []         | nit No.: |         | Street No.: |          | 1   |            |                     |
| Street Na   | me:*     | Jones        |          | 1       | Street Type | *        | St  | reet       |                     |
| Parkingki * |          |              | 114 100  | (4) I   | Pa.a        |          | 1   |            |                     |
|             | _        | Save         |          |         |             |          |     |            |                     |

### 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 <u>main</u> <u>property panel.</u>

| Listing - ID#1P0001              |
|----------------------------------|
| < Back to Properties             |
| > Notes History                  |
| > Recent Enquiries               |
| > Property History               |
| > Inspections (4) & Feedback (6) |
| > Activity Schedules             |
| > Offers Made(1)                 |
| > Contracts Requested(3)         |
| > Property Modifications Log     |
| > Links to Portals               |
| > Help Text                      |

- O Notes History This section will display all the saved notes relating to the current property
- <u>Recent Enquiries</u> This section will display all the <u>Logged Enquiries</u> relating to the current property being viewed, you can also communicate to this list of <u>enquires</u>.
- <u>Property History</u> 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
- <u>Contracts Requested</u> This section allows you to keep a record of contract requests and also populates the fee <u>feedback report</u>
- 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.
- <u>Links to Portals (CMA)</u> This section provides links to current listings and recent sales similar to the current property on realestate.com.au and domain.com.au

| 合 Listing - ID#1P0001            | :: Listing : ID#1 | 20001 - 1 Jones    | Street, Copacabar        | ia                  |              |
|----------------------------------|-------------------|--------------------|--------------------------|---------------------|--------------|
| < Back to Properties             |                   | 1 2 3              |                          |                     | Full View    |
| > Notes History                  | General For Sale  | Features OFI       | Agents & Contacts Re     | sources Commission  |              |
| > Recent Enquiries               | Status:           | Available          |                          | Copy This Property  |              |
| > Property History               | For Sale/Lease:   | For Sale           |                          | Vendor Preview Link | - States     |
| > Inspections (4) & Feedback (6) | Type: *           | Residential        | •                        |                     |              |
| > Activity Schedules             | Category: *       | House              | •                        |                     | E CONTRACTOR |
| > Offers Made(1)                 | Investment?:      |                    |                          |                     |              |
| > Contracts Requested(3)         | Sale Method:      | Private Treaty     |                          |                     |              |
| > Property Modifications Log     | Property Name:    | Exclusive          |                          |                     |              |
| > Links to Portals               | Level No.:        | Unit No.:          | Street No.;              | 1                   |              |
| > Help Text                      | Street Name: *    | Jones              | Street Type:             | Street              | -            |
| - neip text                      | Suburb: *         | COPACABANA (2251   | 1) State: *              | NSW                 |              |
|                                  | Hide Address?:    | Tick to hide the a | address on your web site | h.                  | -            |
|                                  |                   | Save               |                          |                     |              |

# **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 <u>access permissions</u>.

| Available  | Inspections                                   | Off Market                        |
|------------|---|-----------------------------------|
|            | rd or fill in property<br>/our property resul | options below, Your search<br>ts. |
| Address:   | lo. Enter                                     | Street. Suburb or ID              |
| For:       | Sale 💌 1                                      | ype: Residential 💌                |
| Features:  |   |                                   |
| From \$:   | 1   | lo \$:                            |
| Order:     | By Suburb                                     |                                   |
| 1          | Search  | Advanced Search                   |
| • Add a Pr | operty  |                                   |
| • Add a Pr | oject / Devel                                 | opment                            |

#### 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 <u>convert to appraisal</u> 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 : C     | reate                              |                  |          | • 4 |
|---------------------|------------------------------------|------------------|----------|-----|
| Step 1 of 2 - Comp  | lete Prospect Information          |                  |          |     |
| Prospect Agents     | & Contacts                         |                  |          |     |
| - :: Prospect Prope | nty ::                             |                  |          |     |
| Status:             | Prospect                           | For Sale/Rental: | For Sale | -   |
| Type: *             | Residential                        | 1                |          | E   |
| 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)<br>Sydenham (3037) | -                |          |     |
|                     | <b>Syd</b> ney (2000)              | N                | ISW      |     |
| Google Map:         | Re-Position Marker                 |                  |          |     |

5. Click Save and Proceed and assign any related contacts or agents.

- $_{\odot}$  Select role from drop down
- $_{\odot}$  Type Agent name and select from results.
- Click Add, to insert as selected agent.

| Step 2 of 2 - Speci | y Agents & Contacts related to this pro | operty transaction      |
|---------------------|---|-------------------------|
| rospect Agents      | & Contacts                              |                         |
| :: Assign related i | Igents ::                               |                         |
| Role:               | Listing Agent                           | (uncheck to de-select)  |
| Agent:              | joh Add                                 | designed to be a set of |
| Selected Agents:    | John Smith (Listing Agent)              |                         |
|                     | Add New Staff                           |                         |
|                     |   |                         |
|                     | -                                       |                         |
| Appear on Site:     |   |                         |
|                     |   |                         |
|                     |   |                         |
|                     |   |                         |
|                     |   |                         |

- 6. Click Finish
- 7. 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.

| Prospect : #2         | - 54 Burns Rise, SYD   | NEY (2000)              |          | Full View |
|-----------------------|--|-------------------------|----------|-----------|
| Prospect Agents &     | Contacts   |                         |          |           |
| -:: Prospect Property | 1::  |                         |          |           |
| Status:               | billion and a station of the station | For Sale/Rental:        | For Sale | •         |
| Type; *               | Prospect<br>Convert to Appraisal   |                         |          |           |
| Category: *           | Cancelled/Missed   |                         |          |           |
| Property Name:        |  |                         |          |           |
| Level No.:            | Unit No.;  | Street No.:             | 54       |           |
| Street Name: *        | Burns  | Street Type: *          | Rise     |           |
| Suburb: *             | SYDNEY (2000)  | State: *                | NSW      | •         |
| Address Format:       | 54 Burns Rise  |                         |          |           |
|                       | Tick to edit address f   | or your web display for | mat.     |           |
| Google Map:           | Re-Position Marker   |                         |          |           |
|                       | Save   |                         |          |           |

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.

| Available  | Inspections                                   | Off Market                        |
|------------|---|-----------------------------------|
|            | rd or fill in property<br>/our property resul | options below, Your search<br>ts. |
| Address:   | lo. Enter                                     | Street. Suburb or ID              |
| For:       | Sale 💌 1                                      | ype: Residential 💌                |
| Features:  |   |                                   |
| From \$:   | 1   | lo \$:                            |
| Order:     | By Suburb                                     |                                   |
| 1          | Search  | Advanced Search                   |
| • Add a Pr | operty  |                                   |
| • Add a Pr | oject / Devel                                 | onment                            |

#### 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, <u>convert to listing</u>, or <u>cancelled/missed</u> 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 <u>letter templates</u>.

**Price To(\$):** - Numeric value only, field can be used as variables in <u>letter templates</u>.

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 <u>letter templates</u>

**Appraisal For:** - Internal reference and/or reporting Select from drop down, field can be used as variables in <u>letter templates</u>

**Property Condition:** - Internal reference and/or reporting Select from drop down, field can be used as variables in <u>letter templates</u>

Sale Method: - This will copy if converted to a listing, field can be used as variables in <u>letter templates</u> 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)
Carports: - 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 :   | and the second second  |   |  | 06   |
|---|--|---|--|------|
| Step 1 of 3 - Com   | plete Appraisal Inform   | nation                                  |  |      |
| Appraisal Age   | ts & Contacts Custo  | m Info Resources                        |  |      |
| Car Spaces:<br>Land Size:<br>External Area:<br>Construction:<br>Aspect: | Area (so   |   | aces: Area (s  | 0.00 |
| Features:   | Air Conditioni<br>Alarm Syster<br>Area Views<br>Beach Front<br>Built-In Ward<br>Bush Retreat | n Oce<br>Ope<br>Pen<br>Pets Pets<br>Poo | Installed<br>ean Views<br>en Fire Place<br>hthouse<br>s Allowed<br>ol<br>stige Homes | *    |
| Tenanted?:  | Theck if the   | is is a Tenanted Property               |  | E    |

- 5. Click Save and Proceed and assign any related contacts or agents.
  - $_{\rm O}$   $\,$  Select role from drop down
  - $_{\odot}$  Type Agent name and select from results.
  - $_{\odot}$   $\,$  Click Add, to insert as selected agent.
  - $_{\odot}$   $\,$  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.

|            |                   | 1                  | to this property transac |                        |
|------------|-------------------|--------------------|--------------------------|------------------------|
| oppraisal  | Agents & Contacts | Custom Info        | Resources                |                        |
| -:: Assign | related Agents :: |                    |                          | 1                      |
| Role:      | Listing Ag        | ent 🔻              | 3                        | (uncheck to de-select) |
| Agent:     | john              |                    | Add                      |                        |
| Selected   | Agents: Add News  | th (Listing Agent) |                          |                        |
|            |                   |                    |                          |                        |
|            |                   |                    |                          |                        |
|            |                   |                    |                          |                        |
|            | n Site:           |                    |                          |                        |
| Appear     |                   |                    |                          |                        |
| Appear o   |                   |                    |                          |                        |
| Appear     |                   |                    |                          |                        |

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
- $_{\odot}$  Enter a title for this information e.g. notes for copy
- $_{\odot}$   $\,$  Enter notes in the custom field that has become available

| tep 3 of 4 - | Edit Appraisal Cus | tom Information |           |                  |  |
|--------------|--------------------|-----------------|-----------|------------------|--|
| ppraisal     | Agents & Contacts  | Custom Info     | Resources |                  |  |
| Add Custo    | en loñe            |                 |           |                  |  |
| : Appraisa   | Custom Info ::     |                 |           | 1                |  |
| Notes for C  | opy Enter th       | e notes here.   |           |                  |  |
|              |                    |                 |           |                  |  |
|              |                    |                 |           |                  |  |
|              |                    |                 |           |                  |  |
|              |                    |                 |           |                  |  |
|              |                    |                 |           |                  |  |
| « Previou    | s Step             |                 |           | Save & Proceed » |  |
| « Previou    | s Step             |                 |           | Save & Proceed » |  |

7. Click Save & Proceed to upload any Resources

| :: Listing | g:#1P0007-1.           | Jones Boule   | evard, Copacabana   |   |
|------------|------------------------|---|---|---|
| Step 4 of  | 4 - Upload Property Pl | notos and relate  | ed Resources  |   |
| Appraisal  | Agents & Contacts      | Custom Into   | Resources   |   |
| Property P | hotos   Floorplans     | Documents   | Links   |   |
| Enoto(s    | dimensions             | s of that photo an<br>Property Ph<br>These are the<br>click, hold an<br>appear. To ch<br>On rollover of | ading High Res images, not exceed 5MB, and the me<br>te no smaller than 800px wide x 600px high.<br>otos<br>a property images that are attached to this property. S<br>id drag the property photos into the order you would li-<br>nange the 'Main Photo' simply drag a sub image into i<br>an image you will see a symbol appear in the bo<br>Simply click it to view an enlarged image. | Simply single<br>ike them to<br>image slot 1. |
| « Previ    | ous Step               |   | Finis   | sh  |

### 8. Click Finish

9. You can now start using all property action icons or view the <u>notes history</u>, <u>recent enquiries</u>, property <u>history</u>, <u>modification logs</u> or <u>conduct a CMA</u> from the left panel.

| 🏠 Appraisal - ID#1P0007                   | :: Appraisal : #1     | P0007 - 1 Jones Bou      | levard, COPACAB        | ANA (2251) | . 8       |
|---|-----------------------|--------------------------|------------------------|------------|-----------|
| < Back to Properties                      |                       | P 2 0 1                  | 1 🖻 🕥 🎠                | 1 2 6      | Full View |
| ∽ Notes History                           | Appraisal Agents &    | Contacts Custom Info     | Resources              |            |           |
| There are no Notes recorded at this time. | -:: Property to Appra | ilse ::                  |                        |            |           |
|   | Status:               | Appraisal                | For Sale/Rental:       | For Sale   |           |
|   | Type: *               | Residential              | ]                      |            | III       |
|   | Category: *           | House                    |                        |            |           |
|   | Property Name:        |                          | ]                      |            |           |
|   | Level No.;            | Unit No.:                | Street No.:            | 1          |           |
|   | Street Name: *        | Jones                    | Street Type: *         | Boulevard  |           |
| > Recent Enquiries                        | Suburb: *             | COPACABANA (2251)        | State: *               | NSW        |           |
| > Property History                        | Address Format:       | 1 Jones Boulevard        |                        |            |           |
|   |                       | Tick to edit address for | r your web display for | mat.       |           |
| > Property Modifications Log              | Google Map:           | Re-Position Marker       |                        |            | 4         |
| > Links to Portals                        |                       | Save                     |                        |            |           |
| > Help Text                               |                       |                          |                        |            |           |

## **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 diferentiate 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.

| :: Apprai                                     | sal : #1   | P0007 -   | 1 Jones B                     | oule  | ward, COPACAB        | ANA (2251) |      | 08   |
|---|------------|-----------|-------------------------------|-------|----------------------|------------|------|------|
| # 0   |            |           | ) 🔊 🛛                         | 1     |                      | 1 2 0      | Full | View |
| Appraisal                                     | Agents &   | Contacts  | Custom Info                   | R     | esources             |            |      |      |
| -:: Property                                  | y to Appra | iise ::   |                               | _     |                      |            | 1    | *    |
| Status:<br>Type: *<br>Category:<br>Property N |            | Convert   |                               |       | For Sale/Rental:     | For Sale   |      | III  |
| Level No.:                                    |            |           | Unit No.:                     |       | Street No.:          | 1          |      |      |
| Street Na                                     | me: *      | Jones     |                               |       | Street Type: *       | Boulevard  | •    |      |
| Suburb:*                                      |            | COPACA    | BANA (2251)                   |       | State: *             | NSW        |      |      |
| Address F                                     | ormat      | 1 Jones I | Boulevard                     | -     |                      |            |      |      |
| Google M                                      | ap:        |           | o edit addres<br>ition Marker | s for | your web display for | mat.       |      | +    |
|   |            | Tick t    | o edit addres                 | s for | your web display for | mat.       |      |      |

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 <u>left property panel</u>. \*Note: if you are unable to see this button please contact a Master user in your office and get them to check your <u>permissions</u>.

| 合 Prop                              | erties   |
|-------------------------------------|--|
| Available                           | Inspections Off Market   |
|                                     | rd or fill in property options below. Your search<br>your property results.                                  |
| For: [<br>Features: [<br>From \$: [ | Io. Enter Street. Suburb or ID<br>Sale Type: Residential<br>To \$:<br>By Suburb<br>Search<br>Advanced Search |
| • Add a Pr                          | operty   |
| • Add a Pr                          | oject / Development  |
| • Add an A                          | ppraisal / Prospect Property   |

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

| :: Listin             | ig : Crea | ate      |               |                       |                    |                | 9 6       |
|-----------------------|-----------|----------|---------------|-----------------------|--------------------|----------------|-----------|
| Step 1 of             | 6 - Compl | ete Gene | eral Informa  | tion                  |                    |                |           |
| General<br>Suburb: *  | For Sale  |          | Features      | Open Homes<br>State   | Agents & Contacts  |                |           |
| Hide Add              |           | Tic      |               | e address on you      | 110                | »vv            |           |
| Address F<br>Google M |           |          | ctoria Street | and the second second | eet View 🔲 Hide "V | What's around" |           |
| Key to Pr             | -         | Re-P     | Osition Mark  |                       | erty Key No.: 14   | vnats around   |           |
| Access De             | etails.:  | Conta    | ct owner      |                       |                    |                | E         |
| 1                     |           | F        |               |                       |                    | 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

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

**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:** (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

| :: Listin | g:#1P0       | 008 - 654     | Victoria St      | reet, Sydney      |            | 00 |
|-----------|--------------|---------------|------------------|-------------------|------------|----|
| Step 3 of | 6 - Complet  | te Features a | and Description  |                   |            |    |
| General   | For Sale     | Features      | Open Homes       | Agents & Contacts | Resources  |    |
| Select Co | ру:          | Website &     | Enews 💌          |                   |            | ŕ  |
| Main Hea  | dline:       | Enter the He  | eadline          |                   |            |    |
|           |              |               |                  |                   |            | E  |
|           |              | Characters    | typed in so far: | 18 (max = 150 ch  | aracters)  |    |
| Property  | Description: | And Propert   | y Description    | 1                 |            |    |
|           |              | 1.1           |                  |                   |            |    |
|           |              |               |                  |                   |            |    |
|           |              |               |                  |                   |            |    |
|           |              | Characters    | typed in so far: | 24 (max = 2500 c  | haracters) |    |
| Bedroom   | 5:           |               | diser in sector. | Bathrooms:        |            |    |

- 7. Click Save and Proceed to add in inspections times
  - $_{\rm O}$   $\,$  Select the Date and time and click Add Open Time  $\,$
  - $_{\rm O}$   $\,$  or Select the Type from the Open Type drop down

|                      | a shared | eleen denie                  | Inspection Time | F1                |           |                           |
|----------------------|----------|------------------------------|-----------------|-------------------|-----------|---------------------------|
| Seneral              | For Sale | Features                     | Open Homes      | Agents & Contacts | Resources |                           |
| Open Dat<br>Open Typ |          | 11 2011                      | Open F          | rom: 10 💌 00 💌    |           | [00 💌 [PM]∞]<br>Open Time |
|                      |          | tion Times ::<br>has been en |                 |                   |           |                           |

- 8. Click Save and Proceed and assign any related contacts or agents.
  - $_{\rm O}$   $\,$  Select role from drop down
  - $_{\odot}$   $\,$  Type Agent name and select from results.

- Click Add, to insert as selected agent.
- $_{\odot}$   $\,$  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.

| ppraisal  | Agents & Contacts | Custom Info                     | Resources |                        |  |
|-----------|-------------------|---------------------------------|-----------|------------------------|--|
| :: Assign | related Agents :: | -                               |           | 11                     |  |
| Role:     | Listing A         | gent 💌                          | 1         | (uncheck to de-select) |  |
| Agent:    | john              |                                 | Add       |                        |  |
| Selected  | Agents: Add Nev   | nith (Listing Agent)<br>v Staff |           |                        |  |
|           |                   |                                 |           |                        |  |
|           |                   |                                 |           |                        |  |
|           |                   |                                 |           |                        |  |
| A         | n Citer           |                                 |           |                        |  |
| Appear o  | n Site:           |                                 |           |                        |  |
| Appear o  | n Site:           |                                 |           |                        |  |

\*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.

| :: Listin | ig:#1P0     | 008 - 654   | Victoria Str      | eet, Sydney           |              |                    |   |
|-----------|-------------|-------------|-------------------|-----------------------|--------------|--------------------|---|
| Step 5 of | 6 - Specify | Agents & Co | ntacts related to | this property transac | tion         |                    |   |
| General   | For Sale    | Features    | Open Homes        | Agents & Contacts     | Resources    |                    |   |
|           |             |             |                   |                       |              |                    | * |
|           |             | Ļ           |                   |                       |              | 4                  |   |
| -         |             |             |                   |                       |              |                    |   |
|           | related Co  |             |                   |                       |              |                    | _ |
| Role:     |             | Vendor      | -                 | -                     | (unc         | heck to de-select) |   |
| Contact   |             | Saman       | Jones (Vendor)    | Add                   | samantha@hot |                    |   |
| Selecte   | d Contacts: | Add New C   |                   |                       | samantha@hot | man.com            |   |
|           |             |             |                   |                       |              |                    |   |
|           |             |             |                   |                       |              |                    |   |
|           |             | ÷           |                   |                       |              |                    |   |
| « Prev    | ious Step   | 1           |                   |                       |              | Save & Proceed »   |   |
|           |             |             |                   |                       |              |                    | + |

9. Click Save & Proceed to upload any Resources

| arch + or + | - Upload Property Ph | hotos and relate  | ed Resources   |  |
|-------------|----------------------|---|--|--|
| Appraisal   | Agents & Contacts    | Custom Into   | Resources  |  |
| Property Ph | otos   Floorplans    | Documents   | Links  |  |
| Photo(s) I  | dimensions           | s of that photo ar<br>Property Ph<br>These are the<br>click, hold an<br>appear. To ch<br>On rollover of | bading High Res images, not exceed 5MB, and the minimum<br>re no smaller than 800px wide x 600px high.<br>notos<br>e property images that are attached to this property. Simply single<br>nd drag the property photos into the order you would like them to<br>hange the 'Main Photo' simply drag a sub image into image slot 1.<br>f an image you will see a <b>Q</b> symbol appear in the bottom right<br>Simply click it to view an enlarged image. |  |

- 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 <u>General Property Tab.</u> 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 <u>General Property Tab</u> then click save.

| :: Listin   | g:ID#1P           | 0008 - 6  | 54 Victoria | Street, Sydn                              | ney      |                     |            |                          |
|---|-------------------|---|-------------|---|----------|---------------------|------------|--------------------------|
| # 0   | -                 |   | ۵ 🛛 I       |   | T        | 9                   | á          | Full View                |
| General   | For Sale          | Features  | Open Homes  | Agents & Con                              | itacts R | esources            | Commission |                          |
| Status:<br>For Sale/F<br>Type: *<br>Category:<br>Investmen<br>Sale Meth<br>Authority:<br>Property N | *<br>nt?:<br>nod: | Offline<br>Available<br>Exchanged<br>Sold/Settled<br>Offline<br>Under Contri<br>Private Trea<br>Exclusive | act         |   |          |                     |            | s Property<br>eview Link |
| Level No.:<br>Street Nar<br>Suburb: *   |                   | Victoria<br>SYDNEY (2)<br>Save  | nit No.:    | Street No.:<br>Street Type: *<br>State: * |          | 54<br>Street<br>NSW |            |                          |

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

|   |         |     |               | 1                    |            |
|---|---------|-----|---------------|----------------------|------------|
|   |         |     |               |                      | ban<br>web |
| ĺ |         |     |               |                      | disp       |
|   |         |     |               |                      | pag        |
|   | Settled | n/a | For Sale Only | The sale has settled | con        |
|   |         |     |               |                      | ban        |
|   |         |     |               |                      | web        |

## **Property Resources**

## **Property Resources**

Property Resources include:

- o Property photos
- o <u>Floorplans</u>
- o **Documents** 
  - Agency Agreement
  - Property Contract
  - Sustainability Declaration
  - Other Documents
- o <u>Links</u>
  - 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.

|            |                       | Construction of | 621                                   |               | Constants | Dessurers      | T assessment and a sec                 | 1              |
|------------|-----------------------|-----------------|---------------------------------------|---------------|-----------|----------------|--|----------------|
| General    | For Sale              | Features        | Open Homes                            | Adeute a      | Contacts  | Resources      | Commission                             |                |
| Property I | Photos   Flo          | oorplans   D    | locuments   Lin                       | ks            |           |                |  |                |
| Distance   | and the second second |                 |                                       | ing High Do   | imagaa n  | ot avoard 5ME  | and the minimu                         | -              |
| Photo(     | s) Upload             |                 | of that photo are r                   |               |           |                | 3, and the minimu<br>high.             | U.             |
| : Main Pl  | hoto ::               |                 |                                       |               |           |                | -                                      |                |
|            |                       |                 | Property Photo                        | )S            |           |                |  | and the second |
|            |                       |                 |                                       |               |           |                | s property. Simpl                      |                |
|            |                       |                 |                                       |               |           |                | you would like the<br>image into image |                |
|            |                       |                 |                                       |               |           |                |  |                |
|            |                       |                 | On rollover of an<br>hand corner. Sir |               |           |                | ear in the bottom                      | right          |
| -          |                       |                 | Hand comer. on                        | npry enert it | to new an | eniargea inage |  |                |
|            | otos ::               |                 |                                       |               |           |                |  |                |
| -" All Ph  |                       |                 |                                       |               |           |                |  |                |

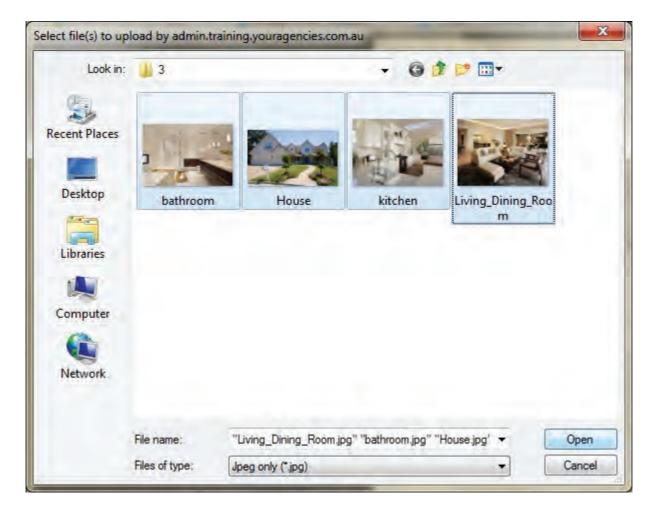
#### 3. Click Browse

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.

•

| Browse Files     |                  |        |
|------------------|------------------|--------|
|                  | Overall progress |        |
|                  |                  | 0%     |
|                  | File Progress    |        |
|                  |                  | 0%     |
|                  |                  | _      |
| Clear List       |                  | Upload |
| elected Files :: |                  |        |
|                  |                  |        |

- 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

|   | 4                      |
|---|------------------------|
| Overall Progress (1.8 MB  | 7%                     |
| File Progress "bathroom.jp  |                        |
| Upload with 132.8 kB/s. Time left   | 78%                    |
| Clear List  | Uploād                 |
|   |                        |
| The second se | 157.9 kB               |
| bathroom.jpg<br>House.jpg   | 157.9 kB 1<br>1.1 MB 1 |
|   |                        |

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.

|                     |   | i 🖹 🖄 🥼 📊  | 10  | Full View                  |
|---------------------|---|--|---|----------------------------|
| Seneral For Sale Fe | atures Open Homes   | Agents & Contacts Res  | ources Commissi   | on                         |
|                     | Click, hold and d<br>appear. To chan<br>On rollover of an | operty images that are attach<br>lrag the property photos into t<br>ge the 'Main Photo' simply dr<br>image you will see a <b>Q</b> syn<br>nply click it to view an enlarge | he order you would lil<br>ag a sub image into in<br>nbol appear in the bo | ke them to<br>mage slot 1. |
| -:: All Photos ::   | 3.  | 4.   | ×   |                            |

## Floorplans

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

- 1. <u>Search for your Property</u> and open the <u>Resources Tab</u> on the <u>Property Card</u>
- 2. Click on Floorplans on the sub resources tab

| # @        |                          |             | 6             |                                  |            | all        | 2     | 5                | Full Viev |
|------------|--------------------------|-------------|---------------|----------------------------------|------------|------------|-------|------------------|-----------|
| General    | For Sale                 | Features    | Open Hom      | es Agents                        | & Contacts | Resou      | irces | Commission       |           |
| property I | <sup>o</sup> hotos   Fla | orplans   D | ocuments      | Links                            |            |            |       | -                | -         |
| .: All Flo | orplans ::               | _           |               |                                  |            |            |       |                  |           |
|            |                          |             |               |                                  |            |            |       |                  |           |
| -          |                          | A floorpla  | in must be up | loaded in .pdf                   | format and | may not ex | xceed | 5MB in filesize. |           |
| -          | an(s) Upload             |             |               | loaded in .pdf<br>r plans one pa |            |            | xceed | 5MB in filesize. |           |
| -          |                          |             |               |                                  |            |            | xceed | 5MB in filesize. |           |
| Floorpl    |                          |             |               |                                  |            |            | xceed | 5MB in filesize, |           |
| -          |                          |             |               |                                  |            |            | xceed | 5MB in filesize. |           |
| Floorpl    |                          |             |               |                                  |            |            | xceed | 5MB in filesize. |           |
| Floorpl    |                          |             |               |                                  |            |            | xceed | 5MB in filesize. |           |

#### 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.

| Browse Files    |                  |        |
|-----------------|------------------|--------|
|                 | Overall progress |        |
|                 |                  | 0%     |
|                 | File Progress    |        |
|                 |                  | 0%     |
|                 |                  |        |
| Clear List      |                  | Upload |
| lected Files :: |                  |        |

4. Click on Browse Files

| Look in:      | 🃙 654 Victoria | St, Sydney                 | - 91        | 1 🖻 🔛    |        |
|---------------|----------------|----------------------------|-------------|----------|--------|
| (Pa)          | Name           | *                          | Туре        | S        | ize    |
| and the       | Agency Ag      | reement                    | Adobe Acros | bat D    | 19 KB  |
| Recent Places | Floorplan      |                            | Adobe Acros | oat D    | 133 KB |
| 100           | Property C     | ontract                    | Adobe Acrob | oat D.,, | 18 KB  |
| Desktop       | Sustainabil    | ity Declaration            | Adobe Acrol | oat D    | 20 KB  |
| Libraries     |                |                            |             |          |        |
|               |                |                            |             |          |        |
| Computer      |                |                            |             |          |        |
|               |                |                            |             |          |        |
| Network       |                | -                          |             |          | _      |
|               | File name:     |                            |             | *        | Open   |
|               | Files of type: | Plan file (*.gif, *.jpg, * | 10          | •        | Cancel |

#### 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.

| Look in:   | 📕 654 Victoria | a St. Sydney      | + Q        | 1 🛤 🖽    |        |
|--|----------------|-------------------|------------|----------|--------|
| 0  | Name           | *                 | Туре       | Si       | ze     |
| and the second s | Agency Ag      | greement          | Adobe Acro |          | 19 KB  |
| Recent Places  | Floorplan      |                   | Adobe Acro | bat D.,. | 133 KB |
|  | Property C     | Contract          | Adobe Acro |          | 18 KB  |
| -  | 🔁 Sustainabi   | ility Declaration | Adobe Acro | bat D.,. | 20 KB  |
| Libraries<br>Computer  |                |                   |            |          |        |
|  |                |                   |            |          |        |
| Network  | File name:     | Floorplan         |            |          | Open   |

- 6. Click on Open
- 7. The Floorplan will appear on screen

0

| Querell Proces   | (422 7 LB)      |
|------------------|-----------------|
| Overall Progr    | ress (132.7 kB) |
|                  | 0%              |
| File Pr          | rogress         |
|                  | 0%              |
| Clear List       | Upload          |
| elected Files :: |                 |
|                  | 132.7 kB        |

- 8. Click on Upload
- 9. Floorplan will upload

| dam a service            | And a state      |
|--------------------------|------------------|
| Overall Progress         | (132.7 kB)       |
|                          | 18%              |
| File Progress "Floo      | orplan.pdf"      |
|                          | 18%              |
| Upload with 158.2 kB/s.1 | lime left: ~1sec |
| Clear List               | Upload           |
| elected Files ::         |                  |
| Floorplan.pdf            | 132.7 kB 🖾       |

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

| :: Listin | ng : #1P0   | 008 - 654   | Victor  | ia Stree    | et, Sydr     | ney                         |                  | • •       |
|-----------|---|-------------|---------|-------------|--------------|-----------------------------|------------------|-----------|
| H C       |   | 1           | 61      | 2 🖬         |              |                             | 120              | Full View |
| General   | For Sale  | Features    | OF      | Agents & C  | Contacts     | Resources                   | Commission       |           |
| Property  | Photos   Flo                                      | orplans   D | ocument | s   Links   |              |                             |                  |           |
| Floorp    | oorplans ::<br>lan(s) Upload<br>Floorplan.pdf   L | Upload n    | view    | floor plans | in .pdf forr | nat and may n<br>at a time. | ot exceed 5MB in | filesize. |

10. Click on Save

#### Documents

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

1. <u>Search for your Property</u> and open the <u>Resources Tab</u> on the <u>Property Card</u>

2. Click on Documents on the sub resources tab

| :: Listin  | g:#1P0   | 008 - 654    | Victoria St       | reet, Sydne     | y             |            |            | 0         |
|------------|--|--------------|-------------------|-----------------|---------------|------------|------------|-----------|
| # 0        |  |              | o 🛛 🕯             |                 | <b>P</b> . al | 51         | 5          | Full View |
| General    | For Sale   | Features     | Open Homes        | Agents & Co     | ntacts Re     | sources    | Commission |           |
| Property I | Photos   Fl  | oorplans   E | ocuments   Lir    | ıks             |               |            |            |           |
| Agree      | ry Agreeme<br>ment Upload<br>rty Contract<br>ract Upload | Please e     | nsure that a docu |                 |               |            |            |           |
| Cont       | act unioau   | 1 10000 0    |                   | inform dood not | oncood onne   | ni niooneo | 4          |           |

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

0

| Browse Files     |                  |        |
|------------------|------------------|--------|
|                  | Overall progress |        |
|                  |                  | 0%     |
|                  | File Progress    |        |
|                  |                  | 0%     |
| Clear List       |                  | Upload |
| elected Files :: |                  |        |

#### 4. Click on Browse Files

| Look in:   | Agentbox             |                   | + Q        | 🕸 🏴 🖽 | -     |
|--|----------------------|-------------------|------------|-------|-------|
| (Fa)   | Name                 | *                 | Туре       | Si    | ze    |
| and the second s | Agency Agency Agency | greement          | Adobe Acro | bat D | 19 KB |
| ecent Places   | Property C           | Contract          | Adobe Acro | bat D | 18 KB |
|  | Sustainabi           | ility Declaration | Adobe Acro | bat D | 20 KB |
| Desktop  |                      |                   |            |       |       |
| -  |                      |                   |            |       |       |
| Libraries  |                      |                   |            |       |       |
|  |                      |                   |            |       |       |
| Computer   |                      |                   |            |       |       |
| 6  |                      |                   |            |       |       |
| Network  |                      |                   |            |       | -     |
|  | File name:           | Agentbox          |            |       | Open  |
| 1. Service   | rile name.           | 1 Genne ein       |            |       |       |

5. Select Document from your file

| Look in:                        | 📕 Agentbox   |                   |         | 3 🗊 📁 🔛     |       |
|---------------------------------|--------------|-------------------|---------|-------------|-------|
| Pa                              | Name         | *                 | Туре    | Si          | ze    |
| 2                               | Agency Ag    | greement          | Adobe A | crobat D    | 19 KB |
| Recent Places                   | Property C   |                   | Adobe A | crobat D.,, | 18 KB |
| 100                             | 🔁 Sustainabi | ility Declaration | Adobe A | crobat D    | 20 KB |
| Desktop                         |              |                   |         |             |       |
| -                               |              |                   |         |             |       |
|                                 |              |                   |         |             |       |
| Libraries                       |              |                   |         |             |       |
|                                 |              |                   |         |             |       |
|                                 |              |                   |         |             |       |
| Computer                        |              |                   |         |             |       |
| Computer                        |              |                   |         |             |       |
| Computer                        |              |                   |         |             |       |
| Computer<br>Computer<br>Network | File name:   | Agency Agreement  |         |             | Open  |

- 6. Click on Open
- 7. The Document will appear in a list on screen

| Jan Sugar in      |             |
|-------------------|-------------|
| Overall Progress  | s (18.3 kB) |
|                   | 0%          |
| File Progr        | ess         |
|                   | 0%          |
| Clear List        | Upload      |
| Selected Files :: |             |
|                   | 18.3 kB     |

8. Click on Upload

0

|                  | Overall Progre        | no (19 2 kD)         |        |
|------------------|-----------------------|----------------------|--------|
|                  | overall Progre        | 55 (10.3 KD)         | 070    |
|                  | i A Maria and America | and the second state | 97%    |
|                  | File Progress "Agenc  | y Agreement.pdf"     |        |
|                  | Upload cor            | and and              | 97%    |
|                  | opiosa con            | inprotes.            |        |
| Clear List       |                       |                      | Upload |
| elected Files :: |                       |                      |        |
|                  |                       |                      |        |
|                  |                       |                      |        |

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

| :: Listing : #1P0008 - 654 Victoria Street, Sydney  | 08        |
|---|-----------|
|   | Full View |
| General For Sale Features OFI Agents & Contacts Resources Commission  |           |
| Property Photos   Floorplans   Documents   Links  |           |
| 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 ::<br>Declaration Upload Please ensure that a document does not exceed 5MB in filesize.   |           |
| Comment(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. <u>Search for your Property</u> and open the <u>Resources Tab</u> on the <u>Property Card</u>
- 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

| :: Listin  | g:ID#1F  | 0001 - 1     | Jone     | s Stree  | et, Copaca    | abana      |          |           |             | . 3       |
|------------|----------|--------------|----------|----------|---------------|------------|----------|-----------|-------------|-----------|
| # 0        |          |              | 6        |          |               |            |          | 6         |             | Full View |
| General    | For Sale | Features     | OFI      | Agents   | & Contacts    | Resourc    | es Con   | nmission  |             |           |
| Status:    |          | Available    |          | -        |               |            |          | 1         | -500        | 12.       |
| For Sale/I | Rental:  | For Sale     |          |          |               |            |          |           | - YAL       |           |
| Type: *    |          | Residential  | ·        | •        |               |            |          |           | - Alexan    |           |
| Category:  | *        | House        |          | -        |               |            |          |           | Copy This P | TODOTTY   |
| Investmen  | nt?:     |              |          |          |               |            |          |           | Vendor Prev |           |
| Sale Meth  | nod:     | Private Trea | ty       | -        |               |            |          |           |             |           |
| Authority: |          | Exclusive    |          | •        |               |            |          |           |             |           |
| Property I | Name:    |              |          |          |               |            |          |           |             |           |
| Level No.  | :        | U U          | nit No.: |          | Street No.:   |            | 1        |           |             |           |
| Street Na  | me: *    | Jones        |          |          | Street Type   | e: *       | Street   |           | -           |           |
| Suburb: *  |          | COPACABA     | NA (225  | 51)      | State: *      |            | NSW      |           |             |           |
| Hide Add   | ress?:   | Tick to h    | ide the  | address  | on your we    | b site.    |          |           |             |           |
|            |          | Tick to e    | dit add  | ress for | your web dis  | play forma | at.      |           |             |           |
| Address F  | ormat:   | 1 Jones Str  | eet      |          |               |            |          |           |             |           |
| Google M   | ap:      | Re-Positio   | n Marke  | ПП       | ide Street Vi | ew 🗆 Hid   | de "What | s around' |             |           |
| 0 · 6      |          |              |          |          |               |            |          |           |             | 7         |
|            |          | Save         |          |          |               |            |          |           |             |           |
|            |          |              | 26 -     |          |               |            |          |           |             |           |

2. Click on the OFI tab

| :: Listin  | ng:#1P0       | 001 - 1 Jo    | ones S | treet, Co   | pacaba  | ina      |        |          | •         |
|------------|---------------|---------------|--------|-------------|---------|----------|--------|----------|-----------|
| # Q        |               |               | 9      |             |         |          | all 4  | à        | Full View |
| General    | For Sale      | Features      | OFI    | Agents & Co | ontacts | Resource | es Con | nmission |           |
| Open Da    | te: 24        | 11 2011       |        | Open From   | : 10 -  | 00 -     |        | 10 -     | 00 - PM-  |
| Open Tyj   | pe:           |               | F      |             |         |          |        | Add O    | pen Time  |
| Г:: Upco   | ming Inspect  | tion Times :: | -      |             |         |          |        |          |           |
| No insp    | ection data l | has been en   | tered. |             |         |          |        |          |           |
| -:: Past I | nspections :  |               |        |             |         |          |        |          |           |
| No insp    | ection data   | has been en   | ered.  |             |         |          |        |          |           |
|            |               |               |        |             |         |          |        |          |           |
|            |               |               |        |             |         |          |        |          |           |
|            |               |               |        |             |         |          |        |          |           |
|            |               |               |        |             |         |          |        |          |           |
|            |               |               |        |             |         |          |        |          |           |
| 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                      | . 8       |
|--------------------------------------|---|-----------|
| ₩@∎⊇₽☆◇                              |   | 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        |
| Open Type:                           | Add Open T                              | ime       |
| - :: 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    |             |               |           |
|--------------------------|-----------------|---------------|-------------|---------------|-----------|
|                          | 2 o 🛛 🛛         |               | ₽           | ã             | Full View |
| General For Sale Feature | res OFI Agents  | & Contacts Re | sources Com | mission       |           |
| Open Date: 07 12 2       | 2011 Open F     | rom: 10 💌 00  | ▼ AM ▼ To:  | 10 - 30 - A   | M         |
| Open Type:               |                 | M             |             | Add Open Time |           |
| C Past Inspections ::    | n entered.      |               |             |               | 7         |
| 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

| :: Listin   | g:ID#1F  | 0001 - 1     | Jone     | s Stree  | et, Copaca    | abana     |         |           |       |           | 98        |
|-------------|----------|--------------|----------|----------|---------------|-----------|---------|-----------|-------|-----------|-----------|
| # @         |          |              | 6        |          |               |           | 1       | 2         | 1     | -         | Full View |
| General     | For Sale | Features     | OFI      | Agents   | & Contacts    | Resour    | ces (   | Commis    | sion  |           |           |
| Status:     |          | Available    |          | -        |               |           |         |           |       | An        |           |
| For Sale/I  | Rental:  | For Sale     |          | Ŧ        |               |           |         |           |       | -Ya       |           |
| Type: *     |          | Residential  | -        |          |               |           |         |           | 18    | - MATT    |           |
| Category:   | *        | House        |          |          |               |           |         |           |       | Copy This | Property  |
| Investmer   | nt?:     |              |          |          |               |           |         |           |       | endor Pre |           |
| Sale Meth   | od:      | Private Trea | ty       | -        |               |           |         |           |       |           |           |
| Authority:  |          | Exclusive    | _        |          |               |           |         |           |       |           |           |
| Property I  | Name:    |              |          |          |               |           |         |           |       |           |           |
| Level No.   |          | U            | nit No.: |          | Street No.:   |           | 1       |           |       |           |           |
| Street Na   | me: *    | Jones        |          |          | Street Type   | e: *      | Stre    | et        |       | F         |           |
| Suburb: *   |          | COPACABA     | NA (22   | 51)      | State: *      |           | NSV     | V         |       | •         |           |
| Hide Add    | ess?:    | Tick to h    | ide the  | address  | on your we    | b site.   |         |           |       |           |           |
|             |          | Tick to e    | dit add  | ress for | your web dis  | play form | nat.    |           |       |           |           |
| Address F   | ormat:   | 1 Jones Str  | eet      |          |               |           |         |           |       |           |           |
| Google M    | ap:      | Re-Positio   | n Marke  | 🗖 🗆 н    | ide Street Vi | ew 🗆 H    | ide "Wi | nat's arc | ound" |           |           |
| $w \to \pi$ | 17       |              |          |          |               |           |         |           |       |           | *         |
|             |          | Save         |          |          |               |           |         |           |       |           |           |

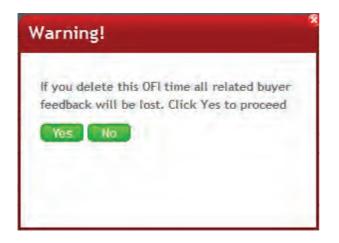
#### 2. Click on the OFI tab

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.

| :: Listir   | ng:#1P0       | 001 - 1 Jo    | ones Sti  | reet, Co   | pacaba  | ana     |      |        |             | 0         |
|-------------|---------------|---------------|-----------|------------|---------|---------|------|--------|-------------|-----------|
| # Q         |               |               | <u>ا</u>  | 2 🖬        |         |         | ail  | 2      | 3           | Full View |
| General     | For Sale      | Features      | OFI #     | igents & C | ontacts | Resourc | es ( | Commis | sion        |           |
| Open Dat    | e: 07 1       | 12 2011       |           | pen From   | n: 10 - | 00 -    | AM   | To: 10 | 30 -        | AM        |
| Open Typ    | e:            |               |           |            |         |         |      | -      | Add Open Ti | ime       |
|             |               | lon Timos u   |           |            |         |         |      |        |             |           |
|             |               | tion Times :: |           | 0.20 015   |         |         |      |        |             |           |
|             |               | )ec-2011 10:0 | U AM to 1 | 0:30 AM    |         |         |      |        |             |           |
| - :: Past I | nspections :: |               |           |            |         |         |      |        |             |           |
| No insp     | ection data   | has been en   | tered.    |            |         |         |      |        |             | -         |
|             |               |               |           |            |         |         |      |        |             |           |
|             |               |               |           |            |         |         |      |        |             |           |
|             |               |               |           |            |         |         |      |        |             |           |
|             |               |               |           |            |         |         |      |        |             |           |
|             |               |               |           |            |         |         |      |        |             |           |
| -           | -             |               |           |            |         |         |      |        |             |           |
| Save        | 100           |               |           |            |         |         |      |        |             |           |

5. Click Yes



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

| Available  | Inspections                                   | Off Market                       |
|------------|---|----------------------------------|
|            | rd or fill in property<br>our property result | options below. Your search<br>s. |
| Address:   | No. Enter                                     | Street. Suburb or ID             |
| For:       | Sale 🔹 T                                      | ype: Residential 💌               |
| Features:  |   |                                  |
| From \$:   | 1   | o \$:                            |
| Order:     | By Suburb                                     |                                  |
|            | Search  | Advanced Search                  |
|            |   |                                  |
| • Add a Pi | operty  |                                  |
| • Add a Pr | oject / Devel                                 | opment                           |

| :: Project : Cre      | ate                   |               |                        |   |
|-----------------------|-----------------------|---------------|------------------------|---|
| Step 1 of 5 - Comple  | te Project Overview   | 2             |                        |   |
| Overview Feature      | Agents & Contacts     | Resources     | Add/Edit Lots/Listings |   |
| Status:               | Offline               | -             |                        |   |
| Category: *           | Apartment Complex / U |               |                        |   |
| Authority:            | Exclusive             |               |                        |   |
| Display Price(\$):    |                       |               |                        |   |
| Contract Expiry:      | 29 11 2011            |               |                        |   |
| Project Stage:        | Completed             |               |                        |   |
| Project Name:         |                       |               |                        | E |
| Street No.:           |                       |               |                        |   |
| Street Name: *        |                       | Street        | Гуре: *                |   |
| Suburb: *             |                       | State: *      |                        |   |
| Address Format:       |                       |               |                        |   |
| and the second second | Tick to edit address  | for your web  | display format.        |   |
| Google Map:           | Re-Position Marker    |               |                        |   |
| Hide Address?:        | Tick to hide the add  | lress on your | web site.              |   |
| Key to Property?:     |                       |               |                        |   |
| Access Details.:      |                       |               |                        |   |
|                       |                       |               |                        | ÷ |

- 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 S    | treet, COC     | GEE (2034)      | (        |   | 08 |
|----------------------|-----------------------|----------------|-----------------|----------|---|----|
| Step 1 of 4 - Comp   | lete Project Overview |                |                 |          |   |    |
| Overview Featu       | res Agents & Contacts | Resources      | Add/Edit Lots/  | Listings |   |    |
| Status:              | Offline               |                |                 |          |   | ŕ  |
| Category: *          | Apartment Complex / U | Jr 💌           |                 |          |   |    |
| Authority:           | Exclusive             |                |                 |          |   |    |
| Display Price(\$):   | Contact Agent         |                |                 |          |   |    |
| Contract Expiry:     | 30 01 2012            |                |                 |          |   |    |
| Project Stage:       | Completed             | -              |                 |          |   |    |
| Project Name:        | Aqua View             |                |                 |          |   | E  |
| Street No.:          |                       |                |                 |          |   |    |
| Street Name: *       | Norton                | Street         | Type: *         | Street   |   |    |
| Suburb: *            | COOGEE (2034)         | State: *       | [               | NSW      |   |    |
| Address Format:      | Norton Street         | -              |                 |          |   |    |
|                      | Tick to edit address  | s for your web | display format. |          |   |    |
| Google Map:          | Re-Position Marker    |                |                 |          |   |    |
| Hide Address?:       | Tick to hide the ad   | dress on your  | web site,       |          |   |    |
| Key to Property?:    |                       |                |                 |          |   |    |
| Access Details.:     |                       |                |                 |          | 1 |    |
| A CONTRACT OF STREET |                       |                |                 |          |   | ÷  |

- 4. Click on Save & Proceed
- 5. Enter Features of the Project: Main Headline, Project Description and Features of the Project

| :: Projec   | t : #1J0   | 002 - Norton Stre   | eet, Cooge    | e   | •                | 8 |
|-------------|------------|---|---------------|---|------------------|---|
| Step 2 of 4 | - Complete | Features and Descript   | tion          |   |                  |   |
| Overview    | Features   | Agents & Contacts   | Resources     | Add/Edit Lots/Listings  |                  |   |
| Main Head   | line:      |   |               |   |                  | - |
| Project Des |            | Characters typed in so  | ) far: [0] (1 | max = 150 characters)   |                  |   |
|             |            | Characters typed in so  | ) far: 0 (1   | max = 2500 characters)  |                  | H |
| Features:   |            | <ul> <li>Air Conditioning</li> <li>Alarm System</li> <li>Area Views</li> <li>Beach Front</li> <li>Built-In Wardrobes</li> <li>Bush Retreat</li> <li>City Views</li> </ul> |               | Lift Installed<br>Ocean Views<br>Open Fire Place<br>Penthouse<br>Pets Allowed<br>Pool<br>Presting Homes | *<br>E           |   |
| « Previo    | ous Step   | 8   |               |   | Save & Proceed » | + |

- 6. Click on Save & Proceed
- 7. Add related Agents & Contacts

| :: Project    | t : #1J00  | 002 - Norton Stre                        | eet, Cooge       | e                      |                        | 0 |
|---------------|------------|--|------------------|------------------------|------------------------|---|
| Step 3 of 4 - | Specify Ag | jents & Contacts relate                  | ed to this proje | ect transaction        |                        |   |
| Overview      | Features   | Agents & Contacts                        | Resources        | Add/Edit Lots/Listings |                        |   |
| C:: Assign re | elated Age | nts ::                                   |                  |                        |                        | ř |
| Role:         | [          | Listing Agent                            |                  |                        | (uncheck to de-select) |   |
| Agent         | [          | John                                     | Add              |                        |                        |   |
| Selected 4    | Agents:    | John Smith (Listing Age<br>Add New Staff | ent)             |                        |                        |   |
|               | 1          |  |                  |                        |                        |   |
|               |            |  |                  |                        |                        |   |
| Appear on     | Site:      |  |                  |                        |                        | E |
|               |            |  |                  |                        |                        |   |
|               |            |  |                  |                        |                        |   |
|               | l          |  |                  |                        |                        |   |
|               |            |  |                  |                        |                        |   |
| -:: Assign re | elated Com | acts ::                                  |                  |                        |                        |   |
| Role:         |            | Accountant                               | T                |                        |                        |   |
| Contact:      |            | Assign your contacts                     | Add              |                        | (uncheck to de-select) |   |
| Selected A    |            |  |                  |                        |                        |   |
| 10000000      |            |  |                  |                        |                        |   |
|               |            |  |                  |                        | 1                      | _ |

| :: Projec                     | :t : #1J0              | 002 - Norton Stre                            | eet, Cooge      | e                     |                        | 0 |
|-------------------------------|------------------------|--|-----------------|-----------------------|------------------------|---|
| Step 3 of 4                   | - Specify Ag           | gents & Contacts relate                      | ed to this proj | ect transaction       |                        |   |
| Overview                      | Features               | Agents & Contacts                            | Resources       | Add/Edit Lots/Listing | 19                     |   |
| Appear o                      | n Site:                | ☑ John Smith (Listing /                      |                 |                       |                        |   |
| Role:<br>Contact:<br>Selected | related Con<br>Agents: | tacts ::-<br>Vendor<br>I Gary Brown (Vendor) | × Add           |                       | (uncheck to de-select) | E |
| « Previo                      | ous Step               |  |                 |                       | Save & Proceed »       |   |

- 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.

| Overview         Features         Agents & Contacts         Resources         Add/EditListings           Project Photos   Documents         Please ensure that a photo does not exceed 2MB in filesize and the minimum dimensions of that photo are no smaller than 800px wide x 600px high.         Property Photos           ** Main Photo ::         Property Photos         These are the property images that are attached to this property. Simply sing 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           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. |            |              | ject Photos and relat                                 |  | 1  | Full Vie  |
|--|------------|--------------|---|--|--|---|
| Photo(s) Upload       Please ensure that a photo does not exceed 2MB in filesize 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 sing 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         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.   | weiview    | Features     | Agents & Contacta                                     | Resources  | Add/Edit Listings-   |   |
| of that photo are no smaller than 800px wide x 600px high.<br>:: Main Photo ::<br>Property Photos<br>These are the property images that are attached to this property. Simply sing<br>click, hold and drag the property photos into the order you would like them to<br>appear. To change the 'Main Photo' simply drag a sub image into image slot<br>On rollover of an image you will see a symbol appear in the bottom right<br>hand corner. Simply click it to view an enlarged image.  | roject Ph  | otos   Docum | ents  |  |  |   |
| Property Photos<br>These are the property images that are attached to this property. Simply sing<br>click, hold and drag the property photos into the order you would like them to<br>appear. To change the 'Main Photo' simply drag a sub image into image slot<br>On rollover of an image you will see a symbol appear in the bottom right<br>hand corner. Simply click it to view an enlarged image.  | Photois    |              |   |  |  | minimum dimensions  |
| -:: All Photos ::-   |            |              | These are<br>click, hold<br>appear. To<br>On rollover | the property in<br>and drag the p<br>change the 'M<br>of an image ye | roperty photos into the order<br>ain Photo' simply drag a sub<br>ou will see a <b>Q</b> symbol app | you would like them to<br>image into image slot 1.<br>ear in the bottom right |
|  | :: All Pho | tos ::       |   |  |  |   |
| Save   | Cours      | -            |   |  |  |   |
| Save   | Save       |              |   |  |  |   |
|  |            |              |   |  |  |   |

10. Click Save

# Add Properties to a Project

# How do I add a Property to a Project?

1. <u>Search for your Project</u> and open the Project card.

| Inojec      |          | 10002 - Norton S    | coc            | JOLL (2034)    |            | E. | II View |
|-------------|----------|---------------------|----------------|----------------|------------|----|---------|
| Overview    | Features | Agents & Contacts   | Resources      | Add/Edit Listi | ings       | Fu | II VIEW |
| Status:     | 1        | Offline             |                | L              |            |    |         |
| Category: * |          | Apartment Complex / |                |                |            |    |         |
| Authority:  |          | Exclusive           |                |                |            |    |         |
| Display Pri | ce(\$):  | Contact Agent       |                |                |            |    |         |
| Contract Ex |          | 30 01 2012          |                |                |            |    |         |
| Project Sta |          | Completed           | -              |                |            |    |         |
| Project Nar | -        | Aqua View           | -              |                |            |    |         |
| Street No.: |          |                     |                |                |            |    |         |
| Street Nam  | e: *     | Norton              | Street         | Туре: *        | Street     |    |         |
| Suburb: *   |          | COOGEE (2034)       | State:         |                | NSW        |    |         |
| Address Fo  | rmat:    | Norton Street       |                |                |            |    |         |
|             |          | Tick to edit addres | s for your web | display format | <b>b</b> . |    |         |
| Google Ma   | p:       | Re-Position Marker  | 1              |                |            |    |         |
| Hide Addre  | ss?:     | Tick to hide the ad | dress on your  | web site.      |            |    |         |
| Key to Prop |          |                     |                |                |            |    |         |
| Access Det  | ails.:   |                     |                |                |            | 1  |         |
|             |          |                     |                |                |            |    |         |

2. Click on the Add/Edit Listings tab

| :: Projec   | t : #1J00     | 02 - Norton Stre  | eet, Cooge | e                 | 9 6       |
|-------------|---------------|-------------------|------------|-------------------|-----------|
| 品           |               |                   |            |                   | Full View |
| Overview    | Features      | Agents & Contacts | Resources  | Add/Edit Listings |           |
| Add He      |               |                   |            |                   |           |
| Add Ne      | ew Listings   |                   |            |                   |           |
| -:: Associa | ted 0 Listing | 15 ::             |            |                   |           |
| No Listin   | gs has been   | ontorod           |            |                   |           |
| No Liauni   | ja nua been   | entereu.          |            |                   |           |
| Save        |               |                   |            |                   |           |
| Save        |               |                   |            |                   |           |
|             |               |                   |            |                   |           |
|             |               |                   |            |                   |           |
|             |               |                   |            |                   |           |
|             |               |                   |            |                   |           |
|             |               |                   |            |                   |           |
|             |               |                   |            |                   |           |
|             |               |                   |            |                   |           |
|             |               |                   |            |                   |           |
|             |               |                   |            |                   |           |
|             |               |                   |            |                   |           |
|             |               |                   |            |                   |           |
|             |               |                   |            |                   |           |
|             |               |                   |            |                   |           |
|             |               |                   |            |                   |           |
|             |               |                   |            |                   |           |

3. Click on Add New Listing

| :: Listing  | : Create     |               |           |                        |                   | 2    | 0 🙆 |
|-------------|--------------|---------------|-----------|------------------------|-------------------|------|-----|
| Step 1 of 6 | - Complete   | ieneral Infor | mation    |                        |                   |      |     |
| General     | For Sale/Lea | se Featur     | es OFI    | Agents & Contacts      | Resources         |      |     |
| Status:     |              | ffline        |           |                        |                   |      | *   |
| For Sale/Re | ental:       | or Sale       |           | -                      |                   |      |     |
| Type: *     | E            | esidential    |           | -                      |                   |      |     |
| Category: * | π            | nit           |           | -                      |                   |      |     |
| Investment  | ?; 🗉         |               |           |                        |                   |      |     |
| Sale Metho  | d: [F        | rivate Treaty |           | -                      |                   |      |     |
| Authority:  | E            | xclusive      | 1         | •                      |                   |      | iii |
| Property Na | ame:         |               | _         |                        |                   |      |     |
| Level No.:  |              | Unit          | No.:      | Street No.:            |                   |      |     |
| Street Nam  | e:*          | orton         |           | Street Type: *         | Street            |      |     |
| Suburb: *   | C            | DOGEE (2034   | .)        | State: *               | NSW               |      |     |
| Hide Addre  | ss?:         | Tick to hide  | the addr  | ess on your web site.  |                   |      |     |
|             | E            | Tick to edit  | address f | or your web display fo | ormat.            |      |     |
| Address Fo  | rmat:        | orton Street  |           |                        |                   |      |     |
| Google Maj  | p:           | Re-Position M | arker E   | Hide Street View       | Hide "What's arou | ınd" |     |
| Key to Prop | perty?:      |               |           |                        |                   |      |     |
| Access Deta | ails.:       |               |           |                        |                   |      | +   |

4. Complete fields on all tabs for <u>entering a Property</u>. 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.

| 合 Project - ID#1J0002   | :: Projec                          | t : #1J0   | 002 - Norton Str  | eet, Cooge | e   |           |
|---|------------------------------------|--|-------------------|------------|---|-----------|
| < Back to Properties  | 冊                                  |  | _                 |            |   | Full View |
| ✓ Associated 1 Listings   | Overview                           | Features   | Agents & Contacts | Resources  | Add/Edit Listings                                 |           |
| • ID #1P0009 - Level 1, Unit 1/12 Norton Street<br>More Detail >> | Clone m<br>-:: Associa<br>• ID# 11 | ew Listings<br>nore Listings<br>nted 1 Listing<br>P0009 Level:<br>s: Offline | gs ::             |            | th: 0 Car: 0 Aspect<br>\$300,000 Rent (\$p.w.): [ |           |
| > Recent Inspections  |                                    |  |                   |            |   |           |
| > Project Modifications   |                                    |  |                   |            |   |           |
| > Help Text   |                                    |  |                   |            |   |           |
|   |                                    |  |                   |            |   |           |

# 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

| ĥ       |                |   |              |                           | Full Vie |
|---------|----------------|---|--------------|---------------------------|----------|
| verview | Features       | Agents & Contacts                       | Résources    | Add/Edit Listings         |          |
| Add Ne  | w Listings     |   |              |                           |          |
| Clone m | iore Listings  |   |              |                           |          |
|         |                |   |              |                           |          |
| Associa | ited 1 Listing | s ::-                                   |              |                           |          |
| 10# 11  |                | 1 Unit: 1 E                             | Bed 0 Ba     | th: 0 Car: 0 Aspect:      |          |
|         |                |   | _            |                           |          |
| Statu   | si Offline     | <ul> <li>Search (\$): 290000</li> </ul> | Display (\$) | \$300,000 Rent (\$p.w.) 0 |          |
|         |                |   |              |                           |          |
|         |                |   |              |                           |          |
| Save    |                |   |              |                           |          |

3. Click on Clone More Listings

| Enter listing ID or Suburb name | Select Propert | v.* |    |  |
|---------------------------------|----------------|-----|----|--|
| low many                        |                |     | 1e |  |
|                                 | How many       |     |    |  |
| 1 more                          |                |     |    |  |

4. Select Property to Clone

5. Select Number of Properties to clone

| s             |
|---------------|
| t 1/12 N, Cod |
|               |
|               |
|               |

#### 6. Click on Save

| <u> </u> |              | Thereway                                | 1                | La comparte da contra  | Full Vie |
|----------|--------------|---|------------------|--|----------|
| erview   | Features     | Agents & Contacts                       | Resources        | Add/Edit Listings  |          |
| Add Ne   | W Listings   |   |                  |  |          |
| one fron | n a Lot/List | ing                                     |                  |  |          |
|          |              |   |                  |  |          |
| Cloning  | 3 Listings   | from ID#1P0009 - Leve                   | I 1, Unit 1/12 N | lorton Street ::   | 1        |
| 1-2020   | a hu         |   |                  |  | -        |
| Level    |              |   | -                |  | -        |
| Statu    | s: Offline   | <ul> <li>Search (\$): 290000</li> </ul> | Display (\$)     | \$300,000 Rent (\$p.w.): 0   |          |
| Level:   | 1 Un         | it: 1 Bed: 0 1                          | Bath: 0 C        | ar: 0 Aspect:  | 7        |
|          |              |   |                  | and the second se  | _        |
| Statu    | s: Offline   | <ul> <li>Search (\$): 290000</li> </ul> | Display (\$)     | \$300,000 Rent (\$p.w.): 0   |          |
| Level:   | 1 Un         | it: 1 Bed: 0 I                          | Bath: 0 C        | ar: 0 Aspect:  | -        |
| Statu    | s: Offline   | Search (\$): 290000                     | Display (\$)     | \$300,000 Rent (\$p.w.): 0   |          |
| orard    | e. Louine    | Tel conten (e).                         | Display (4).     | The second secon |          |
|          |              |   |                  |  |          |
| Save     |              |   |                  |  |          |

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

| 1       | -              |   |                  |                            | Full Vie |
|---------|----------------|---|------------------|----------------------------|----------|
| /erview | Features       | Agents & Contacts                       | Resources        | Add/Edit Listings          |          |
| Add Ne  | W Listings     |   |                  |                            |          |
| _       | n a Lot/Listir |   |                  |                            |          |
| one non |                | <sup>rg</sup>                           |                  |                            |          |
| Cloning | 3 Listings f   | rom ID#1P0009 - Leve                    | I 1, Unit 1/12 N | lorton Street ::           | 1        |
|         | Le lu s        |   |                  |                            |          |
| Level:  | 1 Unit         | : 1 Bed: 1 I                            | Bath: 1 C        | ar: 0 Aspect:              |          |
| Statu   | s: Offline     | Search (\$): 290000                     | Display (\$):    | \$300,000 Rent (\$p.w.): 0 |          |
| Level:  | 1 Unit         | 2 Bed: 1 I                              | Bath 1 C         | ar: 0 Aspect:              |          |
|         |                |   |                  |                            |          |
| Statu   | s: Offline     | <ul> <li>Search (\$): 290000</li> </ul> | Display (\$)     | \$300,000 Rent (\$p.w.): 0 |          |
| Level:  | 2 Unit         | : 3 Bed: 2 F                            | Bath: 1 C        | ar: 1 Aspect:              | Li Li    |
| Statu   | s: Offline     | Search (\$): 290000                     | Display (\$)     | \$350,000 Rent (\$p.w.): 0 |          |
| otara   | e. Louine      |   | Diopidy (4).     | traine (ab-in-).           |          |
|         |                |   |                  |                            |          |
| Save    |                |   |                  |                            |          |
|         |                |   |                  |                            |          |

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

| 合 Project - ID#1J0002  | :: Project : #1J0002 - Norton Street, Coogee   |  |  |  |  |
|--|--|--|--|--|--|
| < Back to Properties   | Full View  |  |  |  |  |
| ✓ Associated 4 Listings  | Overview Features Agents & Contacts Resources Add/Edit Listings  |  |  |  |  |
| ID #1P0009 - Level 1, Unit 1/12 Norton Street More Detail »      | Add New Listings   |  |  |  |  |
| • ID #1P0010 - Level 1, Unit 1/12 Norton Street<br>More Detail » | Clone more Listings  |  |  |  |  |
| • ID #1P0011 - Level 1, Unit 2/12 Norton Street<br>More Detail » | C:: Associated 4 Listings ::-  |  |  |  |  |
| * ID #1P0012 - Level 2, Unit 3/12 Norton Street<br>More Detail » | ID# 1P0009 Level: 1 Unit: 1 Bed: 0 Bath: 0 Car. 0 Aspect: ▼     Status: Offline ▼ Search (\$): 290000 Display (\$): <u>\$300,000</u> Rent (\$p.w.): 0      ID# 1P0010 Level: 1 Unit: 1 Bed: 1 Bath: 1 Car. 0 Aspect: ▼     Status: Offline ▼ Search (\$): 290000 Display (\$): <u>\$300,000</u> Rent (\$p.w.): 0 |  |  |  |  |
| > Recent Inspections   |  |  |  |  |  |
| Project Modifications  | ID# 1P0011 Level: 1 Unit: 2 Bed: 1 Bath: 1 Car. 0 Aspect:  |  |  |  |  |
| > Help Text  | Status: Offine - Search (\$): 290000 Display (\$): \$300,000 Rent (\$p.w.): 0  |  |  |  |  |
|  | ID# 1P0012 Level: 2 Unit: 3 Bed: 2 Bath: 1 Car: 1 Aspect:      Status: Offline Search (\$): 290000 Display (\$): \$350,000 Rent (\$p.w.): 0  Save  |  |  |  |  |

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 <u>Universal Search Bar</u>
- O 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

| 🏫 Prop     | erties                                       |                                   |
|------------|--|-----------------------------------|
| Available  | Inspections                                  | Off Market                        |
|            | rd or fill in property<br>our property resul | options below. Your search<br>ts. |
| Address:   | Enter  | Street. Suburb or ID              |
| For:       | Sale 💌 T                                     | ype: Residential                  |
| Features:  |  |                                   |
| From \$:   | 1  | To \$:                            |
| Status:    | All  | -                                 |
| Order:     | By Suburb                                    |                                   |
| 1          | Search                                       | Advanced Search                   |
| • Add a Pr | operty                                       |                                   |
| • Add a Pr | oject / Devel                                | opment                            |
| • Add an A | ppraisal / Pro                               | ospect Property                   |

3. Enter a Keyword in the Left Panel Search

| Properties  | ✓ Property Results   | 2 |
|---|--|---|
| Available     Inspections     Off Market       Enter a keyword or fill in property options below. Your search will auto filter your property results. (1 found)       Address:     Victoria   | ID #1P0008<br>654 Victoria Street<br>Sydney<br>Offers above \$1.2 Million<br>OFFLINE |   |
| For: Sale   Features: Image: Constraint of the sector |  |   |
| Order: By Suburb  Search Advanced Search Advanced Search  |  |   |
|   |  |   |
| <ul> <li>Add a Project / Development</li> </ul>   |  |   |
| <ul> <li>Add an Appraisal / Prospect Property</li> </ul>  |  |   |

- 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   |  |  |  |  |  |
| Туре: *  | Residential  |  |  |  |  |  |
| Category: *  | House Copy This Property                                     |  |  |  |  |  |
| Investment?:   | Vendor Preview Link  |  |  |  |  |  |
| 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  |  |  |  |  |  |
| Goodle Map:  | Re-Position Marker   Hide Street View   Hide "What's around" |  |  |  |  |  |
|  | Save   |  |  |  |  |  |

### Universal Search Bar

1. Click on Listings from the Universal Search Bar at the top of the screen

|    | Listing | s Projects      | Contacts  | Staff  | Miscellaneous |   |
|----|---------|-----------------|-----------|--------|---------------|---|
| 23 | QE      | Enter a Listing | ID Street | Name o | r Suburb Name | 2 |

- 2. Enter Listing ID, Street Number, Name or Suburb Name
- 3. A list of properties will appear in a drop down

| 23 | Listings Projects Contacts Staff Miscellaneous |
|----|--|
|    | Type   |
|    | 654 Victoria Street, Sydney                    |
|    | Add New Listing                                |

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

| :: Listing : ID#1F | 20008 - 654Victoria Street, Sydney 🗢 🙆                     |
|--------------------|--|
| # @ = 0            | 🖗 🏠 🚱 🔯 🛗 🖹 🚘 🦄 📶 👌 🚳 🛛 Full View                          |
| General For Sale   | Features OFI Agents & Contacts Resources Commission        |
| Status:            | Offline 🔹  |
| For Sale/Rental:   | For Sale   |
| Туре: *            | Residential  |
| Category: *        | House Copy This Property                                   |
| Investment?:       | Vendor Preview Link  |
| 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 Hadver THide Street View THide "What's around" |
|                    | Save   |

## Advanced Property Search

1. Click on the Properties icon from the Main Menu



2. Click on Advanced Search on the Left Panel

| 合 Properties  | :: Advanced | :: Advanced Property Search : New Search  |                  |  |      |  |
|---|-------------|---|------------------|--|------|--|
| Available Inspections Off Market  | New Search  |   |                  | Saved Searches                                       | •    |  |
| Enter a keyword or fill in property options below. Your search<br>will auto filter your property results. | Туре:       | Residential   | For Sale/Rental: | PT & Auction   |      |  |
| Address:<br>For: Sale Type: Residential Features:   | Category:   | Acreage<br>Apartment<br>Block Of Units<br>House   | Status:          | Appraisal<br>Available<br>Deposit Taken<br>Exchanged | - BA |  |
| From \$: To \$:   | State:      | NSW   |                  |  |      |  |
| Status: All  Corder: By Suburb Search Advanced Search   | Regions:    | Blue Mountains & Surround<br>Canterbury/bankstown<br>Central Coast & Region<br>Central Tablelands | ds               | *  |      |  |
| Add a Property  | Suburb(s):  | Add   | (uncheck from b  | elow to delete a Suburb)                             |      |  |
| Add a Project / Development   |             | Selected Suburbs:   |                  |  |      |  |
| • Add an Appraisal / Prospect Property  |             |   |                  |  | ÷    |  |
|   |             | Search  |                  |  |      |  |

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
- O 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

| A Prop                                  | erties  |                                  |
|---|---|----------------------------------|
| Available                               | Inspections                                   | Off Market                       |
| 1 | rd or fill in property<br>our property result | options below. Your search<br>s. |
| Address:                                | Sale 💌 T                                      | ype: Residential 💌               |
| Features:                               |   |                                  |
|   | By Suburb                                     | •                                |
| 1                                       | Search  | Advanced Search                  |
| • Add a Pr                              | operty  |                                  |
| • Add a Pr                              | oject / Devel                                 | opment                           |
| • Add an A                              | oppraisal / Pro                               | ospect Property                  |

- 3. Click on the Type drop down and select Project
- 4. Click on Search

| A Prop  | perties                               |   | ✓ Project Results                              |  |
|---|---------------------------------------|---|--|--|
| will auto filter         Address:         For:         From \$:         Status: | your property resul                   |   | ID #1J0001<br>Ocean Avenue<br>Manly<br>OFFLINE |  |
| • Add a P<br>• Add a P  | Search<br>Property<br>Project / Devel | Advanced Search<br>Copment<br>ospect Property |  |  |

- 6. Click on the Project of your choice from the Project Results Panel
- 7. Your Project will appear on screen

| :: Projec   | t : ID#1.               | J0001 - Ocean Av   | venue, MA     | NLY (2095)   | )             | Full View  |
|---|-------------------------|--|---------------|--------------|---------------|------------|
| Overview  | Features                | Agents & Contacts  | Resources     | Add/Edit Lis | tings         | 0.000.0400 |
| Status:<br>Category: *<br>Authority:<br>Display Prio<br>Contract Ex<br>Project Stat | :e(\$):<br>piry:<br>ge: | Offline<br>Apartment Complex / U<br>Exclusive<br>Contact Agent<br>23 11 2011<br>Completed<br>Sunset Towers |               |              |               |            |
| Street No.:<br>Street Nam<br>Suburb: *<br>Address For                               | e; *                    | Ocean<br>MANLY (2095)<br>Ocean Avenue  | Street State: |              | Avenue<br>NSW | •          |
| Google Map<br>Hide Addre<br>Key to Prop<br>Access Deta                              | ss?;<br>erty?:          | <ul> <li>Tick to edit address</li> <li>Re-Position Marker</li> <li>Tick to hide the address</li> </ul>     |               |              | at.           |            |

### 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

| NOV | Listings | Projects | Contacts    | Staff | Miscellaneous | The second |
|-----|----------|----------|-------------|-------|---------------|------------|
| 23  | Q oce    |          | renue, Mani | Y     |               | 5)         |
|     | Add Nev  | Project  |             |       |               |            |

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

| :: Projec   | t : ID#1.               | J0001 - Ocean Av   | venue, MA     | NLY (2095)   | )             | Full View  |
|---|-------------------------|--|---------------|--------------|---------------|------------|
| Overview  | Features                | Agents & Contacts  | Resources     | Add/Edit Lis | tings         | 0.000.0400 |
| Status:<br>Category: *<br>Authority:<br>Display Prio<br>Contract Ex<br>Project Stat | :e(\$):<br>piry:<br>ge: | Offline<br>Apartment Complex / U<br>Exclusive<br>Contact Agent<br>23 11 2011<br>Completed<br>Sunset Towers |               |              |               |            |
| Street No.:<br>Street Nam<br>Suburb: *<br>Address For                               | e; *                    | Ocean<br>MANLY (2095)<br>Ocean Avenue  | Street State: |              | Avenue<br>NSW | •          |
| Google Map<br>Hide Addre<br>Key to Prop<br>Access Deta                              | ss?;<br>erty?:          | <ul> <li>Tick to edit address</li> <li>Re-Position Marker</li> <li>Tick to hide the address</li> </ul>     |               |              | at.           |            |

# Advanced Property Search

1. Click on Properties icon from the main menu



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

| 🏫 Prop  | erties          |                              | :: Advanced   | Property Search : New S  | earch   |                |
|---|-----------------|------------------------------|---|--|---|----------------|
| Available   | Inspections     | Off Market                   | New Search  |  |   | Saved Searches |
| Enter a keyword or fill in property options below. Your search<br>will auto filter your property results.<br>Address: Enter Street, Suburb or ID<br>For: Sale Type: Project From \$: To \$:<br>Order: By Suburb |                 | Type:<br>Category:<br>State: | Project  Apartment Complex / Un House & Land Packages Land Estate | Status:  | Appraisal<br>Available<br>Deposit Taken<br>Exchanged<br>+ |                |
| Under.  | Search          | Advanced Search              | Regions:  | Blue Mountains & Surroun<br>Canterbury/bankstown<br>Central Coast & Region<br>Central Tablelands | ds  | *              |
| <ul> <li>Add a Property</li> </ul>  |                 | Suburb(s):                   | Selected Suburbs:   | (uncheck fro   | om below to delete a Suburb)                              |                |
| • Add a Pr  | roject / Develo | pment                        |   |  |   |                |
| • Add an A  | Appraisal / Pro | spect Property               |   |  |   |                |
|   |                 |                              |   | Search   |   |                |

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

| :: Advance | d Property Se        | arch : Search Resu | ilts(1 property found) | 0             |
|------------|----------------------|--------------------|------------------------|---------------|
| New Search | Search Results       | Refine Search      |                        |               |
|            |                      |                    |                        | e             |
|            | ID #1J000<br>AVAILAB | Manly              | 9.                     | Contact Agent |
|            |                      |                    |                        |               |
|            |                      |                    |                        |               |
|            |                      |                    |                        |               |
|            |                      |                    |                        |               |
|            |                      |                    |                        |               |
|            |                      |                    |                        |               |

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 <u>Left Panel Fast Find</u>
- Through the <u>Universal Search Bar</u>
- O 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

| n Pro     | perties   |                                   |
|-----------|---|-----------------------------------|
| Available | Inspections                                       | Off Market                        |
|           | vord or fill in property<br>r your property resul | options below. Your search<br>ts. |
| Address:  |   | 1                                 |
| For:      | Sale 💌 1  | ype: Residential                  |
| Features: |   |                                   |
| From \$:  |   | To \$:                            |
| Status:   | All   |                                   |
| Order:    | By Suburb   |                                   |
| . )       | Search  | Advanced Search                   |
| • Add a F | Property  |                                   |
| • Add a F | Project / Devel                                   | opment                            |
| • Add an  | Appraisal / Pro                                   | ospect Property                   |

- 3. Click on the Status drop down and select Appraisal
- 4. Click on Search

| A Prop   | perties  |   | ✓ Property Results   | 8 |
|--|--|---|--|---|
|  | Inspections<br>ord or fill in property<br>your property result | Off Market<br>options below. Your search<br>ts. (2 found) | ID #1P0006<br>14 Mars Lane<br>Copacabana<br>APPRAISAL      |   |
| Address:<br>For:<br>Features:<br>From \$:<br>Status:<br>Order: | Sale   | Type: Residential   | ID #1P0007<br>1 Jones Boulevard<br>Copacabana<br>APPRAISAL |   |
| • Add a P<br>• Add a P   | roperty<br>roject / Devel                                      | opment  |  |   |
| • Add an   | Appraisal / Pro  | ospect Property   |  |   |

- 6. Click on the Appraisal of your choice from the Property Results Panel
- 7. Your Appraisal property will appear on screen

| :: Appraisal : #1      | P0006 - 14 Mars La   | ne, COPACABANA           | (2251)   | •         |
|------------------------|----------------------|--------------------------|----------|-----------|
|                        | P 2 0 2              |                          | 1 7 6    | Full View |
| Appraisal Agents 8     | Contacts Custom Info | Resources                |          |           |
| C: Property to Appra   | ise ::-              |                          |          |           |
| Status:                | Appraisal            | For Sale/Rental:         | For Sale |           |
| Туре: *                | Residential          |                          |          |           |
| Category: *            | House                |                          |          | -         |
| Property Name:         |                      |                          |          |           |
| Level No.:             | Unit No.:            | Street No.:              | 14       |           |
| Street Name: *         | Mars                 | Street Type: *           | Lane     |           |
| Suburb: *              | COPACABANA (2251)    | State: *                 | NSW      | •         |
| Address Format:        | 14 Mars Lane         |                          |          |           |
|                        | Tick to edit address | for your web display for | mat.     |           |
| Google Map:            | Re-Position Marker   |                          |          |           |
| -:: Appraisal Info ::- |                      |                          |          |           |
| Price From(\$):        |                      | Price To(\$):            |          |           |
| Appraisal Price(\$): * | 1100000              | Appraisal For:           | Vendor   |           |
|                        | Save                 |                          |          |           |
|                        |                      |                          |          |           |

### Universal Search Bar

1. Click on Listings from the Universal Search Bar at the top of the screen

| NOV | Listing | gs Projects     | Contacts   | Staff  | Miscellaneous |
|-----|---------|-----------------|------------|--------|---------------|
| 23  | Q       | Enter a Listing | ID. Street | Name o | r Suburb Name |

- 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

| NOV | Listings | Projects                  | Contacts    | Staff   | Miscellaneous |        |
|-----|----------|---------------------------|-------------|---------|---------------|--------|
| 23  |          | rs.                       |             |         |               |        |
|     | Туре     |                           | For 👻       | -Status |               | Refine |
|     |          | 14 Mars I<br>Another Mars | Lane, Copar | pabana  |               |        |
|     | Add Nex  | V Listing                 |             |         |               |        |

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

|                        | P 2 0 1                  |                        | 1 2 6    | Full Viev | w |
|------------------------|--------------------------|------------------------|----------|-----------|---|
| Appraisal Agents &     | Contacts Custom Info     | Resources              |          |           |   |
| :: Property to Apprai  | se ::                    |                        |          | -         | 2 |
| Status:                | Appraisal                | For Sale/Rental:       | For Sale |           |   |
| Type: *                | Residential              | 3                      |          |           |   |
| Category: *            | House                    | ]                      |          |           |   |
| Property Name:         |                          | ]                      |          |           |   |
| Level No.:             | Unit No.:                | Street No.:            | 14       | 100       |   |
| Street Name: *         | Mars                     | Street Type: *         | Lane     | •         | L |
| Suburb: *              | COPACABANA (2251)        | State: *               | NSW      | -         |   |
| Address Format:        | 14 Mars Lane             |                        |          |           |   |
|                        | Tick to edit address for | r your web display for | nat.     |           |   |
| Google Map:            | Re-Position Marker       |                        |          |           |   |
| -:: Appraisal Info ::  |                          |                        |          |           |   |
| Price From(\$):        |                          | Price To(\$):          |          |           |   |
| Appraisal Price(\$): * | 1100000                  | Appraisal For:         | Vendor   | -         | ÷ |

### Advanced Property Search

1. Click on Properties icon from the main menu



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

| A Properties   |   | :: Advanced | :: Advanced Property Search : New Search 3  |                             |  |   |  |  |  |  |
|--|---|-------------|---|-----------------------------|--|---|--|--|--|--|
| Available Inspections  | Off Market                                    | New Search  |   |                             | Saved Searches   | • |  |  |  |  |
| For: Sale T<br>Features:   | s.<br>Street Suburb or ID<br>ype: Residential | Category:   | Residential   | For Sale/Rental:<br>Status: | PT & Auction       Appraisal       Available       Deposit Taken       Exchanged | E |  |  |  |  |
| From \$: T<br>Order: By Suburb<br>Search   | o \$:   |             | NSW<br>Blue Mountains & Surroun<br>Canterbury/bankstown<br>Central Coast & Region<br>Central Tablelands | ds                          | •  |   |  |  |  |  |
| <ul> <li>Add a Property</li> <li>Add a Project / Develo</li> <li>Add an Appraisal / Project</li> </ul> |   | Suburb(s):  | Selected Suburbs:   | (uncheck from be            | elow to delete a Suburb)   |   |  |  |  |  |
|  |   |             | Search  |                             |  |   |  |  |  |  |

- 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:

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

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

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

<u>Holiday</u>: 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

| New Search |  |                  | Saved S  | earches | + |
|------------|--|------------------|--|---------|---|
| Туре:      | Residential  | For Sale/Rental: | PT & Auction   |         |   |
| Category:  | Acreage  | Status:          | Appraisal<br>Available<br>Deposit Taken<br>Exchanged | *       | E |
| State:     | NSW  |                  |  |         |   |
| Regions:   | Blue Mountains & Surroun<br>Canterbury/bankstown<br>Central Coast & Region<br>Central Tablelands | ds               |  | -       |   |
|            | Central West Slopes  |                  |  | .+      |   |
| Suburb(s): | Adn  | (uncheck from be | elow to delete a Subu                                | rb)     |   |
|            | Selected Suburbs:  |                  |  |         |   |
|            |  |                  |  |         |   |

### 4. Click on Search

| :: Advance | d Property Se  | arch : Search | Results(2 properties found) |
|------------|----------------|---------------|-----------------------------|
| New Search | Search Results | Refine Search |                             |
|            |                |               |                             |
|            | ID #1P000      |               | rs Lane,<br>abana           |
|            | APPRAIS        |               |                             |
|            | ID #1P000      |               | es Boulevard.<br>abana      |
|            | APPRAIS        |               | abana                       |
|            |                |               |                             |
|            |                |               |                             |
|            |                |               |                             |

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 <u>Advanced Property Search</u>

### Left Panel Fast Find

1. Click on the Properties icon from the main menu



2. Select the Off Market tab

| A Properties  |                   |
|---|-------------------|
| Available Inspections   | Off Market        |
| Enter a keyword or fill in proper<br>will auto filter your property res |                   |
| Address:  | 1                 |
| For: Sale 💌   | Type: Residential |
| Features:   |                   |
| From \$:  | To \$:            |
| Status: All   |                   |
| Order: By Suburb  |                   |
| Search  | Advanced Search   |
| <ul> <li>Add a Property</li> </ul>                                      |                   |
| • Add a Project / Deve  | elopment          |
| • Add an Appraisal / P  | rospect Property  |

- 3. Click on the Type drop down and select Prospect
- 4. Click on Search

| A Prop  | Properties          |   | ✓ Property Results                           | 8 |
|---|---------------------|---|--|---|
| will auto filter Address: For: Features: From \$: Status: | your property resul | Off Market<br>options below. Your search<br>ts. (1 found) | ID #2<br>54 Burns Road<br>Sydney<br>PROSPECT |   |
| Constant of the   | roject / Devel      | Advanced Search<br>opment<br>ospect Property              |  |   |

- 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, SYD       | ONEY (2000)             |            | 0         |
|------------------------|--------------------------|-------------------------|------------|-----------|
| 1                      |                          |                         |            | Full View |
| Prospect Agents & C    | ontacts                  |                         |            |           |
| Prospect Property :    | ;                        |                         |            |           |
| Status:                | Prospect                 | For Sale/Rental:        | For Sale   |           |
| Type: *                | Residential              | 3                       |            |           |
| Category: *            | House                    | 3                       |            | E         |
| Property Name:         |                          |                         |            |           |
| Level No.:             | Unit No.:                | Street No.:             | 54         |           |
| Street Name: *         | Burns                    | Street Type: *          | Road       |           |
| Suburb: *              | SYDNEY (2000)            | State: *                | NSW        |           |
| Address Format:        | 54 Burns Road            |                         |            |           |
|                        | Tick to edit address for | or your web display for | mat.       |           |
| Google Map:            | Re-Position Marker       |                         |            |           |
| Prospect Info ::       |                          |                         |            |           |
| Last Sold Price(\$):   | 995000                   | ]                       |            | -         |
| Prospecting Price(\$): | 1250000                  | Last Sold Date:         | 23 11 2011 | -         |
|                        | Save                     |                         |            |           |
|                        |                          |                         |            |           |

## Advanced Property Search

1. Click on Properties icon from the main menu



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

| A Properties   |  | :: Advanced Property Search : New Search 8 |   |                  |                          |    |  |
|--|--|--|---|------------------|--------------------------|----|--|
| Available Inspections  | Off Market                                 | New Search                                 |   |                  | Saved Searches           | •  |  |
| Enter a keyword or fill in property<br>will auto filter your property result |  | Туре:                                      | Residential   | For Sale/Rental: | PT & Auction             |    |  |
| Address: Enter   | Street Suburb or ID<br>Fype: Residential 💌 |  | Acreage Apartment Block Of Units House +  | Status:          | Appraisal                | E. |  |
| From \$: 1   | fo \$:                                     | State:                                     | NSW   |                  |                          |    |  |
| Order: By Suburb   | Advanced Search                            | Regions:                                   | Blue Mountains & Surround<br>Canterbury/bankstown<br>Central Coast & Region<br>Central Tablelands | ds               | •                        |    |  |
| Add a Property   | _  | Suburb(s):                                 | Add   | (uncheck from be | elow to delete a Suburb) |    |  |
| Add a Project / Devel  | opment                                     |  | Selected Suburbs:   |                  |                          |    |  |
| • Add an Appraisal / Pro   |  |  |   |                  |                          | -  |  |
|  |  | -  | Search  |                  |                          |    |  |

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:

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

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

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

<u>Holiday</u>: 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           |  | - 14     |
|-------------|---|------------------|--|----------|
| New Search  |   |                  | Saved Se   | arches 💌 |
| Туре:       | Prospect Properties   | For Sale/Rental: | PT & Auction   | •        |
| Category:   | Acreage   | Status:          | Appraisal<br>Available<br>Deposit Taken<br>Exchanged | +        |
| State:      | NSW   |                  |  |          |
| Regions:    | Blue Mountains & Surrou<br>Canterbury/bankstown<br>Central Coast & Region<br>Central Tablelands | nds              |  | *        |
| Suburb(s):  | ADD   | (uncheck from be | elow to delete a Suburb                              | )        |
|             | Selected Suburbs:<br>Search   |                  |  |          |

4. Click on Search

| :: Advance  | d Property Se          | arch : Search | Results(1 property | y found) 🤷 |
|-------------|------------------------|---------------|--------------------|------------|
| New Search  | Search Results         | Refine Search |                    |            |
|             |                        |               | *                  |            |
| 4<br> 6<br> | ■ 3 ID #2<br>2 PROSPEC | Sydne         | rns Road,<br>y     |            |
|             |                        |               |                    |            |
|             |                        |               |                    |            |
|             |                        |               |                    |            |
|             |                        |               |                    |            |

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

| :: Prospect : #2 -     | 54 Burns Road, SY    | (DNEY (2000)             |          | 0         | 8 |
|------------------------|----------------------|--------------------------|----------|-----------|---|
| 2                      |                      |                          |          | Full View | N |
| Prospect Agents & C    | ontacts              |                          |          |           |   |
| Prospect Property :    |                      |                          |          |           |   |
| Status:                | Prospect             | For Sale/Rental:         | For Sale |           |   |
| Type: *                | Residential          | -                        |          |           |   |
| Category: *            | House                |                          |          |           | ш |
| Property Name:         |                      |                          |          |           |   |
| Level No.:             | Unit No.:            | Street No.:              | 54       |           |   |
| Street Name: *         | Burns                | Street Type: *           | Road     |           |   |
| Suburb: *              | SYDNEY (2000)        | State: *                 | NSW      |           |   |
| Address Format:        | 54 Burns Road        |                          |          |           |   |
|                        | Tick to edit address | for your web display for | mat,     |           |   |
| Google Map:            | Re-Position Marker   |                          |          |           |   |
| -:: Prospect Info ::   |                      |                          |          |           |   |
| Last Sold Price(\$):   | 995000               |                          |          |           |   |
| Prospecting Price(\$): | 1250000              | Last Sold Date:          | 23 11 2  | 011       | + |
|                        | Save                 |                          |          |           |   |
|                        |                      |                          |          |           |   |

# **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

| 合 Properties   | :: Advanced | :: Advanced Property Search : New Search  |                  |                          |   |  |  |
|--|-------------|---|------------------|--------------------------|---|--|--|
| Available Inspections Off Market   | New Search  |   |                  | Saved Searches           |   |  |  |
| Enter a keyword or fill in property options below. Your search will auto filter your property results. | h Type:     | Residential   | For Sale/Rental: | PT & Auction             |   |  |  |
| Address: Enter Street Suburb or ID<br>For: Sale Type: Residential                                      |             | Acreage Apartment Block Of Units House  | Status:          | Appraisal Available      | ŧ |  |  |
| From \$: To \$:  | State:      | NSW   |                  |                          |   |  |  |
| Order: By Suburb Search Advanced Search  |             | Blue Mountains & Surround<br>Canterbury/bankstown<br>Central Coast & Region<br>Central Tablelands | ds               | *                        |   |  |  |
| Add a Property   | Suburb(s):  | Add   | (uncheck from b  | elow to delete a Suburb) |   |  |  |
| Add a Project / Development  |             | Selected Suburbs:   |                  |                          |   |  |  |
| Add an Appraisal / Prospect Property   |             |   |                  |                          | - |  |  |
|  | -           | Search  |                  |                          |   |  |  |

- 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.

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

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

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

<u>Holiday</u>: 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

| New Search | Search Results                  | Refine Search   |                       |
|------------|---------------------------------|---|-----------------------|
|            |                                 |   | e 🚍                   |
|            | 3 ID #1P00<br>4<br>2 AVAILAI    | Copacabana  | Contact Agent         |
|            | 3 ID #1P00<br>2<br>2 AVAILAN    | Copacabana  | Offers over \$950.000 |
|            | ID #1P00<br>APPRAI              | Copacabana  |                       |
|            | □ 3 ID #1P00<br>□ 2<br>□ 1 SOLD | 03 52 Elizabeth Street,<br>Surry Hills<br>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 |                     |                   |           |            |            |
|---|---------------------|-------------------|-----------|------------|------------|
|   | P 2 0 1             |                   | - III     | ā          | Full View  |
| General For Sale                                    | Features Open Homes | Agents & Contacts | Resources | Commission |            |
| Status:   | Available           |                   |           | -          | -72-       |
| For Sale/Rental:                                    | For Sale            |                   |           |            |            |
| Type: *   | Residential         |                   |           | - AMA      |            |
| Category: *   | House               |                   |           | Copy This  | s Property |
| Investment?:  |                     |                   |           |            | eview Link |
| Sale Method:  | Private Treaty      |                   |           |            |            |
| Authority:  | Exclusive           |                   |           |            |            |
| Property Name:                                      |                     |                   |           |            |            |
| Level No.:  | Unit No.:           | Street No.:       | 1         |            |            |
| Street Name: *                                      | Jones               | Street Type: *    | Street    | ×          | 1.00       |
| Suburb: *   | COPACABANA (2251)   | State: *          | NSW       |            |            |
| 1164- Add   | Save                | 9 A               |           | - 2        | -          |

# 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 <u>Advanced Property Search</u> panel
- 2. Enter your Search Criteria into the appropriate fields

| Properties   |                 |   | :: Advanced Property Search : New Search   |   |                  |                  |                          |   |
|--|-----------------|---|--|---|------------------|------------------|--------------------------|---|
| Available  | Inspections     | Off Market                              | New Search   |   |                  |                  | Saved Searches           |   |
| Enter a keyword or fill in property options below. Your search will auto filter your property results. |                 | Туре:                                   | Residential  |   | For Sale/Rental: | PT & Auction     | 4                        |   |
| Address:   | Enter           | Street Suburb or ID<br>ype: Residential | Category:  | Acreage<br>Apartment<br>Block Of Units<br>House | +                | Status:          | Appraisal Available      | E |
| From \$:   |                 | Fo \$:                                  | State:   | NSW   |                  |                  |                          |   |
| Order: By Suburb  Search Advanced Search   |                 | Regions:                                | Blue Mountains & Surrounds Canterbury/bankstown Central Coast & Region Central Tablelands Central Tablelands |   |                  |                  |                          |   |
| • Add a Pi   | roperty         | _                                       | Suburb(s):   |   | Add              | (uncheck from be | elow to delete a Suburb) |   |
| Add a Project / Development  |                 | -                                       | Selected Suburbs:  |   |                  |                  |                          |   |
| • Add an A   | Appraisal / Pro | ospect Property                         |  |   |                  |                  |                          | - |
| _  |                 |   |  | Search  |                  |                  |                          |   |

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

| :: Advance                                   | d Property Se   | arch : New S   | earch   | 8 |
|--|---|--|---|---|
| New Search                                   | Search Results  | Refine Search  |   |   |
| Parking From                                 |   | To:  |   |   |
| Features:                                    | Air Cond<br>Alarm Sy<br>Area Vie<br>Beach F<br>Built-In V<br>Bush Re<br>City View | vstem<br>ws<br>ront<br>Vardrobes<br>treat  | Lift Installed<br>Ocean Views<br>Open Fire Place<br>Penthouse<br>Pets Allowed<br>Pool<br>Presting Homes | * |
| Assigned Staf                                | ☐ Joe Fran<br>☑ John Sm<br>☐ Jane Tho   | ks<br>ith  |   |   |
| Period Type:<br>Period From:<br>Save Search? | Last Modifie  | and an and the second sec | Period To: 0  |   |

2. Click on Search

| :: Advanced Property Search : John Smith's Appraisals(1 property found) |                         |                                  |                |  |  |  |
|---|-------------------------|----------------------------------|----------------|--|--|--|
| New Search  | John Smith's Appraisals | Refine Search                    | Saved Searches |  |  |  |
|   |                         |                                  |                |  |  |  |
|   | ID #1P0007<br>APPRAISAL | 1 Jones Boulevard.<br>Copacabana |                |  |  |  |
|   |                         |                                  |                |  |  |  |
|   |                         |                                  |                |  |  |  |
|   |                         |                                  |                |  |  |  |
|   |                         |                                  |                |  |  |  |
|   |                         |                                  |                |  |  |  |
|   |                         |                                  |                |  |  |  |

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

| New Search |  |                  | Saved Searches Saved Searches                        | -      |
|------------|--|------------------|--|--------|
| Type:      | Residential  | For Sale/Rental: | PT & Aucti John Smith's Appr                         | aisals |
| Category:  | Acreage<br>Apartment<br>Block Of Units<br>House  | Status:          | Appraisal<br>Available<br>Deposit Taken<br>Exchanged |        |
| State:     | NSW  | -                |  |        |
| Regions:   | Blue Mountains & Surro<br>Canterbury/bankstown<br>Central Coast & Region<br>Central Tablelands |                  | *  |        |
| Suburb(s): | Add  | (uncheck from b  | elow to delete a Suburb)                             |        |
|            | Selected Suburbs:  |                  |  |        |

### 3. Your Target List will appear on screen

| :: Advanced Property Search : John Smith's Appraisals(1 property found) |                         |                                  |                |  |  |  |  |
|---|-------------------------|----------------------------------|----------------|--|--|--|--|
| New Search  | John Smith's Appraisals | Refine Search                    | Saved Searches |  |  |  |  |
|   |                         |                                  |                |  |  |  |  |
|   | ID #1P0007<br>APPRAISAL | 1 Jones Boulevard.<br>Copacabana |                |  |  |  |  |
|   |                         |                                  |                |  |  |  |  |
|   |                         |                                  |                |  |  |  |  |
|   |                         |                                  |                |  |  |  |  |
|   |                         |                                  |                |  |  |  |  |
|   |                         |                                  |                |  |  |  |  |
|   |                         |                                  |                |  |  |  |  |

How do I edit a saved property search?

1. Open one of your saved searches.

| :: Advanced Property Search : John Smith's Appraisals(1 property found) |                         |                                  |                |  |  |  |  |
|---|-------------------------|----------------------------------|----------------|--|--|--|--|
| New Search  | John Smith's Appraisals | Refine Search                    | Saved Searches |  |  |  |  |
|   |                         |                                  |                |  |  |  |  |
|   | ID #1P0007<br>APPRAISAL | 1 Jones Boulevard.<br>Copacabana |                |  |  |  |  |
|   |                         |                                  |                |  |  |  |  |
|   |                         |                                  |                |  |  |  |  |
|   |                         |                                  |                |  |  |  |  |
|   |                         |                                  |                |  |  |  |  |
|   |                         |                                  |                |  |  |  |  |
|   |                         |                                  |                |  |  |  |  |

2. Click on the Refine Search tab

| New Search | John Smith's Appraisals   | Refine Search   | Saved S  | earches |
|------------|---|---|--|---------|
|            | 1 re  | cord(s) found from last   | search.  |         |
|            |   | Remove Saved Search   |  |         |
| Туре:      | Residential   | For Sale/Ren  | ntal: PT & Auction                                   | -       |
| Category:  | Acreage<br>Apartment<br>Block Of Units<br>House                                   | * Status:   | Appraisal<br>Available<br>Deposit Taken<br>Exchanged | *       |
| State:     | NSW   |   |  |         |
| Regions:   | Blue Mountains &<br>Canterbury/bankst<br>Central Coast & Ru<br>Central Tablelands | own<br>egion  |  | •       |
| Suburb(s): | Search  | and the second se | om below to delete a Subu                            | rb)     |

- 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.

| :: Advanced Property Search : John Smith's Appraisals(1 property found) |                         |                                  |                |            |  |  |
|---|-------------------------|----------------------------------|----------------|------------|--|--|
| New Search  | John Smith's Appraisals | Refine Search                    | Saved Searches | •          |  |  |
| 2   |                         |                                  |                | The second |  |  |
|   | ID #1P0007<br>APPRAISAL | 1 Jones Boulevard.<br>Copacabana |                |            |  |  |
|   |                         |                                  |                | 3          |  |  |
|   |                         |                                  |                |            |  |  |
|   |                         |                                  |                |            |  |  |
|   |                         |                                  |                |            |  |  |
|   |                         |                                  |                |            |  |  |
|   |                         |                                  |                | -          |  |  |

2. Click on the Refine Search tab.

| :: Advance | d Property Search :                             | John Smith's App   | raisals  |
|------------|---|--|--|
| New Search | John Smith's Appraisals                         | Refine Search  | Saved Searches                                       |
|            | 1 rec   | cord(s) found from last  | search.  |
|            | 1   | Remove Saved Search  | h  |
| Туре:      | Residential                                     | For Sale/Rei   | ntal: PT & Auction                                   |
| Category:  | Acreage<br>Apartment<br>Block Of Units<br>House | * Status:  | Appraisal<br>Available<br>Deposit Taken<br>Exchanged |
| State:     | NSW   |  |  |
| Regions:   | Blue Mountains & Canterbury/banksto             | own<br>egion   | *  |
| Suburb(s): |   | the second s | om below to delete a Suburb)                         |

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

| Available Inspections Off Market  | New Search    | Search Results Refi                                | ne Search  |                       |
|---|---------------|--|--|-----------------------|
| Enter a keyword or fill in property options below. Your search<br>will auto filter your property results. | Sort By: Prop | erty Status  |  | 2                     |
| Address:  |               | 3 ID #1P0001     4     AVAILABLE     2             | 1 Jones Street,<br>Copacabana<br>Michael Johnson (Vendor) Max<br>Hook (Vendor) | Contact Agent         |
| From \$: To \$:<br>Order: By Suburb   |               | 3         ID #1P0002           2         AVAILABLE | Unit 6/12 Del Rio Drive,<br>Copacabana<br>Michael Johnson (Vendor)             | Offers over \$960,000 |
| Add a Property  | 2             | 2 AVAILABLE  | 654 Victoria Street,<br>Sydney<br>Samantha Jones (Vendor)                      | \$2,250,000           |
| • Add a Project / Development   |               | 2 ID #1P0022                                       | Unit 6/13 Stuart Street,   | Offers over \$600,000 |
| <ul> <li>Add an Appraisal / Prospect Property</li> </ul>  |               |  | Manly<br>Jan Farthing (Vendor)   |                       |

3. 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.

| ID      | Address                 | Suburb     | Туре                                | Features                      | Listing Details   | Status                    | Advertised Price       | Contact(s) associated   | Agent(s) associated  | Notes   |
|---------|-------------------------|------------|-------------------------------------|-------------------------------|---|---------------------------|------------------------|---|--|---|
| #1P0001 | 1 Jones Street          | Copecsona  | For Sale:<br>Residential<br>(House) | 9e4:3<br>Dath:4<br>Park:2     | Authority: Exclusive<br>Method: Provale Treaty<br>Listed: 19-06-2011<br>Exploy: 17-11.2011                | Available<br>(18-01-2012) | Contact Agent          | Open Kapi Kay           Elemang Bernardi Com           H102 8009 A174 -           H102 8004 2533           H1041 222 833           Fenant Joseph Thomas           H1041 223 800 -           H1041 223 833           Heador Solicitor: David Nim           H1041 234 667           H102 800 1023           H102 8100 1000           H102 9100 1000           H104 1222 2333 | Linting Agent: Jane Smith<br>Selling Agent: Jane Smith         | Last 3 potens:<br>20 Oct.2001 Vender IS<br>Contact on refum for 2<br>property update.<br>Holidaging in Vanuallu<br>with wither Woh noticas<br>competition<br>Returning 20.10 (11<br>(Adoded 5)) Matanie<br>Thormeal |
| #1P0002 | Unit 6/12 Del Rio Drive | Copacabana | For Sale:<br>Residential<br>(Villa) | Bed: 3<br>Bath: 2<br>Park: 2  | Authority: Exclusive<br>Method: Auction<br>(20-10-2011 12:00)<br>Listed: 10-09-2011<br>Expiry: 15-12-2011 | Available<br>(22-11-2011) | Offers over \$960,000  | Vendor: Michael Johnson<br>(E) mick@gmail.com<br>(H) 02 9564 2533<br>(M) 0411 222 333   | Listing Agent: Jane Smith<br>Listing Agent: Marcos<br>Thompson | Access Details:<br>Key no:17  |
| #190029 | 3 Smith Street          | Copecabana | For Sale:<br>Residential<br>(House) | Bed: 3<br>Bieth: 2<br>Park: 2 | Authority: Exclusive<br>Method: Private Treaty<br>Listed: 05-04-2012<br>Expiry: 04-07-2012                | Available<br>(05-04-2012) | Offers over 51 million |   | Listing Agent Jané Smilly                                      |   |

# **Preview Property**

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

# How can I preview my property?

1. Search for your Property and open the Property Card

| :: Listing : ID#1F | 0001 - 1 Jones Stree | t, Copacabana     |           |                     | 8 |
|--------------------|----------------------|-------------------|-----------|---------------------|---|
|                    | P & @ Z t            |                   | Ilia      | 👼 🛛 🖓 Full Vie      | w |
| General For Sale   | Features Open Homes  | Agents & Contacts | Resources | Commission          |   |
| Status:            | Available            |                   |           | and /               | * |
| For Sale/Rental:   | For Sale             |                   |           |                     |   |
| Type: *            | Residential          |                   |           | - ALAUL DU          |   |
| Category: *        | House                |                   |           | Copy This Property  |   |
| Investment?:       |                      |                   |           | Vendor Preview Link |   |
| 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       |                     |   |
| 111.4 - A.J.J      |                      | 19 - M            |           |                     | * |
|                    | Save                 |                   |           |                     |   |

2. Click on the Property Preview Action Icon **1**. This will open a new tab in your browser with a Preview of what your property will look like on your website.

| ones Street, Copacabana |                   | 3 beds   4 baths   2 car  |
|-------------------------|-------------------|---|
|                         |                   | 😫 print this property 🛛 email to a frien  |
|                         | Luxury Balinese   | Inspired Residence  |
| - Other Ci              | For Sale - Contac | t Agent   |
|                         |                   | n this one! Relax in your open plan living area,opening onto a<br>ing area overlooking the infinity pool and breathtaking ocea    |
|                         |                   | ooms, all contain en suites and built in wardrobes, the maste<br>rees of ocean views. With automatic block out blinds for ultimat |
|                         | Property Over     | view  |
|                         | Property ID:      | 1P0001  |
|                         | Property Type:    | House   |
|                         | Garage:           | 2   |
|                         | Outgoings:        | Water Rates: \$250 Quarterly<br>Council Rates: \$205 Quarterly<br>Land Tax: \$652 Quarterly                                       |
| act                     | Features          | Air Conditioning<br>Heating<br>Area Views   |
| John Smith              |                   | Alarm System  |
|                         |                   | Pool  |

# **Vendor Preview Link**

## How do I create a Vendor Preview Link?

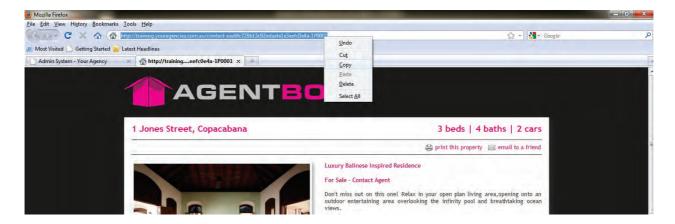
This page is used to check whether your details are correct before uploading the property to the web, you can send the vendor this link to preview the property.

| :: Listing : ID#1P0001 - 1 Jones Street, Copacabana |          |              |            |                   |           | • 8        |            |
|---|----------|--------------|------------|-------------------|-----------|------------|------------|
| # 0   |          |              | 021        | 1 🖻 🕿 🍡           | - Ma      | á          | Full View  |
| General   | For Sale | Features     | Open Homes | Agents & Contacts | Resources | Commission |            |
| Status:   |          | Available    |            |                   | -         | 1          |            |
| For Sale/   | Rental:  | For Sale     | •          |                   |           |            |            |
| Type: *   |          | Residential  |            |                   |           | - Aller    |            |
| Category:   | *        | House        | •          |                   |           | Copy Thi   | s Property |
| Investmen   | nt?:     |              |            |                   |           |            | eview Link |
| Sale Meth   | nod:     | Private Trea | ty 💌       |                   |           |            |            |
| Authority:  |          | Exclusive    |            |                   |           |            |            |
| Property  | Name:    |              |            |                   |           |            |            |
| Level No.   | ş        | 0            | nit No.:   | Street No.:       | 1         |            |            |
| Street Na   | me: *    | Jones        |            | Street Type: *    | Street    | •          |            |
| Suburb: *   |          | COPACABA     | NA (2251)  | State: *          | NSW       | •          |            |
| 111.4   |          |              | 11 A A     | 21-11             |           |            |            |
|   |          | Save         |            |                   |           |            |            |

1. Search for your Property and open the Property Card

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.

| :: Listing : ID#1P0001 - 1 Jones Street, Copacabana |                     |                   |           |            | 08        |
|---|---------------------|-------------------|-----------|------------|-----------|
|   | P & @ P 1           |                   | 5 m       | ā          | Full View |
| General For Sale                                    | Features Open Homes | Agents & Contacts | Resources | Commission |           |
| Status:   | Available           |                   |           | and        | 17:       |
| For Sale/Rental:                                    | For Sale            |                   |           |            |           |
| Туре: *   | Residential         |                   |           | - Aller    |           |
| Category: *   | House               |                   |           | Copy This  | Property  |
| Investment?:  |                     |                   |           | Vendor Pre |           |
| 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       |            |           |
| 111.4 - A.J.J 73.                                   |                     | 21-14             |           |            | -         |
|   | Save                |                   |           |            |           |

1. Search for your Property and open the Property Card



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.

| Email Listing :  | 1P0001 - 1 Jones Street, Copacabana   | 8   |
|------------------|---|-----|
| Create New Email | View Sent Email   |     |
| Reply To:        | John Smith (john@agentbox.com.au)   | Ě   |
| Add Recipient:   | Please enter Name Add   |     |
| Send To: *       | <ul> <li>Image: Content of the set of t</li></ul> | ji, |
| Subject: *       |   |     |
| Message: *       | B I U E E E Paragraph ▼ E E E<br>X A C O A C Y T A Y V X Y T O F E<br>A Y V X X Ω A A   |     |
|                  |   | *   |

### 3. Click Send

| 8 | Listing : 1P0001 - 1 Jones Street, Copacabana | Email Listing :          |
|---|---|--------------------------|
|   | New Email View Sent Email                     | Create New Email         |
|   |   | Subject: *<br>Message: * |
| 1 | Send  |                          |

# **SMS Property Contacts**

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

| :: Listing : ID#1P0001 - 1 Jones Street, Copacabana |          |              |            |                   | 08        |            |            |
|---|----------|--------------|------------|-------------------|-----------|------------|------------|
| # @   |          |              | 0 1        |                   | 5 14      | ă.         | Full View  |
| General   | For Sale | Features     | Open Homes | Agents & Contacts | Resources | Commission |            |
| Status:   |          | Available    |            |                   |           | -          | 17:        |
| For Sale/F  | Rental:  | For Sale     |            |                   |           |            |            |
| Type: *   |          | Residential  | -          |                   |           | - Think    |            |
| Category:   | *        | House        |            |                   |           | Copy This  | s Property |
| Investmen   | nt?:     |              |            |                   |           |            | eview Link |
| Sale Meth   | nod:     | Private Trea | ty 💌       |                   |           |            |            |
| Authority:  |          | Exclusive    |            |                   |           |            |            |
| Property I  | Name:    |              |            |                   |           |            |            |
| Level No.   | р.       | 0            | nit No.:   | Street No.:       | 1         |            |            |
| Street Na   | me: *    | Jones        |            | Street Type: *    | Street    |            |            |
| Suburb: *   |          | COPACABA     | NA (2251)  | State: *          | NSW       |            |            |
| 111.2. 4.3.3.                                       |          |              | 11.11.11   | 21-14             |           |            |            |
|   |          | Save         |            |                   |           |            |            |

### 1. Search for your Property and open the Property Card

2. Click on the SMS Action icon  $oxput{III}$ 

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 : 1 | P0001 - 1 Jones Street, Copacabana  | 8  |
|-----------------|---|----|
| Create New SMS  | View Sent SMS   |    |
| Reply To:       | John Smith (0408676707)   |    |
| Add Recipient:  | Please enter Name Add   |    |
| Send To: *      | <ul> <li>☑ (Listing Agent, Selling Agent) - John Smith (0408676707)</li> <li>☑ (Vendor) - Michael Johnson (0411 222 333)</li> </ul> | E. |
| SMS Message: *  | Characters typed in so far: 0 (160 characters per sms)<br>Your credits (standard SMS messages) remaining: 95                        |    |

#### 3. Click Send

| SMS Listing : 1P0001 - 1 Jones Street, Copacabana |  |   |  |  |
|---|--|---|--|--|
| Create New SMS<br>SMS Message: *                  | View Sent SMS  |   |  |  |
|   | Characters typed in so far: 0 (160 characters per sms)<br>Your credits (standard SMS messages) remaining: 95<br>A standard SMS message is 160 characters. Messages greater than 160 characters<br>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(.)   | 4 |  |  |

## **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

| :: Listing : ID#1P0001 - 1 Jones Street, Copacabana |                     |                   |           |  | I I I I I I I I I I I I I I I I I I I |
|---|---------------------|-------------------|-----------|--|---------------------------------------|
|   |                     |                   | 5 Illa    | in the second se | Full View                             |
| General For Sale                                    | Features Open Homes | Agents & Contacts | Resources | Commission   |                                       |
| Status:   | Available           |                   |           | ates   |                                       |
| For Sale/Rental:                                    | For Sale            |                   |           |  |                                       |
| Type: *   | Residential         |                   |           | - AL   |                                       |
| Category: *   | House               |                   |           | Conv This  | Property                              |
| Investment?:  |                     |                   |           |  | eview Link                            |
| Sale Method:  | Private Treaty      |                   |           |  |                                       |
| Authority:  | Exclusive           |                   |           |  |                                       |
| Property Name:                                      |                     |                   |           |  |                                       |
| Level No.:  | Unit No.:           | Street No.:       | 1         |  |                                       |
| Street Name: *                                      | Jones               | Street Type: *    | Street    |  | 1.0                                   |
| Suburb: *   | COPACABANA (2251)   | State: *          | NSW       |  |                                       |
| III.d. Address S.                                   |                     | 19 - M            |           |  |                                       |
|   | Save                |                   |           |  |                                       |

- 2. Click on the E-Newsletter Action icon
- 3. Select a template

| Step 1 of 3 - Select a template |                  |                          | View Saved E-Newsletters View Sent E-Newsletters   |
|---------------------------------|------------------|--------------------------|--|
| Select Template                 | Delivery Details | Edit & Send E-Newsletter |  |
|                                 |                  | AGENTROX'                |  |
|                                 |                  | The second second        |  |
|                                 |                  |                          | AGENTROX"  |
|                                 |                  |                          |  |
|                                 |                  | Annual Man Bearing 1     |  |
|                                 |                  |                          | Levid 52/6 Support, mater  |
|                                 |                  | diago firm theory 1      | Perturbase with identity varies at the first file Cover     The first - Exection     The fi            |
|                                 |                  |                          | <ul> <li>The amount of the first off areas in a transmission of the state of th</li></ul> |
|                                 |                  | 1                        |  |
| 100                             |                  | General Enews            | 120  |
| (ALL)                           |                  |                          | Let .  |

### 4. Refine the recipients list

5. Enter the E-Newsletter Subject.

| Send E-Newsle                    | etter  |  |  | • 6                     |
|----------------------------------|--|--|--|-------------------------|
| Step 2 of 3 - Edit y             | Step 2 of 3 - Edit your delivery details   |  |  | View Sent E-Newsletters |
| Select Template                  | Delivery Details   | Edit 8 Send E-Newsletter   |  |                         |
| Delivery To:                     | 7 record(s) found.   |  |  |                         |
| Refine<br>Tick All<br>Untick All | <ul> <li>Michael Jones</li> <li>Sam Jones (sa</li> <li>Samantha Jon</li> <li>Mary May (mn</li> </ul> | ary.brown@hotmail.com)<br>(mick@gmail.com)<br>am@hotmail.com)<br>es (samantha@hotmail.com) |  |                         |
| Reply From:                      | John Smith (john   | @agentbox.com.au)  |  |                         |
| Subject: *                       | Check out our spe  | ectacular new property!  |  |                         |
| « Previous Ste                   | P  |  |  | Save & Proceed »        |

6. Create E-Newsletter

| Send E-Newsle                                  | etter  |  |                                   |                            |
|--|--|--|-----------------------------------|----------------------------|
| 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                 |                                   |                            |
|  | -Newsletter, select a<br>d lines to edit that se | nd add your desired section(s)<br>ction. | from the drop down box. Onc       | e it appears, simply click |
| Add Section:                                   |  | Add                                      |                                   |                            |
|  |  | Not interested anymore? U                | nsubscribe                        |                            |
| -  | GENT <mark>BO</mark>                             | ×  | Newslette                         | r Update 💡                 |
|  |  | ; In this Issue ;                        | *                                 |                            |
|  | day, 17th November 20                            | 011                                      | 02 9209 4174 - <u>office@agen</u> | tbox.com.au                |
| 1  | <i>Contact's first name</i> ,<br>egards<br>Smith |  |                                   |                            |
| « Previous Ste                                 | p Send for 1                                     | esting Save                              | Preview                           | Send Now                   |

| Send E-Newsle                                  | etter            |                          |   | 08                         |
|--|------------------|--------------------------|---|----------------------------|
| 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 |   |                            |
| Add Section:                                   | ture Property    | Add                      | s) from the drop down box. Onc<br>reet, Copacabana<br>rese Inspired Residence | e it appears, simply click |
| « Previous Ste                                 | p Send for 1     | 3 🛏 4 🕯<br>view propert  |   | * Back to Top<br>Send Now  |

7. <u>Add additional content</u> 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. <u>Search for your Property</u> and open the <u>Property Card</u> or access the log an enquiry action icon from the property search results panel

| :: Listing : ID#1P0001 - 1 Jones Street, Copacabana |                   |                      |           |            |            |  |  |  |
|---|-------------------|----------------------|-----------|------------|------------|--|--|--|
|   | P 2 0 Z           |                      | 5 Ilia    |            | Full View  |  |  |  |
| General For Sale                                    | Features Open Hom | es Agents & Contacts | Resources | Commission |            |  |  |  |
| Status:   | Available         | -                    |           | 100        | 17/ -      |  |  |  |
| For Sale/Rental:                                    | For Sale          | -                    |           |            |            |  |  |  |
| Type: *   | Residential       | -                    |           | - athing   | -          |  |  |  |
| Category: *   | House             | -                    |           | Conv This  | Property   |  |  |  |
| Investment?:  |                   |                      |           |            | eview Link |  |  |  |
| Sale Method:  | Private Treaty    | -                    |           |            |            |  |  |  |
| Authority:  | Exclusive         | -                    |           |            |            |  |  |  |
| Property Name:                                      |                   |                      |           |            |            |  |  |  |
| Level No.:  | Unit No.:         | Street No.:          | 1         |            |            |  |  |  |
| Street Name: *                                      | Jones             | Street Type: *       | Street    |            | 1.0        |  |  |  |
| Suburb: *   | COPACABANA (2251) | State: *             | NSW       |            |            |  |  |  |
| 184- 8337.  | Save              | 4.6                  | 0         |            |            |  |  |  |

| A Properties  | ✓ Property Results   | 0 |
|---|--|---|
| Available         Inspections         Off Market           Enter a keyword or fill in property options below. Your search will auto filter your property results. (1 found)         Your search will be a | ID #1P0001<br>1 Jones Street<br>Copacabana<br>Contact Agent<br>AVAILABLE |   |
| Address:  No  Jones    For:  Sale  Type:  Residential    Features:  Image: Constraint of the second secon                               |  |   |
| <ul> <li>Add a Property</li> <li>Add a Project / Development</li> <li>Add an Appraisal / Prospect Property</li> </ul>   |  |   |

2. Click on the Log an Enquiry action icon 😱

| Enquiry Type:                    | General                           |
|----------------------------------|-----------------------------------|
| Enquiry Source:                  |                                   |
| Select Contact:                  | Enter Name, Phone or Email        |
| Enquiry Date:                    | 29 11 2011 II 10 V PMV            |
| Description: *                   |                                   |
| Annian to Chaffe *               | Office Admin                      |
|                                  | Joe Franks John Smith Jane Thomas |
| Assign to Staff: * SMS Reminder: | John Smith                        |

### 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)

| Enquiry Type:      | Buyer  |
|--------------------|--|
| Enquiry Source:    | Open Homes Inspection  |
| Select Contact:    | Mary May   |
| Enquiry Date:      | 28 10 2011 C 01 - 15 - PM-   |
| Description: *     | Would like to arrange another inspection. Please contact her ASAP via email. |
|                    | Office Admin   |
| Assign to Staff: * | □ Joe Franks<br>□ John Smith<br>□ Jane Thomas                                |

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?

| 合 Listing - ID#1P0001            | :: Listing : ID#1P0001 - 1 Jones Street, Copacabana                  |        |
|----------------------------------|--|--------|
| < Back to Properties             |  | II Vie |
| > Notes History                  | General For Sale Features OFI Agents & Contacts Resources Commission |        |
| > Recent Enquiries               | Status: Available  Copy This Property                                |        |
| > Property History               | For Sale/Lease: For Sale   |        |
| > Inspections (4) & Feedback (3) | Type: * Residential  |        |
| > Activity Schedules             | Category: * House  |        |
| > Offers Made(1)                 | Investment?:   |        |
| > Contracts Requested(1)         | Sale Method: Private Treaty  |        |
| > Property Modifications Log     | Authority: Exclusive  Property Name:                                 |        |
| > Links to Portals               | Level No.: Unit No.: Street No.: 1                                   |        |
|                                  | Street Name: * Jones Street Type: Street                             |        |
| > Help Text                      | 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. 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?

| Listing - ID#1P0001              | :: Listing : ID#1P0001 - 1 Jones Street, Copacabana                  |
|----------------------------------|--|
| < Back to Properties             | 👬 @ 🖩 🖻 🖗 🎓 🐨 🕼 🛗 🖹 🚘 🦜 📶 ج 🚳 🛛 Full View                            |
| > Notes History                  | General For Sale Features OFI Agents & Contacts Resources Commission |
| > Recent Enquiries               | Status: Available  Copy This Property                                |
| > Property History               | For Sale/Lease: For Sale Vendor Preview Link                         |
| > Inspections (4) & Feedback (3) | Type: * Residential  |
| > Activity Schedules             | Category: * House  |
| > Offers Made(1)                 | Investment?:   |
| > Contracts Requested(1)         | Sale Method: Private Treaty  Authority: Exclusive                    |
| > Property Modifications Log     | Authority: Exclusive  Property Name:                                 |
| > Links to Portals               | Level No.: Unit No.: Street No.: 1                                   |
| > Help Text                      | 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   |
|                                  | Save   |

2. Click on Recent Enquiries on the left property panel

| 合 Lis     | ting - ID#1P0001   |   |
|-----------|--|---|
| < Back 1  | to Properties  |   |
| > Notes   | History  |   |
| ∽ Recer   | nt Enquiries   |   |
| Date      | Details  |   |
|           | 1 - Contract Request - created by:<br>mith More Detail »   | - |
|           | 1 - General Enquiry - created by: John<br>More Detail »  |   |
| - 1 Jon   | 1 - Buyer Enquiry - Listing ID #1P0001<br>es Street, Copacabana - created by:<br>imith More Detail » | E |
|           | 1 - General Enquiry - created by: John<br>More Detail »  |   |
| • 04/11/1 | 1 - General Enquiry - created by: John   | - |
| Ce        | mtacts   |   |
| > Prope   | rty History  |   |
| > Buyer   | Feedback & Vendor Report(1)  |   |
| > Offers  | Made(1)  |   |
| > Contra  | acts Requested(1)  |   |
| > Prope   | rty Modifications Log  |   |
| > Links   | to Portals   |   |
| > Help 1  | Text   |   |

3. Click on the green Contacts button

4. The list of contact will open. Use the action icons in the set of the set

| ContactAssigned StaffLast ContactedMichael JohnsonJohn SmithSamantha JonesJohn Smith10/11/11 | Contact Info |
|--|--------------|
|  | OMB          |
| Samantha Jones John Smith 10/11/11   |              |
|  | 0 11         |
| Mary May John Smith 19/08/11   | @ HZ         |
| Hayley Rees John Smith 10/11/11  |              |
| Jane Smith John Smith  | MIZ.         |

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
- $_{\odot}$  Through the Fast Finds Results Panel

### Property Card

| :: Listing : ID#1    | P0001 - 1 Jones Stree | et, Copacabana    |           |            | I I I I I I I I I I I I I I I I I I I    |
|----------------------|-----------------------|-------------------|-----------|------------|--|
|                      |                       |                   | 5 m       | ā          | Full View                                |
| General For Sale     | Features Open Homes   | Agents & Contacts | Resources | Commission |  |
| Status:              | Available             |                   |           | -          | 17.                                      |
| For Sale/Rental:     | For Sale              |                   |           | - AND      |  |
| Type: *              | Residential           |                   |           | - AND      | -  |
| Category: *          | House                 |                   |           | Copy This  | Dronerty                                 |
| Investment?:         |                       |                   |           | Vendor Pre | 1. |
| Sale Method:         | Private Treaty        |                   |           |            |  |
| Authority:           | Exclusive             |                   |           |            |  |
| Property Name:       |                       |                   |           |            |  |
| Level No.:           | Unit No.:             | Street No.:       | 1         |            |  |
| Street Name: *       | Jones                 | Street Type: *    | Street    |            | 1.00                                     |
| Suburb: *            | COPACABANA (2251)     | State: *          | NSW       |            |  |
| 118.4 × 4.4.4.4.4.5. |                       | 19 - M            |           |            |  |
|                      | Save                  |                   |           |            |  |

- 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

| Assigned Staff   | Last Contacted   | Contact Info   |
|------------------|--|--|
| Melanie Thompson |  | 07   |
| John Smith       |  | @ Ma Z   |
| John Smith       | 10/11/11   | Q III  |
| John Smith       | 19/08/11   | 0 11   |
| John Smith       |  | @ 12   |
| John Smith       |  |  |
|                  | Melanie Thompson<br>John Smith<br>John Smith<br>John Smith<br>John Smith | Melanie Thompson         John Smith         John Smith         John Smith         John Smith         John 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

| A Prop                              | erties   |   | ✓ Property Results   | 8 |
|-------------------------------------|--|---|--|---|
|                                     | Inspections<br>ord or fill in property<br>your property result | Off Market:<br>options below. Your sear<br>s. (1 found) | ID #1P0001<br>1 Jones Street<br>Copacabana<br>Contact Agent<br>AVAILABLE |   |
| For: [<br>Features: [<br>From \$: [ |  | Terrore terrore T                                       |  |   |
| • Add a P                           | roperty  |   |  |   |
| • Add a P                           | roject / Devel   | opment  |  |   |
| • Add an /                          | Appraisal / Pro  | ospect Property   |  |   |
|                                     |  |   |  | + |

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

| Contact         | Assigned Staff   | Last Contacted | Contact Info |  |
|-----------------|------------------|----------------|--------------|--|
| Colin Fairlight | Melanie Thompson |                | 012          |  |
| Michael Johnson | John Smith       |                | 0117         |  |
| Samantha Jones  | John Smith       | 10/11/11       | Q III Z      |  |
| Mary May        | John Smith       | 19/08/11       | 0 11         |  |
| Charles Roberts | John Smith       |                | @ 12         |  |
| Jane Smith      | John Smith       |                |              |  |

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?

| :: Listing : ID#1F | 20001 - 1 Jones Stree | et, Copacabana    |           | • 8                 |
|--------------------|-----------------------|-------------------|-----------|---------------------|
|                    |                       |                   | In        | 5 Full View         |
| General For Sale   | Features Open Homes   | Agents & Contacts | Resources | Commission          |
| Status:            | Available             |                   |           | and -               |
| For Sale/Rental:   | For Sale              |                   |           |                     |
| Type: *            | Residential           |                   |           |                     |
| Category: *        | House                 |                   |           | Copy This Property  |
| Investment?:       |                       |                   |           | Vendor Preview Link |
| 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       |                     |
| 1184- Adda7.       | Save                  | 3 A               |           |                     |

- 2. Click on the Add Feedback by Appointment action icon
- 3. Enter the date and time of the inspection

| / Appointment  |
|----------------|
| 07 11 2011     |
| 10 • 00 • AM • |
| 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 F                             | eedback  |
|--|--|
| Add Feedback                             | (1) Other Feedback   |
| 1 Jones Street, Co<br>07/11/2011 10:00am | Contraction of the second seco |
| Contact: Ma                              | гу Мау   |
| Price Feedback                           |  |
| Comments:                                |  |
| Save & Add Ano                           | Uner Save & View Contact   |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |

| Inspectio                        | n Feedback                      |
|----------------------------------|---------------------------------|
| Add Feedba                       | ck (1) Other Feedback           |
| 1 Jones Stree<br>07/11/2011 10:0 | et, Copacabana<br>0am - 10:30am |
| First Name:                      | Sally                           |
| Last Name:                       | Raglan                          |
| Email:                           | sally@bigpond.com               |
| Mobile No.:                      | 0412565326                      |
| Home No.:                        |                                 |
| Work No.:                        |                                 |
| Suburb:                          |                                 |
| Subscribe                        | 9?                              |
| Price Feedb                      | ack \$: 1150000                 |
| Contract                         | Taken Hot                       |
| 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?

|                   |                   | - III.   | 5   | Full View  |
|-------------------|-------------------|--|---|--|
| atures Open Homes | Agents & Contacts | Resources  | Commission  |  |
| ilable 💌          |                   |  | AL  | 17.  |
| Sale 💌            |                   |  | - WAT   |  |
| sidential 💌       |                   |  |   |  |
| JSe 💌             |                   |  | Conv This   | Property   |
|                   |                   |  |   |  |
| vate Treaty       |                   |  |   |  |
| clusive 🔹         |                   |  |   |  |
|                   |                   |  |   |  |
| Unit No.:         | Street No.:       | 1  |   |  |
| es                | Street Type: *    | Street   |   | 1.00   |
| PACABANA (2251)   | State: *          | NSW  | •   |  |
|                   | 19 - M            |  |   |  |
| Save              |                   |  |   |  |
|                   | Atores Open Homes | ilable  Sale  Sale | Open Homes       Agents & Contacts       Resources         Itable       •         Sale       •         idential       •         se       •         ate Treaty       •         lusive       •         Unit No.:       Street No.:       1         ss       Street Type: *       Street         ACABANA (2251)       State: *       NSW | Open Homes       Agents & Contacts       Resources       Commission         Itable |

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

| :: Listing : #1P     | 0001 - Copacabana : Add a Note 🏼 🥙  |
|----------------------|---|
| Create New Note      | View Previous Notes   |
| Note Date: *         | 20 10 2011 9 04 V 45 V PMV  |
| 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.<br>Returning 30.10.11 |
| Assign Contact:      | Ado   |
| Selected Contact(s): | Michael Johnson   |
| Publish Note:        | Publishing this note will allow all relevant staff to view this note.                           |
| Add as a Task:       |   |
|                      | Save  |

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.

| Listing - ID#1P0001   |   |
|---|---|
| < Back to Properties  |   |
| ✓ Notes History   |   |
| <ul> <li>20/10/11 - Vendor is going on holiday.<br/>Contact on return for a property update.</li> <li>Holidaying in Vanuatu with wife. Won holiday<br/>through a radio competition. Returning 30.10.11</li> <li>created by: John Smith More Detail »</li> </ul> | * |
| > Recent Enquiries  |   |
| > Property History  |   |
| > Buyer Feedback & Vendor Report(1)   |   |
| > Offers Made(1)  |   |
| > Contracts Requested(1)  |   |
| > Property Modifications Log  |   |
| > Links to Portals  |   |
| > Help Text   |   |

See also...

Notes History

# Add a Meeting

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

| :: Listing : ID#1 | P0001 - 1 Jones Stree | et, Copacabana    |           |            | 00         |
|-------------------|-----------------------|-------------------|-----------|------------|------------|
| # @ # 0           |                       |                   | 5 m       | ă.         | Full View  |
| General For Sale  | Features Open Homes   | Agents & Contacts | Resources | Commission |            |
| Status:           | Available             |                   |           | ates       | 17 -       |
| For Sale/Rental:  | For Sale              |                   |           |            |            |
| Type: *           | Residential           |                   |           | - ANA      |            |
| Category: *       | House                 |                   |           | Conv This  | Property   |
| Investment?:      |                       |                   |           |            | eview Link |
| Sale Method:      | Private Treaty        |                   |           |            |            |
| Authority:        | Exclusive             |                   |           |            |            |
| Property Name:    |                       |                   |           |            |            |
| Level No.:        | Unit No.:             | Street No.:       | 1         |            |            |
| Street Name: *    | Jones                 | Street Type: *    | Street    | •          | 1.00       |
| Suburb: *         | COPACABANA (2251)     | State: *          | NSW       |            |            |
| 1184- Addisson 9. | Save                  | 19 - M            |           | -          |            |

2. Click on Add a Meeting action icon

| Create New Meetin                                | ng. View Future Meetings View Past Meetings   |     |
|--|---|-----|
| Meeting Starts: *<br>Meeting End:<br>Headline: * | 30     11     2011     05     00     PM       30     11     2011     06     00     PM | Í   |
| Description: *                                   |   | -10 |
| Responsible Staff:                               | * Office Admin  |     |

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

| :: Listing : 1P0                                 | 001 - Copacabana : Add a Meeting   | 8     |
|--|--|-------|
| Create New Meeting                               | View Future Meetings View Past Meetings  |       |
| Meeting Starts: *<br>Meeting End:<br>Headline: * | 02     11     2011     09     00     AM       02     11     2011     10     00     AM       Jones St Vendor Update | *     |
| Description: *                                   | Vendor has returned from holiday. Meeting has been set up to inform vendor of all property updates.                | E     |
| Responsible Staff: *                             | Office Admin     Joe Franks     John Smith     Jane Thomas     Molenie Themasen                                    |       |
| SMS Reminder:                                    | Tick here if you want to send SMS reminder to staff member(s).   | _     |
| Assign Contact:                                  |  | 400 + |

#### 4. Click on Save

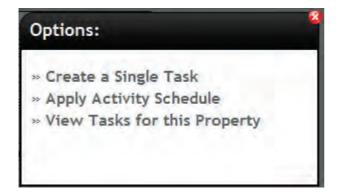
The meeting will be added to your Agentbox calendar and a notification email will be sent to the assigned staff.



## **Tasks & Activity Schedules**

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

- 1. <u>Search for your Property</u> and open the <u>Property Card</u>
- 2. Click on the 'Tasks' icon 📗



3. Select <u>Create a Single Task</u> <u>Apply Activity Schedule</u> 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

| Task   |  | Der                             | Responsible Staff Due      |          | Done?  | C                  | -     |
|--|--|---------------------------------|----------------------------|----------|--------|--------------------|-------|
| 1.740  |  | 1000                            |                            | Due      | Done : | Contact(s)         | -     |
| General Enquiry  |  | John Smith                      |                            | 04/11/11 | по     | Michael<br>Johnson | Delet |
| Buyer Enquiry - Listing ID #1P0001 -<br>1 Jones Street, Copacabana |  | John Smith,<br>Melanie Thompson |                            | 18/11/11 | no     | Samantha<br>Jones  | Delet |
| Send letter  |  | John Smith                      |                            | 18/11/11 | no     | Samantha<br>Jones  | Delet |
| Make a phone call  |  |                                 | n Smith,<br>Ianie Thompson | 20/11/11 | no     | Samantha<br>Jones  | Delet |

You may also be interested in: / You may also want to know: <u>How to edit a task</u> <u>How to attach a file to a task</u> <u>How to complete a task</u>

## Send a Letter to Property Contacts

How do I send a Letter via a property?

| :: Listing : ID#1F | 0001 - 1 Jones Stree | et, Copacabana    |           |            | 00         |
|--------------------|----------------------|-------------------|-----------|------------|------------|
|                    |                      |                   | - IIIa    | 5          | Full View  |
| General For Sale   | Features Open Homes  | Agents & Contacts | Resources | Commission |            |
| Status:            | Available            |                   |           | 1          | -7-        |
| For Sale/Rental:   | For Sale             |                   |           |            |            |
| Туре: *            | Residential          |                   |           | - Allen    |            |
| Category: *        | House                |                   |           | Conv This  | s Property |
| Investment?:       |                      |                   |           |            | eview Link |
| 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       | •          |            |
| 111.4 · A J J      |                      | * *               |           |            | -          |
|                    | Save                 |                   |           |            |            |

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 <u>letter variables</u> (or merge fields) are added to the property.

4. Click the Letter Generator action icon

| ep 1 of 3 - Sele | t Template                    |   |                   | View created lette |
|------------------|-------------------------------|---|-------------------|--------------------|
| emplates Mo      | lify The Lener                | Letter Distribution   |                   |                    |
| elect a Templat  | e: Purchaser                  | Sales Advice  |                   |                    |
| :: Template Pre  | /lew ::                       |   |                   |                    |
| Send From:       | Select                        | Staff Member (By default w  | vill be yourself) |                    |
| Purchaser Sale   | Advice                        |   |                   |                    |
| Property De      | Pi<br>Fa<br>Er<br>Al          | Cornwallis Street, Eveleigh, f<br>hone: 02 9209 4174<br>ix: 02 9310 7232<br>nail: office@agentbox.com<br>BN: 11 222 112 142 |                   | Ē                  |
| Property Addres  |                               | 4   |                   | -                  |
| Contract Price:  | s. {sprop_roc<br>{\$sold_pric |   |                   | Deposit Held:      |
| *                | 117                           |   |                   | · *                |
|                  |                               |   |                   | -                  |
|                  |                               |   |                   | Save & Proceed     |

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

| and the second second | 1                                     |  | a second a second at   | y                      |                       |
|-----------------------|---------------------------------------|--|--|------------------------|-----------------------|
| nplates               | Modify T)                             | he Letter  | Letter Distribution  |                        |                       |
| end Fron              | e Preview<br>n:<br>ankyou for<br>loc} | Offer Notific<br>Prospectin<br>Prospectin<br>Prospectin<br>Purchaser<br>Purchaser<br>Vendor Ex<br>Vendor Set<br>Vendor Sol | inkyou for Listing Letter<br>cation Letter<br>g Letter Auction Invitation<br>g Letter Buyers Waiting<br>g Letter OFI Invite<br>g Letter Recent Sale<br>Exchange Letter<br>Solicitor Exchange Letter<br>Solicitor Exchange Letter<br>thement Letter<br>icitor Exchange Letter<br>icitor Request for Contr | er                     | Copy                  |
| Dear {\$ve            | ndor_dear}                            | Vendor Sol<br>Vendor The   | icitor Request for Contr<br>inkyou for Listing Letter<br>Office Templates  | acts: Private Treaty   |                       |
| Your Prop             | oosed Sale                            | Congratula<br>Contract E   | tions - Buyer<br>tions - Vendor<br>xchanged - Buyer<br>xchanged - Vendor   |                        |                       |
| agency. N             | pal I would I                         | Deposit Ad<br>property is  | vice - Buyer Solicitor<br>a huge responsibility ar   | d we will endeavour to | rexclusive<br>hieve a |
|                       |                                       |  |  |                        |                       |

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.

| tep 2 of 3 - Modify The Letter  |  | View created letters :  |
|---|--|---|
| Modify The Letter   | Letter Distribution                          |   |
| B Z U   E E E Forma<br>X 🐴 🕰 🛍 🛍   📆 📝 💝 🕶  |  |   |
| 1st December 2011<br>Mr Michael Johnson<br>PO Box 458<br>Sydney NSW 2000                      |  |   |
| Dear Michael  |  | Ξ   |
| Your Proposed Sale of 1 Jones Street, Cop   | acabana, NSW 2251                            |   |
| As principal I would like to take this opport<br>property is a fluge responsibility and we wi |  | ency as your exclusive agency. Marketing a essful result for you. |
| Throughout the marketing campaign many<br>your convenience.                                   | rissues can arise. If you would like to disc | uss these please do not hesitate to contact me at                 |
| with you all the year heat with your earner   | tion and a cusacraful autoema                |   |
| « Previous Step   |  | Save & Proceed »  |

### 7. Click Save & Proceed

8. You can now click Print, to generate as a PDF download or click WinWord to export to Microsoft word.

| Property       | Letter :: Listing                          | : #1P0001 - Copacabana                                    | 4                                |
|----------------|--|---|----------------------------------|
| Step 3 of 3 -  | Letter Distribution                        |   | View created letters »           |
| Templates      | Modify The Letter                          | Letter Distribution                                       |                                  |
| Distribution I | Method: Print as PDF                       | *   |                                  |
| Print this     | Letter ::-                                 |   |                                  |
| Print          |  | he Letter to a PDF for your printing ne                   | eeds and will save a copy to the |
| WinWord        | property record for<br>This will convert t | r later reference.<br>he Letter to a WinWord Document for | your printing needs.             |
| VVIIIVVOIC     |  |   |                                  |
| « Previou      | is 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.

| Property      | Letter    | :: Listing     | : #1P0001 - Copacabana               | 4                      |
|---------------|-----------|----------------|--------------------------------------|------------------------|
| Step 3 of 3 - | Letter Di | stribution     |                                      | View created letters » |
| Templates     | Modify    | The Letter     | Letter Distribution                  |                        |
| Distribution  | Method:   | Send as HT     | ML email 👻                           | 4                      |
|               |           |                |                                      |                        |
|               |           | his Letter ::- |                                      |                        |
| Email Sub     | ject: *   | Offer Notific  | ation Letter                         |                        |
| Email Mes     | sage :    | Letter will    | be directly put into the body of ema | ail.                   |
|               |           |                |                                      |                        |
|               |           |                |                                      |                        |
|               |           |                |                                      |                        |
|               |           |                |                                      |                        |
|               |           |                |                                      |                        |
|               |           |                |                                      | E                      |
|               |           |                |                                      |                        |
|               |           |                |                                      |                        |
| Reply From    | m         | John Smith     | ı (john@agentbox.com.au)             |                        |
| Assign Co     | ntact     |                |                                      | DIA .                  |
| Email Con     |           | The            |                                      |                        |
| Lindir Con    | nardalti  | Michael        | Johnson (Vendor)                     |                        |
|               |           |                |                                      |                        |
|               |           |                |                                      |                        |
|               |           |                |                                      |                        |
|               |           |                |                                      |                        |
| « Previo      | us Step   |                |                                      | Save & Proceed »       |

| Step 3 of 3 - I | Letter Distribution   |                          | View created letters »  |
|-----------------|-----------------------|--------------------------|---|
| Templates       | Modify The Letter     | Letter Distribution      |   |
| Distribution N  | Nethod: Send as an    | attachment via email 🔻   |   |
| -:: Option to   | Email this Letter ::- |                          |   |
| Email Subj      | ect: * Offer Notifi   | cation Letter            |   |
| Email Mess      |                       |                          | E 1 = ■<br>A • 1 2 •   2 3 HTML   2 0 2 #<br>  × <sub>1</sub> × <sup>2</sup>   Ω = 3 AA Δ6<br>E |
| Reply From      | : John Smit           | h (john@agentbox.com.au) | *   |
| Assign Con      |                       |                          | noa   |
| Email Cont      | act(s)?: Michae       | I Johnson (Vendor)       |   |

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?

| :: Listin  | ig : ID#1P | 0001 - 1     | Jones Stree | t, Copacabana     |           |            | 00         |
|------------|------------|--------------|-------------|-------------------|-----------|------------|------------|
| #          |            |              | 0 1         |                   | 5 1       | 5          | Full View  |
| General    | For Sale   | Features     | Open Homes  | Agents & Contacts | Resources | Commission |            |
| Status:    |            | Available    |             |                   |           | -          |            |
| For Sale/  | Rental:    | For Sale     | •           |                   |           |            |            |
| Type: *    |            | Residential  |             |                   |           | - ANA      |            |
| Category:  | *          | House        |             |                   |           | Copy This  | s Property |
| Investmen  | nt?:       |              |             |                   |           |            | eview Link |
| Sale Meth  | nod:       | Private Trea | ty 💌        |                   |           |            |            |
| Authority: |            | Exclusive    |             |                   |           |            |            |
| Property   | Name:      |              |             |                   |           |            |            |
| Level No.  | ¢          | 0            | nit No.:    | Street No.:       | 1         |            |            |
| Street Na  | me: *      | Jones        |             | Street Type: *    | Street    | •          |            |
| Suburb: *  |            | COPACABA     | NA (2251)   | State: *          | NSW       |            |            |
| nta, kaa   | 7:         | Save         |             | 19 - M            |           | 2          | -          |

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 : #1P0    | 001 - 1 Jones  | Street, Copacaba               | ana       |             | • •        |
|----------------------|--|--------------------------------|-----------|-------------|------------|
| # @ • •              | P 2 0  |                                |           | 120         | Full View  |
| General For Sale     | Features OFI   | Agents & Contacts              | Resources | Commission  |            |
| Role:<br>Agent:      | Selling Agent<br>Assign your agents  | Atta                           |           | (uncheck to | de-select) |
| Selected Agents:     | John Smith (List   |                                |           |             |            |
| Appear on Site:      | John Smith (List<br>John Smith (Sel  |                                |           |             | E          |
| :: Assign related Co | ntacts ::  |                                |           |             |            |
| Role:<br>Contact:    | Buyer  | Add                            |           | (uncheck to | de-select) |
| Selected Contacts:   | <ul> <li>Michael Johnson</li> <li>Julia Burn (Buye</li> <li>David Kim (Vend</li> <li>Mary May (Buye</li> </ul> | r Solicitor)<br>lor Solicitor) |           |             |            |
| Save                 |  |                                |           |             |            |

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.

| ep 1 of 3 - S                            | Select Ten | nplate                        |                                    |             | View created letters |
|--|------------|-------------------------------|------------------------------------|-------------|----------------------|
| emplates                                 | Modify Th  | ne Letter                     | Letter Distribution                |             |                      |
| elect a Tem                              | plate;     | Purchaser :                   | Sales Advice                       |             | 1                    |
| :: Template<br>Send From:<br>Purchaser S | E          | Select S                      | Staff Member (By default will be y | rourself) 💌 | 1                    |
| Property                                 | Details    | 9× 4 C<br>Pho<br>Fax          | ail: office@agentbox.com.au        | 15          | E                    |
|  |            |                               |                                    | _           |                      |
| Property Ad<br>Contract Pri              |            | {\$prop_loc}<br>{\$sold_price | a)                                 |             | Deposit Held:        |
| *  |            | W.                            |                                    |             | , <del>7</del>       |
|  |            |                               |                                    |             | Save & Proceed »     |

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 Lette       | r :: Listing         | : #1P0001 - Copaca   | bana | -                      |
|----------------------|----------------------|--|------|------------------------|
| Step 2 of 3 - Modify | The Letter           |  |      | View created letters » |
| Templates Modif      | y The Letter         | Letter Distribution  |      |                        |
|                      | 🗐 📄 Forma            | t 🔻 Font size 👻 🗄  |      | <b>∢</b> ⊨             |
| ADENTE               | 4 Co<br>Phor<br>Fax: | Agency<br>rnwallis Street, Eveleigh, NSW<br>e: 02 9209 4174<br>02 9310 7232<br>I: office@agentbox.com.au<br>11 222 112 142 | 2015 | * III                  |
| Property Details     | 5                    |  |      |                        |
| Property Address:    | 1 Jones Stre         | et, Copacabana, NSW 2251   |      |                        |
| Contract Price:      | \$1,250,000          |  | D    | eposit Held:           |
| Sales Details        |                      |  |      |                        |
|                      |                      |  |      | ÷                      |
| 9                    | t<br>III             | 1  | 4    |                        |
| « Previous Step      |                      |  | 3    | Save & Proceed »       |
|                      |                      |  |      |                        |

- 7. Click Save & Proceed
- 8. You can now click Print, to generate as a PDF download.

| Property Let                      | ter :: Listing                           | : #1P0001 - Cop   | acabana                 | 2                      |
|-----------------------------------|--|---|-------------------------|------------------------|
| Step 3 of 3 - Lett                | er Distribution                          |   |                         | View created letters » |
| Templates Mo                      | odify The Letter                         | Letter Distribution   |                         |                        |
| Distribution Meth                 | hod: Print as PDF                        | · · · · · ·   |                         |                        |
| F: Print this Let                 | te Opening 132276                        | 5322.pdf  |                         |                        |
| Print<br>WinWord<br>« Previous St | from: h<br>What should<br>Open<br>Save l | 5322.pdf<br>a: Adobe Acrobat Docume<br>tp://admin.training.yourag<br>Firefox do with this file?<br>with Adobe Reader (def | encîes.com,au<br>fault) | Cancel                 |
|                                   |  |   |                         |                        |

| _ | 297.pdf - Adobe Rei<br>View Window I | Help     |                         |   |      | _    |        |           |             |          |         |             |      |       |        |
|---|--------------------------------------|----------|-------------------------|---|------|------|--------|-----------|-------------|----------|---------|-------------|------|-------|--------|
| - |                                      |          | ~ ~                     |   | 10   |      | T 1    |           | 1           | - 1      | -       |             |      |       | 1      |
| 4 |                                      |          |                         | 1 / 1   |      | •    | 103% * |           | P           | 9        | *       |             |      | Tools | Comr   |
|   | AGENTE                               | ox"      | Phone: 03<br>Fax: 03    | cy<br>s Street, Evel<br>2 9209 4174<br>2 9310 7232<br>fice@agentbo<br>1 222 112 142 |      | 2015 |        |           |             |          |         | Purch       | aser |       | Advice |
|   | Property Detail:                     | s        |                         |   |      |      |        |           |             |          |         |             |      |       |        |
|   | Property Address:                    | 1 Jones  | Street, Copa            | cabana, NSW   | 2251 | _    |        |           |             |          |         |             |      |       |        |
|   | Contract Price:                      | \$1,250. | 000                     |   |      |      |        | Deposit H | eld:        | \$125.00 | 0       |             |      |       |        |
|   | Sales Details                        |          | -                       | -   | -    |      | -      |           | -           |          |         | -           | -    | -     |        |
|   | Agency:                              | Your Ag  | gency                   |   |      |      |        | Agent:    |             | John Sm  | ith     |             |      |       |        |
| Ľ | Vendor Details<br>Vendor Name:       | -        | Mr Michae<br>PO Box 45  | AL -  | _    |      |        | _         | _           | _        |         | _           |      | _     | _      |
|   | Vendor Address:                      | _        | Sydney NS               |   | -    |      |        |           | _           |          |         |             |      |       |        |
|   | Vendor Phone:                        |          | 02 9564 2               | 533   |      |      |        | Vendor Er | nai:        | _        | mick@g  | gmail.com   |      |       |        |
| Ŀ | Vendor Solicitor Nar                 | ne:      | David Kim               |   |      |      |        |           |             |          |         |             |      |       | -      |
|   | Vendor Solicitor Add                 | dress:   | 45 Kent St<br>Sydney NS |   |      |      |        |           |             |          |         |             |      |       |        |
|   | Vendor Solicitor Cor                 | mpany:   | Kim & Tun               | nér Lawyèrs   | 1.1  |      |        | Vendor So | licitor Pho | one:     | 02 9100 | 1234        |      |       | 1      |
|   | Vendor Solicitor Fax                 | 48       |                         |   |      |      |        | Vendor So | licitor Em  | ail:     | dk@big  | pond.net.au |      |       | _      |
|   | Purchaser Deta                       | ils      |                         |   | -    |      | -      | _         | -           | -        |         | -           | -    | -     |        |
|   | Purchaser Name:                      | -        | Miss Mary               | May   |      |      |        |           |             |          |         |             |      |       |        |
|   | Purchaser Address:                   |          | 1 Miles Ro<br>Camperdo  | ad<br>wn NSW 2050   | 0    |      |        |           |             |          |         |             |      |       |        |
|   |                                      |          |                         |   |      |      |        |           |             |          |         |             |      |       |        |

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

| Property Letter         | :: Listing     | : #1P0001 - Copac  | abana 🥝   |
|-------------------------|----------------|--|---|
| Step 3 of 3 - Letter Di | stribution     |  | View created letters »  |
| Templates Modify        | The Letter     | Letter Distribution  |   |
| Distribution Method:    | Send as an     | attachment via email 👻   | A CONTRACTOR OF A CONTRACTOR |
| T:: Option to Email th  | nis Letter ::- |  |   |
| Email Subject: *        | Purchaser      | Sales Advice   |   |
| Email Message :         | X the Ca       |  | ·ⅢⅢ■<br>□▲·型·Ⅰ▲ 《 **** 图 ◎ Ⅲ 律<br>□■□   — ×. ×* Ω ◎ 希 编   |
|                         | Please fi      | nd the attached letter.  | E   |
| Reply From:             | John Smith     | i (john@agentbox.com.au)   | · · · · · · · · · · · · · · · · · · ·   |
| Assign Contact:         | -              |  | Add   |
| Email Contact(s)?:      | Michael        | rn (Buyer Solicitor)<br>Johnson (Vendor)<br>m (Vendor Solicitor)<br>ay (Buyer) |   |
|                         |                |  |   |

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?

| :: Listing : ID#1P0001 - 1 Jones Street, Copacabana |          |              |            |                 |               |            |              |  |  |
|---|----------|--------------|------------|-----------------|---------------|------------|--------------|--|--|
|   |          |              | 021        |                 | <b>デミーや</b>   | -          | Full View    |  |  |
| General   | For Sale | Features     | Open Homes | Agents & Contai | cts Resources | Commission |              |  |  |
| Status:   |          | Available    |            |                 |               | 100        | -            |  |  |
| For Sale/I  | Rental:  | For Sale     | •          |                 |               |            |              |  |  |
| Type: *   |          | Residential  | •          |                 |               | - ANA      |              |  |  |
| Category:   | *        | House        |            |                 |               | Conv This  | Property     |  |  |
| Investmen   | nt?:     |              |            |                 |               |            | eview Link - |  |  |
| Sale Meth   | iod:     | Private Trea | ty 💌       |                 |               |            |              |  |  |
| Authority:  |          | Exclusive    |            |                 |               |            |              |  |  |
| Property I  | Name:    |              |            |                 |               |            |              |  |  |
| Level No.   |          | 0            | nit No.:   | Street No.:     | 1             |            |              |  |  |
| Street Na   | me: *    | Jones        |            | Street Type: *  | Street        |            | 1.0          |  |  |
| Suburb: *   |          | COPACABA     | NA (2251)  | State: *        | NSW           |            |              |  |  |
| uta, Alaa.  |          | Save         |            | 9. H            |               |            |              |  |  |

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   | 9                    |
|----------------------|---|----------------------|
| Step 1 of 3 - Selec  | t 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          | <complex-block><complex-block><complex-block><complex-block><complex-block></complex-block></complex-block></complex-block></complex-block></complex-block> |                      |

### 5. Click on the required Template

| Create Digital       | Print              | Contrained -                     |                               |                                     | 8                    |
|----------------------|--------------------|----------------------------------|-------------------------------|-------------------------------------|----------------------|
| Step 1 of 3 - Selec  | t a template       |                                  |                               |                                     | View Previous Prints |
| Select Template      | Edit Details       | Print or Send                    |                               |                                     |                      |
| Please Note : This I | Digital Print Area | a is for printing purposes       | only. It is not designed to b | e used for Bulk E-Mail Newsletters. |                      |
| Select Type          | Residential I      | Brochures                        |                               | T                                   |                      |
|                      |                    |                                  |                               |                                     |                      |
|                      |                    | Address<br>Brochure 1 Image desc |                               |                                     |                      |
| Let _                | -                  |                                  | 18                            | Save & Proceed »                    |                      |
|                      |                    |                                  |                               |                                     |                      |

### 6. Click on Save & Proceed

| Create Digital Print                  |                    | 8                      |
|---------------------------------------|--------------------|------------------------|
| Step 2 of 3 - Edit your print         |                    | View Previous Prints   |
| Select Template Edit Det              | ails Print or Send |                        |
| KORBALE<br>FORBALE<br>« Previous Step |                    | <image/> <text></text> |

- 7. Click Preview to view a preview of the final brochure
- 8. When you are satisfied with the final brochure click Save & Proceed

| Create Digital                          | Print  | 8                    |
|---|--|----------------------|
| Step 3 of 3 - Send                      | / Print your template  | View Previous Prints |
| Select Template                         | Edit Details Print or Send                                     |                      |
| Add Recipient:                          | Print PDF Please enter Name Add                                | <u>.</u>             |
| Delivery To:                            |  | E                    |
| Reply From:<br>Subject: *<br>Message: * | John Smith (john@agentbox.com.au)<br>B / 및   新 書 書 ■ Paragraph |                      |

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.

| Create Digital            | l Print   | 9                    |
|---------------------------|---|----------------------|
| Step 3 of 3 - Send        | d / Print your template                               | View Previous Prints |
| Select Template           | Edit Details Print or Send                            |                      |
|                           |   |                      |
|                           |   |                      |
| Reply From:<br>Subject: * | John Smith (john@agentbox.com.au)                     |                      |
| Message: *                | B Z 및 특 등 특 ≣ Paragraph → 등 등 ₪                       |                      |
|                           | ※ 🖬 🏝 🎰   🚉 😅 🎔 +   = □ =   ▲ + 型 +   星 🎺 🚥   団 🗵 葦 印 |                      |
|                           |   |                      |
|                           |   |                      |
|                           |   |                      |
|                           |   | E                    |
|                           |   |                      |
|                           |   |                      |
|                           |   |                      |
|                           | Print PDF   |                      |
| « Previous Ste            | Save Send Now   | Ļ                    |

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

| eate Digital Print  |         |                 |                    |
|---|---------|-----------------|--------------------|
| ep 2 of 3 - Edit your print   |         | <b>1</b> -0     | iew Previous Print |
| ect Template Edit Details Print or Send   |         |                 |                    |
| Luxury Balinese Inspired Residence  | Туре    | House           |                    |
| Don't miss out on this one! Relax in your open plan living area,opening onto an   |         | Contact Agent   |                    |
| outdoor entertaining area overlooking the infinity pool and breathtaking ocean<br>views.  | Water   | \$250 Quarterly |                    |
| Three large bedreams, all contain an avites and built in words to a the words   | Council | \$205 Quarterly |                    |
| Three large bedrooms, all contain en suites and built in wardrobes, the master<br>features 270 degrees of ocean views. With automatic block out blinds for<br>ultimate privacy. | WWW ID  | 1P0001          |                    |
|   |         |                 |                    |
| 1   |         |                 | •                  |
| « Previous Step   |         | Preview         | Save & Proceed     |
|   |         |                 |                    |

2. Edit Heading and Description

### 3. Click on Save

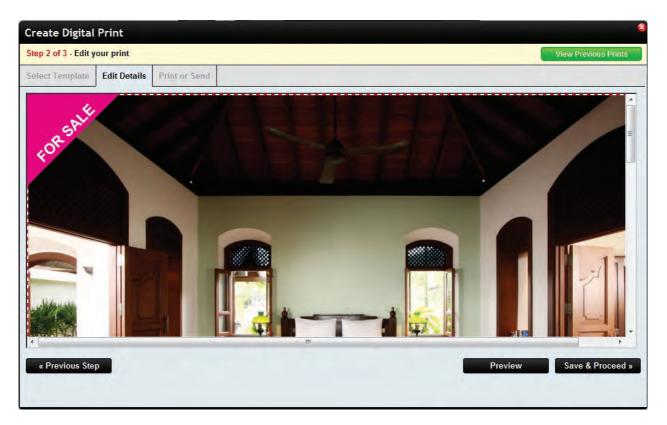
| ::Edit this Se | ection: Brochure 1 Image desc   | 8 |
|----------------|---|---|
| Headline:      | Luxury Balinese Inspired Residence  | 1 |
| Description:   | Don't miss out on this one! Relax in your open plan living area, opening onto an outdoor<br>entertaining area overlooking the infinity pool and breathtaking ocean views.<br>Three large bedrooms, all contain en suites and built in wardrobes, the master features<br>270 degrees of ocean views. With automatic block out blinds for ultimate privacy. |   |
| Suburb:        | Characters typed in so far: 338 (max = 1500 characters) Copacabana Address: 1 Jones Street Save   |   |

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

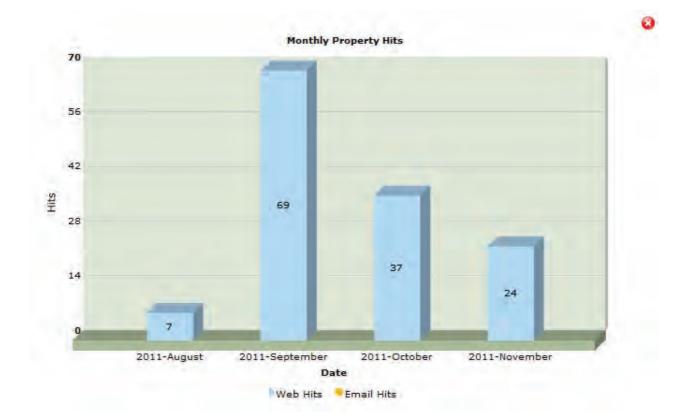


## **Property Hits**

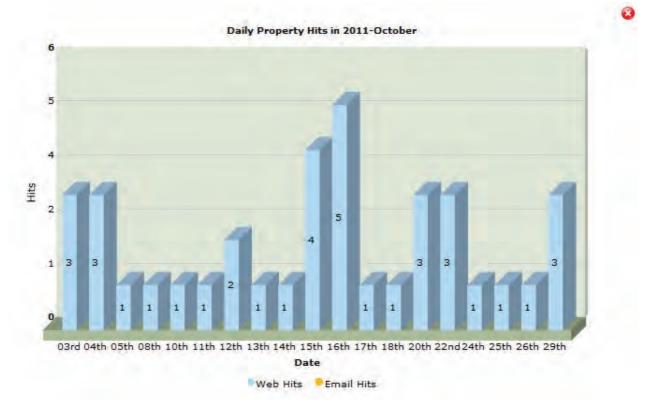
How do I view website hits for a property? \*Note: this refers to web hits from your website only not from the portals. 1. Search for your Property and open the Property Card

| :: Listing : ID#1 | 1P0001 - 1 Jones Stree | et, Copacabana    |           |            | 00         |
|-------------------|------------------------|-------------------|-----------|------------|------------|
| # @ <b>   </b>    |                        |                   | - III     | -          | Full View  |
| General For Sale  | e Features Open Homes  | Agents & Contacts | Resources | Commission |            |
| Status:           | Available              |                   |           | -          | 17 -       |
| For Sale/Rental:  | For Sale               |                   |           |            |            |
| Type: *           | Residential            |                   |           | - ANA      |            |
| Category: *       | House                  |                   |           | Cons This  | s Property |
| Investment?:      |                        |                   |           |            | eview Link |
| Sale Method:      | Private Treaty         |                   |           | Yenderter  | STICT ENIN |
| Authority:        | Exclusive              |                   |           |            |            |
| Property Name:    |                        |                   |           |            |            |
| Level No.:        | Unit No.:              | Street No.:       | 1         |            |            |
| Street Name: *    | Jones                  | Street Type: *    | Street    | •          | 1.00       |
| Suburb: *         | COPACABANA (2251)      | State: *          | NSW       |            |            |
| 111.d. A.d        | · · · · · · · · ·      | 9 m               |           |            | -          |
|                   | 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.

| 0005 - 33-35 Main St       | reet, Sydney  |  |   |
|----------------------------|---|--|---|
| P 2 0 1                    |   | 1 2 1  | Full View   |
| Features Open Homes        | Agents & Contacts   | Resources  |   |
| Offline                    |   | -  |   |
| For Lease 🔹                |   |  | Copy This Property  |
| Holiday                    |   |  |   |
| House                      |   |  | E   |
|                            |   |  |   |
| Unit No.:                  | Street No.:   | 33-35  |   |
| Main                       | Street Type: *  | Street   | •   |
| SYDNEY (2000)              | State: *  | NSW  |   |
| Tick to hide the address   | on your web site.   |  |   |
| Tick to edit address for y | our web display forma   | at.  |   |
| 33-35 Main Street          |   |  |   |
|                            | • • • • •   |  |   |
| Save                       |   |  |   |
|                            | Features Open Homes   Offline •   For Lease •   Holiday •   House •   Unit No.: •   Main •   SYDNEY (2000) •   Tick to hide the address for y   33-35 Main Street | Offline         For Lease         Holiday         House         House         Unit No.:         Street No.:         Main         Street Type: *         SYDNEY (2000)         State: *         Tick to hide the address on your web site.         Tick to edit address for your web display formations         33-35 Main Street | Features Open Homes Agents & Contacts Resources   Offline •   For Lease •   Holiday •   House •   Unit No.: Street No.:   33-35   Main Street Type:*   SyDNEY (2000) State:*   NSW   Tick to hide the address on your web site.   Tick to edit address for your web display format. |

3. Select the portal from the Portal drop down menu to view the feed.

| 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                                      |
| 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 their 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#1F | 20005 - 33-35 Main Str      | eet, Sydne     | у         |     |                  |
|--------------------|-----------------------------|----------------|-----------|-----|------------------|
|                    | P 2 0 E                     |                |           | 2 5 | Full View        |
| General For Lease  | Features OFI Agents         | & Contacts     | Resources |     |                  |
| Status:            | Offline                     |                |           | -   | *                |
| For Sale/Rental:   | For Lease                   |                |           | Co  | py This Property |
| Type: *            | Holiday                     |                |           |     | ŧ                |
| Category: *        | House                       |                |           |     |                  |
| Property Name:     |                             |                |           |     |                  |
| Level No.:         | Unit No.:                   | Street No.:    | 33-3      | 5   |                  |
| Street Name: *     | Main                        | Street Type: * | Stre      | et  |                  |
| Suburb: *          | SYDNEY (2000)               | State: *       | NSV       | N   |                  |
| Hide Address?:     | Tick to hide the address o  | n your web sit | e,        |     |                  |
|                    | Tick to edit address for yo | ur web display | / format. |     |                  |
| A .I.I             | DO DO 14 1 D                |                |           |     |                  |
|                    | Save                        |                |           |     |                  |
|                    |                             |                |           |     |                  |

## How do I track Marketing Funds and Expenditure?

The marketing funds system in Agentbox allows you to

1. Log approved funds

2. <u>Log expenses against a property</u> 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. <u>Mark a full or part payment against the approved funds</u>

### 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#1 | P0005 - 33-35 Main S       | treet, Sydn    | ey         |     | 08                 |
|-------------------|----------------------------|----------------|------------|-----|--------------------|
|                   | P & & Z                    |                |            | 10  | Full View          |
| General For Leas  | e Features OFI Agent       | s & Contacts   | Resources  |     |                    |
| Status:           | Offline                    |                |            |     | -                  |
| For Sale/Rental:  | For Lease                  |                |            |     | Copy This Property |
| Type: *           | Holiday                    |                |            |     | E                  |
| Category: *       | House                      |                |            |     |                    |
| Property Name:    |                            |                |            |     |                    |
| Level No.:        | Unit No.:                  | Street No.:    | 33-3       | 35  |                    |
| Street Name: *    | Main                       | Street Type:   | Str        | eet | -                  |
| Suburb: *         | SYDNEY (2000)              | State: *       | NS         | W   | -                  |
| Hide Address?:    | Tick to hide the address   | on your web s  | ite.       |     |                    |
|                   | Tick to edit address for y | our web displa | ay format. |     |                    |
| A .I.I            | Inn ne station a           |                |            |     | 1 *                |
|                   | Save                       |                |            |     |                    |

3. In the first tab - Marketing Funds click the Add new funding button.

| :: Marketing F  | unds : #1P0005 - 3   | 33-35 Main Street, Sydney |                 |
|-----------------|----------------------|---------------------------|-----------------|
| Marketing Funds | Current Expenditures |                           |                 |
|                 |                      |                           | Add New Funding |
|                 |                      |                           |                 |
|                 |                      |                           |                 |
|                 |                      |                           |                 |
|                 |                      |                           |                 |
|                 |                      |                           |                 |
|                 |                      |                           |                 |
|                 |                      |                           |                 |
|                 |                      |                           |                 |
| -               |                      |                           |                 |

o Enter the Date, approved amount and any comments and click Save

| Add Fund                              |                     |
|---------------------------------------|---------------------|
| Approved Date:*<br>Approved Amount \$ | 13 12 2011 <b>5</b> |
| Comment:                              | save Cancel         |
|                                       |                     |

4. You can now Edit or Delete this fund in the Funds approved column of the Marketing Funds tab. Or <u>add</u> <u>a payment</u> if the funds have been approved.

| :: Marketin   | g Funds : #1P0005 -     | 33-35 Main Street, Sydney |                 |
|---------------|-------------------------|---------------------------|-----------------|
| Marketing Fur | ds 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          |
| Drint         |                         |                           |                 |
| Print         | 10101.                  | .20100000                 | 40.00           |
|               |                         |                           |                 |
|               |                         |                           |                 |
|               |                         |                           |                 |
|               |                         |                           |                 |
|               |                         |                           |                 |
|               |                         |                           |                 |
|               |                         |                           |                 |

### **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#1F | P0005 - 33-35 Main Street, Sydney  | . 3       |
|--------------------|--|-----------|
|                    |  | Full View |
| General For Lease  | e Features OFI Agents & Contacts Resources   |           |
| Status:            | Offline  | *         |
| For Sale/Rental:   | For Lease Copy This P  | ropeny    |
| Type: *            | Holiday  | E         |
| 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.  |           |
| A .1.1             | he of the second s |           |
|                    | Save   |           |

### 3. Click on the Current Expenditures Tab

| :: Current Exp  | enditures : #1P00    | 5 - 33-35 Main Street, Sydney |
|-----------------|----------------------|-------------------------------|
| Marketing Funds | Current Expenditures |                               |
|                 |                      | Add New Expense               |
|                 |                      |                               |
|                 |                      |                               |
|                 |                      |                               |
|                 |                      |                               |
|                 |                      |                               |
|                 |                      |                               |
|                 |                      |                               |
| -               |                      |                               |

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 Exp   | enditures : #1P0005 - 33-35 Main Street, Sydney  |               | 8    |
|--|--|---------------|------|
| Marketing Funds  | Current Expenditures   |               | 3    |
| Start Date: *<br>Supplier: *<br>Purchase Item: *<br>Oty.: *<br>Price \$: * | 13     12     2011       Sam Jones Sj Photograp       8 Photographs (\$880.00)       1       880   Paid? | View Expenses | TH H |
| Paid By: *   | Office Add<br>Office \$440<br>(VENDOR) Michael Johnson \$440   |               | ***  |

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 <u>payment</u> 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.

| larketii        | ng Funds Curre                     | ent Expenditures     |            |                |                    |             |        |  |
|-----------------|------------------------------------|----------------------|------------|----------------|--------------------|-------------|--------|--|
| Date            | Supplier Itome Cost                | Office<br>Paid       | Agent Paid | Vendor<br>Paid |                    |             |        |  |
| 13<br>Dec<br>11 | Sam Jones Sj<br>Photography        | (1) 8<br>Photographs | \$880.00   | \$440.00       | \$0.00             | \$440.00    | Delete |  |
| 13<br>Dec<br>11 | Thomas Train<br>Signboards R<br>Us | (1) Signboard        | \$500.00   | \$0.00         | \$0.00             | \$500.00    | Delete |  |
| 13<br>Dec<br>11 | Apex Printers                      | (1) Brochures        | \$560.00   | \$0.00         | \$0.00             | \$560.00    | Delete |  |
|                 |                                    | Total:               | \$1,940.00 | \$440.00       | \$0.00             | \$1,500.00  | 8      |  |
|                 |                                    |                      |            |                | Funds<br>Approved: | \$3,000.00  |        |  |
|                 |                                    |                      |            |                | Funds<br>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.

| arketing Fu | nds Current Expenditure | s                      |                                   |  |
|-------------|-------------------------|------------------------|-----------------------------------|--|
| )ate        | Comments                | Funds Approved         | Add New Funding<br>Funds Received |  |
| 3 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:*<br>Amount Paid \$:* | 13 12 2011 <b>1</b> |  |
| Contraction of A rows           | * Direct Debit 💌    |  |
| -                               | Full Payment        |  |
| Comment:                        | Save Cancel         |  |
|                                 |                     |  |

- 5. To add another payment repeat step 4.
- 6. Once added you can edit or delete a payment or print a report.

| Marketing Funds |    | unds : #1P0005 - 33-3<br>Current Expenditures |                        |                        |
|-----------------|----|---|------------------------|------------------------|
|                 | -  |   |                        | Add New Funding        |
| Date            | Co | omments                                       | Funds Approved         | Funds Received         |
| 13 Dec 11       |    |   | \$3,000.00 Edit Delete | Add Payment            |
| 13 Dec 11       | Pa | id By Direct Debit Full Payment               |                        | \$3.000.00 Eart Delete |
|                 | То | tal:  | \$3,000.00             | \$3,000.00             |
| Deint           | To | tal:  | \$3,000.00             | \$3,000.00             |
| Print           |    |   |                        |                        |
|                 |    |   |                        |                        |
|                 |    |   |                        |                        |
|                 |    |   |                        |                        |
|                 |    |   |                        |                        |

### **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#1P | 20005 - 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.                |
| A .1.1             |  |
|                    | Save   |

### 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.

|           |    | Current Expenditures | 35 Main Street, Sydney |                 |
|-----------|----|----------------------|------------------------|-----------------|
|           | -  |                      |                        | Add New Funding |
| Date      | Co | omments              | Funds Approved         | Funds Received  |
| 13 Dec 11 |    |                      | \$3,000.00 Edit Delete | Add Payment     |
|           | To | ital:                | \$3,000.00             | \$0.00          |
|           | -  |                      | 1                      | 1               |
|           |    |                      |                        |                 |
| Print     |    |                      |                        |                 |

**Notes History** 

# How do I view all notes logged against a property?

1. Search for your Property and open the Property Card

| Listing - ID#1P0001              | :: Listing : ID#1P0001 - 1 Jones Street, Copacabana                      |
|----------------------------------|--|
| < Back to Properties             | 👫 @ 🖩 🖻 🗭 🎓 🐨 🕼 🛗 🖹 🚘 🦹 📶 ج 💩 🛛 Full View                                |
| > Notes History                  | General For Sale Features OFI Agents & Contacts Resources Commission     |
| > Recent Enquiries               | Status: Available Copy This Property                                     |
| > Property History               | For Sale/Lease: For Sale   |
| > Inspections (4) & Feedback (3) | Type: * Residential  |
| > Activity Schedules             | Category: * House  |
| > Offers Made(1)                 | Investment?:   |
| > Contracts Requested(1)         | Sale Method: Private Treaty  |
| > Property Modifications Log     | Authority: Exclusive   |
| > Links to Portals               | Level No.: Unit No.: Street No.: 1                                       |
|                                  | Street Name: * Jones Street Type: Street                                 |
| > Help Text                      | 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   |
|                                  | Juit   |

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.

| Listing - ID#1P0001   |   |
|---|---|
| < Back to Properties  |   |
| ✓ Notes History   |   |
| <ul> <li>20/10/11 - Vendor is going on holiday.<br/>Contact on return for a property update.</li> <li>Holidaying in Vanuatu with wife. Won holiday<br/>through a radio competition. Returning 30.10.11</li> <li>- created by: John Smith More Detail »</li> </ul> | * |
| > Recent Enquiries  |   |
|   | - |
| > Property History  | _ |
| > Buyer Feedback & Vendor Report(1)   |   |
| > Offers Made(1)  |   |
| > Contracts Requested(1)  |   |
| > Property Modifications Log  |   |
| > Links to Portals  |   |
| > Help Text   |   |

# **Property History**

How do I view the history of my property?

1. Search for your Property and open the Property Card

| Listing - ID#1P0001              | :: Listing : ID#1P0001 - 1 Jones Street, Copacabana                  |
|----------------------------------|--|
| < Back to Properties             | 👬 @ 🖬 🖻 🖗 🎓 🐨 🕼 🛗 🖹 🚘 🦜 📶 ج 🗟 🛛 Full Viev                            |
| > Notes History                  | General For Sale Features OFI Agents & Contacts Resources Commission |
| > Recent Enquiries               | Status: Available Copy This Property                                 |
| > Property History               | For Sale/Lease: For Sale   |
| > Inspections (4) & Feedback (3) | Type: * Residential  |
| > Activity Schedules             | Category: * House  |
| > Offers Made(1)                 | Investment?:   |
| > Contracts Requested(1)         | Authority: Exclusive   |
| > Property Modifications Log     | Authority: Exclusive  Property Name:                                 |
| > Links to Portals               | Level No.: Unit No.: Street No.: 1                                   |
| > Help Text                      | Street Name: * Jones Street Type: Street                             |
| - Trop Text                      | 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 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.

| 合 Listing - ID#     | 1P0001                |
|---------------------|-----------------------|
| < Back to Propertie | s                     |
| > Notes History     |                       |
| > Recent Enquiries  | i.                    |
| ✓ 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)    | a service contraction |
| > Contracts Reque   | sted(1)               |
| > Property Modifica | ations Log            |
| > Links to Portals  |                       |
| > Help Text         |                       |

## **Inspection Feedback**

How do I Add Feedback after a Property Inspection into Agentbox?

1. <u>Search for your Property</u> and open the <u>Property Card</u>

\*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            | :: Listing : ID#1P0001 - 1 Jones Street, Copacabana                  |
|--------------------------------|--|
| < Back to Properties           | 👬 @ 🖩 🖻 🖗 🎓 🚱 🔓 🛗 🖹 🚘 🦜 📶 ج 💩 🛛 Full View                            |
| > Notes History                | General For Sale Features OFI Agents & Contacts Resources Commission |
| > Recent Enquiries             | Status: Available  |
| > Property History             | For Sale/Lease: For Sale   |
| Inspections (4) & Feedback (3) | Type: * Residential  |
| > Activity Schedules           | Category: * House  |
| > Offers Made(1)               | Investment?:   |
| > Contracts Requested(1)       | Sale Method: Private Treaty  Authority: Exclusive                    |
| > Property Modifications Log   | Authority: Exclusive  Property Name:                                 |
| > Links to Portals             | Level No.: Unit No.: Street No.: 1                                   |
| > Help Text                    | Street Name: * Jones Street Type: Street                             |
| - neip lext                    | Suburb: * COPACABANA (2251) State: * NSW                             |
|                                | Hide Address?:   |
|                                | 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

| 合 Listi            | ng - ID#1P0001               |  |  |  |  |
|--------------------|------------------------------|--|--|--|--|
| < Back to          | Properties                   |  |  |  |  |
| > Notes H          | > Notes History              |  |  |  |  |
| > Recent Enquiries |                              |  |  |  |  |
| > Property         | > Property History           |  |  |  |  |
| Y Inspecti         | ons (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          |  |  |  |  |
| 05/11/2011         | 10:00 AM - 10:30 AM Feedback |  |  |  |  |
| All Vie            | wers Feedback Report         |  |  |  |  |
| > Activity         | Schedules                    |  |  |  |  |
| > Offers N         | lade(1)                      |  |  |  |  |
| > Contrac          | ts Requested                 |  |  |  |  |
| > Property         | y Modifications Log          |  |  |  |  |
| > Links to         | Portals                      |  |  |  |  |
| > Help Te          | xt                           |  |  |  |  |

- 3. Click on the green 'Feedback' button next to the property inspection time.
- 4. The 'Buyer Feedback' window will open in the right panel.

| Listing - ID#1P0001   | :: Listing : ID#1  | P0001 - 1 Jones Street, Copacabana 🛛 😣 😣   | Inspection Feedback   |
|---|--|--|---|
| < Back to Properties  |  | 😨 🏠 🕜 📝 🛗 🖹 🚘 🦄 🚽 👌 🧴 🛛 Full View  | Add Feedback (1) Other Feedback   |
| ✓ Notes History   | General For Sale   | Features OFI Agents & Contacts Resources Commission  |   |
| <ul> <li>20/10/11 - Vendor is going on holiday.<br/>Contact on return for a property update. :<br/>Holidaying in Vanuatu with wife. Won holiday<br/>through a radio competition. Returning 30.10.11<br/>- created by: Jane Smith More Detail »</li> </ul> | Status:<br>For Sale/Lease:<br>Type: *<br>Category: *<br>Investment?:<br>Sale Method: | Available     •     Copy this Property       For Sale     •       House     •       Physics Treaty     • | Jones Street, Copacabana     07/1220111000am - 10.30am     Contact: Enter Name. Phone or Email     Price Feedback \$:     Contract TakenClassification▼     Comments: |
| > Recent Enquiries  | Authority:<br>Property Name:   | Exclusive x  |   |
| > Property History  | Level No.:   | Unit No.: Street No.: 1  | Save & Add Another Save & View Contact  |
| > Inspections (4) & Feedback (3)  | Street Name: * Suburb: *   | Jones Street Type: Street   COPACABANA (2251) State: * NSW   | 10.000  |
| > Activity Schedules  | Hide Address?:   | Tick to hide the address on your web site.   |   |
| > Offers Made(1)  |  | Tick to edit address for your web display format.  |   |
| > Contracts Requested   | Address Formati  | In territy (Percent  |   |
| > Property Modifications Log  |  | Save   |   |
| > Links to Portals  |  |  |   |
| > Help Text   |  |  |   |

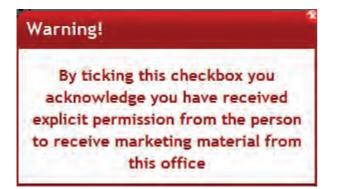
5. Search for the contact and select their name from the drop down.

| Inspection F                             | eedback 🧧                |
|--|--------------------------|
| Add Feedback                             | (1) Other Feedback       |
| 1 Jones Street, Co<br>07/12/2011 10:00am |                          |
| Contact: Ma                              | ry May                   |
| Price Feedback Contract Take Comments:   | enClassification         |
| Save & Add And                           | ther Save & View Contact |
|  |                          |

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 enewsletters and property alerts.

| Add Feedba                       | ck (1) Other Feedback            |
|----------------------------------|----------------------------------|
| 1 Jones Stree<br>07/12/2011 10:0 | et, Copacabana<br>10am - 10:30am |
| First Name:                      | Kevin                            |
| Last Name:                       | Munroe                           |
| Email:                           | kevin@bigpond.com                |
| Mobile No.:                      | 0412566986                       |
| Home No.:                        | 1                                |
| Work No.:                        |                                  |
| Suburb:                          |                                  |
| Subscribe                        | 17                               |
| Price Feedb                      | ack \$:                          |
| Contract                         | TakenClassification              |
| Comments:                        |                                  |
| -                                |                                  |
|                                  |                                  |
|                                  |                                  |

\*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.



7. Enter the feedback, interest level (hot, warm, cold), price feedback and whether or not they took a copy of the contract.

| Add Feedba                       | ck (1) Other Feedback                   |
|----------------------------------|---|
| 1 Jones Stree<br>07/12/2011 10:0 | et, Copacabana<br>I0am - 10:30am        |
| First Name:                      | Kevin                                   |
| Last Name:                       | Munroe                                  |
| Email:                           | kevin@bigpond.com                       |
| Mobile No.:                      | 0412566986                              |
| Home No.:                        |   |
| Work No.:                        |   |
| Suburb:                          |   |
| Subscribe                        | 17                                      |
| Price Feedb                      | ack \$: 1100000                         |
| Contract                         | TakenClassification                     |
| Comments:                        |   |
| Loved the hou                    | use, however was out of his price range |

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).

| 合 Listii   | ng - ID#1P0001           | :: Listing : ID#1P0001 - 1 Jones Street, Copacabana  | 0      |
|------------|--------------------------|--|--------|
| < Close    |                          |  | I View |
| > Notes H  | istory                   | General For Sale Features QFI Agents & Contacts Resources Commission   |        |
| > Recent   | Enquiries                | Status: Available Copy This Property   |        |
| > Property | y History                | For Sale/Lease: For Sale   |        |
| ≺ Inspecti | ons (4) & Feedback (3)   | Type: * Residential  |        |
| Date       | Period Add By Appoin     |  |        |
| 07/12/2011 | 10:00 AM - 10:30 AM      | Sale Method: Private Treaty  |        |
| 10/11/2011 | 09:00 AM - 10:00 AM      | e intere roomy interesting in the second sec |        |
| 07/11/2011 | 10:00 AM - 10:30 AM      | Property Name:   |        |
| 05/11/2011 | 10:00 AM - 10:30 AM Feed |  | н      |
| All Vie    | wers Feedback Re         | Address Format: 1 Jones Street   |        |
| > Activity | Schedules                | Google Map: Re-Position Marker Hide Street View Hide "What's around"   |        |
| > Offers N | Nade(1)                  | Key to Property?:  |        |
|            | ts Requested(1)          | Access Details.:   |        |
| > Property | y Modifications Log      |  |        |
| > Links to | Portals                  |  |        |
| > Help Te  | xt                       |  |        |
| -          |                          | Export to Portals:   |        |
|            |                          |  | +      |
|            |                          | Save   |        |

3. Click the green Viewers button.

| Contact        | Contact Info | Inspection<br>Date | Туре | Interest | Contract<br>Taken | Price<br>Feedback | Follow<br>Up | Comments   |     |
|----------------|--------------|--------------------|------|----------|-------------------|-------------------|--------------|--|-----|
| Samantha Jones |              | 10-Nov-11          | Appt | Hot      | No                | \$1,100,000       | 0p           | Loved the property, would like to<br>inspect again with husband.   | edi |
| John O'Reilly  |              | 07-Dec-11          | OFI  | Warm     | Nø                | \$1,200,000       |              | Thought it was a fantasic property but not sure it was suitable for him.   | edi |
| Mary Smith     |              | 07-Nov-11          | Appt | Hot      | No                | \$1,150,000       |              | Mary wanted a second look at the<br>house with her husband after the<br>open house on the 5th. They really<br>love the property however need to<br>check finances. | edi |

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.

| Contact Info     Inspection<br>Date     Type     Interest<br>Taken     Contract<br>Taken     Price<br>Predback     Follow<br>Up     Comments     Image: |                   |
|---|-------------------|
| Samantha Jones       I/2 @ m       In Nov-11       Apple       Hot       No       \$1,100,000       Loved the property, would like to inspect again with husband       Contact:       Samantha Jones         John O'Reilly       I/2 @ m       07-Dec-11       OFI       Warm       No       \$1,200,000       Thought it was a fantasic property but not sure it was suitable for him.       Contact:       Samantha Jones         Mary Smith       I/2 @ m       07-Nov-11       Appl       Hot       No       \$1,150,000       Mary wanted a second look at the earth       Contract Taken       Hot  |                   |
| Mary Smith I @ III 07-Nov-11 Appt Het No \$1,150.000 Mary wanted a second look at the cont  |                   |
|   |                   |
| open house on the 5th. They really<br>fore the property however need to<br>check finances.  | ispect again with |

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

| Contact        | Contact Info | Inspection<br>Date | Туре | Interest | Contract<br>Taken | Price<br>Feedback | Follow<br>Up | Comments   |      |
|----------------|--------------|--------------------|------|----------|-------------------|-------------------|--------------|--|------|
| Samantha Jones |              | 10-Nov-11          | Appt | Hot      | No                | \$1,100,000       |              | Loved the property, would like to inspect again with husband.  | edit |
| John O'Reilly  |              | 07-Dec-11          | OFI  | Warm     | Nø                | \$1,200,000       |              | Thought it was a fantasic property<br>but not sure it was suitable for him.  | edit |
| Mary Smith     |              | 07-Nov-11          | Appt | Hot      | No                | \$1,150,000       |              | Mary wanted a second look at the<br>house with her husband after the<br>open house on the 5th. They really<br>love the property however need to<br>check finances. | edit |

2. Using the action icons icon

### **Vendor Report**

How do I Create a Vendor Report in Agentbox?

1. Search for your Property and open the Property Card

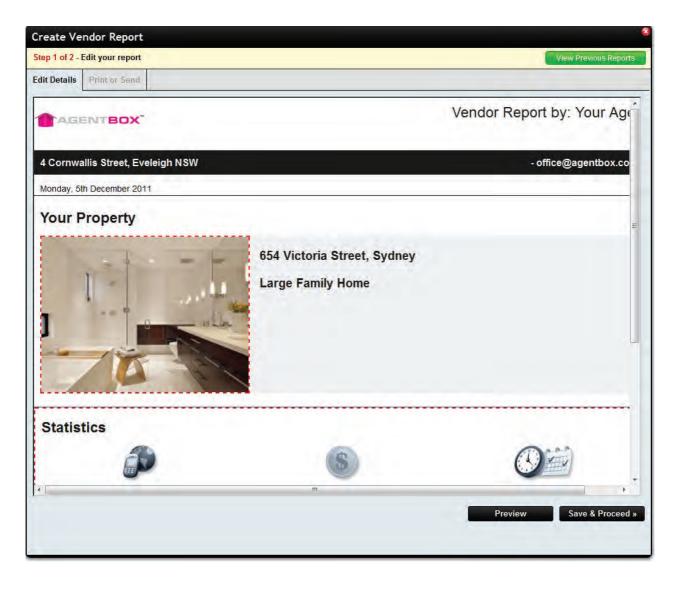
| Listing - ID#1P0001              | :: Listing : ID#1P0001 - 1 Jones Street, Copacabana                  | 0      |
|----------------------------------|--|--------|
| < Back to Properties             |  | l View |
| > Notes History                  | General For Sale Features OFI Agents & Contacts Resources Commission |        |
| > Recent Enquiries               | Status: Available Copy This Property                                 |        |
| > Property History               | For Sale/Lease: For Sale   |        |
| > Inspections (4) & Feedback (3) | Type:* Residential   | ~      |
| > Activity Schedules             | Category: * House  |        |
| > Offers Made(1)                 | Investment?:   |        |
| > Contracts Requested(1)         | Sale Method: Private Treaty  |        |
| > Property Modifications Log     | Authority: Exclusive  Property Name:                                 |        |
| > Links to Portals               | Level No.: Unit No.: Street No.: 1                                   |        |
| > Help Text                      | 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

\*Note - if you can't see the matching left property panel, click 'Full View' on the top right hand corner of the property card.

| < Close                 |  |  |  |  |  |  |  |
|-------------------------|--|--|--|--|--|--|--|
| > Notes H               | istory                                 |  |  |  |  |  |  |
| > Recent                | Enquiries                              |  |  |  |  |  |  |
| > Property History      |  |  |  |  |  |  |  |
| Y Inspecti              | ons (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 Vie                 |  |  |  |  |  |  |  |
| Activity                |  |  |  |  |  |  |  |
| > Activity Schedules    |  |  |  |  |  |  |  |
| > Offers N              |  |  |  |  |  |  |  |
| > Offers N<br>> Contrac | ts Requested(1)                        |  |  |  |  |  |  |
| > Offers N<br>> Contrac |  |  |  |  |  |  |  |
| > Offers M<br>> Contrac | ts Requested(1)<br>y Modifications Log |  |  |  |  |  |  |

- 2. Click on the green 'Feedback Report' button
- 3. Your Vendor Report will appear on screen



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

|             | ndor Report                                    |  | View Previous Repo   |
|-------------|--|--|--|
| dit Details | Print or Send                                  | ::Edit this Section: Ve                                      |  |
| AGI         | ENTBOX"  | Headline:<br>Comments:                                       | Campaign Overview  |
|             | allis Street, Eveleigh NSW<br>, 5th April 2012 | Title:<br>Open Homes:  | Statistics (total campaign)<br>opens: 2   visits: 3  |
| Camp        | aign Overview                                  | Viewed by Appointment:<br>Enquiries:                         | 2<br>4   |
| Your F      | Property                                       | Days on Market:<br>Advertised Price:<br>Internet Statistics: | [78]       Contact Agent   |
| a sta       |  | Marketing:   |  |
| -           |  | Contracts Issued:<br>Offers:                                 | 1  |
| -           |  | :: Details Display ::  |  |
|             |  | Period From:<br>Period To:                                   |  |
| Statis      | tics (total campai                             | gn) Contact Display:<br>Contact Sort By:                     | <ul> <li>✓ * Display the whole campaign rather than the date period.</li> <li>First Name Only</li> <li>✓</li> </ul>  |
|             |  |  | <ul> <li>Do not show 'Inspection Feedback' section.</li> <li>- Do not show 'Total Interest Levels' section.</li> <li>- Do not show 'Interest Levels By Date' section.</li> </ul> |

7. Buyer Feedback, Logged Enquiries, Offers Made and Contract Requests will be displayed in the report -This can be edited in the <u>Viewers</u> section of <u>Buyer Feedback</u>. \*Note: your vendor report may have a different layout.

8. 'Preview' or 'Save and Proceed' to Print or Send via Email

| Create Vendor             | Report   | 4                     |
|---------------------------|--|-----------------------|
| Step 2 of 2 - Send /      | Print your report  | View Previous Reports |
| Edit Details Print        | t or Send  |                       |
|                           | Print PDF  |                       |
| Add Recipient:            | Please enter Name Add  |                       |
| Delivery To:              | I Samantha Jones   |                       |
|                           |  |                       |
|                           |  |                       |
|                           |  |                       |
|                           |  |                       |
|                           |  |                       |
| Reply From:<br>Subject: * | Office: Your Agency (office@agentbox.com.au)   |                       |
| Message: *                | B I U I I I I I I I I I I I I I I I I I  |                       |
|                           | Х 础 ユ 田 岡 山 当 ♥ +   ●   <u>A</u> + 型 +   ▼ ♥ +   団 0 三 準.  |                       |
|                           | 図  _  /**(> /*, / 1  ==  -×, ×*  Ω → ●部站   |                       |
|                           |  |                       |
|                           |  |                       |
|                           |  |                       |
|                           |  |                       |
|                           |  |                       |
|                           |  |                       |
|                           | Print PDF  |                       |
| -                         | Sector Se |                       |
| « Previous Step           | Save Send Now  | 3                     |
|                           |  |                       |

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 |            |         |      |             | 4          |
|---|------------|---------|------|-------------|------------|
|   |            |         | Cre  | ate New Ven | dor 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

| Stack to Properties         > Notes History         > Recent Enquiries         > Property History         > Inspections (4) & Feedback (3)         > Activity Schedules         > Offers Made(1)         > Contracts Requested(1)         > Property Modifications Log         > Help Text         Steel Name: *         Street Name: *         Suburb: *         Address Format:         Ide Address ?:         Tick to edit address or your web site.         Tick to edit address for your web display format.         Address Format:         Ideress Details:         Export to Property?:         Access Details:   | isting - ID#1P0001         | :: Listing : ID#1P0001 - 1 Jones Street, Copacabana          | •         |
|--|----------------------------|--|-----------|
| > Notes History       General       For Sale       Features       DFI       Agems & Contacts       Resources       Commission         > Property History       Status:       Available       Cooy This Property         > Inspections (4) & Feedback (3)       Type: *       Residential       Cooy This Property         > Activity Schedules       Type: *       Residential       Cooy This Property         > Offers Made(1)       Sale Method:       Private Treaty          > Contracts Requested(1)       Authority:       Exclusive          > Property Modifications Log       Property Name:           > Links to Portals       Level No:       1           > Help Text       State:       Operative Street No:       1          Hide Address?       Tick to address for your web site.       NSW          Hide Address?       Tick to address for your web site.       NSW          Address Format:       1.Jones Street       Google Map:       Residential          Access Details::       Indenses       Indenses       Hide Street View       Hide "What's around"  | k to Properties            |  | Full View |
| > Property History       Status:       Available       Copy This Property         > Inspections (4) & Feedback (3)       For Sale/Lease:       For Sale       Vendor Preview Link         > Activity Schedules       Type: *       Residential       Vendor Preview Link         > Offers Made(1)       Sale Method:       Private Treaty       Vendor Preview Link         > Contracts Requested(1)       Authority:       Exclusive       Vendor Preview Link         > Property Modifications Log       Property Name:       Property No.:       1         > Links to Portals       Level No.:       Unit No.:       Street No.:       1         > Help Text       Street No.:       1       Street vendor Web site.       NSW         Hide Address Format:       Lones Street       NSW       Vendor Web site.         Tick to edit address for your web display format.       Address Format:       Lones Street         Googe Map:       Re-Position Marker       Hide Street View       Hide "What's around"         Key to Property?:       Access Details.:   | es History                 |  |           |
| > Property History       For Sale/Lease:       Image: Contracts Reguested(1)         > Activity Schedules       Category:*       House       Image: Contracts Reguested(1)         > Offers Made(1)       Sale Method:       Private Treaty       Image: Contracts Reguested(1)         > Property Modifications Log       Property Name:       Image: Contracts Reguested(1)       Image: Contracts Reguested(1)         > Links to Portals       Level No.:       Unit No.:       Street No.:       1         > Help Text       Street Name:*       Dones       Street No.:       1         Hide Address?:       Tick to hide the address on your web site.       Tick to edit address for your web display format.         Address Format:       Itomes Street       Hide "What's around"         Key to Property?:       Access Details.:       Image: Contract Street View       Hide "What's around"   | ent Enquiries              | Status: Available - Conv. This Boo                           |           |
| > Inspections (4) & Feedback (3)       Type: *       Residential •         > Activity Schedules       Category: *       House •         > Offers Made(1)       Sale Method:       Private Treaty •         > Contracts Requested(1)       Authority:       Exclusive •         > Property Modifications Log       Property Name:   | perty History              | Copy files Pro   |           |
| > Offers Made(1)         > Contracts Requested(1)         > Property Modifications Log         > Links to Portals         > Links to Portals         > Help Text         Unit No.:         Street Name:         Suburb:         COPACABANA (2251)         State:         NSW         Address?:         Tick to hide the address on your web site.         Tick to edit address for your web display format.         Address Format:         Google Map:         Re-Postion Marker         Hide Street View         Hide "What's around"         Key to Property?:         Access Details.:   | ections (4) & Feedback (3) |  |           |
| <ul> <li>&gt; Offers Made(1)</li> <li>&gt; Contracts Requested(1)</li> <li>&gt; Property Modifications Log</li> <li>&gt; Links to Portals</li> <li>&gt; Help Text</li> <li>Sale Method: Private Treaty  <ul> <li>Authority: Exclusive</li> <li>Property No.: 1</li> <li>Unit No.: Street No.: 1</li> <li>Level No.: Unit No.: Street No.: 1</li> <li>Street Name: Unit No.: Street Type: Street  <ul> <li>Street Name: COPACABANA (2251)</li> <li>State: * NSW</li> </ul> </li> <li>Hide Address?: Tick to hide the address on your web site.<br/>Tick to edit address for your web display format.</li> <li>Address Format: Unes Street</li> <li>Google Map: Re-Position Marker Hide Street View Hide "What's around"</li> <li>Key to Property?: Access Details.:</li> </ul></li></ul>  | vity Schedules             | Category: * House  |           |
| <ul> <li>Contracts Requested(1)</li> <li>Property Modifications Log</li> <li>Links to Portals</li> <li>Help Text</li> <li>Keet Name: * Unit No: Street No.: 1</li> <li>Street Name: * Unit No.: Street Type: Street •</li> <li>Street Name: * COPACABANA (2251) State: * NSW •</li> <li>Hide Address?: Tick to hide the address on your web site.<br/>Tick to edit address for your web display format.</li> <li>Address Format: 1 Jones Street</li> <li>Google Map: Re-Position Marker • Hide Street View • Hide "What's around"</li> <li>Key to Property?: Access Details:</li> </ul>  | rs Made(1)                 |  |           |
| > Property Modifications Log   > Links to Portals   > Help Text     Property Name:   Level No.:   Unit No.:   Street Name:   Jones   Street Type:   Street *   Suburb:   Mide 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.:   |                            | i mate roaty   |           |
| > Links to Portals   > Help Text     Level No.:   Unit 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: I Jones Street Google Map: Re-Position Marker Hide Street View Hide "What's around" Key to Property?: Access Details.:  |                            |  |           |
| > Help Text       Street Name: *       Jones       Street Type:       Street       Image: Street       Im  |                            |  |           |
| Suburb:*       COPACABANA (2251)       State: *       INSW         Hide Address?:       Tick to hide the address on your web site.       Tick to edit address for your web display format.         Address Format:       Jones Street         Google Map:       Re-Position Marker       Hide Street View         Key to Property?:       Access Details.:   |                            |  | -         |
| 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.:  | Text                       | Suburb: * COPACABANA (2251) State: * NSW                     |           |
| Address Format: 1 Jones Street   Google Map: Re-Position Marker   Key to Property?:   Access Details.:   |                            | Hide Address?: Tick to hide the address on your web site.    |           |
| Google Map:       Re-Position Marker       Hide Street View       Hide "What's around"         Key to Property?:       Access Details.:       Image: Comparison of the street View of the street Vie |                            |  |           |
| Key to Property?:  |                            |  |           |
| Access Details.:   |                            | Google Map: Re-Position Marker Hide Street View Hide "What's | around"   |
|  |                            |  |           |
| Export to Portais:   |                            | Access Details.:   |           |
| Export to Portais:   |                            |  |           |
| Export to Portals:   |                            |  |           |
| Export to Portals:   |                            |  |           |
| Export to Portais:   |                            |  |           |
|  |                            | Export to Portals:   |           |
|  |                            |  |           |
| Save   |                            | Save   |           |

2. Click on the Offers Made tab on the Left Panel

| 🟫 Listi          | ing - ID#1P0001          |   |  |  |
|------------------|--------------------------|---|--|--|
| < Back to        | < Back to Properties     |   |  |  |
| > Notes H        | History                  |   |  |  |
| > Recent         | Enquiries                |   |  |  |
| > Propert        | ty History               |   |  |  |
| > Inspect        | tions (4) & Feedback (3) |   |  |  |
| > Activity       | Schedules                |   |  |  |
| ✓ Offers Made(1) |                          |   |  |  |
| Date             | Offer                    | d |  |  |
|                  |                          | + |  |  |
| > Contrac        | cts Requested(1)         |   |  |  |
| > Propert        | ty Modifications Log     |   |  |  |
| > Links to       | o Portals                |   |  |  |
| > Help Te        | ext                      |   |  |  |

3. Click on Add

| Buyer: *        | Enter Contact name or email |
|-----------------|-----------------------------|
| Offer \$:*      |                             |
| Offer Date:     | 05 04 2012                  |
| Comments:       | A 107                       |
| Email to Vendor | ?: 🗆                        |
| Print Letter?:  |                             |
|                 | Save                        |

4. Enter Buyer Name, Offer, Comments, Offer Date

| Make an Off     | er 🧳                                    |  |
|-----------------|---|--|
| Buyer: *        | Mary May                                |  |
| Offer \$: *     | 1150000                                 |  |
| Offer Date:     | 05 04 2012                              |  |
| Comments:       | Contact ASAP with the vendor's decision |  |
| Email to Vendor | ?: 🗆                                    |  |
| Print Letter?:  |   |  |
| Send From:      | By default will be yourself             |  |
|                 | Save                                    |  |
|                 | Juve                                    |  |
|                 |   |  |

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. <u>Search for your Property</u> and open the <u>Property Card</u>

| Listing - ID#1P0001              | :: Listing : ID#1P0001 - 1 Jones Street, Copacabana  |
|----------------------------------|--|
| < Back to Properties             | 👬 @ 🖩 🖻 🗭 🎓 🕼 🔝 🔛 🔛 🖓 🚽 🖓 🔬 🛛 Full View  |
| > Notes History                  | General For Sale Features OFI Agents & Contacts Resources Commission   |
| > Recent Enquiries               | Status: Available  Copy This Property  |
| > Property History               | For Sale/Lease: For Sale Vendor Preview Link   |
| > Inspections (4) & Feedback (3) | Type:* Residential   |
| > Activity Schedules             | Category: * House  |
| > Offers Made(1)                 | Investment?:   |
| > Contracts Requested(1)         | Sale Method: Private Treaty  Authority: Exclusive  |
| > Property Modifications Log     | Authority: Exclusive  Property Name:   |
| > Links to Portals               | Level No.: Unit No.: Street No.: 1   |
| > Help Text                      | Street Name: *         Jones         Street Type:         Street            Suburb: *         COPACABANA (2251)         State: *         NSW |
|                                  | Hide Address?:   |
|                                  | Address Format: 1 Jones. Street  |
|                                  | Google Map: Re-Position Marker Hide Street View Hide "What's around"   |
|                                  | Key to Property 7:   |
|                                  | Export to Portals:   |
|                                  | Save   |

2. Click on the Offers Made tab on the Left Panel

| Listing - ID#1P0001  |   |     |  |
|--|---|-----|--|
| < Back t   | o Properties  |     |  |
| > Notes  | History   |     |  |
| > Recen  | t Enquiries   |     |  |
| > Prope  | rty History   |     |  |
| > Inspec   | tions (4) & Feedback (3)  |     |  |
| > Activit  | y Schedules   |     |  |
| ✓ Offers   | Made(1)   |     |  |
| Date   | Offer   | Add |  |
| 05/04/20   | 012 \$1,150,000 Mary May<br>Contact ASAP with the<br>vendor\'s decision |     |  |
| Contracts Requested(1)     Bronorty Modifications Log                    |   |     |  |
| <ul> <li>Property Modifications Log</li> <li>Links to Portals</li> </ul> |   |     |  |
| > Help Text  |   |     |  |

# 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              | :: Listing : ID#1P0001 - 1 Jones Street, Copacabana   |  |  |
|----------------------------------|---|--|--|
| < Back to Properties             | 👫 @ 🖬 🖻 🗭 🎓 🐨 🕼 🛗 🖹 🚘 🦄 📶 ج 💩 🛛 Full View   |  |  |
| > Notes History                  | General For Sale Features OFI Agents & Contacts Resources Commission  |  |  |
| > Recent Enquiries               | Status: Available Copy This Property  |  |  |
| > Property History               | For Sale/Lease: For Sale  |  |  |
| > Inspections (4) & Feedback (3) | Type: * Residential   |  |  |
| > Activity Schedules             | Category:* House  |  |  |
| > Offers Made(1)                 | Investment?:  |  |  |
| > Contracts Requested(1)         | Sale Method: Private Treaty  Authority: Exclusive   |  |  |
| > Property Modifications Log     | Authority: Exclusive  Property Name:  |  |  |
| > Links to Portals               | Level No.: Unit No.: 1  |  |  |
| > Help Text                      | Street Name: *       Jones       Street Type:       Street       Image: Street         Suburb: *       COPACABANA (2251)       State: *       INSW       Image: Street         Hide Address?:       Inick to hide the address on your web site.       Image: Street       Image: Street       Image: Street         Address Format:       Image: Street       Image: Street       Image: Street       Image: Street |  |  |
|                                  | Google Map: Re-Position Marker Hide Street View Hide "What's around"<br>Key to Property?: Access Details.:  |  |  |
|                                  | Export to Portals:  |  |  |

2. Click on Contracts Requested tab on the Left Panel

| 合 Lis                | ting - ID#1P0001      |           |  |
|----------------------|-----------------------|-----------|--|
| < Back to Properties |                       |           |  |
| > Notes              | > Notes History       |           |  |
| > Recei              | > Recent Enquiries    |           |  |
| > Prope              | erty History          |           |  |
| > Buyer              | Feedback & Vendor I   | Report(1) |  |
| > Offers             | s Made                |           |  |
| ∽ Contr              | acts Requested        |           |  |
| Date                 | Contact               | Add       |  |
|                      |                       |           |  |
| > Prope              | rty Modifications Log |           |  |
| > Links              | to Portals            |           |  |
| > Help               | Text                  |           |  |

3. Click on Add

| Make a Contract Request |                             |  |
|-------------------------|-----------------------------|--|
| Buyer: *<br>Comments:   | Enter Contact name or email |  |
|                         | Save                        |  |
|                         |                             |  |

#### 4. Enter Buyer Name and Comments

| Buyer: *  | Mary May   |
|-----------|--|
| Comments: | Has a meeting on Friday with solicitor.<br>Discussing finances with husband and<br>will contact us ASAP. |
|           | Save   |
|           | 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

| Listing - ID#1P0001                 | :: Listing : ID#1P0001 - 1 Jones Street, Copacabana                  | 8 |
|-------------------------------------|--|---|
| < Close                             | 🛗 @ 🖩 🖻 🗭 🎓 🕼 📝 🛗 🖹 🖴 🎠 📶 🕀 💩 🛛 Full Vie                             | w |
| > Notes History                     | General For Sale Features OFI Agents & Contacts Resources Commission |   |
| > Recent Enquiries                  | Status: Available  | - |
| > Property History                  | For Sale/Rental: For Sale  |   |
| > Buyer Feedback & Vendor Report(0) | Type: * Residential  |   |
| > Offers Made                       | Category: * House Copy This Property                                 |   |
| > Contracts Requested               | Investment?:  Vendor Preview Link Vendor Preview Link                | ш |
| > Property Modifications Log        | Sale Method: Private Treaty  |   |
| > Links to Portals                  | Authority: Exclusive  Property Name:                                 |   |
| > Help Text                         | Level No.: Unit 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                                       |   |
|                                     | 2 · · · · · · ·  | * |
|                                     | Save   |   |

2. Click on the Contracts Requested tab on the Left Panel

| Listing - ID#1P0001  |                          |     |  |
|----------------------|--------------------------|-----|--|
| < Back to Properties |                          |     |  |
| > Notes H            | > Notes History          |     |  |
| > Recent             | Enquiries                |     |  |
| > Property           | > Property History       |     |  |
| > Buyer F            | eedback & Vendor Report( | 1)  |  |
| > Offers N           | lade                     |     |  |
| ✓ Contrac            | ts Requested             |     |  |
| Date                 | Contact                  | Add |  |
| 24/11/2011           | May, Mary                | *   |  |
|                      |                          |     |  |
| > Property           | y Modifications Log      |     |  |
| > Links to           | Portals                  |     |  |
| > Help Te            | xt                       |     |  |

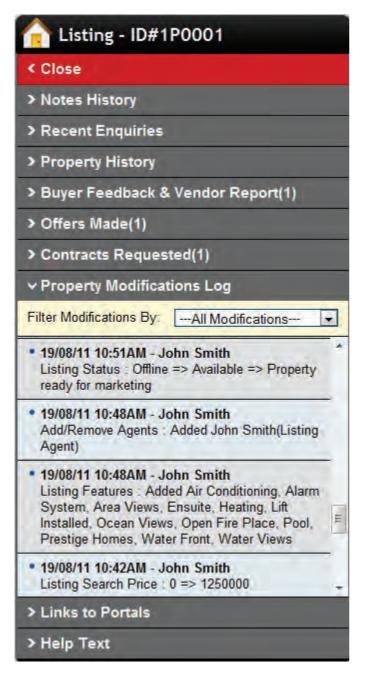
# **View Property Modifications**

# View Property Modifications

1. Search for your Property and open the Property Card

| Listing - ID#1P0001              | :: Listing : ID#1P0001 - 1 Jones Street, Copacabana                  |  |  |
|----------------------------------|--|--|--|
| < Back to Properties             | 👬 @ 🖩 🖻 🖗 🎓 🔗 📝 🛗 🖹 🚘 🦹 📶 ج 💩 🛛 Full View                            |  |  |
| > Notes History                  | General For Sale Features OFI Agents & Contacts Resources Commission |  |  |
| > Recent Enquiries               | Status: Available Copy This Property                                 |  |  |
| > Property History               | For Sale/Lease: For Sale   |  |  |
| > Inspections (4) & Feedback (3) | Type: * Residential  |  |  |
| > Activity Schedules             | Category: * House  |  |  |
| > Offers Made(1)                 | Investment?:   |  |  |
| > Contracts Requested(1)         | Authority: Exclusive   |  |  |
| > Property Modifications Log     | Authority: Exclusive  Property Name:                                 |  |  |
| > Links to Portals               | Level No.: Unit No.: Street No.: 1                                   |  |  |
| > Help Text                      | Street Name: * Jones Street Type: Street                             |  |  |
| - Help Jerr                      | 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 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).



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              | :: Listing : ID#1P0001 - 1 Jones Street, Copacabana                  |  |  |
|----------------------------------|--|--|--|
| < Back to Properties             | 👬 @ 🖩 🖻 🖗 🎓 🔗 📝 🛗 🖹 🚘 🦹 📶 ج 💩 🛛 Full View                            |  |  |
| > Notes History                  | General For Sale Features OFI Agents & Contacts Resources Commission |  |  |
| > Recent Enquiries               | Status: Available Copy This Property                                 |  |  |
| > Property History               | For Sale/Lease: For Sale   |  |  |
| > Inspections (4) & Feedback (3) | Type: * Residential  |  |  |
| > Activity Schedules             | Category: * House  |  |  |
| > Offers Made(1)                 | Investment?:   |  |  |
| > Contracts Requested(1)         | Authority: Exclusive   |  |  |
| > Property Modifications Log     | Authority: Exclusive  Property Name:                                 |  |  |
| > Links to Portals               | Level No.: Unit No.: Street No.: 1                                   |  |  |
| > Help Text                      | Street Name: * Jones Street Type: Street                             |  |  |
| - Help Jerr                      | 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).

| Listing - ID#1P0001  |  |  |
|--|--|--|
| < Back to Properties   |  |  |
| > Notes History  |  |  |
| > Recent Enquiries   |  |  |
| > Property History   |  |  |
| > Buyer Feedback & Vendor Report(1)  |  |  |
| > Offers Made(1)   |  |  |
| > Contracts Requested(1)   |  |  |
| > Property Modifications Log   |  |  |
| ✓ Links to Portals   |  |  |
| Click to view similar current listings and recent sales<br>on property portals |  |  |
| Realestate.com.au current listings recent sales                                |  |  |
| Domain.com.au <u>current listings</u> recent sales                             |  |  |
|  |  |  |
| > Help Text  |  |  |

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. <u>Search for your Property</u> and open the <u>Property Card</u> 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: *        | Director |  |
|----------------|----------|--|
| Agent Split %: | 50       |  |

3. Ensure the Listing Agent, Selling Agent and any referral Agents are added to the <u>Agents and Contacts</u> tab on the property card.

| :: Listing : #1P0008 - 654 Victoria Street, Sydney |  |           |
|--|--|-----------|
|  |  | Full View |
| General For Sale                                   | Features OFI Agents & Contacts Resources Commission  |           |
| C:: Assign related Ag                              | ents ::-   | 1 4       |
| Role:  | Selling Agent   (uncheck to de-sele  | ect)      |
| Agent:   | Assign your agents Add   |           |
| Selected Agents:                                   | <ul> <li>✓ John Smith (Listing Agent)</li> <li>✓ Melanie Thompson (Selling Agent)</li> </ul> | F         |
| Appear on Site:                                    | <ul> <li>✓ John Smith (Listing Agent)</li> <li>✓ Melanie Thompson (Selling Agent)</li> </ul> |           |
| Save   |  |           |

4. Ensure all the property sale details e.g. Sale price and commission fee or % have been added to the property status.

| Warning!          |                       |
|-------------------|-----------------------|
| Change Sta        | atus to Exchanged?    |
| Exchanged Date:   | 05 12 2011            |
| Unconditional @   | / Conditional 🔘       |
| Expected Settleme | ent: 16 01 2012       |
| Sold Price (\$):* | 1000000               |
| Display Price:    | \$1,000,000           |
| Commission:*      | 2 🔍 🕲 % 🔘 Flat Fee \$ |
| Deposit:*         | 10 🖲 % 🔘 Flat Fee \$  |
| Export to Portal: | 1                     |
| -                 |                       |
|                   |                       |
| 1                 |                       |
|                   | Yes No                |
|                   |                       |

5. Click on the Commission Tab on the property card.

| :: Comm       | ission : i   | #1P0008        | - 654   | Victoria Street  | , Sydney         |                        |              |
|---------------|--------------|----------------|---------|--|------------------|------------------------|--------------|
| # @           |              |                | 6       |  |                  | 100                    | Full View    |
| General       | For Sale     | Features       | OFI     | Agents & Contacts  | Resources        | Commission             |              |
| Step 1 of 2   | - Setup Co   | mmission De    | eductio | n Splits   |                  |                        | *            |
| Select Tem    | plate:       |                |         |  |                  |                        |              |
| 🗆 Is this a : | staged settl | ement?         |         |  |                  |                        |              |
| Standa        | rd Commis    | sion Split Te  | emplate | 1 it-  |                  | -                      | 1            |
| deduction     | ordering sir | nply grab an i | tem bel | tions are calculated fro<br>ow, drag and drop it int<br>he Add Commission Fo | o the order of y | our preference. Please | e Note you   |
| Sold Pric     | e: \$1,000,0 | 00.00 - Gross  | Comm    | ission 2%  |                  | Add Con                | nmission Fee |
| 1.            |              |                |         | Agent Commiss  | іоп              | _                      | ×            |
| 2.            |              |                |         | Office Commiss   | ion              |                        |              |
|               |              |                |         |  |                  | Save                   | & Proceed »  |

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
- $_{\odot}$   $\,$  Select Advertising Fee from the drop down menu  $\,$
- $_{\odot}$   $\,$  Click Yes to insert

0

| :: Commission : #1PC                          | 0008 - 654 Victoria Street, Sydney  | 08          |
|---|---|-------------|
| # @ = • 9                                     |   | Full View   |
|   | Add Commission Fee  |             |
| Step 1 of 2 - Setup Commi<br>Select Template: | Item Choose a Commission Fee  Yes No Commission. To chang your preference. Pleas w. |             |
| 1.  | Agent Commission  | ×           |
| 2.  | Office Commission   | ×           |
|   | Save  | & Proceed » |

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.

- $_{\odot}$  1. Agent Commission
- $_{\odot}$  2. Office Commission

| :: Com                          | nission : a   | #1P0008  | - 654                              | Victoria                              | a Street      | , Sydney       |             |              | •           |
|---------------------------------|---|--|------------------------------------|---------------------------------------|---------------|----------------|-------------|--------------|-------------|
| # 0                             |   | <b>P</b>   | 6                                  |                                       |               |                | 4 la        | ő            | Full View   |
| General                         | For Sale  | Features   | OFI                                | Agents &                              | Contacts      | Resources      | Commi       | ission       |             |
| Step 1 of                       | 2 - Setup Co  | mmission D   | eduction                           | Splits                                | -             |                |             |              | 1           |
| Please s<br>deductio<br>can add | a staged settl<br>ard Commis<br>pecify the ord<br>n ordering sin<br>additional de | ement?<br>sion Split Te<br>der on how th<br>nply grab an<br>ductions by c<br>00.00 - Gross | e deduct<br>tem belo<br>licking th | ons are ca<br>w, drag an<br>e Add Cor | d drop it int | o the order of | your prefer | ence. Please |             |
| 1.                              | ce. 41,000,0  | 00.00 - 0105   | Comm                               |                                       | Commiss       | ion            | _           | (Addread     | ×           |
| 3.                              | 2.  |  |                                    | нует                                  | Agent C       | ommission      |             |              |             |
|                                 |   |  |                                    |                                       |               |                |             | Save         | & Proceed » |

8. Click Save and Proceed to enter the Agent Commission.

| :: Commis               | ssion : # | #1P0008    | - 654    | Victoria S    | Street,    | Sydney        |             |                  |
|-------------------------|-----------|------------|----------|---------------|------------|---------------|-------------|------------------|
| # @                     |           |            | 6        |               |            |               | 100         | Full View        |
| General F               | or Sale   | Features   | OFI      | Agents & Co   | ontacts    | Resources     | Commission  |                  |
| Step 2 of 2 -           | Specify C | ommission  | Split De | tails         |            |               |             |                  |
|                         |           | Gross_co   | mmissior | n (based on ) | 2% of \$1. | 000,000.00) = | \$20,000.00 |                  |
| Item                    |           | % or \$Fee | Value    | Amount        | Recipie    |               |             |                  |
| 1. Agent<br>Commission  | n         | %          | 100      | \$20,000.00   |            |               | Dedu        | uction Add Agent |
| 1                       |           | _          | C        | ommission     | Balance    | = \$0.00      |             |                  |
| 2. Office<br>Commission | n         | % -        | 100      | \$0.00        | Your Ag    | ency          |             |                  |
| Print Com               |           | 11         |          |               |            |               |             |                  |
| « Previou               |           |            |          |               |            |               | -           | Finish           |
| « Fievior               | is step   |            |          |               |            |               |             | annsn            |
|                         |           |            |          |               |            |               |             |                  |

#### 1. Agent Commission -

- $_{\odot}$  Select % from the drop down, and then enter <u>100%</u>. The gross commission balance will be divided between the agents.
- $_{\odot}$   $\,$  Add in the Listing Agent and the Selling Agent by clicking the green Add Agent button.

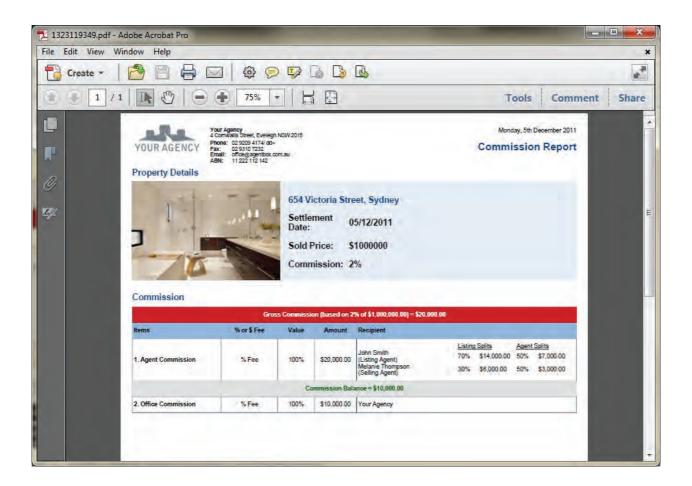
|                 | t to Agent Commissi | on |
|-----------------|---------------------|----|
| Choose Agent    |                     |    |
| Choose Agent    |                     |    |
| John Smith (Lis |                     |    |
| Melanie Thomp   | son (Selling Agent) |    |

- 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.
- $\circ$  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.

| ieneral Fo              | Sale Features | OFI       | Agents & Co   | ontacts Resour  | Ces Commission   |  |
|-------------------------|---------------|-----------|---------------|---|--|--|
|                         | Gross co      | ommission | n (based on 1 | 2% of \$1,000,000.  | 00) = \$20,000.00  |  |
| ltem                    | % or \$Fee    | Value     | Amount        | Recipient   |  |  |
| 1. Agent<br>Commission  | %             | 100       | \$20,000.00   | John Smith<br>(Listing Agent)<br>Melanie<br>Thompson<br>(Selling Agent) | Listing Splits         Agen           70         \$14,000.0050           30         \$6,000.0050 |  |
|                         |               | Con       | nmission Ba   | lance = \$10,000.0  | 0  |  |
| 2. Office<br>Commission | %             | 100       | \$10,000.00   | Your Agency   |  |  |

2. Office Commission - By default will be 100% of the balance.

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. <u>Search for your Property</u> and open the <u>Property Card</u> and select the commissions tab.
- 2. Ensure the Agents percentage split in their staff card is <u>100%</u> in their <u>staff card</u>.

| Role: *        | Sales Representative |  |
|----------------|----------------------|--|
| Agent Split %: | 100                  |  |

3. Ensure the Listing Agent, Selling Agent and any Referral Agents are added to <u>Agents and Contacts</u> tab on the property card.

| :: Listing : #1P0     | 0008 - 654 Victoria Street, Sydney   | 0 0       |
|-----------------------|--|-----------|
|                       |  | Full View |
| General For Sale      | Features         OFI         Agents & Contacts         Resources         Commission          |           |
| C:: Assign related Ag | gents ::   | 7 4       |
| Role:                 | Selling Agent (uncheck to de-select  | t)        |
| Agent:                | Assign your agents Add   |           |
| Selected Agents:      | ✓ John Smith (Listing Agent) ✓ Melanie Thompson (Selling Agent)                              | E         |
| Appear on Site:       | <ul> <li>✓ John Smith (Listing Agent)</li> <li>✓ Melanie Thompson (Selling Agent)</li> </ul> |           |
| Save                  |  | 1 -       |

4. Ensure all the property sale details e.g. Sale price and commission fee or % have been added to the property status

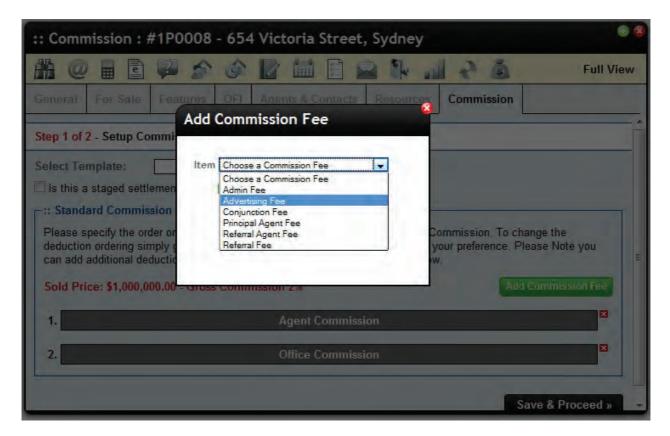
| Warning!                        | *   |
|---------------------------------|-----|
| Change Status to Exchanged?     |     |
| Exchanged Date: 05 12 2011      |     |
| Unconditional 🔍 / Conditional 🔘 |     |
| Expected Settlement: 16 01 2012 |     |
| Sold Price (\$);* 1000000       |     |
| Display Price: \$1,000,000      |     |
| Commission:* 2 🔍 % 🔘 Flat Fee   | \$  |
| Deposit:* 10 0 % O Flat Fee     | \$  |
| Export to Portal:               |     |
|                                 | 7   |
|                                 |     |
|                                 |     |
| Yes                             | -   |
|                                 | - 1 |

#### 5. Click on the Commission Tab

|           |                 | 10 30          | 9        |  |                  | 100                    | Full View    |
|-----------|-----------------|----------------|----------|--|------------------|------------------------|--------------|
| ieneral   | For Sale        | Features       | OFI      | Agents & Contacts  | Resources        | Commission             |              |
| tep 1 of  | 2 - Setup Co    | mmission De    | eductio  | n Splits   |                  |                        |              |
| elect Te  | emplate:        | 1              |          |  |                  |                        |              |
| Is this a | a staged settl  | ement?         |          |  |                  |                        |              |
| :: Stand  | lard Commis     | sion Split Te  | mplate   | r ít-  |                  |                        |              |
| deductio  | on ordering sin | nply grab an i | tem belo | tions are calculated fro<br>ow, drag and drop it int<br>he Add Commission Fe | o the order of y | our preference. Please |              |
| Sold Pr   | ice: \$1,000,0  | 00.00 - Gross  | Comm     | ission 2%  |                  | Add Con                | nmission Fee |
| 1.        |                 |                |          | Agent Commissi   | оп               | -                      | ×            |
|           | _               | _              |          | Office Commissi  | on               | _                      |              |

#### 6. To add in an additional fee, in this example an advertising fee

- Click the green Add Commission Fee button
- $_{\rm O}$   $\,$  Select Advertising Fee from the drop down menu
- $_{\odot}$  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

| 008 - 654Victoria Street, Sydney  | 008 - 654 V  | ission:#1P0                                 | nmi                                       | Co                                      |
|---|--|---|---|---|
| 🎓 🚳 📝 🛗 🖹 🚘 🎠 📶 👌 🗴 🛛 Full View   | \$ \$ L  |   | 0   |   |
| res OFI Agents & Contacts Resources Commission  | ures OFI A   | For Sale Feat                               | 1 3                                       | ener                                    |
| III Template ::<br>by the deductions are calculated from the Gross Commission. To change the<br>b an item below, drag and drop it into the order of your preference. Please Note you<br>by clicking the Add Commission Fee button below.<br>Gross Commission 2%<br>Add Commission Fee | plit Template ::-<br>now the deduction<br>ab an item below,<br>s by clicking the A | ordering simply gra<br>dditional deductions | s a s<br>ndar<br>e spe<br>tion c<br>dd ad | l Is ti<br>Sti<br>Plea<br>dedu<br>can i |
| Office Commission   |  |   |   | 1.                                      |
| Advertising Fee   |  |   | 2   | 3.                                      |
| Agent Commission  |  |   |   | 4.                                      |
| Office Commission<br>Adventising Fee  |  |   | 2.[                                       | 3.                                      |

- 8. Click Save and Proceed to enter the Agent Commission.
  - 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
  - $_{\odot}$  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                          |          | 654     | Victoria S    | Street, Sydn  | ey  | Full View     |  |
|--|----------|---------|---------------|---|---|---------------|--|
| General For Sale                       | Features | OFI     | Agents & Co   | ontacts Resou   | Commission  |               |  |
|  | Gross co | mmissio | n (based on 2 | 2% of \$1,000,000   | .00) = \$20,000.00  |               |  |
| Item % or \$Fee Value Amount Recipient |          |         |               |   |   |               |  |
| 1. Office<br>Commission                | S Fee 💌  | 1500    | \$1,500.00    | Your Agency   |   |               |  |
|  |          | Cor     | nmission Ba   | lance = \$18,500.   | 00  |               |  |
| 2. Advertising Fee                     | S Fee 💌  | 500     | \$500.00      | Your Agency   |   |               |  |
|  |          | Cor     | nmission Ba   | lance = \$18,000.   | 00  |               |  |
| 3. Agent<br>Commission                 | %        | 100     | \$18,000.00   | John Smith<br>(Listing Agent)<br>Melanie<br>Thompson<br>(Selling Agent) | Listing Splits Age<br>70 % \$12,600.00100<br>30 % \$5,400.00 100<br>Deput | )% \$5,400.00 |  |

9. Click Finish to complete and Print Commission to print a report for the agent/s.

| 1323120127.pdf - Adobe Acrobat Pro |                             | -   | _              |               | -             |       |                   | • X   |
|------------------------------------|-----------------------------|---|----------------|---------------|---------------|-------|-------------------|-------|
| File Edit View Window Help         | -                           |   |                |               |               |       |                   | *     |
| Create - 🔁 🗎 🦷                     |                             |   |                | £             |               |       | _                 | 2     |
| E 💽 1 /1 🔣 🖉                       | 91.8%                       |   | 3              |               |               | Tools | Comment           | Share |
| YOUR AGENCY Fax                    | ail: office@agentbox.com.au | 2015  |                |               |               |       | nday, 5th Decembe |       |
|                                    | s s                         | 654 Victoria<br>Settlement<br>Date:<br>Sold Price:<br>Commissio | 05/12<br>\$100 | /2011         |               |       |                   |       |
| Commission                         | Cross Cor                   | mmission (base  | d on 2% of     | 4 000 000 001 | - \$20,000,00 |       |                   | _     |
| Items                              |                             | alue Amo  |                | ipient        | 420,000.00    |       |                   |       |
| 1. Office Commission               | The second second           | 500.00 \$1,50   |                | Agency        |               |       |                   |       |
| TA STREAM BOLING                   | T ALCONGO TON               |   |                | \$18,500.00   |               |       |                   |       |
| 2. Advertising Fee                 | \$ Flat Fee \$5             | 00.00 \$50  | a second a     | Agency        |               |       |                   |       |
|                                    | 1 23 4 23 1                 | Commissi  | on 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.

- o Main Contact Panel & Tabs
- O Property Action Icons
- o Left Panel Tabs

#### **Contact Panel Tabs**

Main Contact Panel & Tabs

| 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.

- <u>Contact Card</u> In this section you can add the main contact information e.g. Phone, Address etc you can also <u>subscribe</u> them to newsletters, <u>add related contacts</u>, <u>properties</u> and setup a <u>letter head</u> for mailings.
- <u>Requirements</u> In this section you can add the buyer/investor/tenant etc requirements for your automatic buyer alert and match contact to property tools.
- <u>Related Properties</u> In this section you can view all related properties to a contact and how they are related.
- <u>Supplier Items-</u> In this section you can add/edit products and pricing for your suppliers, which can then be used when logging <u>marketing funds.</u>

| :: Contact :                          | : Joseph Thor                             | mas                  |                                      |               | 0         |
|---------------------------------------|---|----------------------|--------------------------------------|---------------|-----------|
| 0                                     | P 🚳 🔽                                     |                      | -                                    |               | Full View |
| Contact Card                          | Requirements                              | Related Properties ( | 2) Supplier h                        | tems          |           |
| Status: *                             | Active                                    | ×                    |                                      |               |           |
| Title:<br>Salutation:<br>First Name:  | Mr<br>Joe<br>Joseph                       | V                    | ome Phone:<br>/ork Phone:<br>lobile: | 02 9467 7354  |           |
| Last Name:<br>Email:<br>Residential A | Thomas<br>joe@hotm<br>Address:25 Keller S | ail.com C            | acsimile:<br>ompany: *               | Apex Printers |           |
| Suburb:                               | Killara<br>Save                           | S                    | tate:                                | NSW           | <u> </u>  |

#### **Contact Action Icons**

# Contact Action Icons

#### From Left to Right

- Email Send an email directly to the contact and view previously sent emails
- <u>SMS</u> 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)

- o <u>E-Newsletter</u> Send an e-newsletter directly to the contact
- Log Enquiry Log an enquiry made on a property by the contact
- <u>Match Properties</u> Match available properties suitable for the contact. Only appears if <u>requirements</u> 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.
- <u>Tasks & Activity Schedules</u> Apply a single task, activity schedule or view active and completed tasks against the contact.
- <u>Send a Letter</u> Send a letter directly to the contact, edit/create a letter template and access previously sent letters.

| :: Contact :              | Joseph Tho         | mas           |                            |               | • •       |
|---------------------------|--------------------|---------------|----------------------------|---------------|-----------|
| 0 .                       | P 2 6              |               |                            |               | Full View |
| Contact Card              | Requirements       | Related Prope | erties (2) Supplier It     | ems           |           |
| Status: *                 | Active             |               | 1                          |               |           |
| Title:<br>Salutation:     | Mr<br>Joë          |               | Home Phone:<br>Work Phone: | 02 9467 7354  |           |
| First Name:<br>Last Name: | Joseph<br>Thomas   |               | Mobile:<br>Facsimile:      |               |           |
| Email:                    | joe@hotm           | nail.com      | Company: *                 | Apex Printers |           |
| Residential A             | 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 <u>main</u> <u>contact panel.</u>

| Joseph Thomas           |
|-------------------------|
| < Back to Contacts      |
| > Notes History         |
| Communication History   |
| > Activity Schedules    |
| > Viewed Inspections(0) |
| Contact Modifications   |
| > Help Text             |

- O Notes History This section will display all saved notes relating to the contact
- <u>Communication History</u> 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.
- <u>Viewed Inspections</u> 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.

|  | :: Contact : J  | oseph Thomas        | -                 |             |               |           |
|--|-----------------|---------------------|-------------------|-------------|---------------|-----------|
| < Back to Contacts   |                 | B 🏫 🍙 🖪             |                   | 2           |               | Full View |
| > Notes History  | Contact Card    | tequirements Relati | ed Properties (2) | Supplier It | ems           |           |
| Communication History  | Status: *       | Active              | -                 |             |               |           |
| > Activity Schedules   | Contact 1 ::    | Lucine              | 100               |             |               |           |
| > Viewed Inspections(0)  | Title:          | Mr                  | - Ho              | me Phone:   | 1             |           |
| > Contact Modifications  | Salutation:     | Joe                 | VVc               | ork Phone:  | 02 9467 7354  |           |
| > Help Text  | First Name:     | Joseph              | Mo                | bile:       |               |           |
| a set of the set of th | Last Name:      | Thomas              | Fai               | csimile:    |               |           |
|  | Email:          | joe@hotmail.com     | Co                | mpany: *    | Apex Printers |           |
|  | Residential Add | ress: 25 Keller St  |                   |             |               |           |
|  | Suburb:         | Killara             | Sta               | ite:        | NSW           |           |
|  |                 | Teree.              |                   |             | -             | I7        |
|  |                 | Save                |                   |             |               |           |

# **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

|            | ill auto filter your results<br>much info you enter below. |
|------------|--|
| First Name |  |
| Last Name: |  |
| Company:   |  |
|            | Advanced Search  |

3. Click the green Upload button

| Import Upload         Import Continu           Import Options         Import Continu   | mport Uplo   | ad  |  |   |
|--|--|---|--|---|
| <ul> <li>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.</li> <li><b>Duplicate Contacts</b> 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 &amp; 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. 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). </li> <li><b>Contact Categories and Assigned Staff</b> 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 / assigned Staff &amp; 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</li></ul> | Import Upload  | Import Options  | Import Confirm   |   |
| <ul> <li>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 &amp; Last Name with Home/Work Phone or Address.</li> <li>Please select the appropriate action you'd like taken on the Import Options tab should any duplicate contacts be detected.</li> <li>Skip: This option will ignore all contacts from the CSV that are already existing contacts in the database.</li> <li>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.</li> <li>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).</li> </ul> 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, please split up your CSV files and repeat the process for each file. Please contact Agentox 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. In please take the time to review your CSV file before proceeding. Charges will apply for any bulk modifications required after import.   | Before attempting<br>before importing in<br>dropped the "0" in             | to import Contacts, plea<br>nto the database. If you  | bulk import your Conta   | cts and one of the fields is incorrect (for example your CSV file has   |
| <ul> <li>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.</li> <li>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).</li> <li>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 &amp; Subscriptions on the Import Options tab that are to be applied to ALL contacts in this import.</li> <li>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.</li> <li>Please take the time to review your CSV file before proceeding. Charges will apply for any bulk modifications required after import.</li> </ul>   | The system will c<br>number, or the con                                    | heck if any of the conta<br>nbination of First & Last   | Name with Home/Work I  | Phone or Address.   |
| This function is designed to import groups of contacts from the same category (contact class / custom class) and belonging to the same<br>staff member (assigned staff). Please select the Contact Class(es), Custom class(es), Assigned Staff & Subscriptions on the Import<br>Options tab that are to be applied to ALL contacts in this import.<br>WARNING: This function is not designed to handle large CSV files. This is due to the processing involved with duplicate checking<br>designed to ensure integrity of your contact data. The Maximum number of contacts (lines in CSV) able to be imported in one round is<br>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<br>Agentbox Support should you require a quote to bulk import contacts on a larger scale.<br>Please take the time to review your CSV file before proceeding. Charges will apply for any bulk modifications required after import.   | <ul> <li>Append Miss<br/>database, It wi</li> <li>Overwrite: Th</li> </ul> | ing Information: This<br>I not overwrite the exist<br>is option will overwrite                                  | s option will add any a<br>ting contact.<br>the existing contact in th | dditional information from the CSV file to the existing contact in the<br>e database with the values from the CSV file (excluding any fields that |
| designed to ensure integrity of your contact data. The Maximum number of contacts (lines in CSV) able to be imported in one round is<br>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<br>Agentbox Support should you require a quote to bulk import contacts on a larger scale.<br>Please take the time to review your CSV file before proceeding. Charges will apply for any bulk modifications required after import.<br>o file uploaded. Upload  | This function is de<br>staff member (as:                                   | signed to import groups<br>signed staff). Please se   | of contacts from the sa<br>elect the Contact Class(                    |   |
| o file uploaded. Upload  | designed to ensur<br>1,000. If you need                                    | e integrity of your cont<br>to import more than 1,0   | act data. The Maximum<br>00 contacts, please split                     | number of contacts (lines in CSV) able to be imported in one round is<br>up your CSV files and repeat the process for each file. Please contact   |
|  | Please take the tim  | e to review your CSV f  | ile before proceeding. C   | narges will apply for any bulk modifications required after import.   |
|  |  | the second se | rms and condition  | s for importing contacts.   |

4. Click Browse Files

| Import Uploa  | d  |  |          |
|---|--|--|----------|
| Import Upload   | Import Options   | import Conilinn  |          |
| before importing int<br>dropped the "0" in<br>situation later.<br>Duplicate Contact<br>The system will che<br>number, or the comt<br>Please select the ap<br>• Skip: This option<br>• Append Missii<br>database. It will<br>• Overwrite: This<br>were used to me<br>Contact Categorie<br>This function is des<br>staff member (assi<br>Options tab that are<br>WARNING: This fur<br>designed to ensure<br>1,000. If you need to<br>Agentbox Support s<br>Please take the time | o import Contacts, pleas<br>o the database. If you<br>front of mobile number<br>sek if any of the conta-<br>jonation of First & Last /<br>poropriate action you'd it<br>n will ignore all contacts<br>ng Information: This<br>not overwrite the exist<br>soption will overwrite the<br>action the contact or any<br>es and Assigned Stati<br>igned to import groups i<br>gned staff). Please sele<br>to be applied to ALL co-<br>nction is not designed<br>integrity of your conta<br>o import more than 1,00<br>should you require a que<br>to review your CSV fill | Click the 'Browse Files' button to go and select the file<br>select 'Upload' to confirm the files to publish.<br><b>Browse Files</b><br>Overall p<br>File Pro<br>Clear List<br>:: Selected Files ::- | progress |

5. Locate Photo located within computer files, click on the file then select Save

| Save in:      | 📙 Training File | s           | G 🖻 🖻 🖽 🕶        |                   |      |
|---------------|-----------------|-------------|------------------|-------------------|------|
| Pa            | Name            | *           | Date modified    | Туре              | Size |
| Recent Places | 🔊 Sample Co     | ontact Data | 18/04/2012 11:41 | Microsoft Excel C | 81   |
| Desktop       |                 |             |                  |                   |      |
| - caucop      |                 |             |                  |                   |      |
| Libraries     |                 |             |                  |                   |      |
| Libraries     |                 |             |                  |                   |      |
|               |                 |             |                  |                   |      |
| Libraries     | *               |             | III              |                   |      |

#### 6. Click the green Upload button

| and the second |
|----------------|
| 0%             |
|                |
| 0%             |
| 6              |
| Upload         |
|                |
|                |

7. Once uploaded, read and tick that you have read and agree to the terms and conditions for importing contacts and click next

| mport Upload  | Import Options  | Import Confirm                                     |  |
|---|---|--|--|
| before importing i  | to import Contacts, plea<br>nto the database. If you                              | bulk import your Conta                             | your CSV file is correct. The system does not format or alter the data<br>cts and one of the fields is incorrect (for example your CSV file has<br>1234" instead of "0432101234") then it will be difficult to rectify the                       |
| number, or the cor  | heck if any of the conta<br>mbination of First & Last                             | Name with Home/Work F                              | already contacts in the database - matching by email address, mobile<br>Phone or Address.<br>Options tab should any duplicate contacts be detected.  |
| <ul> <li>Append Miss<br/>database. It with</li> <li>Overwrite: The</li> </ul> | sing Information: This<br>Il not overwrite the exist<br>his option will overwrite | s option will add any a<br>ing contact.            | already existing contacts in the database.<br>dditional information from the CSV file to the existing contact in the<br>e database with the values from the CSV file (excluding any fields that<br>he CSV file).                                 |
| This function is de<br>staff member (as                                       |   | of contacts from the sa<br>lect the Contact Class( | me category (contact class / custom class) and belonging to the same<br>es), Custom class(es), Assigned Staff & Subscriptions on the Impor   |
| designed to ensur<br>1,000. If you need                                       | re integrity of your conta<br>to import more than 1,00                            | act data. The Maximum i                            | iles. This is due to the processing involved with duplicate checking<br>number of contacts (lines in CSV) able to be imported in one round is<br>up your CSV files and repeat the process for each file. Please contac<br>cts on a larger scale. |
| Please take the tim   | ne to review your CSV f   | ile before proceeding. Cl                          | narges will apply for any bulk modifications required after import.  |
| CSV Delete  |   |  |  |
|   |   | ed 18th Apr, 2012                                  |  |
| I have read a   | and agree to the te   | rms and condition                                  | s 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)

| Import Optio    | ons                |                            | 8 |
|-----------------|--------------------|----------------------------|---|
| Import Upload   | Import Options     | Import Confirm             |   |
| First Row Conta | ins Column Headi   | ngs: 💿 Yes 🔿 No            | * |
| Duplicate Conta | icts:              | Skip                       |   |
| First Name:     | acts Database Fiel | Append Missing Information |   |
| Last Name:      | Last Nam           |                            |   |

#### 10. Map the system fields with the fields in the spread sheet

| First Name:       | First name |   |  |
|-------------------|------------|---|--|
| Last Name:        | Last Name  |   |  |
| Title:            | Title      | - |  |
| Salutation:       |            | - |  |
| Email:            | Email      |   |  |
| Home Phone:       |            |   |  |
| Mobile:           | Mobile     |   |  |
| Work Phone:       | Work Phone |   |  |
| Facsimilie:       | 1          |   |  |
| Company:          | Company    | - |  |
| Job Title:        |            | - |  |
| Address:          | Address    |   |  |
| Suburb:           | Suburb     |   |  |
| State:            | State      |   |  |
| Postcode:         | Postcode   |   |  |
| Country:          |            |   |  |
| Notes:            | 1          | - |  |
| Postal Address:   |            |   |  |
| Postal Suburb:    |            |   |  |
| Postal State:     |            | - |  |
| Postal Postcode:  |            | - |  |
| Postal Country:   |            |   |  |
| Anniversary Date: | 1          |   |  |

11. Select the contact classes, custom classes, assigned staff and bulk subscribe the contacts and click next.

| Accountant  |  |
|---|--|
| Auctioneer  |  |
| Business  |  |
| Buyer   |  |
| Filter Custom Class   | •  |
| Please Select Your Custom Class and Click on 'Add'                | Aud  |
| Selected Custom Class:  |  |
| Add Custom  |  |
|   |  |
|   |  |
| Coffice Admin   | *  |
|   | =  |
|   | 1  |
| John Harris   | ÷  |
| Newsletters   |  |
|   |  |
|   |  |
|   |  |
|   | 7  |
| By selecting any of the above options you confirm you have obta   | ined explicit  |
| permission from the person to receive marketing material from the | in office  |
|   | Auctioneer Business Buyer Filter Custom Class Please Select Your Custom Class and Click on 'Add' Selected Custom Class: Add Custom |

12. Review and confirm the format the data will be imported and click Confirm

| irst Row Contains Column Headings: Yes<br>uplicate Contacts: Append Missing Information<br>.:: Map to Contacts Database Fields ::<br>First Name: First name<br>Last Name: Last Name<br>Title: Title<br>Salutation:<br>Email: Email<br>Home Phone:<br>Mobile: Mobile<br>Work Phone: Work Phone<br>Facsimilie:<br>Company: Company<br>Job Title:<br>Address: Address<br>Suburb: Suburb<br>State: State<br>Postcode: Postcode<br>Country:<br>Notes:<br>Postal Address:<br>Postal Address:<br>Postal State:<br>Postal Postcode:   | Import Conf     | irm            |                | 3           |
|--|-----------------|----------------|----------------|-------------|
| uplicate Contacts:       Append Missing Information         :: Map to Contacts Dase Fields ::  | Import Upload   | Import Options | Import Confirm |             |
| Last Name:       Last Name         Title:       Title         Salutation:       Email         Email:       Email         Home Phone:       Mobile         Mobile:       Mobile         Work Phone:       Work Phone         Facsimilie:       Company:         Company:       Company         Job Title:       Kate         Address:       Address         Suburb:       Suburb         State:       Ostcode         Postcode:       Postcode         Postal Address:       Postal Suburb:         Postal Suburb:       Fostal Suburb:         Postal Postcode:       Fostal Postcode:   | Duplicate Conta | icts:          | Append Miss    | Information |
| Title:TitleSalutation:EmailEmail:EmailHome Phone:MobileMobile:MobileWork Phone:Work PhoneFacsimilie:Company:Company:CompanyJob Title:Image: Company:Address:AddressSuburb:SuburbState:StatePostcode:PostcodePostal Address:Image: Company:Postal Suburb:Image: Company:Postal Suburb:Image: Company:Postal State:Image: Company:Postal State:Image: Company:Postal Postcode:Image: Company:Postcode:Image: Company:<   | Second second   |                |                |             |
| Salutation:     Email:     Emai   |                 |                | e              |             |
| Home Phone:       Mobile       Mobile       Image: Company:       Mobile       Image: Company:   | a second second |                |                |             |
| Mobile:       Mobile         Work Phone:       Work Phone         Facsimilie:       Company:         Company:       Company         Job Title:       Address         Address:       Address         Suburb:       Suburb         State:       State         Postcode:       Postcode         Country:       Vorkes:         Postal Address:       Postal State:         Postal State:       Postal State:         Postal State:       Postal State:         Postal Postcode:       Forstal State:         Postal State:       Forstal State:         Postal State:       Forstal State:         Postal Postcode:       Forstal State:  | Email:          | Email          |                |             |
| Work Phone:Work PhoneFacsimilie:-Company:CompanyJob Title:-Address:AddressSuburb:SuburbSuburb:SuburbState:StatePostcode:PostcodeCountry:-Notes:-Postal Address:-Postal State:-Postal State:-Postal State:-Postal Postcode:-Postal Postcode:-   | Home Phone:     |                |                |             |
| Facsimilie:       Company:   | Mobile:         | Mobile         |                | É           |
| Company:CompanyJob Title:Address:AddressSuburb:SuburbSuburb:SuburbState:StatePostcode:PostcodeCountry:-Notes:-Postal Address:-Postal Suburb:-Postal State:-Postal State:-Postal Postcode:-   | Work Phone:     | Work Pho       | ne             |             |
| Job Title:Address:AddressSuburb:SuburbState:StatePostcode:PostcodeCountry:Votes:Postal Address:Postal Suburb:Postal Suburb:Postal State:Postal State:Postcode:Postal Postcode:Votes  | Facsimilie:     |                |                |             |
| Address:AddressAddressSuburb:SuburbState:StatePostcode:PostcodeCountry:PostcodeNotes:Postal Address:Postal Address:Postal Suburb:Postal State:Postal State:Postal Postcode:Fostal Postcode:  | Company:        | Company        |                |             |
| Suburb:SuburbState:StatePostcode:PostcodeCountry:PostcodeNotes:-Postal Address:-Postal Suburb:-Postal State:-Postal Postcode:-   | Job Title:      |                |                |             |
| State:     State       Postcode:     Postcode       Country:     Image: Country:       Notes:     Image: Country:       Postal Address:     Image: Country:       Postal Address:     Image: Country:       Postal Suburb:     Image: Country:       Postal State:     Image: Country:       Postal Postcode:     Image: Country:  | Address:        | Address        |                |             |
| Postcode: Postcode   Country: Notes:   Notes: Postal Address:   Postal Suburb: Postal State:   Postal Postcode: Image: Complement of the second of the sec | Suburb:         | Suburb         |                |             |
| Country:<br>Notes:<br>Postal Address:<br>Postal Suburb:<br>Postal State:<br>Postal Postcode:   | State:          | State          |                |             |
| Notes:<br>Postal Address:<br>Postal Suburb:<br>Postal State:<br>Postal Postcode:   | Postcode:       | Postcode       |                |             |
| Postal Address:<br>Postal Suburb:<br>Postal State:<br>Postal Postcode:   | Country:        |                |                |             |
| Postal Suburb:<br>Postal State:<br>Postal Postcode:  | Notes:          |                |                |             |
| Postal State:<br>Postal Postcode:  | Postal Addres   | s:             |                |             |
| Postal Postcode:   | Postal Suburb   | 2              |                |             |
|  | Postal State:   |                |                |             |
| Postal Country   | Postal Postcor  | de:            |                |             |
| +  | Postal Country  | y:             |                |             |

#### 13. You will receive a summary of the contact import and you can also download a full report

| Import Conf   | 8                    |                                     |   |
|---|----------------------|-------------------------------------|---|
| Import Upload   | Import Options       | Import Confirm                      |   |
| Created Contacts<br>Existing Contacts<br>Ignored Contacts | s: 44 - Append Miss  | ing Information                     | - |
| CSV was imported  | d successfully, clic | k here to download the 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

| S Cont                                | tacts  |
|---------------------------------------|--|
| <ul> <li>Fast Find</li> </ul>         | ł  |
|                                       | l auto filter your results<br>much info you enter below. |
| First Name:<br>Last Name:<br>Company: |  |
| • Add a Co                            | Advanced Search  |

| :: Contact :     | Create              |              |                       |                      |                    | S 8  |
|------------------|---------------------|--------------|-----------------------|----------------------|--------------------|------|
| Step 1 of 2 - Co | omplete Contact In  | fo           |                       |                      |                    |      |
| Contact Card     | Requirements        |              |                       |                      |                    |      |
| -:: Contact 1 :  |                     |              |                       |                      |                    |      |
| Title:           |                     |              | Home Phone:           | 1                    | 1                  |      |
| Salutation:      |                     |              | Work Phone:           |                      |                    |      |
| First Name: *    |                     |              | Mobile:               |                      |                    | E    |
| Last Name: *     |                     | 1            | Facsimile:            |                      |                    |      |
| Email:           |                     |              | Company:              |                      |                    |      |
| Residential A    | ddress: Street No., | Street Name  |                       |                      |                    |      |
| Suburb:          |                     |              | State:                | NSW                  |                    |      |
| Postcode:        | -                   |              | Country:              | Australia            |                    |      |
| Postal Addre     | SS:                 | 🗖 * Che      | eck if postal address | s is different to re | esidential address |      |
| Contact Meth     | iod:                |              | Anniv Date:           | 0 0                  |                    |      |
| Contact Class:   | * Account           | ant          | 🗌 Past V              | /endor               |                    |      |
|                  | Auction             | eer          | Prospe                | ective Landlord      | E                  |      |
|                  | Busines             | s            |                       | ective Vendor        | -                  |      |
|                  | Buyer S             | olicitor     | Purcha                |                      |                    |      |
|                  |                     | tional Agent | Solicity              |                      |                    |      |
|                  |                     |              |                       |                      | Save & Proce       | ed » |
|                  |                     |              |                       |                      |                    |      |

- 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

| S Cont                                | tacts  |
|---------------------------------------|--|
| • Fast Find                           | 1  |
|                                       | l auto filter your results<br>much info you enter below. |
| First Name:<br>Last Name:<br>Company: |  |
| • Add a Co                            | Advanced Search  |

| :: Contact :     | Create              |              |                       |                      |                    | S 8  |
|------------------|---------------------|--------------|-----------------------|----------------------|--------------------|------|
| Step 1 of 2 - Co | omplete Contact In  | fo           |                       |                      |                    |      |
| Contact Card     | Requirements        |              |                       |                      |                    |      |
| -:: Contact 1 :  |                     |              |                       |                      |                    |      |
| Title:           |                     |              | Home Phone:           | 1                    | 1                  |      |
| Salutation:      |                     |              | Work Phone:           |                      |                    |      |
| First Name: *    |                     |              | Mobile:               |                      |                    | E    |
| Last Name: *     |                     | 1            | Facsimile:            |                      |                    |      |
| Email:           |                     |              | Company:              |                      |                    |      |
| Residential A    | ddress: Street No., | Street Name  |                       |                      |                    |      |
| Suburb:          |                     |              | State:                | NSW                  |                    |      |
| Postcode:        | -                   |              | Country:              | Australia            |                    |      |
| Postal Addre     | SS:                 | 🗖 * Che      | eck if postal address | s is different to re | esidential address |      |
| Contact Meth     | iod:                |              | Anniv Date:           | 0 0                  |                    |      |
| Contact Class:   | * Account           | ant          | 🗌 Past V              | /endor               |                    |      |
|                  | Auction             | eer          | Prospe                | ective Landlord      | E                  |      |
|                  | Busines             | s            |                       | ective Vendor        | -                  |      |
|                  | Buyer S             | olicitor     | Purcha                |                      |                    |      |
|                  |                     | tional Agent | Solicity              |                      |                    |      |
|                  |                     |              |                       |                      | Save & Proce       | ed » |
|                  |                     |              |                       |                      |                    |      |

- 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 <u>unless the contact class 'Business' is ticked</u>)
- \* 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

| • Fast Fine | d   |
|-------------|---|
|             | ll auto filter your results<br>much info you enter below. |
| First Name: | 4   |
| Last Name:  |   |
| Company:    |   |
|             | Advanced Search   |

| :: Contact :     | Create              |             |                       |                      |                 | 0       |
|------------------|---------------------|-------------|-----------------------|----------------------|-----------------|---------|
| Step 1 of 2 - Co | omplete Contact Inf | o           |                       |                      |                 |         |
| Contact Card     | Requirements        |             |                       |                      |                 |         |
| Contact 1 :      | -                   |             |                       | _                    |                 |         |
| Title:           |                     |             | Home Phone:           | 1                    |                 |         |
| Salutation:      |                     | 1           | Work Phone:           |                      |                 | 3 11    |
| First Name: *    |                     |             | Mobile:               |                      |                 | E       |
| Last Name: *     |                     | 1           | Facsimile:            |                      |                 |         |
| Email:           |                     |             | Company:              |                      |                 |         |
| Residential A    | ddress: Street No.  | Street Name |                       |                      |                 |         |
| Suburb:          |                     |             | State:                | NSW                  |                 |         |
| Postcode:        | -                   |             | Country:              | Australia            |                 | •       |
| Postal Addre     | \$5:                | 🖾 * Ch      | eck if postal address | s is different to re | esidential addr | ess     |
| Contact Meth     | iod:                |             | Anniv Date:           | 00                   |                 |         |
| Contact Class:   | * Account           | ant         | Past V                | /endor               |                 |         |
|                  | Auctione            | er          | Prospe                | ective Landlord      |                 | E       |
|                  | Business Buyer      | 3           | Prospe                | ective Vendor        |                 |         |
|                  | Buyer So            | olicitor    |                       |                      |                 |         |
|                  | Conjunct            |             | Solicity              | or                   |                 | 1 1     |
|                  |                     |             |                       |                      | Save & Pro      | oceed » |
|                  |                     |             | - Solicito            | or                   | Save & Pro      | oceed » |

- 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 : Ap   | ex Printing            |               |                       |                             | - 4       |
|-------------------|------------------------|---------------|-----------------------|-----------------------------|-----------|
| @                 |                        |               |                       |                             | Full View |
| Contact Card Re   | quirements S           | upplier Items |                       |                             |           |
| Status: *         | Active                 |               |                       |                             | *         |
| -:: Contact 1 ::  |                        |               |                       |                             |           |
| Title:            |                        | -             | Home Phone:           |                             |           |
| Salutation:       |                        |               | Work Phone:           | 02 9234 7654                | E         |
| First Name:       |                        |               | Mobile:               |                             |           |
| Last Name:        | 1                      |               | Facsimile:            |                             |           |
| Email:            | ap@printing.c          | com           | Company: *            | Apex Printing               |           |
| Residential Addre | ess: 243 Liverpool     | St            |                       |                             |           |
| Suburb:           |                        |               | State:                | NSW                         | -         |
| Postcode:         |                        |               | Country:              | Australia                   |           |
| Postal Address:   |                        | 🗆 * Che       | eck if postal address | is different to residential | address   |
| Contact Method:   | Work Phone             | •             | Anniv Date:           | 0 0                         |           |
|                   |                        |               |                       |                             |           |
| Add Related Conta | Add Relate             | d Property Se | tup Letter Head       |                             |           |
| Contact Class: *  |                        |               |                       |                             |           |
| Contact Class:    | Accountar<br>Auctionee |               | Past Ve               | endor<br>stive Landlord     |           |
|                   | Save                   |               |                       |                             |           |
|                   | 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 Printin       | g                |   |                                | 0         |
|------------------------------|--------------------|------------------|---|--------------------------------|-----------|
| @                            | P & C              | · 🛗 🖹 🛸          |   |                                | Full View |
| Contact Card                 | Requirements       | Supplier Items   |   |                                |           |
| Status: *                    | Active             | •                |   |                                | *         |
| -:: Contact 1 ::-            |                    |                  |   |                                |           |
| Title:                       |                    |                  | Home Phone:   | 1                              |           |
| Salutation:                  |                    |                  | Work Phone:   | 02 9234 7654                   | =         |
| First Name:                  |                    |                  | Mobile:   |                                |           |
| Last Name:                   |                    |                  | Facsimile:  |                                |           |
| Email:                       | ap@printin         | ig.com           | Company: *  | Apex Printing                  |           |
| Residential Ad               | Idress: 243 Liverp | ool St           |   |                                |           |
| Suburb:                      |                    |                  | State:  | NSW                            | •         |
| Postcode:                    |                    |                  | Country:  | Australia                      |           |
| Postal Address               | 5:                 | 🗖 * Ch           | eck if postal address   | is different to residential ad | dress     |
| Contact Metho                | d: Work Pho        | ne 💌             | Anniv Date:   | 0 0                            |           |
|                              |                    |                  |   |                                |           |
| Add Related C                | ontact Add Rela    | ated Property Se | etup Letter Head  |                                | _         |
| Contact Class: *             | Accour             | tant             | Past Ve   | ndat                           |           |
| Contraction of the second of | Auction            |                  | and the second se | tive Landlord                  | Ē •       |
|                              | Save               |                  |   |                                |           |
|                              |                    |                  |   |                                |           |

2. Click on the Supplier Items tab

| :: Contact :                           | : New Item   |                | • 9       |
|--|--------------|----------------|-----------|
| 0                                      | 🖗 🚳 🛛        |                | Full View |
| Contact Card                           | Requirements | Supplier Items |           |
| Item Name: *<br>Price: *<br>Comment: * | Save         |                |           |

3. Enter Item Name, Price & Item Comment/Description

| :: Contact :             | : New Item        |                      | •         |
|--------------------------|-------------------|----------------------|-----------|
| 0                        | P & 2             |                      | Full View |
| Contact Card             | Requirements      | Supplier Items       |           |
| Item Name: *<br>Price: * | A4 Window<br>3.40 |                      |           |
| Comment: *               | A4 Gloss          | White Paper - Colour |           |
|                          |                   |                      |           |
|                          |                   |                      |           |
|                          | Save              |                      |           |
|                          |                   |                      |           |
|                          |                   |                      |           |
|                          |                   |                      |           |
|                          |                   |                      |           |
| 1                        |                   |                      |           |

4. Click Save

| :: Contact :                | : New Item   |                      |                               |
|-----------------------------|--------------|----------------------|-------------------------------|
| @                           | 🖗 🚳 🛛        |                      | Full View                     |
| Contact Card                | Requirements | Supplier Items       |                               |
| Existing Item<br>Name: A4 W |              | 3.4 , Comment: A4 GI | oss White Paper - Colour Edit |
| Item Name: *                |              |                      |                               |
| Price: *                    |              |                      |                               |
| Comment: *                  | 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 : Ma   | ry May                   |                                 |                                | 0         |
|-------------------|--------------------------|---------------------------------|--------------------------------|-----------|
| 0 🖬 🖻 🖗           | S & B 🖬                  | E 😫                             |                                | Full View |
| Contact Card Re   | quirements Related Prop  | perties (1)                     |                                |           |
| Status: *         | Active                   | -                               |                                | 4         |
| 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 Addre | ess: 1 Miles Road        |                                 |                                |           |
| Suburb:           | Camperdown               | State:                          | NSW                            |           |
| Postcode:         | 2050                     | Country:                        | Australia                      |           |
| Postal Address:   |                          | * Check if postal address       | is different to residential ad | Idress    |
| Contact Method:   | Email                    | <ul> <li>Anniv Date:</li> </ul> | 0 0                            |           |
|                   |                          |                                 |                                |           |
| Add Related Conta | ICL Add Related Property | Setup Letter Head               |                                |           |
|                   |                          |                                 |                                |           |
|                   | Save                     |                                 |                                |           |
|                   |                          |                                 |                                |           |

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:*                     |  |
|  |  |
| 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:

| 🔍 ls this an ex                               | isting conta | ct or, |  |
|---|--------------|--------|--|
| Is this a nev                                 | contact      |        |  |
| First Name:                                   | -            |        |  |
| Last Name:                                    |              |        |  |
| Company:                                      | 10           |        |  |
| Email:  |              |        |  |
| Mobile:                                       |              |        |  |
| Home Ph:                                      |              |        |  |
| Work Ph:                                      |              |        |  |
| Related Contac<br>Defacto 💌<br>Primary Contac |              |        |  |
| Defacto 💌                                     |              |        |  |
|   |              |        |  |
| Save Cance                                    |              |        |  |

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  | * |
|--|---|
| <ul> <li>Is this an existing contact or,</li> <li>Is this a new contact</li> </ul> |   |
| Select Related Contact:*   |   |
| Matthew Warren   |   |
| Related Contact's Relationship:* Spouse  |   |
| Primary Contact's Relationship:*   |   |
| Save Cancel  |   |
|  |   |
|  |   |
|  |   |
|  |   |
|  |   |
|  |   |

#### 6. Click Save

| 7. | You can now view the Related | Contact on the main | Contact Card tab. | Click on their | name to open their |
|----|------------------------------|---------------------|-------------------|----------------|--------------------|
| co | ntact card.                  |                     |                   |                |                    |

| :: Contact : Mai  | ry May                      |                        |                                     | 08   |
|-------------------|-----------------------------|------------------------|-------------------------------------|------|
| @                 |                             |                        | Full V                              | /iew |
| Contact Card Rec  | puirements Related Prope    | rties ( <b>1</b> )     |                                     |      |
| Status: *         | Active                      | 1                      |                                     | ×    |
| 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 Addre | ss: 1 Miles Road            |                        | j                                   |      |
| Suburb:           | Camperdown                  | State:                 | NSW                                 |      |
| Postcode:         | 2050                        | Country:               | Australia                           |      |
| Postal Address:   | -*0                         | heck if postal address | is different to residential address |      |
| Contact Method:   | Email                       | Anniv Date:            | 0 0 0                               |      |
|                   |                             |                        |                                     |      |
| Add Related Conta | ct Add Related Property     | Setup Letter Head      |                                     |      |
| Matthew Warrer    | n (Spouse) Email: mw@bigpon | d.net Mobile: 0412 345 | 678                                 |      |
|                   | Save                        |                        |                                     |      |
|                   |                             |                        |                                     |      |

# Add Related Property

How to add a Related Property

1. Search for your Contact and open their Contact Card

| :: Contact : Mai   | ry May  |                        |                                     | 0 8      |
|--------------------|---|------------------------|-------------------------------------|----------|
| 0                  | s o 🛛 🖬 🛛   |                        | F                                   | ull View |
| Contact Card Red   | quirements  |                        |                                     |          |
| Status: *          | Active  |                        |                                     | *        |
| Contact 1 ::       | a sum a s |                        |                                     |          |
| Title:             | Miss  | Home Phone:            | 02 9209 4174                        |          |
| Salutation:        |   | Work Phone:            | 02 9523 5642                        | 1        |
| First Name: *      | Mary  | Mobile:                | 0411 222 555                        |          |
| Last Name: *       | May   | Facsimile:             | 02 9209 4175                        | 1        |
| Email:             | mm@hotmail.com  | Company:               |                                     |          |
| Residential Addres | ss: 1 Miles Road  |                        |                                     | 1        |
| Suburb:            | Camperdown  | State:                 | NSW                                 | 1        |
| Postcode:          | 2050  | Country:               | Australia                           | 1        |
| Postal Address:    | <b>□</b> *C   | heck if postal address | is different to residential address | s.       |
| Contact Method:    | Email   | Anniv Date:            | 0 0 0                               |          |
|                    |   |                        |                                     |          |
| Add Related Conta  | ct Add Related Property   | Setup Letter Head      |                                     |          |
| 1.                 |   |                        |                                     |          |
|                    | Save  |                        |                                     |          |
|                    |   |                        |                                     |          |

2. On the Contact Card tab click the green Add Related Property button

| y   | Add Related Prope          |
|-----|----------------------------|
|     | Select Property:*          |
| ime | Enter listing ID or Suburt |
| •   | 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 Relate    | d Property    | /             |  |
|---------------|---------------|---------------|--|
| Select Proper | ty:*          |               |  |
| 14 Mars Lane  | 1             |               |  |
| ID #1P0006    | - 14 Mars Lan | e, Kensington |  |
| Accountant    |               |               |  |
| Save          | el            |               |  |

3. Select a Role from the Role drop down menu.

| elect Property;*<br>D #1P0006 - 14 Mars Lane |              |
|--|--------------|
| D #1P0006 - 14 Mars Lane                     | 1111 111111  |
|  | . Kensinator |
|  | 1            |
| tole:  |              |
| 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                                       |              |

4. Click save to add the related property

| elect Property:*  |                    |
|-------------------|--------------------|
| D #1P0006 - 14 Ma | rs Lane, Kensingto |
| ole:              |                    |
| Vendor            |                    |

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.

| \$ \$ <b>2 11</b>         | ]  | Full   | l View   |
|---------------------------|--|--|--|
| pirements Related Propert | ies (1)  |  |  |
| Active                    |  |  | 4  |
|                           |  |  | -  |
| Miss                      | Home Phone:  | 02 9209 4174   | -  |
|                           | Work Phone:  | 02 9523 5642   |  |
| Mary                      | Mobile:  | 0411 222 555   |  |
| May                       | Facsimile:   | 02 9209 4175   |  |
| mm@hotmail.com            | Company:   |  |  |
| s: 1 Miles Road           |  | 1  |  |
| Camperdown                | State:   | NSW  |  |
| 2050                      | Country:   | Australia  |  |
| 🗖 * Ch                    | eck if postal address i  | s different to residential address   |  |
| Email                     | Anniv Date:  | 0 0 .  |  |
|                           |  |  |  |
| t Add Related Property Si | etup Letter Head   |  |  |
|                           |  |  |  |
| Save                      |  |  |  |
|                           | Active Active Active Miss Miss Mary Mary May mm@hotmail.com Add Related Property Add Related Property St | Active       Image: Second secon | Active   Miss   Miss   Miss   Work Phone:   02 9209 4174   Work Phone:   02 9523 5642   Mary   Mobile:   0411 222 555   May   Facsimile:   02 9209 4175   mm@hotmail.com   Company:   1 Miles Road   Camperdown   State:   NSW   2050   Country:   Australia   * Check if postal address is different to residential address   Email   Anniv Date:   0   0   Setup Letter Head |

### 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 Card Requirements Status: * Contact 1 :: Title: Miss | Related Properti | es ( <b>2</b> )         |                                  | Full View |
|--|------------------|-------------------------|----------------------------------|-----------|
| Status: * Active   |                  | es ( <b>2</b> )         |                                  |           |
| Contact 1 ::   |                  |                         |                                  |           |
| Title  |                  |                         |                                  |           |
| IVIISS   |                  | Home Phone:             | 02 9209 4174                     | 1         |
| Salutation:  |                  | Work Phone:             | 02 9523 5642                     |           |
| First Name: * Mary   |                  | Mobile:                 | 0411 222 555                     |           |
| Last Name: * Smith   |                  | Facsimile:              | 02 9209 4175                     |           |
| Email: mm@hotma  | ail.com          | Company:                |                                  |           |
| Residential Address: 1 Miles Roa                             | d                |                         |                                  |           |
| Suburb: Camperdow  | 'n               | State:                  | NSW                              | •         |
| Postcode: 2050   | ]                | Country:                | Australia                        | •         |
| Postal Address:  | 🔲 * Che          | eck if postal address i | s different to residential addre | ess       |
| Contact Method: Email  |                  | Anniv Date:             | 0 0                              |           |

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)

| Select Letter Head:* default 💌                         |  |
|--|--|
|  |  |
| Miss Mary Smith<br>1 Miles Road<br>Camperdown NSW 2050 |  |
| Save   |  |

4. To customise the address further select Custom from the Select Letter Head:\* dropdown

| Setup Letter H   | ead               |
|--|-------------------|
| Select Letter Head:<br>Miss Mary Smith<br>1 Miles Road<br>Camperdown NSW 2 | default<br>custom |
| Save Cancel  |                   |

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.

| etup Letter Head  |  |
|---|--|
| Select Letter Head:* custom 💌                                 |  |
| Mr John and Mary Smith<br>1 Miles Road<br>Camperdown NSW 2050 |  |
| Save Cancel   |  |

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
- O Through the Universal Search Bar
- O 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

| S Cont      | tacts  |
|-------------|--|
| • Fast Find | t (1 found)  |
|             | l auto filter your results<br>much info you enter below. |
| First Name: | Mary   |
| Last Name:  | May  |
| Company:    |  |
|             | Advanced Search  |
| • Add a Co  | ontact   |

3. Click on your Contact from the Fast Find Results panel

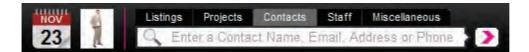
| S Contacts   | ✓ Fast Find Results             |
|--|---------------------------------|
| <ul> <li>Fast Find (1 found)</li> </ul>  | Mary May 2255                   |
| The system will auto filter your results based on how much info you enter below. | 1 Miles Road<br>Camperdown, NSW |
| First Name: Mary Last Name: May Company: Advanced Search                         |                                 |
| <ul> <li>Add a Contact</li> </ul>  |                                 |
|  |                                 |

4. Your Contact Card will appear

| :: Contact : Mai   | ry May                  |                         |                                     | 0    |
|--------------------|-------------------------|-------------------------|-------------------------------------|------|
| @ 🖬 🖻 🗭            | \$ \$ <b>[</b>          |                         | Full                                | View |
| Contact Card Rec   | nirements               |                         |                                     |      |
| Status: *          | Active                  |                         |                                     | *    |
| -:: Contact 1 ::   |                         |                         |                                     | -1   |
| Title:             | Miss                    | Home Phone:             | 02 9209 4174                        | E    |
| 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 Addres | ss: 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 Conta  | ct 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

| NOV | Listings | Projects  | Contacts | Staff | Miscellaneous | -        |
|-----|----------|-----------|----------|-------|---------------|----------|
| 24  | Q Ma     | ry        | 1        | -     |               | >>       |
|     | Mary M   | ay        |          |       | mm@hot        | mail.com |
|     | Add Nev  | W Contact | (        |       |               |          |
| NOV | Listings | Projects  | Contacts | Staff | Miscellaneous |          |
| 24  | Q mm     | 1@        |          |       |               |          |
|     | Mary Ma  | ay        |          |       | mm@hot        | mail.com |
|     | Add Nev  | V Contact |          |       |               |          |

4. Click on the Contact Name or email address

#### 5. Contact Card will appear on screen

| Contact Card   Requirements   Status: *   Active   :: Contact 1 ::   Title:   Miss   Home Phone:   02 5 | Full View                 |
|---|---------------------------|
| Status: * Active  | 209 4174                  |
| -:: Contact 1 ::  | 209 4174                  |
|   | 209 4174                  |
| Title: Miss Home Phone: 02.9  | 3209 4174                 |
|   |                           |
| Salutation: Work Phone: 02.9  | 9523 5642                 |
| First Name: * Mary Mobile: 041  | 1 222 555                 |
| Last Name: * May Facsimile: 02.9  | 9209 4175                 |
| Email: mm@hotmail.com Company:  |                           |
| Residential Address: 1 Miles Road   |                           |
| Suburb: Camperdown State: NS  | W                         |
| Postcode: 2050 Country: Aus   | stralia                   |
| Postal Address:   | nt to residential address |
| Contact Method: Email Anniv Date: 0   |                           |
|   |                           |
| Add Related Contact Add Related Property Setup Letter Head  |                           |
|   |                           |
| Save  |                           |

#### Advanced Contact Search

1. Please follow the steps under the <u>Advanced Contact Search</u> 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

| S Contacts   | :: Advanced Contact Search : New Search   | 4              |
|--|---|----------------|
| • Fast Find  | New Search  | Saved Searches |
| The system will auto filter your results         based on how much info you enter below.         First Name:         Last Name:         Company:         Advanced Search | :: Contact Search ::         First Name:         Last Name:         Home Phone:         Mobile:         Email:         Company:         Address:         Suburb:         Custom Filters:         eont         No filters created yet. |                |
| • Add a Contact  | Subscribe To: Auction Reminders<br>Newsletters<br>OFI Times<br>Property Updates   | ×<br>=<br>+    |
|  | Sale/Rental:  | ].             |

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

| New Search                   | Search Results | Refine Search    |                |              |
|------------------------------|----------------|------------------|----------------|--------------|
| Sort By: Contact Name: A-Z 🔹 |                |                  |                |              |
| Contact                      |                | Assigned Staff   | Last Contacted | Contact Info |
| Apex Printing                |                | Joe Franks(more) |                | R            |
| Gary Brown                   |                | John Smith       |                | 000          |
| Michael Johns                | on             | John Smith       |                | Q III        |
| Sam Jones                    |                | John Smith       |                | 002          |
| Samantha Jon                 | es             | John Smith       | 10/11/11       | @ []         |
| Mary May                     |                | John Smith       | 19/08/11       | 000          |
| Hayley Rees                  |                | John Smith       | 10/11/11       | Mar Z        |
| Charles Robert               | ts             | John Smith       |                | @ 12         |
| Jane Smith                   |                | John Smith       |                |              |
| Thomas Train                 |                | John Smith       | 26/10/11       | e mi         |

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).

| New Search Search Recults                                 | Refine Search  |                   | Saved Searches |   |
|---|----------------|-------------------|----------------|---|
| Sort By: Contact Last Name: A-Z                           | 1121»          | >                 |                |   |
| Contact Contact Last Name: Z A<br>Contact First Name: A-Z | Assigned Staff | Last Contacted    | Contact Info   |   |
| Apex Prir Contact First Name: Z-A                         | Jane Smith     |                   |                |   |
| Ozlemx / Contact Email                                    | Office Admin   |                   | R.C.           |   |
| James Barnett   | Jane Smith     |                   |                |   |
| Stewart Berry   | Jane Smith     |                   | 120 1          |   |
| Jack Black  | Jane Smith     |                   | 120            |   |
| Belinda Brennan   | Jane Smith     |                   |                | 1 |
| Brod Brennan  | Jane Smith     | 15/03/12 (dprint) |                |   |
| Pat Brennan   | Jane Smith     |                   | 120 1          |   |
| Gary Brown  | Jane Smith     |                   | 120            |   |
| Julia Burn  | Jane Smith     | 14/02/12 (letter) |                |   |
| Nick Citizen  | Jane Smith     |                   | 120            |   |

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 Co  | ontact Search : New Search  |                | 6  |
|---|---|----------------|----|
| New Search  |   | Saved Searches |    |
| -:: Contact Search  | 1) <del>.</del>   |                | 13 |
| First Name:<br>Home Phone:<br>Email:<br>Address:<br>Custom Filters: | Last Name: Last Name: Mobile: Company: Suburb: Cont No filters created yet. |                |    |
| Subscribe To:   | Auction Reminders  Newsletters OFI Times  Property Updates  Scles Depute    | *              |    |
| ←:: Group Search :<br>Sale/Rental:                                  | Search  |                | ], |

3. In the Save Search field enter your Search name

| :: Advanced Cor    | ntact Search : New Sea   | irch           |   |    |            |           |   |
|--------------------|--|----------------|---|----|------------|-----------|---|
| New Search         |  |                |   | Sa | aved Searc | hes       |   |
| Assigned Stan:     | Office Admin     Joe Franks     John Smith     Jane Thomas     Molonic Thempices |                |   |    |            | - III - F |   |
| Property Related?: |  |                |   |    |            |           |   |
| Contact Source:    | Auto Email<br>Email Enquiry<br>Import<br>Open Homes Inspection                   |                | _ |    |            | * III *   |   |
| Created From:      | 0 0 0  | Created To:    | 0 | 0  |            |           |   |
| Modified From:     | 0 0 0  | Modified To:   | 0 | 0  |            |           | 1 |
| Anniv Date From:   |  | Anniv Date To: | 0 | 0  |            |           | - |
| Save Search?:      | Newsletter Subscribers   |                |   |    |            |           |   |

4. Click on Search

| New Search     | Newsletter Subscribers | Refine Search  | Saved Searches |              |
|----------------|------------------------|----------------|----------------|--------------|
| Sort By: Conta | act Name: A-Z          |                | 2              |              |
| Contact        |                        | Assigned Staff | Last Contacted | Contact Info |
| Jack Black     |                        | John Smith     |                | 07           |
| Gary Brown     |                        | John Smith     |                | QMZ          |
| Michael Johnso | n ,                    | John Smith     |                |              |
| Sam Jones      |                        | John Smith     |                | e Mar        |
| Samantha Jone  | 26.                    | John Smith     | 10/11/11       | QUI          |
| Mary May       |                        | John Smith     | 19/08/11       | 0 III        |
| Charles Robert | s                      | John Smith     |                | 012          |

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

| S Contacts   | :: Advanced Contact Search : New Search  |                |  |  |  |  |  |
|--|--|----------------|--|--|--|--|--|
| <ul> <li>Fast Find</li> </ul>  | New Search   | Saved Searches |  |  |  |  |  |
| The system will auto filter your results<br>based on how much info you enter below.<br>First Name: | :: Contact Search ::         First Name:         Home Phone:         Email:         Company:         Address:         Suburb:         Custom Filters:         edit         No filters created yet. |                |  |  |  |  |  |
| • Add a Contact  | Subscribe To:  | × = = +        |  |  |  |  |  |
|  | Search   | -              |  |  |  |  |  |

3. Click on the Saved Searches drop down and select your search

| :: Advanced Co  | ntact Search : New Search  | ¢                      |
|---|--|------------------------|
| New Search  |  | Saved Searches         |
| Contact Search  |  | Newsletter Subscribers |
| First Name:<br>Home Phone:<br>Email:<br>Address:<br>Custom Filters: | Last Name:<br>Mobile:<br>Company:<br>Suburb:   |                        |
| Subscribe To:   | Auction Reminders Auction Reminders Newsletters OFI Times Property Updates Selec Results | *                      |
| Sale/Rental:  | Search   | ].                     |

#### 4. Your Target List will appear on screen

|                              | Newsletter Subscribers | Refine Search  | Saved Searches |              |
|------------------------------|------------------------|----------------|----------------|--------------|
| Sort By: Contact Name: A-Z 🔹 |                        |                |                |              |
| Contact                      | P                      | Assigned Staff | Last Contacted | Contact Info |
| Jack Black                   | ل                      | ohn Smith      |                | 012          |
| Gary Brown                   | L.                     | ohn Smith      |                | @ MER        |
| Michael Johnson              | L                      | ohn Smith      | 2 3            | 007          |
| Sam Jones                    | J                      | ohn Smith      |                | Q MAIZ       |
| Samantha Jones               | J                      | ohn Smith      | 10/11/11       | @ HIZ        |
| Mary May                     | Ŀ                      | ohn Smith      | 19/08/11       | @ MAIZ       |
| Charles Roberts              | J                      | ohn Smith      |                | 012          |

# How do I edit a saved contact search?

1. Open one of your saved searches.

| New Search     | Newsletter Subscribers | Refine Search  | Saved Searches |              |
|----------------|------------------------|----------------|----------------|--------------|
| Sort By: Conta | act Name: A-Z 💌        |                | 2              |              |
| Contact        |                        | Assigned Staff | Last Contacted | Contact Info |
| Jack Black     |                        | John Smith     |                | @ 12         |
| Gary Brown     |                        | John Smith     |                | QUZ          |
| Michael Johns  | on                     | John Smith     |                | 007          |
| Sam Jones      |                        | John Smith     |                | 011          |
| Samantha Jon   | es .                   | John Smith     | 10/11/11       | Q HIZ        |
| Mary May       |                        | John Smith     | 19/08/11       | 011          |
| Charles Robert | ts                     | John Smith     |                | 012          |

2. Click on the Refine Search tab

| :: Advance   | d Contact Search : N   | Newsletter Subscriber          | S              |
|--------------|------------------------|--------------------------------|----------------|
| New Search   | Newsletter Subscribers | Refine Search                  | Saved Searches |
|              | 7 ге                   | ecord(s) found from last searc | ch.            |
|              |                        | Remove Saved Search            |                |
| Contact Se   | earch ::               |                                |                |
| First Name:  |                        | Last Name:                     |                |
| Home Phon    | e:                     | Mobile:                        |                |
| Email:       |                        | Company:                       |                |
| Address:     |                        | Suburb:                        |                |
| Custom Filte | ers: eat No filters o  | created yet.                   |                |
| Subscribe T  | o: Auction Remind      | lers                           | _              |
|              | OFI Times              |                                | =              |
|              | Property Update        | es                             | +              |
| -            | U Salaa Uaaulta        |                                |                |

- 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.

| New Search     | Newsletter Subscribers | Refine Search  | Saved          | Searches     |
|----------------|------------------------|----------------|----------------|--------------|
| Sort By: Conta | act Name: A-Z          |                | 2              |              |
| Contact        |                        | Assigned Staff | Last Contacted | Contact Info |
| Jack Black     |                        | John Smith     |                | 012          |
| Gary Brown     |                        | John Smith     |                | 0 CI         |
| Michael Johns  | on .                   | John Smith     |                | 007          |
| Sam Jones      |                        | John Smith     |                | 0112         |
| Samantha Jon   | es                     | John Smith     | 10/11/11       | QUI          |
| Mary May       |                        | John Smith     | 19/08/11       | @ III Z      |
| Charles Robert | ts .                   | John Smith     |                | 012          |

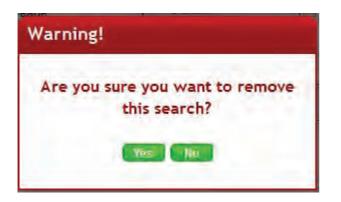
2. Click on the Refine Search tab.

| New Search     | Newsletter Subscribers   | Refine Search                  | Saved Searches |
|----------------|--|--------------------------------|----------------|
|                | 7 re   | ecord(s) found from last searc | ch.            |
|                |  | Remove Saved Search            |                |
| -:: Contact Se | earch ::   |                                |                |
| First Name:    |  | Last Name:                     |                |
| Home Phone     | e:   | Mobile:                        |                |
| Email:         |  | Company:                       |                |
| Address:       |  | Suburb:                        |                |
| Custom Filte   | ers: eon No filters o  | reated yet.                    |                |
| Subscribe T    | o: Auction Remind<br>Newsletters<br>OFI Times<br>Property Update |                                | *              |

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 <u>Advanced Contact Search</u> to open your target list of contacts
- 2. Click on the print icon at the top of the search results

| <ul> <li>Fast Find</li> </ul>   | New Search Search Results       | Refine Search   |                   |              |
|---|---------------------------------|-----------------|-------------------|--------------|
| The system will auto filter your results<br>based on how much info you enter below. | Sort By: Contact Last Name: A-Z | ■ 1 2 »         |                   |              |
| First Name:   | Contact                         | Assigned Staff  | Last Contacted    | Contact Info |
| Last Name:  | Apex Printing                   | Jane Smith      |                   |              |
| Company:  | Gary Brown                      | Jane Smith      |                   |              |
| Advanced Search   | Jennifer Brown                  | Jane Smith      |                   |              |
| Add a Contact   | Julia Burn                      | Jane Smith      | 14/02/12 (letter) |              |
| Import CSV  | Nick Citizen                    | Jane Smith      |                   | 120          |
| mportoot  | Harry Crane                     | Jane Smith      | 1                 | 120 14       |
|   | Colin Fairlight                 | Marcus Thompson |                   |              |
|   | Kim French                      | Jane Smith      |                   | 120          |
|   | Kate Green                      | Jane Smith      |                   | 120          |
|   | Maria Hook                      | Jane Smith      |                   | 120 14       |
|   | Max Hook                        | Jane Smith      |                   |              |

3. 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.

| Detailed Con    | 12  |   |                  |  |  |       |   | tact report<br>y for printi   |
|-----------------|---|---|------------------|--|--|-------|---|---|
| Name            | Details   | Contact.  | Related Contacts | Related Properties   | Requirements   | Notes | 2 | Becore Detaile  |
|                 | Status: Active, Business<br>Company:<br>Apex Printing<br>Contact Classes:<br>Supplier; Business   | (M): 02 9234 7954<br>[K]: ap@pinting.com<br>[Address]: 243 Liverpool 57, Australia<br>[Postal]: Australia                                 |                  |  |  |       |   | Anny-od Statt Jane Con<br>First Created:<br>01 Dec 2011<br>Last Modified:<br>01 Dec 2011  |
| Mr. Gary likown | Status: Adve, Person<br>Contact Classes:<br>Buyer, Vindor, Purchaser                              | (M): 5465 231 528<br>(B): ganj orovni (B)notmali com<br>(Adarens): 17 Transve Street, Gostoro,<br>Anstalia): Azato<br>(Postel): Australia |                  | Measure an Product, - Level 4, Liver 1412 Monton Stayed,<br>Company<br>(Linter) (2000)<br>Linter (2000) (2000) (2000)<br>Bayese et PP0002 (130)<br>Electronic 2001 (100)<br>Linter) (2001 (100))<br>Linter) (2001 (100))<br>Li | For Sale: Residential (Arresor,<br>Apatheni, Illoci of Units, House,<br>Land SemiDuple, Dudit, House,<br>Townhouse, Unit, Vala)<br>Suburb, Surry Hills |       |   | Assigned Staff: Jane Smit<br>First Created:<br>26 Oct 2011<br>Last Modified:<br>16 Apr 2012   |
| Jennifer Brown  | Status: Active, Person<br>Contact Classes:<br>Buyer   | (M): 0456 222 565<br>IE3: Johown@adentoox.com.au  |                  |  | For Sate: Residential (House)<br>Suburb: Copacabana<br>Price 51,080,000 - \$1,320,000<br>Bed; 3+1 Bath; 4+1 Park; 2+                                   |       |   | Assigned Staff; Jane Smit<br>Hinst Created:<br>05 Nov 2011<br>Last Modified:<br>12 Apr 2012   |
| Julia fiorn     | Status: Adivi, Person<br>Company:<br>J.b. Lawyers<br>Contact Classes:<br>Soluctor: Buyer Soluctor | imi sado dob 123<br>proje oz viso dob<br>IRE jeligemai com<br>Kolories 2: 2 Pio St. System, Australia,<br>2000<br>(Postal): Australia     |                  | Buyer Solicion: #10003-52 Blacen Ideas Surry<br>(Biotangel 2017-10-20)<br>(Listig Agent Jule Simon, Agenatal Agent Jane<br>Simon, Selling Agent Jane Simon,<br>Buyer Solicion: #196001 - 1 Jone Simon<br>Cooperationa Ideas (Branch<br>Cooperationa Ideas)<br>(Listing Agent Jane Simon, Selling Agent Jane Simon,   |  |       |   | Assigned Staff: Jace Smit<br>First Created:<br>91 Dec 2011<br>Last Modified:<br>01 Dec 2011<br>Last Contacted:<br>14/02/12 (letter) |

## Subscribe Contacts

How to Subscribe Contacts to E-Newsletters?

1. Search for your Contact and open their Contact Card

| :: Contact : Mar   | ry May                  |                         |                               | 0         |
|--------------------|-------------------------|-------------------------|-------------------------------|-----------|
| @                  | \$ \$ <b>[</b>          | E 🚔                     |                               | Full View |
| Contact Card Reg   | nuirements              |                         |                               |           |
| Status: *          | Active                  | 3                       |                               | *         |
| 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 Addres | ss: 1 Miles Road        |                         | ~                             |           |
| Suburb:            | Camperdown              | State:                  | NSW                           |           |
| Postcode:          | 2050                    | Country:                | Australia                     |           |
| Postal Address:    |                         | Check if postal address | is different to residential a | address   |
| Contact Method:    | Email                   | Anniv Date:             | 0 0                           |           |
|                    |                         |                         |                               |           |
| Add Related Conta  | ct Add Related Property | Setup Letter Head       |                               |           |
| J.                 |                         |                         |                               |           |
|                    | 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 <u>Advanced contact search</u> 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 <u>Advanced contact search</u> for subscribers, then <u>generate and send an e-newsletter</u>

\*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.

| :: Contact : Ma  | iry May   |           |
|------------------|---|-----------|
|                  |   | Full View |
| Contact Card Re  | quirements  |           |
| Contact Comments | Has 3 kids, looking for a larger home.  |           |
| Subscribe To:    | Newsletters       Auction Reminders         Property Updates       Sales Results         OFI Times       Sales results         By selecting any of the above options you confirm you have obta permission from the person to receive marketing material from the save |           |

#### 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 : Mai   | ry May                  |                         |                                    | 00        |
|--------------------|-------------------------|-------------------------|------------------------------------|-----------|
| @                  | \$ \$ <b>2</b>          | E 🖄                     |                                    | Full View |
| Contact Card Red   | property Related Prop   | nerties (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: *       | Мау                     | Facsimile:              | 02 9209 4175                       |           |
| Email:             | mm@hotmail.com          | Company:                |                                    |           |
| Residential Addres | ss: 1 Miles Road        |                         |                                    |           |
| Suburb:            | Camperdown              | State:                  | NSW                                | -         |
| Postcode:          | 2050                    | Country:                | Australia                          | -         |
| Postal Address:    |                         | Check if postal address | is different to residential addres | ss        |
| Contact Method:    | Email                   | Anniv Date:             | 0 0                                |           |
|                    |                         |                         |                                    |           |
| Add Related Conta  | ct Add Related Property | Setup Letter Head       |                                    |           |
|                    |                         |                         |                                    |           |
|                    | Save                    |                         |                                    |           |
|                    |                         |                         |                                    |           |

2. Click on the Requirements tab

| :: Contact : Mar    | y May : New Requirement          | • •       |
|---------------------|----------------------------------|-----------|
| @                   |                                  | Full View |
| Contact Card Req    | uirements Related Properties (1) |           |
| Sale/Rental:        | For Sale                         | ×.        |
| Туре:               | Residential                      |           |
| Category: *         | Acreage                          |           |
| Price From:         | To:                              | E         |
| Bedrooms From:      | To:                              |           |
| Bathrooms From:     | To:                              |           |
| Parking From:       | To:                              |           |
| State:              | NSW                              |           |
| Select a Suburb(s): | Adm                              |           |
| 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   | y May                            | 00        |
|---------------------|----------------------------------|-----------|
| @                   | s s 🛛 🖬 🗄 🖻                      | Full View |
| Contact Card Requ   | uirements Related Properties (1) |           |
| Sale/Rental:        | For Sale                         | 1         |
| Туре:               | Residential                      |           |
| Category: *         | Acreage                          |           |
| Price From:         | To: 1400000                      | Ę.        |
| Bedrooms From:      | 3 To:                            |           |
| Bathrooms From:     | 1 To:                            |           |
| Parking From:       | 1 To:                            |           |
| State:              | NSW                              |           |
| Select a Suburb(s): | Adn                              |           |
| 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

| 🥵 Mary May  | :: Contact : Ma  | ry May  |  |                               | . 🗎 🙆     |
|---|--|---|--|-------------------------------|-----------|
| < Back to Contacts  | @ 🖬 🖻 🖗  |   |  |                               | Full View |
| <ul> <li>&gt; Notes History</li> <li>&gt; Communication History</li> <li>&gt; Activity Schedules</li> </ul> |  |   | operties (2)   |                               |           |
| > Viewed Inspections(1)   | Title:   | Miss  | Home Phone:  | 02 9209 4174                  |           |
| > Contact Modifications   | Salutation:  |   | Work Phone:  | 02 9523 5642                  | E         |
| > Help Text   | First Name: *  | Mary  | Mobile:  | 0411 222 555                  |           |
|   | Last Name: *   | May   | Facsimile:   | 02 9209 4175                  |           |
|   | Email:   | mm@hotmail.com  | Company:   |                               |           |
|   | Residential Addre                                      | ess: 1 Miles Road                                     |  |                               |           |
|   | Suburb:  | Camperdown  | State:   | NSW                           |           |
|   | Postcode:  | 2050  | Country:   | Australia                     |           |
|   | Postal Address:  | E   | * Check if postal address                                  | is different to residential a | address   |
|   | Contact Method:  | Email   | <ul> <li>Anniv Date:</li> </ul>                            | 0 0                           |           |
|   | Add Related Conta<br>Matthew Warre<br>Contact Class: * | act Add Related Property<br>In (Spouse) Email: mw@big | Setup Letter Head<br>gpond.net Mobile: 0412 345<br>Past Ve |                               |           |

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.

| S Mar                                       | y May   | :: Contact : Ma   | ry May                    |                                 |                             | • 8       |
|---|---|-------------------|---------------------------|---------------------------------|-----------------------------|-----------|
| < Back to                                   | Contacts  | @ 🖬 🖻 🗭           |                           |                                 |                             | Full View |
| > Notes H                                   | istory  | Contact Card Red  | guirements Related Prop   | perties (2)                     |                             |           |
| > Commu                                     | nication History  | Status: *         | Active                    | ন<br>ন                          |                             |           |
| > Activity                                  | Schedules   | -:: Contact 1 ::  | [Active                   | -                               |                             | <u></u>   |
| ✓ Viewed                                    | Inspections(1)  | Title:            | Miss                      | Home Phone:                     | 02 9209 4174                |           |
| Viewed                                      | Property  | Salutation:       |                           | Work Phone:                     | 02 9523 5642                | E         |
| 07/11/2011                                  | 1 Jones Street, Copacabana, NSW *                                       | First Name: *     | Mary                      | Mobile:                         | 0411 222 555                |           |
| Mary wanted a second look at the house with |   | Last Name: *      | May                       | Facsimile:                      | 02 9209 4175                |           |
|   | d after the open house on the 5th.<br>love the property however need to | Email:            | mm@hotmail.com            | Company:                        |                             |           |
| check finar                                 |   | Residential Addre | ss: 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                     | <ul> <li>Anniv Date:</li> </ul> | 0 0                         |           |
|   |   |                   |                           |                                 |                             |           |
|   |   | Add Related Conta | n (Spouse) Email: mw@bigp | Setup Letter Head               | 670                         |           |
|   | ÷   | - Matthew Walter  | n (spouse) Email: mw@bigp | ond net woone. 0412 545         | 010                         |           |
| > Contact                                   | Modifications   | Contact Class: *  | Accountant                | 🗖 Past Ve                       | ndor                        | · · ·     |
| > Help Te                                   | xt  |                   | Save                      |                                 |                             |           |

4. You can click on a comment to edit the feedback. This will also edit the feedback logged against the property.

| Add Feedback          1 Jones Street, Copacabana         07/12/2011 10:00am - 10:30am         Contact:       Mary May         Price Feedback 5:       1320000         Contract Taken       Warm         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 Anomer       Save & View Contact | Inspection F                        | eedback             |
|--|-------------------------------------|---------------------|
| 07/12/2011 10:00am - 10:30am Contact: Mary May Price Feedback 5: 1320000 Contract Taken Warm 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.  | Add Feedback                        | (1) Other Feedback  |
| Price Feedback 5: 1320000 Contract Taken Warm 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.   | and the second second second second |                     |
| Comments:<br>Mary wanted a second look at the house with her<br>husband after the open house on the 5th. They really<br>love the property however need to check finances.  | Contact: Ma                         | ry May              |
| Mary wanted a second look at the house with her<br>husband after the open house on the 5th. They really<br>love the property however need to check finances.   | Contract Take                       |                     |
|  |                                     |                     |
|  | Sand or man mill                    | Suve a view contact |
|  |                                     |                     |
|  |                                     |                     |
|  |                                     |                     |

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 : Ma  | ary May           |                |                      | 0 8       |
|------------------|-------------------|----------------|----------------------|-----------|
|                  | • • • • • • • •   |                |                      | Full View |
| Contact Card R   | equirements       |                |                      |           |
| Status: *        | Active            |                |                      | *         |
| -:: Contact 1 :: |                   |                |                      | 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:       | 1                    |           |
| Residential Addr | ess: 1 Miles Road |                |                      |           |
| Suburb:          | Camperdown        | State:         | NSW                  | -         |
| Postcode:        | 2050              | Country:       | Australia            |           |
| 1                | imi.              | and are called | e deve alla se della |           |
|                  | Save              |                |                      |           |
|                  |                   |                |                      |           |

- 2. Click on Send an Email action icon @
- 3. Enter Subject and Message

| Email Contact :                       | Mary May   | 8 |
|---------------------------------------|--|---|
| Create New Email                      | View Sent Émail  |   |
| Reply To:<br>Send To: *<br>Subject: * | John Smith (john@agentbox.com.au)  |   |
| Message: *                            | B Z U E E E Paragraph → E E E<br>X A A A A A A A A A A A A A A A A A A A |   |
|                                       | Send   |   |

4. Click on Send

**SMS Contact** 

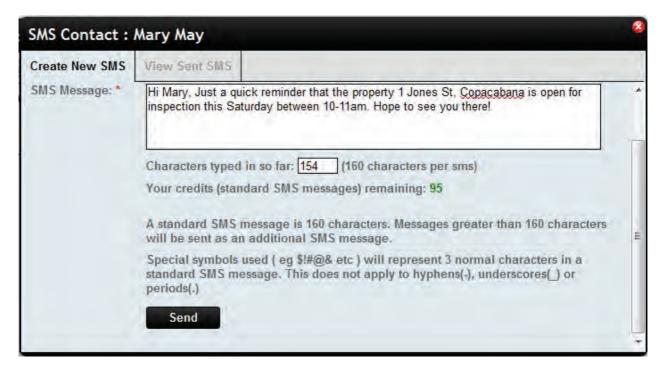
# How do I send an SMS to a Contact in Agentbox?

1. Search for your Contact and open their contact card

| @ 🖩 🖻 🎙                      | • • • • • • • •   |                 |                  | Full View |
|------------------------------|-------------------|-----------------|------------------|-----------|
| Contact Card Re              | equirements       |                 |                  |           |
| Status: *<br>:: Contact 1 :: | Active            |                 |                  |           |
| 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 Addr             | ess: 1 Miles Road |                 |                  |           |
| Suburb:                      | Camperdown        | State:          | NSW              |           |
| Postcode:                    | 2050              | Country:        | Australia        | •         |
|                              |                   | and are in an o | and also details |           |

- 2. Click on the SMS icon
- 3. Enter SMS Message

| SMS Contact :  | Mary May   | 8   |  |  |
|----------------|--|-----|--|--|
| Create New SMS | 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, <u>Copacabana</u> 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 character will be sent as an additional SMS message.   | ers |  |  |
|                | Special symbols used ( eg \$!#@& etc ) will represent 3 normal characters in a standard SMS message. This does not apply to hyphens(-), underscores(_) or periods(.) |     |  |  |



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 Card Requirements   Status: Active   *: Contact 1 ::   Title: Miss   Miss Home Phone:   02 9209 4174   Salutation: Work Phone:   02 9523 5642   First Name: May   Facsimile: 02 9209 4175   Last Name: May   Facsimile: 02 9209 4175   Email: mm@hotmail.com   Residential Address: Miles Road   Suburb: Camperdown   State: NSW   | :: Contact : M   | ary May           |                   |                      |           |
|--|------------------|-------------------|-------------------|----------------------|-----------|
| 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   | 0                |                   |                   |                      | Full View |
| :: Contact 1 ::   Title:   Miss   Salutation:   Work Phone:   02 9209 4174   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  | Contact Card R   | equirements       |                   |                      |           |
| 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:       Imm@hotmail.com         Residential Address:       1 Miles Road       State:       NSW         Suburb:       Camperdown       State:       NSW       Imm@hotmail         Postcode:       2050       Country:       Australia       Imm@hotmail | Status: *        | Active            | -                 |                      | *         |
| 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:   | -:: Contact 1 :: | (Alexandress)     |                   |                      | 1 =       |
| First Name: *       Mary       Mobile:       0411 222 555         Last Name: *       May       Facsimile:       02 9209 4175         Email:       mm@hotmail.com       Company:  | Title:           | Miss              | Home Phone:       | 02 9209 4174         |           |
| 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  | Salutation:      |                   | Work Phone:       | 02 9523 5642         |           |
| Email:       mm@hotmail.com       Company:         Residential Address:       1 Miles Road         Suburb:       Camperdown       State:       NSW         Postcode:       2050       Country:       Australia   | First Name: *    | Mary              | Mobile:           | 0411 222 555         |           |
| Residential Address:     1 Miles Road       Suburb:     Camperdown       Postcode:     2050       Country:     Australia   | Last Name: *     | May               | Facsimile:        | 02 9209 4175         |           |
| Suburb:     Camperdown     State:     NSW       Postcode:     2050     Country:     Australia  | Email:           | mm@hotmail.com    | Company:          | 1                    |           |
| Postcode: 2050 Country: Australia  | Residential Add  | ess: 1 Miles Road |                   |                      |           |
|  | Suburb:          | Camperdown        | State:            | NSW                  |           |
|  | Postcode:        | 2050              | Country:          | Australia            | •         |
|  | La ser           |                   | • ••• • • • • • • | e deve a la servició |           |
|  |                  |                   |                   |                      |           |

2. Click on the E-Newsletter Action icon

#### 3. Select a template

| Send E-Newsle       | etter            | 08   |
|---------------------|------------------|--|
| Step 1 of 3 - Selec | t a template     | View Saved E-Newsletters View Sent E-Newsletters |
| Select Template     | Delivery Details | Edit & Send E-Newsletter                         |
|                     |                  | <image/> <section-header></section-header>       |
| -                   |                  | General Enews                                    |
| 4                   |                  |  |
|                     |                  | Save & Proceed »                                 |

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-News                                 | etter                                     |                          |                          |                         |
|---|---|--------------------------|--------------------------|-------------------------|
| Step 2 of 3 - Edit                          | your delivery detail                      | s                        | View Saved E-Newsletters | View Sent E-Newsletters |
| Select Template                             | Delivery Details                          | Edit & Send E-Newsletter |                          |                         |
| Add Recipient:<br>Delivery To:              | Mary Jones<br>Mary May<br>Add New Contact | ~                        | mm@ho                    | Atd .                   |
| Reply From:<br>Subject: *<br>« Previous Ste |   | (office@agentbox.com.au) |                          | Save & Proceed »        |

6. Create E-Newsletter

| Send E-Newsle         | etter  |                           |                                   |                            |
|-----------------------|--|---------------------------|-----------------------------------|----------------------------|
| Step 3 of 3 - Edit th | hen send your e-ne                               | wsletter                  | View Saved E-Newsletters          | View Sent E-Newsletters    |
| Select Template       | Delivery Details                                 | Edit & Send E-Newsletter  |                                   |                            |
|                       | -Newsletter, select a<br>I lines to edit that se |                           | from the drop down box. Onc       | e it appears, simply click |
| Add Section:          |  | Add                       |                                   |                            |
|                       |  | Not interested anymore? U | nsubscribe                        | -                          |
|                       | AGENT <mark>BO</mark> )                          |                           | Newslette                         | r Update 💡                 |
|                       |  | :: In this Issue ::       | *                                 |                            |
| Thurso                | day, 17th November 20                            | 011                       | 02 9209 4174 - <u>office@agen</u> | tbox.com.au                |
| Hello                 | Contact's first name,                            |                           |                                   |                            |
| kind re<br>John       |  |                           |                                   |                            |
| L                     |  | *****                     |                                   | •••••                      |
| « Previous Ste        | p Send for 1                                     | esting Save               | Preview                           | Send Now                   |

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

| Title:MissHome Phone:02 9209 4174Salutation:Work Phone:02 9523 5642First Name:*MaryMobile:0411 222 555Last Name:*MayFacsimile:02 9209 4175Email:mm@hotmail.comCompany:Residential Address:1 Miles RoadSuburb:CamperdownState:NSWPostcode:2050Country:Australia   | :: Contact :  | Mary May             |                   |  |         | 08  |
|--|---------------|----------------------|-------------------|--|---------|-----|
| 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   | @             | 🖗 🍙 💣 🖬              |                   |  | Full Vi | ew  |
| :: Contact 1 ::   Title:   Miss   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  | Contact Card  | Requirements         |                   |  |         |     |
| 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:       Image: Compendent and Company:       Image: Compendent and Company:         Suburb:       Camperdown       State:       NSW       Image: Country:       Australia         Postcode:       2050       Country:       Australia       Image: Compendent and Country:       Image: Country:       Australia | Status: *     | Active               |                   |  |         | *   |
| Salutation:Work Phone:02 9523 5642First Name: *MaryMobile:0411 222 555Last Name: *MayFacsimile:02 9209 4175Email:mm@hotmail.comCompany:Residential Address:1 Miles RoadSuburb:CamperdownState:NSWPostcode:2050Country:Australia  | Contact 1 ::  |                      |                   |  |         | T E |
| First Name: *       Mary       Mobile:       0411 222 555         Last Name: *       May       Facsimile:       02 9209 4175         Email:       mm@hotmail.com       Company:       Image: Company:         Residential Address:       1 Miles Road       Suburb:       Camperdown       State:       NSW         Postcode:       2050       Country:       Australia       Image: Country:       Australia  | Title:        | Miss                 | Home Phone:       | 02 9209 4174   |         |     |
| Last Name: *       May       Facsimile:       02 9209 4175         Email:       mm@hotmail.com       Company:  | Salutation:   |                      | Work Phone:       | 02 9523 5642   |         |     |
| Email:       mm@hotmail.com       Company:         Residential Address:       1 Miles Road         Suburb:       Camperdown       State:         Postcode:       2050       Country:   | First Name: * | Mary                 | Mobile:           | 0411 222 555   |         |     |
| Residential Address:       1 Miles Road         Suburb:       Camperdown       State:       NSW         Postcode:       2050       Country:       Australia  | Last Name: *  | May                  | Facsimile:        | 02 9209 4175   |         |     |
| Suburb:     Camperdown     State:     NSW       Postcode:     2050     Country:     Australia  | Email:        | mm@hotmail.com       | Company:          |  |         |     |
| Postcode: 2050 Country: Australia  | Residential A | ddress: 1 Miles Road |                   |  |         |     |
|  | Suburb:       | Camperdown           | State:            | NSW  |         |     |
|  | Postcode:     | 2050                 | Country:          | Australia  |         |     |
|  |               |                      | - en i en i e e e | and the second | **      | 1 + |

- 2. Click on Log an Enquiry action icon 😱
- 3. Enter Enquiry Type, Select Property, Description of Enquiry and Assign Staff

| :: Log Enquiry   | : Mary May  | 2 |
|--|---|---|
| Enquiry Type:<br>Select Property:<br>Enquiry Date:<br>Description: * | General<br>Enter listing ID or Suburb name<br>17 11 2011 12 30 PM -                                   |   |
| Assign to Staff: *   | <ul> <li>□ Office Admin</li> <li>□ Joe Franks</li> <li>☑ John Smith</li> <li>□ Jane Thomas</li> </ul> |   |
| SMS Reminder:  | Insufficient SMS credits Submit   |   |

### 4. Click on Submit

See also

Communication History

# **Communication History**

View Communication History

1. Search for your Contact and open their Contact Card

| 🎆 Mary May              | :: Contact : Ma  | ry May   |  |                             |           |
|-------------------------|--|--|--|-----------------------------|-----------|
| < Back to Contacts      | @ 🖬 🖻 🖗  |  |  |                             | Full View |
| > Notes History         |  | quirements Related Pro   | operties (2)                                   |                             |           |
| Communication History   | Status: *  | Active   | -  |                             | 6         |
| > Activity Schedules    | -:: Contact 1 ::                                       | Active   |  |                             |           |
| > Viewed Inspections(1) | Title:   | Miss   | Home Phone:                                    | 02 9209 4174                |           |
| > Contact Modifications | Salutation:  |  | Work Phone:                                    | 02 9523 5642                |           |
| > Help Text             | First Name: *  | Mary   | Mobile:  | 0411 222 555                |           |
|                         | Last Name: *   | May  | Facsimile:                                     | 02 9209 4175                |           |
|                         | Email:   | mm@hotmail.com   | Company:                                       |                             |           |
|                         | Residential Addre                                      | ess: 1 Miles Road  |  |                             |           |
|                         | Suburb:  | Camperdown   | State:   | NSW                         | •         |
|                         | Postcode:  | 2050   | Country:                                       | Australia                   | •         |
|                         | Postal Address:  | E  | * Check if postal address                      | is different to residential | address   |
|                         | Contact Method:  | Email  | Anniv Date:                                    | 0 0                         |           |
|                         | Add Related Conta<br>Matthew Warre<br>Contact Class: * | act Add Related Property<br>n (Spouse) Email: mw@big<br>Accountant<br>Save | Setup Letter Head<br>pond.net Mobile: 0412 345 |                             |           |

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).

| stary May  | :: Contact : M  | ary May                  |             |              |           |
|--|-----------------|--------------------------|-------------|--------------|-----------|
| < Back to Contacts   |                 |                          |             |              | Full View |
| > Notes History  | Contact Card R  | equirements Related Prop | erties (2)  |              |           |
| ✓ Communication History  | Status: *       | Active                   | a           |              |           |
| <ul> <li>24/11/11 (Email) - Contract Request - created<br/>by: John Smith More Detail »</li> </ul> | Contact 1 ::    | [Active ]                |             |              |           |
|  | 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 Add | ess: 1 Miles Road        |             |              |           |
|  | Suburb:         | Camperdown               | State:      | NSW          |           |
|  | 1               | faces.                   | - · -       | 1            |           |
| -  |                 | Save                     |             |              |           |
| > Activity Schedules   |                 |                          |             |              |           |
| > Viewed Inspections(1)  |                 |                          |             |              |           |

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

| :: Contact : M    | lary May            |             |                     | 0 0       |
|-------------------|---------------------|-------------|---------------------|-----------|
| @                 | P 🎓 🕜 🗗 🖬           |             |                     | Full View |
| Contact Card      | Requirements        |             |                     |           |
| Status: *         | Active              | -           |                     | 4         |
| -:: Contact 1 ::- |                     |             |                     | 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 Add   | Iress: 1 Miles Road |             |                     |           |
| Suburb:           | Camperdown          | State:      | NSW                 |           |
| Postcode:         | 2050                | Country:    | Australia           |           |
|                   | Save                |             | n den sin den de de | ••• ] •   |

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 💌 |  |  |  |
| 1                         | 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

| Add Feedback                             | (1) Other Feedback   |
|--|--|
| 1 Jones Street, Co<br>07/11/2011 10:00am | See 1 Sector Sec |
| Contact: Ma                              | гу Мау   |
| husband after the                        | en Hot   |
| Save & Add Ano                           | ther 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

|                  |                   |                 |              | Full View |
|------------------|-------------------|-----------------|--------------|-----------|
| Contact Card R   | equirements       |                 |              |           |
| 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 Add  | ess: 1 Miles Road |                 |              |           |
| Suburb:          | Camperdown        | State:          | NSW          | -         |
| Postcode:        | 2050              | Country:        | Australia    | •         |
|                  |                   | and and an an a | we an except | 4.        |

- 2. Click on Add a Meeting action icon 🛄
- 3. Enter Meeting time, Heading, Description, Staff and assign Property (if applicable)

| :: Contact : Mar     | y May : Add a Meeting   | 8     |
|----------------------|---|-------|
| Create New Meeting   | View Future Meetings View Past Meetings   |       |
| 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.  | - 111 |
| Responsible Staff: * | <ul> <li>□ Office Admin</li> <li>□ Joe Franks</li> <li>□ John Smith</li> <li>□ Jane Thomas</li> <li>■ Malaria Thomas</li> </ul> |       |
| SMS Reminder:        | Tick here if you want to send SMS reminder to staff member(s).  |       |
| Assign Property:     |   | de +  |

#### 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:

- $_{\odot}$  Through a Contact card
- $_{\rm O}$   $\,$  Through the Fast Finds Results Panel  $\,$

#### Contact Card

1. Search for your Contact and open their Contact Card

| : Contact : Mai           | ry may           |                         |                               | Full Vie |
|---------------------------|------------------|-------------------------|-------------------------------|----------|
|                           | quirements       |                         |                               | ruii vie |
| tatus: *                  | Active           | •                       |                               |          |
| :: Contact 1 ::<br>Title: | Miss             | Home Phone:             | 02 9209 4174                  | 3        |
| Salutation:               |                  | Work Phone:             | 02 9523 5642                  |          |
| First Name: *             | Mary             | Mobile:                 | 0411 222 555                  |          |
| Last Name: *              | Мау              | Facsimile:              | 02 9209 4175                  | 1        |
| Email:                    | mm@hotmail.com   | Company:                |                               |          |
| Residential Addres        | ss: 1 Miles Road |                         |                               | 1        |
| Suburb:                   | Camperdown       | State:                  | NSW                           |          |
| Postcode:                 | 2050             | Country:                | Australia                     | -        |
| Postal Address:           |                  | Check if postal address | is different to residential a | address  |
| Contact Method:           | Email            | Anniv Date:             | 0 0                           |          |

- 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



4. 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

1. Click on Contacts from the main menu



- 2. Search for your Contact on the Fast Find Left Panel
- 3. Click on 'Match properties to this contact' action icon from the Fast Find Results Panel

| S Contacts   | ✓ Fast Find Results   |
|--|---|
| • Fast Find (1 found)<br>The system will auto filter your results<br>based on how much info you enter below. | Mary May<br>0411 222 555<br>1 Miles Road<br>Camperdown, NSW |
| First Name: Mary Last Name: May Company: Advanced Search   |   |
| • Add a Contact  |   |
|  |   |

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 <u>General E-News</u> <u>template</u>.

\*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.



\*Note: If you click on the Preview action icon 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.



#### Edit my requirements

Visit our Web Site

#### **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

Luxury Balinese Inspired Residence

bed 3 | bath 4 | park 2

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

| :: Contact : Ma                         | ry May            |                 |              | 0 6       |
|---|-------------------|-----------------|--------------|-----------|
| @                                       |                   |                 |              | Full View |
| Contact Card Re                         | quirements        |                 |              |           |
| Status: *                               | Active            |                 |              | 4         |
| -:: Contact 1 ::                        |                   |                 | 12           | 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 Addre                       | ess: 1 Miles Road |                 |              |           |
| Suburb:                                 | Camperdown        | State:          | NSW          |           |
| Postcode:                               | 2050              | Country:        | Australia    | •         |
| 1 - 1 - 1 - 1 - 1 - 1 - 1 - 1 - 1 - 1 - |                   | and and the set |              |           |
|   | Save              |                 |              |           |

- 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 : Ma                 | ary May : Add a Note  |
|---------------------------------|---|
| Create New Note                 | View Previous Notes   |
| Note Date: *<br>Headline: *     | 05 11 2011 02 • 45 • PM •<br>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 Propertie              | s: ID #1P0001 - 1 Jones Street, Copacabana                                      |
| Publish Note:<br>Add as a Task: | Publishing this note will allow all relevant staff to view this note.           |
|                                 | 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   |   |
| <ul> <li>Comments - Has 3 kids, looking for a larger<br/>home.</li> </ul>   | - |
| <ul> <li>05/11/11 - Possible Hot Buyer - 1 Jones St,<br/>Copacabana 1P0001 : Mary seems to be<br/>quite taken by 1 Jones St. Looks like a<br/>promising buyer created by: John Smith<br/>More Detail »</li> </ul> |   |
|   |   |
| <ul> <li>Communication History</li> </ul>   |   |
| > Activity Schedules  |   |
| > Viewed Inspections(1)   |   |
| > Contact Modifications   |   |
| > Help Text   |   |

### Advanced Contact Search Results

1. Perform an Advanced Contact Search

| New Search     | Search Results     | Refine Search        |                   | Saved Searches |
|----------------|--------------------|----------------------|-------------------|----------------|
| Sort By: Conta | act Last Name: A-Z | -                    |                   |                |
| Contact        |                    | Assigned Staff       | Last Contacted    | Contact Info   |
| Apex Printing  |                    | Jane Smith           |                   |                |
| Jack Black     |                    | Jane Smith           |                   | N/Q            |
| Gary Brown     |                    | Jane Smith           |                   |                |
| Julia Burn     |                    | Jane Smith           | 14/02/12 (letter) |                |
| Nick Citizen   |                    | Jane Smith           |                   | 20             |
| Kim French     |                    | Jane Smith           |                   | 120            |
| Kate Green     |                    | Jane Smith           |                   | 20             |
| Maria Hook     |                    | Jane Smith           |                   |                |
| Max Hook       |                    | Jane Smith           |                   |                |
| Michael Johns  | on                 | Jane Smith           | 21/03/12 (email)  |                |
| Samuel Johnso  | n                  | Joseph Western(more) |                   | ROM            |

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  $\blacksquare$  next to the corresponding Contact.

| Today's Up    | coming Completed Ove | erdue        |                            |   |   |                                       |
|---------------|----------------------|--------------|----------------------------|---|---|---------------------------------------|
| Tasks Keyword | Search               | Action - Sea | rch                        |   |   |                                       |
| Due Due       | Related Contact(s)   | ~            | Related Property(s)        | Subject   | Description                               | Action                                |
| 04/11/2011    | Michael Johnson      | CE I         | 1 Jones Street, Copacabana | General Enquiry   | Would like to inspect the property        | Create Letter<br>Make a Phone<br>Call |
| 18/11/2011    | Samantha Jones       | CE IZ        | 1 Jones Street, Copacabana | Buyer Enquiry - Listing ID<br>#1P0001 - 1 Jones Street,<br>Copacabana | Would like to privately inspect the prop  |                                       |
| 18/11/2011    | Samantha Jones       | CER          | 1 Jones Street, Copacabana | Send letter   | Send attached letter.                     | Create Letter                         |
| 20/11/2011    | Samantha Jones       | ee Iz        | 1 Jones Street, Copacabana | Make a phone call   | discuss likelihood of selling             | Make a Phone<br>Call                  |
| 24/11/2011    | Mary May             | QUEIZ        | 1 Jones Street, Copacabana | Contract Request  | Has a meeting on Friday with<br>solicitor |                                       |

# **View Contact Notes History**

# View Contact Notes History

#### 1. Search for your Contact and open their Contact Card

| S Mary May   | :: Contact : Ma  | ry May  |               |  |                        |               | • 8 |
|--|--|---|---------------|--|------------------------|---------------|-----|
| < Back to Contacts   | @  |   |               | 1  |                        | Full Vi       | iew |
| <ul> <li>Notes History</li> <li>Communication History</li> </ul> |  | quirements Related Pr                           | roperties (2) |  |                        |               |     |
| > Activity Schedules   | -:: Contact 1 ::                                       | Active  |               |  |                        |               | -ĥ  |
| > Viewed Inspections(1)  | Title:   | Miss  | - Hon         | ne Phone:  | 02 9209 4174           |               |     |
| > Contact Modifications  | Salutation:  |   | Wor           | k Phone:   | 02 9523 5642           |               | E   |
| > Help Text  | First Name: *  | Mary  | Mob           | ile:   | 0411 222 555           |               |     |
|  | Last Name: *   | May   | Fac           | simile:  | 02 9209 4175           |               |     |
|  | Email:   | mm@hotmail.com                                  | Con           | npany:   |                        |               |     |
|  | Residential Addre                                      | ess: 1 Miles Road                               |               |  |                        |               |     |
|  | Suburb:  | Camperdown                                      | Stat          | e:   | NSW                    |               |     |
|  | Postcode:  | 2050  | Cou           | ntry:  | Australia              | •             |     |
|  | Postal Address:  |   | * Check if p  | ostal address  | is different to reside | ntial address |     |
|  | Contact Method:  | Email   | - Ann         | iv Date:   | 0 0                    |               |     |
|  | Add Related Conta<br>Matthew Warre<br>Contact Class; * | Add Related Property<br>n (Spouse) Email: mw@bi |               | the state of the s |                        | ×.            | -   |

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 <u>Add Note</u> action Icon.

| 🥵 Mary May   | :: Contact : Ma  | ary May                   |             |              | 00        |
|--|------------------|---------------------------|-------------|--------------|-----------|
| < Back to Contacts   | @                |                           |             |              | Full View |
| ✓ Notes History  | Contact Card Re  | equirements Related Prope | rties (2)   |              |           |
| Comments - Has 3 kids, looking for a larger<br>home.   | Status: *        | Active                    | R.C.        |              | *         |
| <ul> <li>05/11/11 - Possible Hot Buyer - 1 Jones St,<br/>Copacabana 1P0001 : Mary seems to be</li> </ul> | Title:           | Miss                      | Home Phone: | 02 9209 4174 |           |
| quite taken by 1 Jones St. Looks like a<br>promising buyer created by: John Smith                        | Salutation:      |                           | Work Phone: | 02 9523 5642 |           |
| More Detail »  | First Name: *    | Mary                      | Mobile:     | 0411 222 555 |           |
|  | Last Name: *     | Мау                       | Facsimile:  | 02 9209 4175 |           |
|  | Email:           | mm@hotmail.com            | Company:    |              |           |
|  | Residential Addr | ess: 1 Miles Road         |             |              |           |
|  | Suburb:          | Camperdown                | State:      | NSW          |           |
| Communication History  | 1                | Save                      |             |              |           |
| > Activity Schedules   |                  |                           |             |              |           |
| > Viewed Inspections(1)  |                  |                           |             |              |           |

4. You can view the note by clicking More Detail.

| s Mary May  | :: C :: Contact : Ma  | ary May : Edit Note d   |
|---|---|---|
| < Back to Contacts  | Create New Note   | View Previous Notes   |
| ✓ Notes History   | Cont Note Date: *   | 05 11 2011 III 02 • 45 • PM •   |
| <ul> <li>Comments - Has 3 kids, looking for a larger<br/>home.</li> </ul>   | Statu Headline: *   | Possible Hot Buyer - 1 Jones St, Copacabana 1P0001  |
| • 05/11/11 - Possible Hot Buyer - 1 Jones St,<br>Copacabana 1P0001 : Mary seems to be<br>quite taken by 1 Jones St. Looks like a<br>promising buyer created by: John Smith<br>More Detail » | Tit<br>Sa<br>Fin<br>La:<br>Em Assign Property:<br>Re Selected Propertie<br>Su | Mary seems to be quite taken by 1 Jones St. Looks like a promising buyer.           Enter listing ID or Suburb name         ABI |
| Communication History   |   |   |
| > Activity Schedules  | Publish Note:   | Publishing this note will allow all relevant staff to view this note.   |
| > Viewed Inspections(1)   |   | Save  |

# **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 <u>Create a Single Task</u> <u>Apply Activity Schedule</u> 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

| Create New Task View Current Tas                                   | sks View Completed Tasks        | 1        |       |            |      |
|--|---------------------------------|----------|-------|------------|------|
| Task   | Responsible Staff               | Due      | Done? | Listing(s) |      |
| Buyer Enquiry - Listing ID #1P0001 - 1<br>Jones Street, Copacabana | John Smith,<br>Melanie Thompson | 18/11/11 | no    | #1P0001    | elet |
| Send letter  | John Smith                      | 18/11/11 | ло    | #1P0001    | elet |
| Make a phone call  | John Smith,<br>Melanie Thompson | 20/11/11 | no    | #1P0001    | elet |
|  |                                 |          |       |            |      |

You may also be interested in: <u>How to edit a task</u> <u>How to attach a file to a task</u> 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

| S Mary May                                 | :: Contact : Ma  | ry May                   |   |                               |           |
|--|--|--------------------------|---|-------------------------------|-----------|
| < Back to Contacts                         | @ 🖬 🖻 🖗  |                          |   |                               | Full View |
| > Notes History<br>> Communication History |  | quirements Related Pr    | operties (2)  |                               |           |
| > Activity Schedules                       | -:: Contact 1 ::                                       | T. C. C.                 |   |                               |           |
| > Viewed Inspections(1)                    | Title:   | Miss                     | Home Phone:   | 02 9209 4174                  |           |
| > Contact Modifications                    | Salutation:  | 1                        | Work Phone:   | 02 9523 5642                  | E         |
| > Help Text                                | First Name: *  | Mary                     | Mobile:   | 0411 222 555                  |           |
| a state of the state                       | Last Name: *   | May                      | Facsimile:  | 02 9209 4175                  |           |
|  | Email:   | mm@hotmail.com           | Company:  |                               |           |
|  | Residential Addre                                      | ess: 1 Miles Road        |   |                               |           |
|  | Suburb:  | Camperdown               | State:  | NSW                           |           |
|  | Postcode:  | 2050                     | Country:  | Australia                     | •         |
|  | Postal Address:  | E                        | * Check if postal address   | is different to residential a | address   |
|  | Contact Method:  | Email                    | <ul> <li>Anniv Date:</li> </ul>   | 0 0                           |           |
|  | Add Related Conta<br>Matthew Warre<br>Contact Class: * | n (Spouse) Email: mw@big | and the second se |                               | ×) -      |

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).

|             |  | Full View  |
|-------------|--|--|
|             |  |  |
| es (2)      |  |  |
|             |  |  |
|             |  |  |
| Home Phone: | 02 9209 4174                                     |  |
| Work Phone: | 02 9523 5642                                     |  |
| Mobile:     | 0411 222 555                                     |  |
| Facsimile:  | 02 9209 4175                                     |  |
| Company:    | <u> </u>   |  |
|             |  |  |
| State:      | NSW  |  |
| ~ ·         | 1  |  |
|             |  |  |
|             | Work Phone:<br>Mobile:<br>Facsimile:<br>Company: | Work Phone:         02 9523 5642           Mobile:         0411 222 555           Facsimile:         02 9209 4175           Company: |

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.

| S Mary May   | :: Contact : Mary May   | 0 3       |
|--|---|-----------|
| < Back to Contacts   |   | Full View |
| > Notes History  | Contact Card Requirements Related Properties (2)  |           |
| Communication History  | Status: * Active  |           |
| ✓ Activity Schedules   |   |           |
| 14/12/2011 - New Listing More Detail »     19/12/2011 - Send letter     24/12/2011 - Make a phone call | 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 |           |
| > Viewed Inspections(1)  | Suburb: Camperdown State: NSW Save  |           |

# 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

| :: Contact : Mai   | ту Мау                  |                         |                                 | •         |
|--------------------|-------------------------|-------------------------|---------------------------------|-----------|
| 0 🖬 🖻 🖗            | \$ \$ <b>[</b>          |                         |                                 | Full View |
| Contact Card Reg   | uirements               |                         |                                 |           |
| 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 Addres | ss: 1 Miles Road        |                         | ~                               |           |
| Suburb:            | Camperdown              | State:                  | NSW                             |           |
| Postcode:          | 2050                    | Country:                | Australia                       |           |
| Postal Address:    | □*(                     | Check if postal address | is different to residential add | dress     |
| Contact Method:    | Email                   | Anniv Date:             | 0 0                             |           |
|                    |                         |                         |                                 |           |
| Add Related Conta  | ct Add Related Property | Setup Letter Head       |                                 |           |
|                    |                         |                         |                                 |           |
|                    | Save                    |                         |                                 |           |
|                    |                         |                         |                                 |           |

2. Click on Create A Letter action icon

|                                       | : Mary Ma         | iy  |               |             |
|---------------------------------------|-------------------|---|---------------|-------------|
| tep 1 of 3 - Select T                 | emplate           |   | View create   | d letters . |
| emplates Modify                       | The Letter        | Letter Distribution   |               |             |
| elect a Template:                     | Purchaser         | Sales Advice  |               |             |
| :: Template Preview                   | N ::              |   |               |             |
| Send From:                            | Select S          | Staff Member (By default will be yourself)  |               |             |
| Purchaser Sales Ac                    | lvice             |   |               |             |
|                                       | Fax               | one: 02 9209 4174<br>c: 02 9310 7232<br>vail: office@agentbox.com.au<br>N: 11 222 112 142 |               |             |
|                                       |                   |   |               |             |
| Property Details                      | S                 |   |               |             |
| Property Details<br>Property Address: | s<br>{\$prop_loc} |   |               |             |
| 1                                     | 1                 |   | Deposit Held: |             |

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).

| Conjunctional Agent | Concitor   | 75  |
|---------------------|--|---|
| V Developer         | Supplier   | <u></u>   |
| Investor            | Tenant   |   |
| Landlord            | Tradesperson   |   |
| Other               | Vendor   | -   |
| Owner Occupied      | Vendor Solicitor   | ŧ   |
| Past Purchaser      |  | -   |
|                     | Developer     Investor     Landlord     Other     Owner Occupied | Ø Developer       Supplier         Investor       Tenant         Landlord       Tradesperson         Other       Ø Vendor         Ø Owner Occupied       Vendor Solicitor |

| Contact L  | etter ::                     | Mary Ma  | зу   |                   | 8      |
|--|------------------------------|--|--|-------------------|--------|
| Step 1 of 3 -  | Select Ter                   | mplate   | -  | View created left | ters o |
| Templates  | Modify Ti                    | he Letter  | Letter Distribution  |                   |        |
| Select a Ten<br>":: Template<br>Send From<br>Purchaser | e Preview<br>I:<br>Sales Adv | Purchaser<br>Vendor Sa<br>Offer Notifi<br>Prospectin<br>Prospectin<br>Prospectin<br>Purchaser<br>Purchaser<br>Purchaser<br>Vendor Ex<br>Vendor So<br>Vendor So<br>Vendor So<br>Vendor So<br>Vendor So<br>Vendor So | Sales Advice Sales Advice Sales Advice Sales Advice Sales Advice Default Templates Cation Letter  g Letter Auction Invitation g Letter Buyers Waiting g Letter OFI Invite g Letter OFI Invite Settlement Letter Solicitor Exchange Letter Change Letter Solicitor Exchange Letter Solicitor Request for Contracts: Auction Solicitor Request for Contracts: Private Treaty ankyou for Listing Letter Office Templates Tions - Buyer tions - Vendor | Save & Procee     | d »    |

- 4. Click on Save & Proceed
- 5. Modify the Letter if necessary

| tep 2 of 3 -  | Modify The Letter  |  | View created letters a               |
|---|--|--|--------------------------------------|
| emplates  | Modify The Letter  | Letter Distribution                      |                                      |
| B / U   | 📑 🗃 🗐 Parag  |  | ≇ □<br>Ω ⊡ 0 A % ∢ ∺                 |
| 5th December<br>Miss Mary May<br>1 Miles Road<br>Camperdown I | 1  |  | E                                    |
| Dear Mary,<br>You cai   | n type in extra  | text here that will not cl               | hange the template                   |
|   | aking place in your area at property values in your area | Jones Street, Copacobana. The auction re | sult may provide you with up to date |
|   | us Step  |  | Save & Proceed »                     |

6. Click on Save & Proceed

#### Either

- \* Click on Print to generate a PDF for download
- \* Export to WinWord

| Distribution Method:<br>-:: Print this Letter ::<br>Print This<br>prop         | The Letter Distribution   | View created letters »<br>g needs and will save a copy to the |
|--|---|---|
| Distribution Method:<br>-:: Print this Letter ::<br>Print This<br>prop<br>This | Print as PDF<br>Print as PDF<br>Send as HTML email<br>Send as an attachment via email<br>will convert the Letter to a PDF for your printing | g needs and will save a copy to the                           |
| -:: Print this Letter ::<br>Print This<br>prop                                 | Print as PDF<br>Send as HTML email<br>Send as an attachment via email<br>will convert the Letter to a PDF for your printin                  | g needs and will save a copy to the                           |
|  | will convert the Letter to a WinWord Documen  |   |
| « 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

| tep 3 of 3 - Letter Distribution         emplates       Modify The Letter         Letter Distribution         istribution Method:       Send as an attachment via email *         ::: Option to Email this Letter ::         Email Subject: *       Vendor Solicitor Request for Contracts: Auction         Email Message ::       B I I I I I I I I I I I I I I I I I I I  |                        | : Mary Ma                        | y  |   |
|---|------------------------|----------------------------------|--|---|
| istribution Method: Send as an attachment via email ★         :: Option to Email this Letter ::         Email Subject: *       Vendor Solicitor Request for Contracts: Auction         Email Message :       B I I I I I I I Format I I I I I I I I I I I I I I I I I I I   | tep 3 of 3 - Letter Di | stribution                       |  | View created letters »  |
| second secon | mplates Modify 1       | The Letter                       | Letter Distribution  |   |
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| 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:       Aud  | Email Message :        | XAB                              | 🛅 🛅 🗟 😅 🦈 •  | -   |
| Assign Contact:   |                        | Downloa<br>If you do<br>your com | ding PDF Documer<br>not already have the<br>puter, you will first ne | nts<br>free Acrobat Reader application installed on<br>eed to download it before looking at the |
|   | Reply From:            | Jane Smith                       | (jane@agentbox.com.  | au)   |
| Email Contact(s)?: V Mary May   |                        |                                  |  | Add   |
|   | eman contact(s)s:      | Mary Ma                          | y.   |   |

# **View Contact Modifications**

**View Contact Modifications** 

1. Search for your Contact and open their Contact Card

| 🥵 Mary May  | :: Contact : Ma  | ry May   |  |                                 | 🕤 🕄       |
|---|--|--|--|---------------------------------|-----------|
| < Back to Contacts  | @ 🖬 🖻 🖗  |  |  |                                 | Full View |
| <ul><li>Notes History</li><li>Communication History</li></ul> | Contact Card Re  | quirements Related Pro   |  |                                 |           |
| > Activity Schedules  | Status: *  | Active   | -  |                                 | î         |
| > Viewed Inspections(1)                                       | Títle:   | Miss   | - Home Phone:                                  | 02 9209 4174                    |           |
| > Contact Modifications                                       | Salutation:  |  | Work Phone:                                    | 02 9523 5642                    | E         |
| > Help Text   | First Name: *  | Mary   | Mobile:  | 0411 222 555                    |           |
|   | Last Name: *   | May  | Facsimile:                                     | 02 9209 4175                    |           |
|   | Email:   | mm@hotmail.com   | Company:                                       |                                 |           |
|   | Residential Addre                                      | ess: 1 Miles Road  |  |                                 |           |
|   | Suburb:  | Camperdown   | State:   | NSW                             | -         |
|   | Postcode:  | 2050   | Country:                                       | Australia                       | •         |
|   | Postal Address:  |  | * Check if postal address                      | is different to residential add | dress     |
|   | Contact Method:  | Email  | Anniv Date:                                    | 0 0                             |           |
|   | Add Related Conta<br>Matthew Warre<br>Contact Class; * | act Add Related Property<br>n (Spouse) Email: mw@big<br>[ Accountant<br>Save | Setup Letter Head<br>pond.net Mobile: 0412 345 |                                 | F         |

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.

| 2                             |  |   |   |               |
|-------------------------------|--|---|---|---------------|
|                               |  |   |   | Full View     |
| ct Card Requ                  | uicements Related Proper   | ties (2)  |   |               |
| .*                            | Active   | 6   |   |               |
| ntact 1 ::                    |  |   |   |               |
| 5                             | Miss   | Home Phone:   | 02 9209 4174  |               |
| tation:                       |  | Work Phone:   | 02 9523 5642  |               |
| Name: *                       | Mary   | Mobile:   | 0411 222 555  |               |
| Name: *                       | May  | Facsimile:  | 02 9209 4175  |               |
|                               | mm@hotmail.com   | Company:  |   |               |
| dential Addres                | s: 1 Miles Road  |   |   |               |
| urb:                          | Camperdown   | State:  | NSW   |               |
| code:                         | 2050   | Country:  | Australia   |               |
| al Address:                   | □*C  | heck if postal address i  | is different to residential   | address       |
| and an and a fac              | Email  | Anniv Date:   | 0 0 [   |               |
| and the set of the set of the | Contraction in the second states of the                          | and the second  | 678   |               |
| ct Class: *                   | Accountant   | 🔲 Past Ve   | ndor  | - 1           |
|                               | urb:<br>code:<br>al Address:<br>tact Method:<br>d Related Contac | Intact 1 ::- Inta | Image: Second | initiact 1 :: |

### 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.
  - $_{\odot}$  Your overdue tasks will appear in red
  - $_{\odot}$   $\,$  You can click through the contacts name to open the contact card, property address to open the property card etc.
  - $_{\odot}$  You can tab across to view your upcoming or overdue tasks
  - $_{\odot}$  You can filter your tasks e.g. bring up all your make phone call tasks or search for a keyword.
  - $_{\odot}$  You can add a task, apply an activity schedules, bulk complete tasks or print your tasks

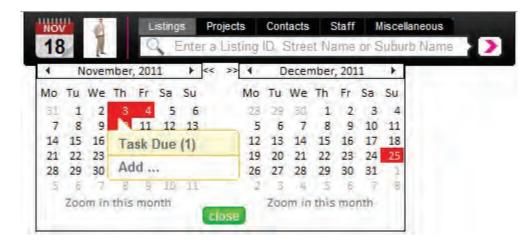
| 🥸 Tasks      |                      |              |                                  |   |   |                      |  |
|--------------|----------------------|--------------|----------------------------------|---|---|----------------------|--|
| oday's Up    | coming Completed Ove | erdue        |                                  |   |   |                      |  |
| asks Keyword | Search Filter A      | Action 👻 Sea | arch                             |   |   |                      |  |
| Due          | Related Contact(s)   |              | Related Property(s)              | Subject   | Description                                 | Action               |  |
| 26/10/2011   | Jack Black           | • 12         | 52 Elizabeth Street, Surry Hills | Contract Request  | send a copy of the contract                 | Make a Phone Call    |  |
| 03/11/2011   | Thomas Train         | OF IZ        | 52 Elizabeth Street, Surry Hills | Vendor is going away for<br>3 weeks                                   | hrvis uvisuvhwku wiuhv siuvfh Isifvg<br>Isu | Make a Phone<br>Call |  |
| 04/11/2011   | Michael Jones        |              | 1 Jones Street, Copacabana       | General Enquiry   | Would like to inspect the property          | Make a Phone<br>Call |  |
| 18/11/2011   | Samantha Jones       | or Iz        | 1 Jones Street, Copacabana       | Buyer Enquiry - Listing ID<br>#1P0001 - 1 Jones Street,<br>Copacabana | Would like to privately inspect the prop    |                      |  |
| 18/11/2011   | Samantha Jones       | WHE 17       | 1 Jones Street, Copacabana       | Send letter   | bsrtbsmsnsrfnfn                             | 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

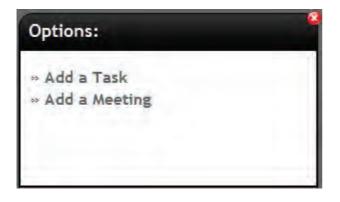


#### To view/edit - Click Task Due

Click the task you would like to view/edit Follow the steps <u>How to Edit a Task</u>

| Add  | Friday - November 18, 2011               | day week month > |
|--|--|------------------|
|  |  |                  |
|  |  |                  |
| Task Due - Buyer Enquiry<br>Task Due - Send letter | - Listing ID #1P0001 - 1 Jones Street, C | opacabana        |

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 <u>Calendar</u>, <u>Property</u>, <u>Contact</u> or the <u>Task view</u> 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

| :: Listing : 1P0                            | 001 - Copacaban  | a : Add Task         | 8   |
|---|--|----------------------|-----|
| Create New Task                             | View Current Tasks   | View Completed Tasks |     |
| Task Entered: *<br>Task Due:<br>Headline: * | 18         11         2011           23         11         2011           Task Headline         2011 |                      |     |
| Description: *                              | Enter task description   |                      | 3   |
| Responsible Staff: *                        | Office Admin     Joe Franks     John Smith     Jane Thomas   |                      | *   |
| Assign Contact:                             |  |                      | hbA |
| Selected Contact(s)                         |  |                      | - + |

3. Hit save, the task will appear in your <u>task view</u> 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 <u>Calendar</u>, <u>Property</u>, <u>Contact</u> or the <u>Task view</u> screen.
- 2. Edit the task details, upload document and/or assign action and hit save

| 💕 Tasks       |                |        |                  |      | :: Staff : John Smith : Edit Task   |      |
|---------------|----------------|--------|------------------|------|---|------|
| Today's       | peoming Com    | pleted | Overdue          |      | Edit Task View-Current Tasks View Completed Tasks                                 |      |
| Tasks Keyword | Search         | -Fil   | Iter Action 👻 Se | arch | Selected Properties: 12 1P0001 - 1 Jones Street, Copacabana                       | *    |
| 🗖 Due         | Related Contac | t(s)   |                  | R    |   |      |
| 26/10/2011    | Jack Black     |        | @ 12             | 52   | Assign Action:  | one  |
| 03/11/2011    | Thomas Train   |        | ee Z             | 52   | Selected Actions: I Make a Phone Call   | one  |
| 04/11/2011    | Michael Jones  |        |                  | 1    |   | one  |
| 18/11/2011    | Samantha Jones | 3.     | @ <b>@</b>  2    | 1    | Task Completed?:  |      |
| 18/11/2011    | Samantha Jones | 3.     | QEZ              | 1    | Document(s) Upload Please ensure that a document does not exceed 5MB in filesize. | ⊨ er |

## **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

| :: Staff : | John Smith : Edi       | t Task   |   |
|------------|------------------------|--|---|
| Edit Task  | View Current Tasks     | View Completed Tasks                                   |   |
| Selected H | roperties: [           | Jones Street, Copacabana                               |   |
| Assign Act | ion:                   | And  |   |
| Selected A | Actions: V Make a Pł   | ione Call  |   |
| Task Com   | pleted?:               |  |   |
| F:: Docum  | ents ::                |  | ٦ |
| Docume     | ent(s) Upibad Please e | nsure that a document does not exceed 5MB in filesize. | E |
|            | Save                   |  |   |

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.

| Browse Files     |                  |        |
|------------------|------------------|--------|
|                  | Overall progress |        |
|                  |                  | 0%     |
|                  | File Progress    |        |
|                  |                  | 0%     |
|                  |                  |        |
| Clear List       |                  | Upload |
| elected 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)

| Look in       | : 🌙 photos     |                | - 61     | * ₩▼ |      |
|---------------|----------------|----------------|----------|------|------|
| Recent Places | File to Upload | File to Upload | melanie  |      |      |
| Libraries     |                |                | inclaime |      |      |
| Computer      |                |                |          |      |      |
| Network       |                |                |          |      | 1    |
|               | File name:     | File to Upload |          | -    | Open |

3. Click the green Upload button to upload the file(s).

| Overall Progress (8)     | 0.1 kB)    |
|--------------------------|------------|
|                          | 36%        |
| File Progress "File to U |            |
|                          | 36%        |
| Upload with 168 kB/s. T  | me left: ~ |
| Clear List               | Upload     |
| Selected Files ::        |            |
| File to Upload.pdf       | 80.1 kB    |

4. Once uploaded you will return to the task view, you can open the attachment by clicking View.

| View Current Tasks          | View Completed Tasks                  | 1     |
|-----------------------------|---------------------------------------|-------|
| n:<br>ions: I Make a Ph     | Add<br>none Call                      |       |
| to Upload.pdf   Updated 18t | <b>View</b><br>h Nov, 2011   80.07 KB |       |
| i<br>i                      | ted?:                                 | ted?: |

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.

| Edit Task<br>Selected P | View Current Tasks<br>roperties: 2 1P0001 -  | View Completed Tasks 1 Jones Street, Copacabana      |     |
|-------------------------|--|--|-----|
|                         |  |  |     |
| Assign Acti             | on:  | Aub  |     |
| Selected A              | Create a Tas<br>Create Digita  | k<br>I Print   |     |
| Task Comp               | Ideted?: Create Lette<br>Create Vend<br>Make a Pho<br>Send Email<br>Send Enews<br>Send SMS | or Report.<br>ne Call                                |     |
| Docume                  |  | ensure that a document does not exceed 5MB in filesi | ze. |

3. Click the green Add button to add the action to the selected actions box.

| :: Staff : | : John Smith     | : Edit Task  | - 8  |
|------------|------------------|--|--|
| Edit Task  | View Current 7   | CALLER 1 AND AN AND A REAL PROPERTY AND A REAL |  |
| Selected H | roperties: V 1P( | 001 - 1 Jones Street, Copacabana   |  |
| Assign Act | tion: Create     | Letter Add   |  |
| Selected # | Actions: 🖾 Mal   | e a Phone Call Add this Action   |  |
| Task Com   | pleted?:         |  | , in the second se |
| C:: Docum  | ients ::         |  |  |
| Docume     | ent(s) Upload P  | ease ensure that a document does not exceed 5MB in filesize.   | =  |
|            | Sa               | /e   | -  |

4. If assigning a letter, digital print or e-newsletter you can select the template your would like to use by clicking Select Template.

| :: Staff : | John S          | mith : Edi    | it Task   |
|------------|-----------------|---------------|---|
| Edit Task  | a second second | rrent Tasks   |   |
| Selected P | roperties:      | IP0001 - 1    | 1 Jones Street, Copacabana                              |
|            |                 |               |   |
| Assign Act | ion:            | Create Letter | And V   |
| Selected A | Actions:        | Create Let    | hone Call   |
|            |                 |               | click and select temp                                   |
| Task Comp  | pleted?:        |               |   |
| C:: Docum  | ents ::         |               | 1   |
| Docume     | ent(s) Uploa    | Please e      | ensure that a document does not exceed 5MB in filesize. |
| <u>.</u>   |                 |               |   |
|            |                 | Save          |   |

5. Select the template you would like to use from the drop down and click save

| Select Letter Template                                     | * |
|--|---|
| Select Template:*<br>Protect Fee Letter - Vendor Solicitor |   |
| Save Calice  |   |
| ~  |   |

6. Click Save to finish

| :: Staff :  | John Smith : Ed       | iit Task  | 8 |
|-------------|-----------------------|---|---|
| Edit Task   | View Current Tasks    | View Completed Tasks                                    |   |
| Selected P  | roperties: ⊠ 1P0001 - | 1 Jones Street, Copacabana                              | * |
| Assign Acti | ion:                  | Add   | 1 |
| Selected A  | Create Le             |   |   |
| Task Comp   | leted?:               |   |   |
| Docume      |                       | ensure that a document does not exceed 5MB in filesize. | E |

## **Completing Tasks**

How do I complete a task?

1. You can mark a task complete in the <u>task view</u> or by <u>editing a task</u>

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.

| Today's Up   | coming Completed   | Overdue        |                                  |   |   |                      |
|--------------|--------------------|----------------|----------------------------------|---|---|----------------------|
| Due .        | Related Contact(s) | The Action +   | Related Property(s)              | Subject   | Description                                 | Action               |
| 26/10/2011   | Jack Black         | @ 12           | 52 Elizabeth Street, Surry Hills | Contract Request  | send a copy of the contract                 | Make a Phone<br>Call |
| 03/11/2011   | Thomas Train       | @ <b>@</b>   2 | 52 Elizabeth Street, Surry Hills | Vendor is going away for 3 weeks                                      | hrvis uvisuvhwku wiuhv sluvfh lsifvg<br>lsu | Make a Phone<br>Call |
| 04/11/2011   | Michael Jones      | ee R           | 1 Jones Street, Copacabana       | General Enquiry   | Would like to inspect the property          | Make a Phone<br>Call |
| 2 18/11/2011 | Samantha Jones     | ee R           | 1 Jones Street, Copacabana       | Buyer Enquiry - Listing ID<br>#1P0001 - 1 Jones Street,<br>Copacabana | Would like to privately inspect the prop    |                      |
| 18/11/2011   | Samantha Jones     | elela          | 1 Jones Street, Copacabana       | Send letter   | bsrtbsrnsnsrfnfn                            | Create Letter        |

3. This example is from editing a task. Tick the Task Completed check box and click save.

| :: Staff : | : John Smith : Edi      | t Task   | 0 |
|------------|-------------------------|--|---|
| Edit Task  | View Current Tasks      | View Completed Tasks                                   |   |
| Selected H | roperties: V 1P0001 - 1 | Jones Street, Copacabana                               | - |
| Assign Act | ion:                    | And  |   |
| Selected A | Actions: Make a Ph      | ione Call  |   |
| Task Com   |                         |  |   |
| Docume     |                         | nsure that a document does not exceed 5MB in filesize. | E |
|            | Save                    |  |   |

4. You can view your completed tasks in the related <u>property</u>, <u>contact</u> or from your completed tab in the <u>task view</u>

## **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.

| Today's Upcoming Completed Overdue |                    |                     |                                  |   |   |                      |  |
|------------------------------------|--------------------|---------------------|----------------------------------|---|---|----------------------|--|
| Tasks Keyword                      | Search -           | Filter Action - Sea | arch Add                         |   |   |                      |  |
| 🗖 Due                              | Related Contact(s) |                     | Related Property(s)              | Subject   | Description                                 | Action               |  |
| 26/10/2011                         | Jack Black         | 0                   | 52 Elizabeth Street, Surry Hills | Contract Request  | send a copy of the contract                 | Make a Phone<br>Call |  |
| 03/11/2011                         | Thomas Train       | ee R                | 52 Elizabeth Street, Surry Hills | Vendor is going away for<br>3 weeks                                   | hrvis uvisuvhwku wiuhv siuvfh lsifvg<br>lsu | Make a Phone<br>Call |  |
| 04/11/2011                         | Michael Jones      | et R                | 1 Jones Street, Copacabana       | General Enquiry   | Would like to inspect the property          | Make a Phone<br>Call |  |
| 18/11/2011                         | Samantha Jones     | eu Iz               | 1 Jones Street, Copacabana       | Buyer Enquiry - Listing ID<br>#1P0001 - 1 Jones Street,<br>Copacabana | Would like to privately inspect the<br>prop |                      |  |
| 18/11/2011                         | Samantha Jones     | et Z                | 1 Jones Street, Copacabana       | Send letter   | bsrtbsrnsnsrfnfn                            | Create Letter        |  |

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.

| Y Tasks        | Concerning and the second    |  |  |  |                             |              |
|----------------|------------------------------|--|--|--|-----------------------------|--------------|
| oday's Up      | coming Completed Overdue     |  |  |  |                             |              |
| aaks Kanword S | -Filter Action + Sea         | reb Aut  |  |  |                             |              |
| - I            |                              | And the second second                          |  |  | 1                           |              |
| Due            | Related Contact(s)           | Related Property(s)                            | Subject  | Description  | Action                      |              |
| Due            | Related Contact(s) Sam Jones | Related Property(s) 1 Jones Street, Copacabana | Subject<br>Follow up Photographer  | Description<br>Ensure there is a front photo and<br>balcon | Action<br>Make a Phone Call | <del>à</del> |
|                | Sam Jones                    | 1 Jones Street, Copacabana                     | and the second s | Ensure there is a front photo and                          | - CONTRACT.                 | <u>×</u>     |

## **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 Up    | coming Completed Overdue |                                  |   |   |                      |   |
| Tasks Keyword | Search Filter Action -   | Search                           |   |   |                      |   |
| 🗖 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<br>Call | * |
| 03/11/2011    | Thomas Train             | 52 Elizabeth Street, Surry Hills | Vendor is going away for<br>3 weeks                                   | hrvis uvisuvhwku wiuhv siuvfh Isifvg<br>Isu | Make a Phone<br>Call |   |
| 04/11/2011    | Michael Jones            | 1 Jones Street, Copacabana       | General Enquiry   | Would like to inspect the property          | Make a Phone<br>Call |   |
| 18/11/2011    | Samantha Jones           | 1 Jones Street, Copacabana       | Buyer Enquiry - Listing ID<br>#1P0001 - 1 Jones Street,<br>Copacabana | Would like to privately inspect the prop    |                      |   |
| 18/11/2011    | Samantha Jones           | 1 Jones Street, Copacabana       | Send letter   | bsrtbsmsnsrfnfn                             | 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  | ۵ |
|---|---|
| Add Activity Schedule   |   |
| Add Activity Schedule: * Hot Buyer<br>Access Template: By Me Only<br>Save To All Agents |   |
|   |   |

4. Click 'Add Task' to start building your template

| Edit Activity Schedule :: Hot Buyer | 0                  |
|-------------------------------------|--------------------|
| Edit Activity Schedule              |                    |
| Activity Schedule: * Hot Buyer      | ]                  |
| Tasks Involved ::-                  |                    |
| Add Task                            | Copy this Schedule |
| Access Template: To All Agents 🔹    |                    |

5. Enter in the task details and click 'save'

| Edit Activity Ta                    | sk :: Call to build relationship                             | 8   |
|-------------------------------------|--|-----|
| Task Start:<br>Headline: *          | 7 Day(s)  after  Activity Started Call to build relationship | ŕ   |
| Description:                        | Enter the description here                                   |     |
| Responsible Role:                   | Sales Representative   | tt. |
| Select Default Staff<br>(Optional): |  |     |
| Assign Action:                      | bbA 🔊  |     |
| Selected Actions:                   | Create Letter Prospecting Letter [Edit]                      |     |
|                                     |  | τ   |
|                                     | Save   |     |

\*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 : J  | ohn Smith                                  |  |          |          |              |           |                | 8 |
|---------------|--|--|----------|----------|--------------|-----------|----------------|---|
| Staff Details | Staff Photos                               | Access   | Tasks    | Contacts | Properties   | Targets   | Debits/Credits |   |
|               |  |  |          | Enable   | SMS for this | mobile nu | mber           |   |
| Email:*       | john@                                      | agentbox.c                                       | om.au    | ]        |              |           |                |   |
| Home Addres   | 5:   |  |          |          |              |           |                |   |
| Role: *       | Direct                                     |  | <b>F</b> | 1        |              |           |                |   |
| Agent Split % | : Admir<br>Direct                          |  | -        |          |              |           |                |   |
| Website Staff | Profile: Perso<br>Princi<br>Prope<br>Recep | nal Assista<br>pal<br>rty Manage                 | ment     |          |              |           |                |   |
| Show on web   | My<br>My<br>My                             | Listings<br>Open Hom<br>Sold Prope<br>Testimonia | rties 🗧  |          |              |           |                |   |

### Or the role used to assign the agent to a property listing.

| :: Listing : #1P0   | 0001 - 1 Jones Street, Copacabana  | • 8  |
|---|--|------|
| # @ = 0   | 🖗 🍙 🕼 🔛 🗎 🖴 🦄 📶 ج 💩 🛛 Full V   | /iew |
| General For Sale  | Features Open Homes Agents & Contacts Resources Commission   |      |
| :: Assign related Ag<br>Role:<br>Agent:<br>Selected Agents: | Selling Agent     (uncheck to de-select)       Listing Agent     Add       Property Manager     Add       Associate Agent     t)       Selling Agent     t)       Property Assistant     t)       Referral Agent     Add |      |
| Appear on Site:<br>Save                                     | <ul> <li>✓ John Smith (Listing Agent)</li> <li>✓ John Smith (Selling Agent)</li> </ul>   | *    |

This allows the responsible staff member of the task to be drawn from the contact or property you are applying the schedule to rather then 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.

| Edit Activity Schedule :: Hot Buyer                      | 8                  |
|--|--------------------|
| Edit Activity Schedule                                   |                    |
| Activity Schedule: * Hot Buyer                           |                    |
| -:: Tasks Involved ::-                                   | Copy this Schedule |
| Call to build relationship (7 days after Schedule Starts |                    |
| Access Template: To All Agents                           |                    |
|  |                    |
|  |                    |
|  |                    |

7. The new template will now be available in the 'Select Schedule' drop down menu when you <u>apply an</u> <u>activity schedule</u> to a contact or property

## **Apply Activity Schedule**

## How do I apply an Activity Schedule?

- 1. Click apply an activity schedule from your **<u>Property</u>**, <u>**Contact**</u> or the <u>**Task** view</u> 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                                    | y Schedule :                                     |
|--|--|
| Step 1 of 2 - Select                                 | Activity Schedule                                |
| Activity Schedule                                    | Confirm Task Roles                               |
| Select Schedule: *<br>Start Date:<br>Assign Contact: | New Listing  18 11 2011 Add                      |
| Selected Contact(s):                                 |  |
| Assign Property:                                     | Enter a Property Street, Suburb or ID (Optional) |
| Selected Properties                                  | IP0001 - 1 Jones Street, Copacabana              |
|  | Save & Proceed »                                 |
|  |  |

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 Activit      | y Schedule :             |   | 8      |
|-----------------------|--------------------------|---|--------|
| Step 2 of 2 - Confirm | n Allocated Staff        |   |        |
| Activity Schedule     | Confirm Task Roles       |   |        |
| Role:                 |                          |   |        |
| Tasks Involved:       |                          | edule Starts)<br>after Schedule Starts) |        |
| -:: Confirm Allocat   | ed Staff ::              |   |        |
| Allocated Staff: *    | John Smith (Listing Agen | t)                                      |        |
|                       |                          |   |        |
| « 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.

| :: Apply Activit                                    | y Schedule :                                     | 8      |
|---|--|--------|
| Step 2 of 2 - Confir                                | n Allocated Staff                                |        |
| Activity Schedule                                   | Confirm Task Roles                               |        |
| -:: Select Role to I<br>Role:<br>Tasks Involved:    | Admin Send letter (5 days after Schedule Starts) |        |
| -:: Confirm Allocat<br>Staff:<br>Allocated Staff: * | ed Staff ::                                      |        |
| « Previous Step                                     |  | Finish |

5. Once all required Roles has an allocated staff member to assign the tasks to click 'Finish'

## 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.



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.



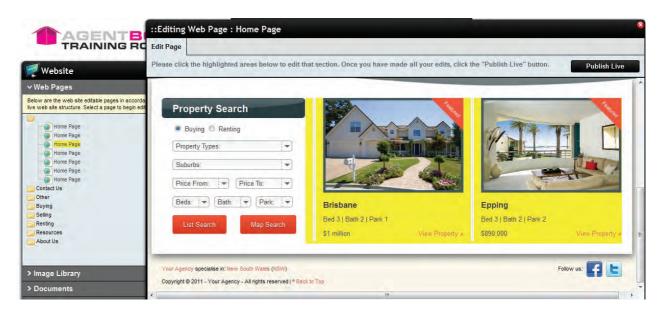
## **Feature Property**

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.

| ::Edit : Featured Properties                        | 8    |
|---|------|
| Assign Property:<br>Enter listing ID or Suburb name | Add  |
| Selected Properties:                                | 1000 |
| ID #1P0001 - 1 Jones Street, Copacabana             |      |
| Save  |      |

4. Preview the changes then click Publish Live to update your website.

## Testimonials

## How do I add/edit testimonials on my website?

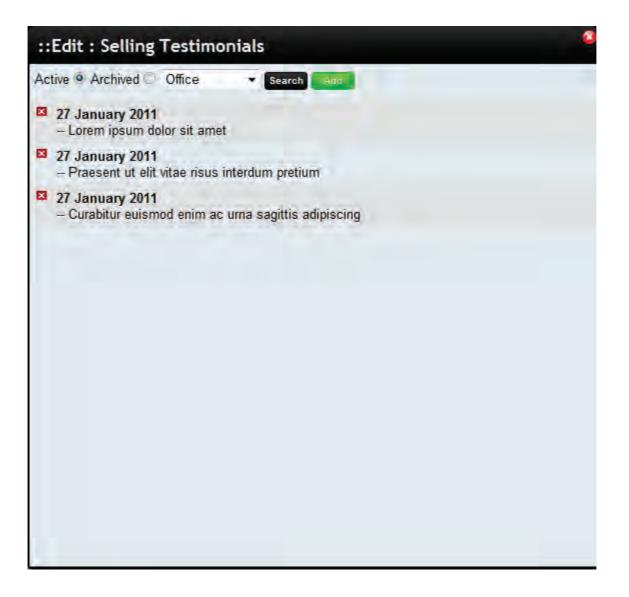
1. Click on Website from the main menu



2. Click on the Home Page from the left panel and the page will open in a centre panel

|                                    |                          |                 |                  |               | the "Publish Liv    |                      | Publish Li    |
|------------------------------------|--------------------------|-----------------|------------------|---------------|---------------------|----------------------|---------------|
|                                    | Home                     | Buying >        | Selling >        | Renting >     | Resources >         | About Us >           | 🔒 Login       |
| YOUR AGENCY                        | -                        |                 |                  |               | Enter a street      | suburb. p/code o     | ID Buy Ren    |
| Testimonials                       |                          |                 |                  |               |                     |                      |               |
| 6 testimonials found - Page 1 of 1 |                          |                 |                  |               |                     |                      | 1             |
|                                    | and with which Christian | carried out the | e sale of our or | rents home wa | s without doubt fir | et clace. It is a re | us quality in |

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.

| Status:       | Active   |
|---------------|--|
| )ate:         | 27 01 2011   |
| Vritten By:   | Michael Jordan   |
| leadline:     | Praesent ut elit vitae risus interdum pretium  |
| Select Agent: | Office 👻   |
|               | a   Q, d) ♥+  < >   <u>A</u> +型+  2  |
|               | professionalism with which Christine carried out the sale of our parents home was witho<br>a rare quality in business to experience costumer service and follow up to such a high<br>Your Agency |
|               |  |
|               |  |
|               |  |

5. Make your changes or enter your testimonial then click save.

6. Preview the changes then click publish live to update the testimonials on your website.

## 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

| Reports                   |  |
|---------------------------|--|
| Y Agent Reports           |  |
| Appraisal Accuracy Report |  |
| Appraisal Report          |  |
| Auction Clearance         |  |
| Performance Report        |  |
| Pipeline Monitor          |  |
| Target Report             |  |
|                           |  |
| > Contact Reports         |  |
| > For Lease Reports       |  |
| > For Sale Reports        |  |
| > General Reports         |  |
| > Stocklist 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.

\_

|   | Carl and a local day of the second         |
|---|---|
| Date Range  |   |
| 01 07 2011  |   |
| 30 06 2012  |   |
| Split Count   |   |
| Office Archived     Office Admin     Jill Jen     Karen Cole     Joanne Coughlan     John Harris     Jane Smith |   |
|   | 01 07 2011<br>30 06 2012<br>Split Count<br>■ Office Admin<br>Karen Cole<br>Joanne Coughlan<br>John Harris<br>Jane Smith |

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.

| View Pipeline Monitor          |  | 9   |
|--------------------------------|--|-----|
| New Search Report Results      | Refine Search                          |     |
| 9 record(s) found. Pipeline Mo | nitor between 01/07/2011 - 30/06/2012. |     |
|                                | Prospect, 3                            | / 1 |
|                                | Appraisal, 7                           |     |
|                                | Presentation, 1                        |     |
|                                | Listed, 20                             | E.  |
|                                | On Market, 10                          |     |
|                                | Sold Unconditional, 4<br>Settled, 3    |     |

7. To view or print a more detailed report click on the 'View Data Detail' action icon

| View Pipelin         | e Monitor     |             |              |                            |        |           |                      | 4      |
|----------------------|---------------|-------------|--------------|----------------------------|--------|-----------|----------------------|--------|
| New Search           | Report Result | ts Refin    | e Search     |                            |        |           |                      |        |
| 9 record(s) found    | d. Pipeline M | lonitor bet | ween 01/07/2 | 2011 - 30/06/2012.         |        | _         | 4 🛱                  | all    |
| Staff                | Prospect      | Appraisal   | Presentation | Cancelled/Missed Appraisal | Listed | On Market | Sold (Unconditional) | Settle |
| Office Admin         | Ō             | Ó           | 0            | 0                          | 0      | Ó         | 0                    | 0      |
| Karen Cole           | 0             | 0           | 0            | 0                          | 0      | Ø         | Ø                    | 0      |
| Joanne Coughlan      | 0             | З           | 0            | 0                          | 9      | 5         | 0                    | ٥      |
| John Harris          | Ó             | 0           | 0            | 0                          | 0      | 0         | Ø                    | D      |
| Jill Jenson          | Ó             | D           | ò            | 0                          | 0      | D         | D                    | a      |
| Jane Smith           | .1            | 4           | 4            | 0                          | 7.5    | 3,5       | 0                    | 0      |
| Melanie Thomas       | 0             | 1           | 0            | 0                          | 4      | 1         | 1                    | ۵      |
| Marcus Thompson      | 0             | 0           | 0            | 0                          | 0,5    | 0,5       | D                    | 0      |
| Joseph Western       | Ó             | Ó           | 0            | 0                          | Ò      | D         | D                    | a      |
| Total Split          | 1             | 5           | 4            | 0                          | 18     | 10        | 1                    | 0      |
| Average Split        | 0.11          | 0.56        | 0.11         | 0                          | 2      | 1.11      | 0.11                 | 0      |
| Unassigned Propertie | is 2          | 2           | ġ            | 0                          | 2      | D         | 3                    | 53     |
| 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 *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 Rep | port : For Sale (Headline   | Only) : New Se   | arch   | 8  |
|---------------|---|------------------|--|----|
| New Search    |   |                  | Saved Reports  |    |
| Туре:         | Residential   | For Sale/Rental: | PT & Auction   | 44 |
| Category:     | Acreage   | Status:          | Appraisal<br>Available<br>Deposit Taken<br>Exchanged | E. |
| State:        | NSW   |                  |  |    |
| Regions:      | Blue Mountains & Surround<br>Canterbury/bankstown<br>Central Coast & Region<br>Central Tablelands | ls               | -  | E  |
| Suburb(s):    | Selected Suburbs:   | (uncheck from be | elow to delete a Suburb)                             | ÷  |

- 5. Click on 'Search'
- 6. The results will appear.

|                 | Report Results   | Refine Search |                |             |           |
|-----------------|--|---------------|----------------|-------------|-----------|
| 3 record(s) fou | und. For Sale (Hea   | dline Only)   |                |             | 2 1       |
| ID              | Address  |               | Assigned Staff | Price       | Status    |
|                 | 1 Jones Street,<br>Copacabana  |               | John Smith     | \$1,250,000 | Available |
|                 | Unit 6/12 Del Rio Drive,<br>Copacabana<br>AUCTION:Thursday, 20/10/2011 |               | John Smith     | \$950.000   | Offline   |
|                 | 52 Elizabeth Street,<br>Surry Hills                                    |               | John Smith     | \$150,000   | Sold      |

refer to Printer Settings.

7. You can now use the action icons 🔬 📄 to export your report as a CSV or Print as HTML. Please

Agentbox 4 Cornwallis Street, Eveleigh NSW 2015 P 02 9209 4174 | F 02 9310 7232 E office@agentbox.com.au W agentbox.com.au 04 April, 2012

### For Sale



### COPACABANA, 1 Jones Street LUXURY BALINESE INSPIRED RESIDENCE

bed 3 bath 4 car 2

bed 3 bath 2 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 view s. Three large bedrooms, all contain en suites and built in w ardrobes, the master features 270 degrees of **Contact Agent** Jane Smith | 040000000



### COPACABANA, Unit 6/12 Del Rio Drive OASIS BY THE SEA

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 w hich leads out through the bi-fold doors onto the Offers over \$960,000 Jane Smith | 040000000



### 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 w hich 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

bed 4 bath 2 car 2

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 \$1.65m il Marcus Thompson



### SYDNEY, 654 Victoria Street LARGE FAMILY HOME

\$2,250,000

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.

Marcus Thompson

Page 1

## 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

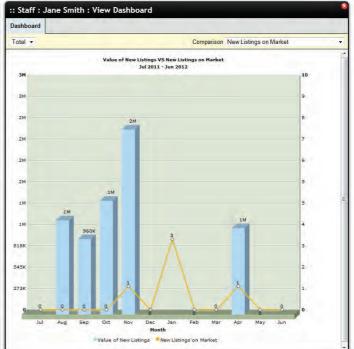


2. Select the financial year and office or relevant staff member from the drop down menus on the left panel.

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

| 2011~2012 • FY •                       |                | Jane Smith     | _    |   |
|--|----------------|----------------|------|---|
|  | Total          | Split          |      |   |
| Gross Commission Target                |                |                | suil |   |
| Gross Commission                       | \$41,125.00    | \$0.00         | uil  |   |
| No. of Listings Target                 |                |                | ail  |   |
| New Listings                           | 9              | 8.5            | sul  |   |
| New Listings on Market                 | ,5             | 4.5            | all  |   |
| Value of New Listings                  | \$7,070,000.00 | \$6,590,000.00 | all  |   |
| Average Listing Value                  | \$785,555.56   | \$732,222.22   | all  |   |
| No. of Sales Target                    |                |                | all  |   |
| Properties Sold                        | 1              | 0              | all  |   |
| Value of Properties Sold               | \$1,645,000.00 | \$0.00         | all  |   |
| Average Sales Value                    | \$1,645,000.00 | \$0.00         | all  |   |
| Average Gross Commission               | \$41,125.00    | \$0.00         | all  |   |
| Average Days on Market (all sold)      | 84             |                | all  |   |
| Average Days on Market (Auctions Only) | 0              |                | all  |   |
| Average Days on Market (PT Only)       | 84             |                | all  | - |
| Auction Day Clearance Rate             | 0%             |                | all  |   |
| Auction Clearance Rate                 | 0%             |                | all  |   |
| Appraisals (Total Volume)              | \$1,450,000.00 |                | all  |   |
| No. of Appraisals                      | 1              |                | ail  |   |
| % of Listed Appraisals                 | 100%           |                | all  |   |
| New Listings (For Lease)               | 1              |                | all  |   |



## **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 <a href="mailto:support@agentbox.com.au">support@agentbox.com.au</a>

- <u>Allhomes</u>
- Campaign Track
- Commercial Real Estate
- <u>Domain</u>
- 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)
- <u>REIWA (Realestate Institute of Western Australia)</u>
- Rent.com.au
- Rentfind.com.au
- (Realestate Publications Australia (repa.com.au, Homes Pictorial, Property Showcase)
- <u>Stayz</u>
- The Homepage & MillonPlus
- Trade Me (New Zealand)

You might also be interested in our <u>REST Professional Integration</u>

### 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.

## campaigntrack<sup>\*</sup>

The world's leading online artwork creation & campaign management solution

### **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

- 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 <a href="http://www.reiwa.com.au">www.reiwa.com.au</a>, please email your account manager or <a href="https://www.reiwa.com.au">support@reiwa.com.au</a> and cc <a href="https://www.reiwa.com">support@reiwa.com.au</a> and cc <a href="https://www.reiwa.com">support@reiwa.com</a> and cc <a href="https://wwww.r

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

### 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

### 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 & MillonPlus

#### 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 *con* 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#1 | P0005 - 33-35 Main Street, Sydney |                          |           | 06                 |
|-------------------|-----------------------------------|--------------------------|-----------|--------------------|
| ₩ @ ■ ⊡           | P 2 3 8 Z                         |                          | 1 2 0     | Full View          |
| General For Lease | Features Open Home                | es Agents & Contacts     | Resources |                    |
| Status:           | Offline                           | ]                        |           |                    |
| For Sale/Rental:  | For Lease                         | ]                        |           | Copy This Property |
| Type: *           | Holiday                           | ]                        |           |                    |
| Category: *       | House                             | ]                        |           | E.                 |
| Property Name:    |                                   | ]                        |           |                    |
| Level No.:        | Unit No.:                         | Street No.:              | 33-35     | 1                  |
| Street Name: *    | Main                              | Street Type: *           | Street    | •                  |
| Suburb: *         | SYDNEY (2000)                     | State: *                 | NSW       | •                  |
| Hide Address?:    | Tick to hide the address          | ss on your web site.     |           |                    |
|                   | Tick to edit address for          | r your web display forma | at.       |                    |
| Address Format:   | 33-35 Main Street                 |                          |           |                    |
| Carela Haen       | -                                 |                          | ·         |                    |
|                   | 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

| Office Detai  | ls   | Edit Details                              |
|---|--|---|
| Your Agency   |  |   |
| [P] 02 9209 4174  |  |   |
| [F] 02 9310 7232  |  |   |
| E] oa@agentbox.co   | om.au  |   |
| [A] 4 Cornwallis Stre   | eet, Eveleigh, NSW                               |   |
| and the first state   | 1. N.B.  |   |
| ✓ Staff Member  | ers  |   |
| Enter a staff membe   |  | below. Your search<br>o search all staff) |
| Enter a staff membe<br>will auto filter your r<br>Roles:          | r's first or last name                           | a state of the state a sector of          |
| Enter a staff membe<br>will auto filter your r<br>Roles:<br>Admin | r's first or last name                           | o search all staff)                       |
| Enter a staff membe<br>will auto filter your r<br>Roles:          | er's first or last name<br>esults. (Type 'ALL' t | a state of the state a sector of          |

3. Click on the Portal Logs tab and select the portal from the Portal drop down menu to view the feed.

| Office Details   | Resources | Portal Experts | Portal Logs      | Menthly income- | Supplier Items |  |
|------------------|-----------|----------------|------------------|-----------------|----------------|--|
| CHIER Deserve    | Ucanares. | Conditionite   | r ontar Logs     | monthly moonie  | Subbuci neine  |  |
| Portal: Realesta | te.com.au |                | 1 2>>            |                 |                |  |
| Export Date      |           | Pro            | cessed Date      |                 | Export Status  |  |
| 13/04/12 12:05pm |           | 13/            | 13/04/12 12:07pm |                 | Processed      |  |
| 12/04/12 12:05pm | n -       | 12/            | 12/04/12 12:06pm |                 | Processed      |  |
| 12/04/12 10:05am | 1. T      | 12/            | 04/12 10:07am    | D               | Processed      |  |
| 11/04/12 04:05pm |           | 11/            | 11/04/12 04:06pm |                 | Processed      |  |
| 11/04/12 03:05pm | £         | 11/            | 04/12 03:06pm    |                 | Processed      |  |
| 06/04/12 02:05pm | i_        | 06/            | 04/12 02:07pm    |                 | Processed      |  |
| 05/04/12 05:05pm | 6_1       | 05/            | 04/12 05:07pm    | 1               | Processed      |  |
| 05/04/12 03:05pm | í.        | 05/            | 04/12 03:07pm    | 11              | Processed      |  |
| 05/04/12 12:05pm | ĥ.        | 05/            | 04/12 12:06pm    | 1.1             | Processed      |  |
| 05/04/12 10:05am | r.        | 05/            | 04/12 10:06am    | 1.              | Processed      |  |
| 04/04/12 09:05pm | 1         | 04/            | 04/12 09:05pm    |                 | Processed      |  |
| 03/04/12 01:05pm | 0         | 03/            | 04/12 01:05pm    |                 | Processed      |  |
| 03/04/12 10:05am | 1         | 03/            | 04/12 10:05am    | T               | Processed      |  |
| 07/02/40 05 05   |           | 07/            | 50 30 0400       |                 | Lum i          |  |

## **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 *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#1P | 20005 - 33-35 Main St         | 0                                     |           |                    |
|--------------------|-------------------------------|---------------------------------------|-----------|--------------------|
| # @ = 0            | P & & P =                     |                                       | 1 2 0     | Full View          |
| General For Lease  | Features Open Homes           | Agents & Contacts                     | Resources |                    |
| Status:            | Offline                       |                                       |           |                    |
| For Sale/Rental:   | For Lease                     |                                       |           | Copy This Property |
| Type: *            | Holiday                       |                                       |           |                    |
| Category: *        | House                         |                                       |           | E                  |
| Property Name:     |                               |                                       |           |                    |
| Level No.:         | Unit No.:                     | Street No.:                           | 33-35     |                    |
| Street Name: *     | Main                          | Street Type: *                        | Street    | T                  |
| Suburb: *          | SYDNEY (2000)                 | State: *                              | NSW       |                    |
| Hide Address?:     | Tick to hide the address      | on your web site.                     |           |                    |
|                    | Tick to edit address for year | our web display forma                 | at.       |                    |
| Address Format:    | 33-35 Main Street             |                                       |           |                    |
| Carela Hann        |                               | · · · · · · · · · · · · · · · · · · · |           |                    |
|                    | Save                          |                                       |           |                    |

2. If you have checked the portal logs and their 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 we bsite and portals as available

**Under Contract** – Property advertised on your we be ite and portals as **under contract** (terminology is customisable on your website)

**Exchanged – Conditional –** Property advertised on your we be site and portals as **under contract** or **exchanged** (terminology is customisable on your website)

**Exchanged – Unconditional** Property advertised on your website and portals as **SOLD – <u>using the</u>** <u>Exchanged date as the 'sold date'</u> **Sold/Settled** –Property remains advertised on your website and portals as **SOLD** 

# **Letter Generator**

## Letter Generator

#### R

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  $\square$  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
  - $_{\odot}$  Add/Edit the text in the template using the formatting tools. (If pasting from Microsoft

Word, please use the paste from word tool in better yet only paste plain text from notepad.)

• Add/edit the <u>variables</u> using the red V icon.

\*Hint - When typing, click shift + enter to proceed on the next line. 'Enter' will make a new paragraph.

| Listing - ID#1P0001  | :: Listing : ID#************************************   |
|--|--|
| a to Properties  | Step 1 of 3 - Select Template  |
| es History<br>ne no Nates receiving at this time.  | General Template Create Letter Template  |
|  | For Stadional Select a Terr Greate Lefter Template   |
|  | Types 1 Category 1 Cat |
|  |  |
|  | Sale Method:<br>Authority  |
| ent Enqueies   | Property flates:   |
| perty History  | Favel No.<br>Street Revol  |
| er Feedback & Vendor Report(0)<br>en Made  | Galaxie *  |
| rracts Requested   | Male, Address IT   |
| perty Modifications Log  | Address Followic Users to Agents:  |
| ks to Portain  | Screeple Mags  |
| p Text   | decem Deanin.  |
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|  | Save & Proceed +   |
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| 5327.17  | - A-2 × × 5101 2 h ×=  |
| the jou an beau a tencilar   | +  |
|  | Variables  |
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| Selec  | ct a variable  |
| Selec  |  |
| Selec<br>AGEN<br>AGEN  | NT MOBILE  |
| Selec<br>AGEN<br>AGEN<br>AGEN  | NT OFFICE  |
| Selec<br>AGEN<br>AGEN<br>AGEN<br>AUCT  | NT OFFICE  |
| Selec<br>AGEN<br>AGEN<br>AGEN<br>AGEN<br>BUYE<br>BUYE  | NT OFFICE  |
| Selec<br>AGEN<br>AGEN<br>AGEN<br>AGEN<br>BUYE<br>BUYE<br>BUYE  | NT OFFICE  |
| Selec<br>AGEN<br>AGEN<br>AGEN<br>AUYE<br>BUYE<br>BUYE<br>BUYE<br>BUYE<br>BUYE  | NT OFFICE  |
| Select<br>AGEN<br>AGEN<br>AGEN<br>AGEN<br>BUYE<br>BUYE<br>BUYE<br>BUYE<br>BUYE<br>BUYE<br>BUYE<br>BUYE   | NT OFFICE<br>NT STAFF JOB TITLE<br>NT STAFF NAME<br>ER ADDRESS<br>ER EMAIL<br>ER MOBILE<br>ER NAME<br>ER PHONE<br>ER SOLICITOR ADDRESS   |
| Select<br>AGEN<br>AGEN<br>AGEN<br>AGEN<br>BUYE<br>BUYE<br>BUYE<br>BUYE<br>BUYE<br>BUYE<br>BUYE<br>BUYE   | NT OFFICE<br>NT STAFF JOB TITLE<br>NT STAFF NAME<br>TIONEER_NAME<br>ER ADDRESS<br>ER EMAIL<br>ER MABILE<br>ER NAME<br>ER PHONE<br>ER SOLICITOR ADDRESS<br>ER SOLICITOR COMPANY   |
| o Agrentice Buve<br>Buve<br>Buve<br>Buve<br>Buve<br>Buve<br>Buve<br>Buve   | NT OFFICE<br>NT STAFF JOB TITLE<br>NT STAFF NAME<br>TIONEER_NAME<br>ER ADDRESS<br>ER ADDRESS<br>ER MANE<br>ER MANE<br>ER NAME<br>ER NAME<br>ER SOLICITOR COMPANY<br>ER SOLICITOR COMPANY<br>ER SOLICITOR FMAIL<br>ER SOLICITOR FMAX  |
| o Agents<br>AGEN<br>AGEN<br>AGEN<br>AGEN<br>AGEN<br>BUYE<br>BUYE<br>BUYE<br>BUYE<br>BUYE<br>BUYE<br>BUYE<br>BUYE<br>BUYE<br>BUYE<br>BUYE<br>BUYE<br>BUYE<br>BUYE | NT OFFICE<br>NT STAFF JOB TITLE<br>NT STAFF NAME<br>TIONEER_NAME<br>ER ADDRESS<br>ER ADDRESS<br>ER MOBILE<br>ER NAME<br>ER SALUTATION<br>ER SALUTATION<br>ER SOLICITOR ADDRESS<br>ER SOLICITOR COMPANY<br>ER SOLICITOR COMPANY   |

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.

| Listing - ID#1P0001   | St Listing : IDF   | Property Letter :: Listing : #1P0001 - Copacabana  |
|---|--|--|
| Back to Properties<br>Notes History   | General Comments   | Step 9 of 3 - Select Template  |
| e de no Nazel incodet al tro bre<br>lacent Enquites<br>ropenty Feature<br>Juger Faedback & Ventor Report[2]<br>Hars Made<br>Jontrants Requested | Notice<br>Trype -<br>Transport<br>Search Benchel<br>Sant Benchel<br>Benchel<br>Benchel<br>Benchel<br>States Benche<br>States Benchel<br>States Benchel | Streads         Create Letter Template           Tangian         Oreas Laws Tangian           Tangian         Densis Laws Tangian           Tangian         Tangian           Stream         Densis Laws Tangian |
| nyany Moothinisiana Lag<br>iau ao Portala<br>Ap Tant  | Andreas Conset<br>Congle May<br>Reg is Property<br>Access Dentity  | Start In Alexan  |

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?

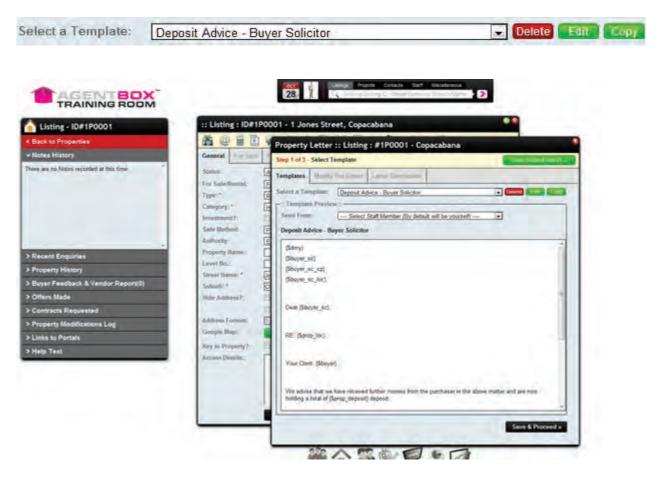
1. Click on the create letter icon  $\bigcirc$  at the top of the contact or property card.



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.

| Statut:       Statut:       Template       Templat                | Listing - ID#1P0001   | :: Listing : ID#1P  | 0001 - 1 Jones Street, Copacabana  |
|--|---|---|--|
| Notes History         Nere are no Notes recorded at this time         Secure         Secure         For Sala/Rental.         Type.*         Category:*         Secure         Property History         Burger Feedback & Vandor Report(0)         Offers Made         Contracts Requested         Property Modifications Log         Links to Portals         Help Text  | Back to Properties  | # @ # E   | Property Letter :: Listing : #1P0001 - Copacabana  |
| Nere are no Notes recorded at this time       Seture:       Templates       Marting The Luttle       Templates         Property Mistory       Seture:       Seture:       Templates       Marting The Luttle       Templates         Recent Enquiries       Property Mistory       Seture:       Templates       Templates       Templates       Templates         Property Mistory       Burger Feedback & Vendor Report(0)       Offers Made       Operations       Needback       Operations       Needback       Needback | Notes History   | General Fee See   |  |
| Recent Enquiries     Dice Terplats       Property History     Earnel Name: Level No.:       Buyer Feedback & Vendor Report(0)     Street Name: *       Offers Made     Suburk. *       Offers Made     Property Delaits       Contracts Requested     Address Format:       Property Modifications Log     Congest Address. Vendor Soliciter       Links to Portals     Key to Property?:       Help Text     Soles Details  | were are no Notes necorded at this time   | For Sala/Rental<br>Type: *<br>Category: **<br>Invotiment?:<br>Sale Method:      | Sohict a Template:  Purchaser Solic te Exchange Letter  Template:  Purchaser Solic te Exchange Letter  Seed From: Vendor Solic te Exchange Letter Vendor Solic te Exchange Letter  Purchaser Sales Adv Vendor Solic te Cromacts Audion  Purchaser Sales Adv Vendor Solic te Request for Contracts Private Tracty |
| Property History     Level No.:     Congret/Jalons - Verdor<br>Contact Exchanged - Bayer<br>Contact Exchanged - Bayer<br>Contact Exchanged - Verdor<br>Suburb. *     E       Buryer Feedback & Vandor Report(0)     Suburb. *     Property Address - Royer Solicitor       Offers Made     Hide Address?;     Property Details       Property Modifications Log     Address Format:<br>Google Marce     Property Address:<br>Sales Advce - New Solicitor       Property Modifications Log     Google Marce     Verdor Solicitor       Links to Portals     Key to Property?;<br>Access Densils.:     Sales Advce - Verdor Solicitor  | Recent Enguines   | Property Name:  | Office Transformer   |
| Help Text Access Details Safe's Details  | Property History<br>Buyer Feedback & Vendor Report(0)<br>Offers Made<br>Contracts Requested<br>Property Modifications Log | Street Name: *<br>Saberk: *<br>Hide Address?;<br>Address Format:<br>Google Map: | Congret/Jacobs - Vendor<br>Contract Exchanged - Bayer<br>Contract Exchanged - Vendor<br>Disposit Advice - Vendor Solicitor<br>Property Details<br>In-House Exchange Letter - Vendor Solicitor<br>Property Address:<br>Sales Advice - Vendor Solicitor<br>Sales Advice - Bayer Solicitor                          |
| Agency: Your Agency Agent:   | Help Text   |   | Sales Details  |
|  |   |   | Agency: Your Agency Agent  |
|  |   |   | 8 X X X X X X X X X X X X X X X X X X X  |

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
- $_{\odot}$  Add/Edit the text in the template using the formatting tools. (if pasting from Microsoft

Word, please use the paste from word tool 🔎 )

 $\circ$  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.

| Notes History General Tel See 1 Select Template  | Listing - ID#1P0001                       | :: Listing : ID#1P0                      | 0001 - 1 Jones Street, Copacabana                         |
|--|---|--|---|
| Products History   Inter are no Names recorded at this time     Recent Enquiries.   Property History   Buyer Feedback & Vendor Report(0)   Potentias   Property Modifications Log   Links to Portalis   Help Text     Series Density:     Series Density:     Series Density:   Property Modifications Log     Links to Portalis     Help Text     Series Density:   | Back to Properties                        | \$ @ F 1                                 | Property Letter :: Listing : #1P0001 - Copacabana         |
| Astance   Astance   Property History   Buyer Feedback & Vendor Report(0)   Offers Made   Property Modifications Log   Links to Portals   Help Text   | Notes History                             | General  = 5                             |   |
| Recent Enquiries     Biski From     Select Staff Member (By default will be yourselt)       Property History     Select Staff Member (By default will be yourselt)       Buyer Feedback & Vendor Report(0)     Select Staff Member (By default will be yourselt)       Buyer Feedback & Vendor Report(0)     Select Staff Member (By default will be yourselt)       Constructs Requested     Heim Adview Fromat:       Property Modifications Log     Google Map:       Links to Portalis     Key to Property?       Heip Text     Key to Property?       We day     Share to Adjerm:   | have are no filoses recorded at this time | For Sale/Rontal:                         |   |
| Recent Enquiries.       Aufwrity:       Edit Letter Template         Property History       Bolyer,       Edit Letter Template         Buyer Feedback & Vendor Report(0)       Stent Hims*       Edit Letter Template         Offers Made       Bolyer,       Template Hame*       Edit Letter Template         Offers Made       Bolyer,       Stent Hims*       Edit Letter Template         Offers Made       Bolyer,       Template Hame*       Edit Letter Template         Offers Made       Bolyer,       Bolyer,       Template Hame*       Edit Letter Template         Offers Made       Bolyer,       Bolyer,       Template Hame*       Edit Letter Template         Property Modifications Log       Address Format:       Bolyer, st., on       Art * * * * * * * * * * * * *         Links to Portalis       Keigt to Property?       Recent Ethews   |   | investment?:                             | Send From Select Staf Member (b) default will be yournell |
| Recent Enquiries     Property History       Property History     Level HoL:       Buyer Feedback & Vendor Report(0)     Saloudr *       Offers Made     Hole Advires 7:       Contracts Requested     Hole Advires 7:       Property Modifications Log     Dear (Ban)       Links to Portalis     Reight Property?:       Help Text     Reight Property?:       Advires Format:     Property Modifications Log       Dear (Ban)     Bowe, Se       Help Text     Your Call   |   |  | Edit Letter Template                                      |
| Property History     Somet Names*     Deport Addee - Baye Solone       Bayer Feedback & Vendor Report(0)     Saturb**     Deport Addee - Baye Solone       Offers Made     Hists Address Formate     Deport Addee - Baye Solone       Contracts Requested     Hists Address Formate     Deport Addee - Baye Solone       Property Modifications Log     Coogle Map:     Townel Address Formate       Links to Portals     Key to Portal     RE (BP       Help Text     Key to Portal     Vor Cle       Ver adde     Ver addee       Wir adde     Share to Agents   | Recent Enquiries                          |  | Edit Lefter Template                                      |
| Buyer Feedback & Vendor Report(0) Offers Made Offers Made Contracts Requested Property Modifications Log Links to Portais Help Text Vor Ce Vir edw Vir edw Vir edw Vir edw Share to Agerm 2  | Property History                          |  |   |
| Contracts Requested Contracts Requested Congle Map: Coogle Map: Co | Buyer Feedback & Vendor Report(0)         |  | C   |
| Contractor requested     Address Format:     II       Property Modifications Log     Google Map:     II       Links to Portalis     Key in Property?:     II       Key in Property?:     II       Rocens Details:     Your Cie       Wir adva     Share to Agents:       Share to Agents:     II   | Offers Made                               | Hids Address 7.                          |   |
| Property Modifications Log     Address Komatic     I       Links to Portails     Google Rap:     Blow JR_JR       Help Text     Key to Property?:     Blow JR_JR       Access Details:     Your Call       Wire adve     Deer Blow JR_JR       Share to Agerm:     Pl  | Contracts Requested                       | 1. |   |
| Unks to Porpais Help Text Key in Property?: Access Details.: Your Cle Vir idex Share to Agents: T  | Property Modifications Log                | Construction of the second               |   |
| Adap Text Access Details. Your Cie Vie dow We dow Share bi Agents: 71  | Links to Portais                          |  | RE (\$94 Heave_st_)ed                                     |
| holding a  | Help Text                                 |  | Your Clear Deer Thoreand                                  |
|  |   |  | holding a   |

- 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.

| Listing - ID#1P0001                      |                                      | 0001 - 1 Jones Street, Copacabana                        |                    |
|--|--------------------------------------|--|--------------------|
| C Back to Properties                     | 36 @ B B                             | Property Letter :: Listing : #1P0001 - Copacabana        |                    |
| v Notes History                          | General the sale                     | Step 1 of 3 Select Template                              | Contractory (1971) |
| Daire are no Notes recorded at this time | Status:                              | Templates State, The Law Transmission                    |                    |
|  |                                      | Selici a Template: Parchase Sales Adece                  |                    |
|  | Type"                                | P - Tringlate Preview -                                  |                    |
|  | huvantroim/7                         | Send From: Sales Staf Mander (b) defait will be unvesti- | -                  |
|  | Sale Mallock                         | Purchaser Sales Advice                                   |                    |
|  | Automy                               | Your Agency  | - E                |
| > Recent Enquiries                       | Property Hame:                       | ACCELUNT BOX: A Community Street, Buderige, ASW 2015     |                    |
| > Property History                       | Local Rec.                           | Fine: 02.0010 7252-<br>Email: 60036emBox.com.au          |                    |
| > Buyer Feedback & Vendor Report(0)      | Suberti: *                           | Alle: 11.222.112.142                                     |                    |
| > Offers Made                            | Title Admins?                        | Property Details   |                    |
| > Contracts Requested                    |                                      | Property Address: (Sprop. Sc)                            |                    |
| Property Modifications Log               | Address Format                       | Contract Price: (Sold price)                             | Deposit Held:      |
| > Links to Portals                       | Google Man                           |  |                    |
| > Help Text                              | Key to Property?<br>Access Details.: |  |                    |
|  | inclusion particular                 | Sales Details  |                    |
|  |                                      | Adverge Your Adverge                                     | Apent              |
|  | 1                                    |  |                    |
|  |                                      | U.   | 1                  |

2. Click on the Select A Template drop down menu at the top of the panel and choose the template you would like to modify.

| Listing - ID#1P0001                     | :: Listing : ID#1P           | 001 - 1 Jones Street, Copacabana   |                                   |
|---|------------------------------|--|-----------------------------------|
| Back to Properties                      | ***                          | Property Letter :: Listing : #1P0001 - Cop   | acabana                           |
| v Notes History                         | General                      | Step 1 of 3 - Select Template  |                                   |
| here are no Notes recorded at this time | Stature                      |  |                                   |
| and the second second                   | For Sale/Rental              | Templates Multip True Lotting Lotting prototoning  |                                   |
|   | Type:*                       | Select a Template: Purchaser Sales Advice<br>Purchaser Solicitor Exchange Lette                |                                   |
|   | Category:"                   | Vendor Exchange Letter   |                                   |
|   | Investment2:                 | Send From Vendor Settlement Letter<br>Vendor Solicitor Exchange Letter                         |                                   |
|   | Sale Method:                 | Purchaser Sales Adv Vendor Solicitor Request for Contra<br>Vendor Solicitor Request for Contra | cts Auction<br>cts Private Treaty |
|   | Authority:                   | Vendor Thankyou for Listing Letter   |                                   |
| Recent Enquiries                        | Property Name:               | Congratulations - Buyer<br>Congratulations - Vendor  |                                   |
| Property History                        | Level No.:<br>Street Name: * | Contract Exchanged - Buyer   |                                   |
| Buyer Feedback & Vandor Report(0)       | Subarb: *                    | Deposit Advice - Buyer Solicitor   |                                   |
| Offers Made                             | Hide Address?                | Property Details In-House Exchange Letter - Buyer  | Soletary                          |
| Contracts Requested                     |                              | In-House Exchange Letter - Vendor<br>Protect Fee Letter - Vendor Solicit                       | Soleta                            |
| Property Modifications Log              | Address Format:              | Property Address: Sales Advice - Buyer Solicitor   |                                   |
| Links to Portals                        | Google Map:                  | Constract Price: Sales Advice - Vendor Salicitor<br>Create New Letter                          | Template - Deposit Held:          |
|   | Key to Property?:            |  |                                   |
| Help Text                               | Access Details :             | Sales Details  |                                   |
|   |                              | Agency: Your Agency  | Agent                             |
|   |                              |  | -                                 |
|   |                              |  |                                   |
|   |                              | 1 A.   | Save & Proceed +                  |

3. You will now be able to click a green Edit button to the right of the Select a Template drop down menu.

| Select a Template: | Deposit Advice - Buyer Solicitor | Delete | Edit | Copy |
|--------------------|----------------------------------|--------|------|------|
|                    |                                  |        |      |      |

| Listing - ID#1P0001                     | :: Listing : ID#1P                   | 0001 - 1 Jones Street, Copacabana   |
|---|--------------------------------------|---|
| Back to Properties                      |                                      | Property Letter :: Listing : #1P0001 - Copacabana   |
| Viotes History                          | General I = Lun                      | Step 1 of 3 - Select Template   |
| here are no Notes recorded at this time | Status                               | A Templates, There, Textures, Land Land   |
|   | For Sala/Rental:<br>Type:**          | E Seloct a Tomphane: [Depose Advice - Boyler Solicitor (+) Constant (+)   |
|   | Category.*                           | Templane Proview     Send From  |
|   |                                      | E Deposit Advice - Buyer Solicitor  |
|   | Anthonty:<br>Property Name:          | (jidmy)   |
| Recent Enquiries                        | Level No.:                           | = (\$ku/w_st)   |
| Property History                        | Street Name: *                       | (\$60;ym_sc_cs)<br>(\$60;ym_sc_ks)  |
| Buyer Feedback & Vendor Report(0)       | Suburb: *                            |   |
| Offers Made                             | Hide Address?:                       |   |
| Contracts Requested                     | Sugar A                              | Cear (Sbuyer_sc).   |
| Property Modifications Log              | Address Formitti<br>Geogle Blap:     |   |
| Links to Portals                        |                                      | RE (Sprop_loc)  |
| Help Text                               | Ney to Property?<br>Access Details : | Your Clent: (Sbuyer)  |
|   |                                      | We advise that we have received jurther mones iron the purchaser in the above matter and are non-<br>holding a total of [print, deposit] deposit. |

- 4. The Edit Letter Template window will appear which allows you to make alterations to:
  - $_{\odot}$  Rename the template
  - $_{\odot}$  Add/Edit the text in the template using the formatting tools. (if pasting from Microsoft

Word, please use the paste from word tool 🛅 )

 $_{\odot}$  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 recently modified template can be selected from the drop down list.

## Delete a Letter Template

### How do I delete a letter template?

1. Click on the create letter icon at the top of the contact or property card. The Letter panel will pop-up.

| Listing - ID#1P0001                      | :: Listing : ID#1P | 0001 - 1 Jones Street, Copacabana                          | ••               |
|--|--------------------|--|------------------|
| C Back to Properties                     | 8 0 6 D            | Property Letter :: Listing : #1P0001 - Copacabana          |                  |
| v Notes History                          | General IVo sub    | Step 1 of 3 Select Template                                | Contract Cont    |
| There are no Notes recorded at this time | Status:            |  | Cited Star Land  |
|  | For Sala/Renal     | Templates Marry Deckman Press Contractor                   |                  |
|  | Type-              | E Seldci a Template: Perchase Sales Adace                  |                  |
|  | Category:          | A Template Protein   |                  |
|  | hiv/antro-ant7     |  |                  |
|  | Sale Mathed        | Purchaser Sales Advice                                     |                  |
|  | Property Name:     | Your Agency<br>A Contract Digest State, Eveloger, NSW 2015 |                  |
| > Recent Enquiries                       | Lavend Bicc        | Plade: 02 9208-4174.<br>Fax: 02 9310 7232                  |                  |
| > Property History                       |                    | Email: Codjagention.com.au                                 | 1                |
| Buyer Feedback & Vendor Report(0)        |                    |  | _                |
| > Offers Made                            | Title Admins?      | Property Details   |                  |
| > Contracts Requested                    | Address Format     | Property Address: (Sprop_loc)                              |                  |
| Property Modifications Log               | Google Man         | Contract Price: (Stold_price)                              | Deponit Held:    |
| > Links to Portals                       | Key to Property?   |  |                  |
| > Help Text                              | Arcess Details.:   | Sales Details  |                  |
|  |                    | Apency: Your Apency  | Ajest            |
|  |                    |  |                  |
|  |                    |  | -                |
|  |                    |  | Save & Proceed a |

2. Click on the Select A Template drop down menu at the top of the panel and choose the template you would like to delete.

| Listing - ID#1P0001   | :: Listing : ID#1  | 20001 - 1 Jones Street, Copacabana  |             |
|---|--|---|-------------|
| Back to Properties  | ***  | Property Letter :: Listing : #1P0001 - Copacabana   |             |
| Notes History   | General  |   | 10          |
| ere ars no Notes necarded at this time.   | Sation<br>For SalarRental<br>Type: *<br>Category: *<br>Investment?<br>Sale Method:<br>Authority                    | A         Templates         Multiry, The Lumin         Multir  |             |
| Recent Enguiries  | Property Name:   | Office Templates  | 1           |
| Property History<br>Buyer Feedback & Vandor Report(0)<br>Offers Made<br>Contracts Requested<br>Property Modifications Log<br>Links to Portals | Level No.:<br>Street Name: *<br>Suburb: *<br>Hide Address?:<br>Address Format:<br>Google Map:<br>Key to Property?: | Congratulations - Vender Contract Exchanged - Buyer Contract Exchanged - Vender Contract Exchanged - Vender Property Details In-House Exchange Letter - Vender Soliciter In-House Exchange Letter - Vender Soliciter Property Address: Property Address: Distribution - Duyer Soliciter Distribution Distributi | st Hole:    |
| Help Text   | Access Details :   | Sales Details   |             |
|   |  | Agency: Your Agency Agency  |             |
|   |  | 4   | +           |
|   | 10.000   |   | e & Proceed |

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.

| tob i oi a           | - Select | Template  | View created letters = |
|----------------------|----------|---|------------------------|
| emplates             | Modif    | Delete Letter Template                          |                        |
| elect a Te           | te Previ | Are you sure your want to delete this template? | Delete Edit Copy       |
| Send From            |          | Yes No  |                        |
| {\$dmy}              |          |   |                        |
| {Sbuyer}<br>{Sbuyer_ | loc}     |   |                        |
|                      |          |   | 7.                     |

## **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.

| Stack to Property         • Notes History         Deres are no Notes excluded at this time         • Status:         • Property Letter :: Listing : #1P0001 - Copacabana         • Status:         • Finiphane         • Property Letter :: Listing : #1P0001 - Copacabana         • Status:         • Finiphane         • Property Letter :: Listing : #1P0001 - Copacabana         • Status:         • Finiphane         • Property Letter :: Listing : #1P0001 - Copacabana         • Status:         • Finiphane         • Property Letter :: Listing : #1P0001 - Copacabana         • Status:         • Finiphane         • Property Letter :: Listing : #1P0001 - Copacabana         • Status:         • Status:         • Finiphane         • Others Roade         • Property History         • Differer Made         • Dorers Made         • Property Hame:         • Level Hos:         • Stevel: *         • Stevel: *         • Stevel: *         • Hield Address?;         • Hower Two Level Voide Status         • Hield Address?;         • Hower Two Level Voide Status         • Doperty Moteres  | Listing - ID#1P0001   | :: Listing : ID#1P  | 20001 - 1 Jones Street, Copacabana   |    |
|---|---|---|--|----|
| Several History         There are no Notes recorded at this time         Status:         For Sala/Rental:         Type:/         Category:*         Status:         Property Mistory         Status:         Property History         Status:         Property Mistory         Status:         Property Mase:         Level No:         Status:         Status:         Property Mistory         Status:   | < Back to Properties  | ***   | Property Letter :: Listing : #1P0001 - Conacabana  |    |
| Derive are no Notes recorded at this time         Settine:         Project SalarRental.         Type:         Settine:         Project SalarRental.         Type:         Salar Rental.         Salar Rental.         Salar Rental.         Salar Rental.         Salar Rental.         Property Marks         Salar Rental.         Property Marks         Salar Rental.         Salar Rental.         Property Marks <tr< td=""><td>V Notes History</td><td>General</td><td></td><td>-</td></tr<>   | V Notes History   | General   |  | -  |
| > Property History     Property History       > Event History     Street Name: Level Hist       > Buyer Feedback & Vandor Report(0)       > Offers Made       > Offers Made       > Contracts Requested       > Property Modifications Log       > Links to Portals       > Help Text   | There are no Tibles recorded at this time   | For Sala/Rantal<br>Type: *<br>Eategory: **<br>Investment?:<br>Sale Method:                                      | Strikt in Fernghale:     Purchaser Solicitie Exchange Letter     There is a strike the solicitie Exchange Letter     Send From:     Vendor Solicitie Exchange Letter     Vendor Solicitie Exchange Letter     Vendor Solicitie Exchange Letter     Vendor Solicitie Request for Contracts Audion     Vendor Solicitie Request for Contracts Audion |    |
| Property Mistory     Degree Address Vendor Report(0)     Degree Address Vendor Report(0)     Offers Made     Degree Address 7:     Property Modifications Log     Contract Requested     Address Format:     Google Map:     Help Text     Access Destils:     Sales Details  | Recent Enquiries  |   | Office Transformer   | 1  |
| Contracts Requested     Contract Requested     Contracts Requested     Contract Requested     Con | > Property History  | Street Name: *  | Congratulations - Verdor<br>Contract Exchanged - Buyer<br>Contract Exchanged - Verdor<br>Contract Exchanged - Verdor   |    |
| Property Modifications Log     Address Format:     Google Map:     Key to Property Address:     Sales Advice - Buyer Soliciter     Contract Price:     Sales Advice - Buyer Soliciter     Contract Price:     Contract Price: | - Here & Garrow   | Hide Address?;  | Property Details In-House Exchange Letter - Buyer Solicitor<br>In-House Exchange Letter - Vendor Solicitor<br>Detail Exchange Letter - Vendor Solicitor  |    |
| > Help Text Kay to Property?: Access Details: Sales Details   |   |   | Construct Price: Sales Advice - Vendor Solicitor   |    |
| Agency: Your Agency Agent:  | and the second se | the second se | Sales Details  | d. |
|   |   |   | Agency: Your Agency Agency   |    |
|   |   |   |  | 1  |

3. 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. By ticking the Share to Agents template all staff will be able to access the template.



5. 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**

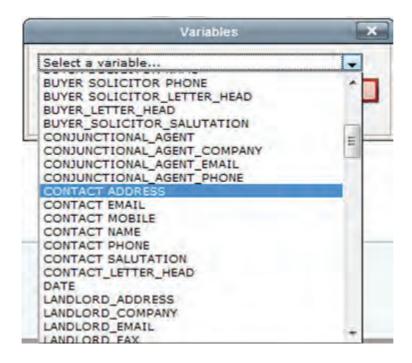
#### How do I conduct a mail merge to a group of contacts?

- 1. You will firstly need to create, copy or edit a letter template
  - O Create a Letter Template
  - O Copy a Letter Template
  - o Edit a Letter Template

Hints

- If the mail merge is going to all Vendor's then the Vendor <u>Variables</u> 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 <u>variables</u>



2. Click on Contacts from the main menu



3. Click Advanced Search on the left panel

| <ul> <li>Fast Find</li> </ul> |   |
|-------------------------------|---|
|                               | I auto filter your results<br>much info you enter below |
| First Name:                   |   |
| Last Name:                    |   |
| Company:                      |   |
|                               | Advanced Search   |

- 4. Complete an <u>Advanced Contact Search</u> to generate your list of recipients.
- 5. Click the letter icon at the top of your search results.

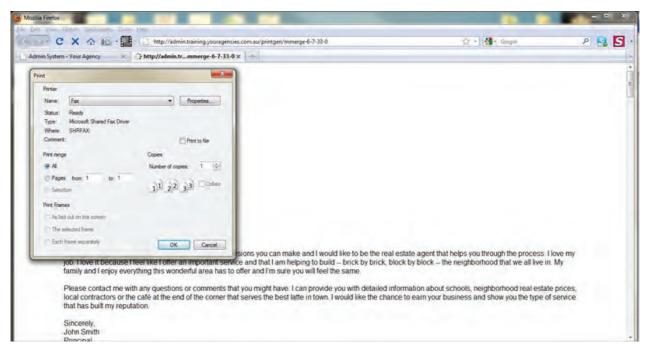
| New Search     | Search Results | Refine Search  |                |              |
|----------------|----------------|----------------|----------------|--------------|
| Sort By: Conta | act Name: A-Z  | -              |                |              |
| Contact        |                | Assigned Staff | Last Contacted | Contact Info |
| Jack Black     | -              | John Smith     |                | 012          |
| Andrew Brown   | 9.4            | John Smith     |                | @ CE Z       |
| Michael Jones  |                | John Smith     |                | @ CEIZ       |
| Sam Jones      |                | John Smith     |                | @ MAIZ       |
| Samantha Jon   | es             | John Smith     |                | 0 CER        |
| Mary May       |                | John Smith     | 19/08/11       | e IIIZ       |
| Jane Smith     |                | John Smith     |                | GZ           |
| Agentbox Supp  | troc           | John Smith     |                | 012          |
| Thomas Train   |                | John Smith     | 26/10/11       | QEZ          |

- 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.

| :: Advanced Conta       | act Search : Search R | Results(42 contacts four             | ad) 🧕          |
|-------------------------|-----------------------|--------------------------------------|----------------|
| New Search Search       | Results Refine Search |                                      | Saved Searches |
| Sort By: Contact Last N | ame: A-Z              | <u>2</u>  »                          |                |
| Contact                 | Assigned Staff        | Last Contacted                       | Contact Info   |
| Apex Printing           | Print Mail            | Merge                                |                |
| Ozlemx Aydogan          |                       |                                      |                |
| James Barnett           | Select Templ          | ate:<br>bel Templates 🔻              |                |
| Stewart Berry           | On Behalf Of:         |                                      | 120 14 -       |
| Jack Black              |                       | taff (by default will be yourself) 💌 | 120            |
| Belinda Brennan         | Print Can             | cel                                  |                |
| Brod Brennan            |                       |                                      |                |
| Pat Brennan             | Joanne Coughlan       |                                      |                |
| Gary Brown              | Jane Smith            |                                      |                |
| Julia Burn              | Jane Smith            | 14/02/12 (letter)                    |                |
| Nick Citizen            | Jane Smith            |                                      | 1200 -         |

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 <u>print settings</u>



## **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

- o Create a Letter Template
- Copy a Letter Template
- o 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 <u>Variable</u> 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 <u>Variables</u>

- {\$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.

| Vanables                |     |
|-------------------------|-----|
| RESIDENT_ADDRESS        |     |
| PURCHASER ADDRESS       | ×.  |
| PURCHASER EMAIL         | 1.1 |
| PURCHASER MOBILE        |     |
| PURCHASER NAME          |     |
| PURCHASER PHONE         |     |
| PURCHASER SALUTATION    |     |
| PURCHASER_LETTER_HEAD   |     |
| RESIDENT_ADDRESS        |     |
| RESIDENT_COMPANY        |     |
| RESIDENT_EMAIL          |     |
| RESIDENT_FAX            |     |
| RESIDENT_LETTER_HEAD    |     |
| RESIDENT_MOBILE         |     |
| RESIDENT_NAME           | -   |
| RESIDENT_PHONE          | E   |
| RESIDENT_SALUTATION     |     |
| SELLING AGENT           |     |
| SELLING AGENT EMAIL     |     |
| SELLING AGENT JOB TITLE |     |
| SELLING AGENT MOBILE    | (*) |

2. Click on the Property icon from the main menu



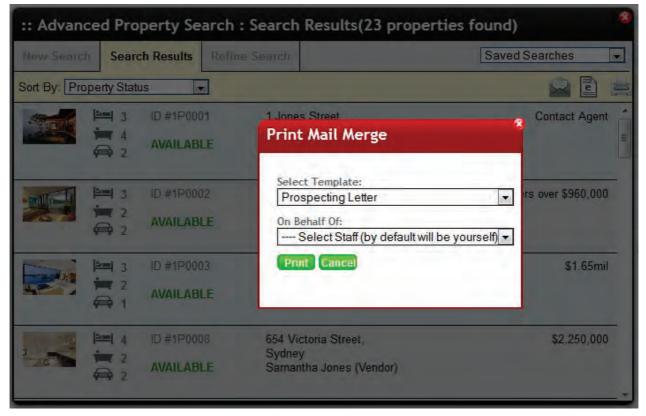
3. Click on Advanced Search from Left Panel

| 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: Image: Constraint of the second sec |
| <ul> <li>Add a Property</li> </ul>   |
| <ul> <li>Add a Project / Development</li> </ul>  |
| <ul> <li>Add an Appraisal / Prospect Property</li> </ul>   |

- 4. Complete an <u>Advanced Property Search</u> to generate your list of recipients.
- 5. Click the letter icon at the top of your search results.

| New Search     | Search Results | Refine Search | Saved Searches              |
|----------------|----------------|---------------|-----------------------------|
| Sort By: Prope | erty Status    |               | 🗟 🖻                         |
|                | 4 AVAILAB      | Copacabana    | Contact Agent<br>r) Max     |
|                | 2 AVAILAB      | Copacabana    | Offers over \$960,000<br>r) |
|                | 2 AVAILAB      | Surry Hills   | \$1.65mil                   |
|                | 4 ID #1P000    | Sydney        | \$2,250,000<br>r)           |

- 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 <u>print settings</u>

| nt  | ×                                |   |
|---|----------------------------------|---|
| Printer   |                                  |   |
| Name: Brother HL-3040CN series (Copy  | 1)   Properties                  |   |
| Status: Ready   |                                  |   |
| Type: Brother HL-3040CN series  |                                  |   |
| Where: IP_192.168.0.245<br>Comment:   | Print to file                    |   |
|   |                                  |   |
| Print range   | Copies                           |   |
| All   | Number of copies: 1              |   |
| Pages from: 1 to: 1   | 1 2 3 3 Colate                   |   |
| Selection   | 1 2 2 3 3                        |   |
|   | OK Cancel                        |   |
|   | UK Caricel                       |   |
|   |                                  |   |
| the second s        |                                  |   |
|   | ]                                |   |
|   |                                  |   |
| Dens les  |                                  |   |
| Dear Joe  |                                  |   |
| Dear Joe  |                                  |   |
|   |                                  |   |
|   | n in your area at 18 Matthew St  | eet, Sydney. The auction result may provide you with up to date information as property values in your area.  |
|   | in your area at 18 Matthew St    | eet, Sydney. The auction result may provide you with up to date information as property values in your area.  |
| An auction is taking place  |                                  |   |
| An auction is taking place  |                                  | eet, Sydney. The auction result may provide you with up to date information as property values in your area.<br>I are interested in attending the auction or would like to receive some information about the auction or property market. |
| An auction is taking place<br>You will be contacted ove   | r the next few days to see if yo |   |
| An auction is taking place<br>You will be contacted ove   |                                  |   |
| An auction is taking place<br>You will be contacted ove   | r the next few days to see if yo |   |
| An auction is taking place<br>You will be contacted ove<br>Hook forward to meeting                                    | r the next few days to see if yo |   |
| An auction is taking place<br>You will be contacted ove   | r the next few days to see if yo |   |
| An auction is taking place<br>You will be contacted ove<br>Hook forward to meeting                                    | r the next few days to see if yo |   |
| An auction is taking place<br>You will be contacted ove<br>Hook forward to meeting<br>Yours faithfully,               | r the next few days to see if yo |   |
| An auction is taking place<br>You will be contacted ove<br>Hook forward to meeting<br>Yours faithfully,<br>Jane Smith | r the next few days to see if yo |   |
| An auction is taking place<br>You will be contacted ove<br>I look forward to meeting<br>Yours faithfully,             | r the next few days to see if yo |   |

#### 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 <u>advanced</u> <u>contact search</u>, <u>advanced property search</u> or opening any target list e.g. Inspection <u>Viewers</u> of a property etc
- 2. Click on the Print Mail Merge icon at the top of the target list.

| New Search     | Search Results          | Refine Search | Saved Searches |
|----------------|-------------------------|---------------|----------------|
| Sort By: Prope | erty Status             | 3             |                |
|                | 4 AVAILAB               | Copacabana    | Contact Agent  |
|                | 2 AVAILAB               | Copacabana    |                |
|                | 4 ID #1P00<br>2 AVAILAB | Sydney        | \$2,250,000    |
|                | 2 ID #1P00.             | Manly         |                |

3. Select Avery Label Templates from the Select Template drop down.



4. A new drop down menu will appear, select a label template

| Print Mail Merge                     |      |
|--------------------------------------|------|
| Select Template:                     |      |
| Avery Label Templates                | 1    |
| Select Type:                         |      |
| L7159 (64 x 33.8) 3 columns 8 rows   | -    |
| L7159 (64 x 33.8) 3 columns 8 rows   |      |
| L7160 (63.5 x 38.1) 3 columns 7 rows |      |
| L7161 (63.5 x 46.6) 3 columns 6 rows |      |
| L7162 (99.1 x 34) 2 columns 8 rows   | 10.1 |
| L7163 (99.1 x 38.1) 2 columns 7 rows | -    |

5. Click Print to generate your labels as a PDF document

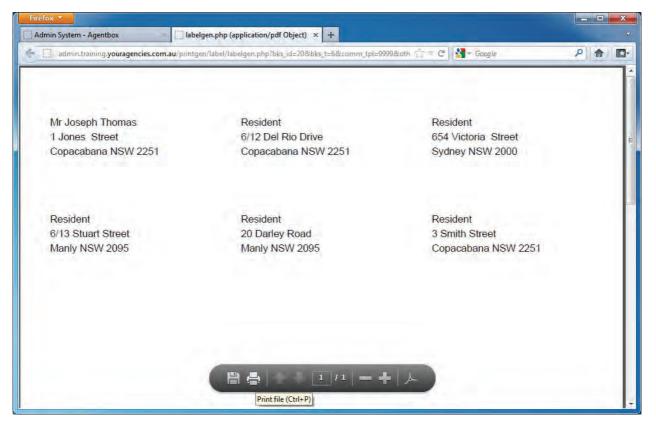
| Print Mail Merge                   |   |
|------------------------------------|---|
| Select Template:                   |   |
| Avery Label Templates              | ۲ |
| Select Type:                       |   |
| L7159 (64 x 33.8) 3 columns 8 rows | * |
| Print Cancel                       |   |
|                                    |   |
|                                    |   |

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 <u>group of contacts</u> 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 <u>postal</u> <u>address</u> (if one exists), else Title, First Name, Last Name, Company Name and <u>residential address</u>.



## 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 lett |
| 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}                                  | #V EN DO R_A DD RESS#                           |  |
| {\$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}                                | #DEV ELOPER_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  h}                               | #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  h}                                   | #TENANT_LETTER_HEAD#                            |  |
| {\$tenant loc}                                  | #TENANT ADDRESS#                                |  |
|   | ———————————————————————————————————————         |  |
|   |   |  |
| {\$tenant_loc}<br>{\$tenant_fx}<br>{\$landlord} | #TENANT_ADDRESS#<br>#TENANT_FAX#<br>#LAN DLORD# |  |

| {\$landlord_fn}                      | #LANDLORD FIRSTNAME#                         | I |
|--------------------------------------|--|---|
| {\$landlord_sn}                      | #LANDLORD_FIRSTNAME#                         |   |
| {\$landlord_sn}<br>{\$landlord_cp}   | #LAN DLORD_SORNAME#<br>#LAN DLORD_COMPANY#   |   |
| {\$landlord_cp}<br>{\$landlord_dear} | #LANDLORD_COMPANY#<br>#LANDLORD_SALUTATION#  |   |
| {\$landlord_dear}                    | #LANDLORD_SALUTATION#<br>#LANDLORD_PHONE#    |   |
| {\$landlord_pn}<br>{\$landlord_mo}   | #LANDLORD MOBILE#                            |   |
| {\$landlord_mo}                      | #LANDLORD_MOBILE#<br>#LANDLORD_EMAIL#        |   |
| {\$landlord_em}                      | #LANDLORD_EMAIL#                             |   |
| {\$landlord_ln}<br>{\$landlord_loc}  | #LANDLORD_LETTER_HEAD#<br>#LANDLORD_ADDRESS# |   |
| {\$landlord_loc}<br>{\$landlord_fx}  | #LAN DLORD_ADDRESS#<br>#LAN DLORD_FAX#       |   |
| {\$investor}                         | #LANDLORD_FAX#<br>#INVESTOR#                 |   |
| {\$investor}<br>{\$investor fn}      | #INVESTOR FIRSTNAME#                         |   |
| {\$investor_tn}<br>{\$investor_sn}   | #INVESTOR_FIRSTNAME#<br>#INVESTOR_SURNAME#   |   |
| {\$investor_sn}<br>{\$investor_cp}   | #INVESTOR_SORNAME#<br>#INVESTOR_COMPANY#     |   |
| {\$investor_cp}<br>{\$investor_dear} |  |   |
| {\$investor_dear}<br>{\$investor_ph} | #INVESTOR_SALUTATION#<br>#INVESTOR PHONE#    |   |
| {\$investor_pn}<br>{\$investor_mo}   | #INVESTOR_PHONE#<br>#INVESTOR_MOBILE#        |   |
| {\$investor_mo}<br>{\$investor_em}   | #INVESTOR_MOBILE#                            |   |
| {\$investor_em}<br>{\$investor  h}   |  |   |
| {\$investor_In}<br>{\$investor loc}  | #INVESTOR_LETTER_HEAD#                       |   |
|                                      | #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#  | 1            |
|--|---|--------------|
| {\$tradesperson_mo}                                  | #TRADESPERSON MOBILE#   | t            |
| {\$tradesperson_em}                                  | #TRADESPERSON_MOBILE#   | t            |
| {\$tradesperson  h}                                  | #TRADESPERSON_LETTER HEAD#                                      | t            |
| {\$tradesperson_in}                                  | #TRADESPERSON_LETTER_HEAD#                                      | <u>+</u>     |
| {\$tradesperson_fx}                                  | #TRADESPERSON_ADDRESS#<br>#TRADESPERSON_FAX#                    | t            |
| {\$supplier}   | #IRADESPERSON_FAX#<br>#SUPPLIER#                                | <del> </del> |
| {\$supplier}<br>{\$supplier_fn}                      | #SUPPLIER#<br>#SUPPLIER_FIRSTNAME#                              | <del> </del> |
| {\$supplier_tn}<br>{\$supplier_sn}                   |   | <del> </del> |
|  | #SUPPLIER_SURNAME#  | <u> </u>     |
| {\$supplier_cp}<br>{\$supplier_dear}                 | #SUPPLIER_COMPANY#  | 1            |
|  | #SUPPLIER_SALUTATION#   | 1            |
| {\$supplier_ph}                                      | #SUPPLIER_PHONE#  | <u> </u>     |
| {\$supplier_mo}                                      | #SUPPLIER_MOBILE#   | <u> </u>     |
| {\$supplier_em}                                      | #SUPPLIER_EMAIL#  | <u> </u>     |
| {\$supplier_lh}                                      | #SUPPLIER_LETTER_HEAD#  | <u> </u>     |
| {\$supplier_loc}                                     | #SUPPLIER_ADDRESS#  | <del> </del> |
| {\$supplier_fx}                                      | #SUPPLIER_FAX#  | <del> </del> |
| {\$conjunctional_agent}                              | #CONJUNCTIONAL_AGENT#   | <u> </u>     |
| {\$conjunctional_agent_fn}                           | #CONJUNCTIONAL_AGENT_FIRSTNAME#                                 | <u> </u>     |
| {\$conjunctional_agent_sn}                           | #CONJUNCTIONAL_AGENT_SURNAME#                                   | <u> </u>     |
| {\$conjunctional_agent_cp}                           | #CONJUNCTIONAL_AGENT_COMPANY#                                   | <u> </u>     |
| {\$conjunctional_agent_dear}                         | #CONJUNCTIONAL_AGENT_SALUTATION#                                | <b> </b>     |
| {\$conjunctional_agent_ph}                           | #CONJUNCTIONAL_AGENT_PHONE#                                     | <b> </b>     |
| {\$conjunctional_agent_mo}                           | #CONJUNCTIONAL_AGENT_MOBILE#                                    | <b> </b>     |
| {\$conjunctional_agent_em}                           | #CONJUNCTIONAL_AGENT_EMAIL#<br>#CONJUNCTIONAL_AGENT_LETTER_HEAD |              |
| {\$conjunctional_agent_lh}                           | #   |              |
| {\$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#                                      |              |
|  |   | t            |
| {\$vendor solicitor cp}                              | #VFNDOR SOLICITOR COMPANY#                                      |              |
|  | #VENDOR_SOLICITOR_COMPANY#<br>#VENDOR SOLICITOR SALUTATION#     | +            |
| {\$vendor_solicitor_dear}                            | #VENDOR_SOLICITOR_SALUTATION#                                   |              |
| {\$vendor_solicitor_dear}<br>{\$vendor_solicitor_ph} | #VENDOR_SOLICITOR_SALUTATION#<br>#VENDOR_SOLICITOR_PHONE#       |              |
| {\$vendor_solicitor_dear}                            | #VENDOR_SOLICITOR_SALUTATION#                                   |              |

| Idvender_solicitor_ioc)         #VENDOR_SOLICITOR_FAX#           [Svender_solicitor_fot]         #VENDOR_SOLICITOR_FAX#           [Sauctioneer]         #AUCTIONEER           [Sauctioneer]         #AUCTIONEER_FIRSTNAME#           [Sauctioneer_op]         #AUCTIONEER_SUNAAME#           [Sauctioneer_op]         #AUCTIONEER_COMPANY#           [Sauctioneer_op]         #AUCTIONEER_COMPANY#           [Sauctioneer_op]         #AUCTIONEER_COMPANY#           [Sauctioneer_mo]         #AUCTIONEER_MOBILE#           [Sauctioneer_mo]         #AUCTIONEER_ENDER_ETERTER_HEAD#           [Sauctioneer_nh]         #AUCTIONEER_ETERTER_HEAD#           [Sauctioneer_fx]         #AUCTIONEER_ETERTER_HEAD#           [Sauctioneer_fx]         #AUCTIONEER_ETERTER_HEAD#           [Sauctioneer_fx]         #AUCTIONEER_ETERTER_HEAD#           [Sauctioneer_fx]         #AUCTIONEER_ETERTER_HEAD#           [Sauctioneer_fx]         #AUCTIONEER_ETER_HEAD#           [Sauctioneer_fx]         #AUCTIONEER_ETER_HEAD#           [Sauctioneer_fx]         #AUCTIONEER_ETER_HEAD#           [Sauctioneer_fx]         #AUCTIONEER_ETER_HEAD#           [Sauctioneer_fx]         #BUSINESS_FIRSTMAME#           [Sauctinees_cp]         #BUSINESS_SAUTATION#           [Sbusiness_ch]         #BUSINESS_ENDE#                                    | {\$vendor_solicitor_lh}                | #VENDOR_SOLICITOR_LETTER_HEAD#   |  |
|--|--|----------------------------------|--|
| [\$vendor, solicitor, fx]       #VENDOR, SOLICITOR, FAX#         [\$auctioneer, fn]       #AUCTIONEER, FIRSTNAME#         [\$auctioneer, gn]       #AUCTIONEER, SURNAME#         [\$auctioneer, gn]       #AUCTIONEER, SURNAME#         [\$auctioneer, gn]       #AUCTIONEER, SURNAME#         [\$auctioneer, gn]       #AUCTIONEER, SURNAME#         [\$auctioneer, dear.]       #AUCTIONEER, SAUTATION#         [\$auctioneer, mo]       #AUCTIONEER, SAUTATION#         [\$auctioneer, mo]       #AUCTIONEER, ENAIL#         [\$auctioneer, fn]       #AUCTIONEER, ENAIL#         [\$auctioneer, fn]       #AUCTIONEER, ENAIL#         [\$auctioneer, fn]       #AUCTIONEER, FAX#         [\$business]       #BUSINESS, SURNAME#         [\$business, nn]       #BUSINESS, COMPANY#         [\$business, nn]       #BUSINESS, MOBILE#         [\$business, nn]       #BUSINESS, MOBILE#         [\$business, nn]       #BUSINESS, ADDRES#         [\$business, nn]<   |  |                                  |  |
| [Sauctioneer]       #AUCTION EER#         [Sauctioneer_sn)       #AUCTION EER_SURNAME#         [Sauctioneer_op)       #AUCTION EER_COMPANY#         [Sauctioneer_op]       #AUCTION EER_COMPANY#         [Sauctioneer_ph]       #AUCTION EER_COMPANY#         [Sauctioneer_ph]       #AUCTION EER_MOBILE#         [Sauctioneer_no]       #AUCTION EER_MOBILE#         [Sauctioneer_lb]       #AUCTION EER_HONE#         [Sauctioneer_lb]       #AUCTION EER_LADDRESS#         [Sauctioneer_lb]       #AUCTION EER_FAX#         [Sauctioneer_fs]       #AUCTION EER_FAX#         [Sbusiness]       #BUSINESS_SURNAME#         [Sbusiness_cp]       #BUSINESS_COMPANY#         [Sbusiness_cp]       #BUSINESS_COMPANY#         [Sbusiness_cp]       #BUSINESS_LITTER_HEAD#         [Sbusiness_cp]       #BUSINESS_LITTER_HEAD#         [Sbusiness_ch]       #BUSINESS_C  |  |                                  |  |
| [Sauctioneer_n]       #AUCTIONEER_FIRSTNAME#         [Sauctioneer_op]       #AUCTIONEER_COMPANY#         [Sauctioneer_op]       #AUCTIONEER_COMPANY#         [Sauctioneer_op]       #AUCTIONEER_COMPANY#         [Sauctioneer_m]       #AUCTIONEER_MOBILE#         [Sauctioneer_m]       #AUCTIONEER_MOBILE#         [Sauctioneer_no]       #AUCTIONEER_MOBILE#         [Sauctioneer_no]       #AUCTIONEER_MOBILE#         [Sauctioneer_no]       #AUCTIONEER_ADDRESS#         [Sauctioneer_loc]       #AUCTIONEER_ADDRESS#         [Sauctioneer_loc]       #AUCTIONEER_ADDRESS#         [Sbusiness]       #BUSINESS_FIRSTNAME#         [Sbusiness_fn]       #BUSINESS_FIRSTNAME#         [Sbusiness_gear]       #BUSINESS_SAULTATION#         [Sbusiness_gear]       #BUSINESS_SAULTATION#         [Sbusiness_mo]       #BUSINESS_MOBILE#         [Sbusiness_is]       #BUSINESS_MOBILE#         [Sbusiness_is]       #BUSINESS_MOBILE#         [Sbusiness_is]       #BUSINESS_FIRSTNAME#         [Sbusiness_is]       #BUSINESS_FIRSTNAME#         [Sbusiness_is]       #BUSINESS_COMPANY#         [Sbusiness_is]       #BUSINESS_COMPANY#         [Sbusiness_is]       #BUSINESS_COMPANY#         [Sbusiness]       #BUSINESS_COMPANY#  |  |                                  |  |
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| {Sauctioneer_ph}#A UCTIONEER_PHONE#{Sauctioneer_mo}#A UCTIONEER_EMOBILE#{Sauctioneer_ih}#A UCTIONEER_EMAIL#{Sauctioneer_loc}#A UCTIONEER_LETTER_HEAD#{Sauctioneer_fx}#A UCTIONEER_LETTER_HEAD#{Sauctioneer_fx}#A UCTIONEER_FAX#{Sbusiness}#BUSINESS{Sbusiness}#BUSINESS{Sbusiness_n}#BUSINESS_FIRSTNAME#{Sbusiness_en}#BUSINESS_COMPANY#{Sbusiness_en}#BUSINESS_CANPANY#{Sbusiness_en}#BUSINESS_MOBILE#{Sbusiness_en}#BUSINESS_MOBILE#{Sbusiness_en}#BUSINESS_CANPANY#{Sbusiness_en}#BUSINESS_CANPANY#{Sbusiness_en}#BUSINESS_MOBILE#{Sbusiness_en}#BUSINESS_MOBILE#{Sbusiness_ino}#BUSINESS_ENALL#{Sbusiness_ino}#BUSINESS_ENALL#{Sbusiness_ino}#BUSINESS_ENALL#{Sbusiness_ino}#BUSINESS_ENALL#{Sbusiness_ino}#BUSINESS_ENALL#{Sbusiness_ino}#BUSINESS_ENALL#{Sprospective_vendor_in}#PROSPECTIVE_VENDOR FIRSTNAME#{Sprospective_vendor_in}#PROSPECTIVE_VENDOR COMPANY#{Sprospective_vendor_in}#PROSPECTIVE_VENDOR_COMPANY#{Sprospective_vendor_in}#PROSPECTIVE_VENDOR_COMPANY#{Sprospective_vendor_in}#PROSPECTIVE_VENDOR_COMPANY#{Sprospective_vendor_in}#PROSPECTIVE_VENDOR_COMPANY#{Sprospective_vendor_in}#PROSPECTIVE_VENDOR_COMPANY#{Sprospective_vendor_in}#PROSPECTIVE_VENDOR_COMPANY#{Sprospective_vendor_in}#PROSPEC   |  |                                  |  |
| [Sauctioneer_mo]       #A UCTIONEER_MOBILE#         [Sauctioneer_er_em]       #A UCTIONEER_EMAIL#         [Sauctioneer_loc]       #A UCTIONEER_LETTER_HEAD#         [Sauctioneer_fx]       #A UCTIONEER_ADDRESS#         [Sauctioneer_fx]       #A UCTIONEER_ADDRESS#         [Sbusiness]       #BUSINESS_FIRSTNAME#         [Sbusiness_fn]       #BUSINESS_FIRSTNAME#         [Sbusiness_fn]       #BUSINESS_COMPANY#         [Sbusiness_cp]       #BUSINESS_SAULTATION#         [Sbusiness_ch]       #BUSINESS_FIRSTNAME#         [Sbusiness_ch]       #BUSINESS_SAULTATION#         [Sbusiness_ch]       #BUSINESS_SAULTATION#         [Sbusiness_ch]       #BUSINESS_EMAIL#         [Sbusiness_inh]       #BUSINESS_LETTER_HEAD#         [Sbusiness_loc]       #BUSINESS_EDECTIVE_VENDOR##         [Sprospective_vendor_fn]       #PROSPECTIVE_VENDOR_SURNAME#         [Sprospective_vendor_gn]       #PROSPECTIVE_VENDOR_SURNAME#         [Sprospective_vendor_gn]       #PROSPECTIVE_VENDOR_SUNNAME#         [Sprospective_vendor_m]       #PROSPECTIVE_VENDOR_SUNNAME#         [Sprospective_vendor_m]       #PROSPECTIVE_VENDOR_MOBILE#         [Sprospective_vendor_m]       #PROSPECTIVE_VENDOR_MOBILE#         [Sprospective_vendor_m]       #PROSPECTIVE_VENDOR_NOBILE#         [  |  |                                  |  |
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| [Sauctioneer_Ih]#AUCTIONEER_LETTER_HEAD#[Sauctioneer_Ioc]#AUCTIONEER_ADDRESS#[Sauctioneer_fx]#AUCTIONEER_ADDRESS#[Sbusiness]#BUSINESS[Sbusiness]#BUSINESS[Sbusiness]#BUSINESS[Sbusiness]#BUSINESS_SURNAME#[Sbusiness_cp]#BUSINESS_SURNAME#[Sbusiness_cp]#BUSINESS_SURNAME#[Sbusines_cdear]#BUSINESS_FILTION#[Sbusiness_mo]#BUSINESS_MOBILE#[Sbusiness_mo]#BUSINESS_MOBILE#[Sbusiness_mo]#BUSINESS_EMAIL#[Sbusiness_h]#BUSINESS_EMAIL#[Sbusiness_inb]#BUSINESS_EMAIL#[Sbusiness_fx]#BUSINESS_EMAIL#[Sbusiness_fx]#BUSINESS_EADDRESS#[Sprospective_vendor_fn]#PROSPECTIVE_VENDOR_FIRSTNAME#[Sprospective_vendor_fn]#PROSPECTIVE_VENDOR_SURNAME#[Sprospective_vendor_cp]#PROSPECTIVE_VENDOR_COMPANY#[Sprospective_vendor_deat#PROSPECTIVE_VENDOR_COMPANY#[Sprospective_vendor_deat#PROSPECTIVE_VENDOR_MORIE#[Sprospective_vendor_deat#PROSPECTIVE_VENDOR_CMAIL#[Sprospective_vendor_deat#PROSPECTIVE_VENDOR_CMAIL#[Sprospective_vendor_m]#PROSPECTIVE_VENDOR_EMAIL#[Sprospective_vendor_n]#PROSPECTIVE_VENDOR_EMAIL#[Sprospective_vendor_n]#PROSPECTIVE_VENDOR_EMAIL#[Sprospective_vendor_n]#PROSPECTIVE_VENDOR_EMAIL#[Sprospective_vendor_n]#PROSPECTIVE_VENDOR_EMAIL#[Sprospective_vendor_n]#PROSPECTIVE_VENDOR_EMAIL#[Spurchaser_n]#PURCHASER_PONDE# </td <td></td> <td></td> <td></td>  |  |                                  |  |
| [Sauctioneer_loc)#AUCTIONEER_ADDRESS#[Sauctioneer_fx]#AUCTIONEER_FAX#[Sbusiness]#BUSINESS[Sbusiness]#BUSINESS[Sbusiness_fn]#BUSINESS_FIRSTNAME#[Sbusiness_cp]#BUSINESS_COMPANY#[Sbusiness_cp]#BUSINESS_COMPANY#[Sbusiness_ph]#BUSINESS_COMPANY#[Sbusiness_ph]#BUSINESS_MONE#[Sbusiness_mo]#BUSINESS_EMAIL#[Sbusiness_mo]#BUSINESS_EMAIL#[Sbusiness_ma]#BUSINESS_EMAIL#[Sbusiness_mb]#BUSINESS_EMAIL#[Sbusiness_loc]#BUSINESS_EMAIL#[Sbusiness_loc]#BUSINESS_EMAIL#[Spospective_vendor]#PROSPECTIVE_VENDOR[Sprospective_vendor]#PROSPECTIVE_VENDOR_FISTNAME#[Sprospective_vendor_sn]#PROSPECTIVE_VENDOR_SURNAME#[Sprospective_vendor_gb]#PROSPECTIVE_VENDOR_COMPANY#[Sprospective_vendor_mo]#PROSPECTIVE_VENDOR_MONE#[Sprospective_vendor_mo]#PROSPECTIVE_VENDOR_MONE#[Sprospective_vendor_mo]#PROSPECTIVE_VENDOR_MONE#[Sprospective_vendor_mo]#PROSPECTIVE_VENDOR_EMAIL#[Sprospective_vendor_mo]#PROSPECTIVE_VENDOR_MONE#[Sprospective_vendor_mo]#PROSPECTIVE_VENDOR_EMAIL#[Sprospective_vendor_mo]#PROSPECTIVE_VENDOR_EMAIL#[Sprospective_vendor_mo]#PROSPECTIVE_VENDOR_EMAIL#[Sprospective_vendor_n]#PROSPECTIVE_VENDOR_EMAIL#[Sprospective_vendor_n]#PROSPECTIVE_VENDOR_EMAIL#[Spurchaser]#PURCHASER_FIRSTNAME#[Spurchaser]#PURCHASER_SAUUTATION# </td <td></td> <td></td> <td></td>  |  |                                  |  |
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| {\$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_lo}#PROSPECTIVE_VENDOR_LETTER_HEAD#{\$prospective_vendor_loc}#PROSPECTIVE_VENDOR_ADDRESS#{\$prospective_vendor_loc}#PROSPECTIVE_VENDOR_FAX#{\$purchaser}#PURCHASER_FIRSTNAME#{\$purchaser_fn}#PURCHASER_SURNAME#{\$purchaser_cp}#PURCHASER_COMPANY#{\$purchaser_dear}#PURCHASER_PHONE#{\$purchaser_mo}#PURCHASER_MOBILE#{\$purchaser_mo}#PURCHASER_MOBILE#{\$purchaser_mo}#PURCHASER_MOBILE#{\$purchaser_lh}#PURCHASER_MOBILE#{\$purchaser_fn}#PURCHASER_COMPANY#{\$purchaser_dear}#PURCHASER_MOBILE#{\$purchaser_dear}#PURCHASER_MOBILE#{\$purchaser_fn}#PURCHASER_MOBILE#{\$purchaser_mo}#PURCHASER_MOBILE#{\$purchaser_mo}#PURCHASER_EMAIL#{\$purchaser_lh}#PURCHASER_EMAIL#{\$purchaser_lh}#PURCHASER_ADDRESS#{\$purchaser_loc}#PURCHASER_ADDRESS#{\$purchaser_fx}#PURCHASER_FAX#   |  |                                  |  |
| {\$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_cp}#PURCHASER_SURNAME#{\$purchaser_cp}#PURCHASER_SALUTATION#{\$purchaser_dear}#PURCHASER_NONE#{\$purchaser_mo}#PURCHASER_MOBILE#{\$purchaser_mo}#PURCHASER_MOBILE#{\$purchaser_mo}#PURCHASER_EMAIL#{\$purchaser_lh}#PURCHASER_EMAIL#{\$purchaser_lh}#PURCHASER_EMAIL#{\$purchaser_lh}#PURCHASER_EMAIL#{\$purchaser_lh}#PURCHASER_EMAIL#{\$purchaser_lh}#PURCHASER_EMAIL#{\$purchaser_lh}#PURCHASER_ADDRESS#{\$purchaser_lh}#PURCHASER_ADDRESS#{\$purchaser_lh}#PURCHASER_ADDRESS#{\$purchaser_loc}#PURCHASER_FAX#  |  |                                  |  |
| {\$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_cp}#PURCHASER_SURNAME#{\$purchaser_cp}#PURCHASER_SALUTATION#{\$purchaser_ph}#PURCHASER_PHONE#{\$purchaser_mo}#PURCHASER_EMAIL#{\$purchaser_em}#PURCHASER_EMAIL#{\$purchaser_lh}#PURCHASER_EMAIL#{\$purchaser_lh}#PURCHASER_EMAIL#{\$purchaser_lh}#PURCHASER_EMAIL#{\$purchaser_fn}#PURCHASER_EMAIL#{\$purchaser_em}#PURCHASER_EMAIL#{\$purchaser_fh}#PURCHASER_EMAIL#{\$purchaser_fh}#PURCHASER_EMAIL#{\$purchaser_lh}#PURCHASER_EMAIL#{\$purchaser_lh}#PURCHASER_ADDRESS#{\$purchaser_fx}#PURCHASER_ADDRESS#{\$purchaser_fx}#PURCHASER_ADDRESS#   |  |                                  |  |
| {\$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_COMPANY#{\$purchaser_cp}#PURCHASER_SALUTATION#{\$purchaser_dear}#PURCHASER_PHONE#{\$purchaser_em}#PURCHASER_MOBILE#{\$purchaser_em}#PURCHASER_EMAIL#{\$purchaser_lh}#PURCHASER_EMAIL#{\$purchaser_lh}#PURCHASER_ADDRESS#{\$purchaser_loc}#PURCHASER_ADDRESS#{\$purchaser_loc}#PURCHASER_ADDRESS#{\$purchaser_fx}#PURCHASER_FAX#   |  |                                  |  |
| {\$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_COMPANY#{\$purchaser_dear}#PURCHASER_SALUTATION#{\$purchaser_mo}#PURCHASER_MOBILE#{\$purchaser_em}#PURCHASER_EMAIL#{\$purchaser_em}#PURCHASER_EMAIL#{\$purchaser_lh}#PURCHASER_EMAIL#{\$purchaser_lh}#PURCHASER_ADDRESS#{\$purchaser_loc}#PURCHASER_ADDRESS#{\$purchaser_loc}#PURCHASER_ADDRESS#{\$purchaser_loc}#PURCHASER_FAX#  |  |                                  |  |
| {\$prospective_vendor_lh}#PROSPECTIVE_VENDOR_LETTER_HEAD#{\$prospective_vendor_loc}#PROSPECTIVE_VENDOR_ADDRESS#{\$prospective_vendor_fx}#PROSPECTIVE_VENDOR_FAX#{\$purchaser}#PURCHASER#{\$purchaser}#PURCHASER_FIRSTNAME#{\$purchaser_fn}#PURCHASER_SURNAME#{\$purchaser_cp}#PURCHASER_COMPANY#{\$purchaser_dear}#PURCHASER_SALUTATION#{\$purchaser_mo}#PURCHASER_MOBILE#{\$purchaser_em}#PURCHASER_EMAIL#{\$purchaser_em}#PURCHASER_EMAIL#{\$purchaser_lh}#PURCHASER_LETTER_HEAD#{\$purchaser_loc}#PURCHASER_ADDRESS#{\$purchaser_fx}#PURCHASER_FAX#   |  |                                  |  |
| {\$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_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_VENDOR_LETTER_HEAD# |  |
| {\$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_EMAIL#{\$purchaser_lh}#PURCHASER_LETTER_HEAD#{\$purchaser_loc}#PURCHASER_ADDRESS#{\$purchaser_fx}#PURCHASER_FAX#   |  | #PROSPECTIVE_VENDOR_ADDRESS#     |  |
| {\$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_VENDOR_FAX#         |  |
| {\$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#   |  | #PURCHASER#                      |  |
| {\$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#  |  | #PURCHASER_FIRSTNAME#            |  |
| {\$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#   |  | #PURCHASER_SURNAME#              |  |
| {\$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#   |  | #PURCHASER_COMPANY#              |  |
| {\$purchaser_mo}#PURCHASER_MOBILE#{\$purchaser_em}#PURCHASER_EMAIL#{\$purchaser_lh}#PURCHASER_LETTER_HEAD#{\$purchaser_loc}#PURCHASER_ADDRESS#{\$purchaser_fx}#PURCHASER_FAX#  |  | #PURCHASER_SALUTATION#           |  |
| {\$purchaser_em}#PURCHASER_EMAIL#{\$purchaser_lh}#PURCHASER_LETTER_HEAD#{\$purchaser_loc}#PURCHASER_ADDRESS#{\$purchaser_fx}#PURCHASER_FAX#  |  | #PURCHASER_PHONE#                |  |
| {\$purchaser_lh}#PURCHASER_LETTER_HEAD#{\$purchaser_loc}#PURCHASER_ADDRESS#{\$purchaser_fx}#PURCHASER_FAX#   |  | #PURCHASER_MOBILE#               |  |
| {\$purchaser_loc}#PURCHASER_ADDRESS#{\$purchaser_fx}#PURCHASER_FAX#  |  | #PURCHASER_EMAIL#                |  |
| {\$purchaser_fx} #PURCHASER_FAX#   | {\$purchaser_lh}                       | #PURCHASER_LETTER_HEAD#          |  |
|  |  | #PURCHASER_ADDRESS#              |  |
| {\$prospective_landlord} #PROSPECTIVE_LANDLORD#  | {\$purchaser_fx}                       | #PURCHASER_FAX#                  |  |
|  | {\$prospective_landlord}               | #PROSPECTIVE_LANDLORD#           |  |

|                               |  | 1 |
|-------------------------------|--|---|
| {\$prospective_landlord_fn}   | #PROSPECTIVE_LANDLORD_FIRSTNAME#       |   |
| {\$prospective_landlord_sn}   | #PROSPECTIVE_LANDLORD_SURNAME#         |   |
| {\$prospective_landlord_cp}   | #PROSPECTIVE_LANDLORD_COMPANY#         |   |
| (Corecostive landlard door)   | #PROSPECTIVE_LANDLORD_SALUTATION       |   |
| {\$prospective_landlord_dear} |  |   |
| {\$prospective_landlord_ph}   |  |   |
| {\$prospective_landlord_mo}   | #PROSPECTIVE_LANDLORD_MOBILE#          |   |
| {\$prospective_landlord_em}   | #PROSPECTIVE_LANDLORD_EMAIL#           |   |
| {\$prospective_landlord_lh}   | #PROSPECTIVE_LANDLORD_LETTER_HEAD<br># |   |
| {\$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_pn}         | #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_vendor}               | #PAST_PURCHASER_FAX#                   |   |
|                               | #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#                                | 1                                      |
| {\$contact_ph}                        | #CONTACT_PHONE#                                     | +                                      |
| {\$contact_mo}                        | #CONTACT_MOBILE#                                    | 1                                      |
| {\$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 ow    |
| {\$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#                                | <u> </u>                               |
| {\$prop_commis}                       | #PROPERTY_COMMISION#                                | <u> </u>                               |
| {\$prop_adj}                          | #PROPERTY_ADJUSTMENT#                               | placeholder only - does not retreive 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#                                  | <u> </u>                               |
| {\$prop_bath}                         | #PROPERTY_BATHROOM#                                 |  |
| {\$prop_garage}                       | #PROPERTY_GARAGE#                                   |  |
| {\$prop_car_space}                    | #PROPERTY_CAR_SPACE#                                |  |
| {\$prop_carport}                      | #PROPERTY_CARPORT#                                  |  |
| {\$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#                            |  |
| · · · · · ·                           |   | 1                                      |
| {\$prop_strata_rate}                  | #PROPERTY_STRATA_RATES#                             |  |
| {\$prop_council_rate}                 | #PROPERTY_STRATA_RATES#<br>#PROPERTY_COUNCIL_RATES# |  |
| · · · · · · · · · · · · · · · · · · · | #PROPERTY_STRATA_RATES#                             |  |

| {\$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_sn}         |                                 |  |
| {\$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**

e

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

| New Search           |  | Saved Searches |
|----------------------|--|----------------|
| -:: Contact Search : |  |                |
| First Name:          | Last Name  | 12             |
| Home Phone:          | Mobile:  |                |
| Email:               | Company:   |                |
| Address:             | Suburb:  |                |
| Custom Filters:      | edit No filters created yet.   |                |
| Subscribe To:        | Auction Reminders Auction Reminders Newsletters OFI Times Property Updates | ×<br>IE        |
| :: Group Search ::-  |  |                |
| Sale/Rental:         | <b>I</b>   |                |
| P +- +               |  |                |

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).

| Custom Filters    |  |
|-------------------|--|
| Have Email        |  |
| Home Phone Filter |  |
| Wrk. Phone Filter |  |
| Mobile Filter     |  |
| Address Filter    |  |
| Save Cancel       |  |

3. Click Save

| :: Advanced C   | ontact Search : New Search   |                | 8   |
|---|--|----------------|-----|
| New Search  |  | Saved Searches | -   |
| -:: Contact Search  | 19   |                | 1.4 |
| First Name:<br>Home Phone:<br>Email:<br>Address:<br>Custom Filters: | Last Name: Last Name: Mobile: Company: Suburb:                               |                | E   |
| Subscribe To:   | Auction Reminders Auction Reminders OFI Times Property Updates Selec Desulte | M III M        |     |
| Sale/Rental:  | Search   |                | ].  |

3. Tick Newsletters under Subscribe To:

| :: Advanced Co  | ntact Search : New Search   | 8              |
|-----------------|---|----------------|
| New Search      |   | Saved Searches |
| Contact Search  | 0   |                |
| First Name:     | Last Name:  | E              |
| Home Phone:     | Mobile:   |                |
| Email:          | Company:  |                |
| Address:        | Suburb:   |                |
| Custom Filters: | edit Have Email   |                |
| Subscribe To:   | <ul> <li>Auction Reminders</li> <li>Newsletters</li> <li>OFI Times</li> <li>Property Updates</li> <li>Seles Depute</li> </ul> | ×<br>EE        |
| Sale/Rental:    | Search  |                |

#### 4. Click Search

| New Search     | Search Results | Refine Search  | Saved          | Searches     |
|----------------|----------------|----------------|----------------|--------------|
| Sort By: Conta | act Name: A-Z  |                |                |              |
| Contact        |                | Assigned Staff | Last Contacted | Contact Info |
| Jack Black     |                | John Smith     |                | 014          |
| Gary Brown     |                | John Smith     |                | Q III        |
| Michael Johns  | on             | John Smith     | 02/11/11       | 0 ER         |
| Sam Jones      |                | John Smith     |                | Q III        |
| Samantha Jon   | es             | John Smith     | 10/11/11       | 0 MIZ        |
| Mary May       |                | John Smith     | 11/11/11       | Q III        |
| Charles Robert | S              | John Smith     |                | 012          |

#### 5. Click on the E-Newsletter action icon

\*Note: These contacts will appear as recipients.

6. Follow the steps under <u>How to Create an E-Newsletter</u>

## **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 <u>property card</u>, the <u>contact card</u> or following an <u>advanced contact search</u>. To generate an E-Newsletter, follow the steps below.

1. Click on the E-Newsletter Action icon 📳.

| Send E-Newsle       | etter            |  |                          | • 8                     |
|---------------------|------------------|--|--------------------------|-------------------------|
| Step 1 of 3 - Selec | t a template     |  | View Saved E-Newsletters | View Sent E-Newsletters |
| Select Template     | Delivery Details | <section-header><section-header></section-header></section-header> | AGENTEDX                 |                         |
|                     |                  | 2  |                          |                         |
|                     |                  |  |                          | Save & Proceed »        |

- 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<br>Tick All<br>Untick All         | <ul> <li>Gary Brown (g</li> <li>Michael Jones</li> <li>Sam Jones (sa</li> <li>Samantha Jon</li> <li>Mary May (mn</li> </ul> | ck@hotmail.com)<br>ary.brown@hotmail.com)<br>(mick@gmail.com)<br>am@hotmail.com)<br>es (samantha@hotmail.com)<br>n@hotmail.com)<br>ts (charles@gmail.com) |                          |                         |
| Reply From:                              | John Smith (john  | @agentbox.com.au)   |                          |                         |
| Subject: *                               | Agentbox July Ne  |   |                          |                         |
| « Previous Ste                           | P   |   |                          | 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.

| Send E-Newsle                                  | etter   |   |                                   | . 2                        |
|--|---|---|-----------------------------------|----------------------------|
| 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                |                                   |                            |
|  | -Newsletter, select a<br>d lines to edit that se                          | nd add your desired section(s<br>ction. | from the drop down box. Onc       | e it appears, simply click |
|  |   | Not interested anymore? U               | nsubscribe                        |                            |
|  | AGENT <mark>BO</mark>   | ×                                       | Newslette                         | r Update 💡                 |
|  |   | : in this Issue :                       | *                                 |                            |
| Hello  | day, 17th November 20<br><i>Contact's first name</i> ,<br>egards<br>Smith | 011                                     | 02 9209 4174 - <u>office@aqen</u> | tbox.com.au                |
| « Previous Ste                                 | p Send for T  | festing Save                            | Preview                           | Send Now                   |

\*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

| Send E-Newsle            | etter   |                          |                               | 0 8                        |
|--------------------------|---|--------------------------|-------------------------------|----------------------------|
| Step 3 of 3 - Edit th    | hen send your e-ne  | wsletter                 | View Saved E-Newsletters      | View Sent E-Newsletters    |
| Select Template          | Delivery Details  | Edit & Send E-Newsletter |                               |                            |
|                          | -Newsletter, select a<br>I lines to edit that se                                    |                          | ) from the drop down box. Onc | e it appears, simply click |
| Add Section:             |   | Add                      |                               |                            |
|                          | Auction Timeta<br>Current Listings  | I Contomute Distant      | Insubscribe                   | ×                          |
| <b>*</b>                 | Feature Proper<br>News Item<br>Open for Inspec<br>Property Image<br>Sold Properties | s<br>s                   | Newslette                     | r Update 📰                 |
|                          |   | :: In this Issue ::      |                               |                            |
| Wedne                    | esday, 23rd November  | 2011                     | 02 9209 4174 - office@agen    | tbox.com.au                |
| Hello<br>kind re<br>John | egards  |                          |                               |                            |
| Land                     |   |                          |                               |                            |
| « Previous Ste           | p Send for 1  | esting Save              | Preview                       | Send Now                   |

5. Click on Add

| ::Edit this Section              | tion: Current Listings  |   |  |
|----------------------------------|---|---|--|
| Title:                           | Current Listings  | - |  |
| Selected Listing(s):             | 2 record(s) found   |   |  |
| Refine<br>Tick All<br>Unlick All | <ul> <li>ID #1P0001 - 1 Jones Street, Copacabana</li> <li>ID #1P0002 - Unit 6/12 Del Rio Drive, Copacabana</li> </ul> |   |  |
|                                  |   | _ |  |
|                                  | Save  |   |  |
|                                  |   |   |  |

- 6. Click on Save
- 7. Current Listings will be added to your E-Newsletter

| Step 3 of 3 - Edit th | nen send your e-nev                            | wsletter  | View Saved E-Newsletters       | View Sent E-News       | etters |
|-----------------------|--|---|--------------------------------|------------------------|--------|
| Select Template       | Delivery Details                               | Edit & Send E-Newsletter                                  |                                |                        |        |
| To construct your E   | -Newsletter, select and lines to edit that see | nd add your desired section(s)                            | from the drop down box. Onc    | e it appears, simply c | lick   |
| Add Section:          |  | Add   |                                |                        |        |
| 777                   |  |   |                                |                        | *      |
| Curr                  | ent Listings                                   |   |                                |                        |        |
| 1                     |  | 3 Copacabana, 1 Jones S                                   | itreet C                       | ontact Agent           |        |
| 1                     |  | 4 Luxury Balinese Inspired F                              | Residence                      |                        |        |
| 1                     |  | Don't miss out on this one!<br>2 area,openingmore details | Relax in your open plan living |                        |        |
|                       |  | 3 Copacabana, Unit 6/12                                   | Del Rio Drive                  | Offers over            | E      |
|                       |  | 2 Oasis By the Sea  |                                | \$950,000              |        |
|                       |  | Low maintenance living is a appointed, large 3 bemor      |                                |                        |        |
|                       |  | appointed, large 5 behtor                                 | e details                      |                        |        |
|                       |  |   |                                | * Back to Top          |        |
|                       |  |   |                                |                        | -      |
| « Previous Ste        | p Send for T                                   | esting 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

|  | tter  |  |   |                             |
|--|---|--|---|-----------------------------|
| 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   |   |                             |
|  | Newsletter, select an<br>lines to edit that sec | d add your desired section(s)<br>tion.   | from the drop down box. One                 | ce it appears, simply click |
| Curr   | ent Listings                                    | <ul> <li>Copacabana, 1 Jones S</li> <li>Luxury Balinese Inspired F</li> <li>Don't miss out on this one!</li> <li>area,openingmore details</li> </ul> | lesidence<br>Relax in your open plan living | ontact Agent,               |
|  |   | 3 Copacabana, Unit 6/12<br>2 Oasis By the Sea<br>Low maintenance living is a<br>appointed, large 3 bemor   | ensured in this superbly                    | Offers over<br>\$950,000    |
|  |   |  |   | * Back to Top               |
| « Previous Ster                                | Send for Te                                     | esting Save  | Preview                                     | Send Now                    |

2. Edit as you wish

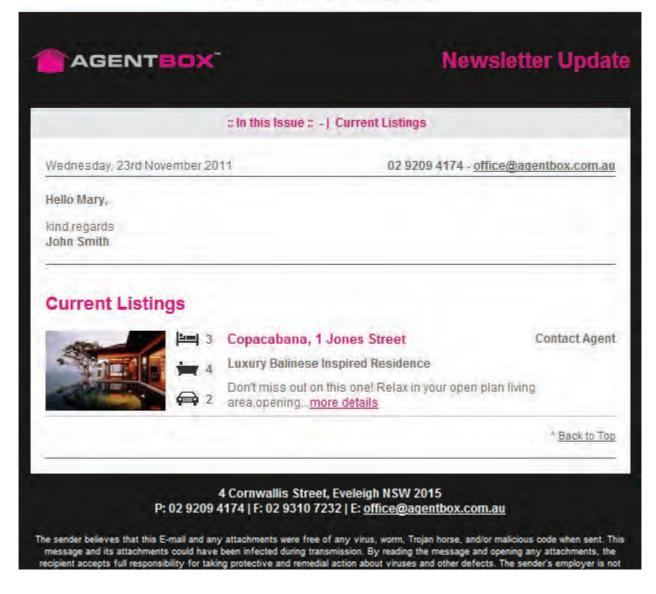
| Title:                           | Current Listings   |                |
|----------------------------------|--|----------------|
| Selected Listing(s):             | 2 record(s) found.   |                |
| Refine<br>TICK All<br>Untick All | ID #1P0001 - 1 Jones Street, Copacabana ID #1P0002 - Unit 6/12 Del Rio Drive, Copacabana |                |
|                                  | Save   | Remove Section |

3. Click on Save

| Send E-Newsle                                  | etter  |  |                                | •                            |
|--|--|--|--------------------------------|------------------------------|
| 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   |                                |                              |
|  | -Newsletter, select a<br>d lines to edit that se | nd add your desired section(s)   | from the drop down box. Or     | nce it appears, simply click |
| Add Section:                                   |  | Add  |                                |                              |
| John   | Smith  |  |                                | 1                            |
| 200  |  |  | 22222222222222                 | 222222                       |
| Cur  | rent Listings                                    |  |                                |                              |
|  |  | 3 Copacabana, 1 Jones S  | treet                          | Contact Agent                |
| 3  |  | 4 Luxury Balinese Inspired F   |                                | 1                            |
| 10   |  | Don't miss out on this one!<br>2 area.openingmore details                | Relax in your open plan living |                              |
|  |  | - area, openingmore details  |                                | E                            |
| 1.1.   |  |  |                                | * Back to Top                |
|  |  | 4 Communities Street Fundation   | NCW 2045                       |                              |
|  | P: 02 92   | 4 Cornwallis Street, Eveleig<br>09 4174   F: 02 9310 7232   E: <u>ol</u> |                                | ÷.                           |
| -  |  |  |                                |                              |
| « Previous Ste                                 | p Send for T                                     | esting Save  | Preview                        | Send Now                     |
|  |  |  |                                |                              |

4. Click on Preview to view the contents of your Newsletter

Not interested anymore? Unsubscribe



## **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-Newsle   | etter  |   |                                |                             |
|---|--|---|--------------------------------|-----------------------------|
| Step 3 of 3 - Edit then send your e-newsletter  |  | View Saved E-Newsletters                                    | View Sent E-Newsletter         |                             |
| Select Template   | Delivery Details                               | Edit & Send E-Newsletter                                    |                                |                             |
|   | -Newsletter, select and lines to edit that see | nd add your desired section(s)                              | from the drop down box. One    | ce it appears, simply click |
| Add Section:  |  | Add   |                                |                             |
| 777   |  |   |                                |                             |
| Cur   | rent Listings                                  |   |                                |                             |
|   |  | 3 Copacabana, 1 Jones S                                     |                                | ontact Agent                |
|   |  | 4 Luxury Balinese Inspired F<br>Don't miss out on this one! | Relax in your open plan living |                             |
|   |  | 2 area,openingmore details                                  |                                |                             |
|   |  | 3 Copacabana, Unit 6/12                                     | Del Rio Drive                  | Offers over                 |
| 1   |  | 2 Oasis By the Sea  |                                | \$950,000                   |
|   | le 📈 🔿   | 2 Low maintenance living is a appointed, large 3 bemor      |                                |                             |
|   |  |   |                                | * Back to Top               |
| and the second se |  |   |                                | and a second                |

| ::Edit this Section              | on: Current Listings  | 9              |
|----------------------------------|---|----------------|
| Title:                           | Current Listings  |                |
| Selected Listing(s):             | 2 record(s) found.  |                |
| Refine<br>Tick All<br>Unlick All | <ul> <li>ID #1P0001 - 1 Jones Street, Copacabana</li> <li>ID #1P0002 - Unit 6/12 Del Rio Drive, Copacabana</li> </ul> |                |
|                                  | Save  | Remove Section |
|                                  |   |                |

2. Click on Remove Section

| ::Edit this Section            | on: Current Listings   | 8              |
|--------------------------------|--|----------------|
| Title:<br>Selected Listing(s): | Current Listings<br>2 record(s) found.                       |                |
| Refine                         | Warning!   | na             |
| Tick All<br>Untick All         | Are you sure you want to remove<br>this component?<br>Yes No |                |
|                                | Save   | Remove Section |

#### 3. Click Yes

| Send E-Newsle        | etter  |   |   | 9 8                        |
|----------------------|--|---|---|----------------------------|
| Step 3 of 3 - Edit t | hen send your e-ne   | wsletter  | View Saved E-Newsletters  | View Sent E-Newsletters    |
| Select Template      | Delivery Details   | Edit & Send E-Newsletter  |   |                            |
|                      | -Newsletter, select a<br>l lines to edit that se   |   | from the drop down box. Onc   | e it appears, simply click |
| Add Section:         |  | Add   |   |                            |
| Hello                | egards   | # In this Issue #   | -<br>02 9209 4174 - <u>office@aqen</u>  | tbox.com.au<br>E           |
|                      | r believes that this E-mail an<br>e and its attachments could h<br>accents full resonnsibility for | ave been infected during transmission. B<br>taking protective and remedial action abo | ffice@agentbox.com.au<br>s, worm, Trojan horse, and/or mailcious or<br>ly reading the message and opening any |                            |

# 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.

| Send E-Newsle   | tter                  |  |                             |                            |
|---|-----------------------|--|-----------------------------|----------------------------|
| Step 3 of 3 - Edit then send your e-newsletter                |                       | View Saved E-Newsletters View Sent E-New | View Sent E-Newsletters     |                            |
| Select Template   | Delivery Details      | Edit & Send E-Newsletter                 |                             |                            |
| To construct your E-<br>within the red dotted<br>Add Section: | Newsletter, select a  | nd add your desired section(s)<br>ction. | from the drop down box. Onc | e it appears, simply click |
| 1   |                       | Not interested anymore? Ur               | nsubscribe                  | Í                          |
| <b>1</b>  | GENTEO                | K.                                       | Newsletter                  | r Update                   |
|   |                       | :: In this Issue :: - News               | tems                        |                            |
| Thursd  | lay, 1st December 201 | 11                                       | 02 9209 4174 - office@agent | tbox.com.au                |
| Hello N   | lary,                 |  |                             |                            |
| kind re<br>Your A   |                       |  |                             |                            |
| « Previous Step   | p Send for T          | Testing Save                             | Preview                     | Send Now                   |
| « Previous Step   | Send for              | Save Save                                | Preview                     | Send Now                   |

3. Click on the Custom Upload icon 🐣

| ::Edit this Se              | ction: News Item  | 8    |
|-----------------------------|---|------|
| Headline: *<br>Description: | Agentbox Support is Here to Help         B       I         I       I         I       I         Save | 1 th |

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.

| Browse Files     |                  |        |
|------------------|------------------|--------|
|                  | Overall progress |        |
|                  |                  | 0%     |
|                  | File Progress    |        |
|                  |                  | 0%     |
|                  |                  |        |
| Clear List       |                  | Upload |
| elected Files :: |                  |        |

4. Select Browse and select the image you want to upload and click Open.

| Look in:      | 🍌 Images   |                        | + G 💋     | P 🖽 🕈 |      |
|---------------|------------|------------------------|-----------|-------|------|
| (Fa           | Name       | *                      | Туре      | Size  |      |
| Recent Places |            | Training Room Logo     | PNG image |       | 7 KB |
| -             |            |                        |           |       |      |
| Desktop       |            |                        |           |       |      |
|               |            |                        |           |       |      |
| Libraries     |            |                        |           |       |      |
|               |            |                        |           |       |      |
|               |            |                        |           |       |      |
| Computer      |            |                        |           |       |      |
|               |            |                        |           |       |      |
|               |            |                        |           |       |      |
| Computer      | File name: | Agentbox Training Room | Logo      | •     | 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.

0

| Browse Files            | a contractor     |          |
|-------------------------|------------------|----------|
|                         | Overall progress |          |
|                         |                  | 0%       |
|                         | File Progress    |          |
|                         |                  | 0%       |
|                         |                  |          |
| Clear List              |                  | Upload   |
| elected Files ::        |                  |          |
| 100 million 100 million |                  |          |
| Agentbox Training Rod   |                  | 6.5 kB 🗵 |

6. Select the insert image icon 💆.

| ::Edit this Se              | ction: News Item   | 8         |
|-----------------------------|--|-----------|
| Headline; *<br>Description: | Agentbox Support is Here to Help         B       I | + [ m ] + |

| General<br>Image URL |  |
|----------------------|--|
| Image description    |  |
| Preview              |  |
|                      |  |
|                      |  |
|                      |  |
|                      |  |

7. Select the image from the image list drop down.

| General Appearan                                      | ice Advanced                    |   |
|---|---------------------------------|---|
| Image URL<br>Image list<br>Image description<br>Title | Agentbox Training Room Logo.png |   |
| Preview   |                                 |   |
|   |                                 |   |
|   |                                 |   |
|   |                                 | 1 |
|   |                                 |   |

8. Image will appear in window.

| Image URL<br>Image list | http://eresrc.youragencies.com.au/0-3-01160700<br>Agentbox Training Room Logo.png |
|-------------------------|---|
| mage description        | Agentbox Training Room Logo.png   |
| Title                   | Agentbox Training Room Logo.png   |
| TR/                     | AINING ROOM   |

9. You can edit the positioning and dimensions of the image in the Appearance tab.

| Alignment<br>Dimensions    | Not set ▼<br>305 × 63 p× | Lorem ipsum,  |
|----------------------------|--------------------------|---|
| Vertical space             | Constrain proportions    | Dolor sit amet,<br>consectetuer adipiscing<br>loreum ipsum edipiscing<br>elit, sed diam nonummy<br>nibh euismod tincidunt |
| Horizontal space<br>Border |                          | nion euismod tincidunt<br>ut laoreet dolore magna<br>aliquam erat<br>volutpat.Loreum ipsum                                |
| Style                      |                          |   |
| Style                      |                          | volutpat.Loreum ipsum   |

10. Click insert

| ::Edit this Se              | ection: News Item  | 8 |
|-----------------------------|--|---|
| Headline: *<br>Description: | Agentbox Support is Here to Help<br><b>B</b> / U = = = Paragraph + :: :: :: :: :: :: :: :: :: :: :: :: : | m |
|                             | Save   | + |

#### 11. Click Save

| Send E-Newsle                                  | etter  |  |                             | • 8                        |
|--|--|--|-----------------------------|----------------------------|
| 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   |                             |                            |
|  | -Newsletter, select a<br>I lines to edit that se | nd add your desired section(s)<br>ction  | from the drop down box. Onc | e it appears, simply click |
| Add Section:                                   |  | Add  |                             |                            |
| Age  |  | t is Here to Help  |                             | * <u>Back to Top</u>       |
| The sende                                      |  | 4 Cornwallis Street, Eveleig<br>09 4174   F: 02 9310 7232   E: o<br>d any attachments were free of any virus | ffice@aqentbox.com.au       | ode when sent. This 🗢      |
| « Previous Ste                                 | p Send for 1                                     | Testing Save   | Preview                     | Send Now                   |

## **Insert Links to E-Newsletters**

How to Insert Custom Links into E-Newsletter

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.

| Step 3 of 3 - Edit t     | hen send your e-ne                               | wsletter                                 | View Saved E-Newsletters    | View Sent E-Newsletters    |
|--------------------------|--|--|-----------------------------|----------------------------|
| Select Template          | Delivery Details                                 | Edit & Send E-Newsletter                 |                             |                            |
|                          | -Newsletter, select a<br>d lines to edit that se | nd add your desired section(s)<br>ction. | from the drop down box. Onc | e it appears, simply click |
|                          |  | Not interested anymore? U                | nsubscribe                  | í                          |
| 1.2                      |  |  |                             |                            |
| 1                        | AGENTEO  | ×  | Newslette                   | r Update                   |
| <b>1</b>                 | AGENTEO  | x~<br>= In this Issue = - News           |                             | r Update                   |
|                          | AGENTEO  | :: In this Issue :: - New:               |                             | r Update                   |
|                          | day, 1st December 20                             | :: In this Issue :: - New:               | s Items                     | r Update                   |
| Thurs<br>Hello<br>Kind n | day, 1st December 20                             | :: In this Issue :: - New:               | s Items                     | r Update                   |

3. Type the text you would like to link, then highlight to select the text

| ::Edit this Section | on: Greeting Message  |
|---------------------|---|
| Greeting Message:   | B Z U E E E Paragraph + E E E E E E E E E E E E E E E E E E |
|                     | Save  |

3. Click on the insert link icon 📟

|  |            | -           | Insert/edit lini | ĸ |   |
|--|------------|-------------|------------------|---|---|
| General                                  | Popup      | Events      | Advanced         |   |   |
| 1. | properties |             |                  |   | - |
| Link UR                                  |            |             |                  |   |   |
| Anchors                                  |            |             |                  |   | • |
| Target                                   | Open in    | n this wind | low / frame      |   | • |
| Title                                    | 1          |             |                  |   |   |
| Class                                    | Not s      | iet         |                  | 1 |   |
|  |            |             |                  |   |   |
|  |            |             |                  |   |   |

4. Enter the link in the Link URL box, and select the target we recommend 'Open in New Window'

|           | Insert/edit link   |
|-----------|--|
| General   | Popup Events Advanced                                      |
| General p | roperties  |
|           |  |
| Link URL  | http://www.agentbox.com.au/                                |
| Anchors   |  |
| -         |  |
| Target    | Open in new window (_blank)                                |
| Title     | Open in this window / frame<br>Open in new window ( blank) |
|           | Open in parent window / frame (_parent)                    |
| Class     | Open in top frame (replaces all frames) (_top)             |
|           |  |
|           |  |
|           |  |
|           |  |
|           |  |

5. The text will now be linked. Click Save

| ::Edit this Section | on: Greeting Message   | 2 |
|---------------------|--|---|
| Greeting Message:   | B I U E E E Paragraph<br>B I U E E E E<br>Click here to visit our website<br>Click here to visit our website |   |
|                     | 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.

| Send E-Newsle                           | etter   |   |                                   | e 8  |
|---|---|---|-----------------------------------|--|
| Step 3 of 3 - Edit t                    | hen send your e-ne                                | wsletter                                | View Saved E-Newsletters          | View Sent E-Newsletters  |
| Select Template                         | Delivery Details                                  | Edit & Send E-Newsletter                |                                   |  |
|   | -Newsletter, select a<br>I lines to edit that se  |   | ) from the drop down box. Onc     | e it appears, simply click   |
| Add Section:                            |   | Add                                     |                                   |  |
|   |   |   |                                   | *  |
|   |   | :: In this Issue ::                     | -                                 |  |
| Tuper                                   | ay, 13th December 20                              | 11                                      | 02 9209 4174 - office@agen        | they com au  |
|   |   |   | uz szos 4114 - <u>Unicelwaden</u> | 100.001.00   |
|   | Contact's first name,<br>nere to visit our websit |   |                                   | -  |
| 1 C C C C C C C C C C C C C C C C C C C | egards  | 0                                       |                                   |  |
| Your                                    | Agency  |   |                                   | The second s |
|   |   |   |                                   |  |
|   |   | 4 Cornwallis Street, Eveleig            |                                   |  |
|   | P: 02 92  | 09 4174   F: 02 9310 7232   E: <u>o</u> | ffice@agentbox.com.au             | -  |
| « Previous Ste                          | p Send for 1                                      | festing Save                            | Preview                           | Send Now   |

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.

| Send E-Newsle         | etter  |  |                                   | •                          |
|-----------------------|--|--|-----------------------------------|----------------------------|
| Step 3 of 3 - Edit th | hen send your e-ne                               | wsletter                                 | View Saved E-Newsletters          | View Sent E-Newsletters    |
| Select Template       | Delivery Details                                 | Edit & Send E-Newsletter                 |                                   |                            |
|                       | -Newsletter, select a<br>I lines to edit that se | nd add your desired section(s)<br>ction. | from the drop down box. Onc       | e it appears, simply click |
|                       |  | Not interested anymore? U                | nsubscribe                        | ń                          |
| -                     | GENTEO   | ×  | Newslette                         | r Update 👘                 |
|                       |  | :: In this Issue :: - New:               | s Items                           |                            |
| Hello I               | CASY.  | 19<br>                                   | 02 9209 4174 - <u>office@agen</u> | <u>tbox.com.au</u>         |
| « Previous Ste        | p Send for 1                                     | esting Save                              | Preview                           | Send Now                   |

3. Click on the Custom Upload icon 奏

| ::Edit this Se              | ::Edit this Section: News Item   |  |  |  |  |  |  |
|-----------------------------|--|--|--|--|--|--|--|
| Headline: *<br>Description: | Agentbox Support is Here to Help         B       J         Image: Support is Here to Help         Image: Support is Here to Help |  |  |  |  |  |  |

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.

0

| Browse Files     |                  |        |
|------------------|------------------|--------|
|                  | Overall progress |        |
|                  |                  | 0%     |
|                  | File Progress    |        |
|                  |                  | 0%     |
|                  |                  |        |
| Clear List       |                  | Upload |
| elected Files :: |                  |        |

4. Select Browse and select the image you want to upload and click Open.

| Look in:     | Agentbox       |                             | 3 🗊 🛤 🖬 |   |        |
|--------------|----------------|-----------------------------|---------|---|--------|
| Ca           | Market Re      | port                        |         |   |        |
| ecent Places | Market Re      | port                        |         |   |        |
| Decktor      |                |                             |         |   |        |
| Desktop      |                |                             |         |   |        |
| Libraries    |                |                             |         |   |        |
|              |                |                             |         |   |        |
| Computer     |                |                             |         |   |        |
|              |                |                             |         |   |        |
| Network.     |                |                             |         |   |        |
|              | File name:     | Market Report               | <br>    | Ŧ | Open   |
|              | Files of type: | Image only (*.gif, *.jpg, * | <br>    |   | Cancel |

5. Click Upload

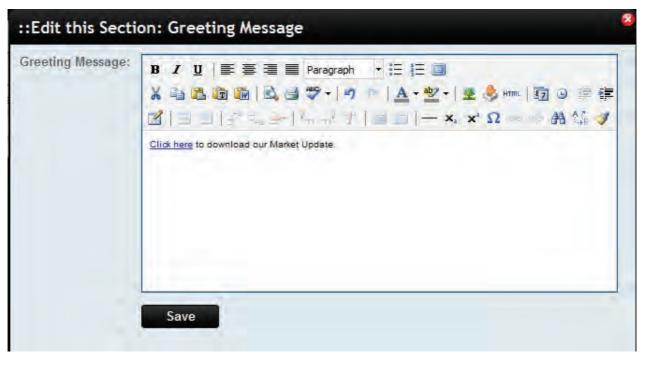
6. Type the text you would like to link, then highlight to select the text

| ::Edit this Section | on: Greeting Message  |  |
|---------------------|---|--|
| Greeting Message:   | B Z U   E E E Paragraph ↑ E E II<br>X A A A A A A A A A A A A A A A A A A A |  |
|                     | Save  |  |

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'

| Link URL<br>Link list |                                 |
|-----------------------|---------------------------------|
| Anchors               | Market Report.pdf               |
| Target<br>Title       | Website Links                   |
| Class                 | Not set                         |
| Save Link?            | which template? 💓 which user? 💌 |
|                       |                                 |
|                       |                                 |
|                       |                                 |

8. Click insert



9. Click Save

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 7.

| Send E-Newsle        | etter  |                          |                                   | 88                         |
|----------------------|--|--------------------------|-----------------------------------|----------------------------|
| Step 3 of 3 - Edit t | hen send your e-ne                               | wsletter                 | View Saved E-Newsletters          | View Sent E-Newsletters    |
| Select Template      | Delivery Details                                 | Edit & Send E-Newsletter |                                   |                            |
|                      | -Newsletter, select a<br>d lines to edit that se |                          | from the drop down box. Onc       | e it appears, simply click |
| -                    | AGENT <mark>BO</mark> )                          | <.                       | Newslette                         | r Update                   |
|                      |  | :: In this Issue ::      | \$                                | E                          |
| Tuesd                | lay, 13th December 20                            | 11                       | 02 9209 4174 - <u>office@agen</u> | tbox.com.au                |
| Hello                | Contact's first name,                            |                          |                                   |                            |
| Click                | here to download our N                           | larket Update.           |                                   | £                          |
|                      | egards<br>Agency                                 |                          |                                   |                            |
| 144                  |  |                          |                                   |                            |
| « Previous Ste       | p Send for 1                                     | esting Save              | Preview                           | Send Now                   |

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

|         |     |               |                      | disp |
|---------|-----|---------------|----------------------|------|
|         |     |               |                      | pag  |
| Settled | n/a | For Sale Only | The sale has settled | con  |
|         |     |               |                      | ban  |
|         |     |               |                      | web  |

# 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"

| Login                |
|----------------------|
| word?                |
| john@agentbox.com.au |
|                      |

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 <u>Change Password</u> 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.

| :: Listin  | g:#1P0  | 008 - 654    | Victo    | oria Street, Sydi     | ney           |              | 98        |
|------------|---|--------------|----------|-----------------------|---------------|--------------|-----------|
| i d        |   |              | 0        |                       |               | 120          | Full View |
| General    | For Sale  | Features     | OFI      | Agents & Contacts     | Resources     | Commission   |           |
| Property   | Photos   Flo  | oorplans   D | )ocume   | nts   Links           |               |              |           |
| Agree      | cy Agreemer<br>ment Upload<br>rty Contract<br>ract Upload | Please e     |          | at a document does no |               |              |           |
| -          | nability Dec<br>ation Upload                              |              | nsure th | at a document does no | ot exceed 5MB | in filesize. |           |
| - Contract | Documents<br>ent(s) Upload                                |              | nsure th | at a document does no | ot 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



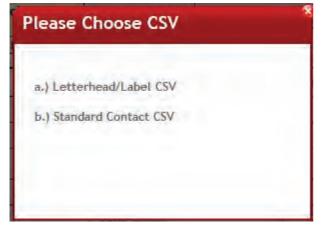
3. Using the Advanced Search tool, search for the contacts you would like you download.

| :: Advanced Co  | ntact Search : New Search  | 4              |
|-----------------|--|----------------|
| New Search      |  | Saved Searches |
| Contact Search  | # <del>-</del>   |                |
| First Name:     | Last Name:   |                |
| Home Phone:     | Mobile:  |                |
| Email:          | Company:   |                |
| Address:        | Suburb:  |                |
| Custom Filters: | edit Have Email  |                |
| Subscribe To:   | <ul> <li>Auction Reminders</li> <li>Newsletters</li> <li>OFI Times</li> <li>Property Updates</li> <li>Salas Desults</li> </ul> | * E *          |
| Sale/Rental:    | Search   |                |

| New Search     | Search Results | Refine Search  | Saved          | Searches     |
|----------------|----------------|----------------|----------------|--------------|
| Sort By: Conta | act Name: A-Z  | -              |                |              |
| Contact        |                | Assigned Staff | Last Contacted | Contact Info |
| Gary Brown     |                | John Smith     |                | @ CER        |
| Michael Johns  | on             | John Smith     | 02/11/11       | QMZ          |
| Sam Jones      |                | John Smith     |                | 0 BR         |
| Samantha Jon   | es             | John Smith     | 10/11/11       | 0 MIZ        |
| Mary May       |                | John Smith     | 11/11/11       | QEZ          |
| Charles Robert | s              | John Smith     |                | 012          |

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 <u>postal address</u> (if one exists), else Title, First Name, Last Name, Company Name and <u>residential address</u>.

|   | A                     | В                   | С |
|---|-----------------------|---------------------|---|
| 1 | Salutation            | Letter Head         |   |
|   |                       | Miss Mary May       |   |
|   |                       | 1 Miles Road        |   |
|   |                       | Camperdown NSW      |   |
| 2 | Miss Mary May         | 2050                |   |
|   |                       | Mr Michael Jones    |   |
|   |                       | PO Box 456          |   |
| 3 | Mr Michael Johnson    | Sydney NSW 2000     |   |
|   |                       | Mr Sam Jones        |   |
|   |                       | Sj Photography      |   |
|   | and the second second | 72 Monash Road      |   |
| 4 | Mr Sam Jones          | Sydney NSW 2000     |   |
|   | 1.2                   | Miss Samantha Jones |   |
|   |                       | 7 Smith Street      |   |
| 5 | Sammy                 | 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.

| 0 | A     | В         | C         | D                  | E            | F            | G            | н            | I.          | 1               | K           | L      | M        | N         | 0              | P             | Q       |
|---|-------|-----------|-----------|--------------------|--------------|--------------|--------------|--------------|-------------|-----------------|-------------|--------|----------|-----------|----------------|---------------|---------|
| 1 | Title | First nam | Last Name | Preferred Name     | Email        | Mobile       | Phone        | Work Phone   | Company     | Address         | Suburb      | State  | Postcode | Letter He | Assigned Staff | Contact Class |         |
| 2 | Miss  | Mary      | May       | Miss Mary May      | mm@hotma     | 0411 222 555 | 02 9209 4174 | 02 9523 5642 |             | 1 Miles Road    | Campero     | dc NSW | 2050     | Miss      | Jane Smith     | Buyer;Vendor  | r;Deve  |
| 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  | r       |
| 4 | Mr    | Sam       | Jones     | Mr Sam Jones       | sam@hotma    | 0452 333 666 | 02 9854 6596 |              | Sj Photogra | a 72 Monash Roa | a Sydney    | NSW    | 2000     | Mr Sam    | Jane Smith     | Buyer;Supplie | er;Hot  |
| 5 | Miss  | Samantha  | Jones     | Sammy              | samantha@h   | 0425 135 698 | 02 9856 4523 |              |             | 7 Smith Street  | Sydney      | NSW    | 2000     | Miss      | Jane Smith     | Buyer;Vendor  | r;Hot B |
| 6 | Mr    | Thomas    | Train     | Mr Thomas Train    | tt@hotmail.c | 0452 333 653 |              |              | Signboards  | 52 Elizabeth St | r Surry Hil | Is NSW | 2010     | Mr        | Jane Smith     | Vendor;Owne   | er Occu |
| 7 | Mr    | Gary      | Brown     | Mr Gary Brown      | gary.brown@  | 0456 231 528 |              |              |             | 17 Tranmere S   | t Gosford   | NSW    | 2250     | Mr Gary   | Jane Smith     | Buyer;Vendor  | r;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 your 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

| :: Staff : J   | ane Thomas   |                               |       |                      |            |                    |                      | 6  |
|--|--------------|-------------------------------|-------|----------------------|------------|--------------------|----------------------|----|
| Staff Details  | Staff Photos | Access                        | Tasks | Contacts             | Properties | Targets            | Debits/Credits       |    |
| Status:<br>First Name: *                                 | Curren       | ıt                            |       | ]<br>Last Nam        | ie:*       | Thomas             | ]                    | ŕ  |
| Job Title:<br>Birthday:<br>Start Date:<br>Qualification: | 01           | Representa<br>] [<br>] [09 [2 | tive  |                      |            |                    |                      | Į. |
| Team(s):   |              |                               |       | 1                    |            |                    |                      |    |
| Specialist Are   | eas:         |                               |       | adn                  |            |                    |                      |    |
| License/Rego<br>Contact No.:                             | No.:         |                               |       | Expiry Da<br>Mobile: |            | 0 0<br>0400 000 00 | 00<br>Do enable SMS) |    |
| Email: *<br>Home Addres                                  |              | agentbox.c                    | om.au | ]                    |            | 00000 100 11       | ondure sm3/          |    |

#### 3. Click Save

- 4. Go to the Access tab
- 5. Tick the SMS Access Permission check box

| Staff Details Staff Photos Access Tasks Contacts Properties Targets Debits/Cretilits  | _   |
|---|-----|
|   |     |
| Permission Level: Sales Manager  Password: Reset Permissions :: Permission To:  | Ţ   |
| Permission ro:       Access Account History       Create New Property         Access Bulk Upload Facility       Download Contact CSV         Add a Meeting       Edit a Contact         Add a Note       Edit All Contacts         Add a Task       Edit All Properties         Archive a Contact       Search & View All Contacts         Archive a Property       Send E-Newsletters         Create and View Reports       Share Contacts         Create Media       Share Contacts | II. |

- 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

| egistering               | SMS Account  |
|--------------------------|--|
| An SMS message<br>000,   | e has been sent to 0400 000                            |
|                          | e password in the SMS to<br>obile number to enable SMS |
| Password:*<br>Save Cance |  |

- 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 : Jan   | e Thomas       |                                |       |                       |              |                          |               | 18 |
|--|----------------|--------------------------------|-------|-----------------------|--------------|--------------------------|---------------|----|
| Staff Details  | taff Photos    | Access                         | Tasks | Contacts              | Properties   | Targets                  | Debits/Credit | s  |
| Status:<br>First Name: *                                 | Currer<br>Jane | nt                             |       | ]<br>Last Nam         | ie:*         | Thomas                   |               | I. |
| Job Title:<br>Birthday:<br>Start Date:<br>Qualification: | Sales<br>01    | Representa<br>] [<br>] [09] [2 | tive  |                       |              |                          |               | 1  |
| Team(s):   |                |                                |       | ]                     |              |                          |               |    |
| Specialist Areas   |                |                                |       | adn                   |              |                          |               |    |
| License/Rego No  |                |                                |       | ] Expiry Da           | ite:         | 0 0                      |               |    |
| Contact No.:   |                |                                |       | ] Mobile:<br>☑ Enable | SMS for this | 0400 000 00<br>mobile nu |               |    |
| Email: *<br>Home Address:                                | jane@          | agentbox.c                     | om.au |                       |              |                          | 3             | 1  |

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?
  - $_{\odot}$  Photos: max 5MB in file size and the minimum dimensions of that photo are no smaller than 800px wide x 600px high.
  - $_{\odot}$  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?
  - $_{\odot}$   $\,$  To check go to Tools
  - $_{\rm O}$   $\,$  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?
  - $_{\odot}$  If the file is located on an external server this may cause issues.
  - $_{\odot}$   $\,$  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?

- $_{\rm O}$   $\,$  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.

|       | YOUR AGENCY                 |
|-------|-----------------------------|
| Login |                             |
|       |                             |
|       |                             |
| Login | 1                           |
| -     | mobisupport@agentbox.com.au |
|       | © 2011 - Agentbox           |
|       |                             |
|       |                             |
|       |                             |
|       |                             |
|       |                             |
|       |                             |

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, their 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.

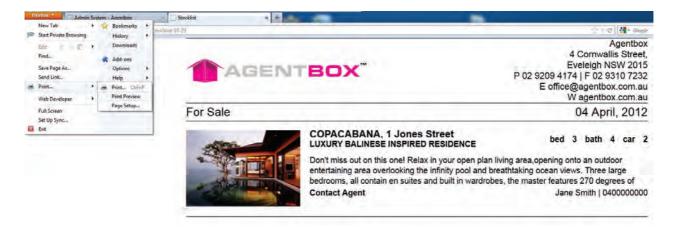
5. We will use the initial data to test the import and if it is ok we will activate the automatic import at our end and confirm by email that your new feed is active.

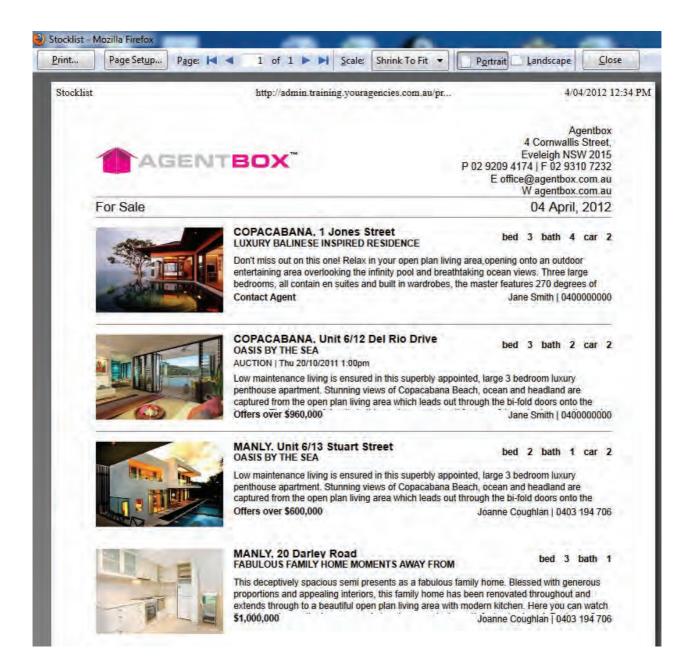


## **Print Settings**

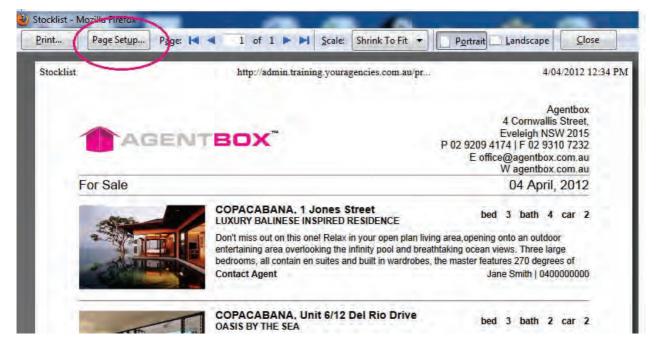
# How do I remove URL details and the footer from the Property Stocklist?

- 1. Click on File on the top left corner of your Mozilla Firefox browser.
- 2. Select Print preview





3. Click on Page Setup



4. Ensure Print Background (colours & images) is ticked.

| ormat & Options        | Margins & Header/Footer              |
|------------------------|--------------------------------------|
| Format<br>Orientation: | Dortrait O Landscape                 |
| <u>S</u> cale: 80      | % 👿 Shrink to fit Page <u>W</u> idth |
| Options                |                                      |
| Print Backg            | round (colours & images)             |
|                        |                                      |
|                        |                                      |

5. Click on Margins & Header/Footer

| rmat & Options          | Margins & Header  | /Foote | er     |   |
|-------------------------|-------------------|--------|--------|---|
| Margins (millim         | netres)           |        |        |   |
|                         | <u>T</u> op: 12.7 | 1      |        |   |
|                         |                   |        |        |   |
| Left                    |                   | -      | ght:   |   |
| 12.                     | 7                 | 1.     | 2.7    |   |
|                         |                   |        |        |   |
|                         |                   | -1     |        |   |
|                         | Bottom: 12.7      |        |        |   |
| the shales in           | ters              |        |        |   |
| Headers & Foot          |                   | -      | URL    | + |
| Headers & Foot<br>Title |                   |        |        |   |
|                         | blank Centre:     | -      | Right: | 2 |
| Title                   |                   | -      |        | • |
| -                       |                   |        | 1.000  |   |

6. Change all other to --blank-- to eliminate all headers, footers and URL details.

| ormat & Options | Margins & Header/I | Footer           |
|-----------------|--------------------|------------------|
| Margins (millim | netres)            |                  |
|                 | <u>T</u> op: 12.7  |                  |
|                 |                    |                  |
| Left            |                    | <u>R</u> ight:   |
| 12.3            | 7                  | 12.7             |
| 4               |                    |                  |
| Headers & Foot  |                    |                  |
| Headers & Foot  | +blank             | ▼blank           |
| Headers & Foot  |                    | ✓blank<br>Right: |

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.

