Agentbox Training Manual

Table of contents

Welcome

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

How do I get support?

For any support enquiries please contact Support between 9am - 5pm Sydney time, Monday to Friday
Phone: (02) 9209 4174
Email: support@agentbox.com.au.

How do I get support after hours?

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

How do I organise more training?

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

System requirements

What software downloads will I need?

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

- Mozilla Firefox
- Adobe Flash Player
- Adobe Acrobat Reader

What internet connection will I need?

We recommend a minimum 1Mbps upload and 1 MBps download speed. You can test this at sites such as http://speedtest.net/
Once you have conducted the test, you will be advised of your current office download and upload speed.

Getting Started

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

[How do I log in to my Agentbox system?](#)
[How can I log out of my Agentbox system?](#)
[How do I change my password?](#)
[What do I do if I have forgotten my password?](#)

Log In

How do I log in?

1. Open the link to your new CRM e.g. http://admin.youragency.com.au ensuring you are using [Mozilla Firefox](#) as your web browser.

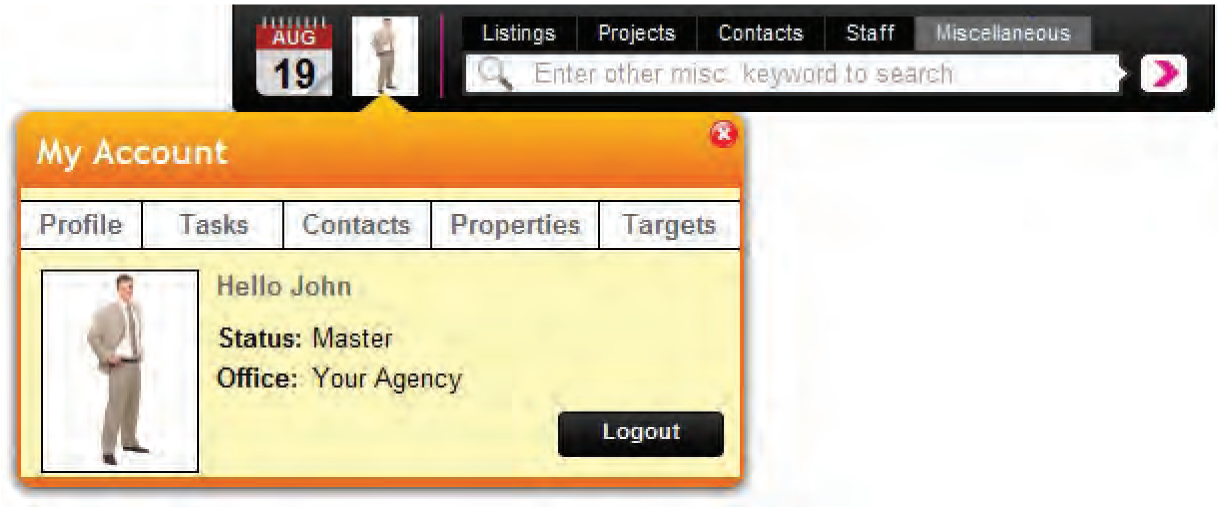
2. Enter your email address as your Username and the temporary password emailed to you.

3. Click 'Login'

Log out

How do I logout?

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



Accessing Your Profile

How do I access my profile?

There are two ways to access your profile:

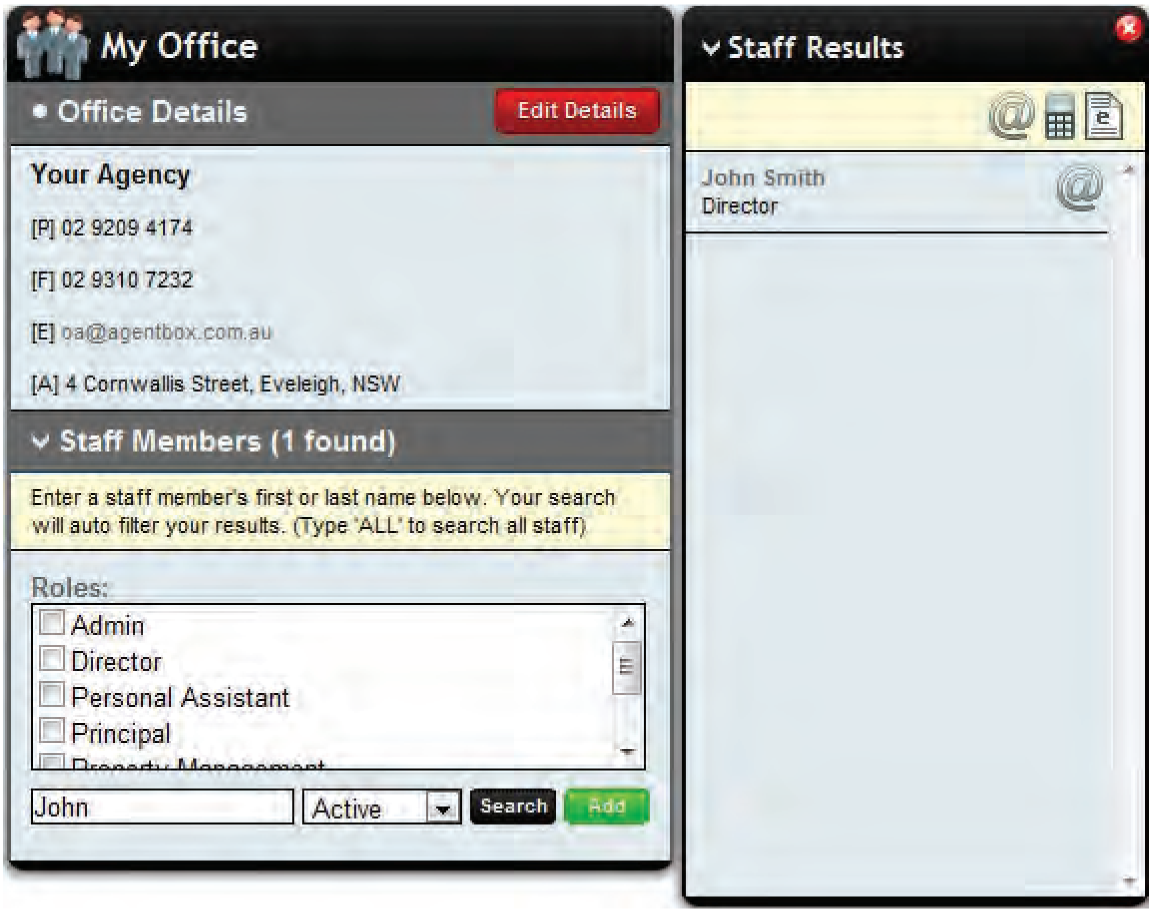
- Through My Office
- Through the Universal Search Bar

My Office

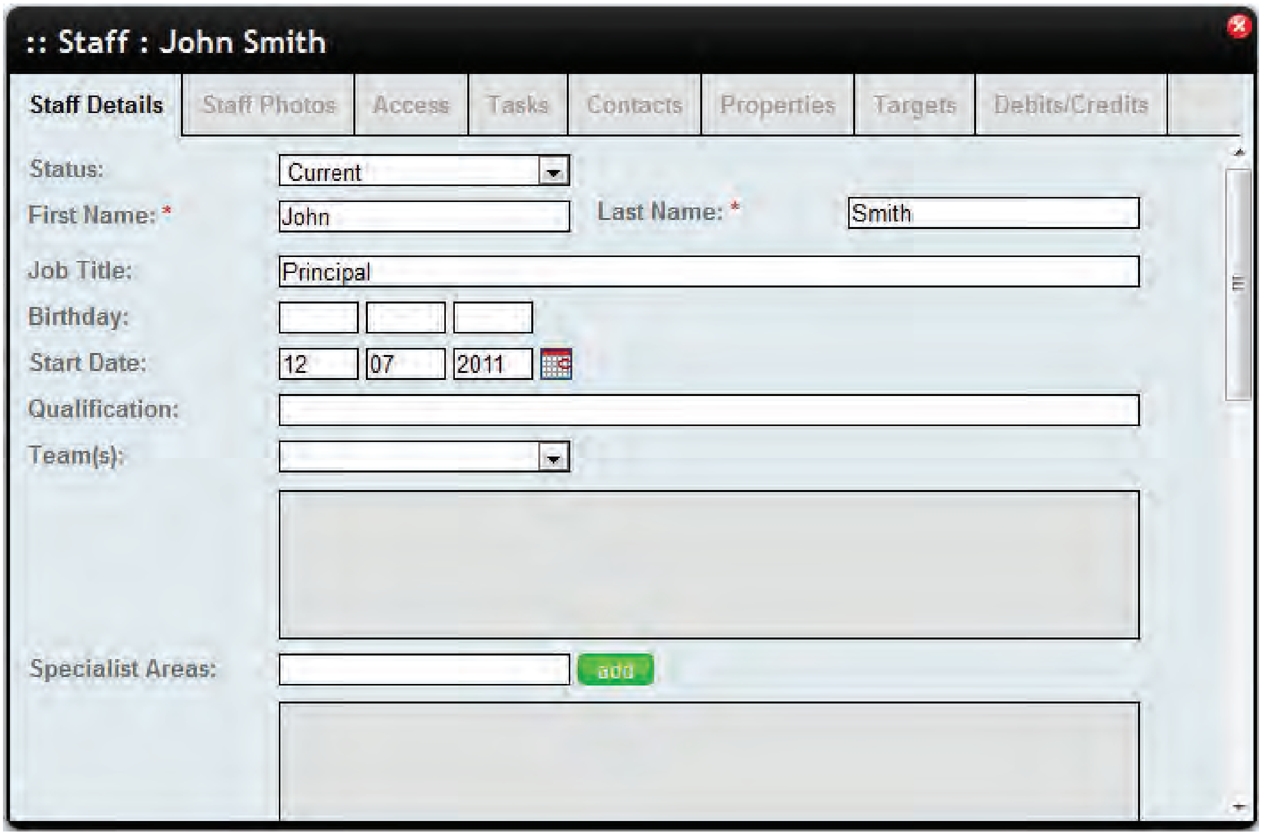
1. Click on the My Office icon from the Main Menu

2. Enter your First name or Surname

3. Click Search

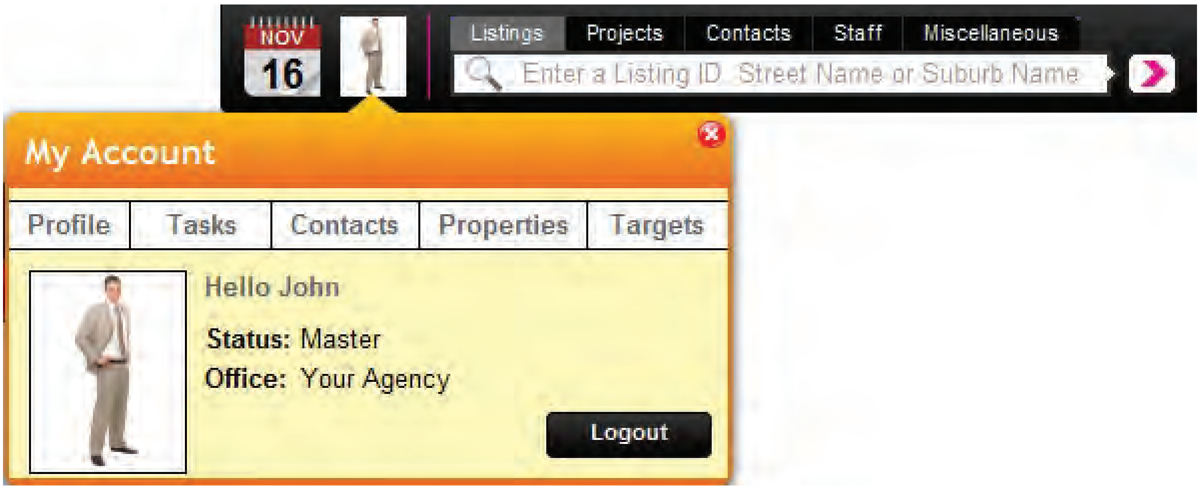


4. Click on your name from the Quick Finds Results Panel.

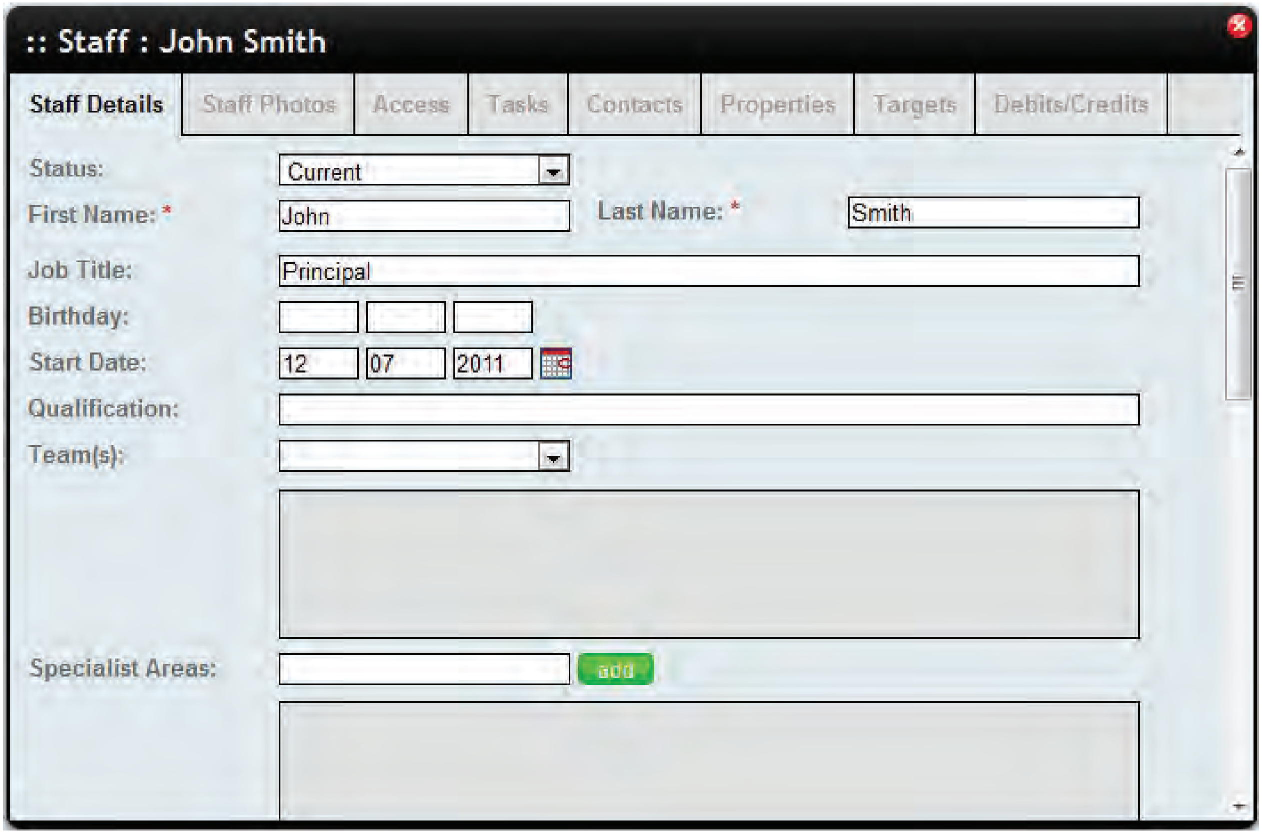


Universal Search Bar

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



2. Click on the Profile tab

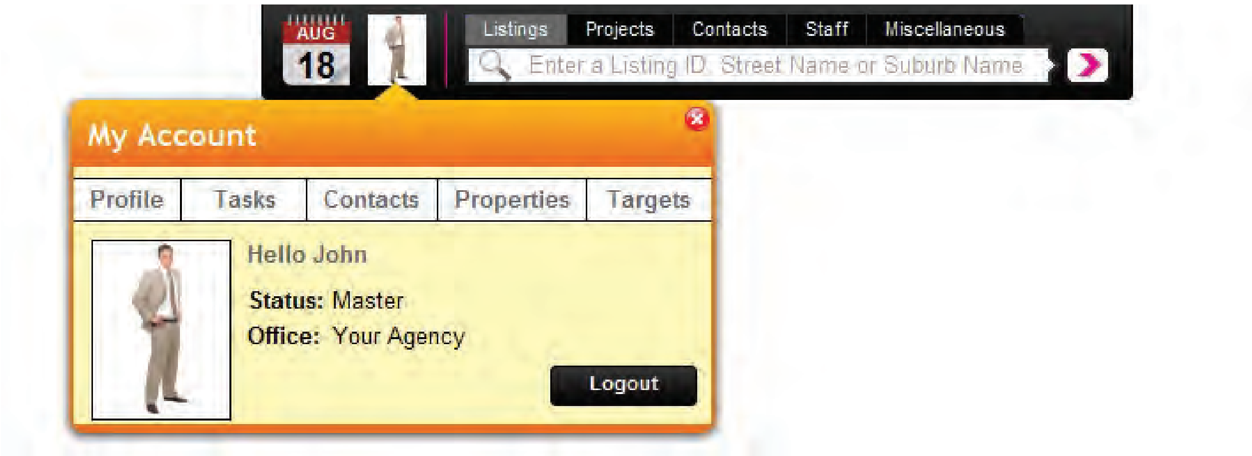


Change Password

How do I change my Password?

1. Click on your Profile Picture next to the Universal Search Bar

2. When 'My Account' Loads, Click on "Profile"

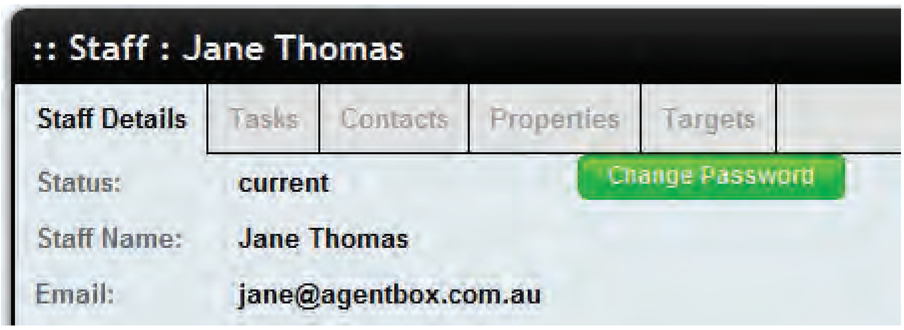


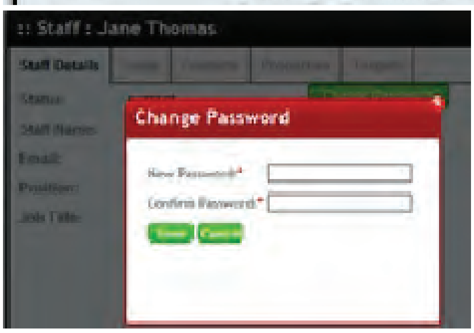
Standard User

1. Repeat steps 1 & 2 above

2. Click on the green 'Change Password' button

3. Enter a new password and click "Save"



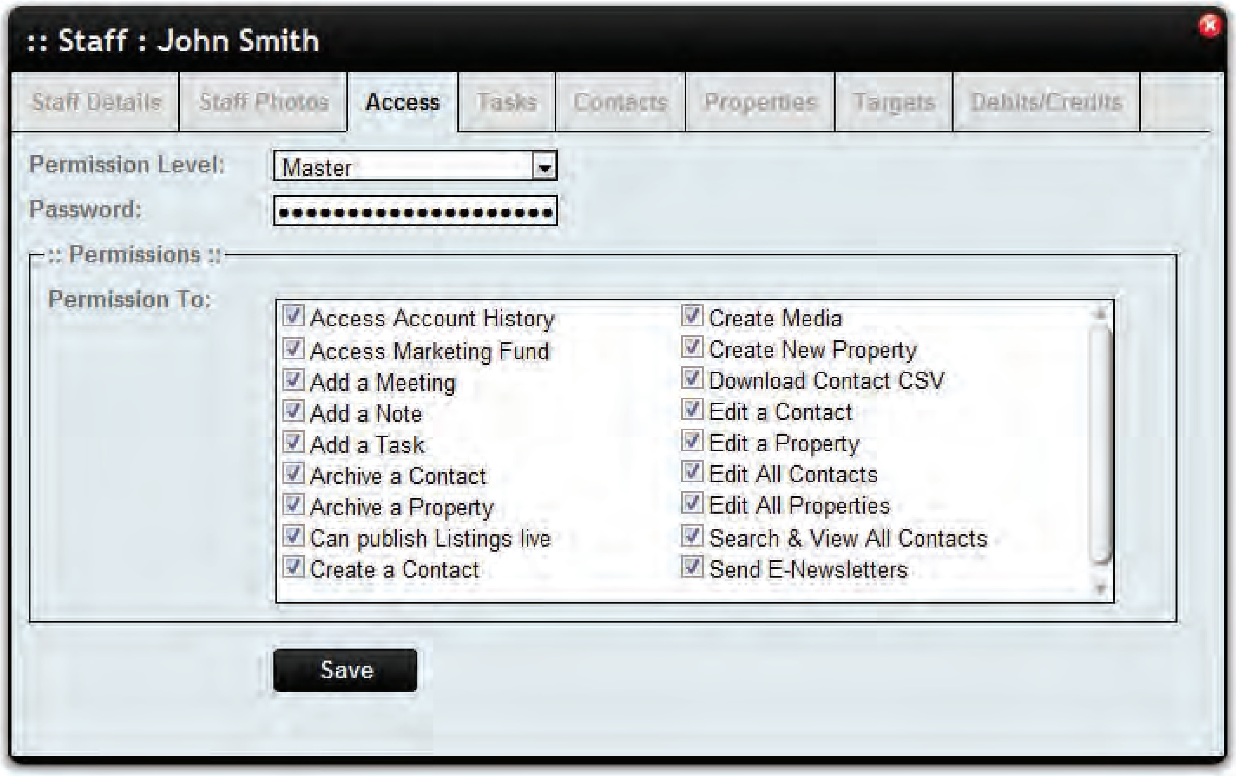


Master User

1. Repeat steps 1 & 2 above

2. When your staff card opens click on the 'Access Tab'

3. Enter a new password and click "Save"



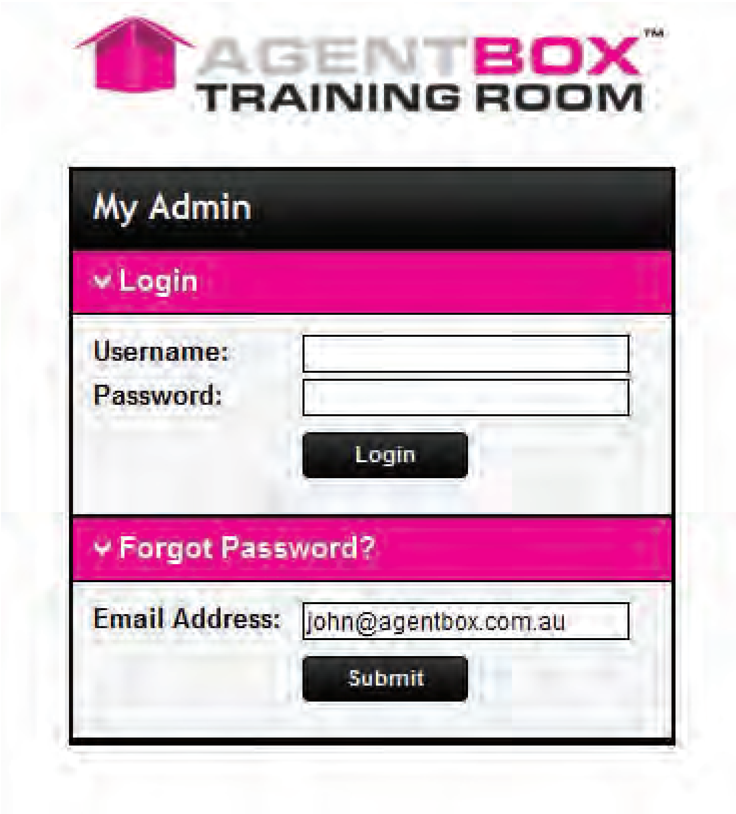
Forgot Password

I Forgot My Password

1. If you have forgotten your password click "Forgot Password" on the login page.

2. Enter your login email address and click "Submit"

3. A temporary password will be emailed to your email address
**Note: To activate the new password you must go through the log in link in the email.*


AGENTBOX™
TRAINING ROOM
My Admin
Login
Username:
Password:
Login
Forgot Password?
Email Address:
john@agentbox.com.au
Submit

The Dashboard

The Dashboard

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

Introduction to Dashboard
Panels
Help and Support
The Main Menu
The Universal Search Bar

Introduction to Dashboard

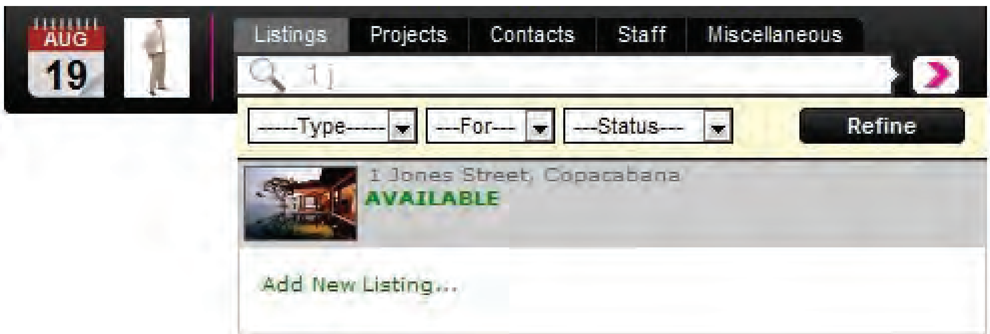
Introducing the Dashboard

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

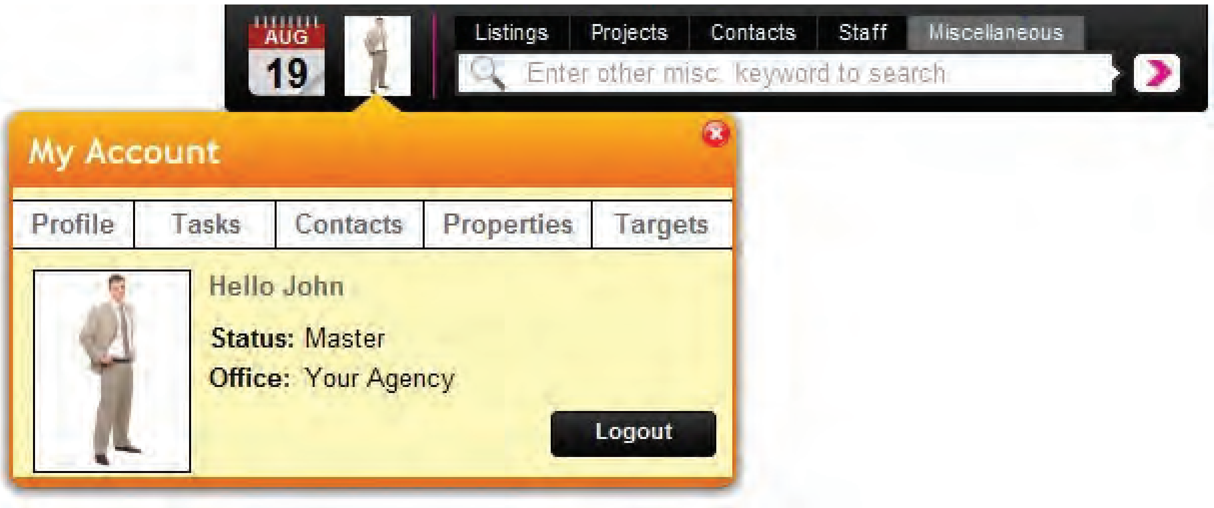
The Universal Search Bar

The Universal Search Bar

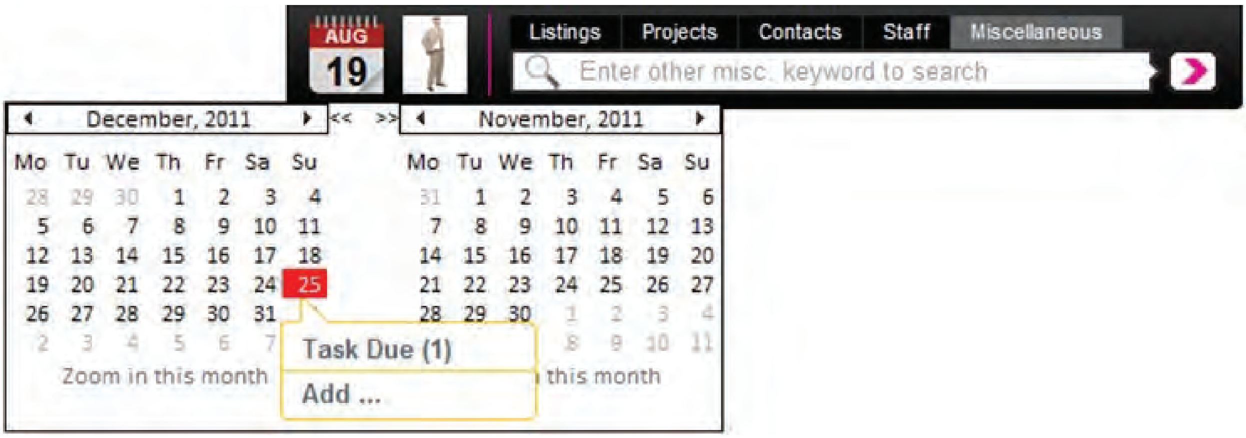
1. Quickly search and access your properties, projects, contacts and staff using a minimum 3 character search.



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



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



The Main Menu

The Main Menu

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

My Office

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

Properties

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

Contacts

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

Tasks

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

Website

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

Reports

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

Performance

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

Panels

Introducing the Panels

The system is made up of separate panels for easy navigation and the ability to overlap.
Left Panel
Fast Find Results Panel
Main Panel
Right Panel

Left Panel

Left Panel

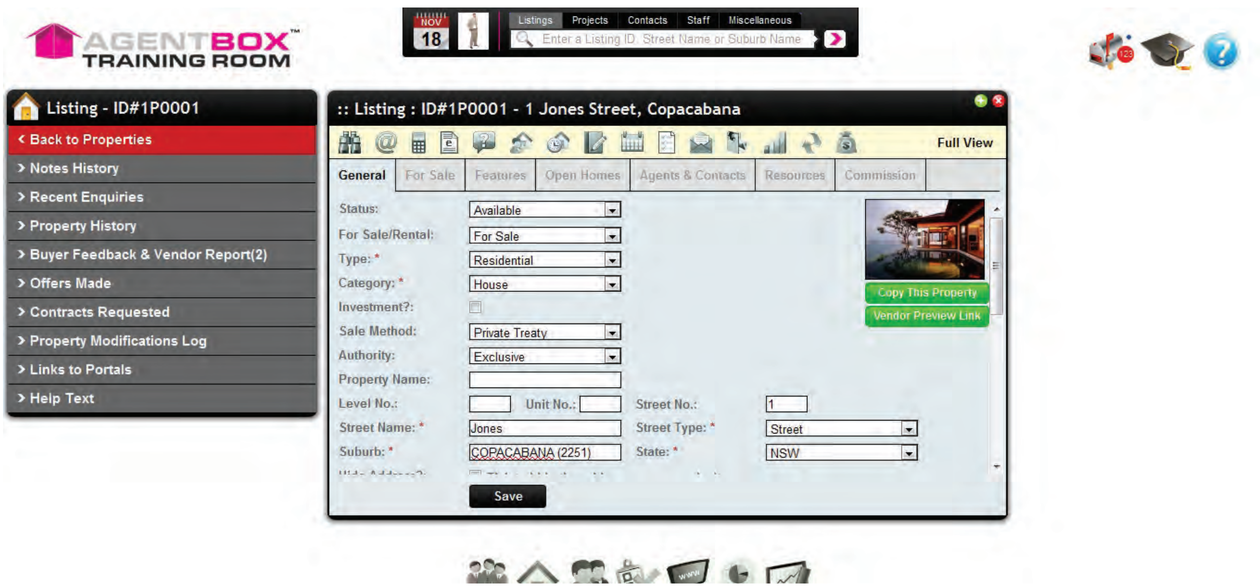
There are two uses for the left panel, the first is for searching and navigation and the second is to provide additional data and options when working on a property or contact in full view mode.

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

For example, click on Properties from the main menu

the matching property left panel will open.

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

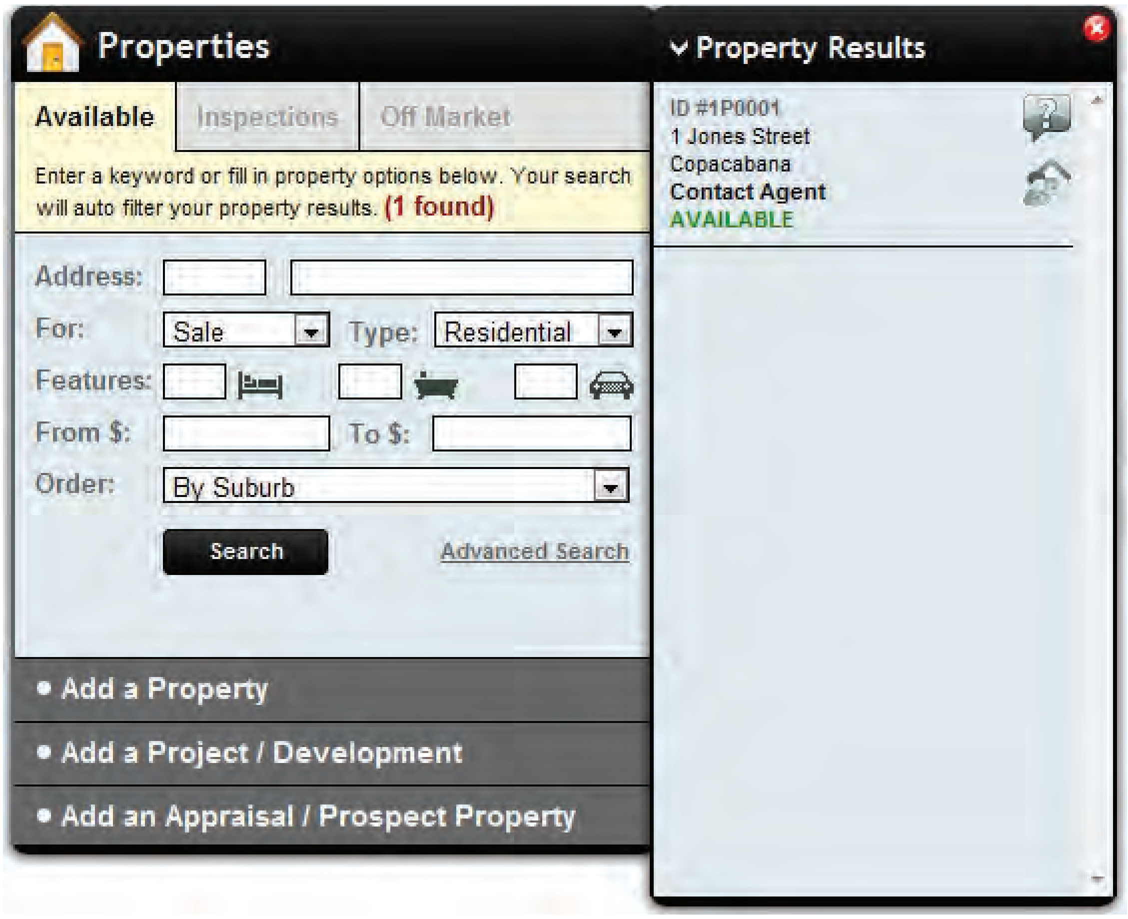


Results Panel

Quick Finds Results Panel

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

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

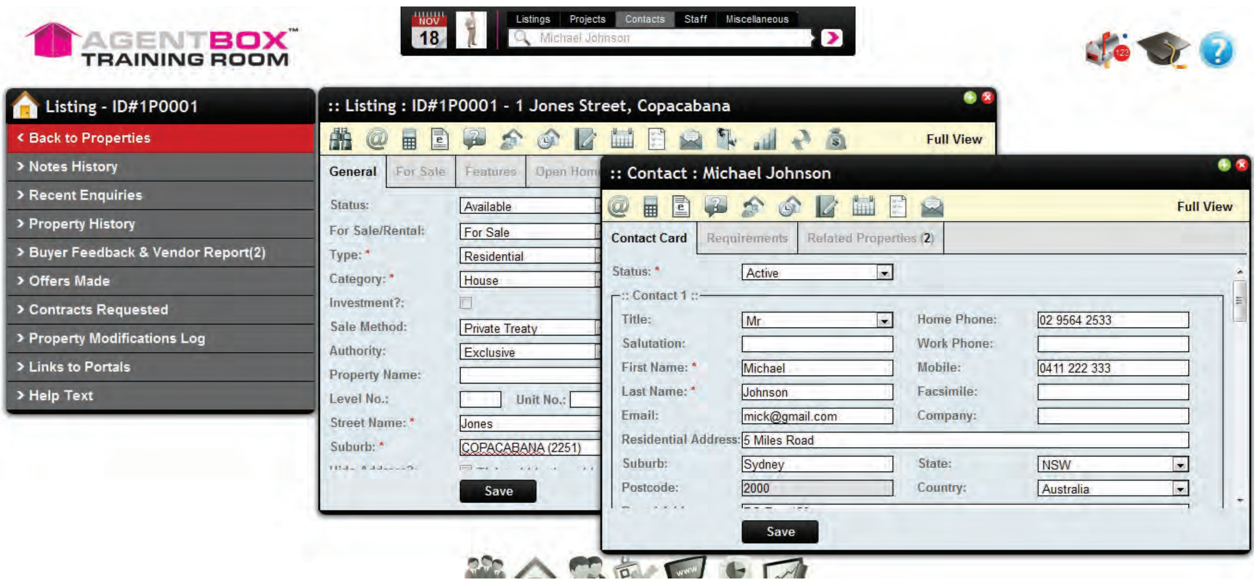


Centre Panel

Centre Panel

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

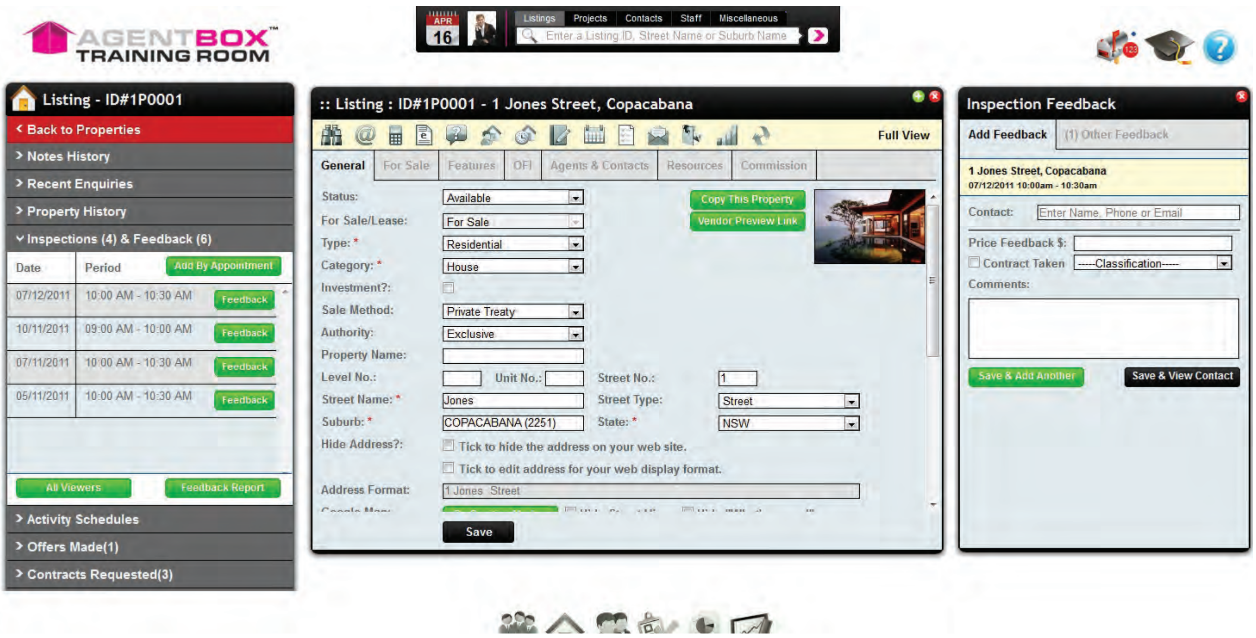
In this example we have opened a property card, then opened a contact on top using the Universal Search Bar to retrieve the contact.
To open up the matching left panel for the contact, we would need to click 'Full View' on the contact centre panel.



Right Panel

Right Panel

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



Help and Support

Help and Support

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

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

Training Hat - This is where you can access training materials
Help & Support - This area contains our help desk contact details and useful software download links.

My Office

My Office

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

How do I edit the Office contact details for letters, website, e-newsletters and digital media?
How do I log additional office income? - *For Franchise reporting only*
How do I add office supplier items for agent debit/credits?
How do I add/edit staff members?
How do I delete/archive a staff member?
- How do I transfer properties, tasks and contacts to a different staff member?

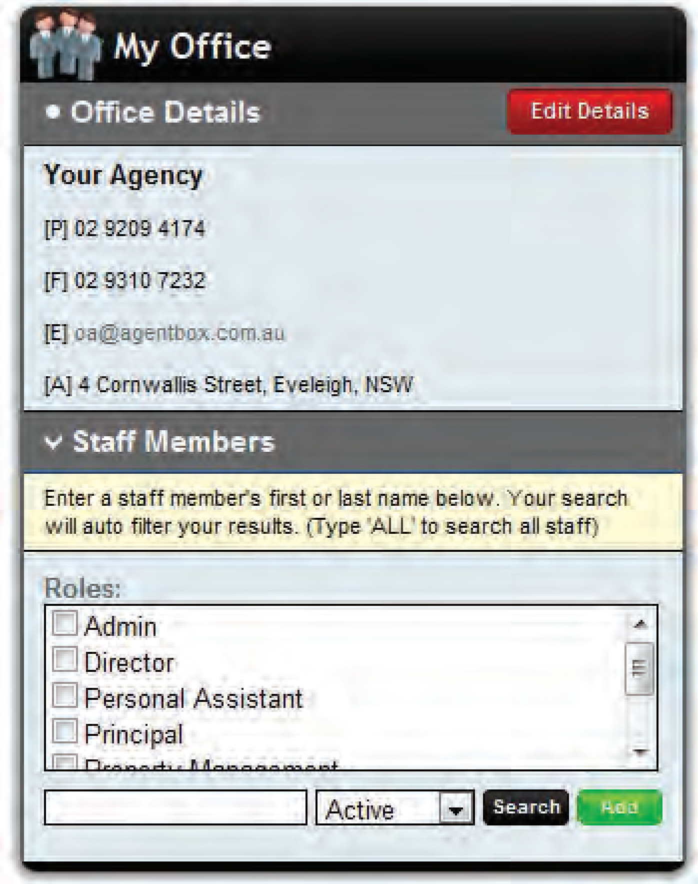
How do I change my password?
How do I communicate to other staff via sms or email?
How do I request a new portal feed?
How do I view portal logs?

Office Details

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

1. Click on My Office from the main menu.

2. Click on the red Edit Details button on the Left Panel



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

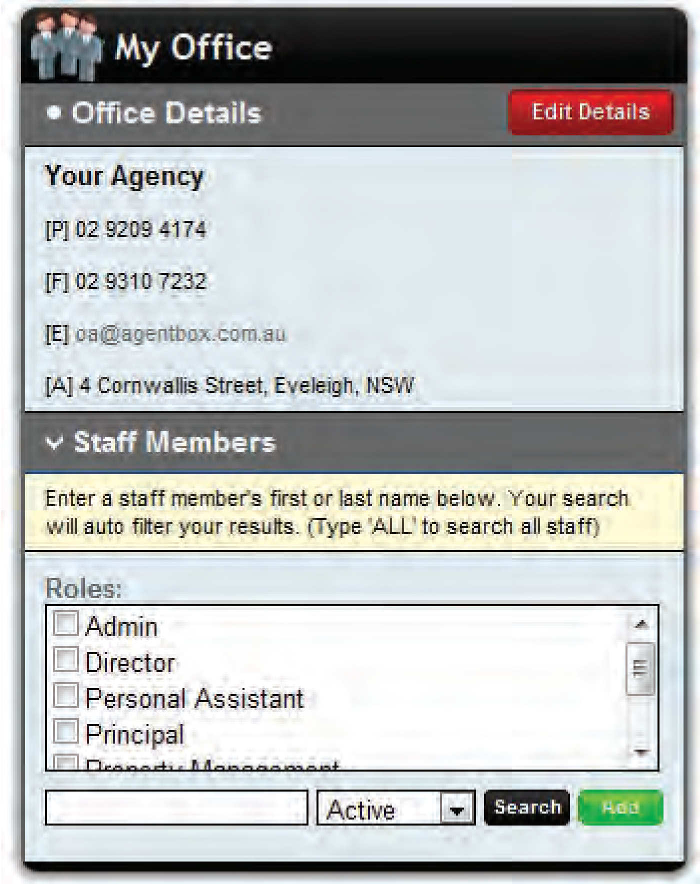
4. Click Save
**Note: If ticked, Enable SMS for office mobile number will allow users with access to send SMS the ability to select if they would like to send from their mobile number or the office mobile number.*

Additional office income

How do I log additional Office income?

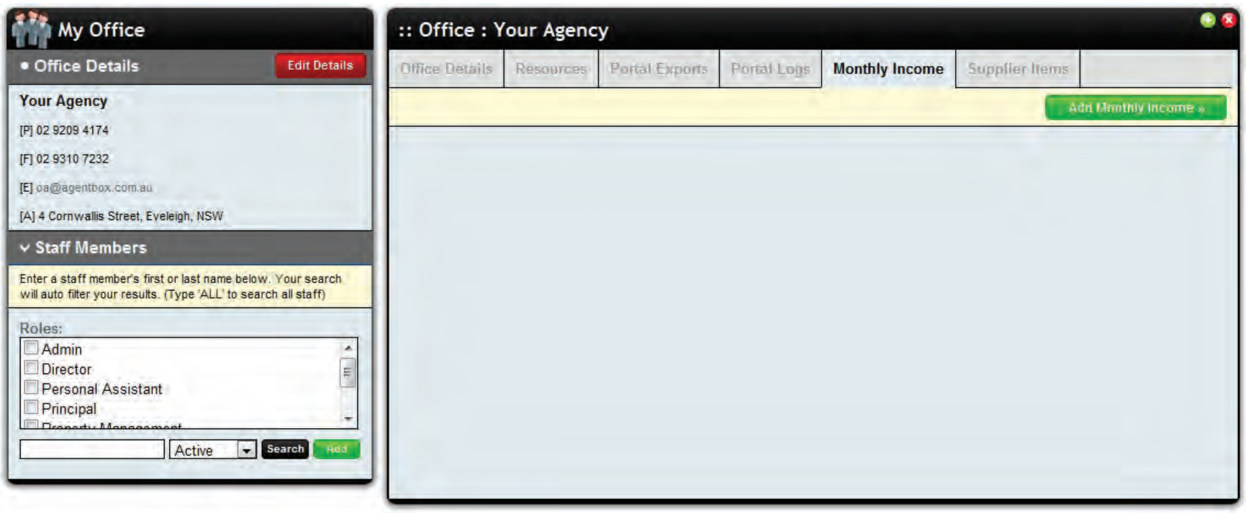
1. Click on My Office from the main menu.

2. Click the red Edit Details button on the Left Panel

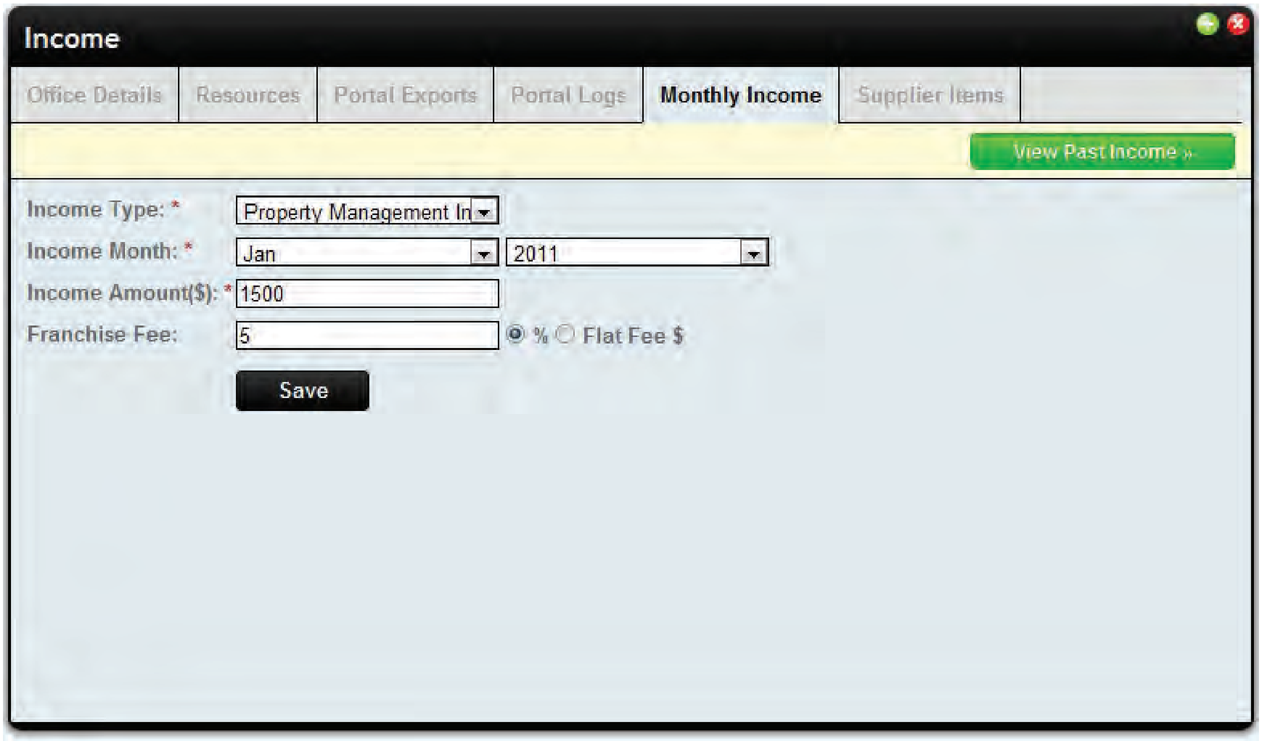


3. Click on the Monthly Income tab

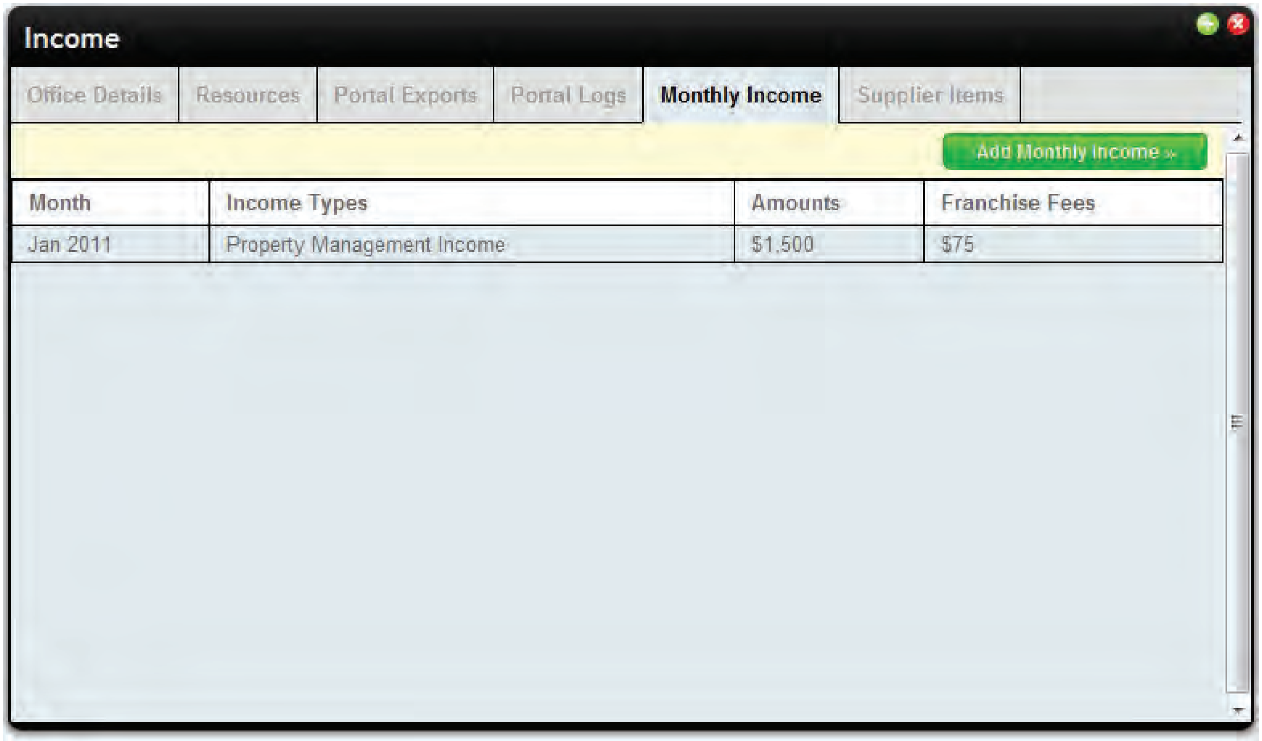
4. Click the green Add Monthly Income button.



4. Enter the income information



5. Click Save



Office supplier items

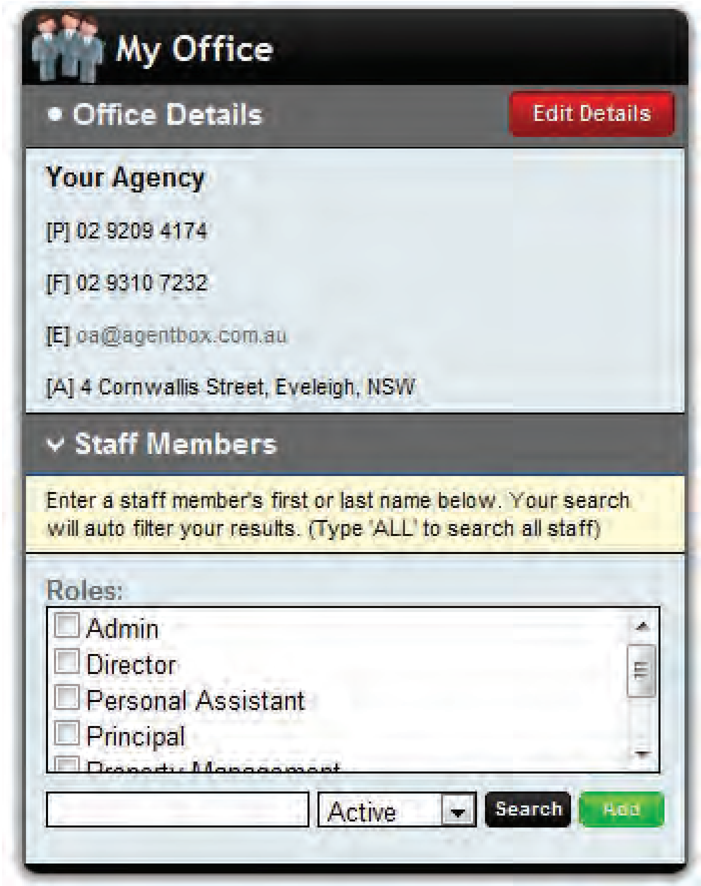
How do I add/edit office supplier items for agent debit/credits?

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

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

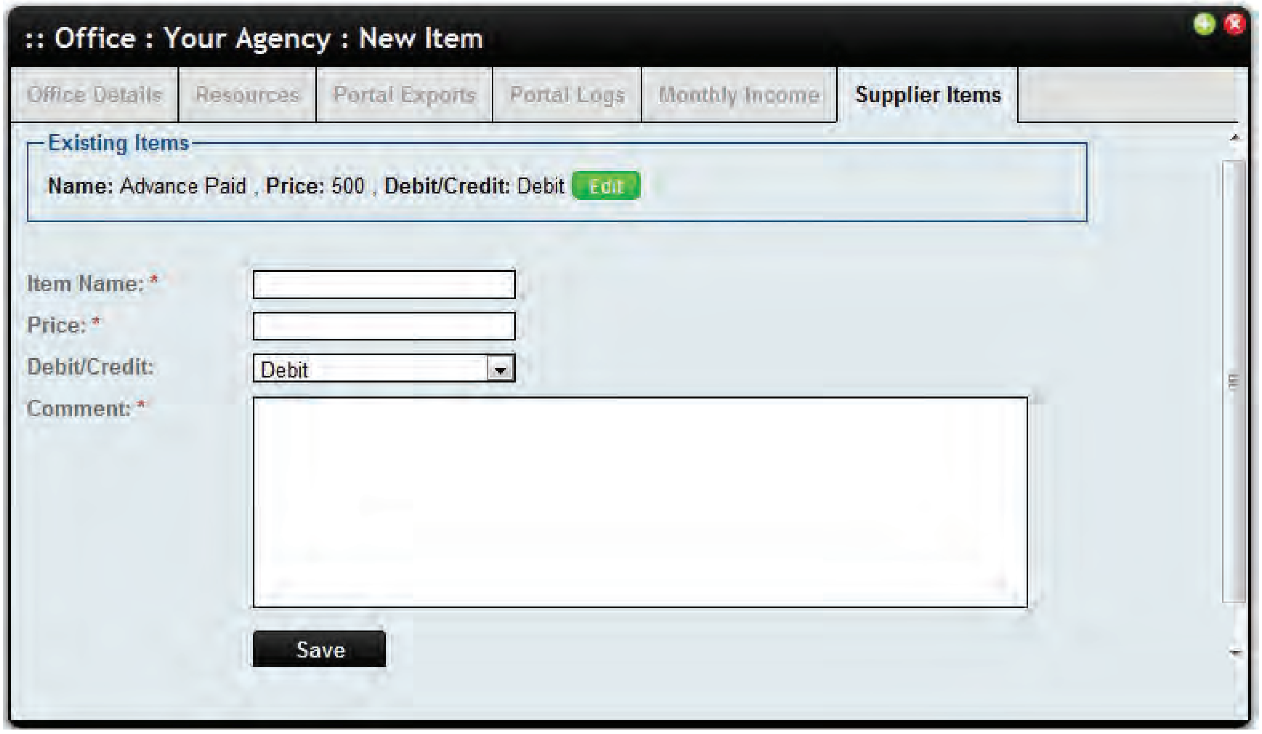
1. Click on My Office from the main menu.

2. Click the red Edit Details button on the Left Panel



3. Click on the Supplier Items tab

4. Enter in the new item details and hit save or hit the green edit button to edit an existing item

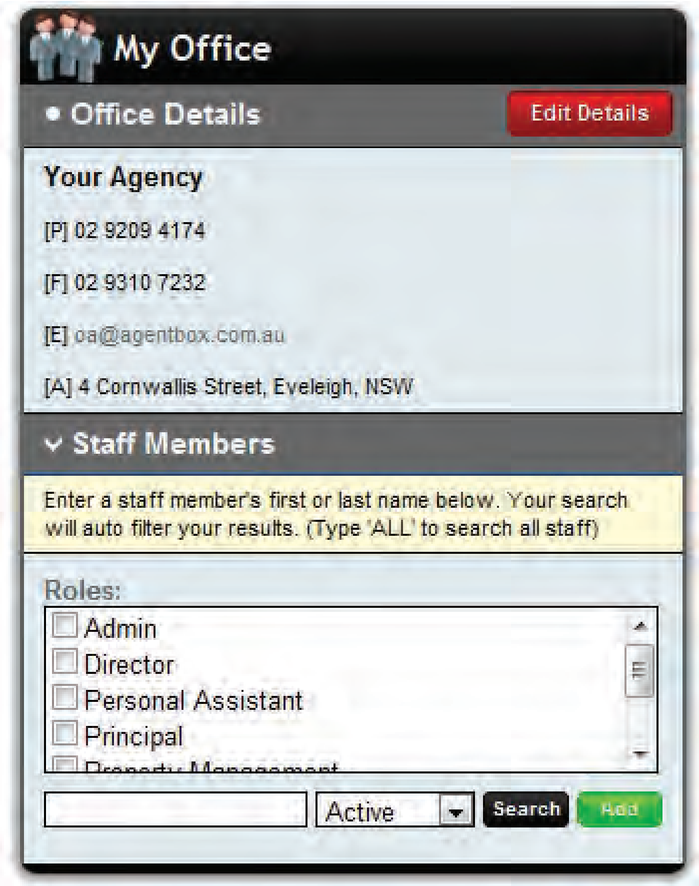


Add/Edit Staff

How do I add/edit staff members?

1. Click on My Office from the main menu.

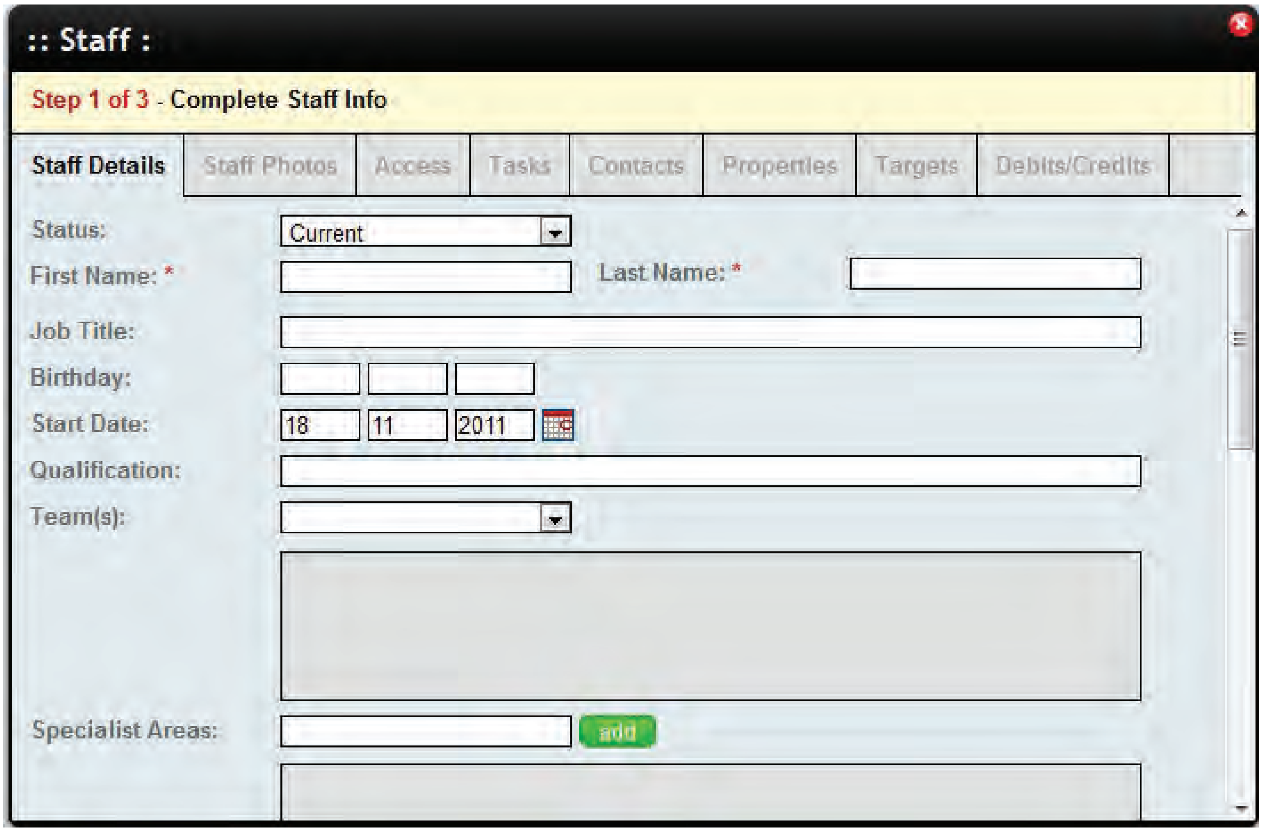
2. Click on the green Add button on the Left Panel and the staff card will appear.



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)

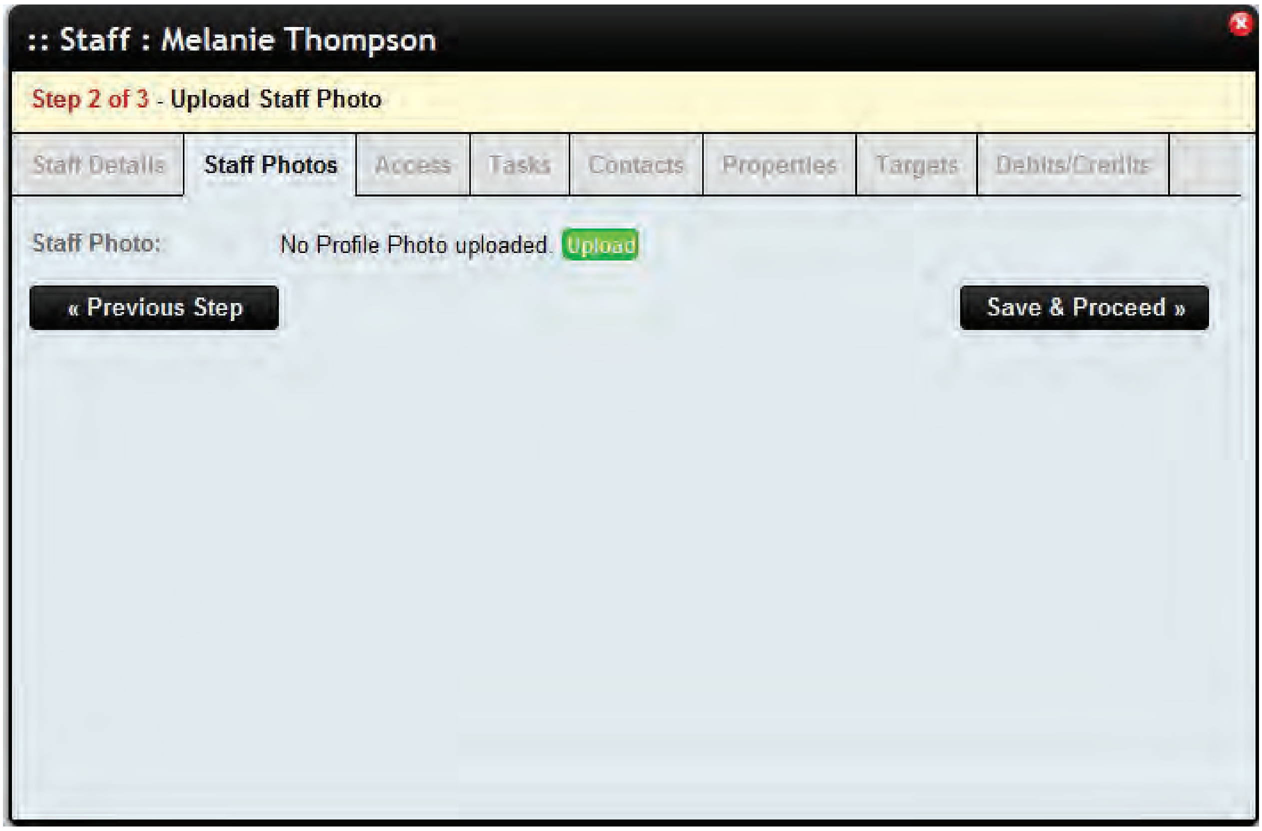
Status: - *Office Use Only, if you change the status to deleted you can reassign all contacts, tasks and properties to another staff member.*
First Name: * - *Public Display - Used on website, letters, e-newsletters etc*
Last Name: * - *Public Display - Used on website, letters, e-newsletters etc*
Job 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.*

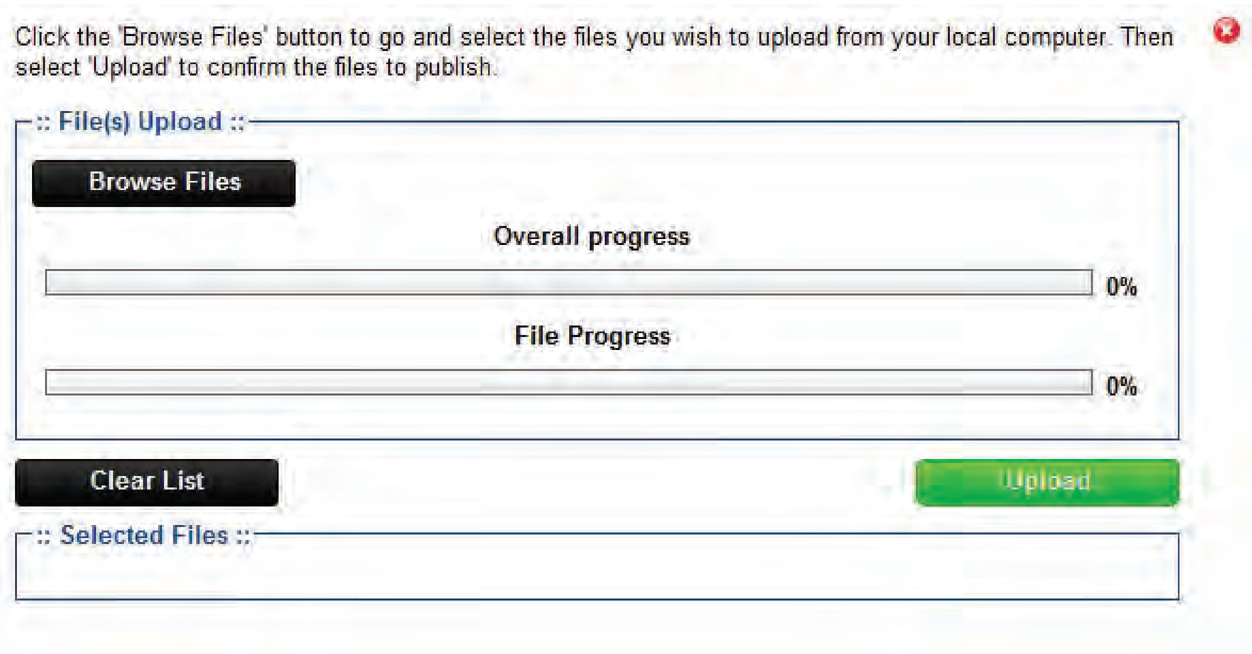


4. Save and Proceed

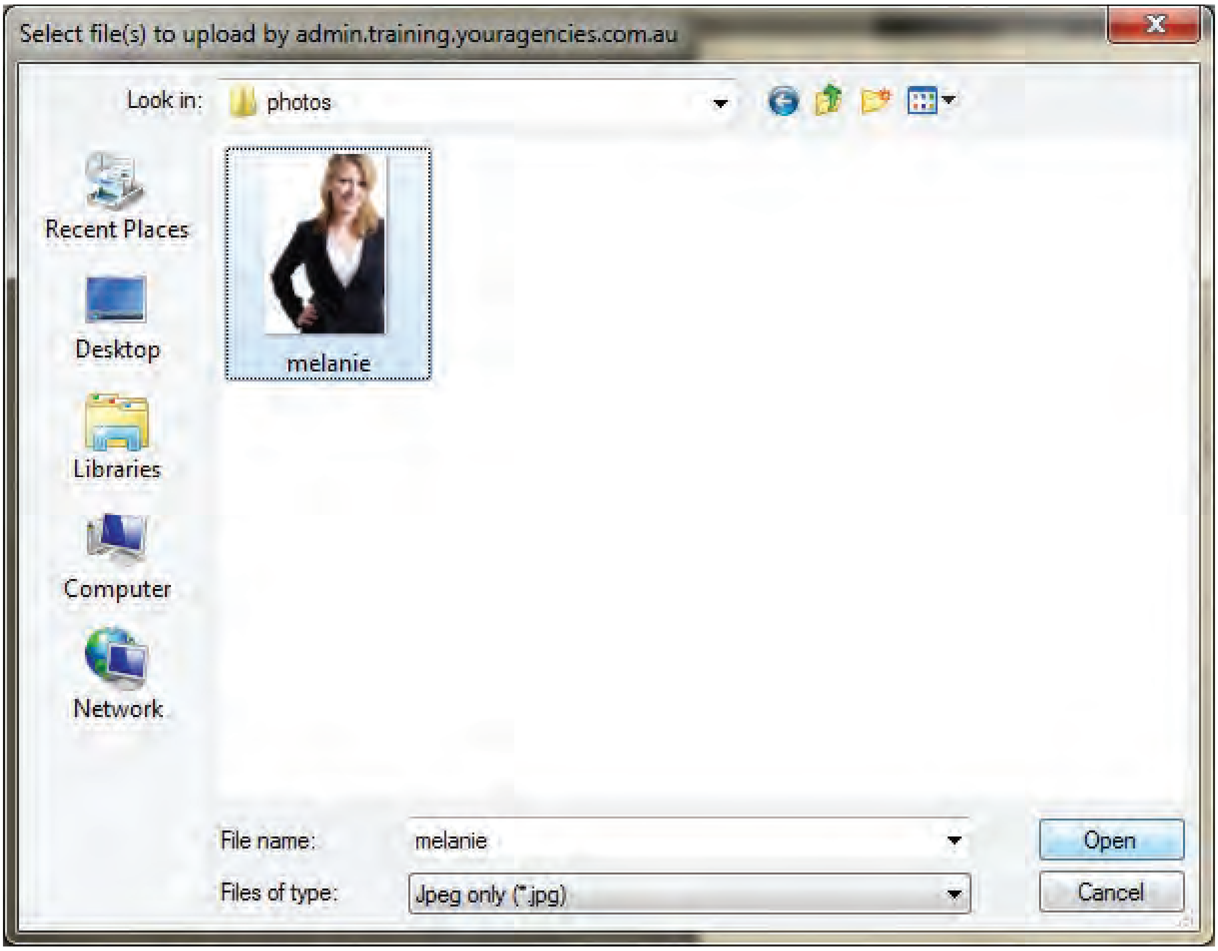
5. Upload staff photo
   o Click Upload



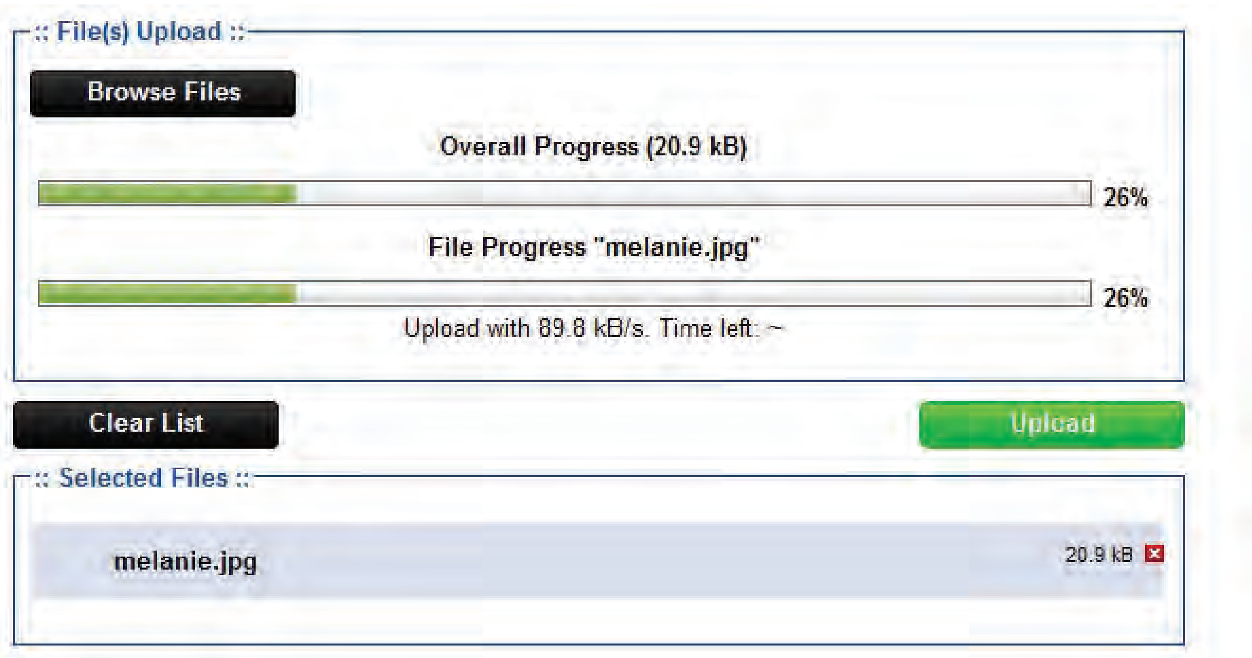
o Click Browse



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

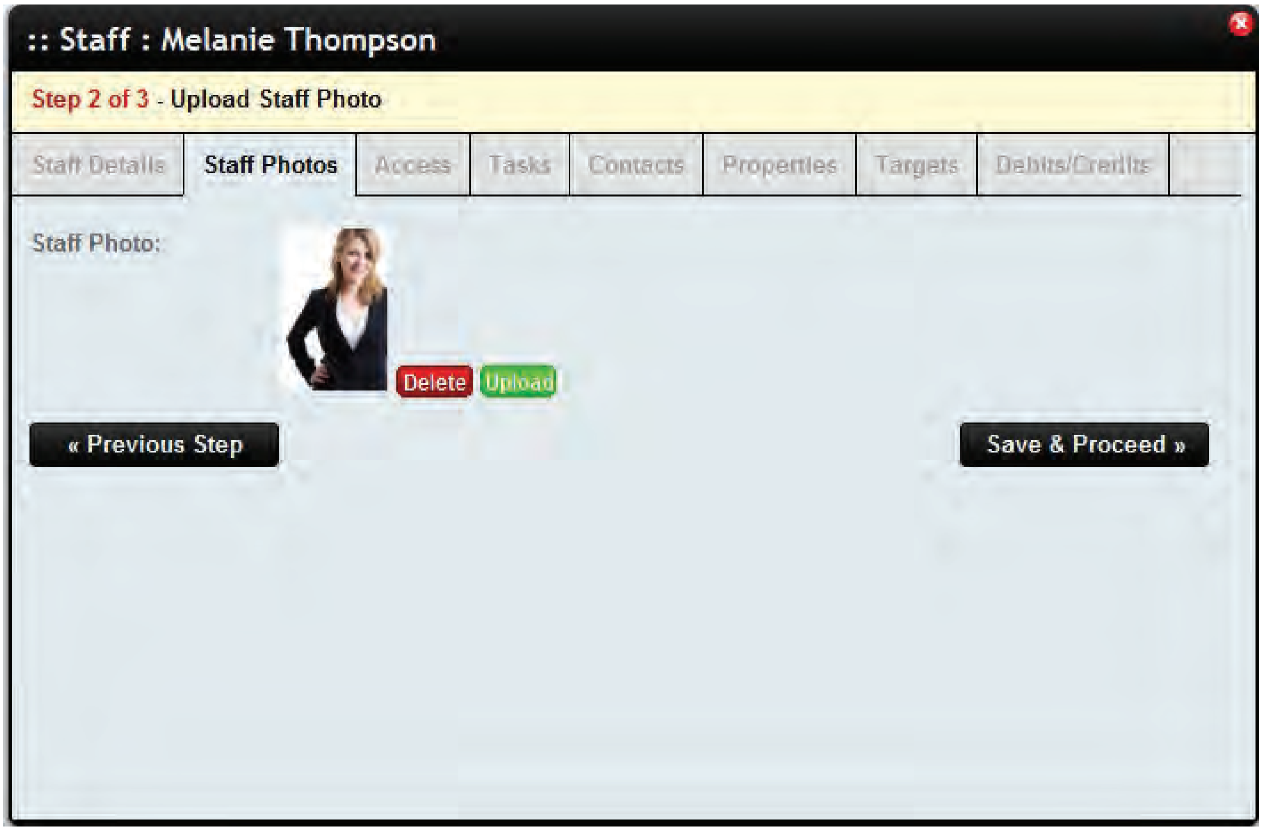


o Click Upload



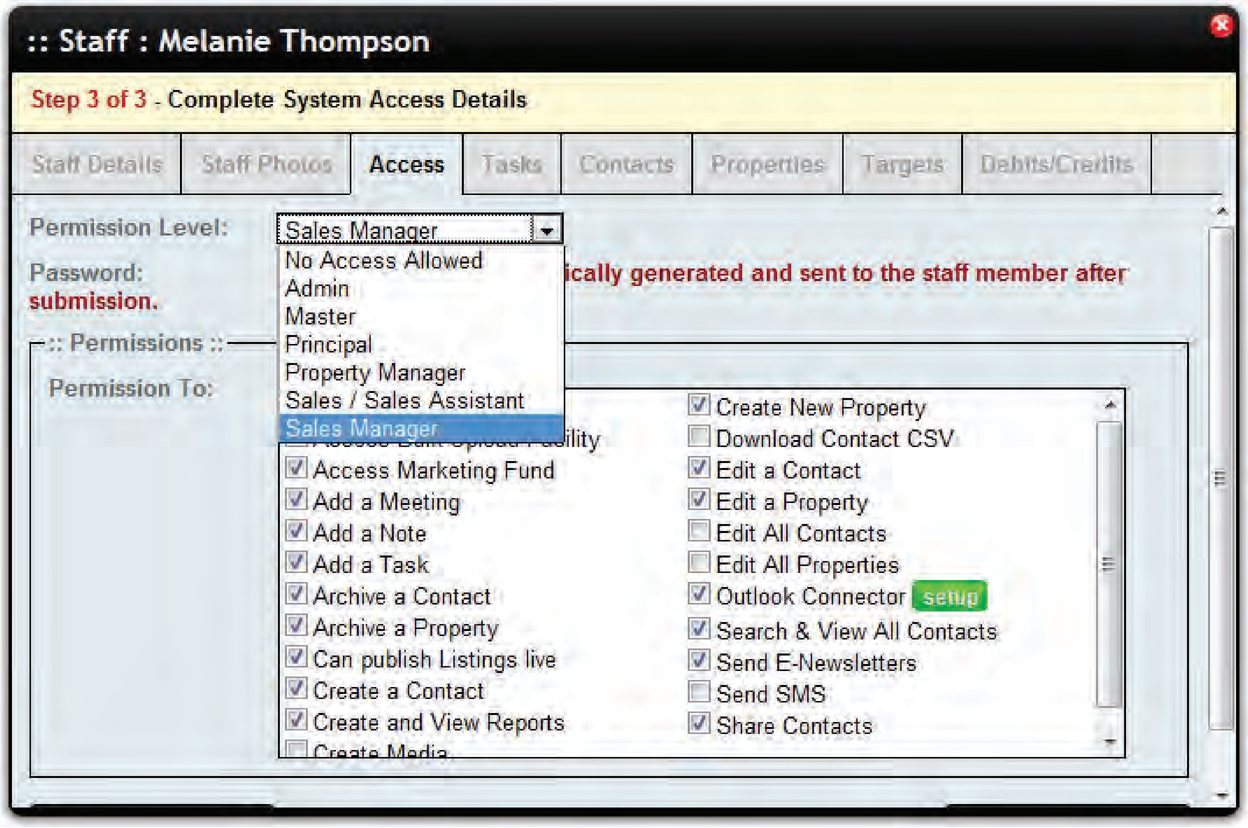
o Once the upload is complete, the upload panel will disappear and you will be directed back to the incomplete staff card displaying the selected photo.

6. Save and Proceed



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

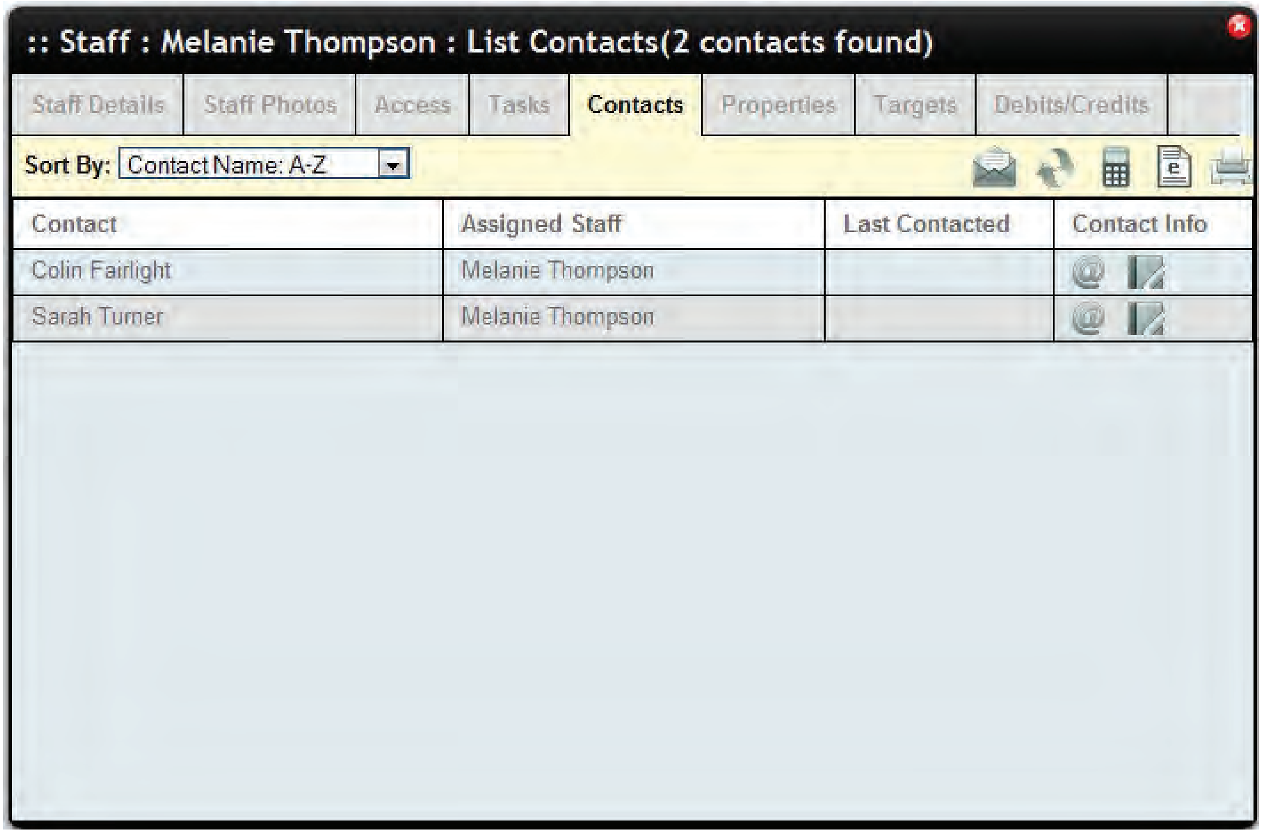
**Note: You can specify/adjust access permissions for individual staff by ticking the individual check boxes [Click here](#) to view the permissions overview*



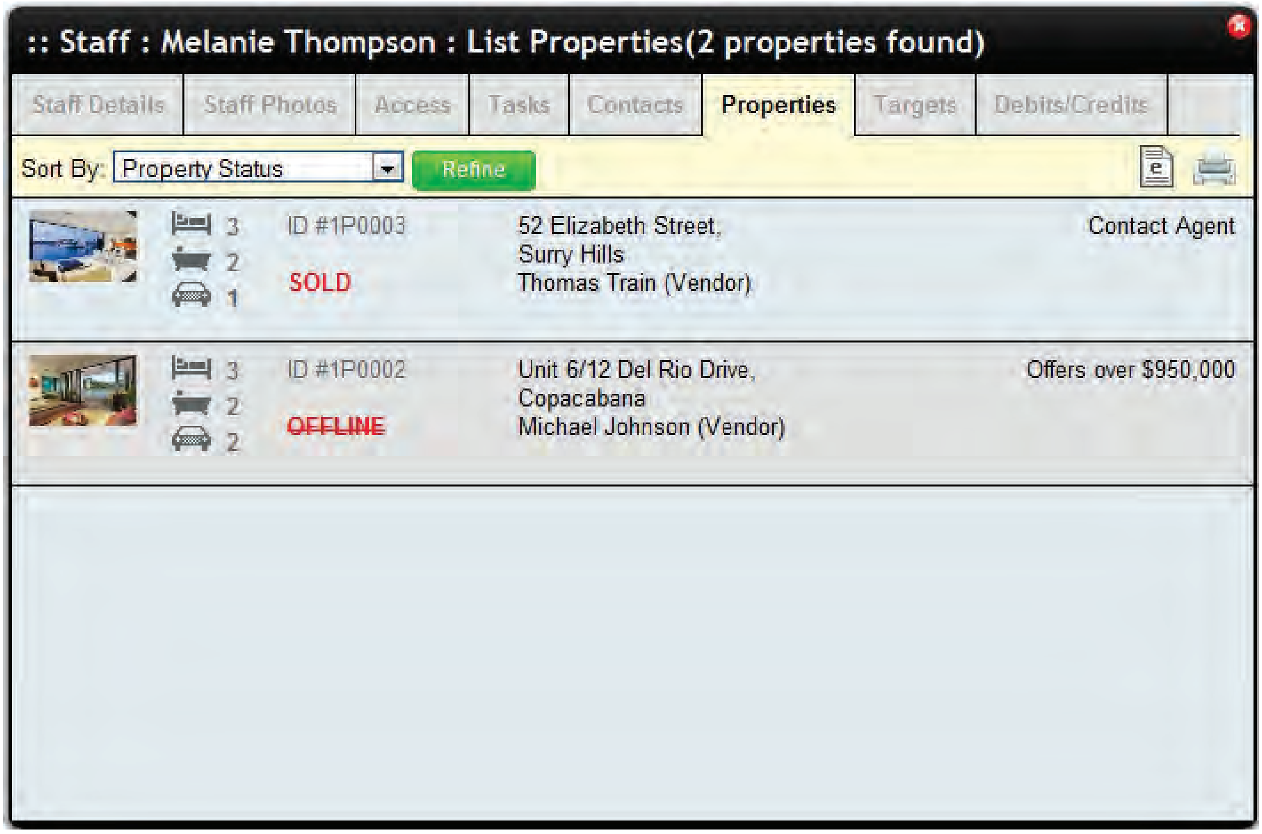
8. Once Access has been allocated click Finish to complete the Staff Member Profile.
**Note: an email is sent to the agent using the email specified on the Staff Details tab with their user name and password. To activate this password the user will need to follow the link in the email.*

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

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



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

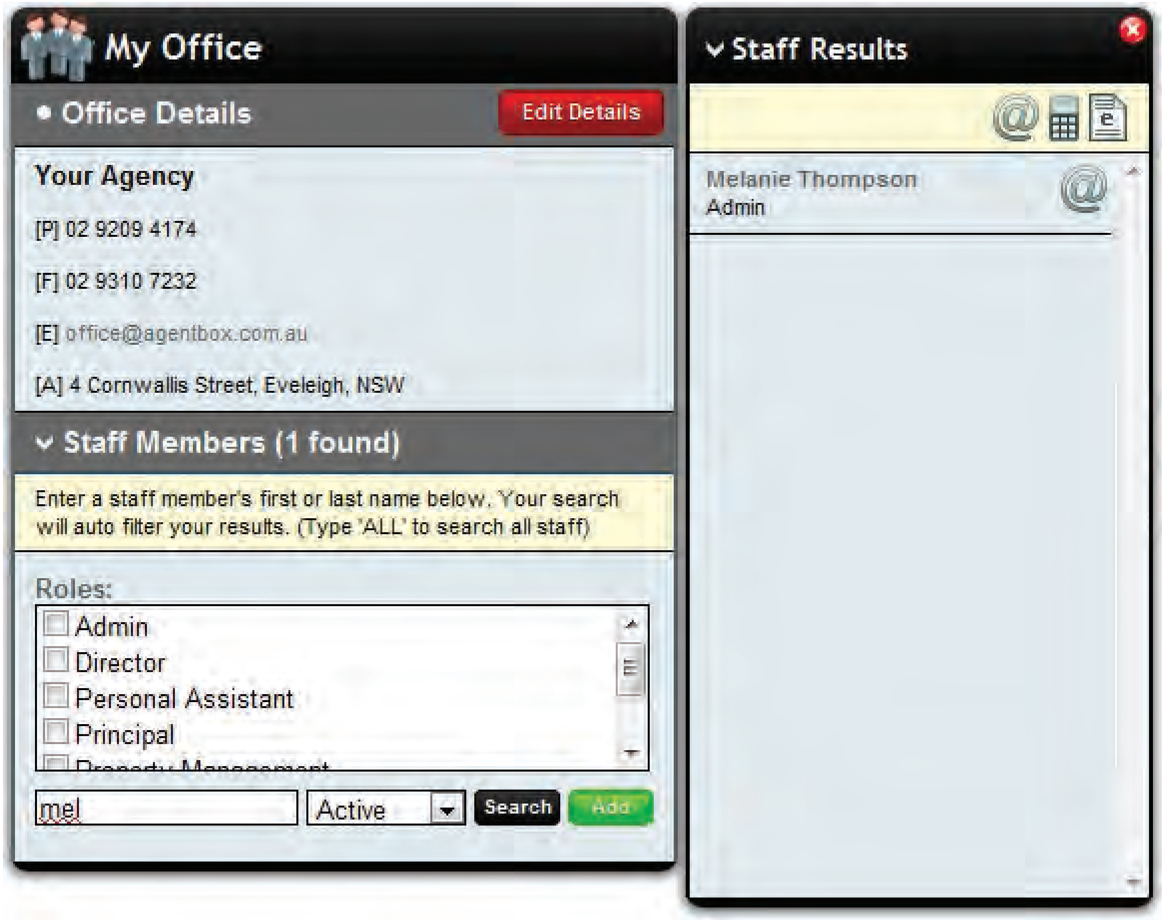


Staff Targets

How do I add/edit staff targets?

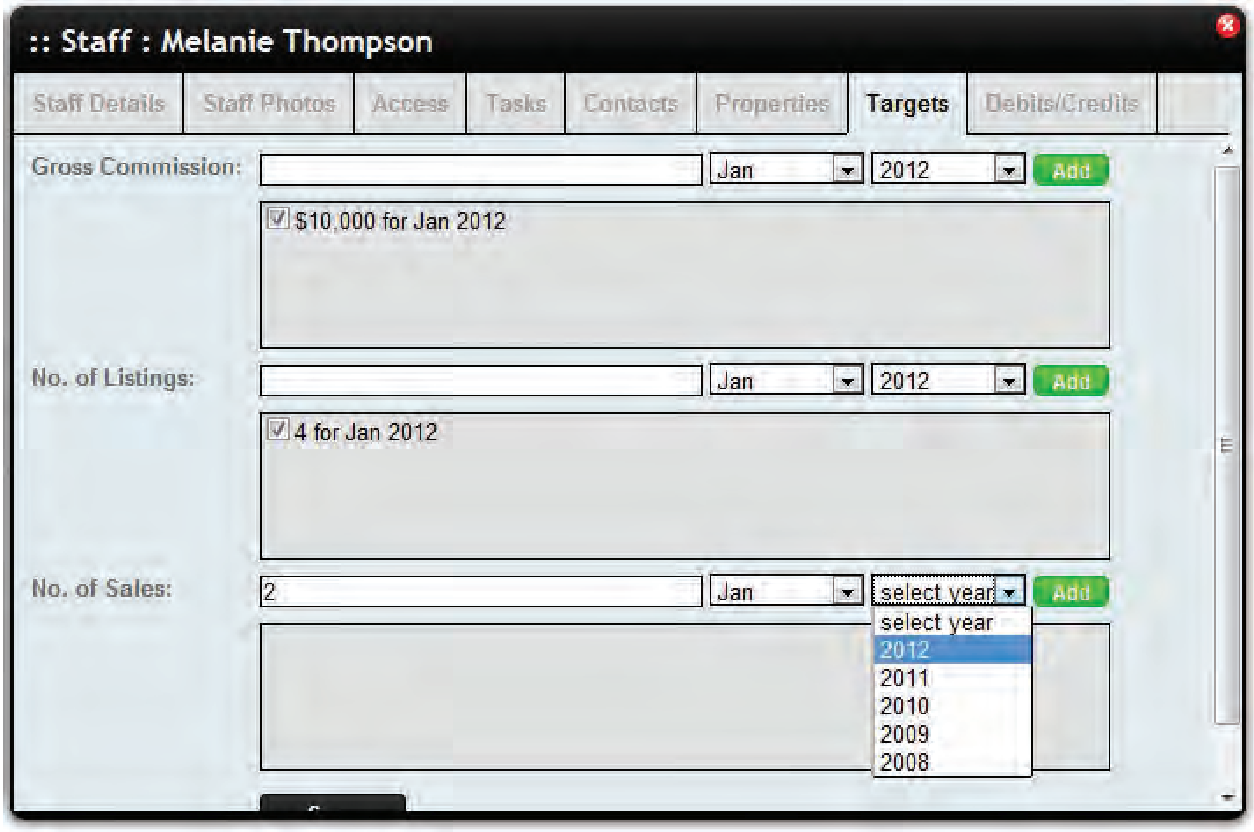
1. Click on My Office from the main menu.

2. Type the staff member's name on the Left Panel and the staff member will appear on the staff results panel.



3. Click on the staff members name to open their staff card

4. Go to the Targets tab and enter Gross Commission, No. of Listings and No. of sales targets for the month and hit save.
To delete a target - un-tick the check box and hit save

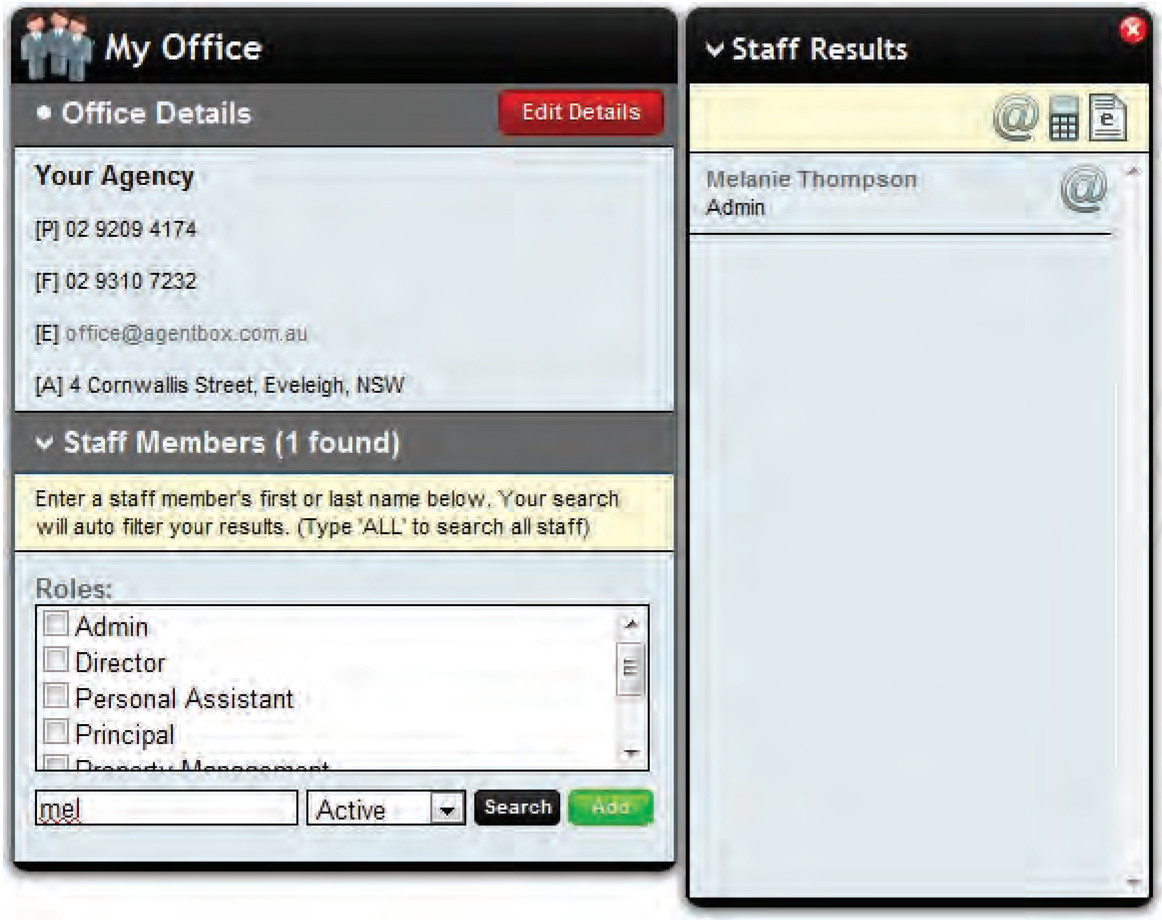


Staff Debit/Credits

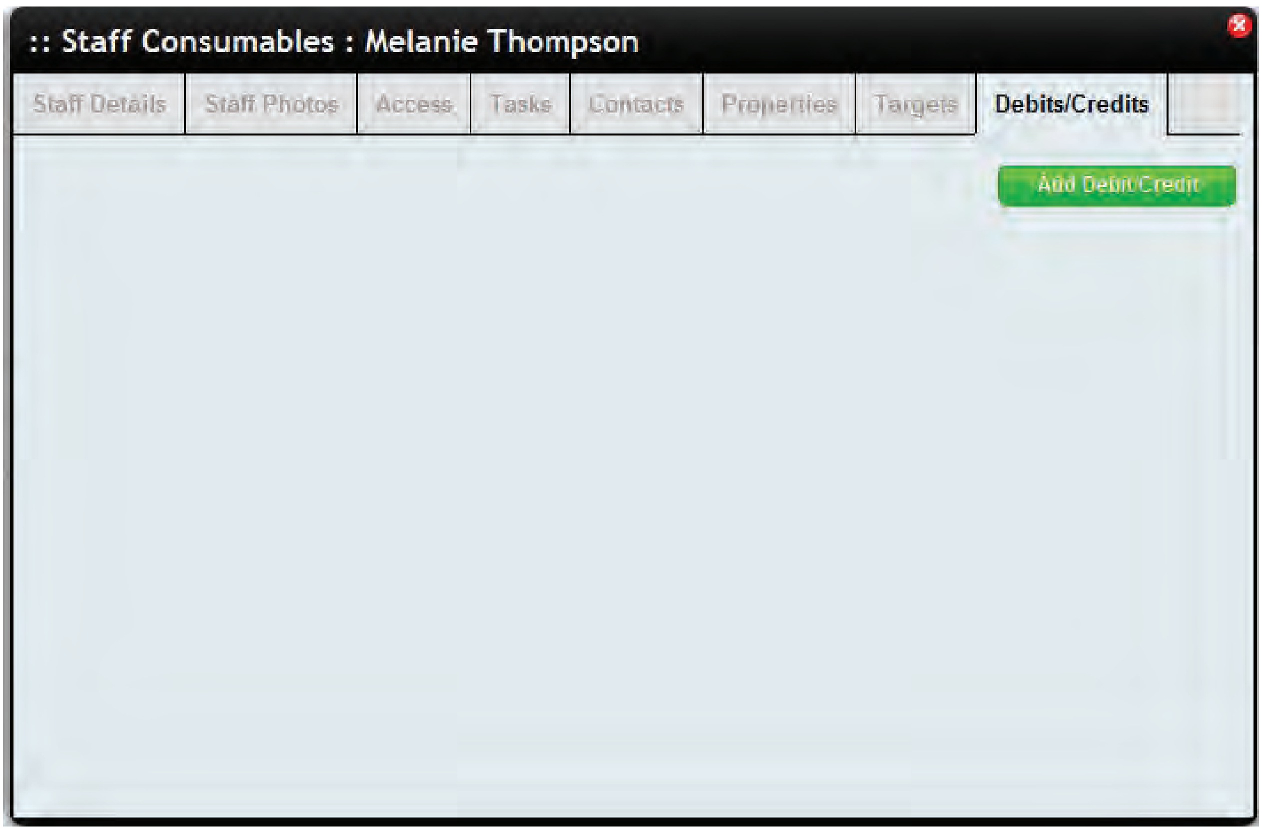
How do I apply debits and credits to a staff member?

1. Click on My Office from the main menu.

2. Type the staff member's name on the Left Panel and to staff member will appear on the staff results panel.

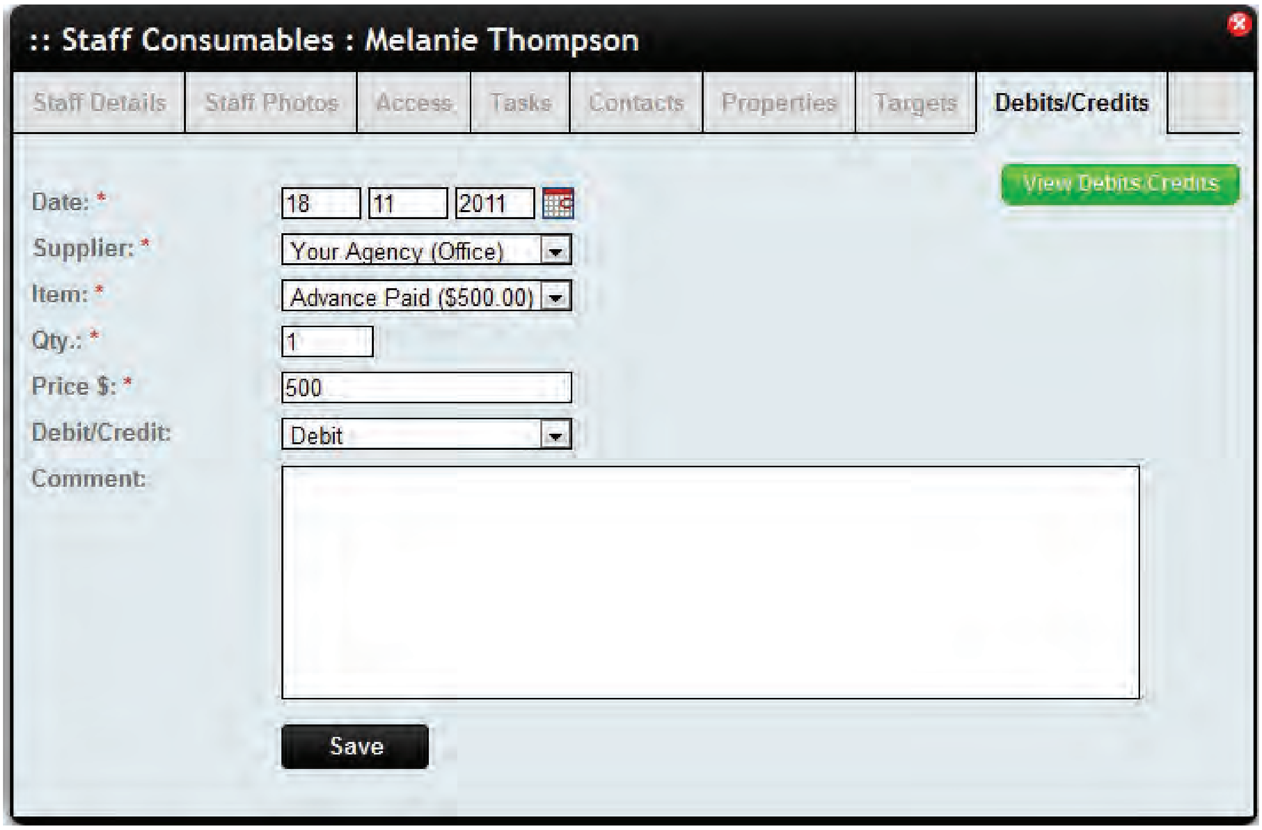


3. Click on the staff members name to open their staff card and click on the Debits/Credits tab

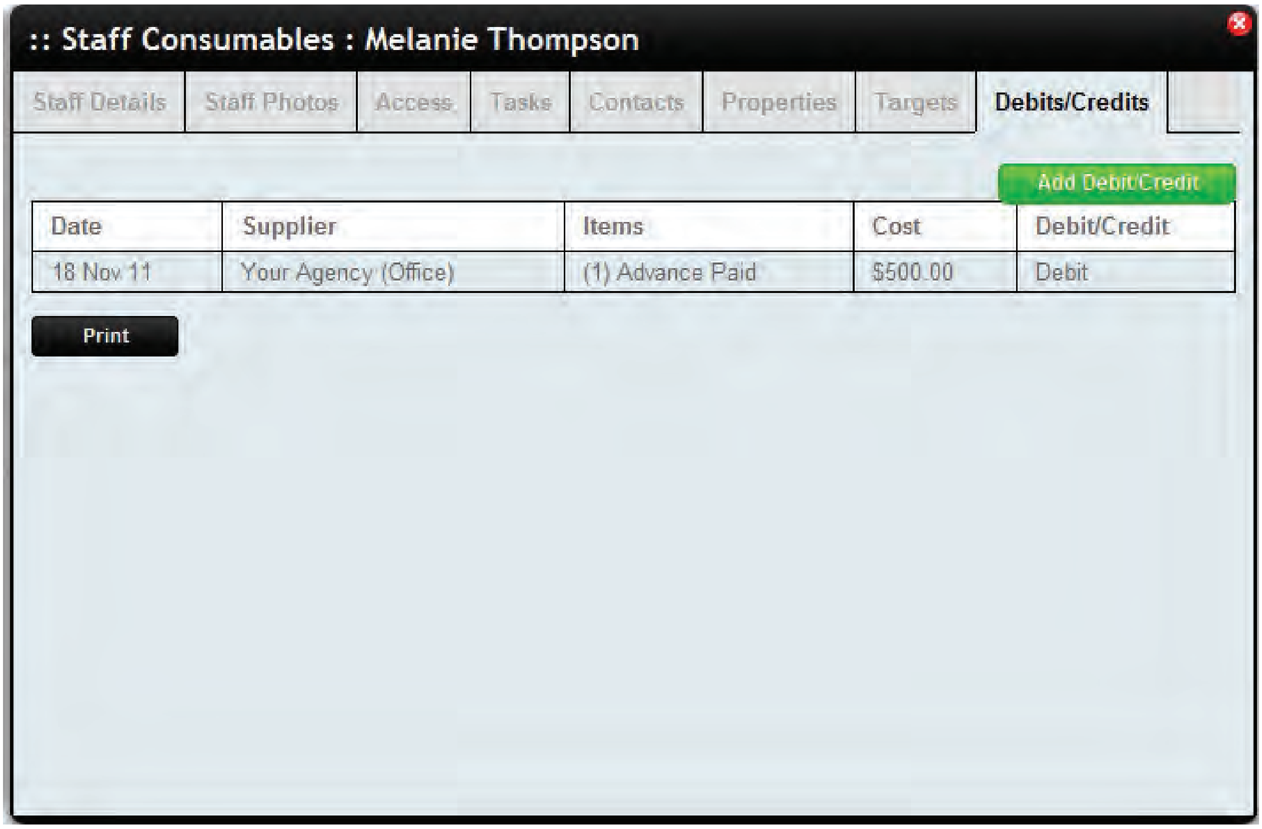


4. Click Add Debit/Credit

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



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.



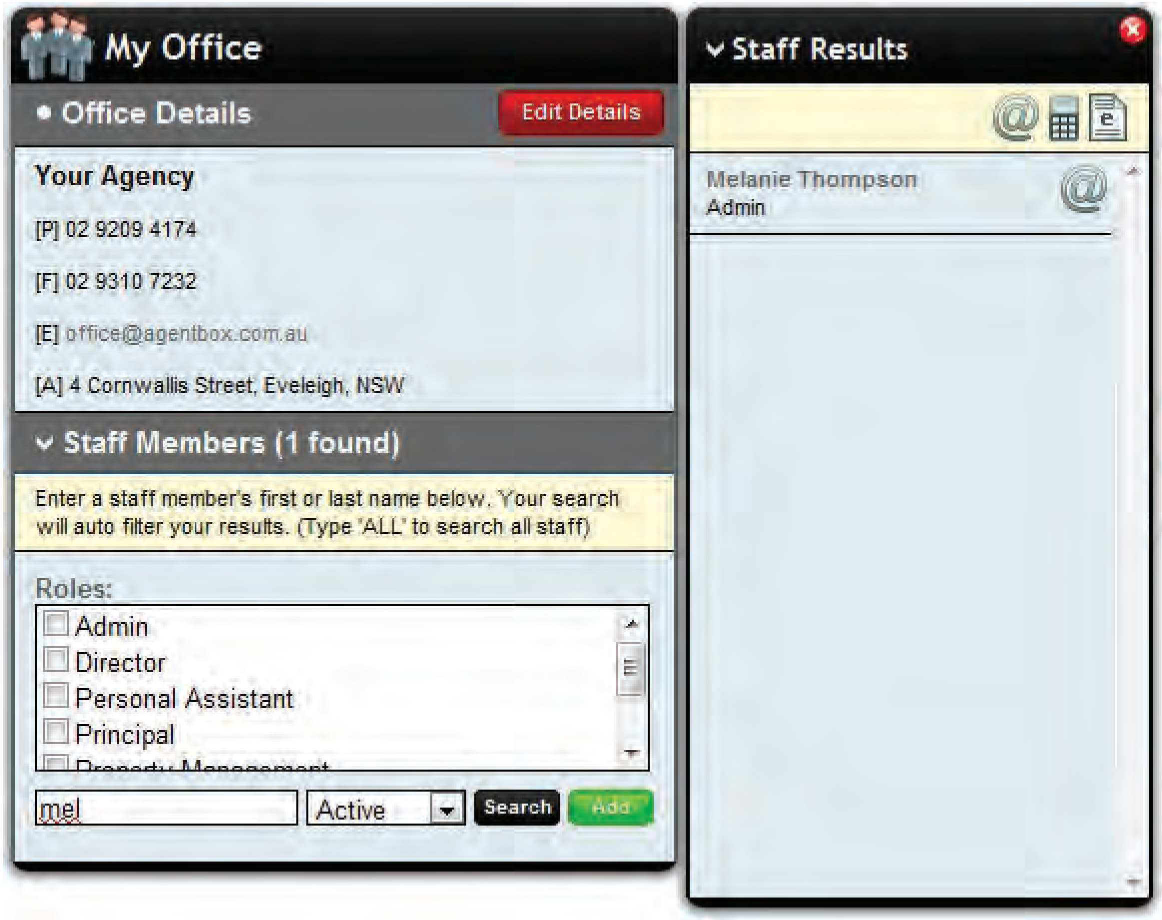
View/Delete Staff Tasks

How do I view/delete staff tasks?

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

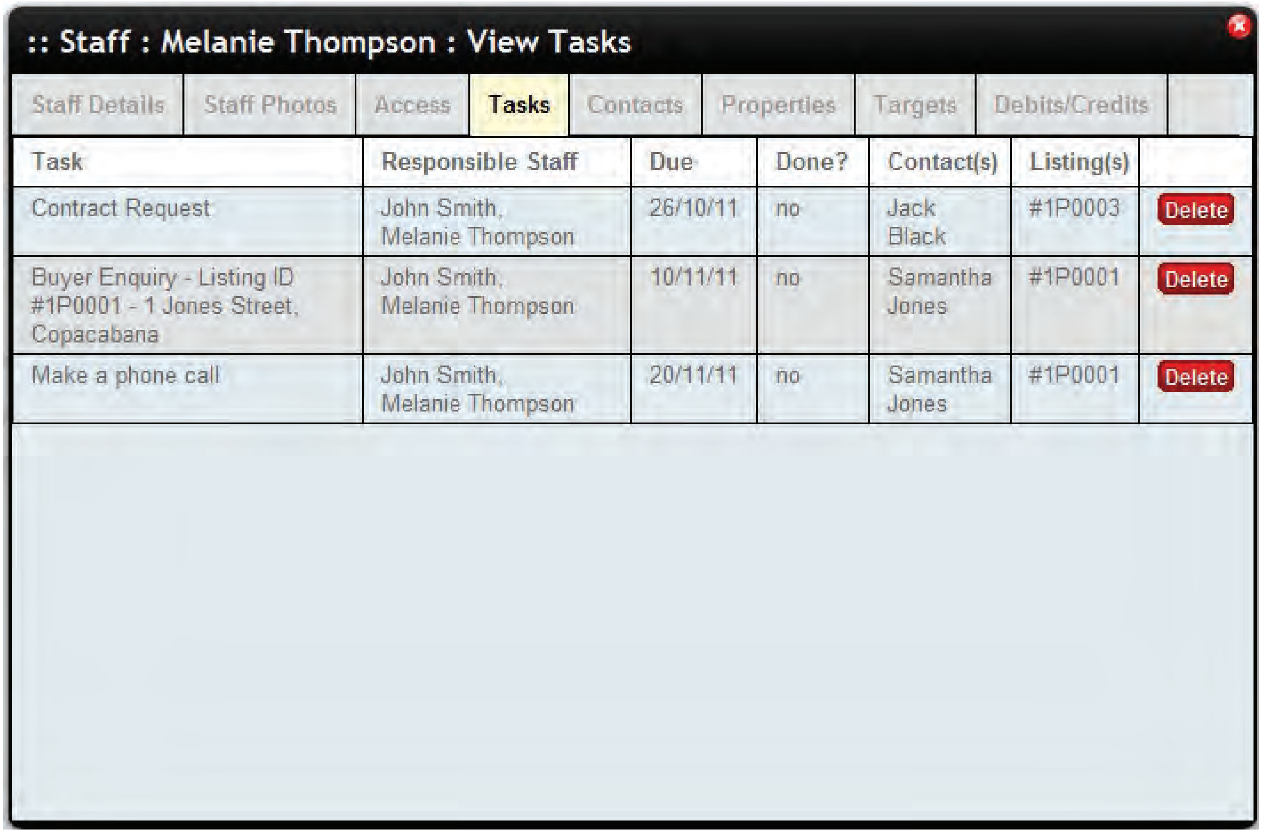
1. Click on My Office from the main menu.

2. Type the staff member's name on the Left Panel and to staff member will appear on the staff results panel.



3. Click on the staff members name to open their staff card

4. Click on the Tasks tab and click Delete to remove a task

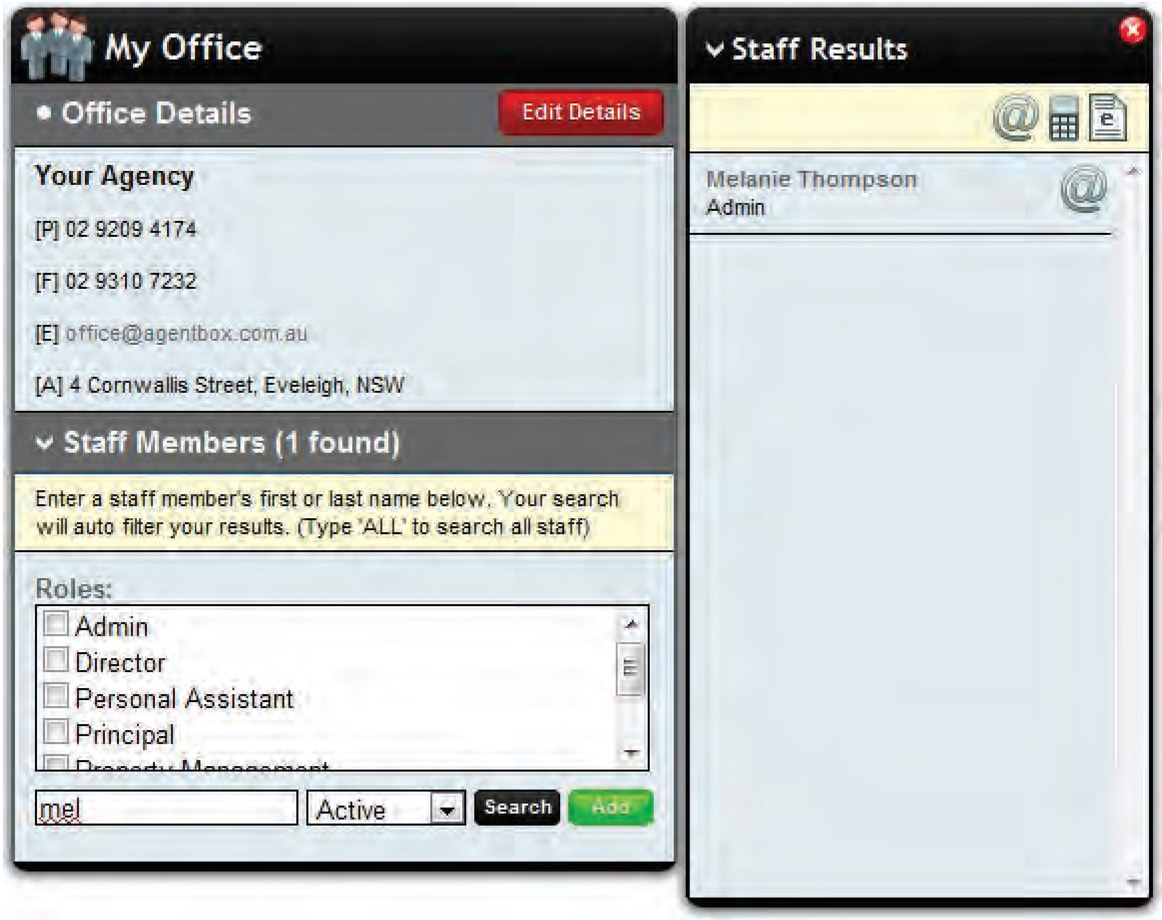


Delete/Archive Staff

How do I delete a staff member?

1. Click on My Office from the main menu.

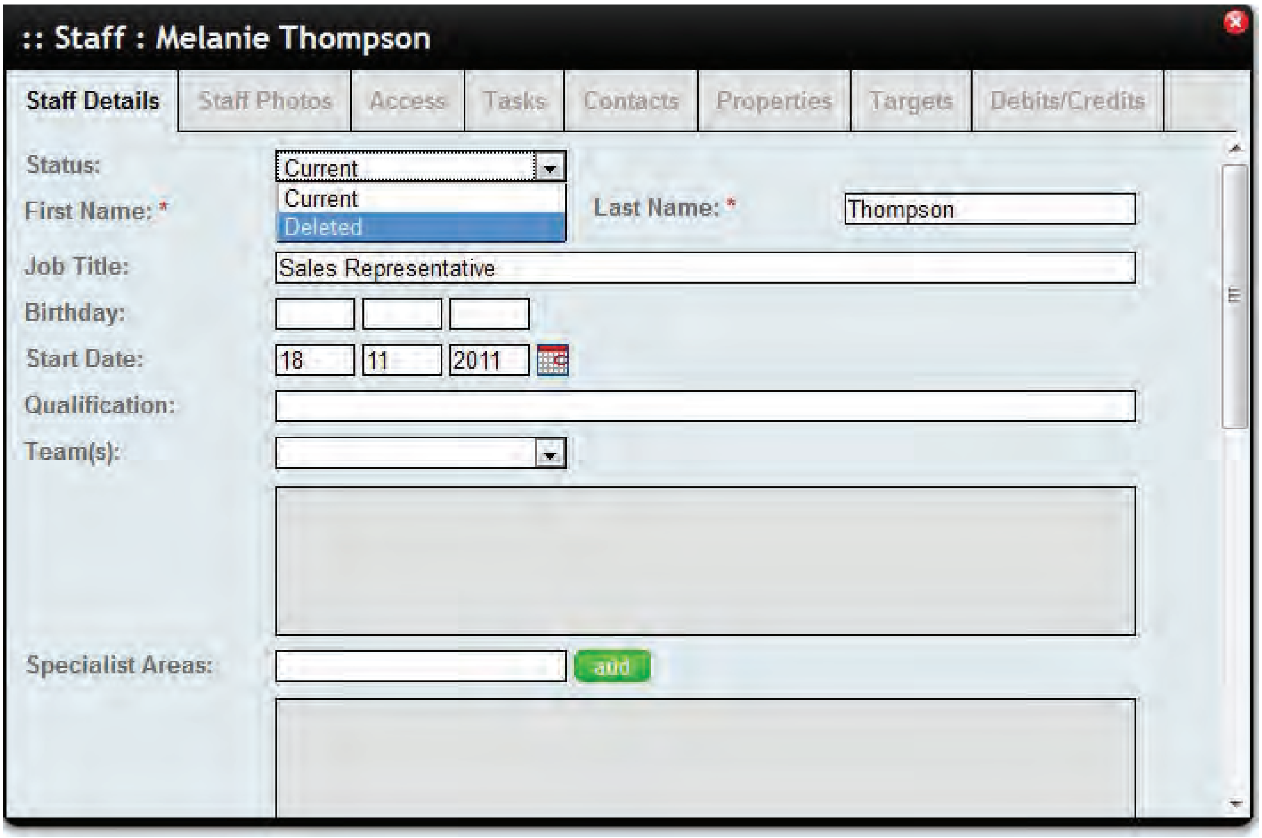
2. Type the staff member's name on the Left Panel and to staff member will appear on the staff results panel.



3. Click on the staff members name to open their staff card

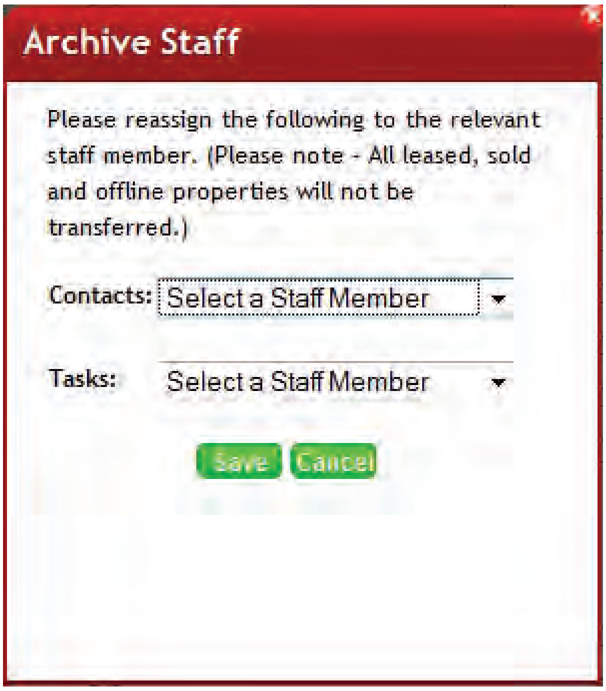
4. Select Deleted from the status drop down menu.

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



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

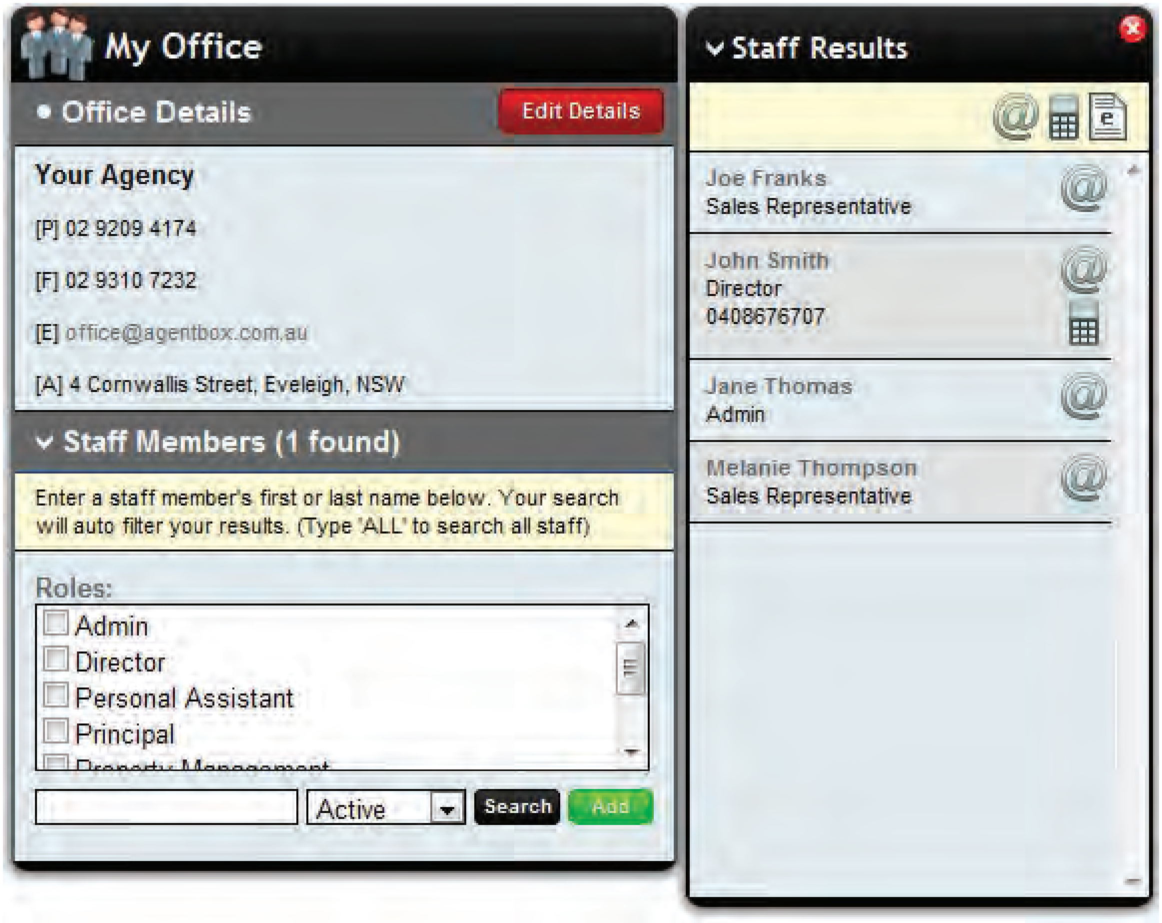


Communicate to Staff

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

1. Click on My Office from the main menu.

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



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

Properties

Properties

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

How do I add/edit a prospect property?
How do I convert a prospect property to an appraisal?
How do I add/edit an appraisal?
How do I convert an appraisal to a listing or mark as missed?
How do I add/edit a listing?
How do I change a property status?
How do I upload property photos, floorplans, documents and links?
How do I add inspection times to a listing?
How do I add a project?
How do I add properties to a project?
How do I search for a property?
How do I search for a project?
How do I search for an appraisal property?
How do I search for a prospect property?
How do I search for multiple properties?
How do I print a detailed property report?
How do I preview a property?
How do I send a preview of the property to the vendor?
How do I send an email to related property contacts?
How do I SMS related property contacts?
How do I send an e-newsletter via a property? - screen shot + link to how to create an e-newsletter video?
How do I log property enquiries?
How do I view all property enquiries?
How do I communicate to all enquiry contacts?
How do I match buyers to a property?
How do I log appointment buyer feedback?
How do I add a note to a property?
How do I view all notes against a property?
How do I add a meeting to a property?
How do I add a task or apply an activity schedule to a property?
How do I send a letter from a property?
How do I create sales advise?
How do I create brochures and window cards?
How do I view property web hits?
How do I view portal feed logs for a property?
How do I log marketing funds and expenses?
How do I view property history?
How do I add inspection feedback after an open home/inspection?
How do I communicate to viewers of a property?
How do I create a vendor report?
How do I log an offer?
How do I log a contract request?
How do I view property modifications?

[How do I conduct a Comparative Market Analysis (CMA)](#)
[How do I enter property commissions?](#)

The Property Card

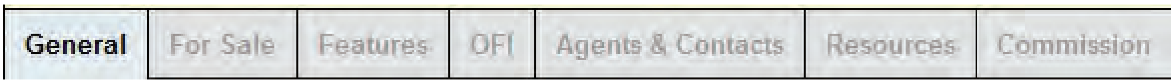
The Property Card

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

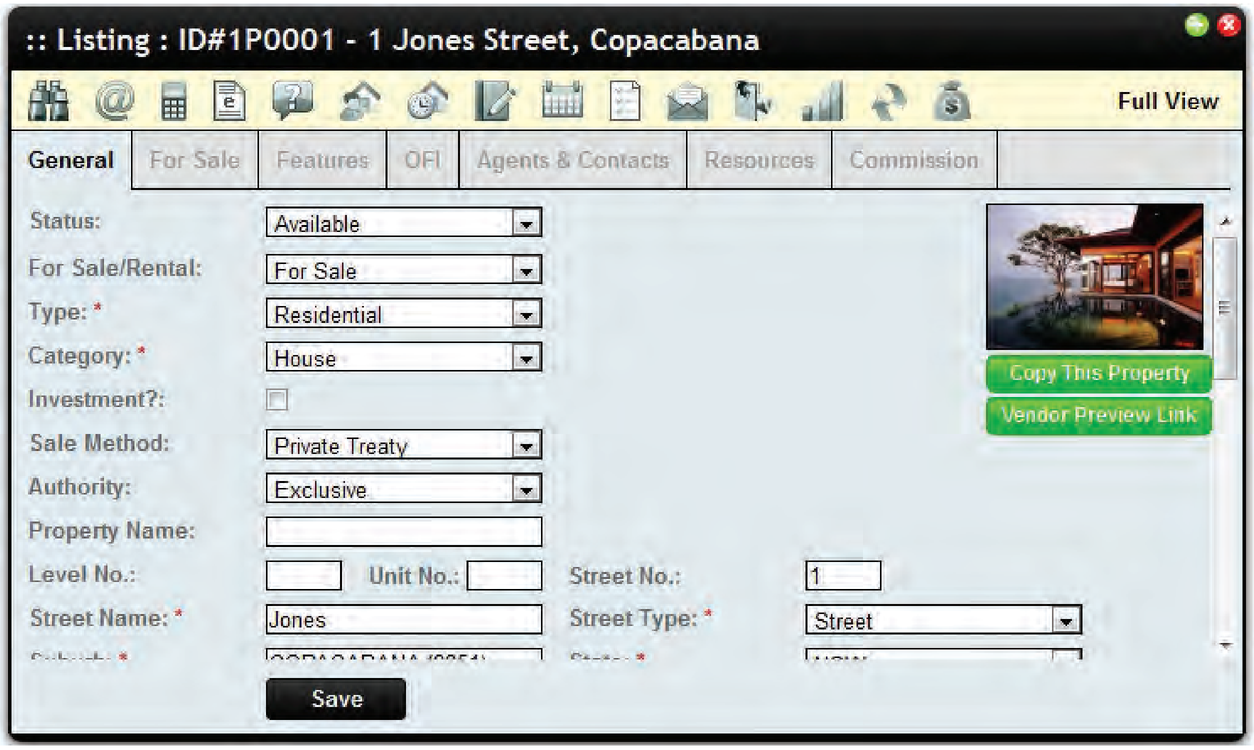
- Main Property Panel & Tabs
- Property Action Icons
- Left Panel Tabs

Property Panel Tabs

Main Property Panel & Tabs



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



Property Action Icons

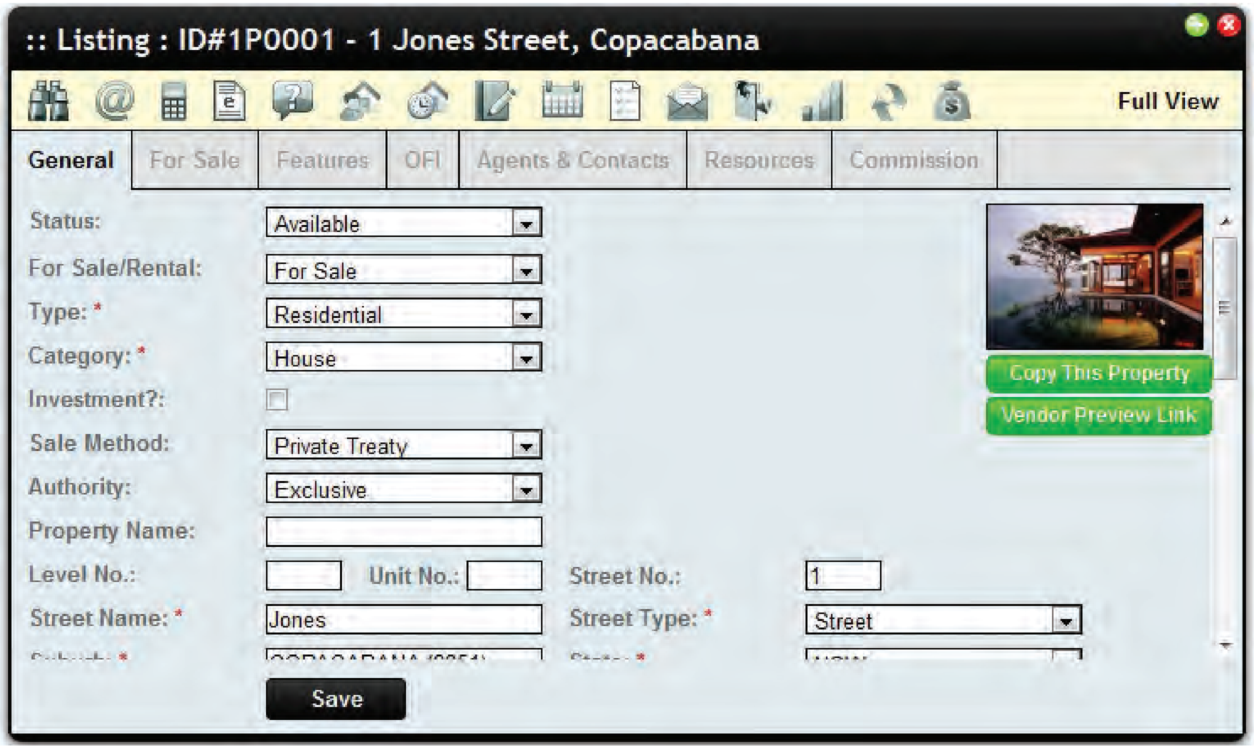
Property Action Icons

From Left to Right

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

res images.

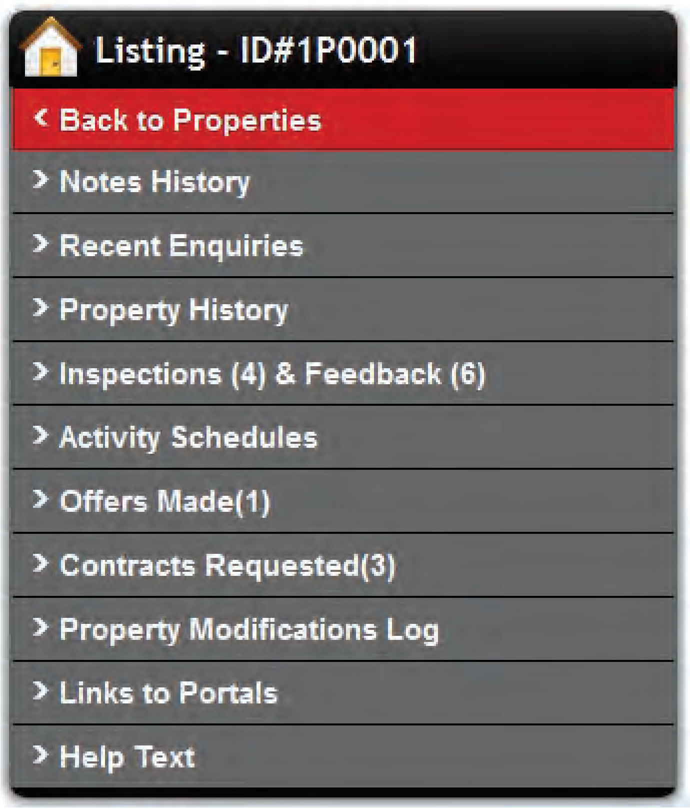
- ○ Property Hits - *View the property hits from your website for this property*
- ○ Portal Feed Logs - *You can view the portal feed receipts for supported portals, currently realestate.com.au and domain.com.au*
- ○ Marketing Funds - *Keep track of your approved funding and expenditure on the property.*



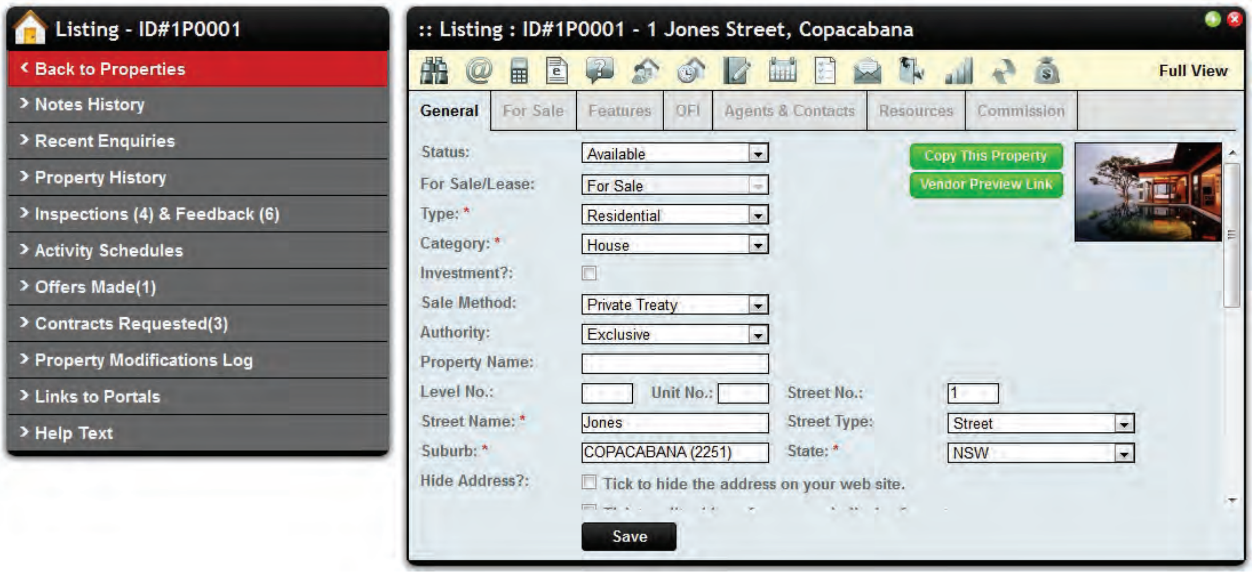
Left Panel

Left Property Panel Tabs

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



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



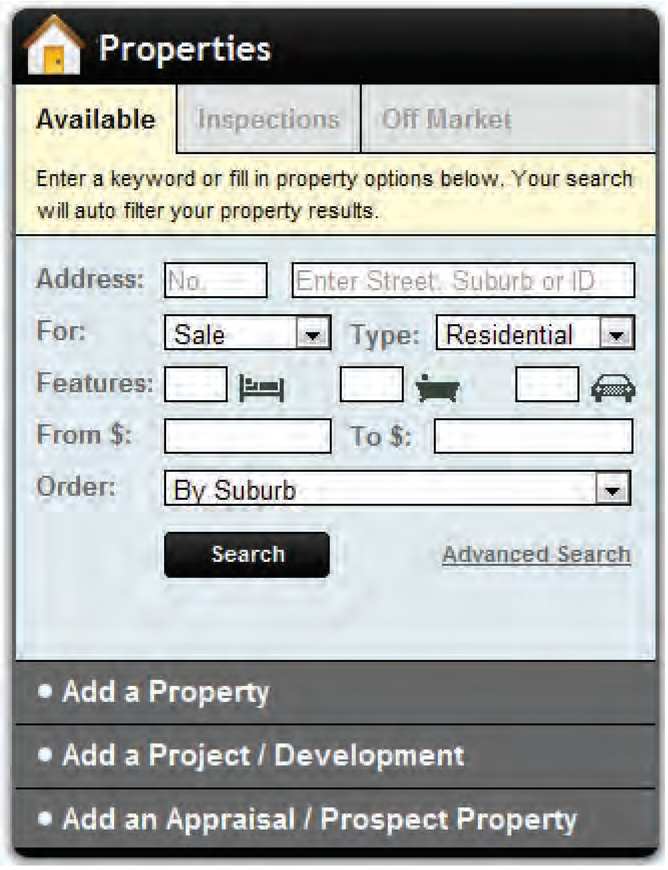
Add Prospect Property

How do I add a Prospect Property?

1. Go to Properties from the main menu.

2. Click on Add and Appraisal/Prospect property on the left property panel.

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



3. Select Add a Prospect Property

4. Complete the General Prospect Information.

Prospect Property ::

Status: - Defaults to prospect. You can then change this status by selecting convert to appraisal from the drop down menu.
For Sale/Rental: - Select from the drop down menu, the form fields will adjust accordingly, this will copy if converted to an appraisal.
Type: *- Form fields options will vary depending on if the property is for sale or a rental, this will copy if converted to an appraisal.
Category: * - Form fields options will vary depending on the type chosen, this will copy if converted to an appraisal.
Property Name: - This will copy if converted to an appraisal.
Level No. Unit No.: Street No.: - These will copy if converted to an appraisal.
Street Name: * - This will copy if converted to an appraisal.

Street Type: * - This will copy if converted to an appraisal.
Suburb: * - Start typing the Suburb then select from the drop down. This will copy if converted to an appraisal.
State: * - This will auto generate if Suburb is selected. This will copy if converted to an appraisal.
Address Format: - Tick to edit address for your web display format. - This will adjust the address display on your website only if converted to an appraisal then a listing.

:: Prospect Info ::

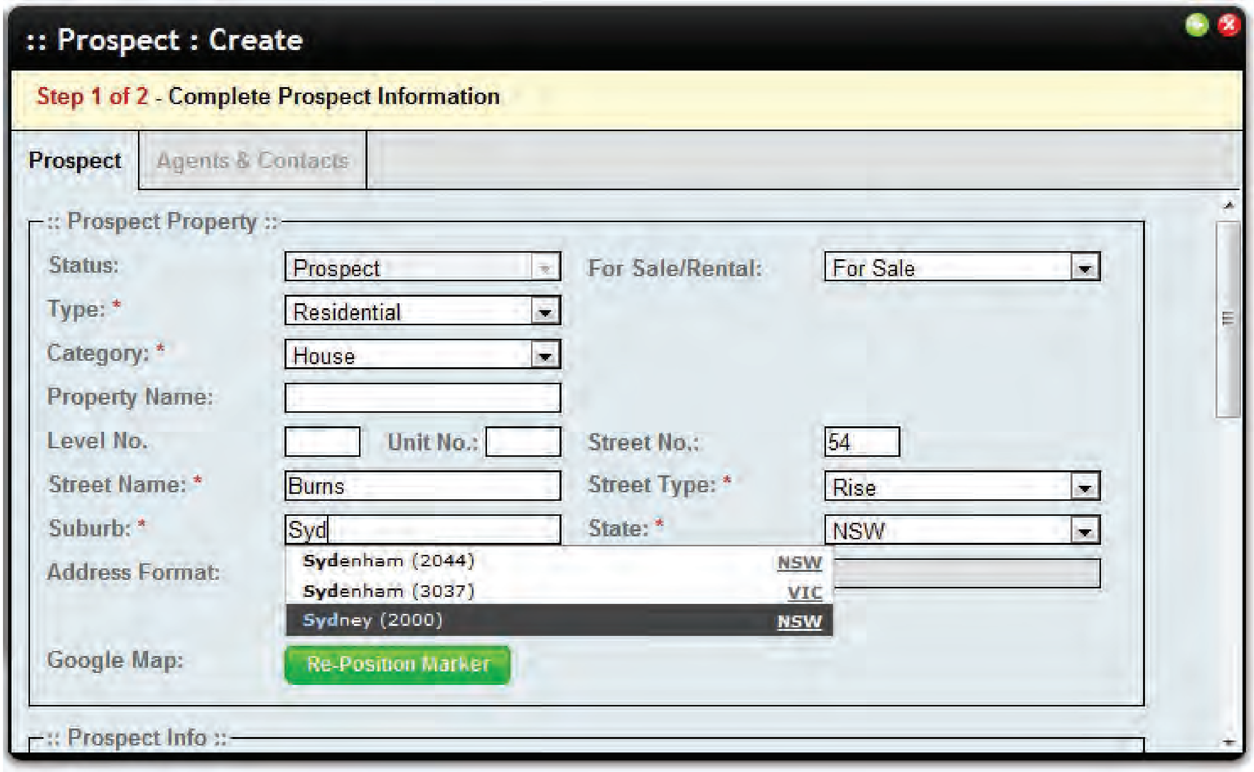
Last Sold Price($): Numeric Values only - This information will not carry across if converted to an appraisal.
Prospecting Price($): Numeric Values only - This price will be converted to the Appraisal Price, if converted to an appraisal.
Last Sold Date: [Select Date] This information will not carry across if converted to an appraisal.

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

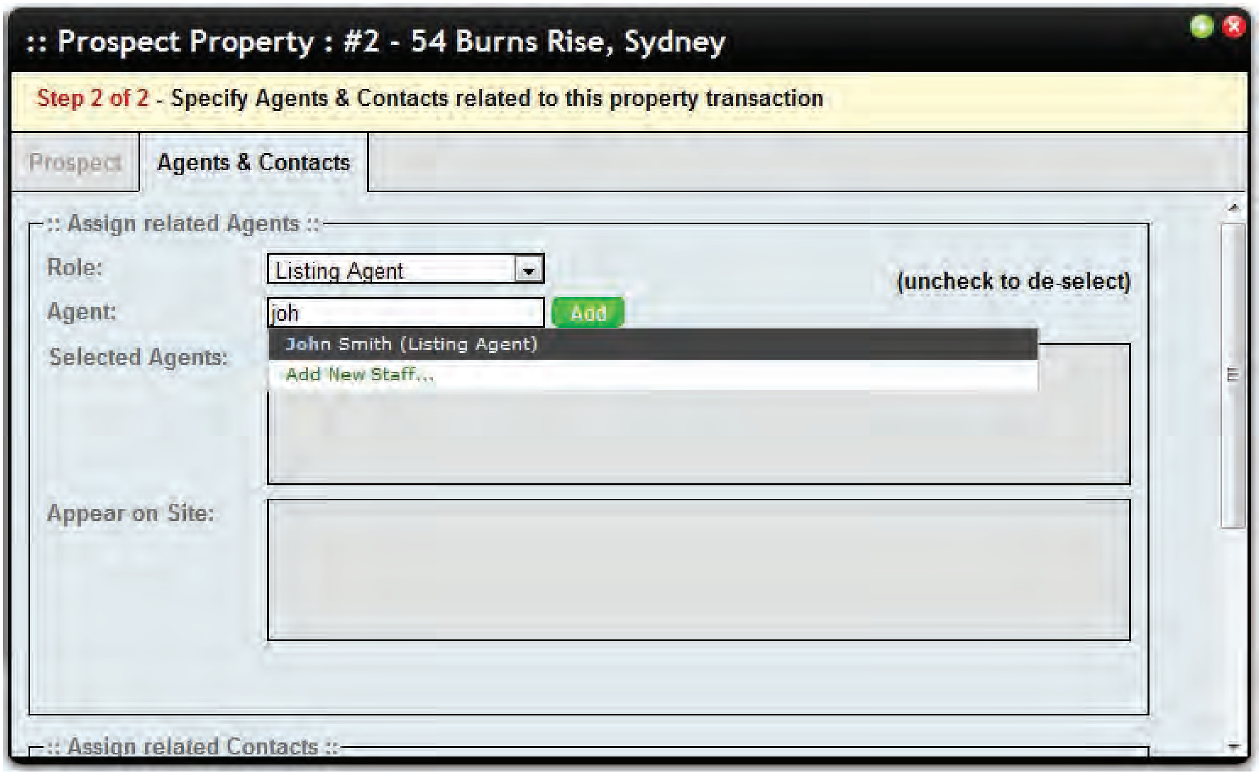
Bedrooms: - Single Numeric Values only no decimals e.g 1.5
Garages: - Single Numeric Values only no decimals e.g 1.5
Car Spaces: - Single Numeric Values only no decimals e.g 1.5
Bathrooms: - Single Numeric Values only no decimals e.g 1.5
Carports: - Single Numeric Values only no decimals e.g 1.5
Golf Buggy Spaces: - Single Numeric Values only no decimals e.g 1.5
Land Size: Area (sqm) - Numeric Values only
External Area: Area (sqm) - Numeric Values only
Home Size: Area (sqm) - Numeric Values only
Frontage: Metres (m) - Numeric Values only
Construction: e.g. Brick
Aspect: - Select from drop down
Features: - Check all that apply

Tenanted?: * Check if this is a Tenanted Property

:: Tenanted Property :: **All information will be copied across if converted to an appraisal.*
Type of Tenant: - Holiday, Long Term, Monthly...etc
Current Rent:- Numeric Values only
Lease Term: - Free text field
Option Period:- Free text field
Lease Start Date: - [Select Date]
Lease End Date: - [Select Date]
Return %: - Numeric Values only
Annual Rent $: - Numeric Values only



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



6. Click Finish

7. You can now match contacts and add a note using the action icons or view the notes history and

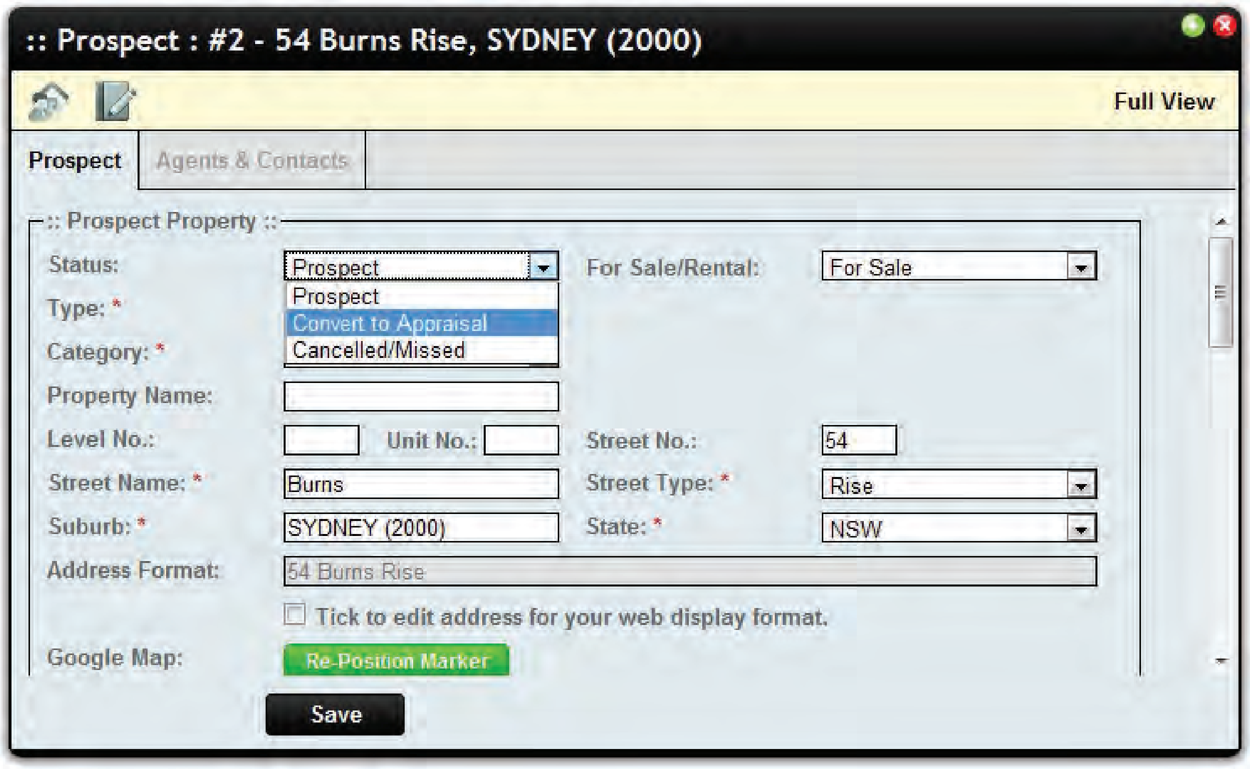
conduct a CMA from the left panel.

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.



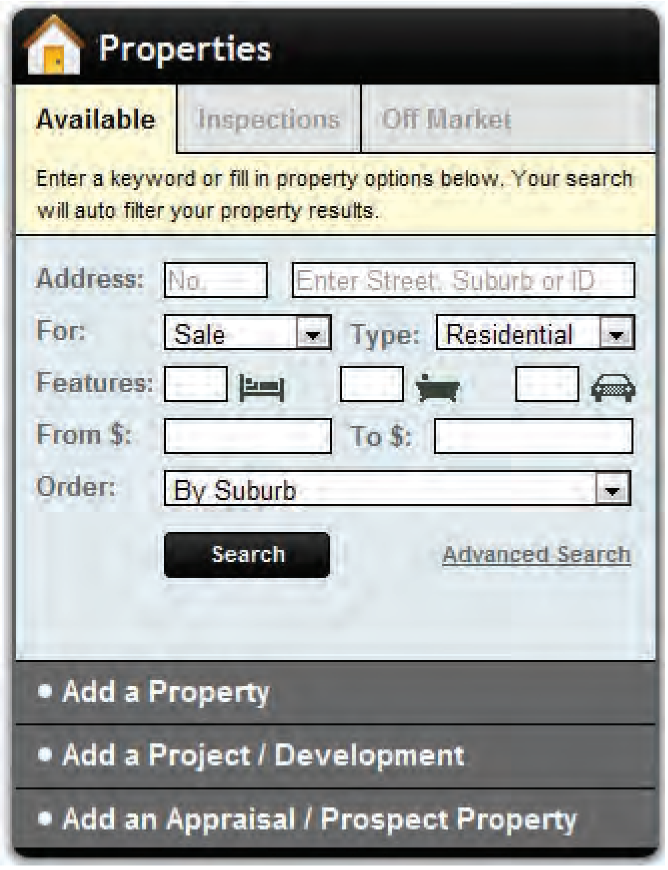
3. Click Save, and the property card will reload as an appraisal.

Add Appraisal Property

How do I add a Market Appraisal?

1. Go to Properties from the main menu.

2. Click on Add and Appraisal/Prospect property on the left property panel.
** Note: if you are unable to see this button please contact a Master user in your office and get them to check your permissions.*



3. Select Add a Market Appraisal

4. Complete the General Appraisal Information.

Property to Appraise ::

Status: Defaults to Appraisal. You can then change this status by selecting either listing presentation, convert to listing, or cancelled/missed from the drop down menu.
For Sale/Rental: - Select from the drop down menu, the form fields will adjust accordingly, this will copy if converted to a listing.
Type: *- Form fields options will vary depending on the status chosen, this will copy if converted to a listing.
Category: * - Form fields options will vary depending on the status chosen, this will copy if converted to a listing.
Property Name: - This will copy if converted to a listing.
Level No. Unit No.: Street No.: - These will copy if converted to a listing.
Street Name: * - This will copy if converted to a listing.

Street Type: * - This will copy if converted to a listing.
Suburb: * - Start typing the Suburb then select from the dropdown. This will copy if converted to a listing.
State: * - This will auto generate if Suburb is selected. This will copy if converted to a listing.
Address Format: - Tick to edit address for your web display format. - This will adjust the address display on your website only if converted to a listing.

:: Appraisal Info ::

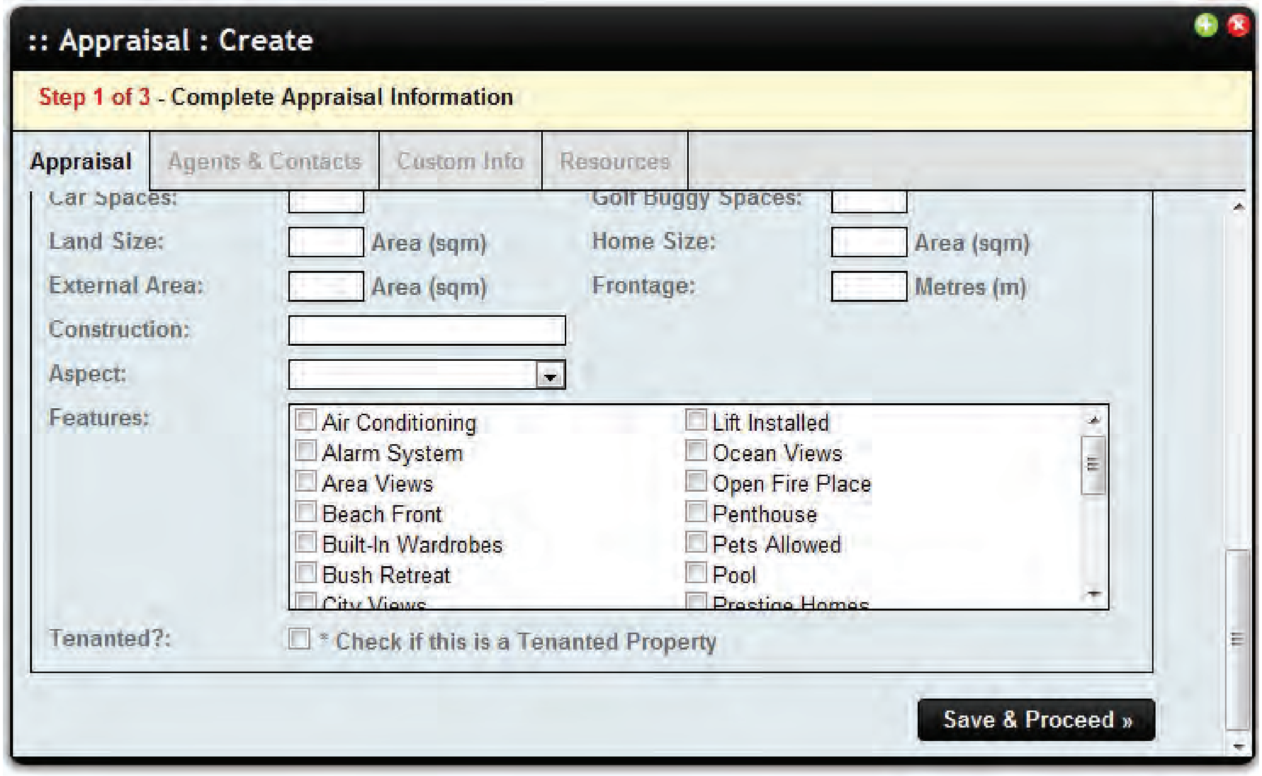
Price From($): - Numeric value only, field can be used as variables in letter templates.
Price To($): - Numeric value only, field can be used as variables in letter templates.
Appraisal Price($): * - Compulsory field for reporting purposes. Numeric Values only.
Appraisal Date: [Select Date] - Field can be used as variables in letter templates.
Appraisal Time: - Numeric value only, field can be used as variables in letter templates.
Appraisal Source: - Internal reference and/or reporting Select from drop down, field can be used as variables in letter templates
Appraisal For: - Internal reference and/or reporting Select from drop down, field can be used as variables in letter templates
Property Condition: - Internal reference and/or reporting Select from drop down, field can be used as variables in letter templates
Sale Method: - This will copy if converted to a listing, field can be used as variables in letter templates
Reason for Appraisal: Internal reference and/or reporting Select from drop down

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

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

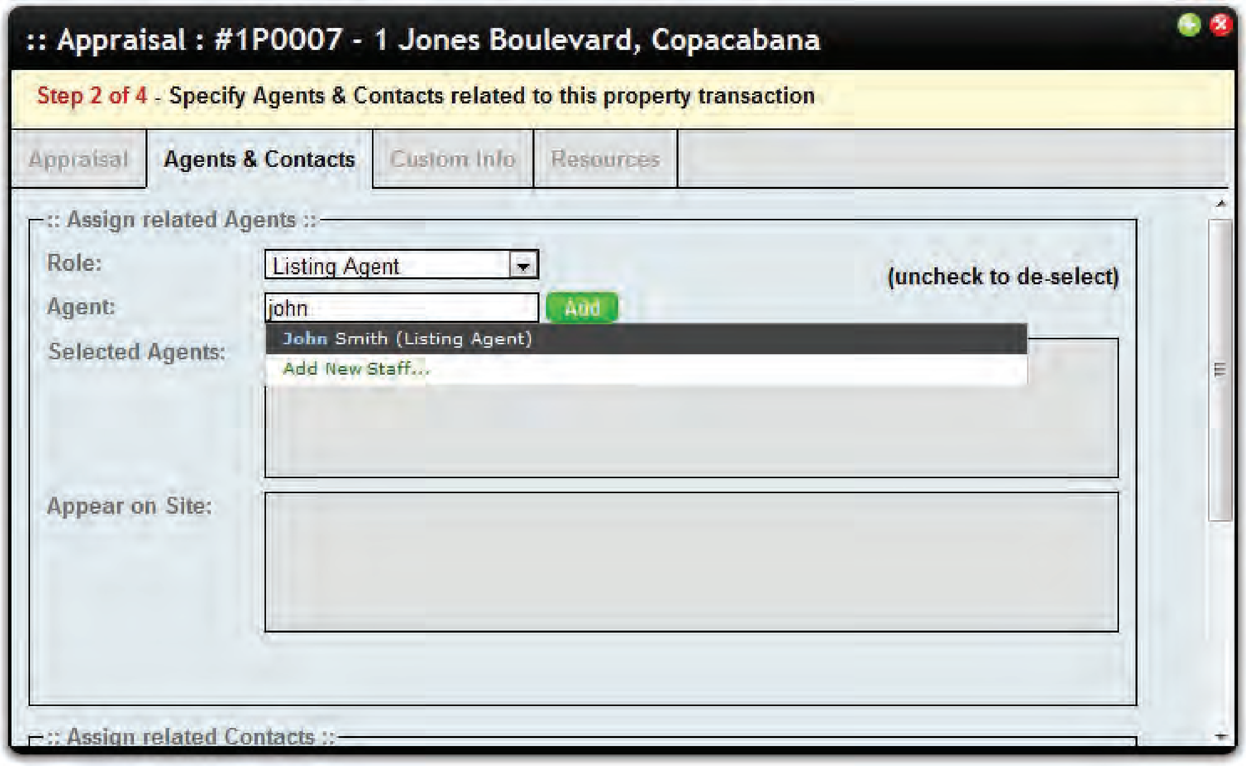
:: Tenanted Property :: **All information will be copied across if converted to a listing.*
Type of Tenant: - Holiday, Long Term, Monthly...etc
Current Rent:- Numeric Values only
Lease Term: - Free text field
Option Period:- Free text field
Lease Start Date: - [Select Date]
Lease End Date: - [Select Date]
Return %: - Numeric Values only
Annual Rent $: - Numeric Values only



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

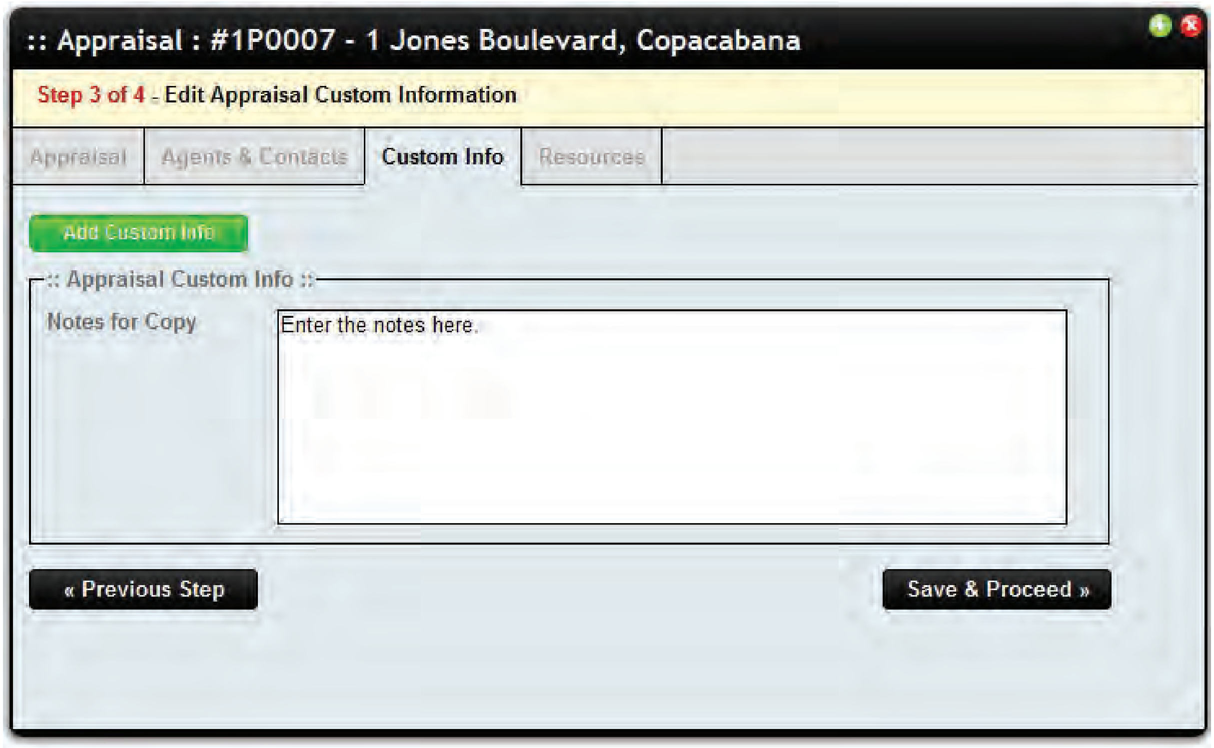
- Select role from drop down
- Type Agent name and select from results.
- Click Add, to insert as selected agent.
- To hide an agent from the website, Un-tick the check box next to their name in the Appear on Site box and hit save.

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

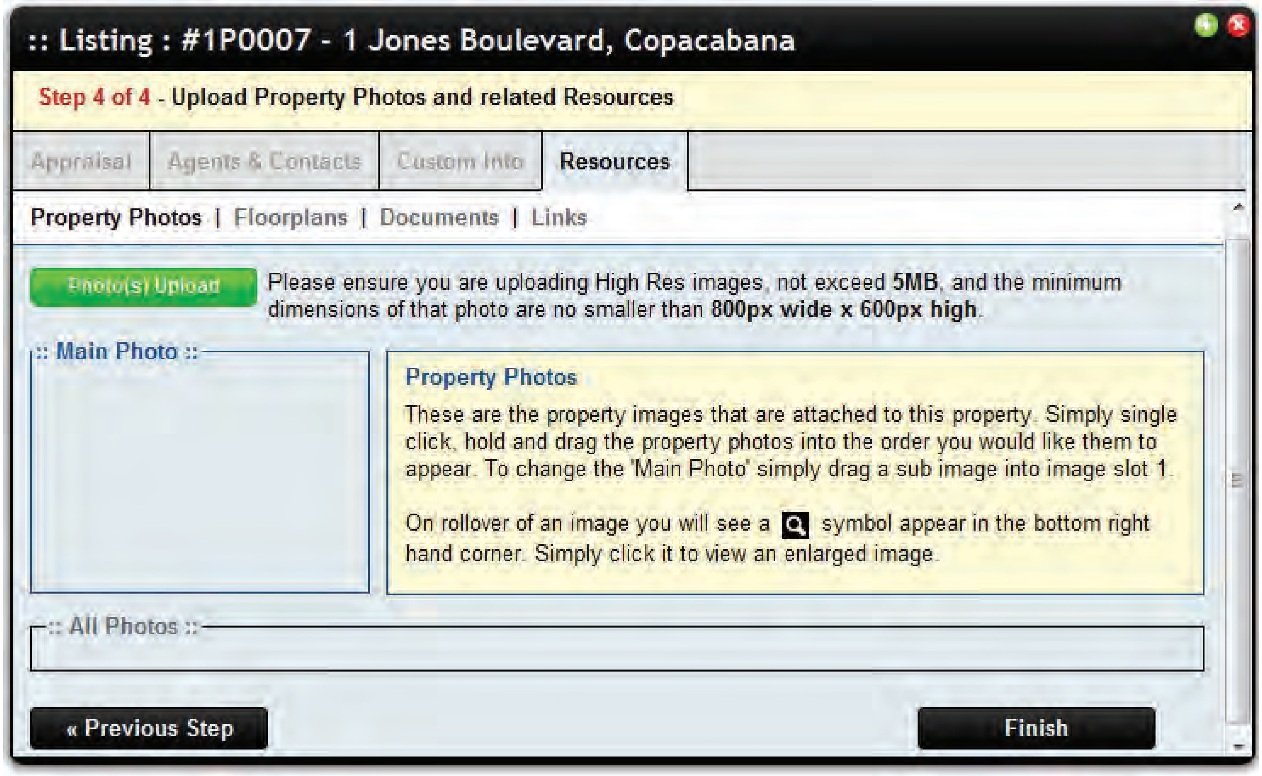


6. Click Save and Proceed and enter in any custom info - Please note this information will not be carried across if converted to a listing.

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

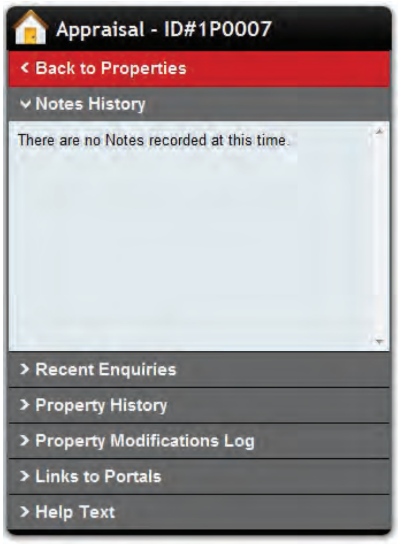


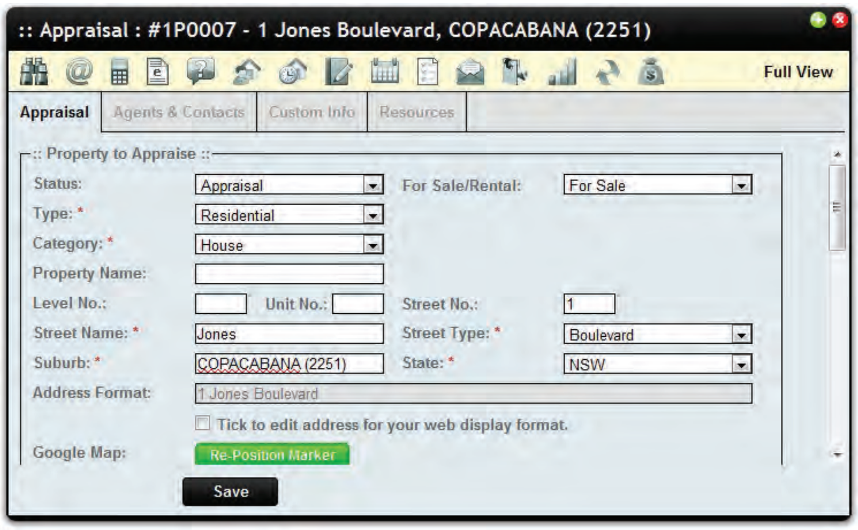
7. Click Save & Proceed to upload any Resources



8. Click Finish

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





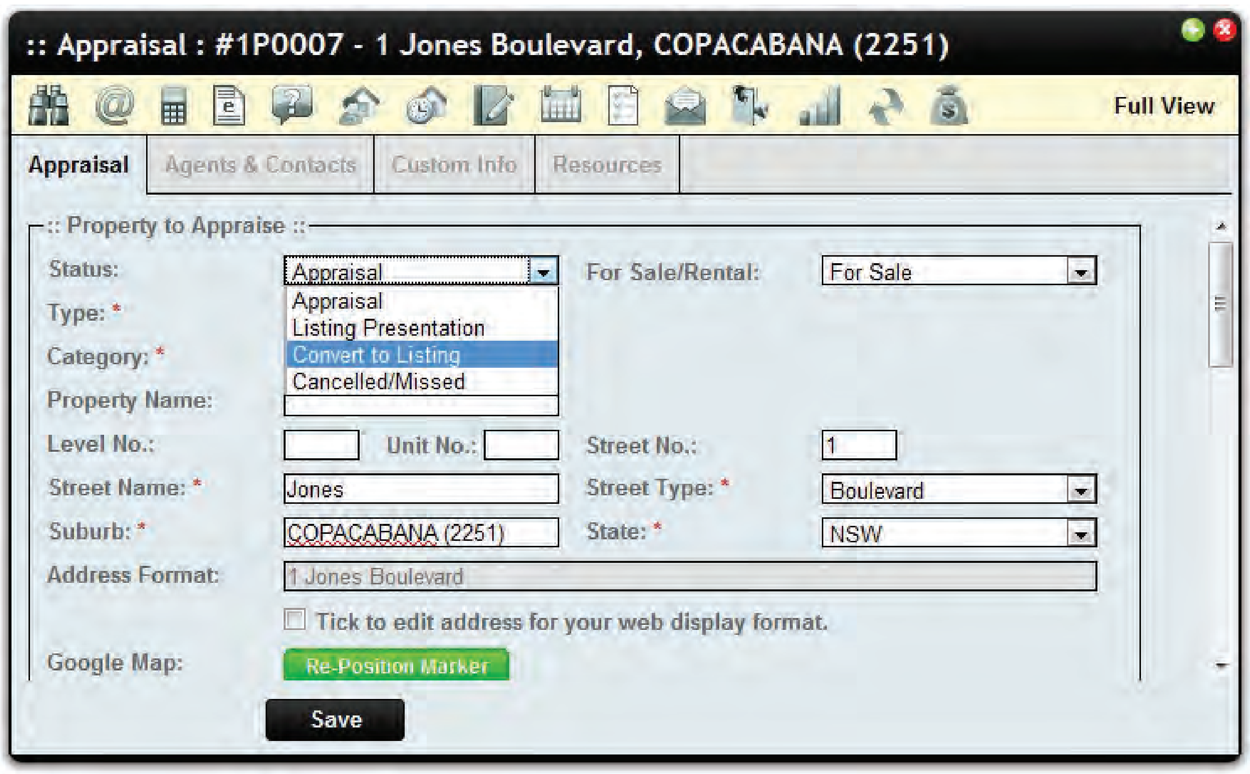
Convert to Listing or Missed

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

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

2. Select the new status from the drop down menu.

- **Listing Presentation** - This status has the same functionality and look of an appraisal however is an additional search category for properties that you have gone out and presented to (presentation date must be entered for reporting).
- **Convert to Listing** - This will convert the appraisal to an Offline Listing with the Status - Offline - Not ready for Public Display. You will then need to add all the relevant information to change the property to Available/On Market (Listing Date/Agency Agreement date must be entered for reporting).
- **Cancelled/Missed -** This marks the property as Offline with the reason - cancelled/missed appraisal (with the option to 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.



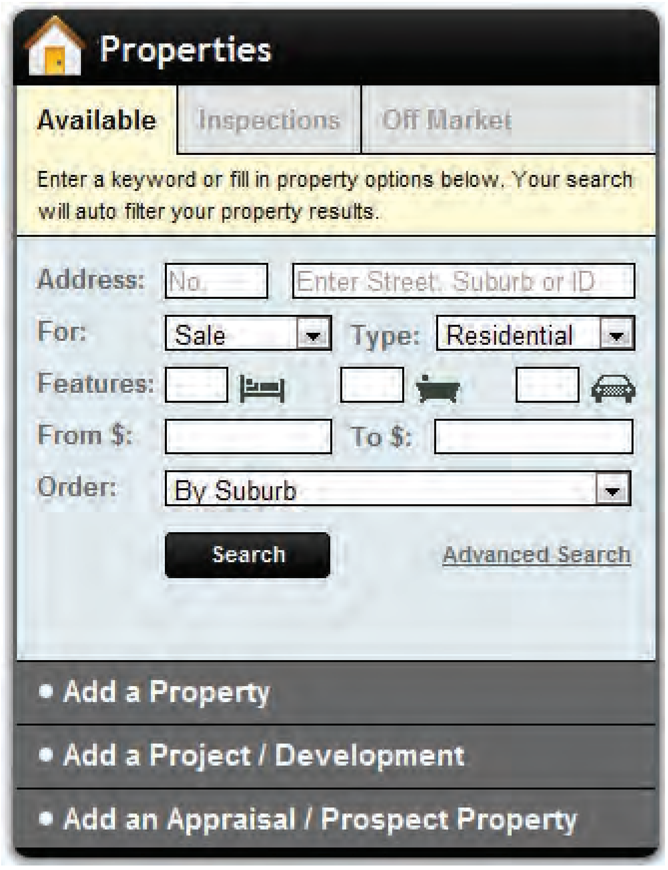
3. Click Save, and the property card will reload in it's new status.

Add Property

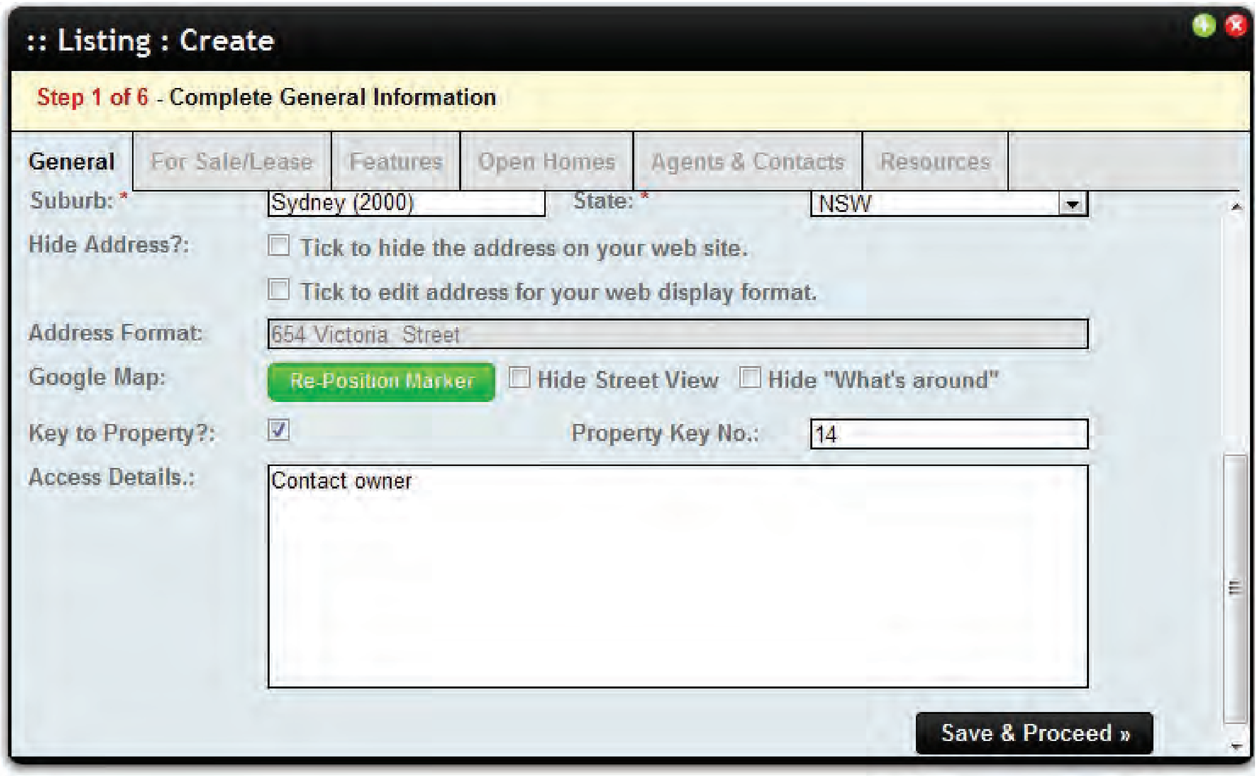
How do I add a new sale or rental property?

1. Go to Properties from the main menu.

2. Click on Add a Property on the left property panel.
**Note: if you are unable to see this button please contact a Master user in your office and get them to check your permissions.*



3. Complete the General Property Information.
Status: - Will default as offline - not ready for public display. You will need to upload all resources before changing the status to available
For Sale/Rental: - Select the type of property, the form fields will update based on your selection.
Type: * - E.g. Residential, Commercial - Select the type of sale or rental and the category fields will update based on your selection.
Category: * - Select category based on your type e.g. Commercial categories include Retail, Office, Warehouse etc. (If commercial you can select up to 3 categories to export to the portals)
Investment?: - This is for internal reference only on sale properties
Sale Method: - If a sale property, you will need to specify the sales method e.g. Auction. Once selected you will be able to enter additional information for this method e.g. dates, times, location etc.
Property Name: - Enter the name of the property if applicable.
Level No.: Unit No.: Street No.: - All address fields are to be entered separately. You can change the display of the address or hide from public display later.
Street Name: *
Street Type: *
Suburb: * - Start typing the Suburb then select from the dropdown. This will copy if converted to a listing.
State: * - This will auto generate if Suburb is selected. This will copy if converted to a listing.
Hide Address?: - Tick to hide the address on your web site - This will hide the street address on both your website and all portals e.g. realestate.com.au and will only show the suburb.
Tick to edit address for your web display format. - This will adjust the display of the address on your website, digital prints and e-newsletters only.
Google Map: Hide Street View Hide "What's around"
Key to Property?: - Internal reference only
Property Key No.: - Internal reference only
Access Details.: - Internal reference only



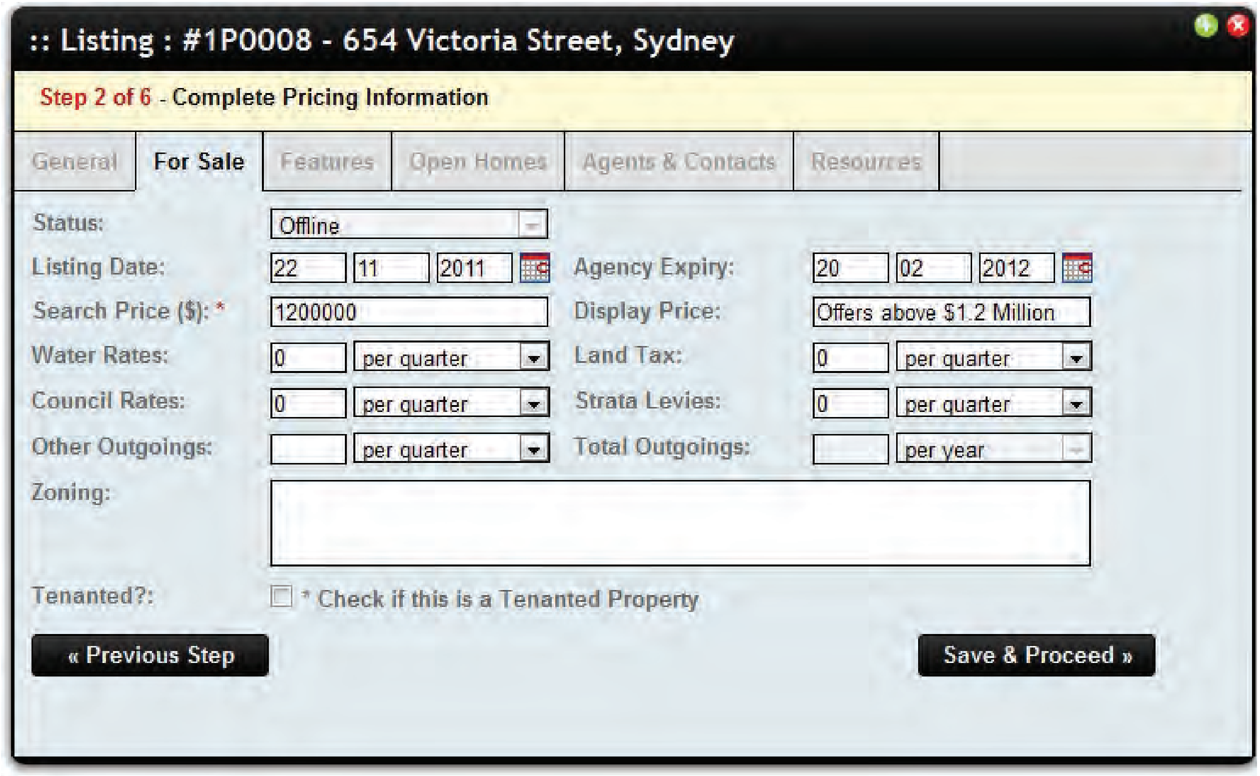
4. Click Save & Proceed

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

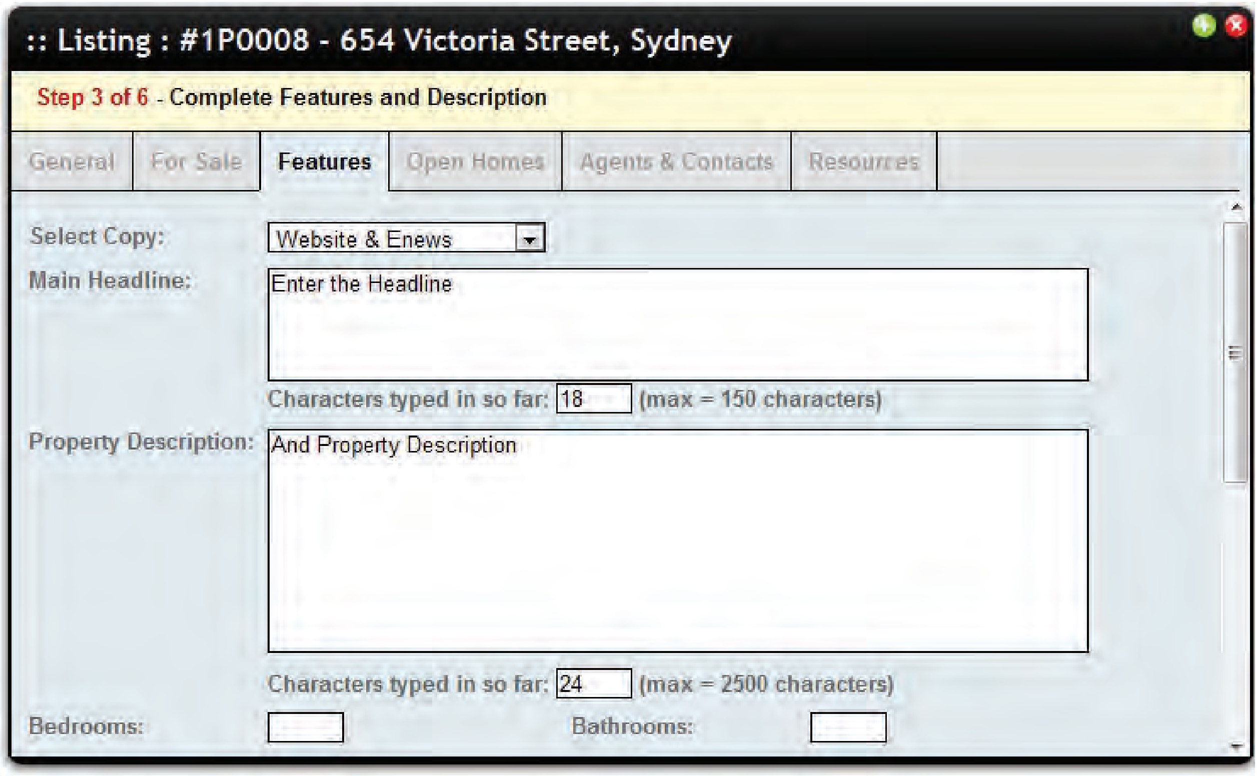
Tenanted?: * Check if this is a Tenanted Property

:: 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

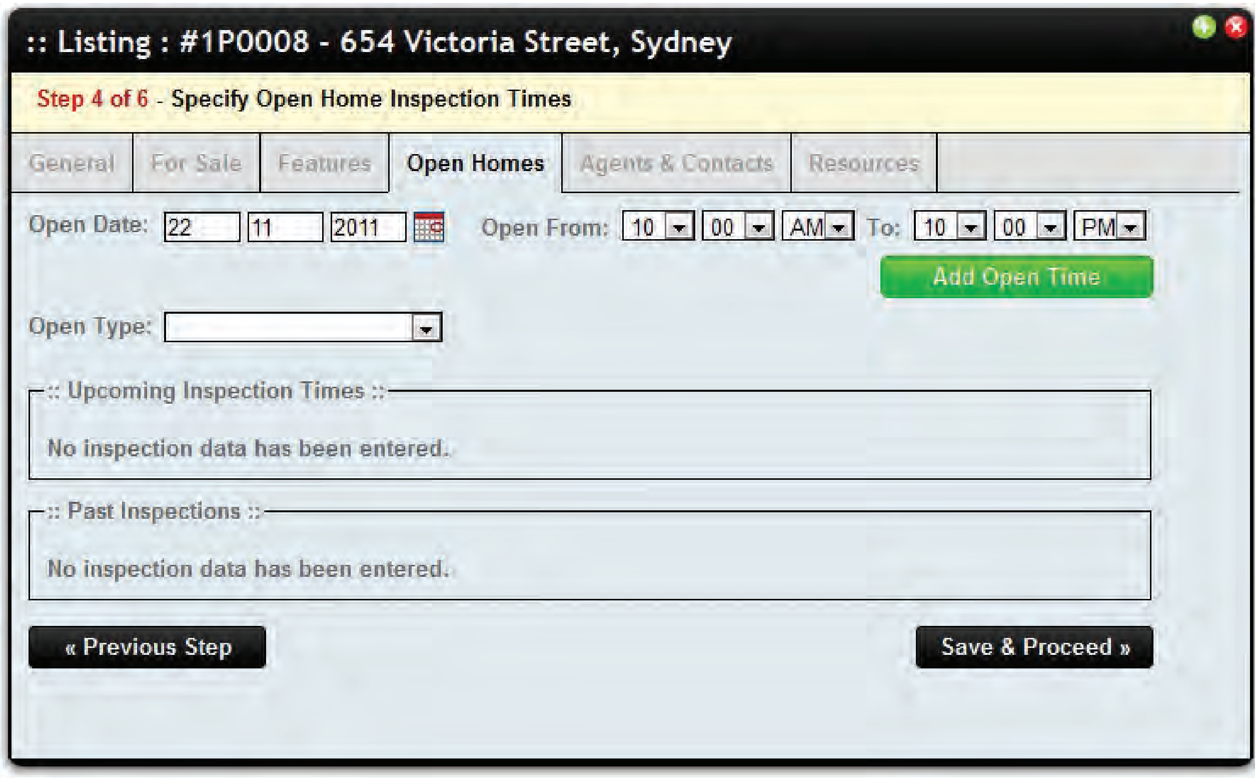


6. Click Save & Proceed to enter the property features and decription.

:: 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: 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



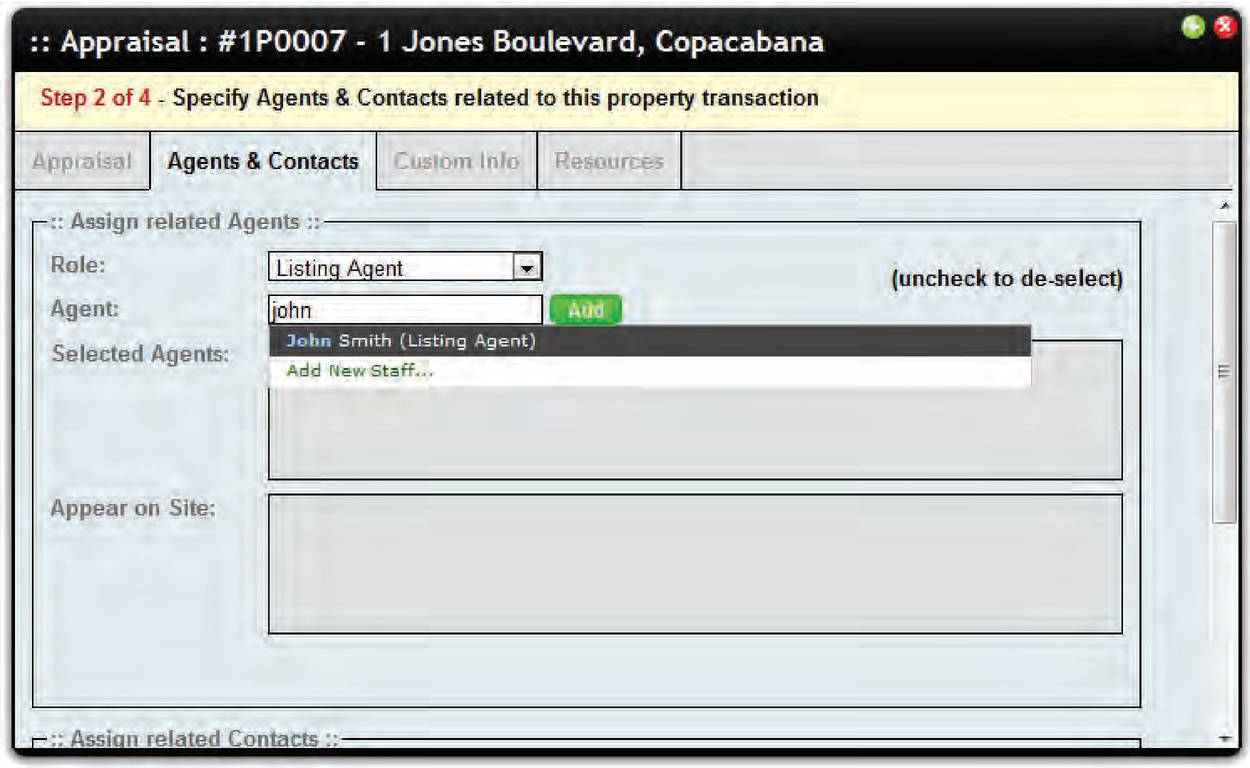
7. Click Save and Proceed to add in inspections times
    - Select the Date and time and click Add Open Time
    - or Select the Type from the Open Type drop down



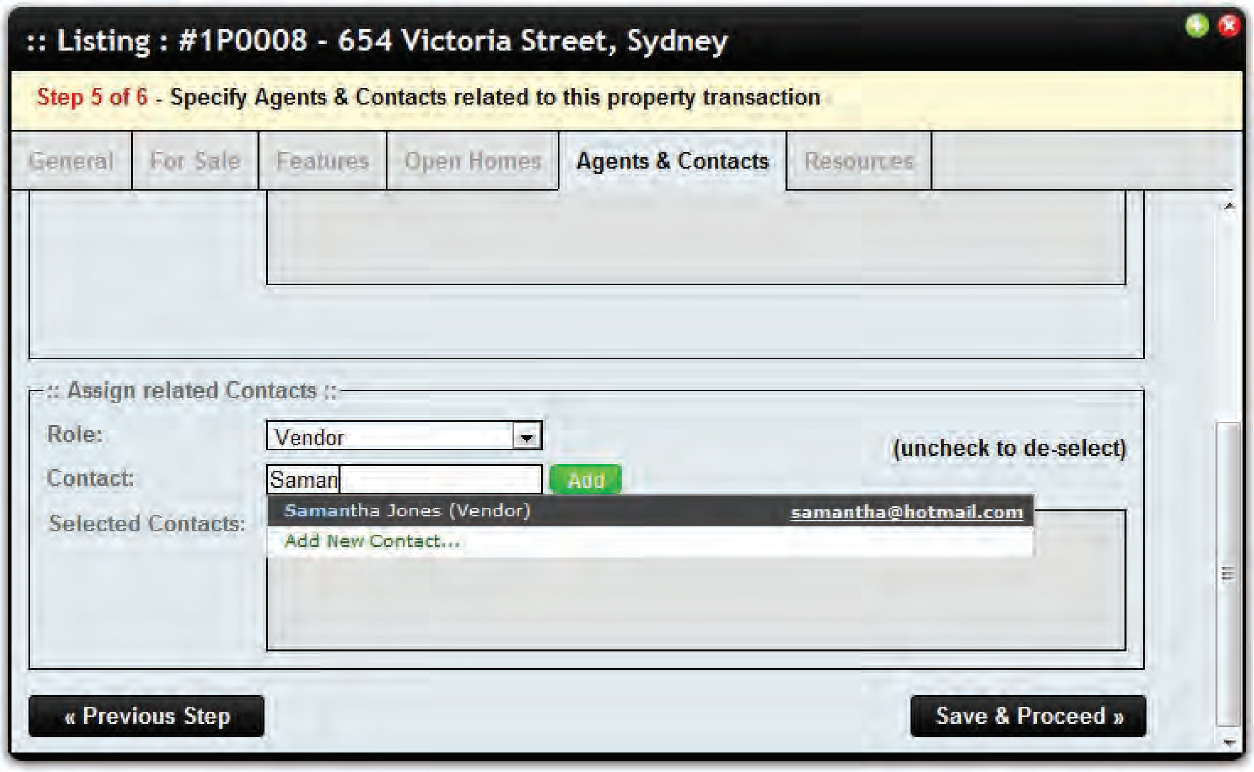
8. Click Save and Proceed and assign any related contacts or agents.
    - Select role from drop down
    - Type Agent name and select from results.

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

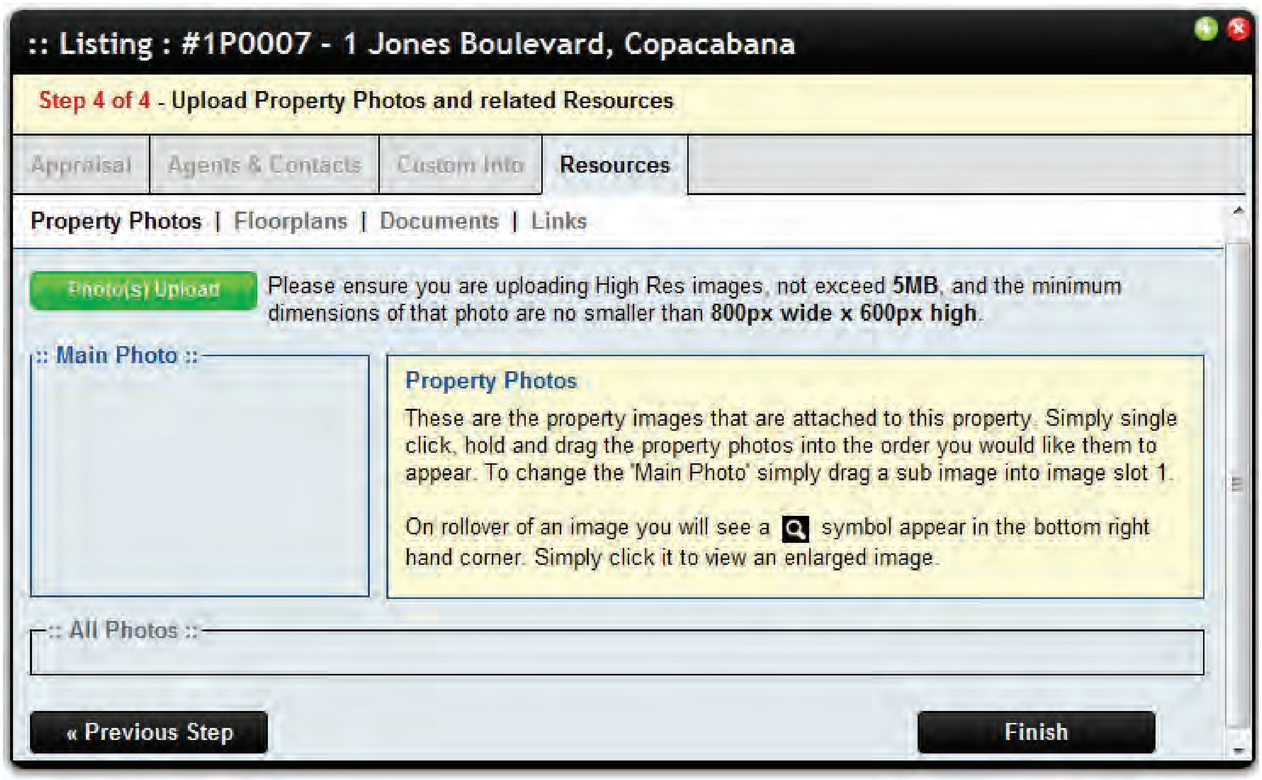
**Note: for reporting and commissions it is important that all related agents are assigned to the property. The first Selected Agent box should contain an Appraisal Agent, Listing Agent, Selling Agent and any referral agents by the end of the sales process.*



**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.*



9. Click Save & Proceed to upload any Resources

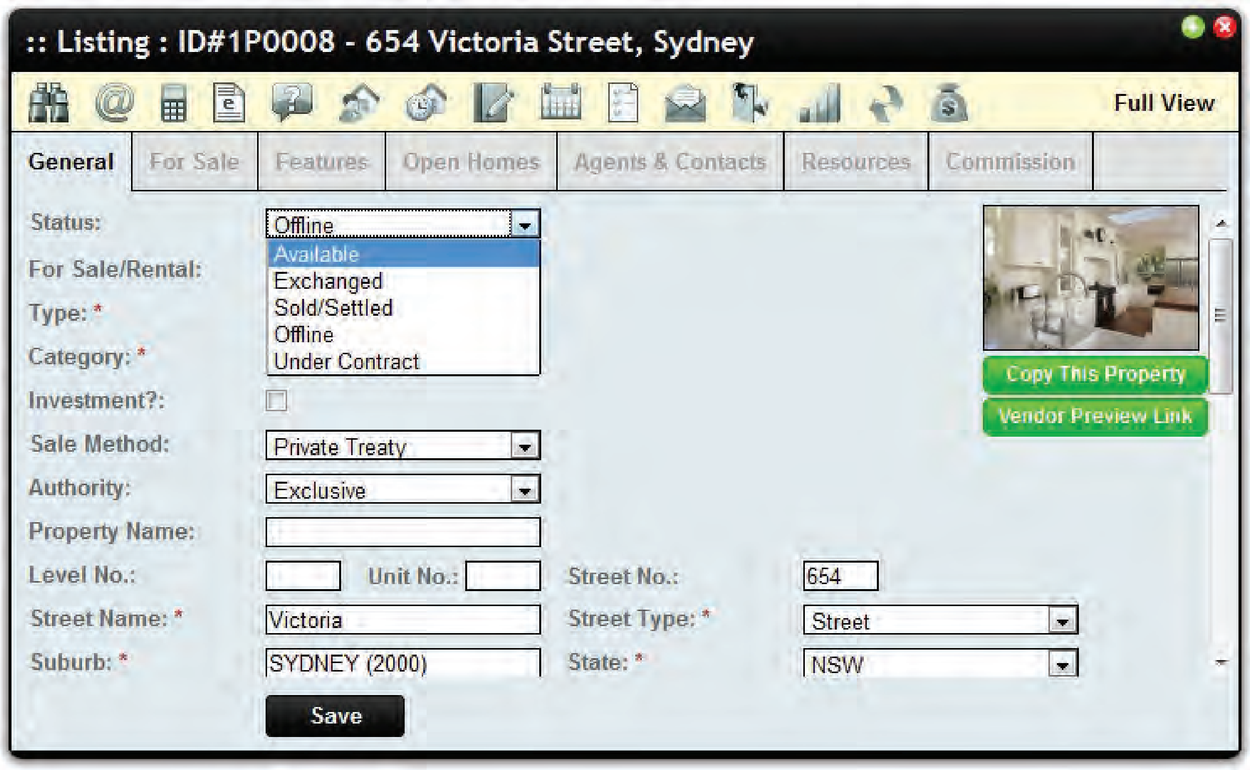


8. Click Finish

9. You can now..

- Start using all property action icons and all items from the left property panel.

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



Changing Property Status

Changing a property status

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

Available: Property advertised on your website and portals as **current/available**
Under Contract: Property advertised on your website and portals as **'under contract'**
Exchanged - Conditional: Property advertised on your website and portals as **current/available**
Exchanged - Unconditional: Property advertised on your website and portals as **SOLD** [Sold Date = Contract Date]
Settled: Property remains advertised on your website and portals as **SOLD** [Sold Date = Contract Date]

Detailed Property Status Information

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

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

Property Resources

Property Resources

Property Resources include:

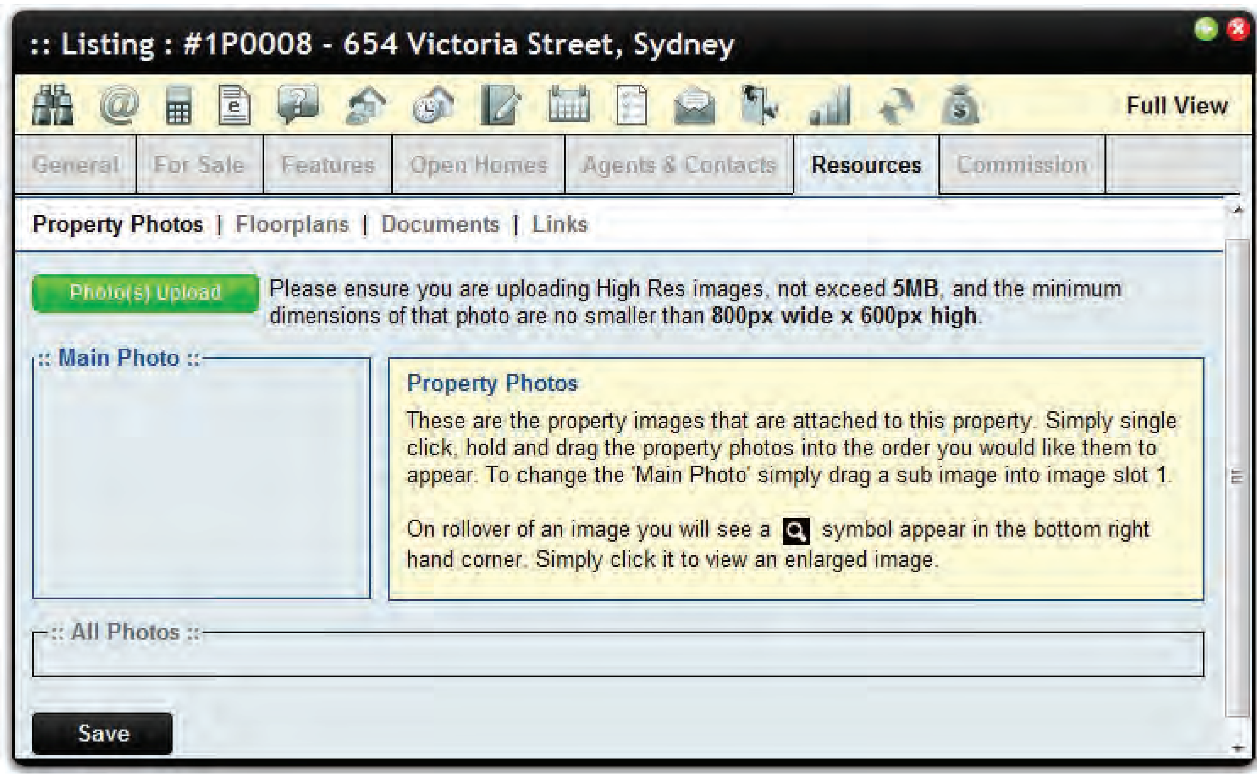
- [Property photos]
- [Floorplans]
- [Documents]
  - Agency Agreement
  - Property Contract
  - Sustainability Declaration
  - Other Documents
- [Links]
  - General External Link
  - Virtual Tour Link

Property Photos

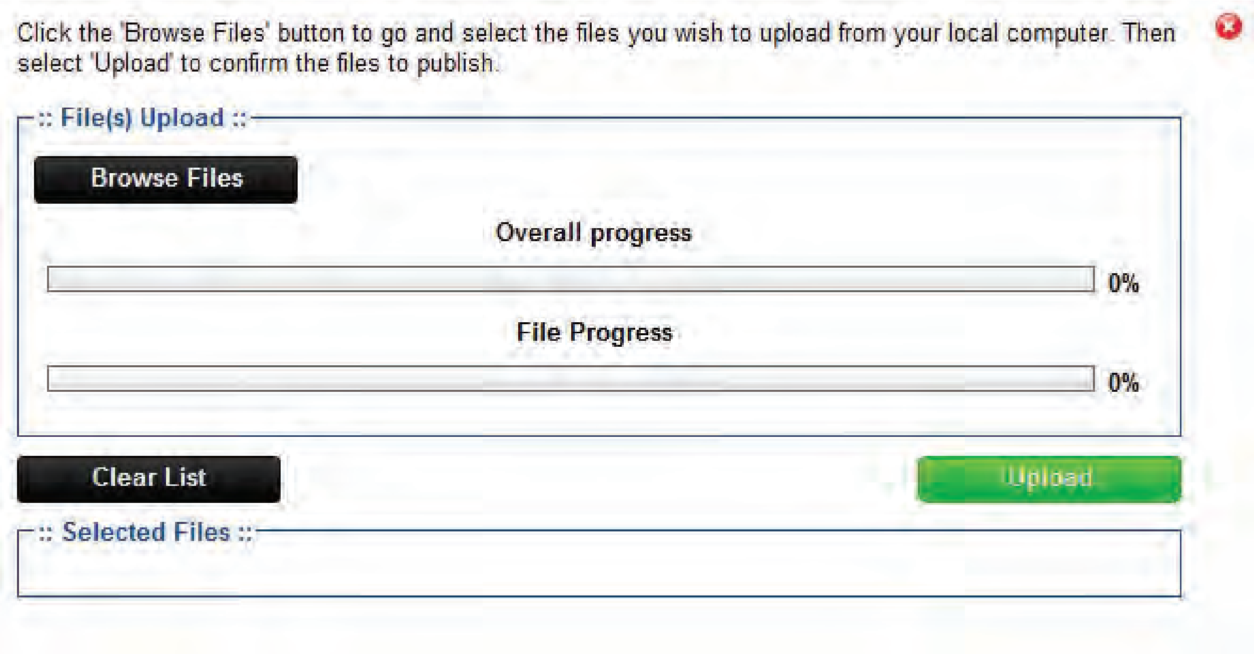
How do I upload Property photos?

1. Search for your Property and open the Resources Tab on the Property Card

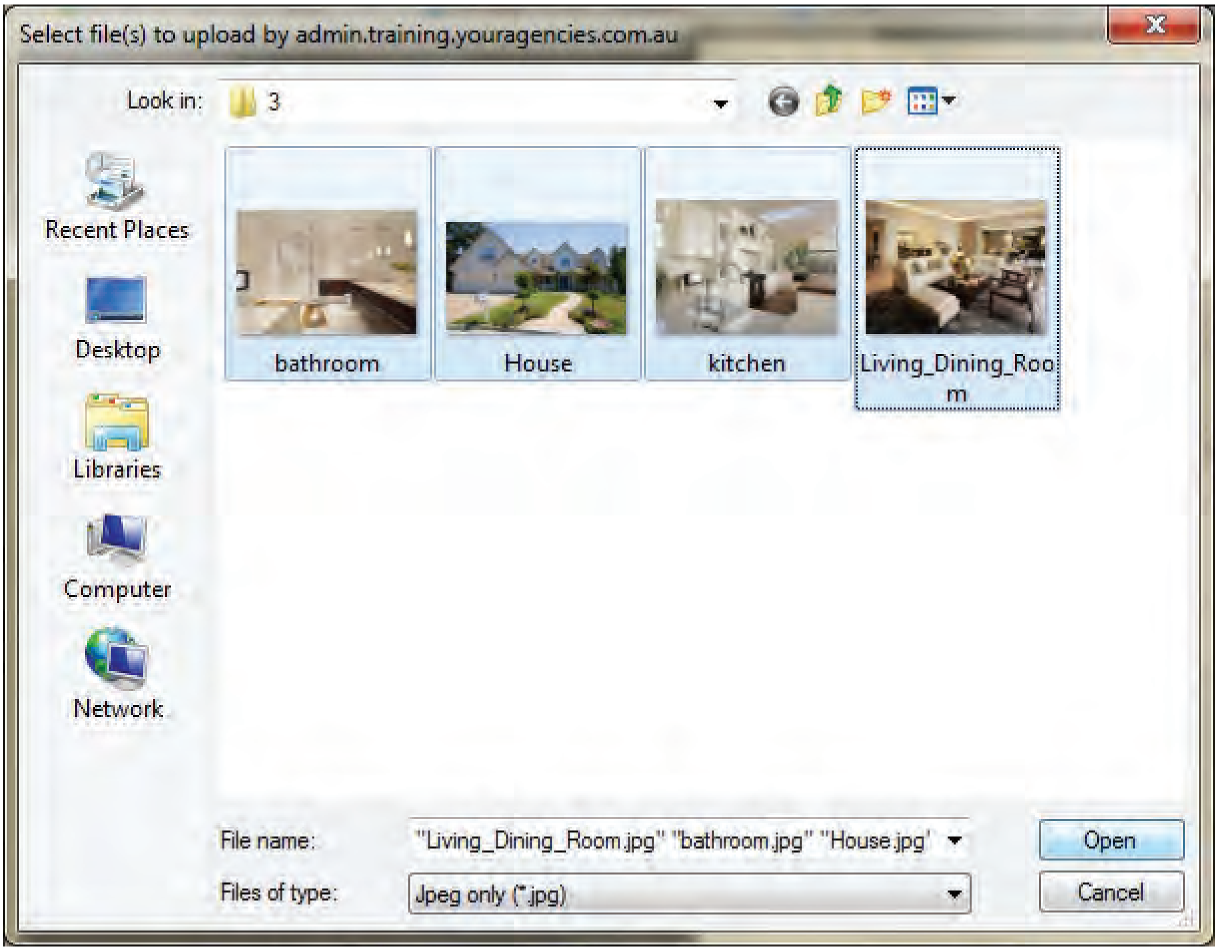
2. Click on the green Photo Upload button.



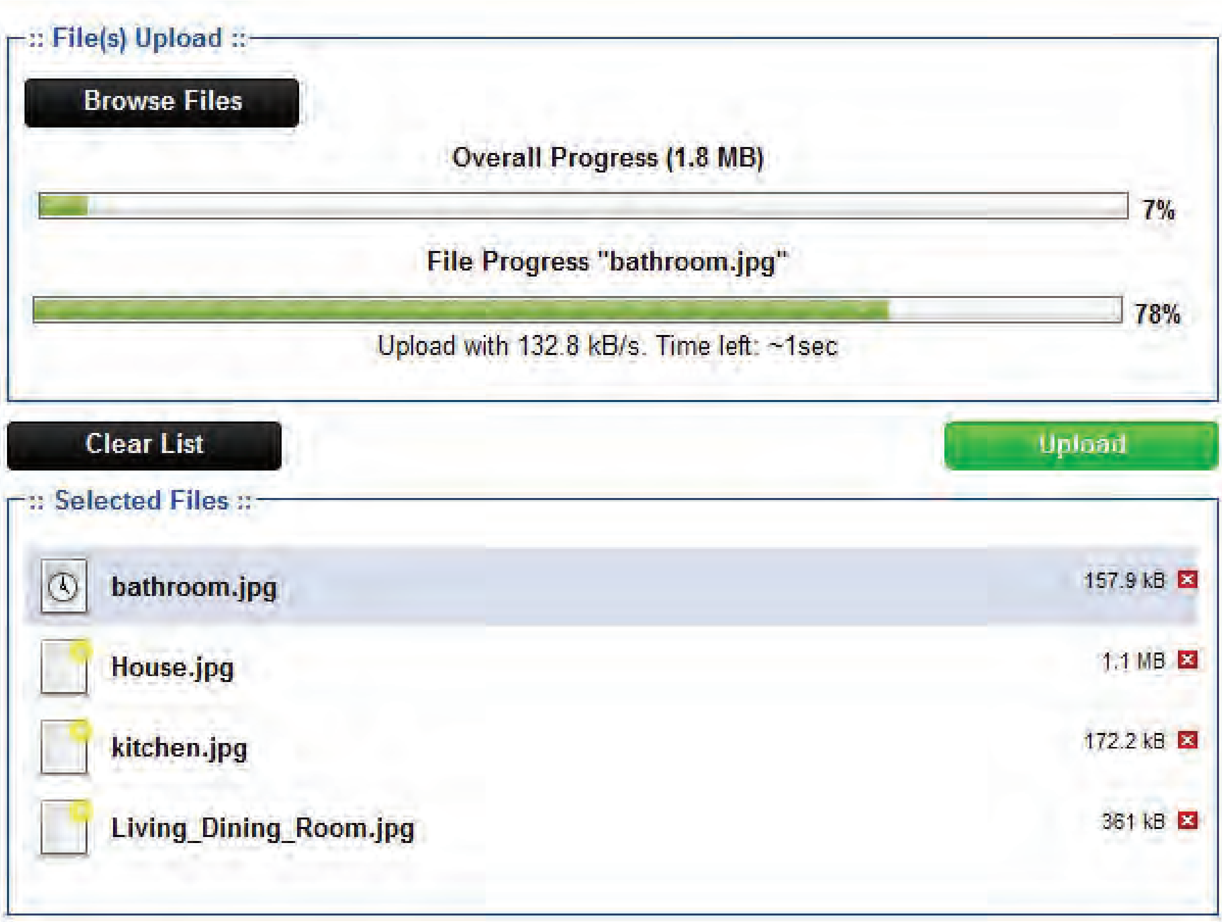
3. Click Browse



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



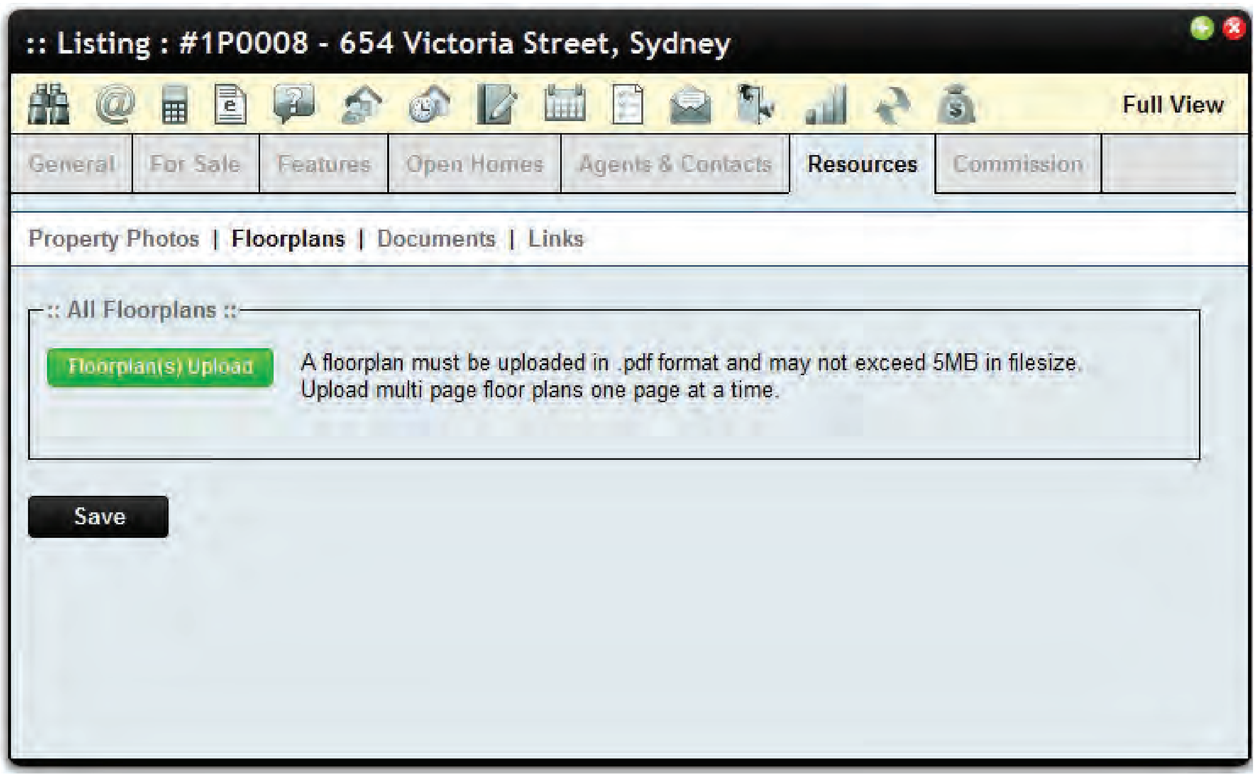
6. Once the upload has complete, the upload panel will disappear and you will be directed back to the resource tab, simply drag and drop the images to re-order. The image moved to the number one position will update as the main photo when you hit Save.

Floorplans

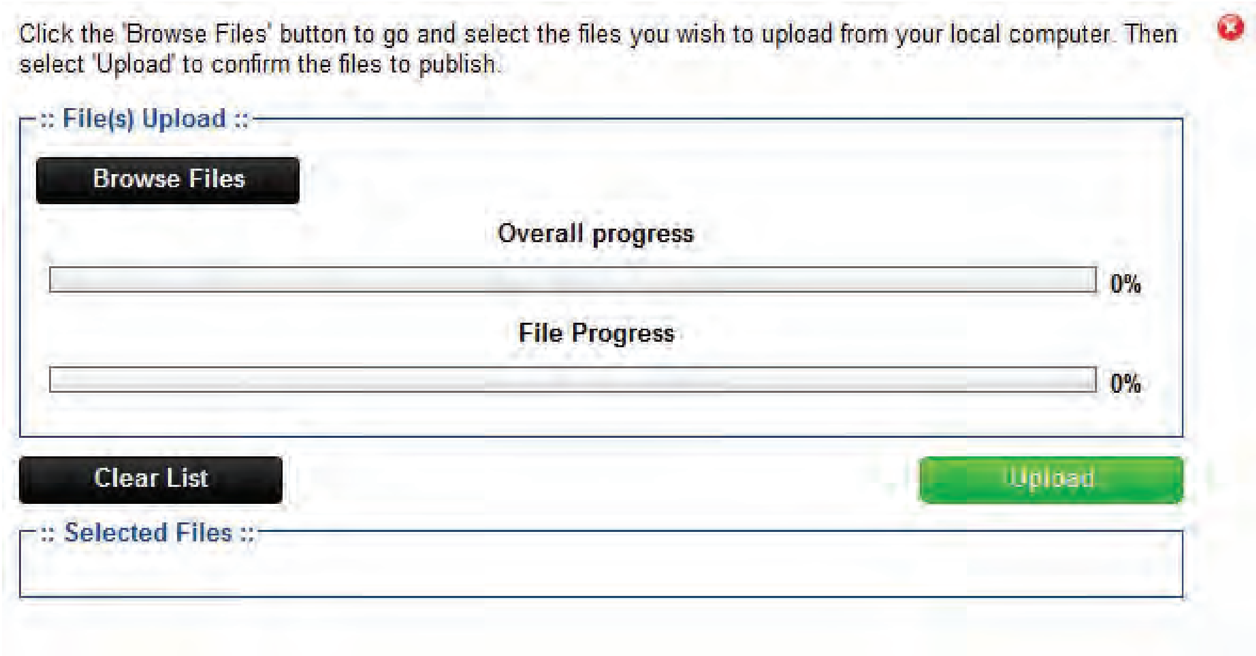
How do I add a Floorplan to a Property in Agentbox?

1. Search for your Property and open the Resources Tab on the Property Card

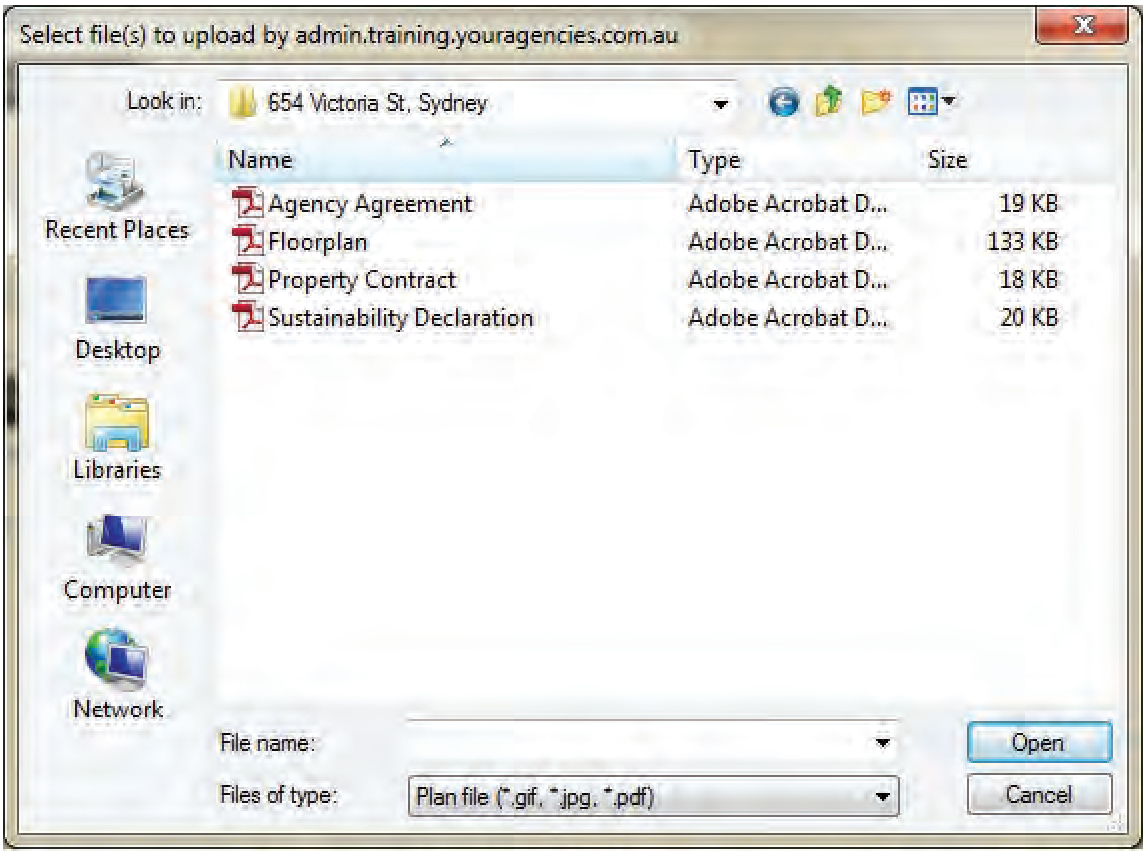
2. Click on Floorplans on the sub resources tab



3. Click on Floorplans Upload

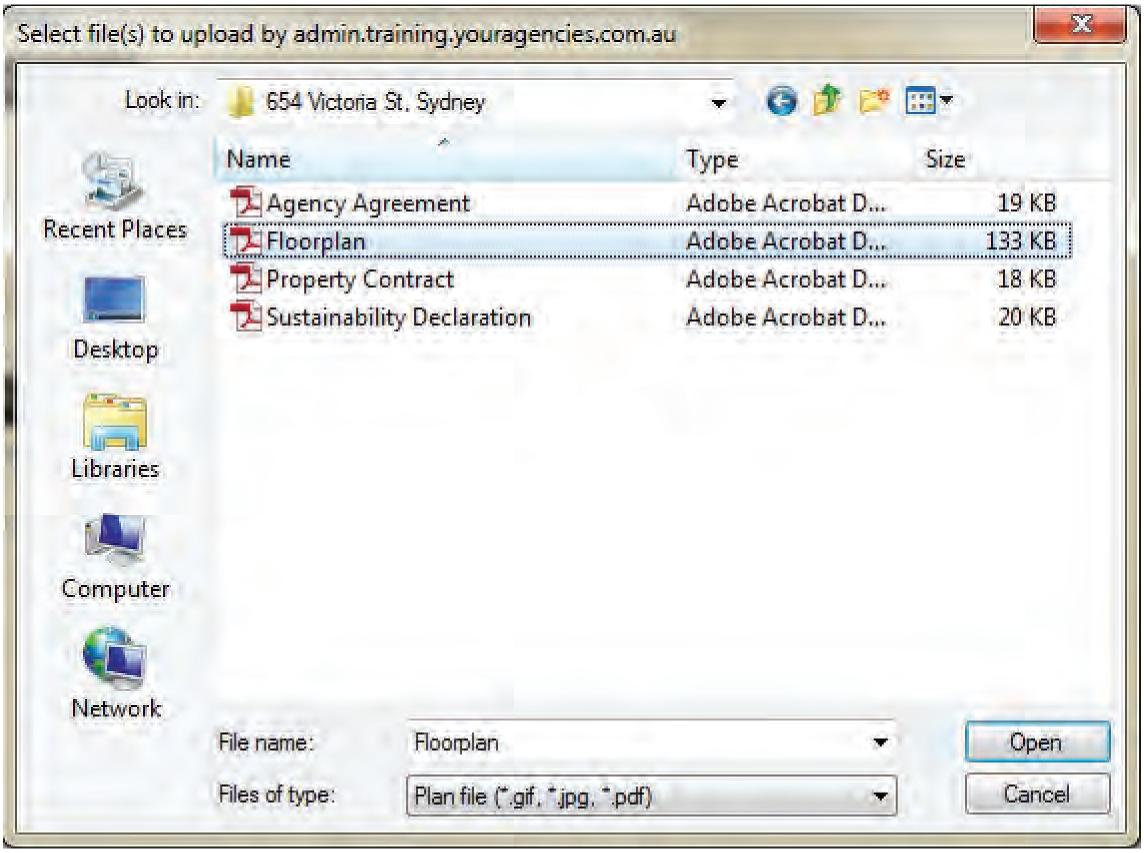


4. Click on Browse Files



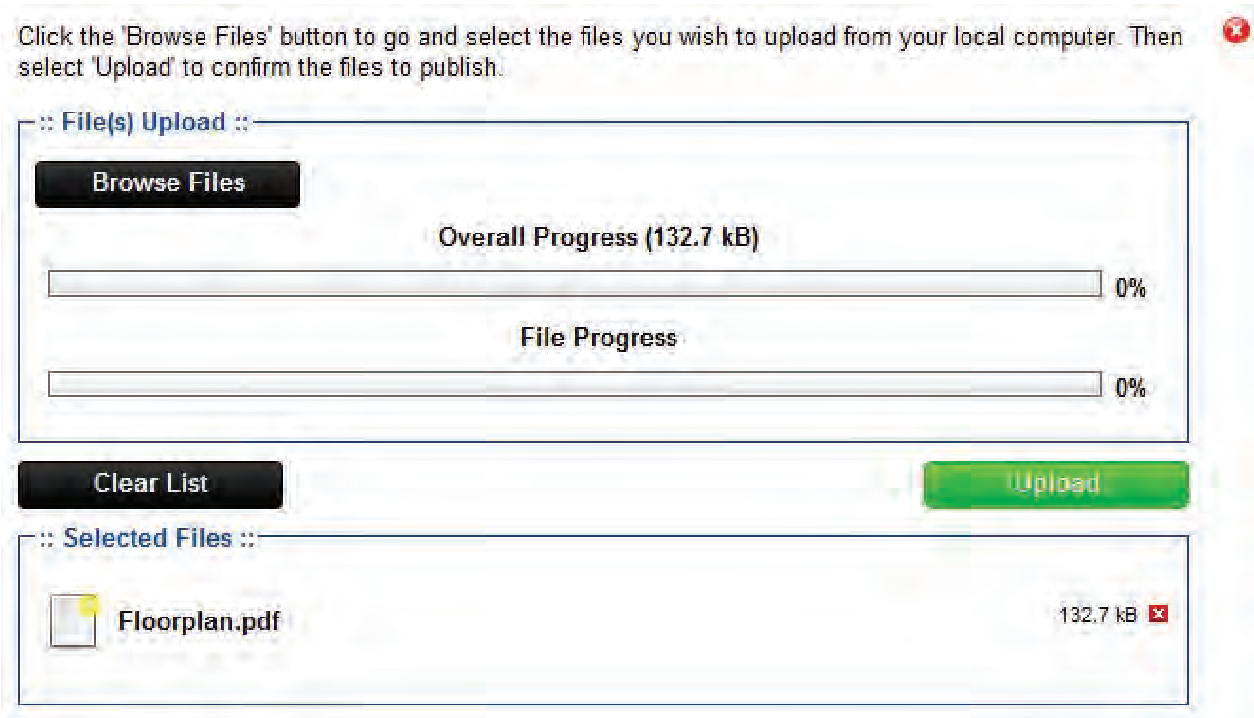
5. Select Floorplan from your file

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



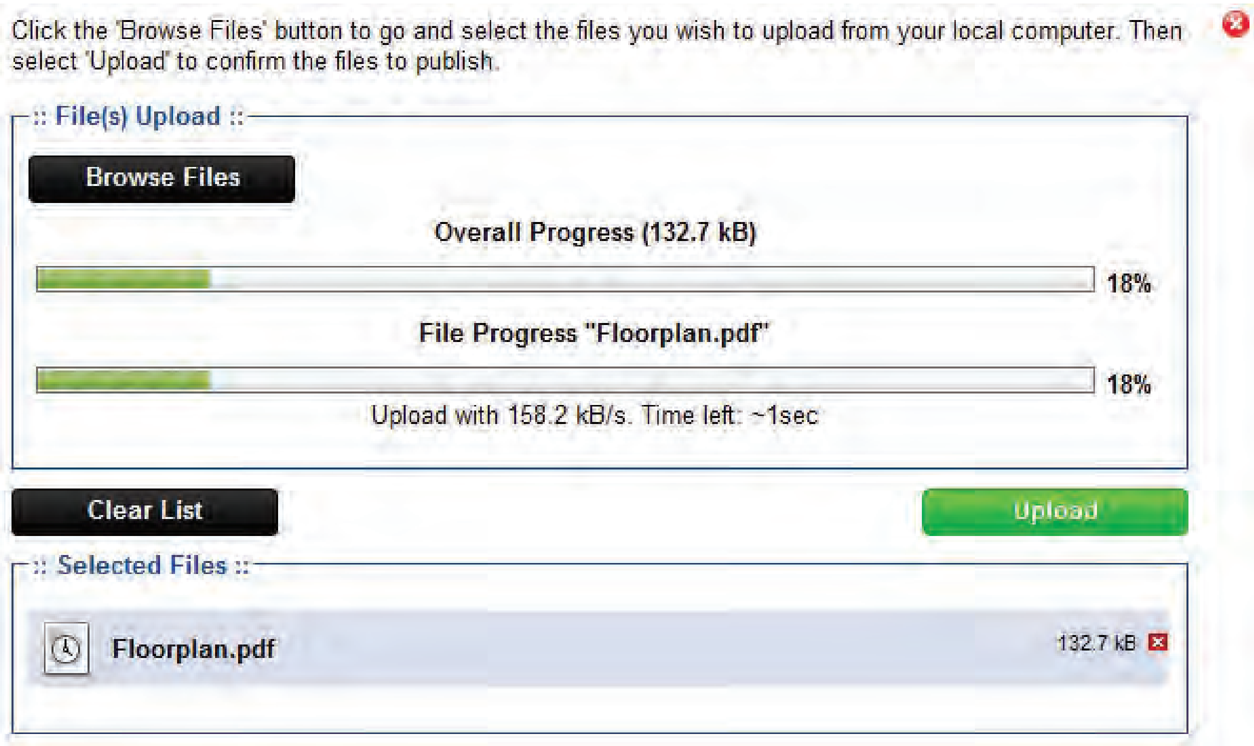
6. Click on Open

7. The Floorplan will appear on screen

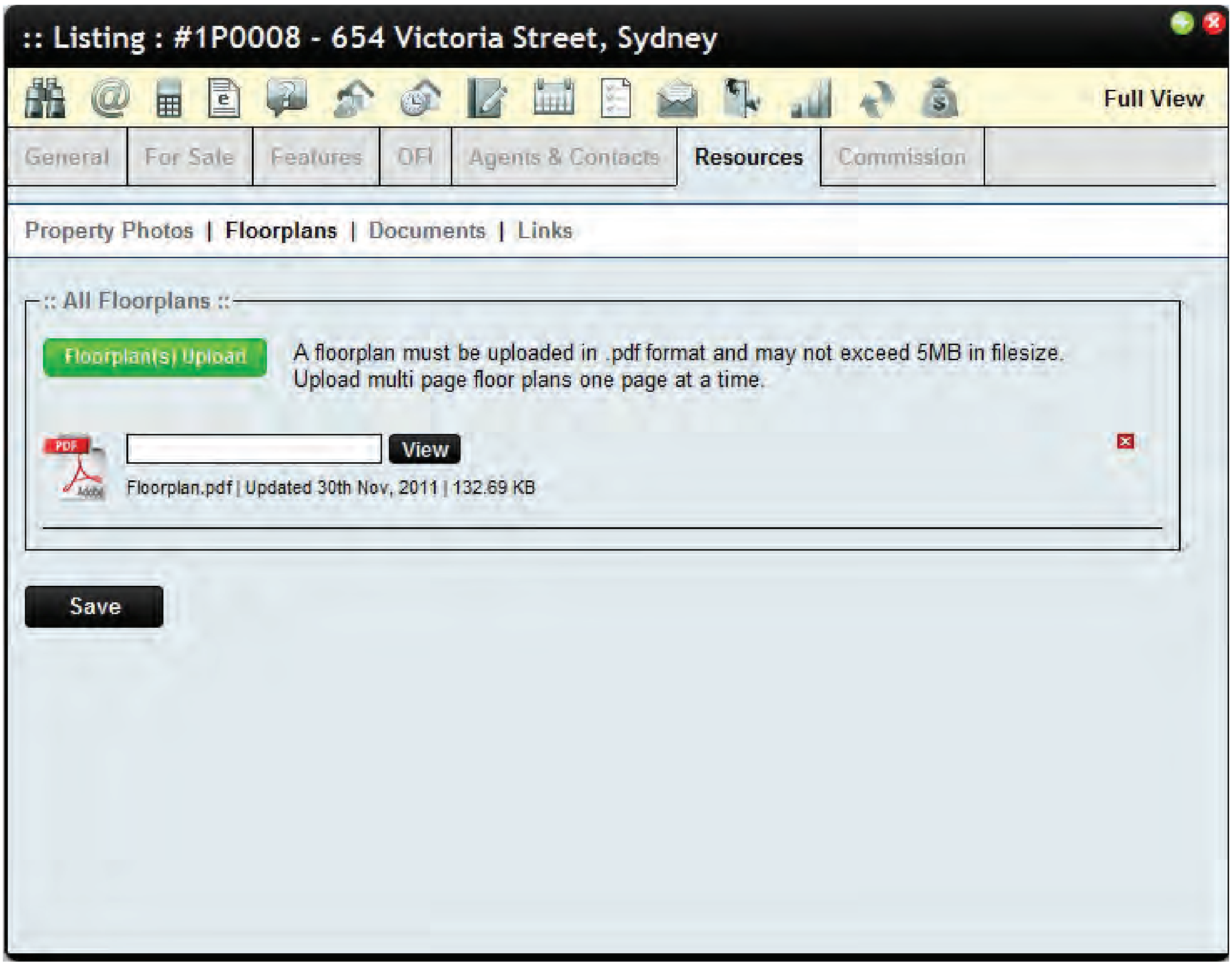


8. Click on Upload

9. Floorplan will upload



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



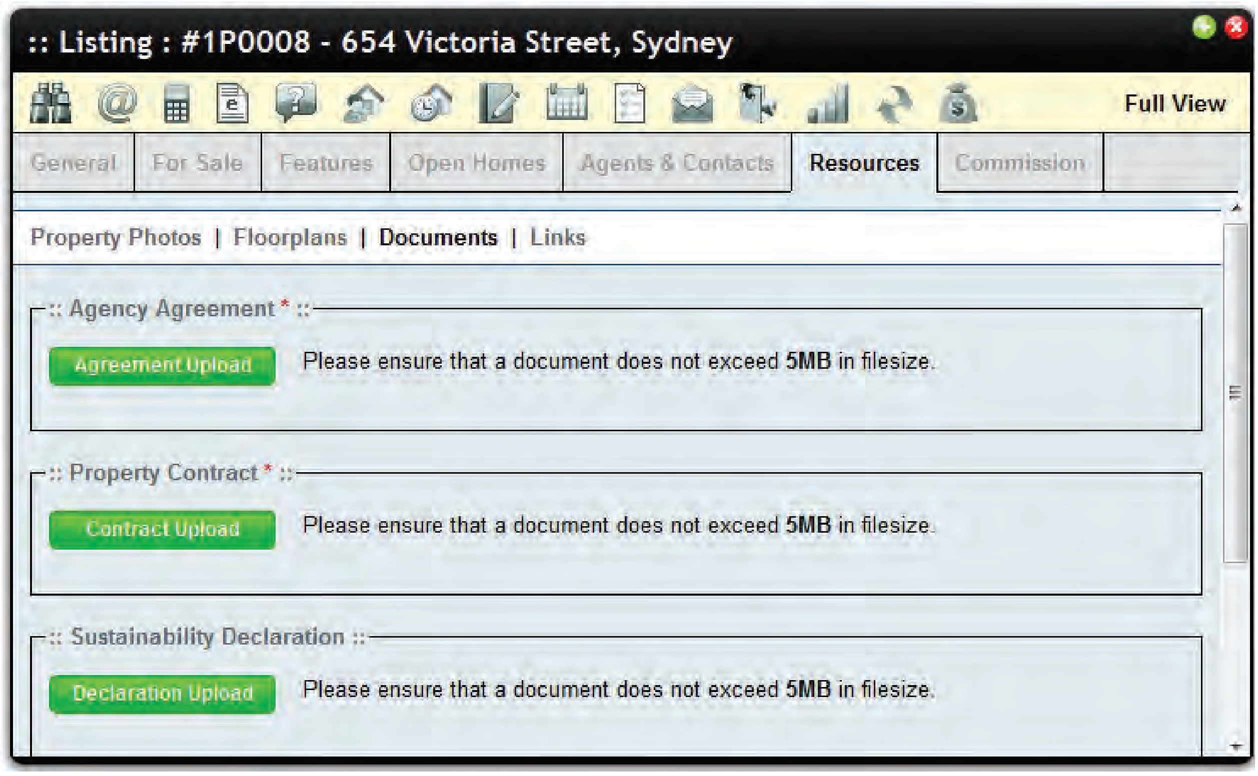
10. Click on Save

Documents

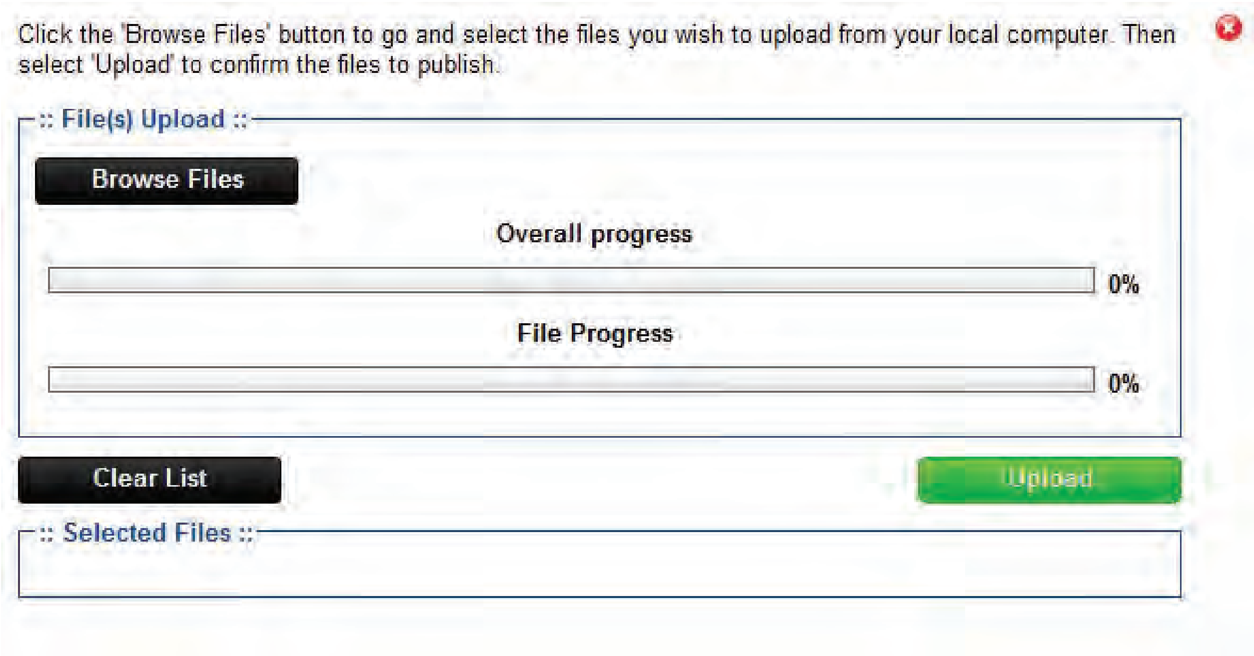
How do I upload Property documentation such as an Agency Agreement, Property Contract or Sustainability Declaration?

1. Search for your Property and open the Resources Tab on the Property Card

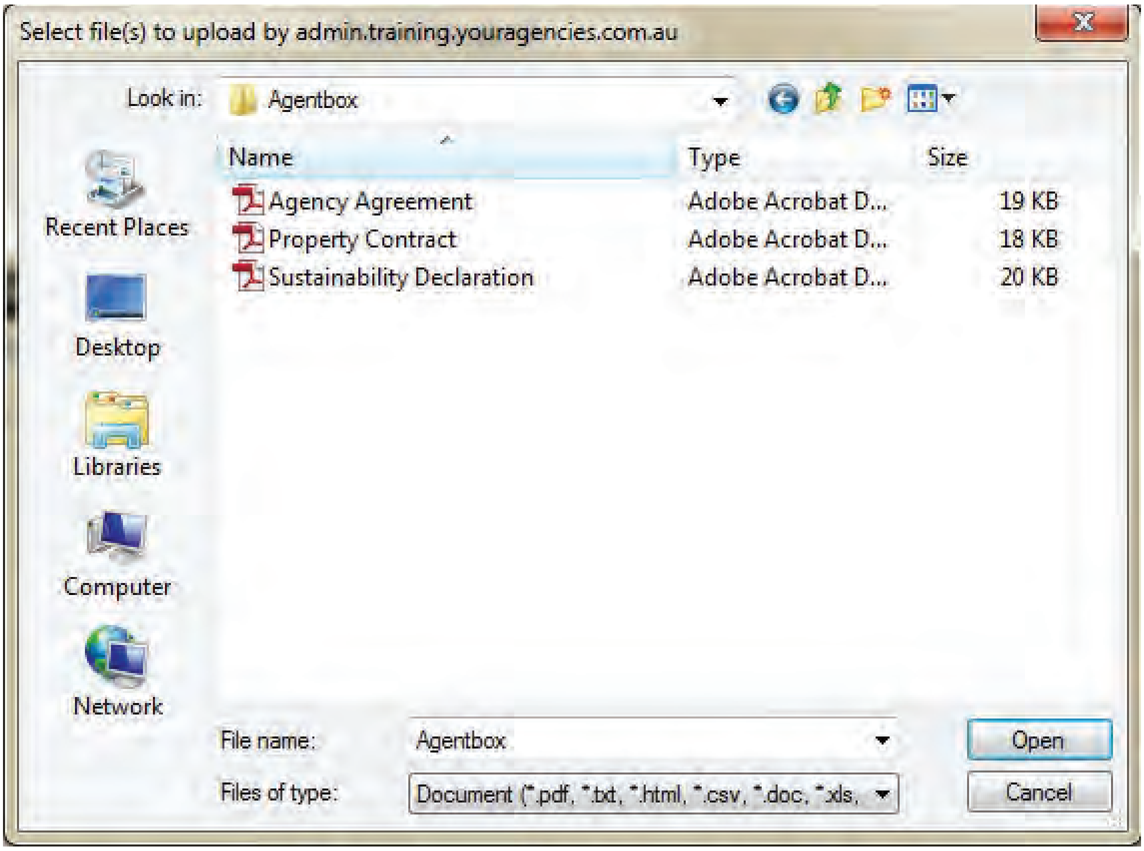
2. Click on Documents on the sub resources tab



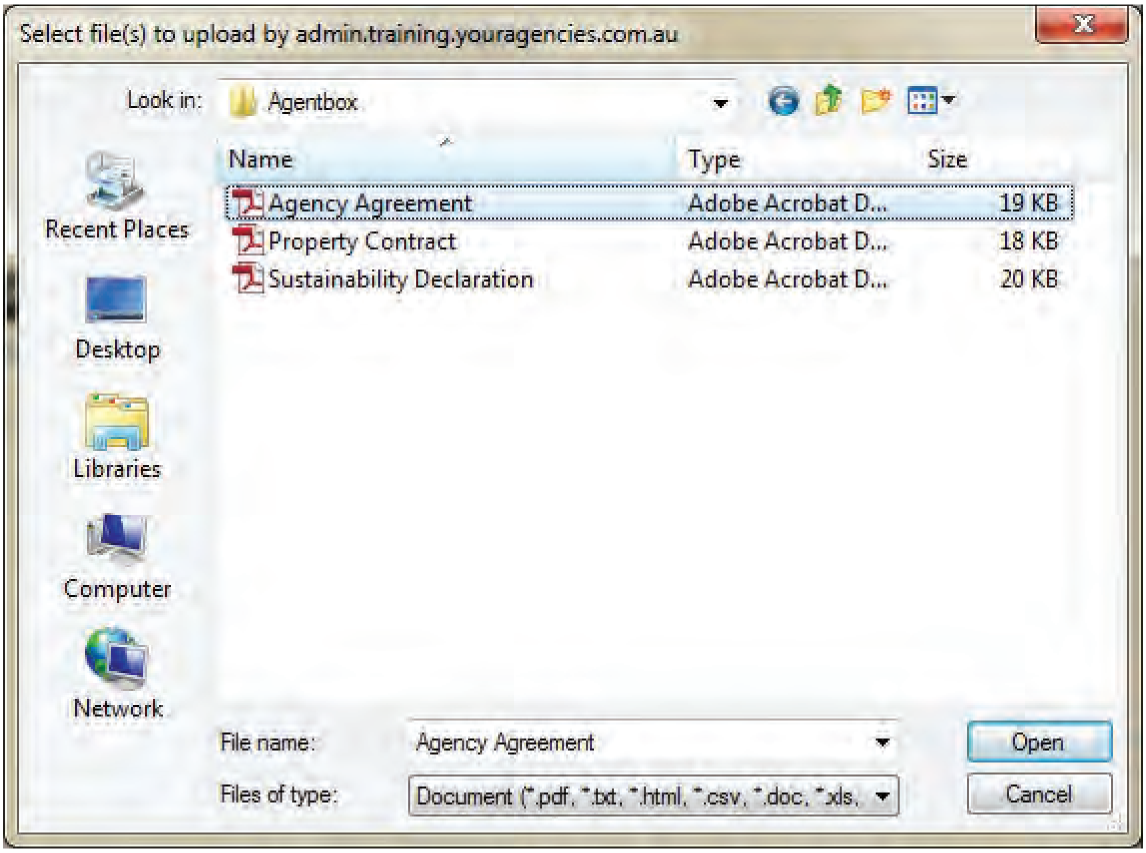
3. Click on the Upload button for the file you would like to upload e.g. Agreement Upload



4. Click on Browse Files

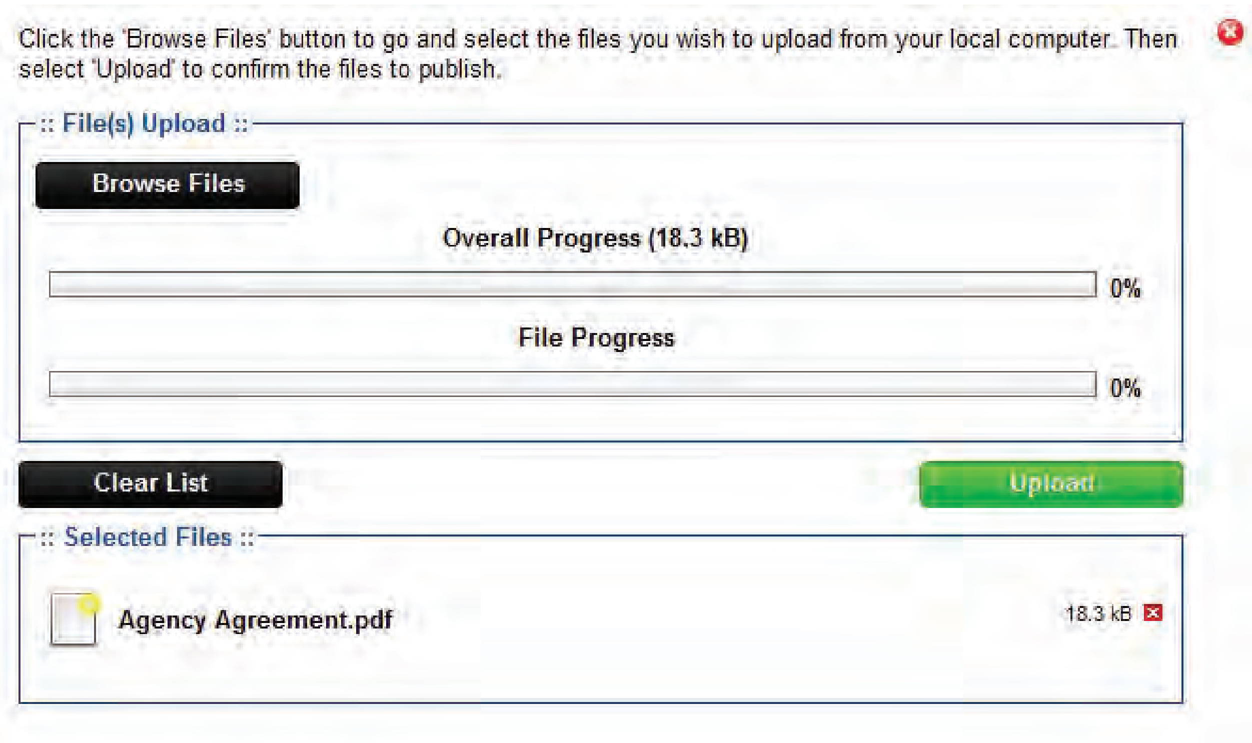


5. Select Document from your file

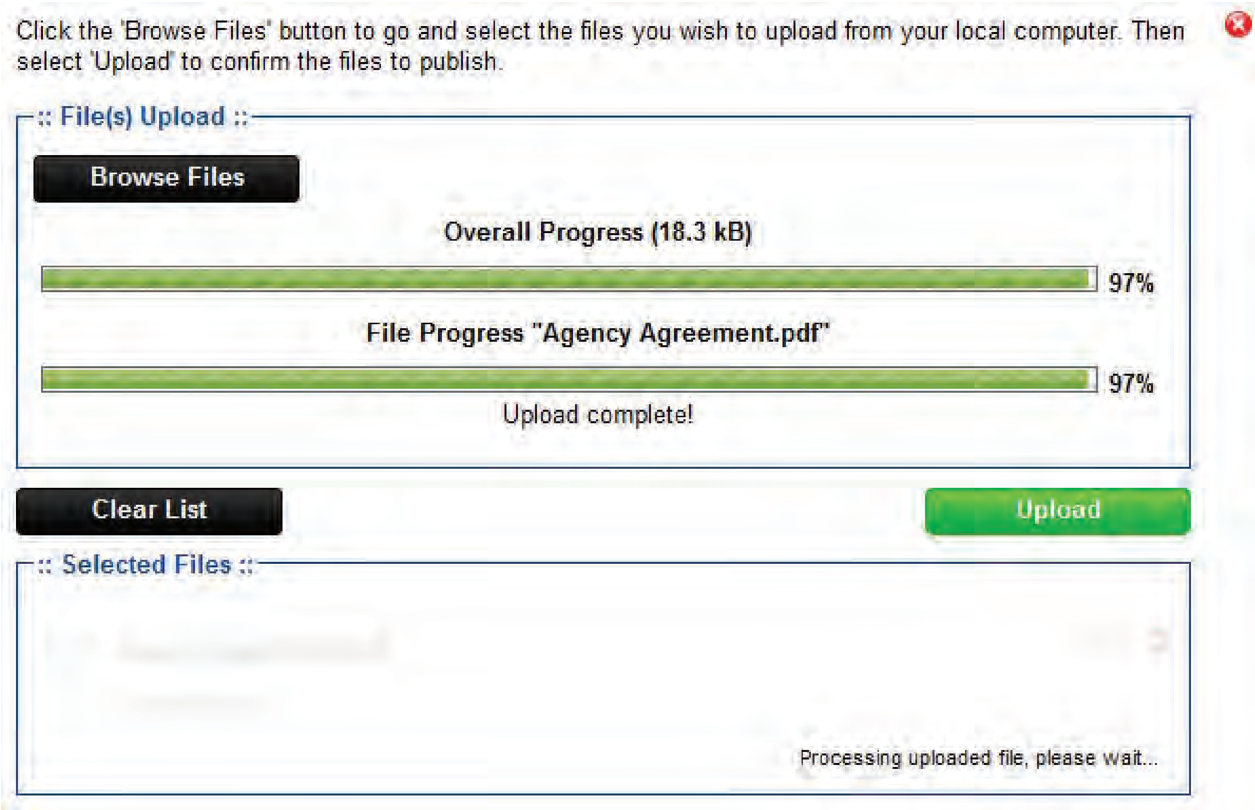


6. Click on Open

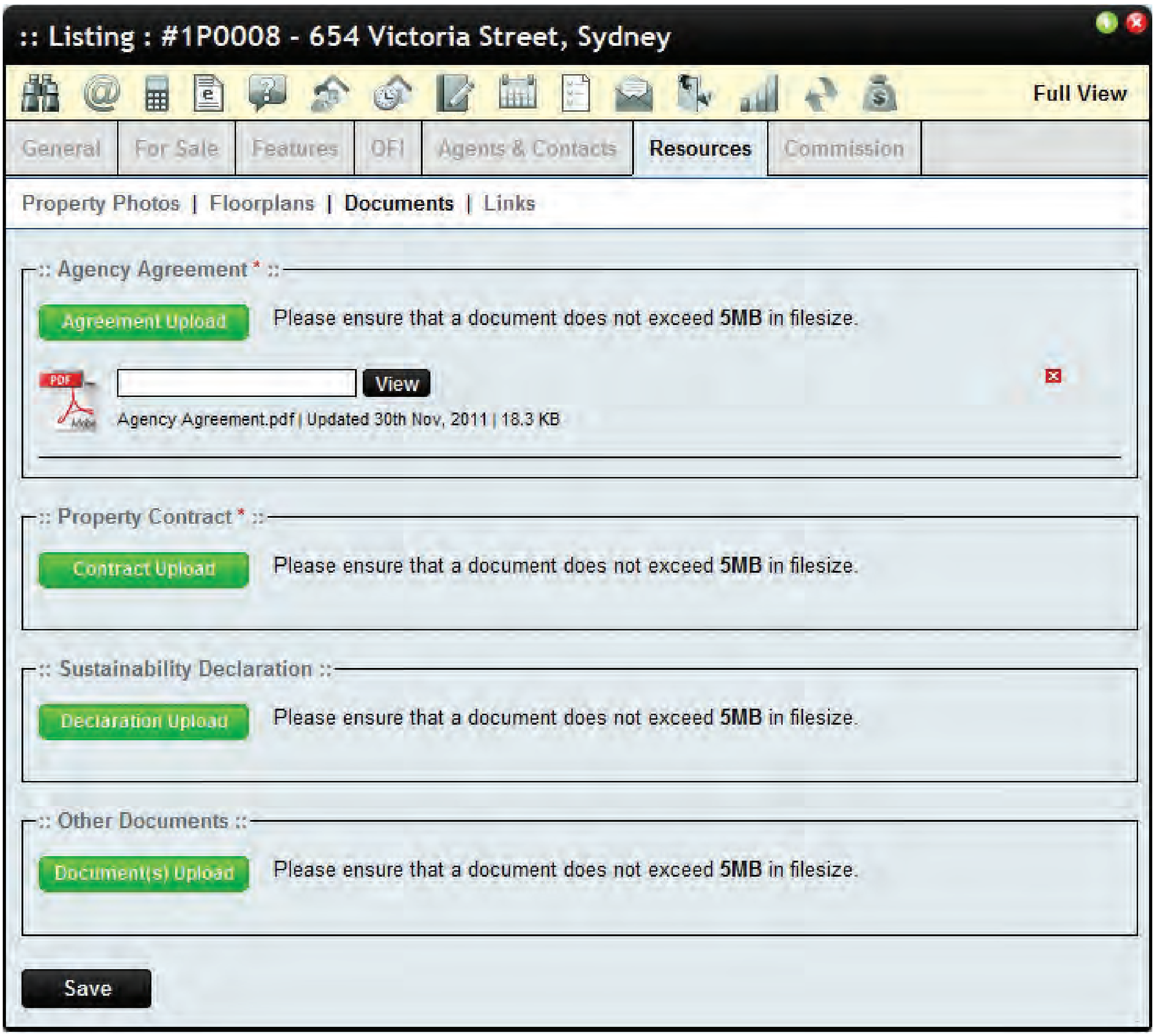
7. The Document will appear in a list on screen



8. Click on Upload



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



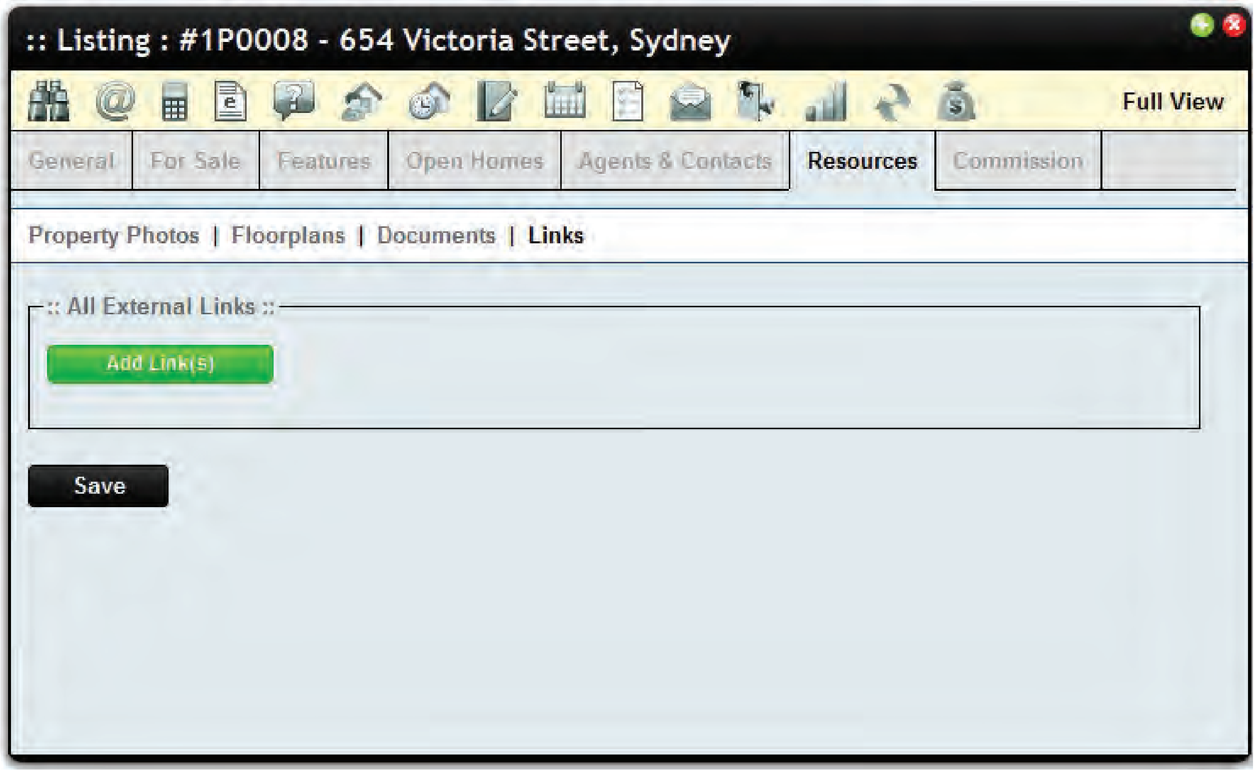
10. Click on Save

Links

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

1. Search for your Property and open the Resources Tab on the Property Card

2. Click on Links on the sub resources tab



3. Click Add Link(s)

4. Enter a Link URL, link title and select the type of link from the link type drop down.

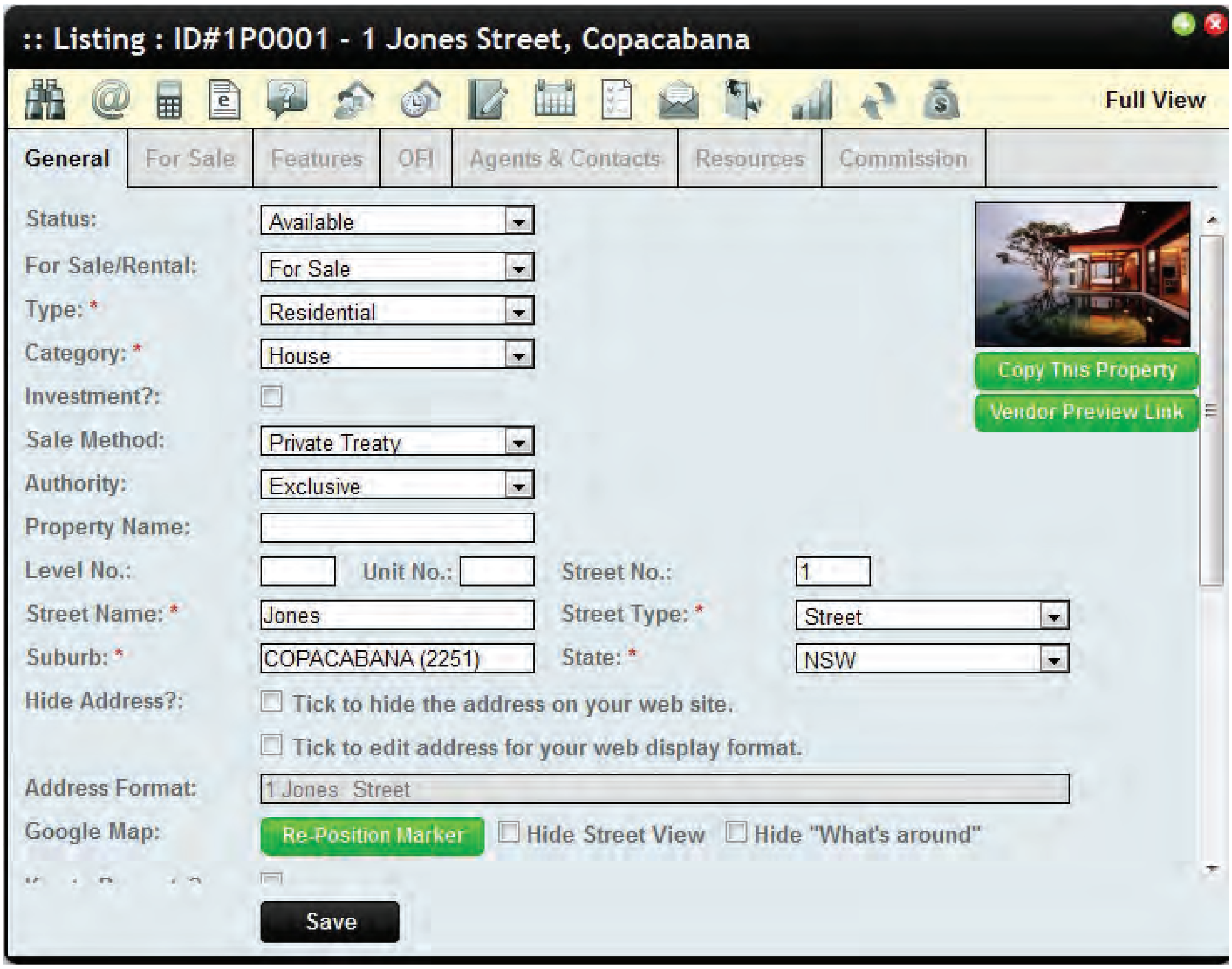
5. Click Save

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

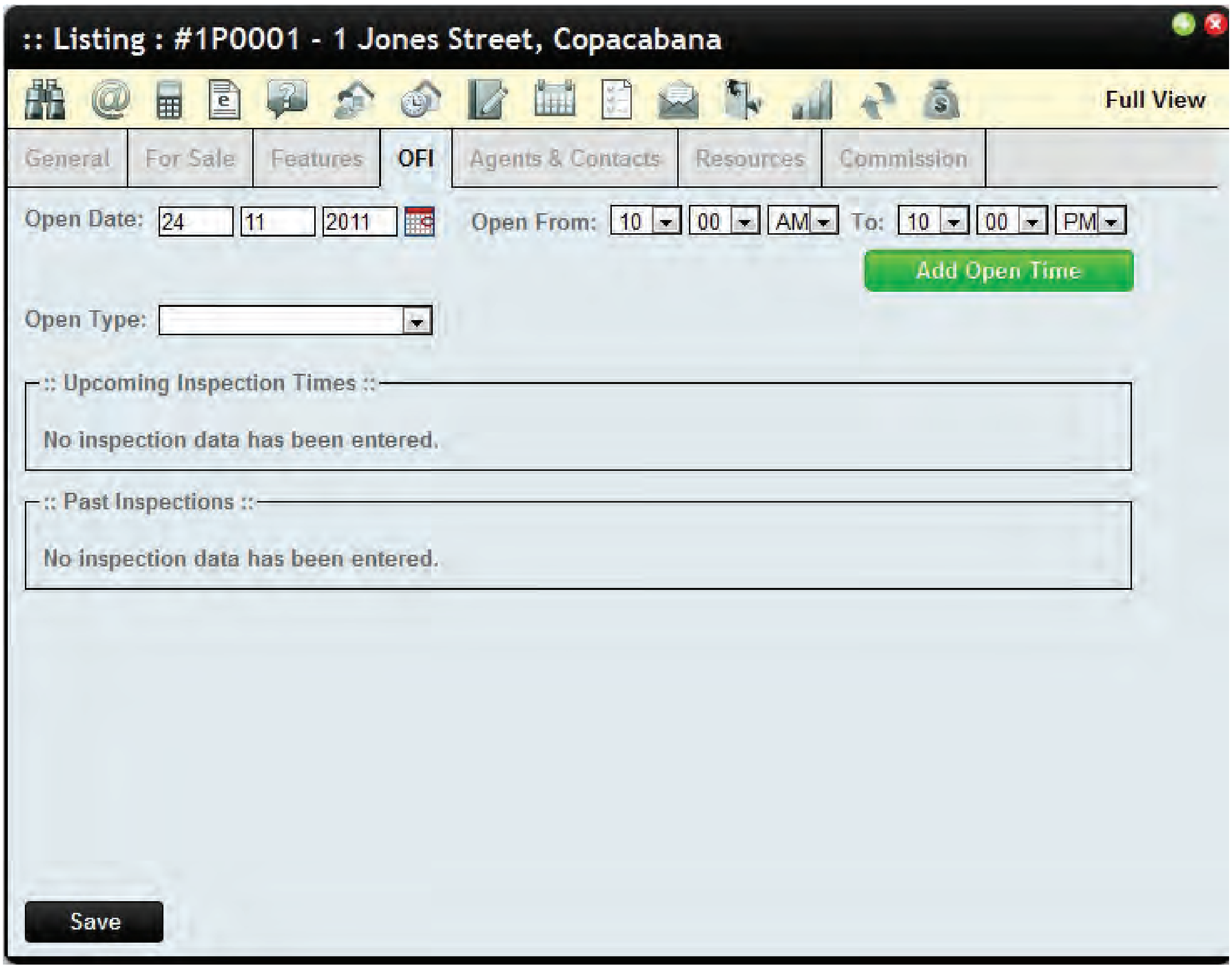
OFI

How do I add Open For Inspection times?

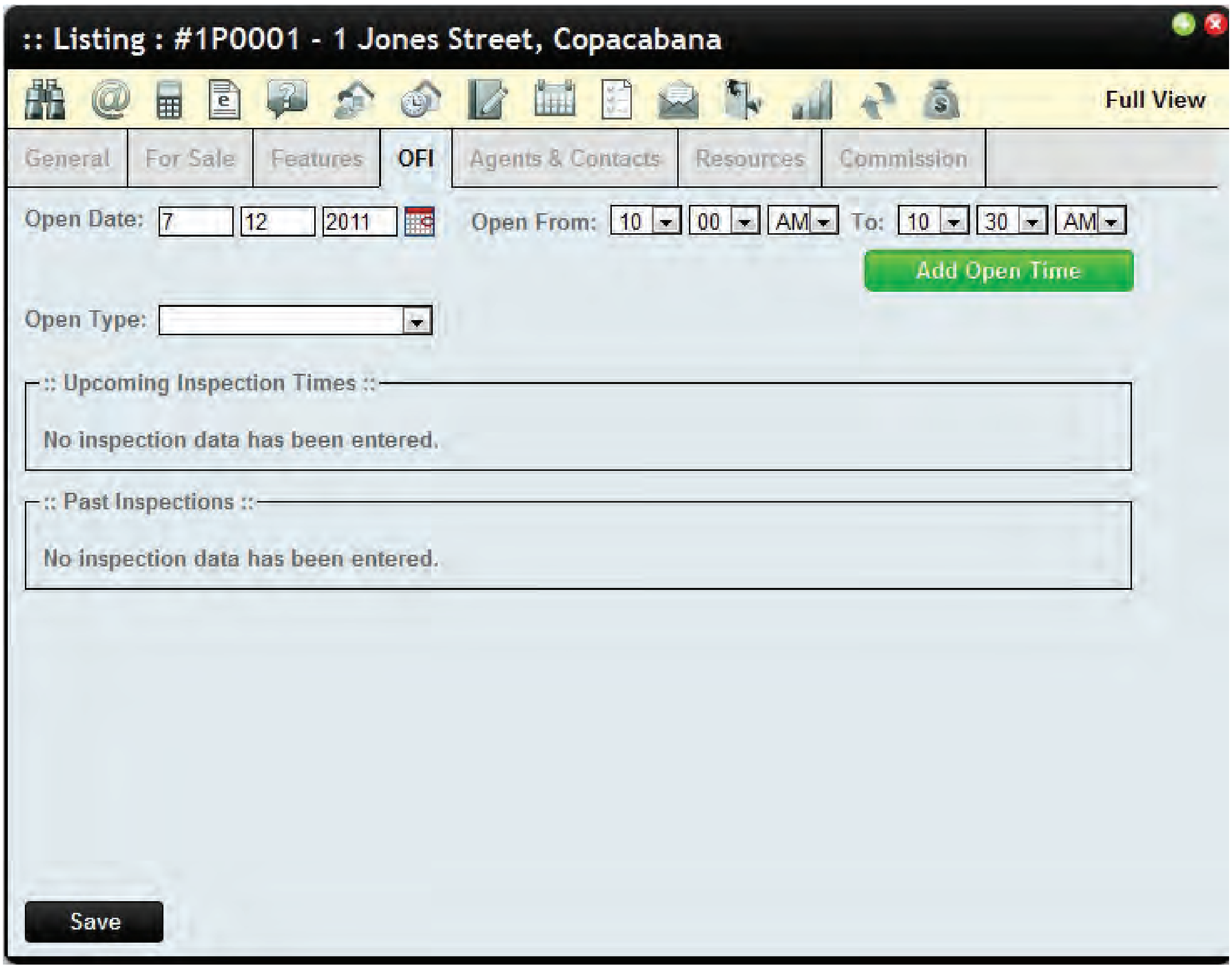
1. Search for your Property and open the Property Card



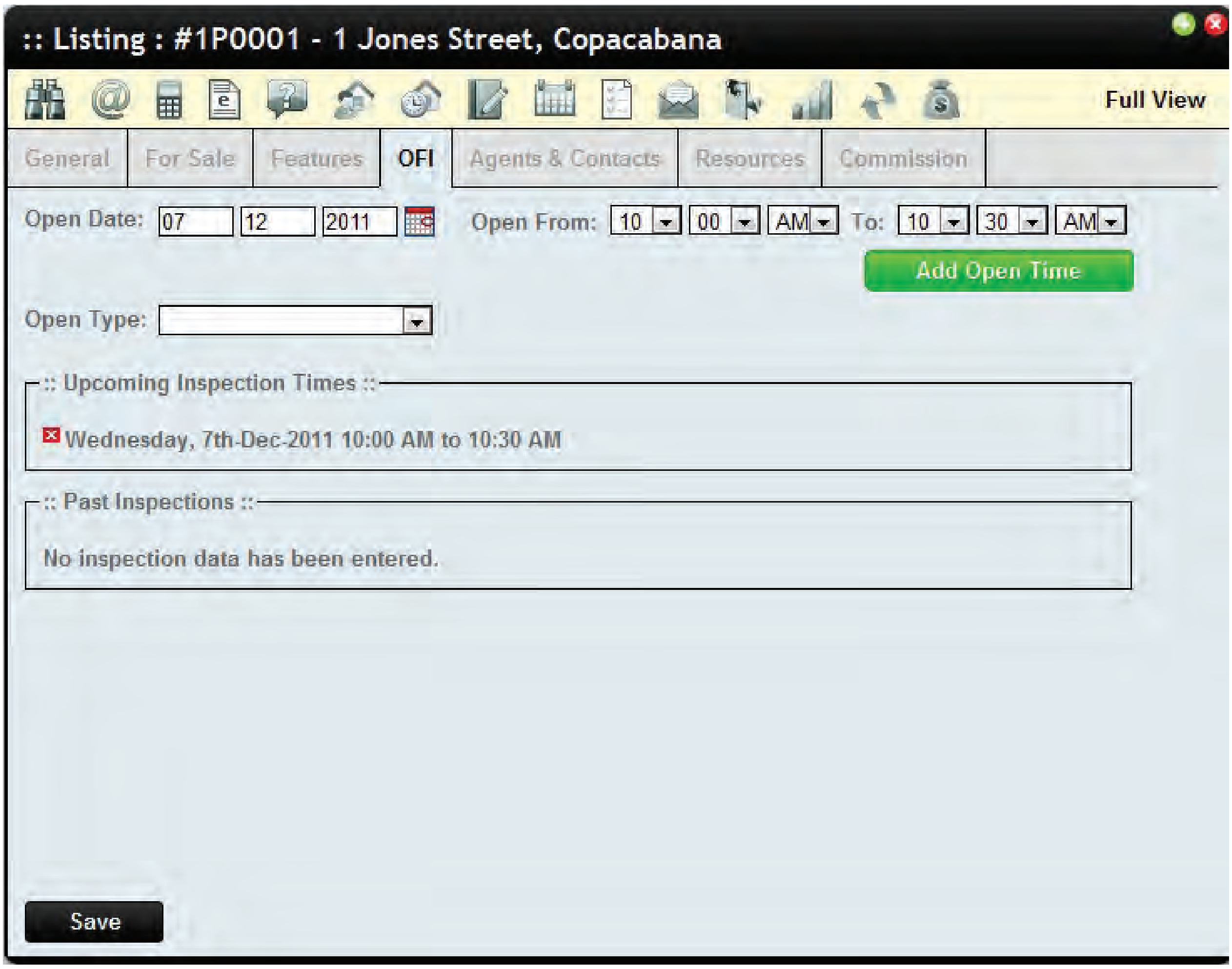
2. Click on the OFI tab



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



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



5. Click Save

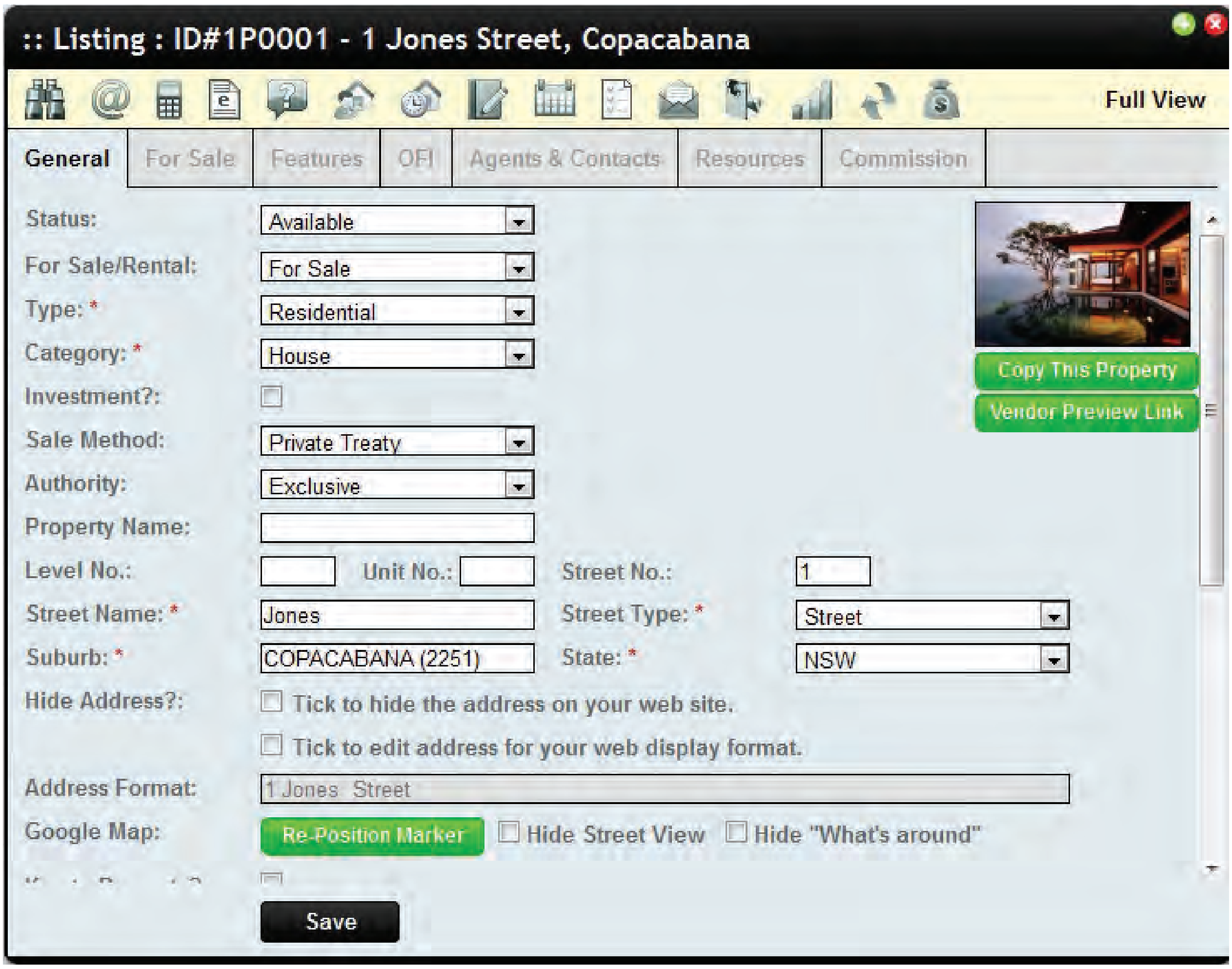
How do I edit an OFI time in Agentbox?

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.

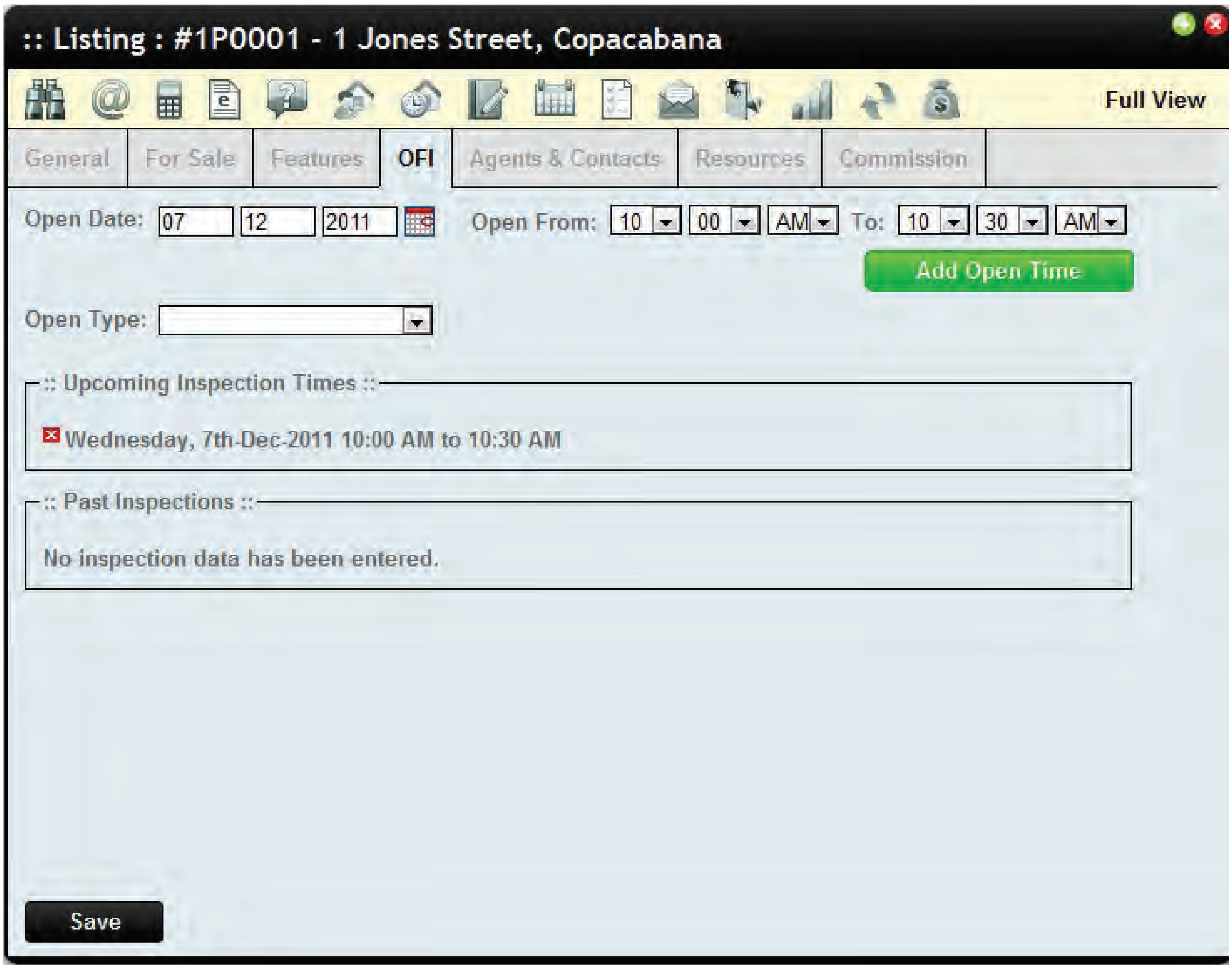
How do I delete an OFI time in Agentbox?

1. Search for your Property and open the Property Card

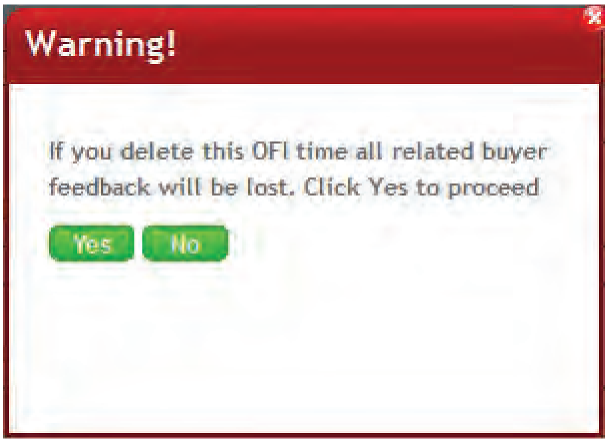


2. Click on the OFI tab

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.*



5. Click Yes



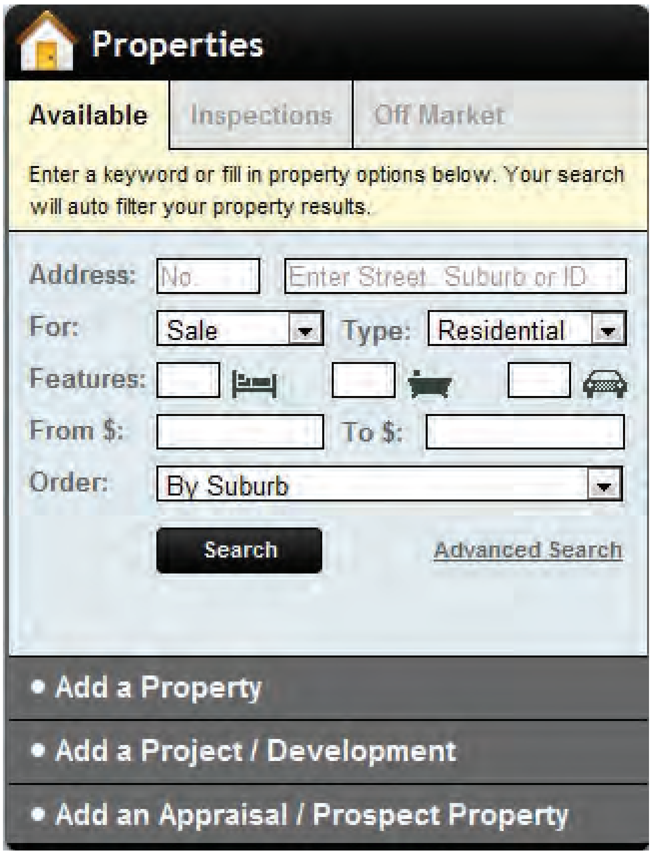
6. Click Save

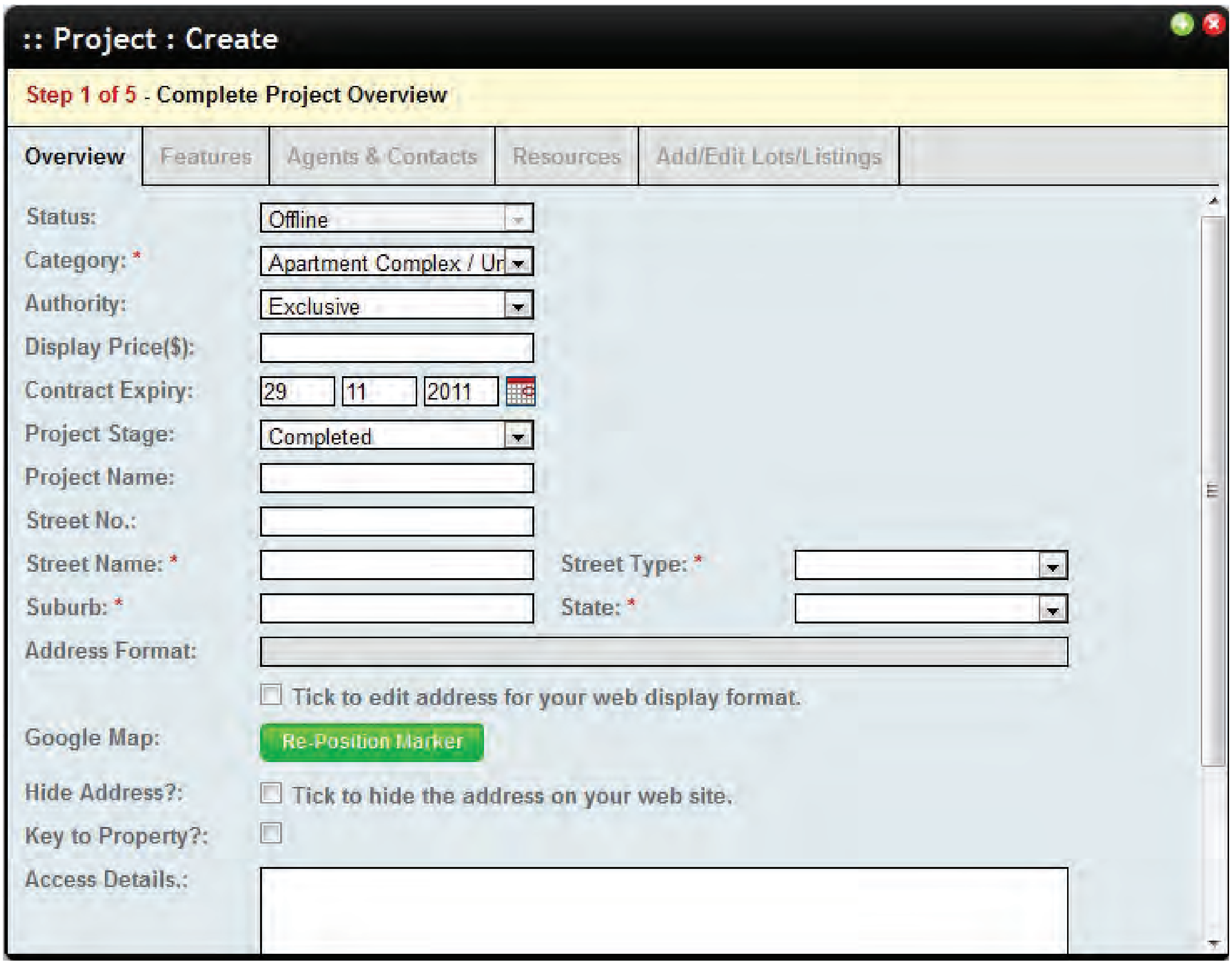
Add Project

How do I enter a Project into Agentbox?

1. Click on the Properties icon from the Main Menu

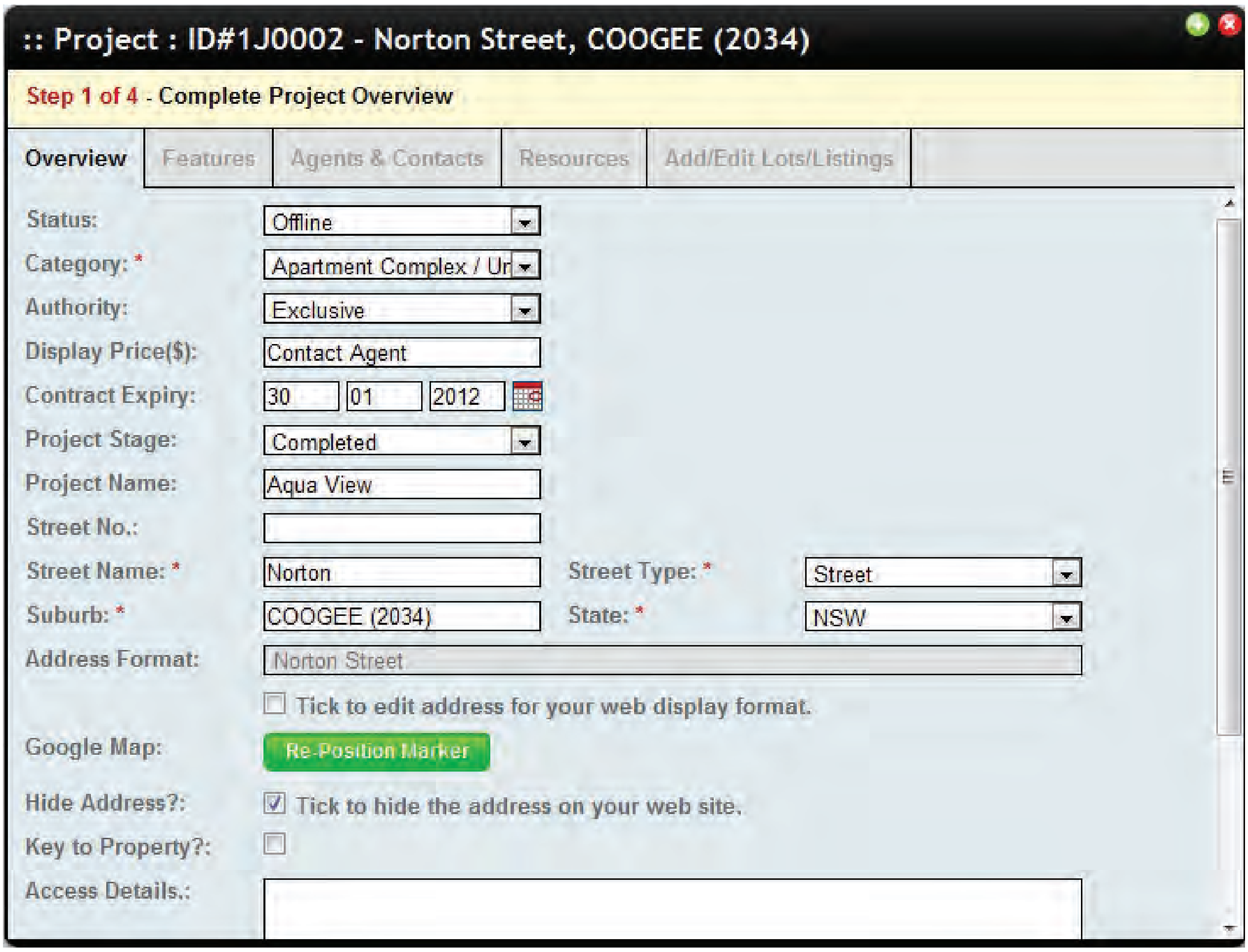
2. Click on Add a Project/Development from the Property Panel





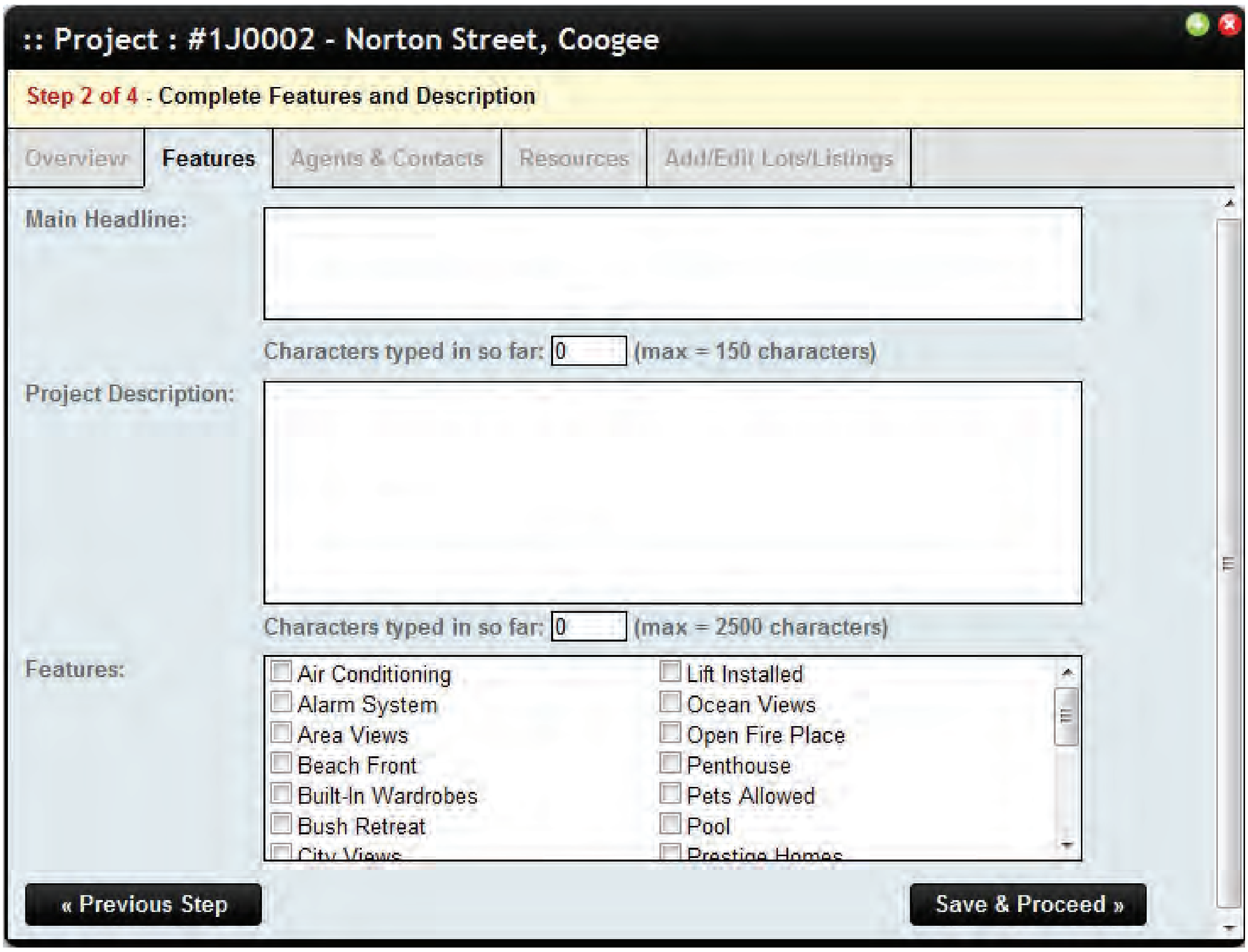
3. Enter Property Information:

* 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



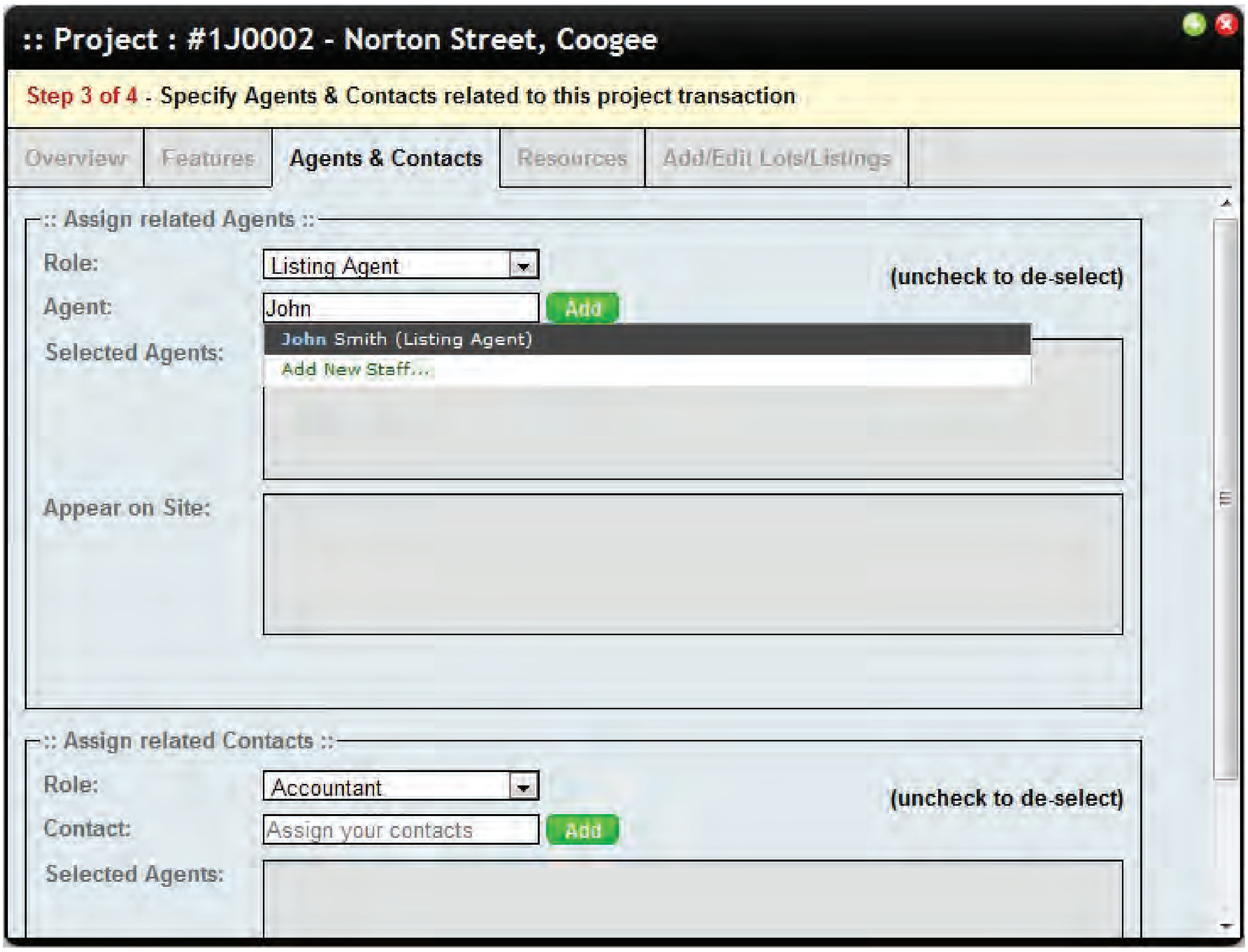
4. Click on Save & Proceed

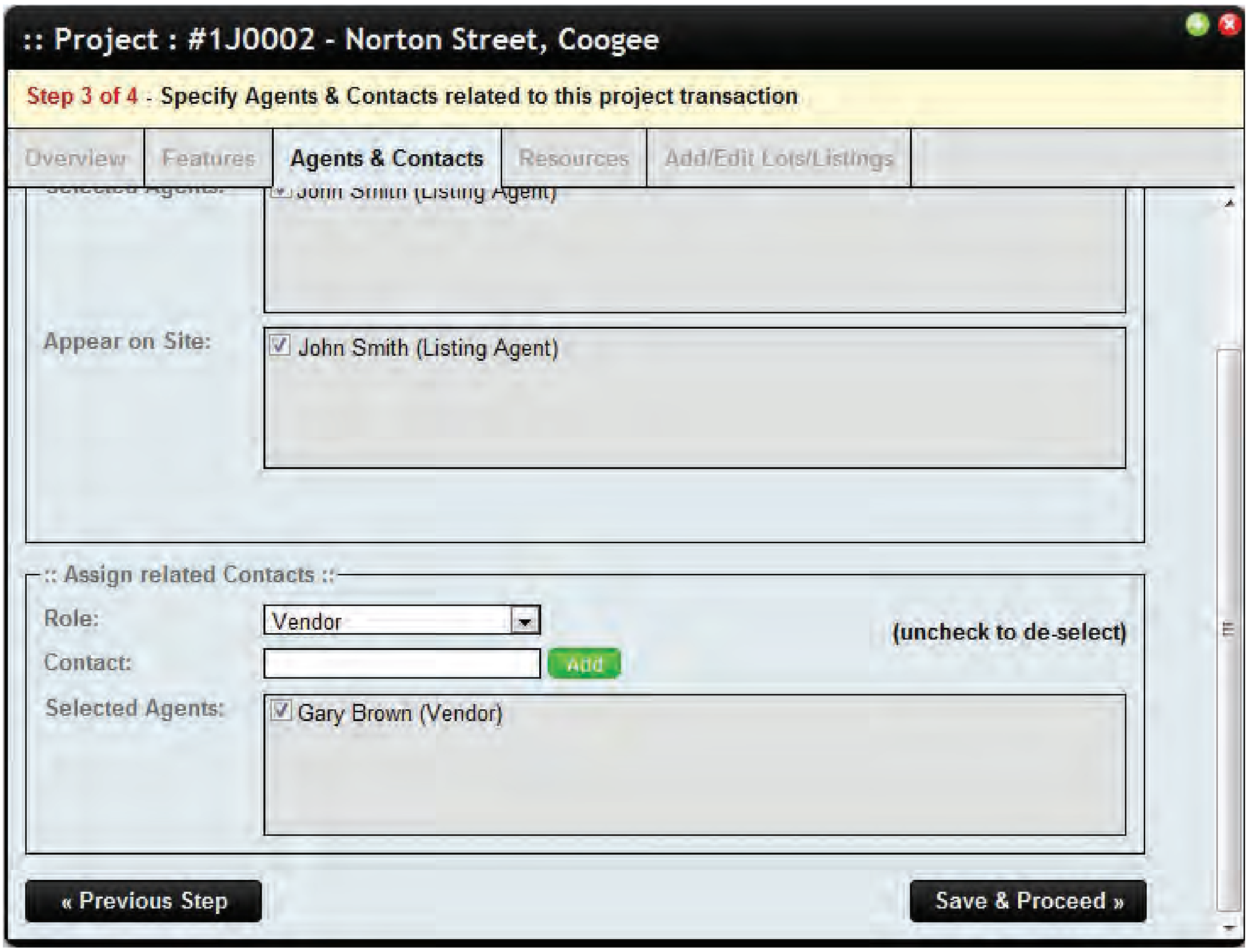
5. Enter Features of the Project: Main Headline, Project Description and Features of the Project



6. Click on Save & Proceed

7. Add related Agents & Contacts


:: Project : #1J0002 - Norton Street, Coogee
Step 3 of 4 - Specify Agents & Contacts related to this project transaction
Overview
Features
Agents & Contacts
Resources
Add/Edit Lots/Listings
:: Assign related Agents ::
Role:
Listing Agent
(uncheck to de-select)
Agent:
John
Add
John Smith (Listing Agent)
Add New Staff...
Selected Agents:
Appear on Site:
:: Assign related Contacts ::
Role:
Accountant
(uncheck to de-select)
Contact:
Assign your contacts
Add
Selected Agents:



8. Click on Save & Proceed

9. Upload Project photos and Documents under the Resources tab

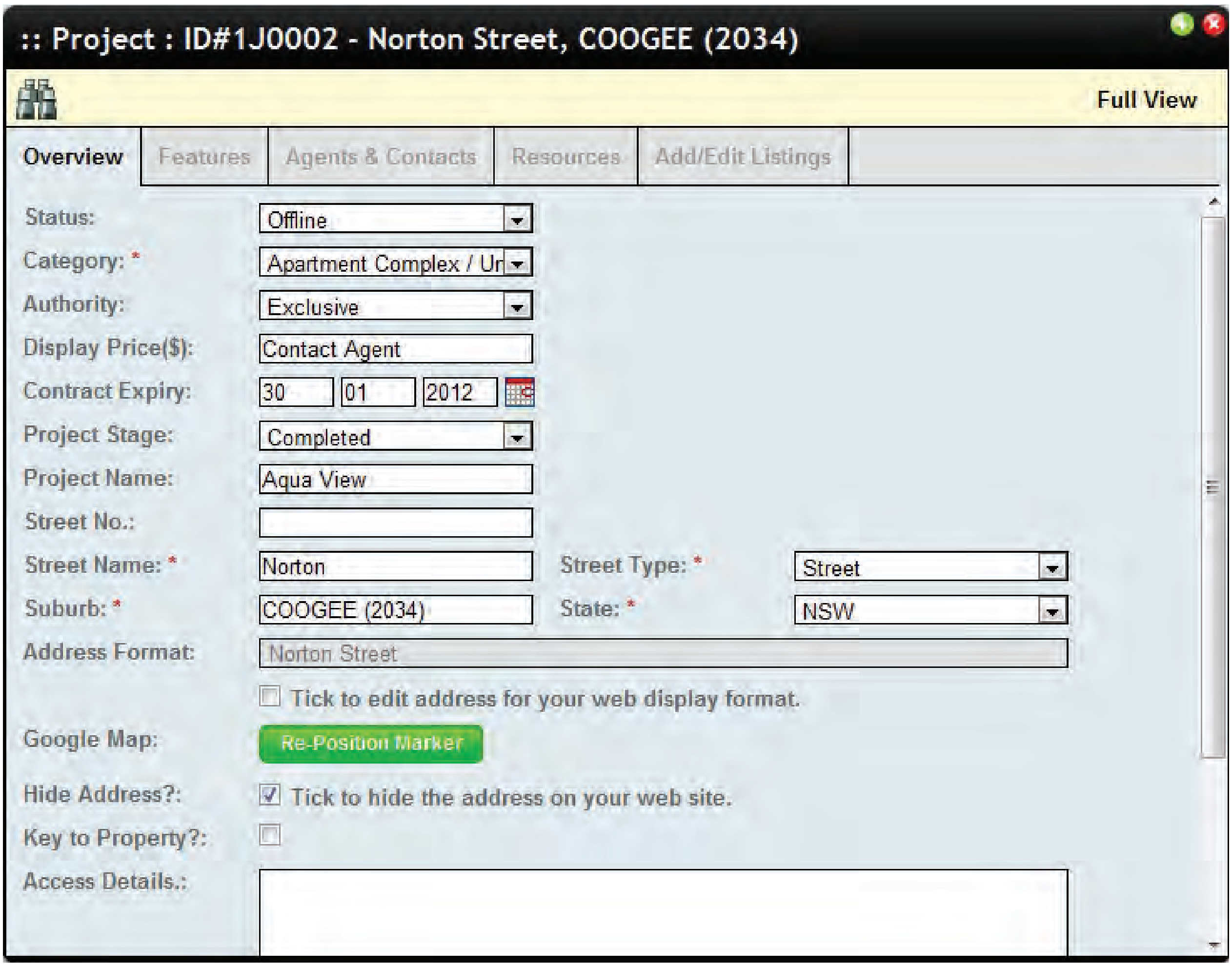
**Note: Your Agency Agreement and Sustainability Declaration must be uploaded into Agentbox before your property can be displayed live on the web in QLD*
Your Agency Agreement and Contract for Sale must be uploaded into Agentbox before your property can be displayed live on the web in NSW and VIC.

10. Click Save

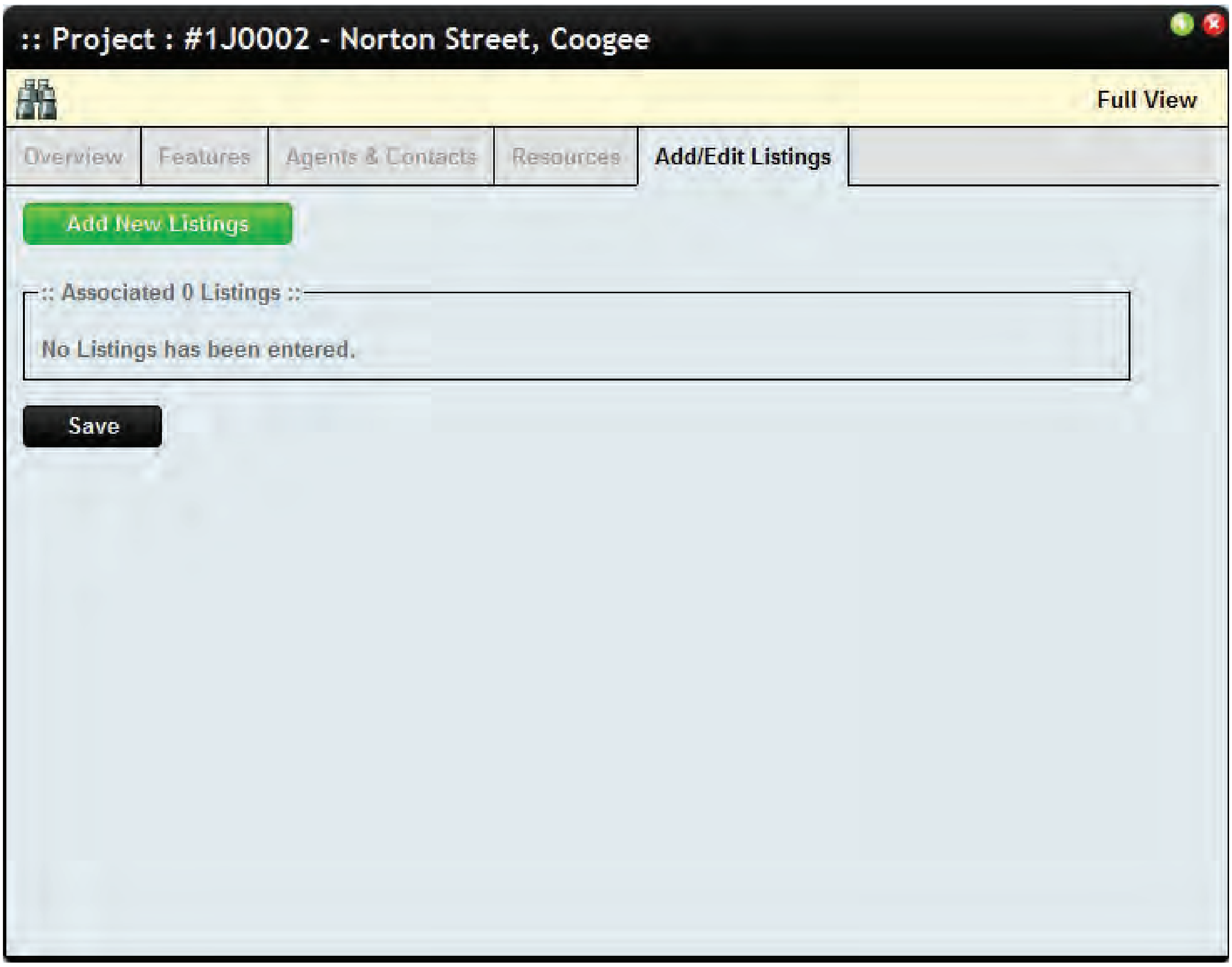
Add Properties to a Project

How do I add a Property to a Project?

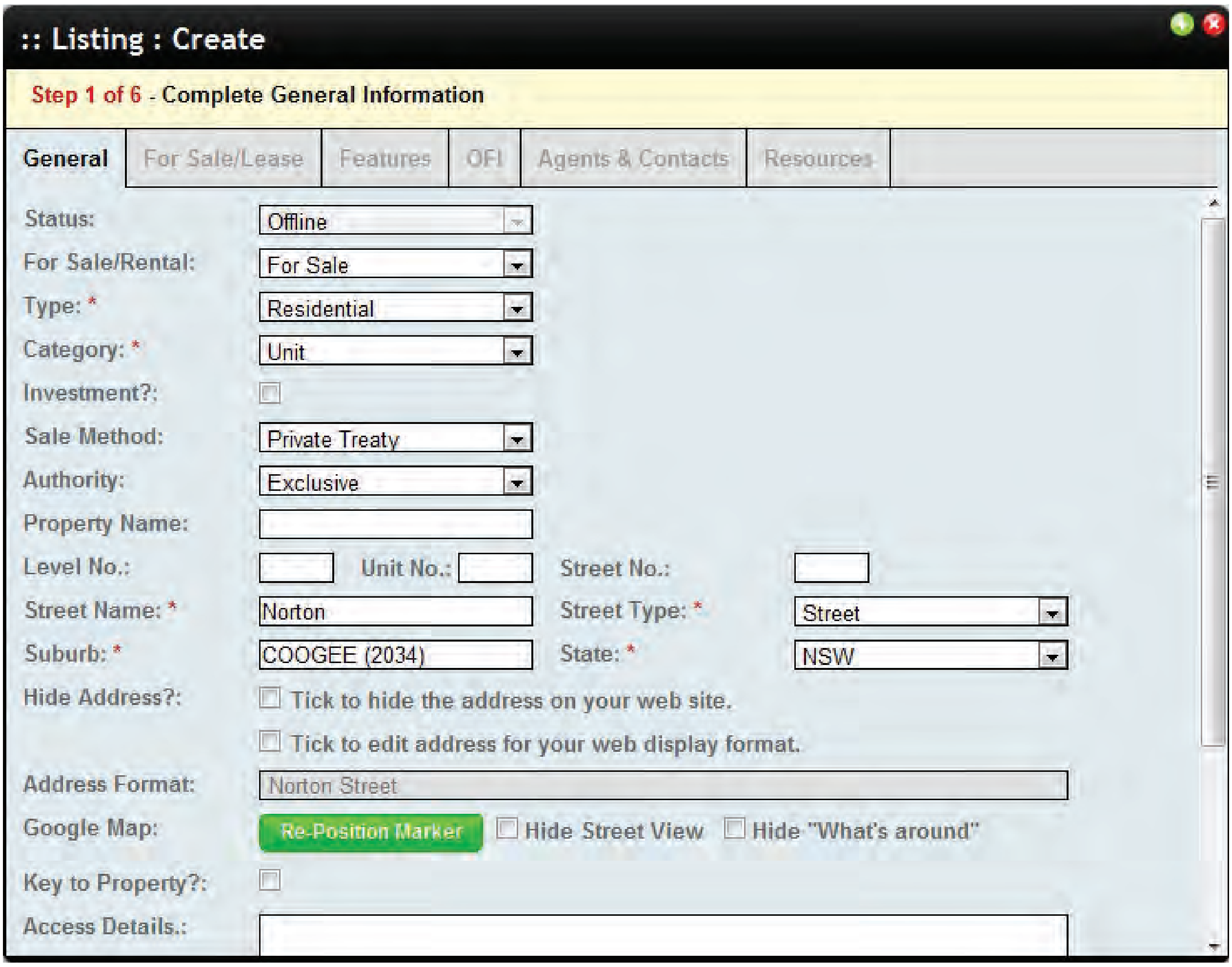
1. Search for your Project and open the Project card.



2. Click on the Add/Edit Listings tab

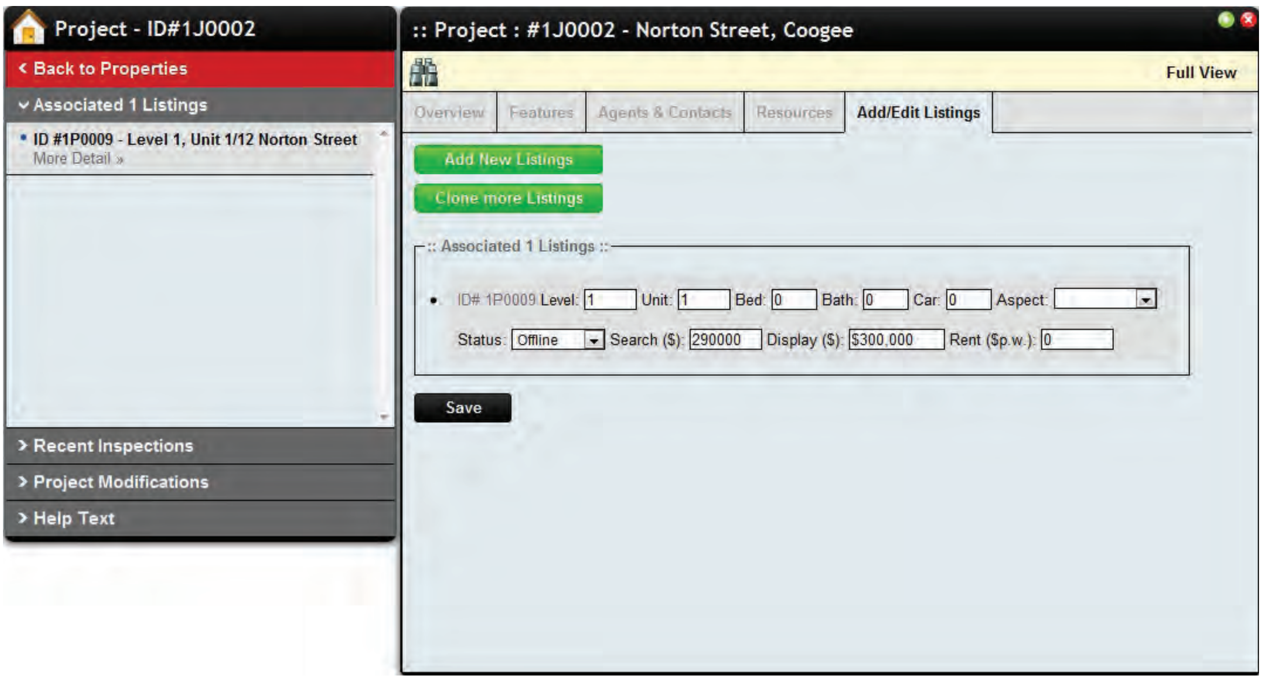


3. Click on Add New Listing



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

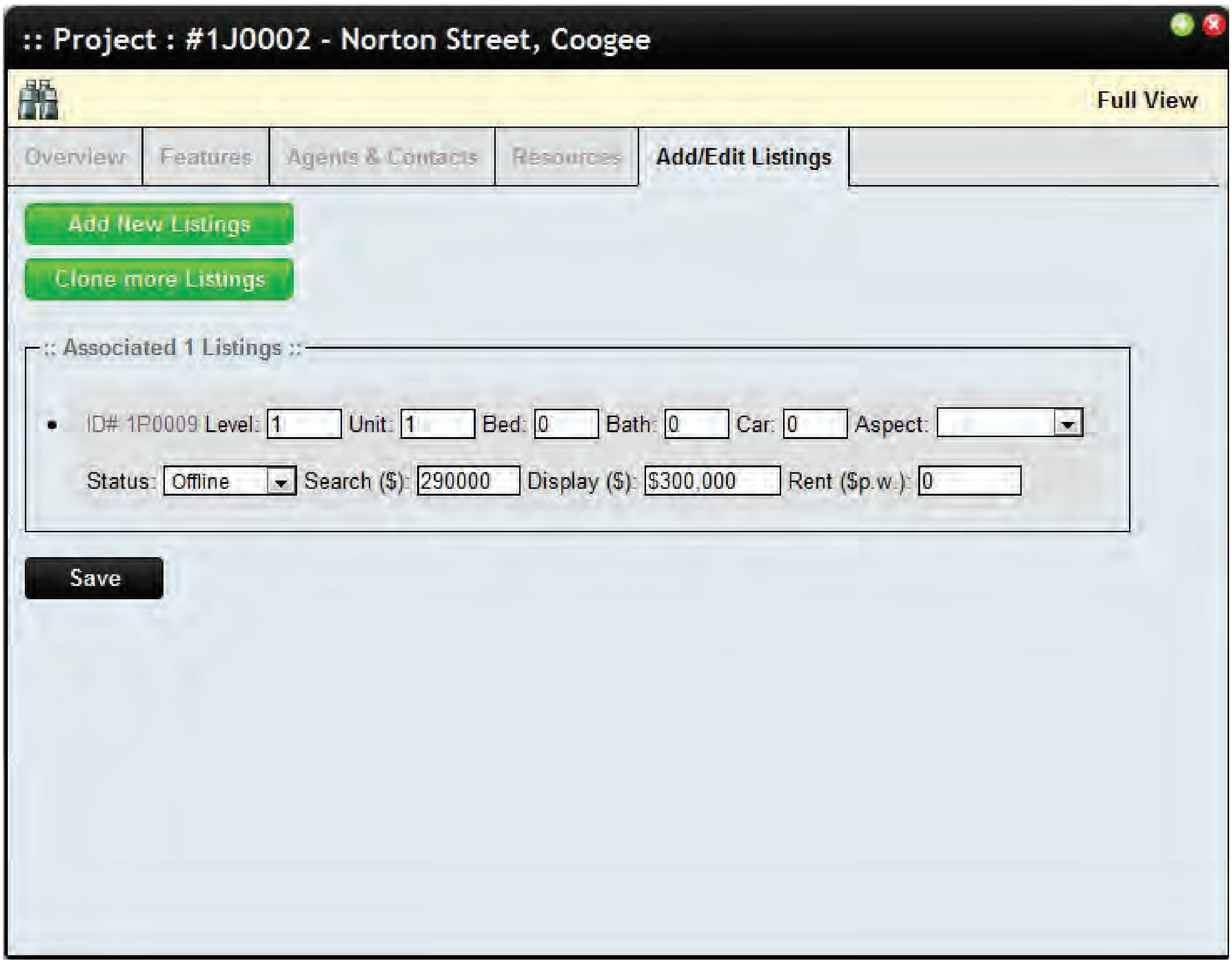
5. Once you have completed these tabs, the property will be added to the project list.



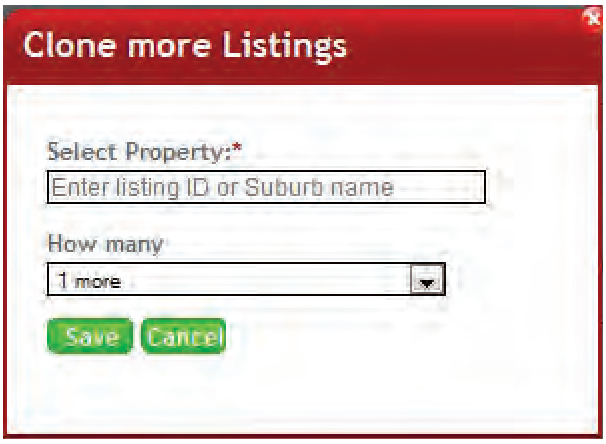
How do I Duplicate Properties to a Project in Agentbox?

1. Search for your Project and open the project card

2. Click on Add/ Edit Listings

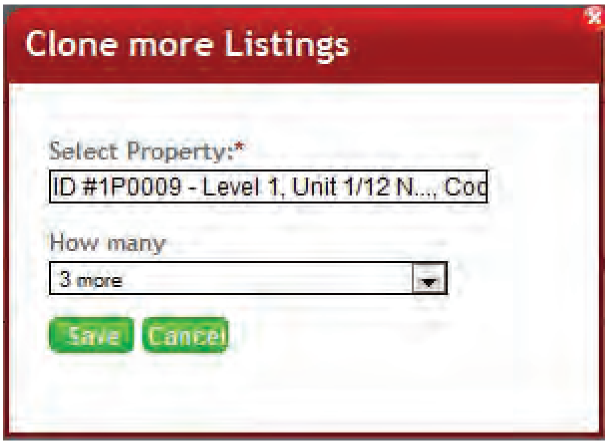


3. Click on Clone More Listings

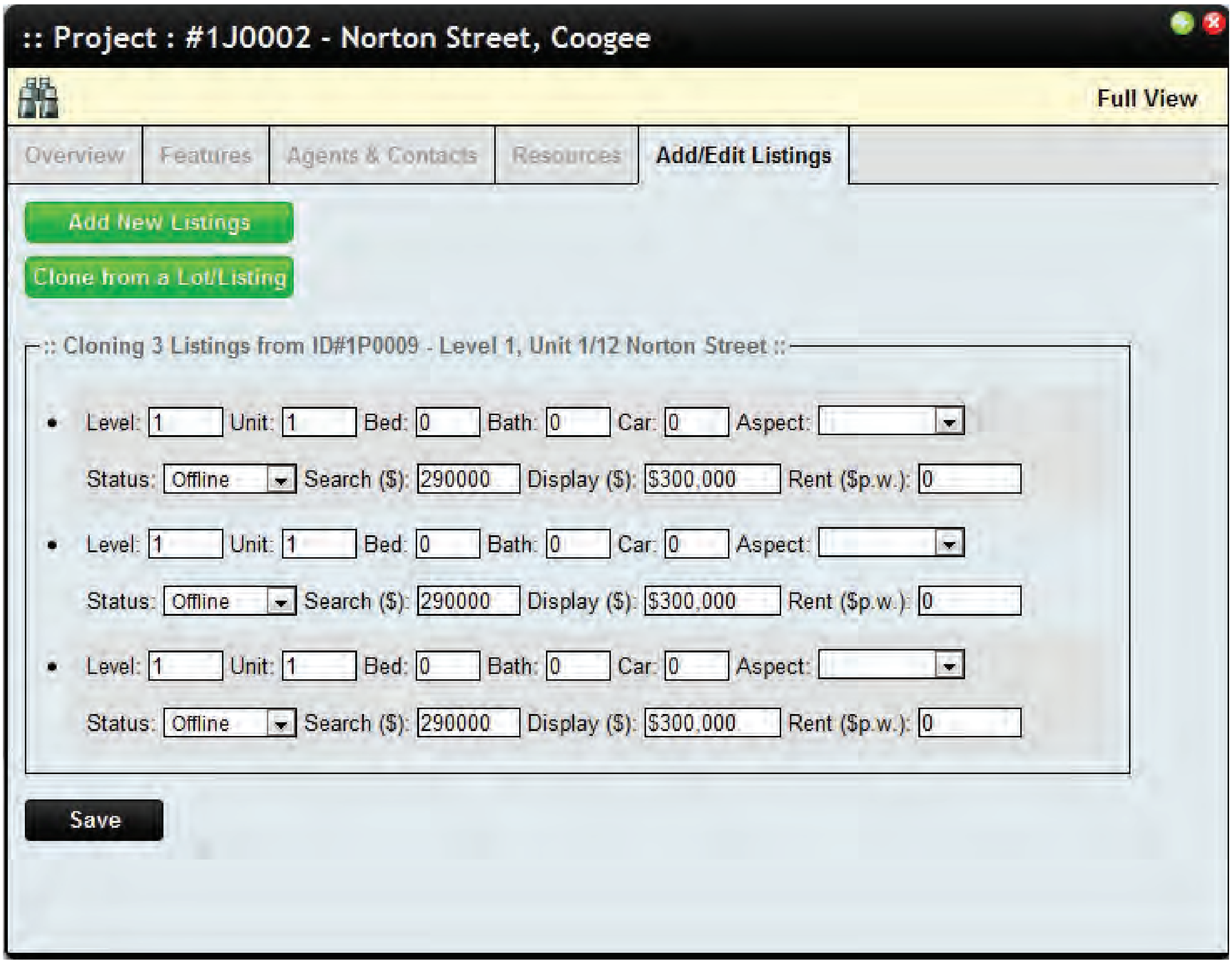


4. Select Property to Clone

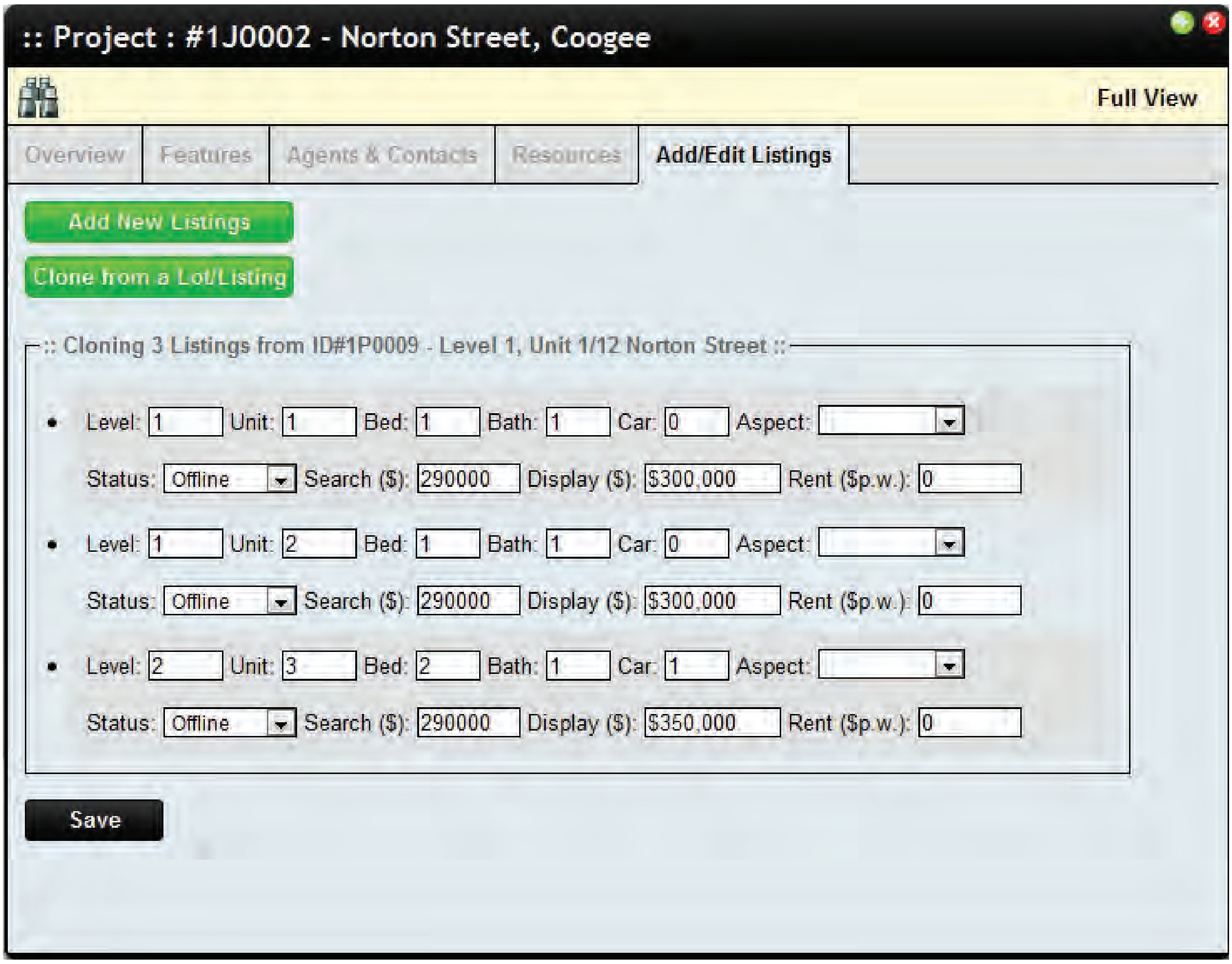
5. Select Number of Properties to clone



6. Click on Save

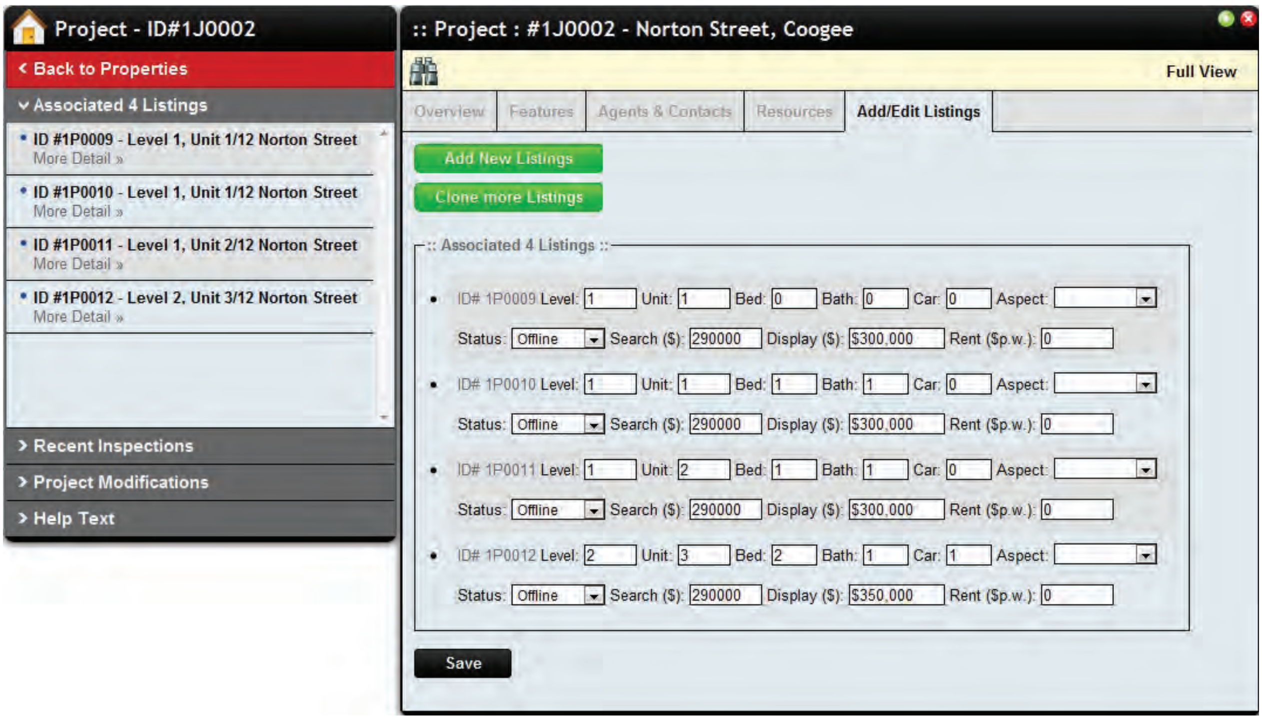


7. Enter alterations for new property, e.g Unit number



8. Click on Save

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



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

Search for Property

How can I search for my Property?

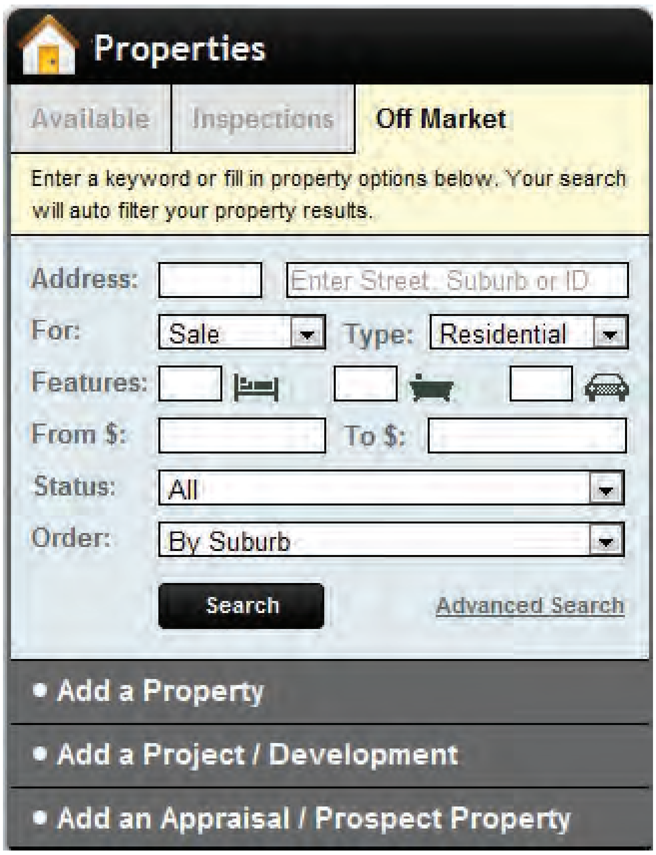
There are three ways in which to search for a property:

- Through the Left Panel Fast Find
- Through the Universal Search Bar
- Through an Advanced Property Search

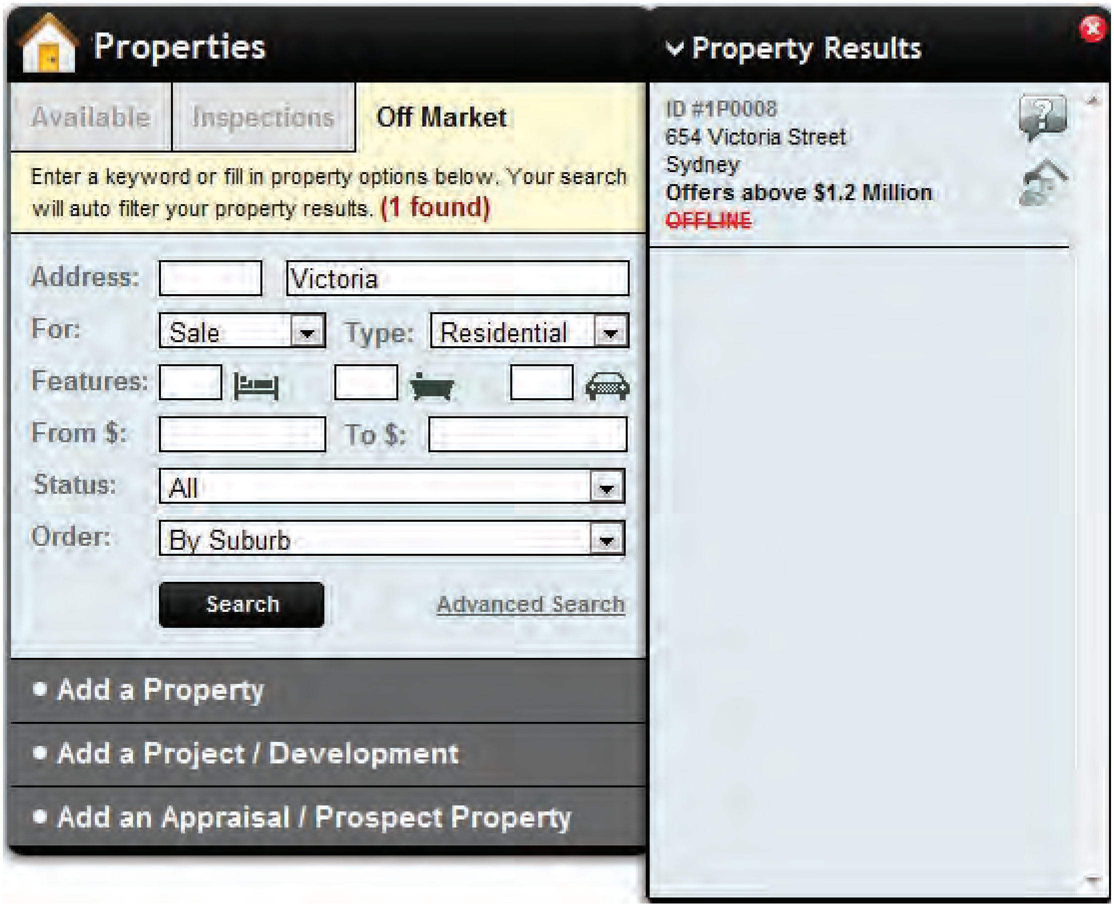
Left Panel Fast Find

1. Click on the Properties Icon from the main menu

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

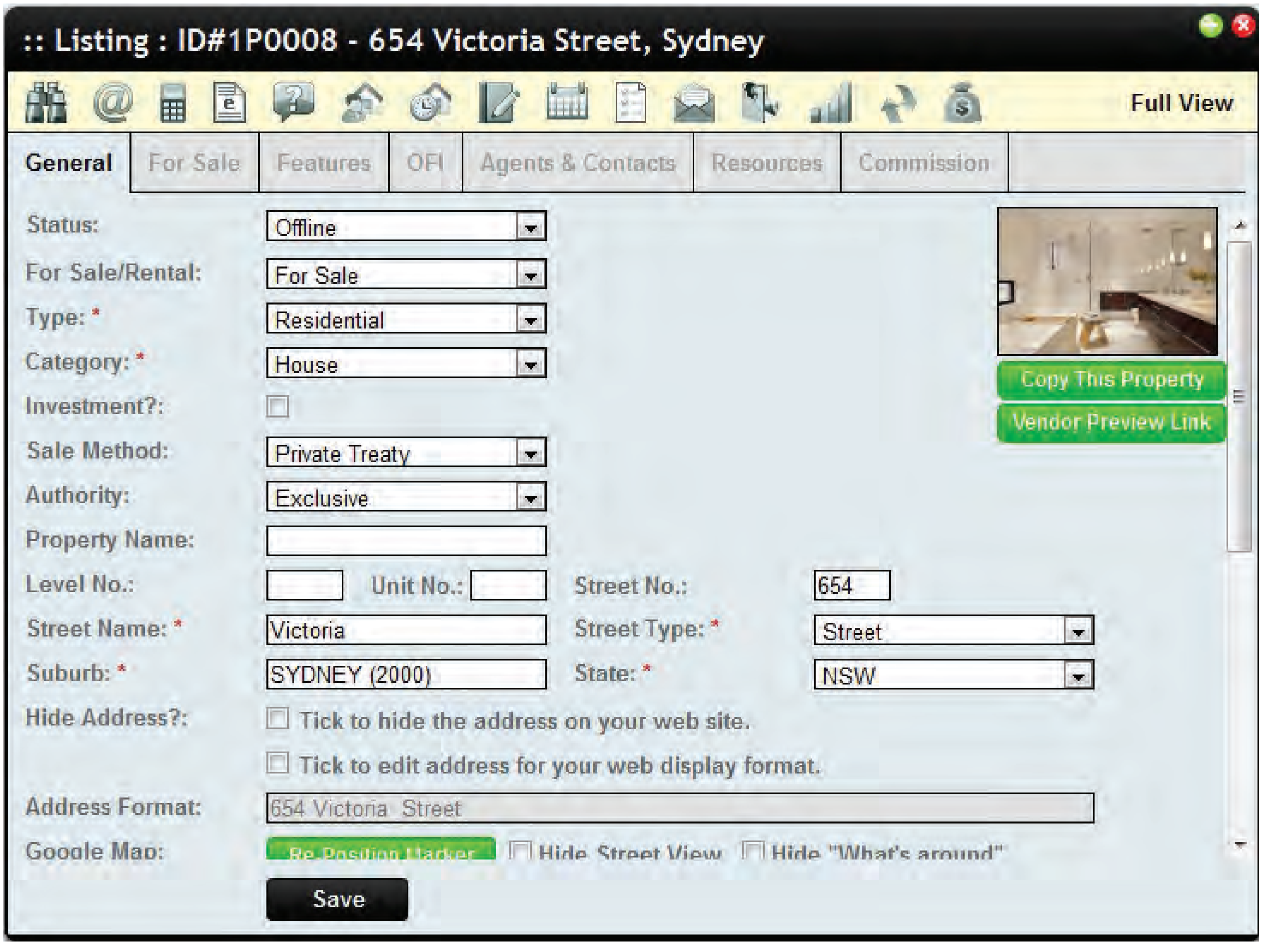


3. Enter a Keyword in the Left Panel Search



4. Click on your Property from the Property Results List

5. Property Card will appear on screen

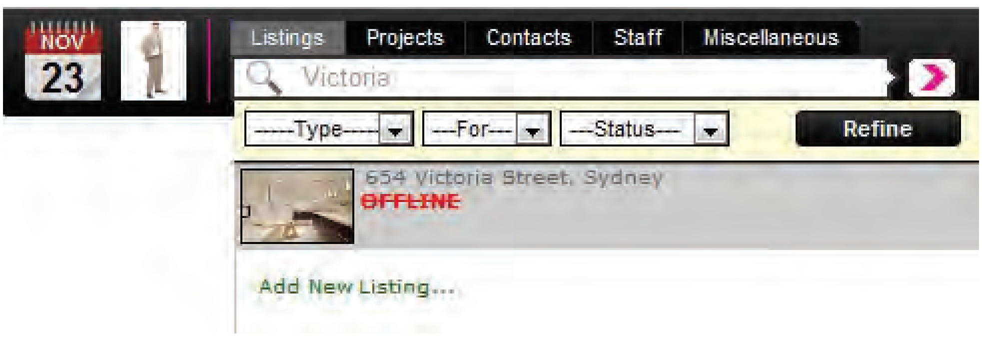


Universal Search Bar

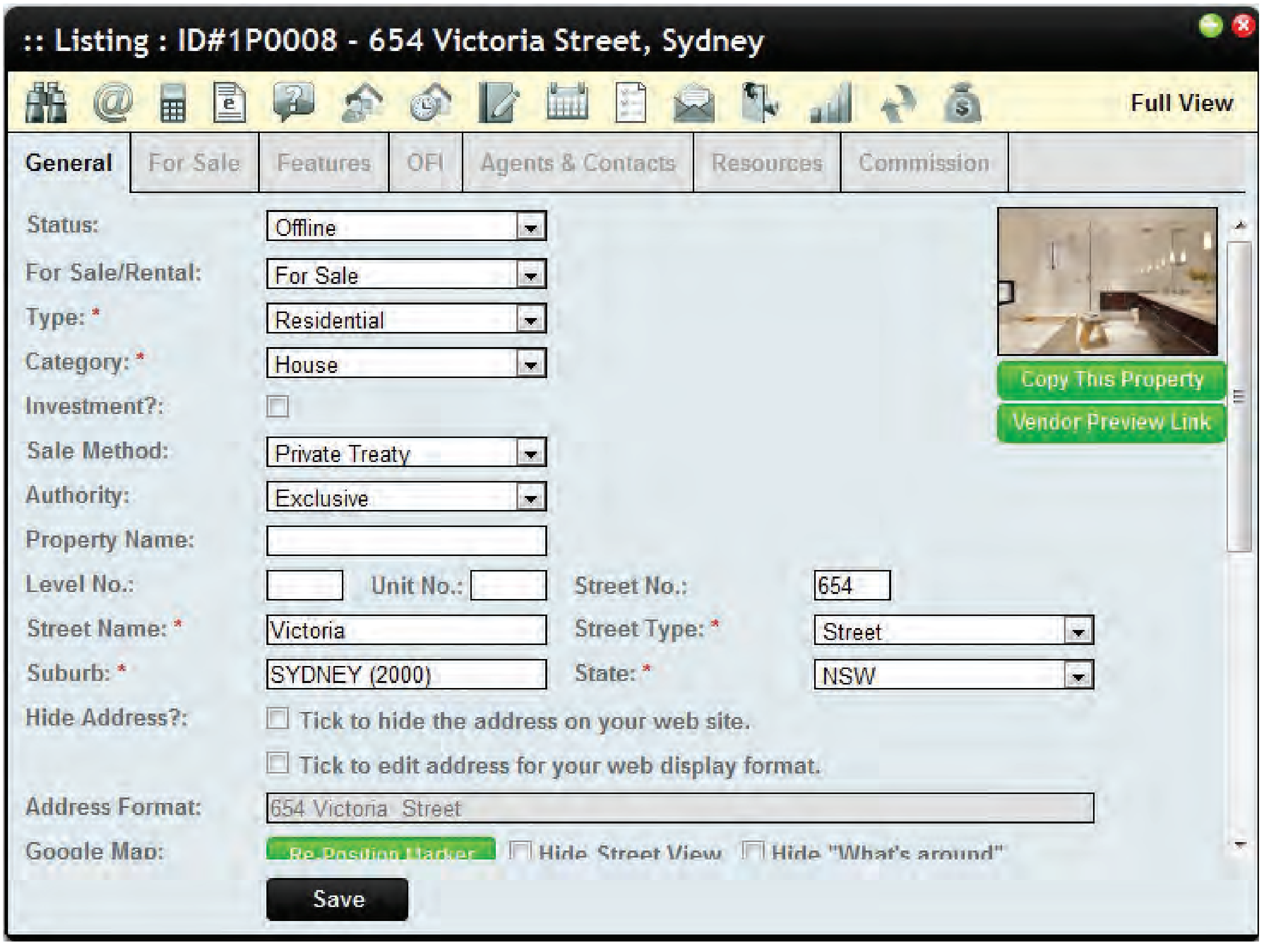
1. Click on Listings from the Universal Search Bar at the top of the screen

2. Enter Listing ID, Street Number, Name or Suburb Name

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



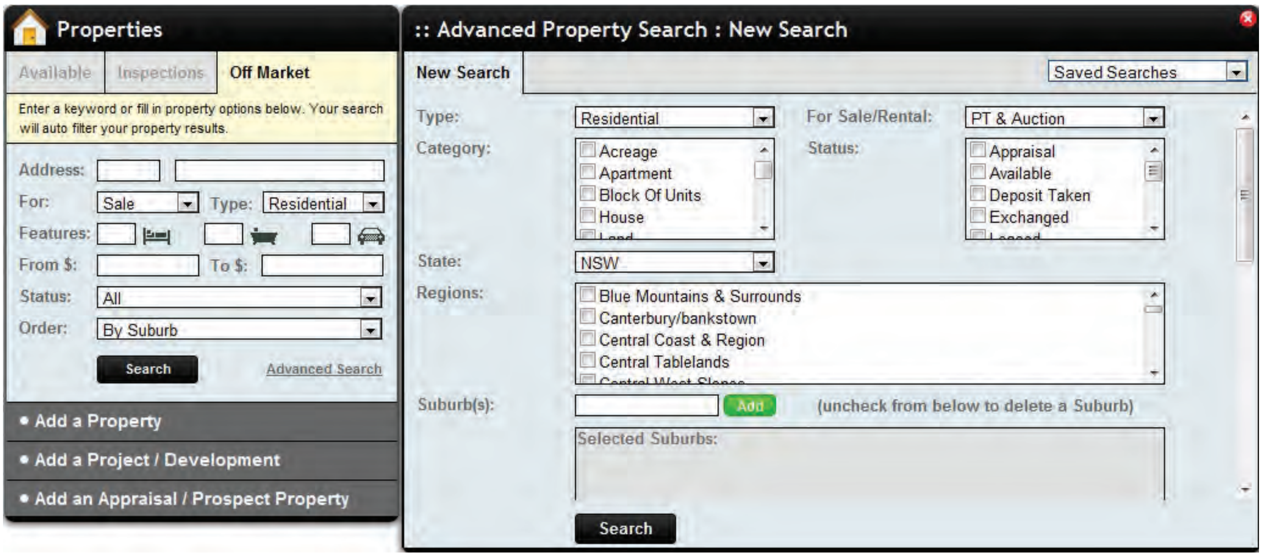
4. Click on the Property Photo, address or the Search arrow  to open the property card



Advanced Property Search

1. Click on the Properties icon from the Main Menu

2. Click on Advanced Search on the Left Panel



3. For further instructions please follow the steps under the Advanced Property Search topic.

Search for Projects

How do I search for Projects in Agentbox?

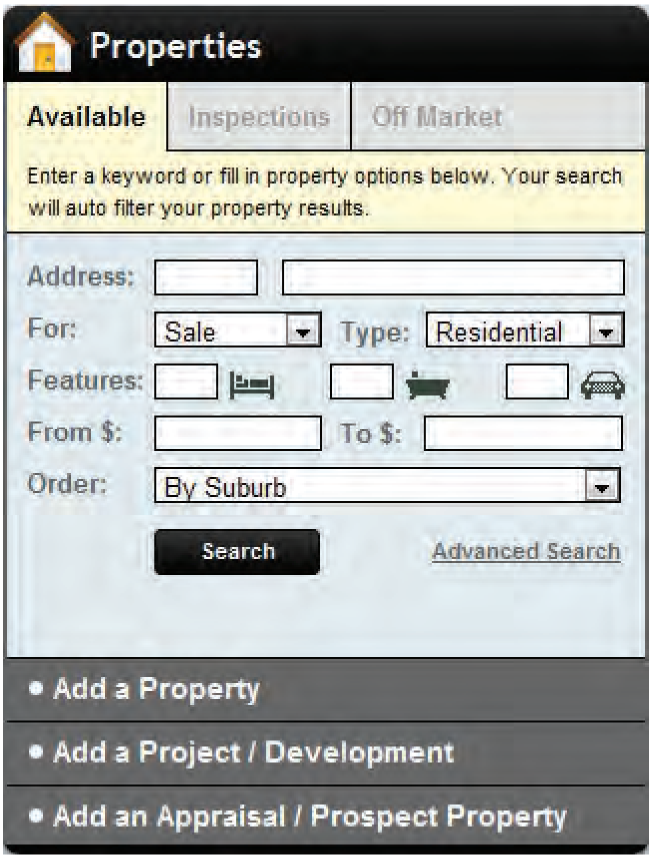
There are three ways in which to search for a Project:

- Through the Left Panel Fast Find
- Through the Universal Search Bar
- Through an Advanced Property Search

Left Panel Fast Find

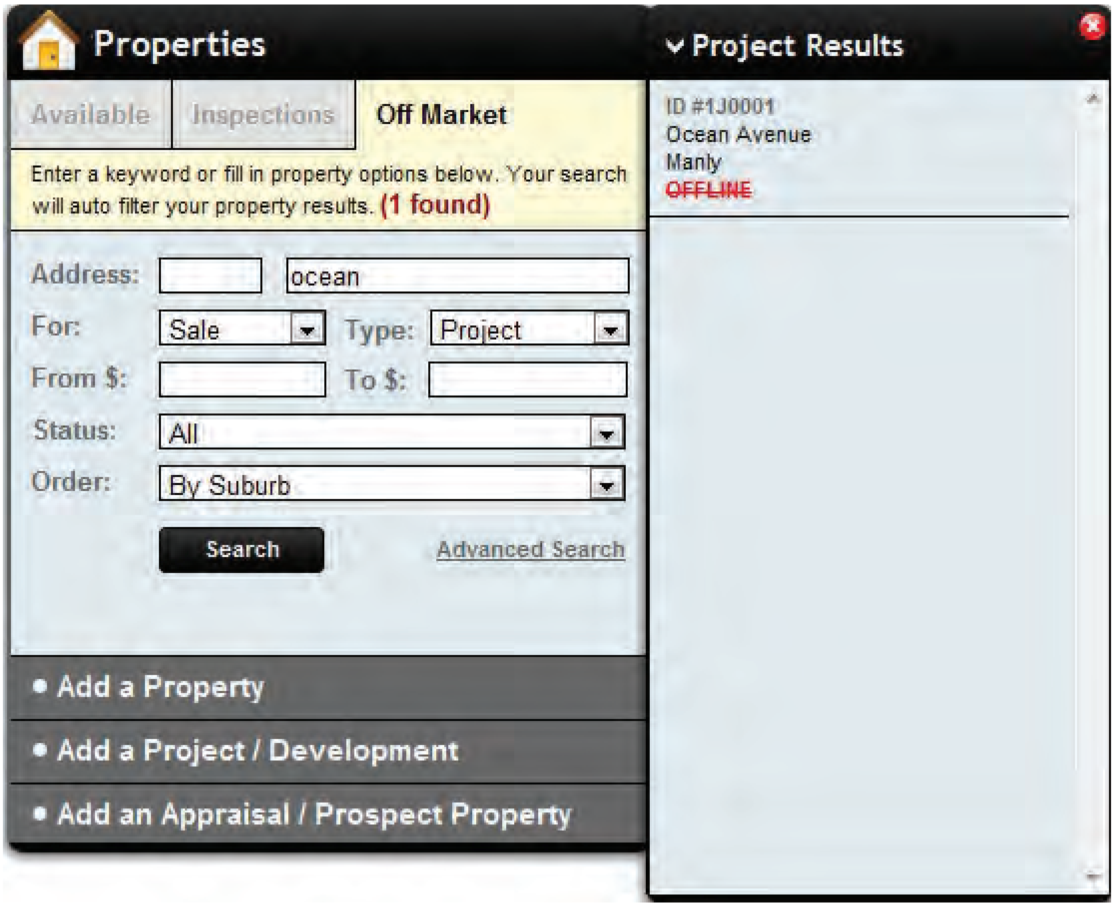
1. Click on the Properties icon from the main menu

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



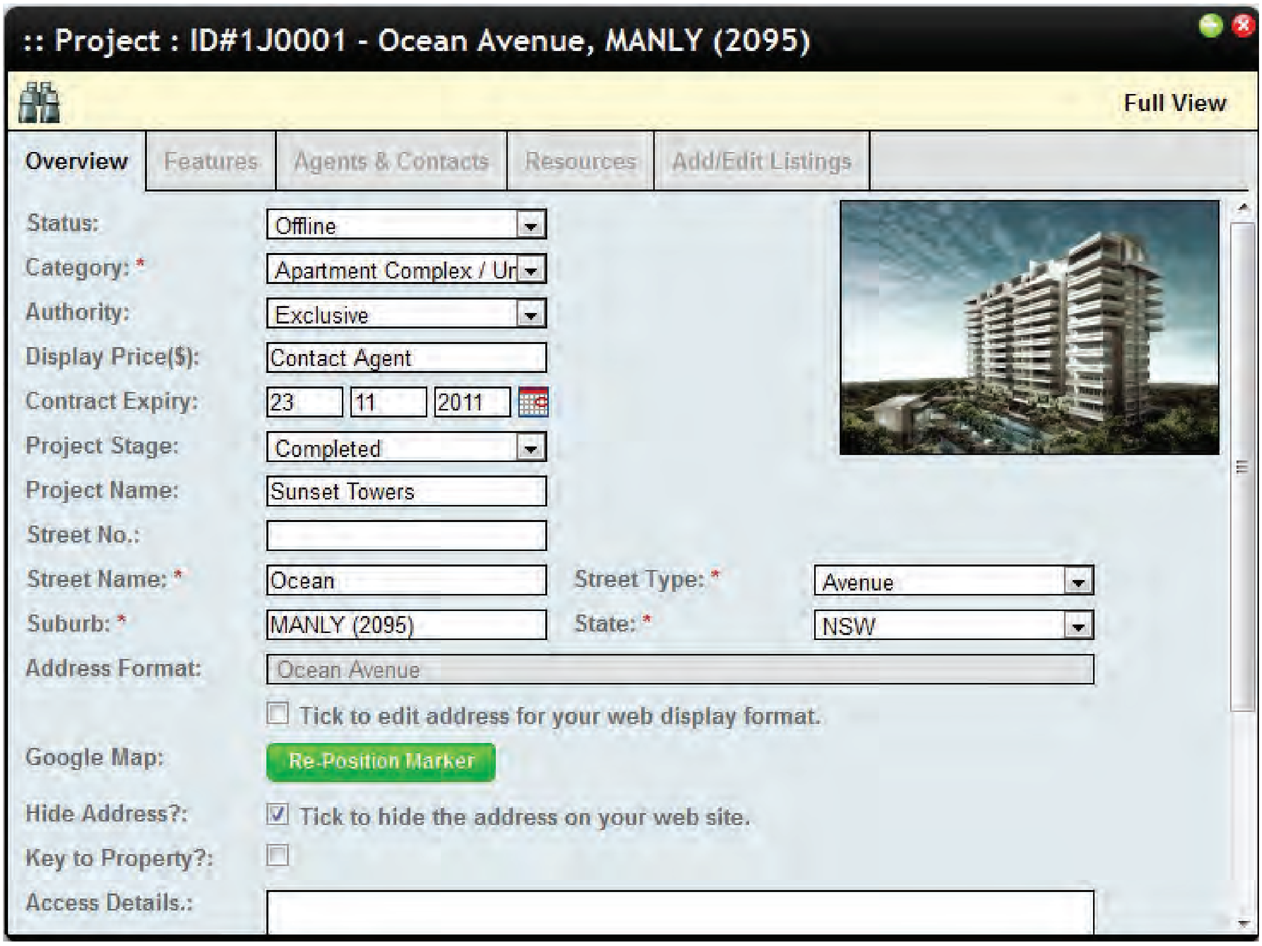
3. Click on the Type drop down and select Project

4. Click on Search



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

7. Your Project will appear on screen

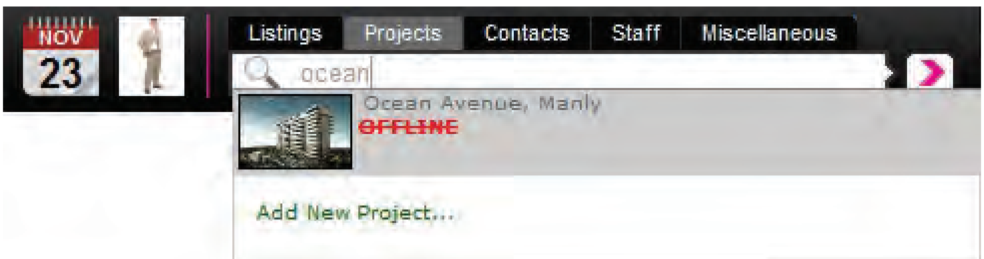


Universal Search Bar

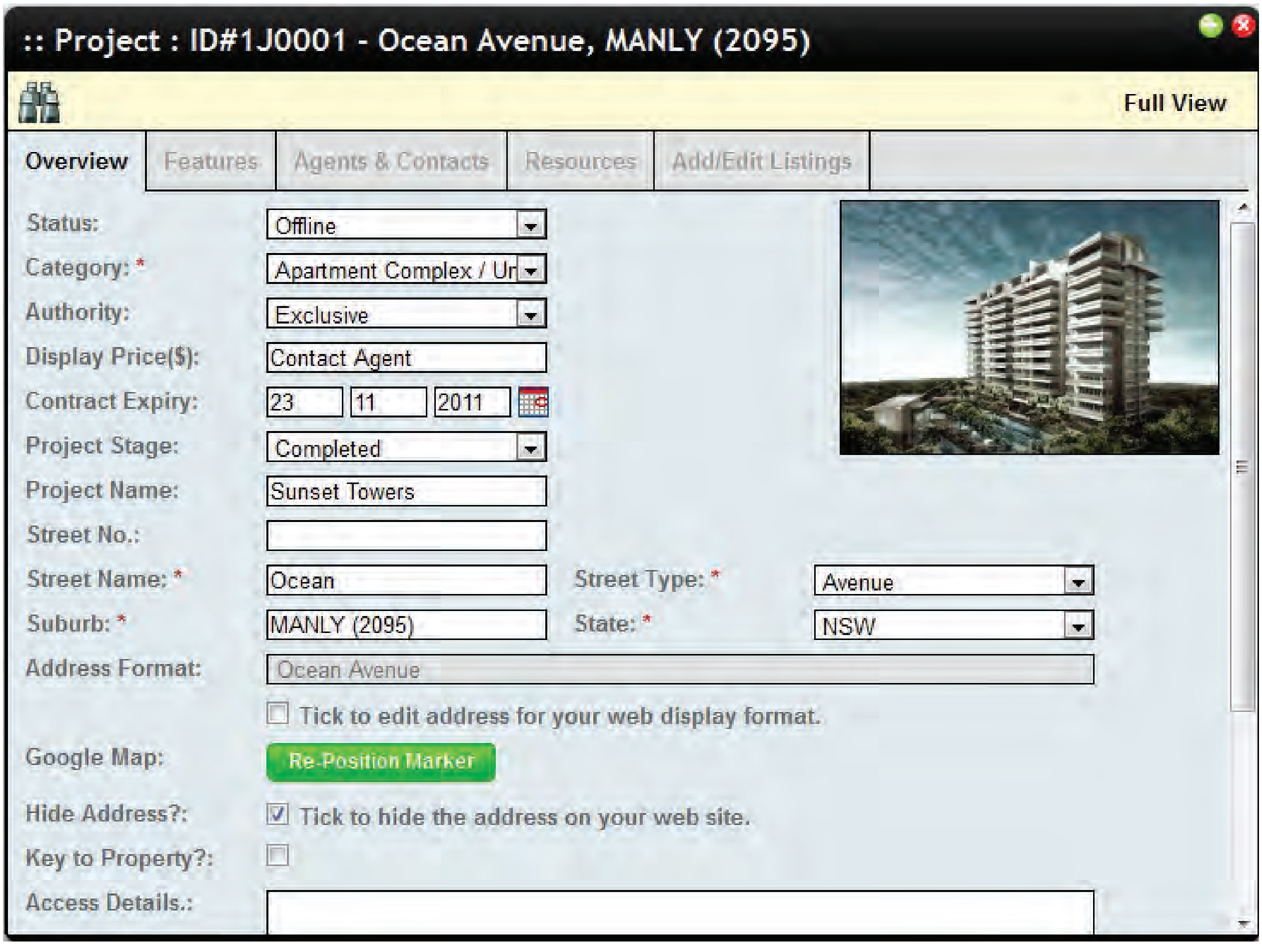
1. Click on Projects from the Universal Search Bar at the top of the screen

2. Enter Project Name, Project ID or Suburb Name

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



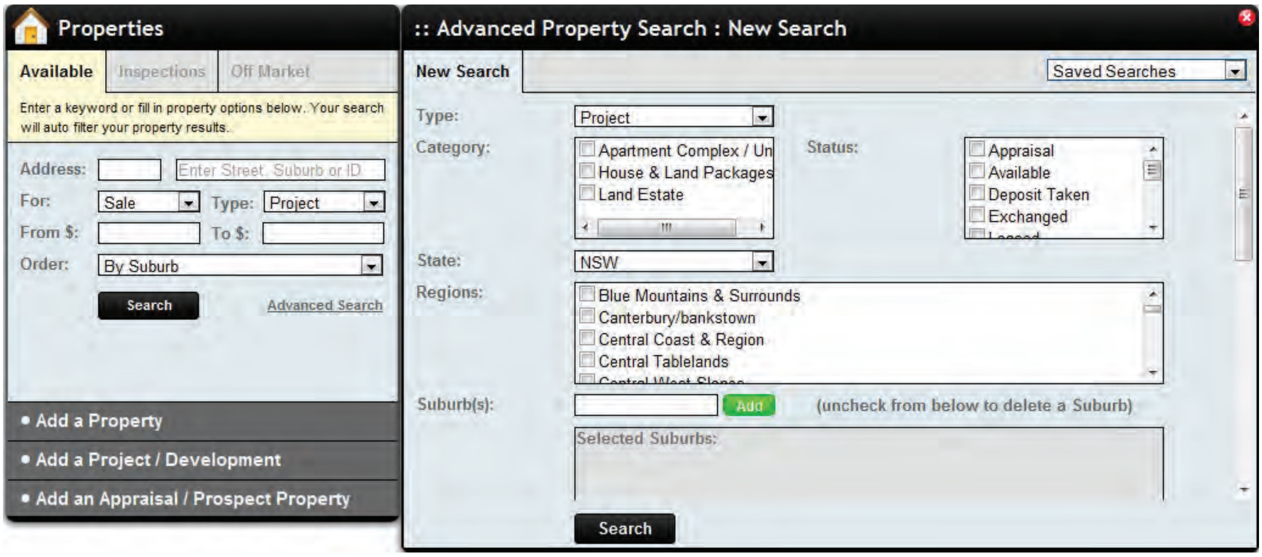
4. Click on the Project Photo, address or the Search arrow  to open the project.



Advanced Property Search

1. Click on Properties icon from the main menu

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



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

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

4. Click on Search

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

Search for Appraisal Properties

How do I Search for Appraisal Properties in Agentbox?

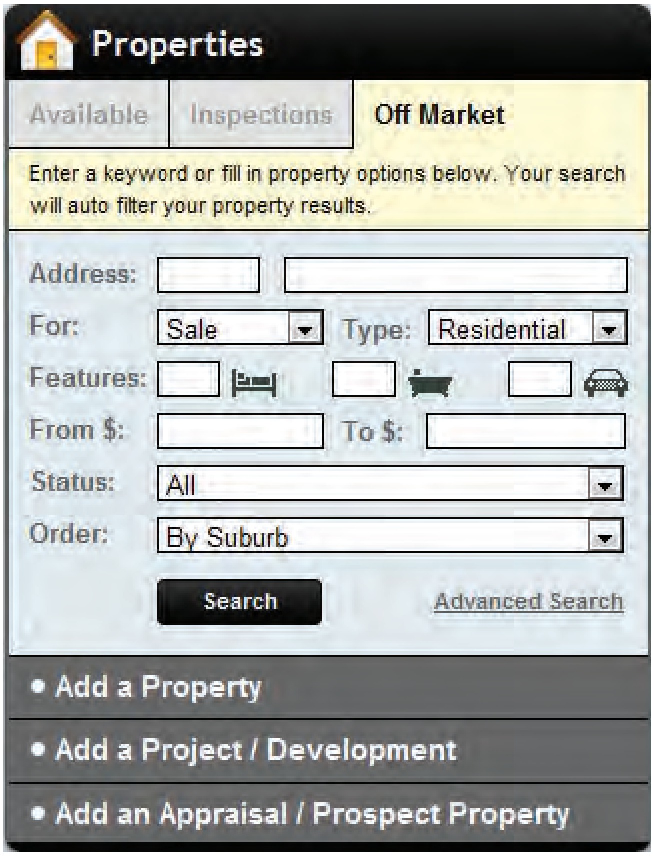
There are three ways in which to search for an Appraisal property:

- Through the Left Panel Fast Find
- Through the Universal Search Bar
- Through an Advanced Property Search

Left Panel Fast Find

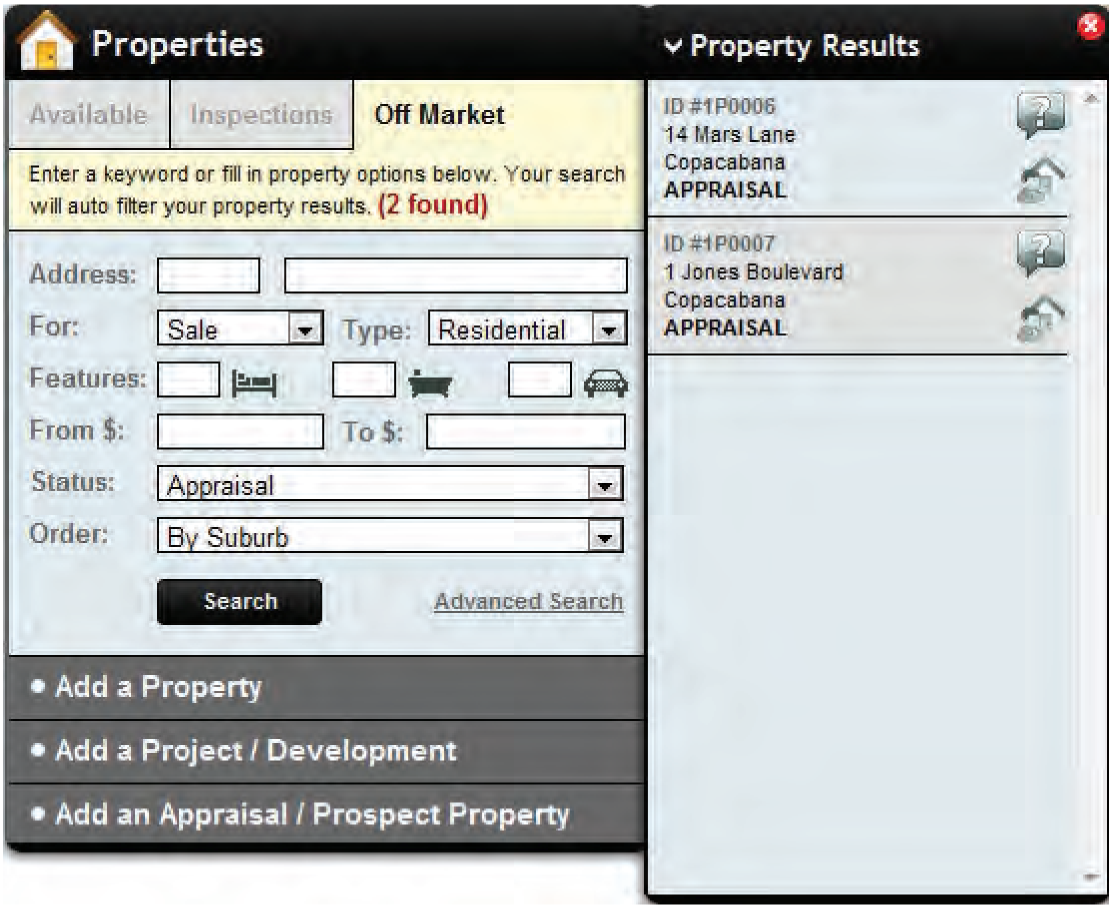
1. Click on the Properties icon from the main menu

2. Select the Off Market tab



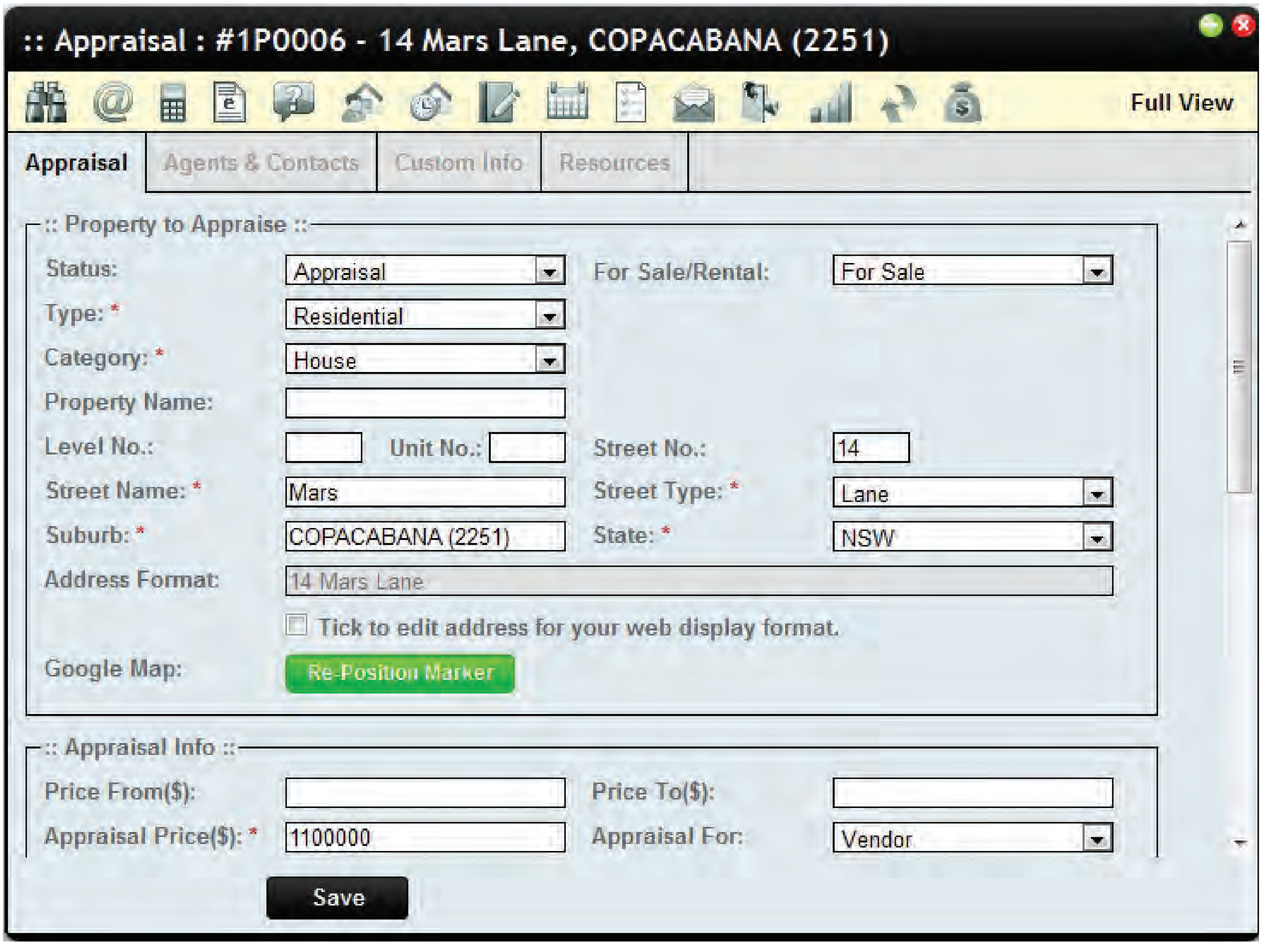
3. Click on the Status drop down and select Appraisal

4. Click on Search



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

7. Your Appraisal property will appear on screen



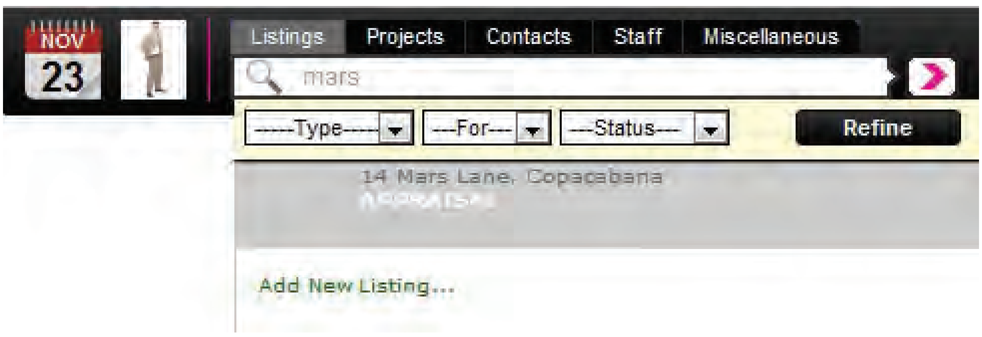
Universal Search Bar

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

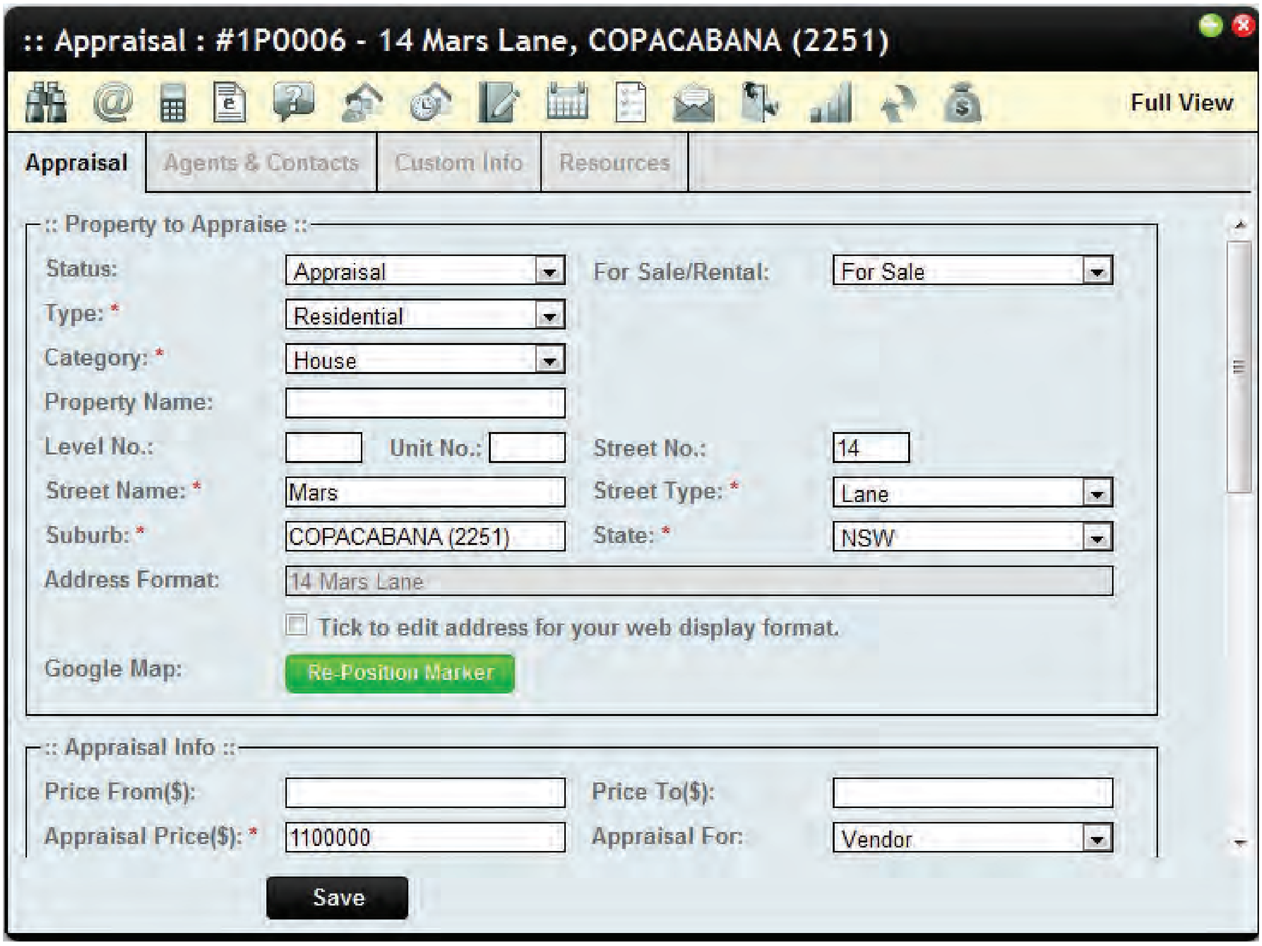
2. Enter Listing ID, Street Number, Name or Suburb Name

3. Select Appraisal from the Status dropdown and click Refine to refine your search

4. A list of Appraisals will appear in a drop down



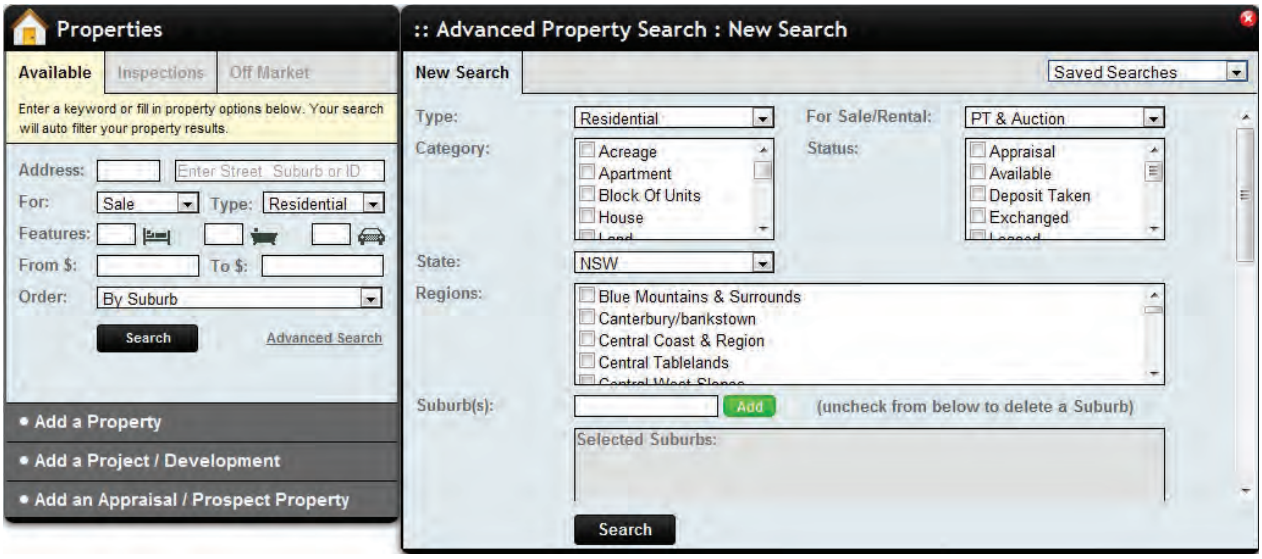
5. Click on the Appraisal Property address or the Search arrow  to open the property card



Advanced Property Search

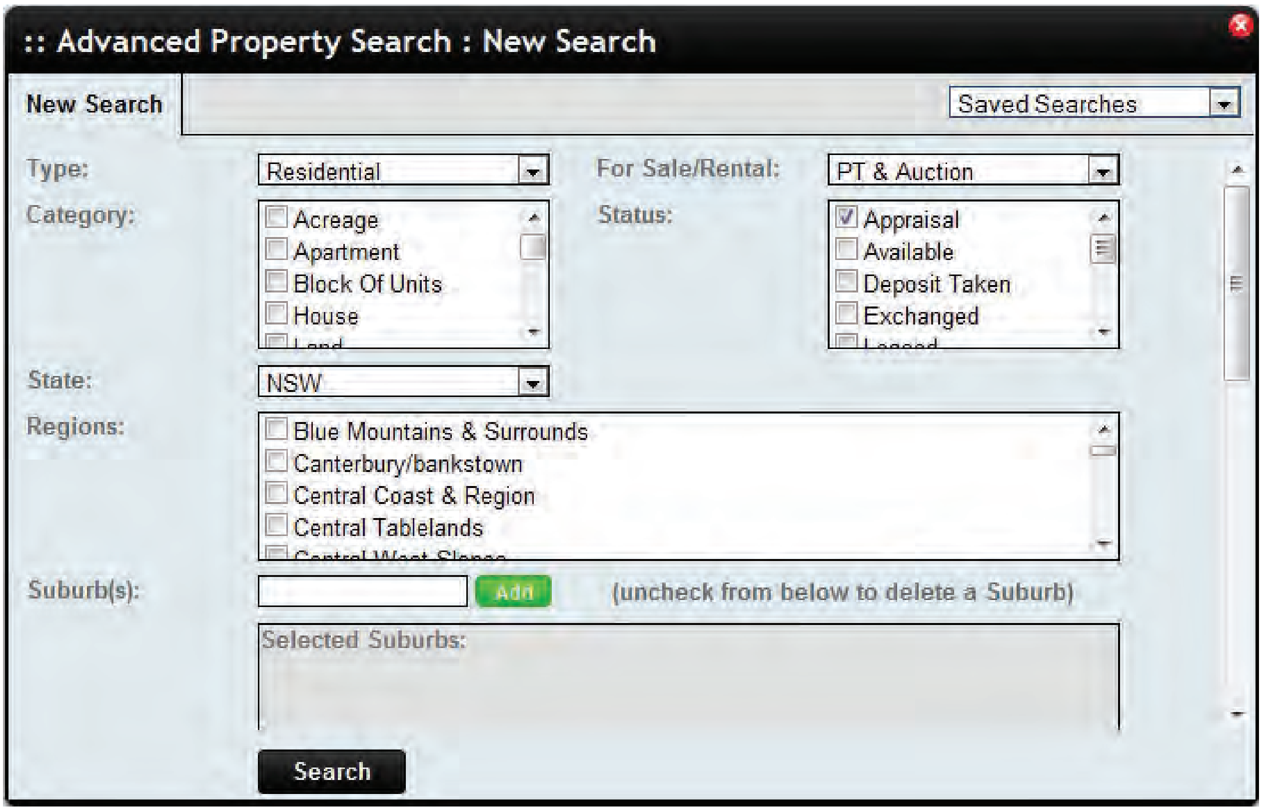
1. Click on Properties icon from the main menu

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

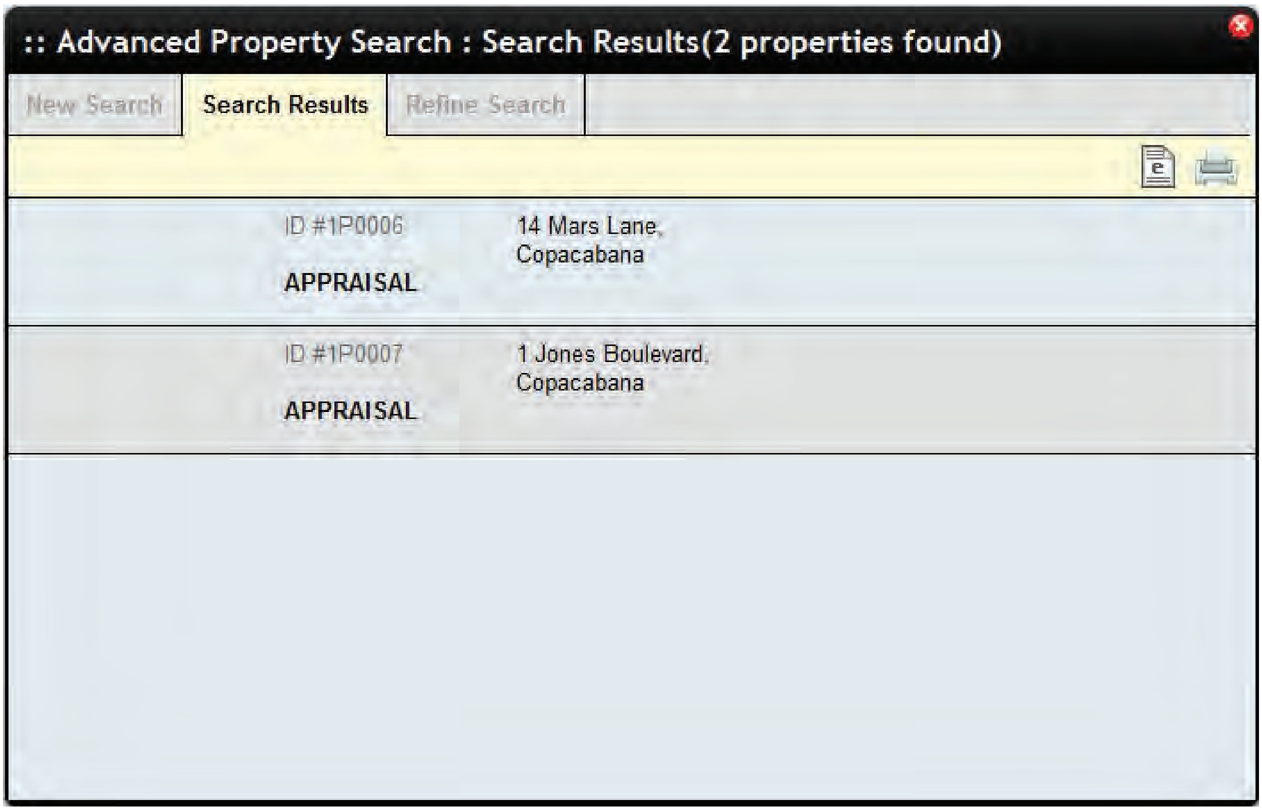


3. Enter your Search Criteria into the appropriate fields. You can search by:

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



4. Click on Search



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

Search for Prospect Properties

How do I Search for Prospect Properties in Agentbox?

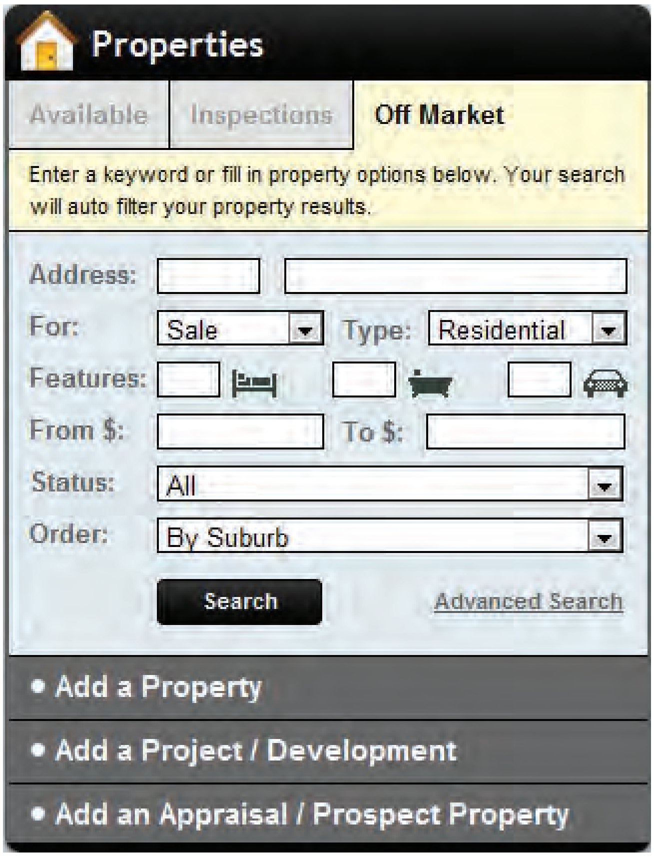
There are two ways in which to search for an Appraisal property:

- Through the Left Panel Fast Find
- Through an Advanced Property Search

Left Panel Fast Find

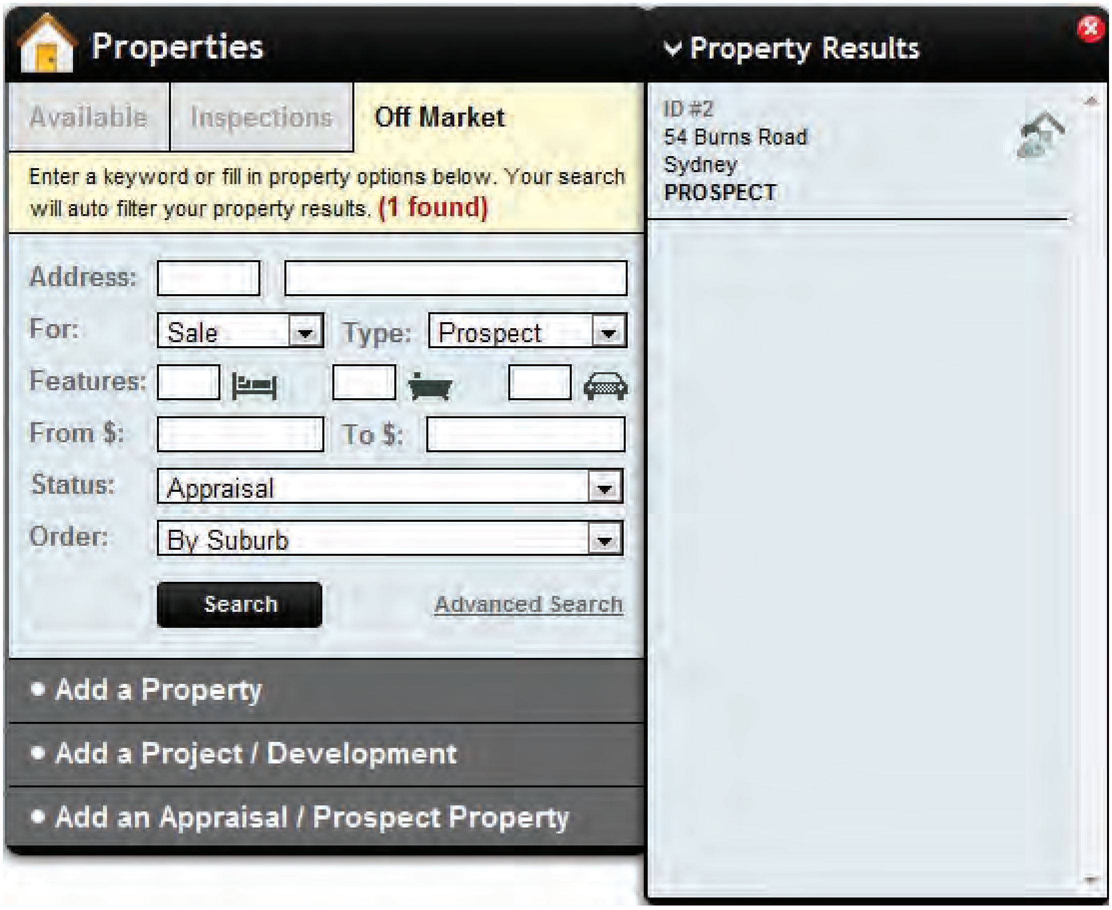
1. Click on the Properties icon from the main menu

2. Select the Off Market tab



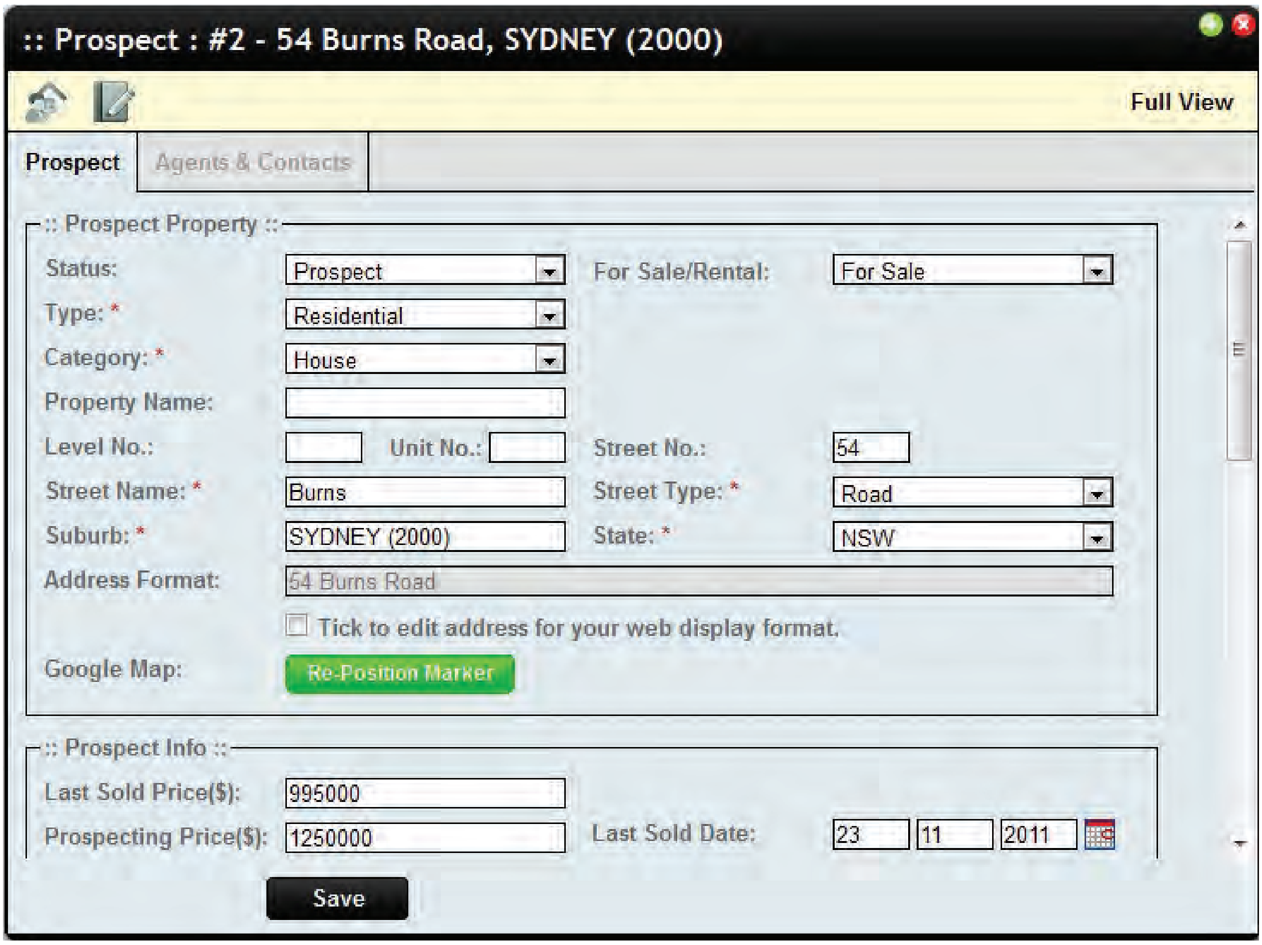
3. Click on the Type drop down and select Prospect

4. Click on Search



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

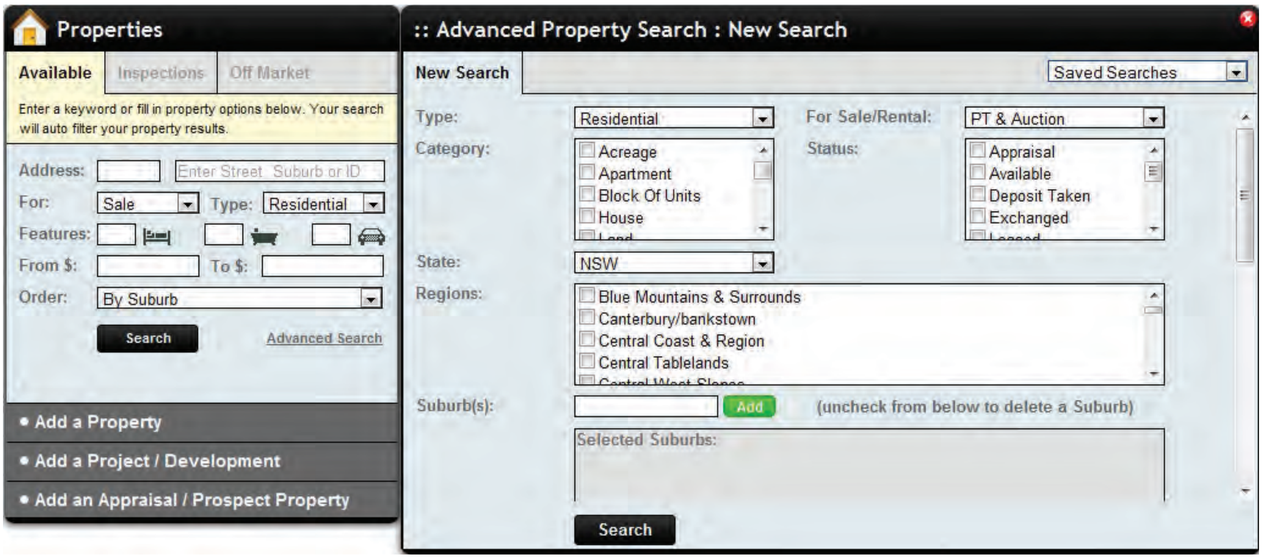
7. Your Prospect property will appear on screen



Advanced Property Search

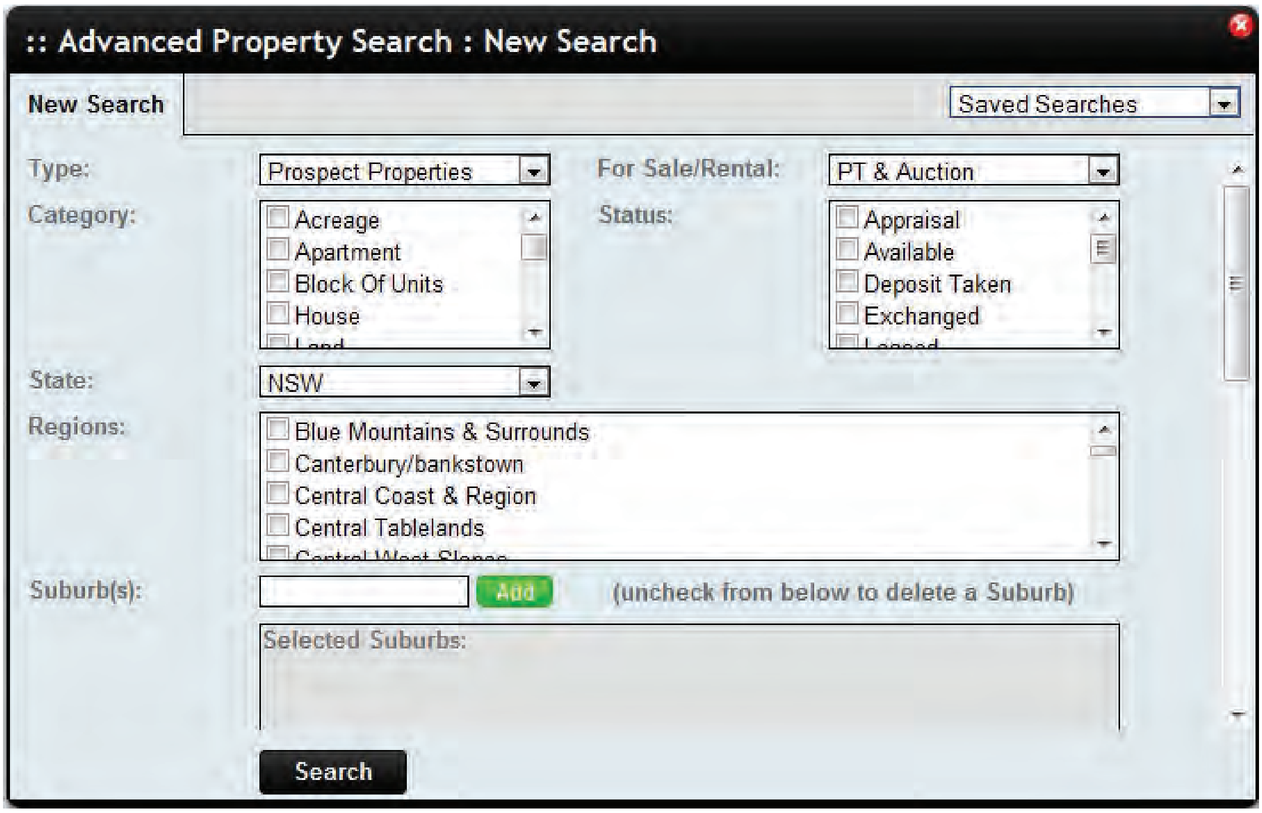
1. Click on Properties icon from the main menu

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

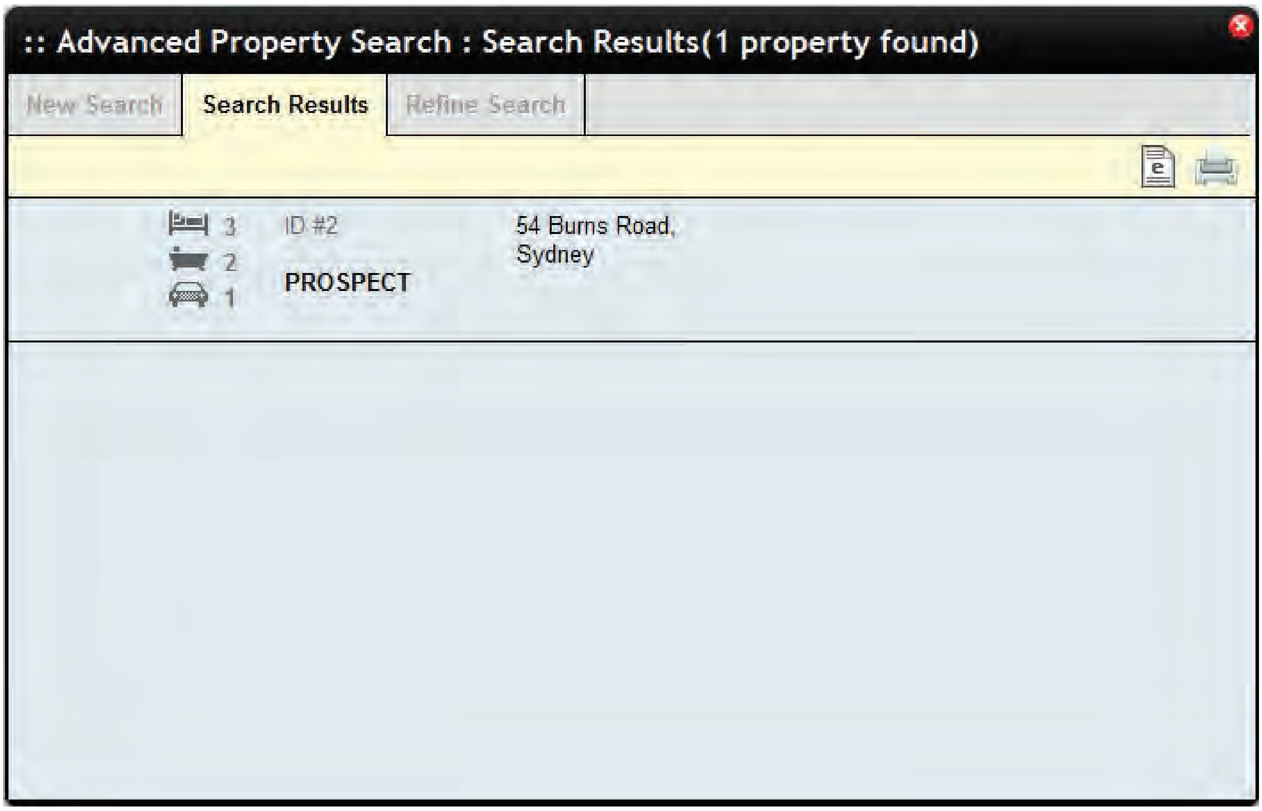


3. Enter your Search Criteria into the appropriate fields. You can search by:

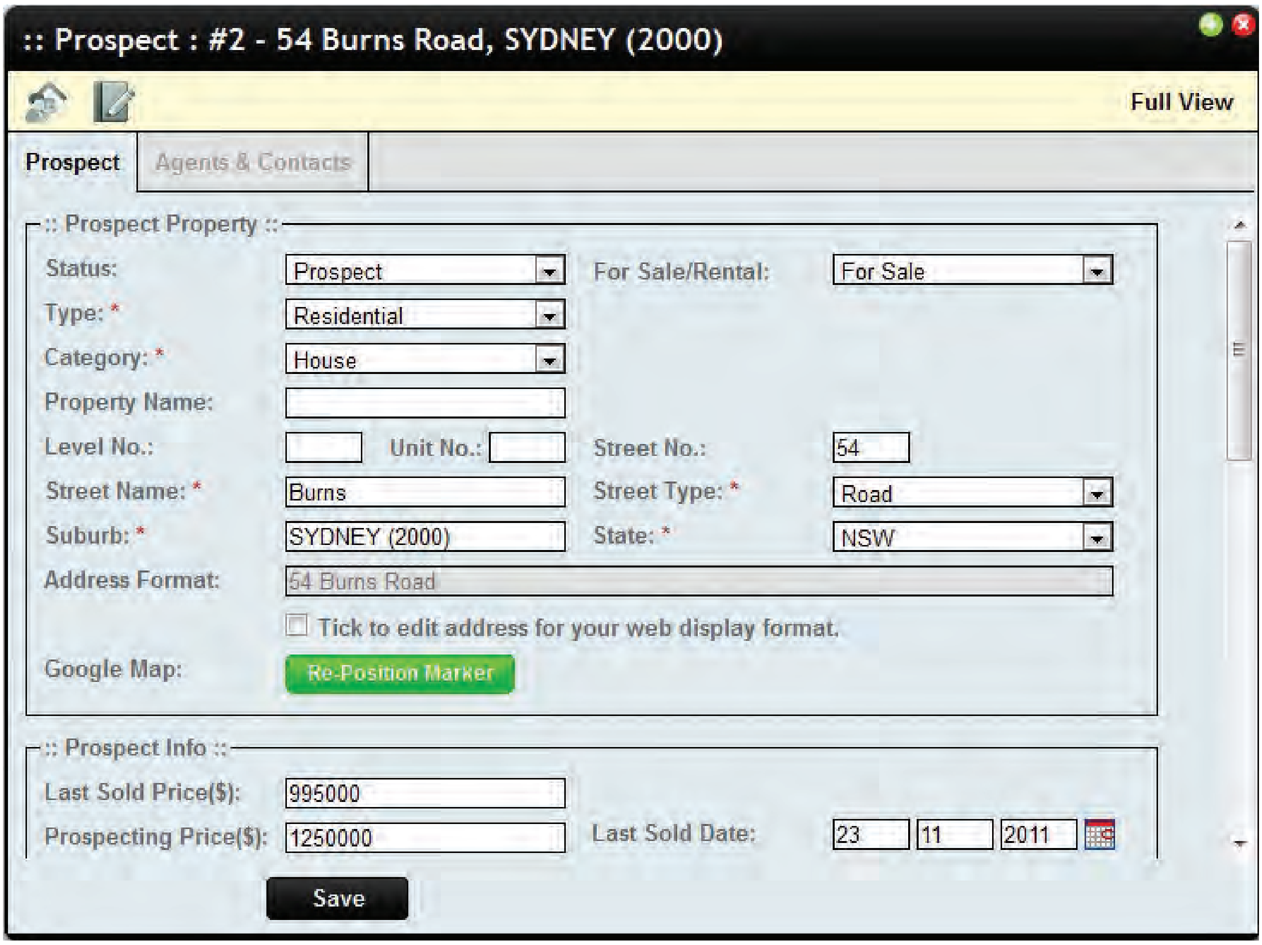
* Type: **Prospect Properties**
* For Sale/Rent: PT & Auction, Rent, Sale Only, Auction Only
* Category:
  Residential: Acreage, Units, Block of Units, Development, House, Land, Semi/Duplex, Studio, Terrace, Townhouse, Unit, Villa
  Rural: Acreage, Cropping, Dairy, Farmlet, Horticulture, House, Land,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



4. Click on Search



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

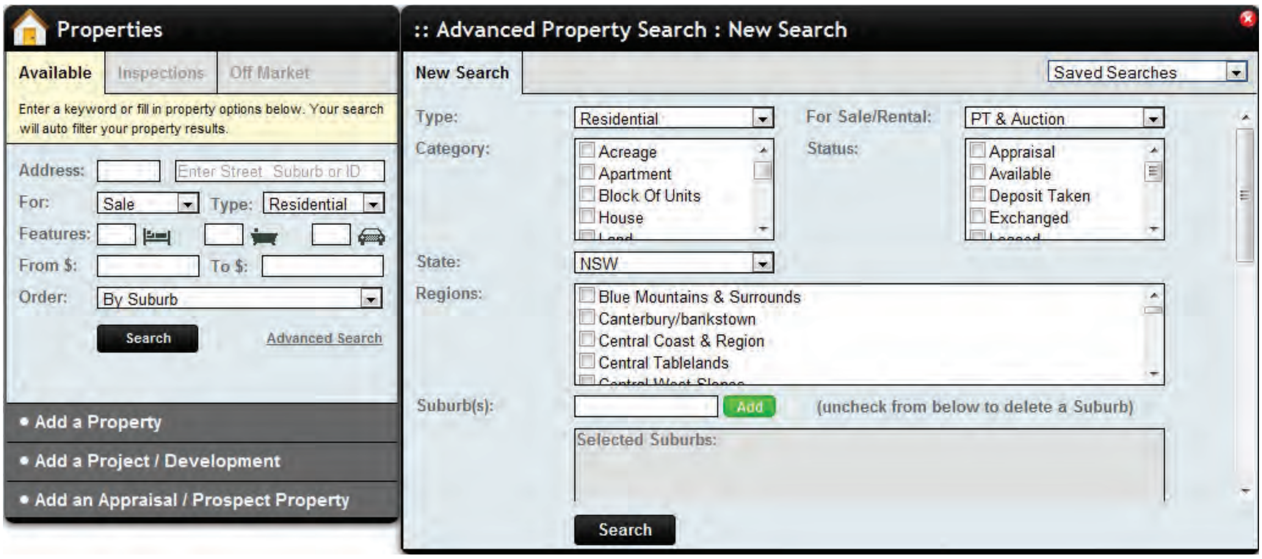


Advanced Property Search

How do I perform an Advanced Property Search?

1. Click on the Property icon from the main menu

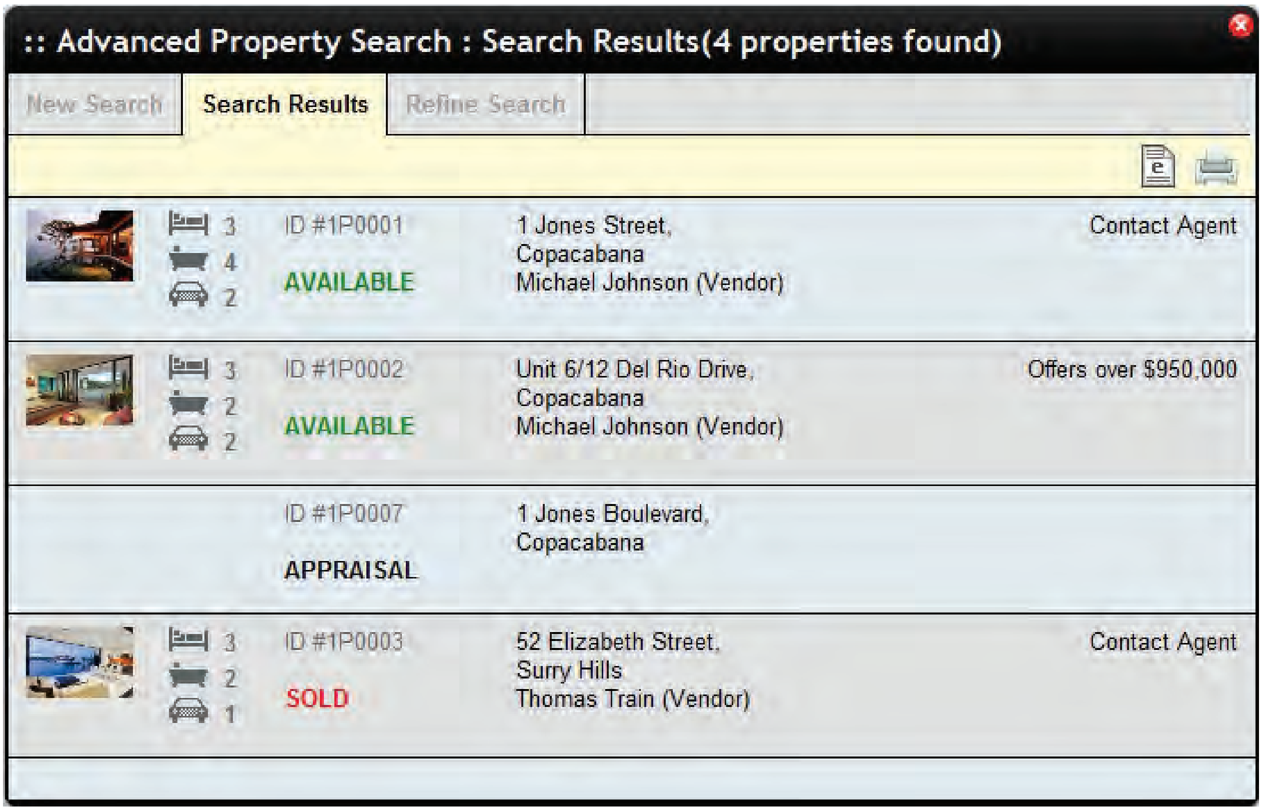
2. Click on Advanced Search from Left Panel



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

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

4. Click Search



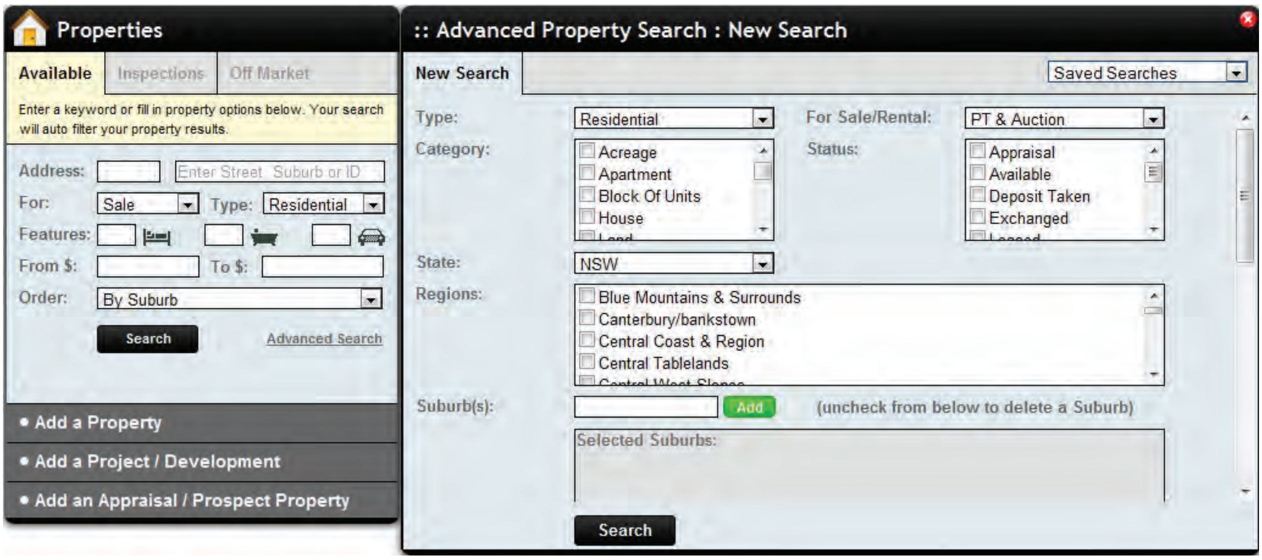
5. Click on the property of your choice from the Search Results Panel

How do I save my Property Search in Agentbox?

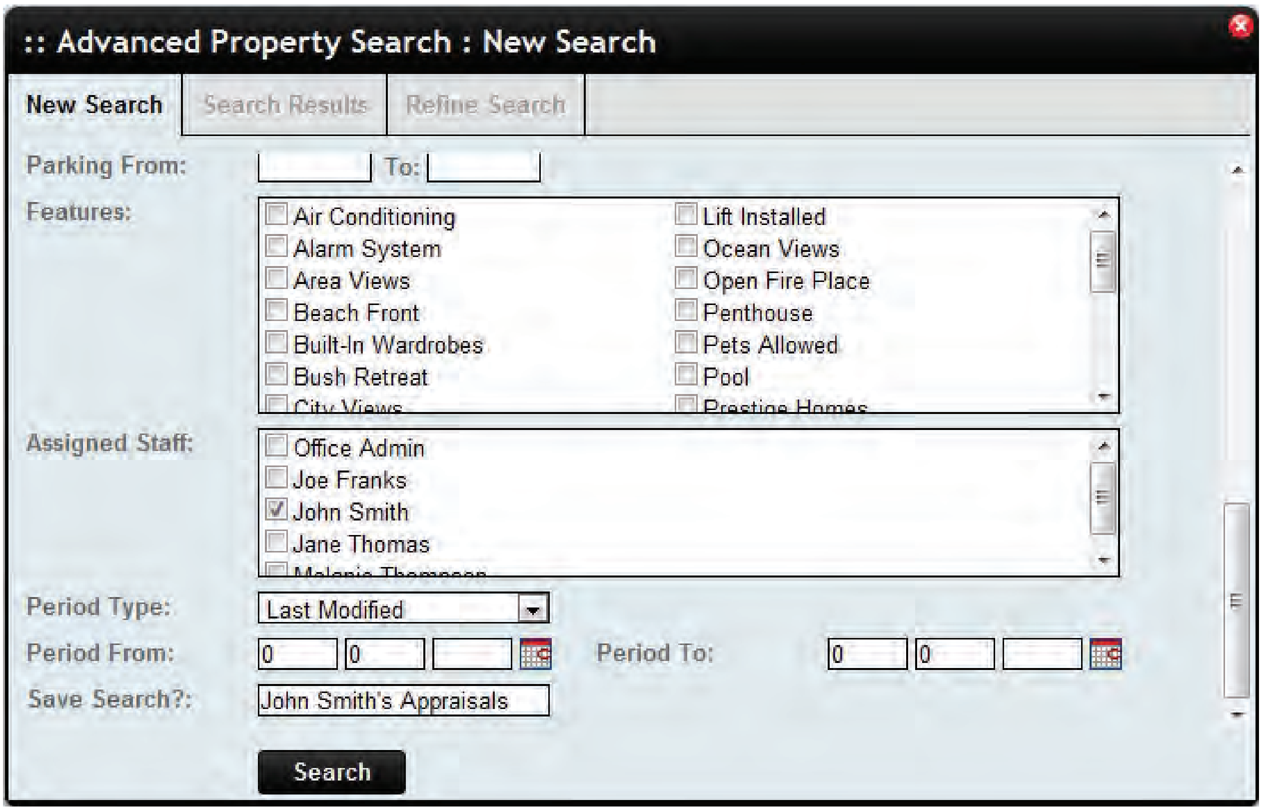
**Note: the saved search will save the search criteria not the actual results so new properties will appear each time you run the search.*

1. Open the Advanced Property Search panel

2. Enter your Search Criteria into the appropriate fields



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

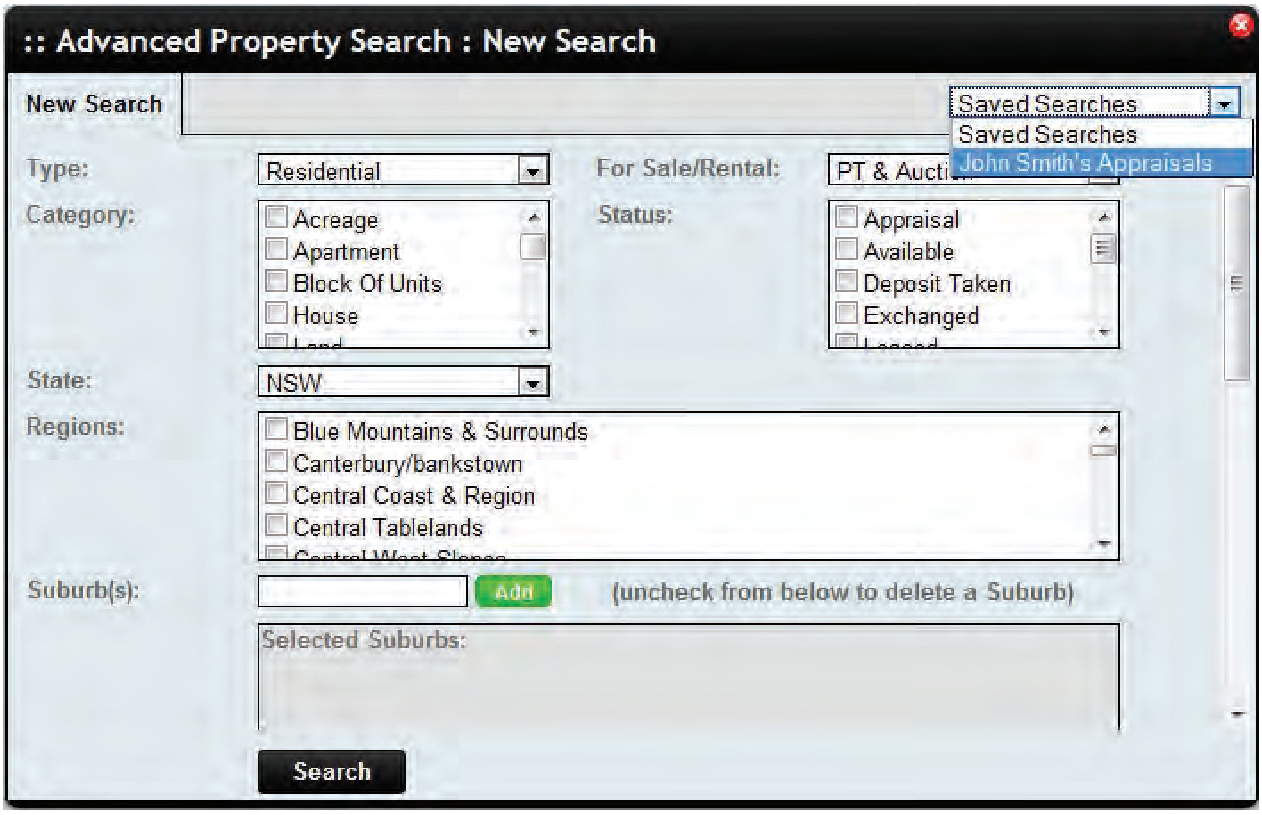


2. Click on Search

How do I find my Saved Search in Agentbox?

1. Open the Advanced Property Search panel

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



3. Your Target List will appear on screen

How do I edit a saved property search?

1. Open one of your saved searches.

2. Click on the Refine Search tab

3. Alter search requirements as you wish

4. Click Search.

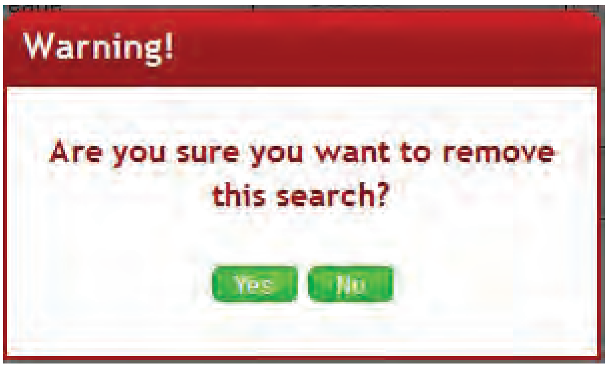
How do I remove a saved property search?

1. Open one of your saved searches.

2. Click on the Refine Search tab.

3. Click on the red Remove Saved Search button

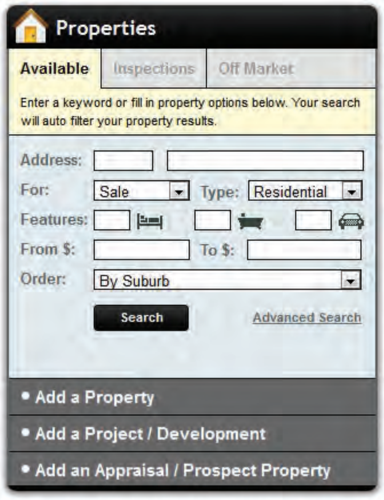
4. Click Yes

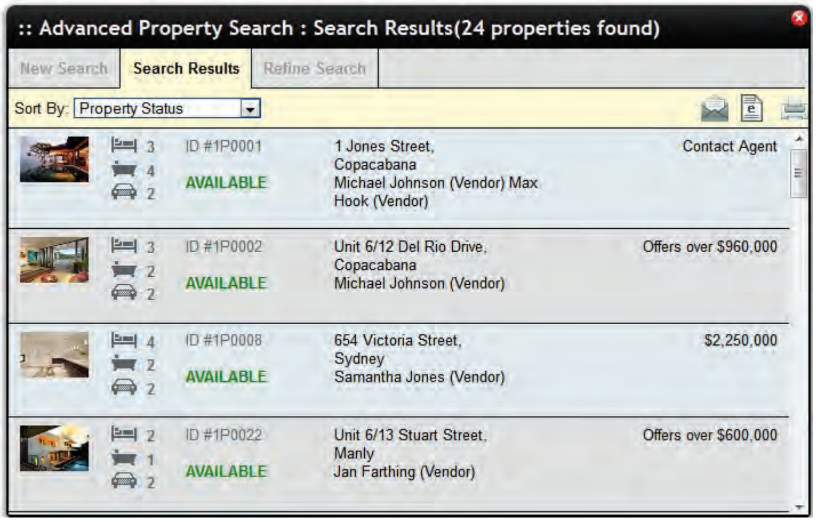


Print Detailed Property Report

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 





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.

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

Detailed Listings Report

ID	Address	Suburb	Type	Features	Listing Details	Status	Advertised Price	Contact(s) associated	Agent(s) associated	Notes
#1P0001	1 Jones Street	Copacabana	For Sale: Residential (House)	Bed: 3 Bath: 4 Park: 2	Authority: Exclusive Method: Private Treaty Listed: 19-08-2011 Expiry: 17-11-2011	Available (16-01-2012)	Contact Agent	Buyer: Mary May [E]:mm@hotmail.com [H]:02 9209 4174 [M]:0411 222 555 [W]:02 9523 5642 Vendor: Michael Johnson [E]:mick@gmail.com [H]:02 9564 2533 [M]:0411 222 333 Tenant: Joseph Thomas [E]:joe@hotmail.com [W]:02 9467 7354 Vendor Solicitor: David Kim [E]:dk@bigpond.net.au [M]:0401 234 567 [W]:02 9100 1234 Buyer Solicitor: Julia Bum [E]:jb@gmail.com [M]:0400 000 123 [W]:02 9100 000 Vendor: Max Hook [E]:mh@bigpond.net.au [H]:02 9100 1000 [M]:0412 222 333	Listing Agent: Jane Smith Selling Agent: Jane Smith	Last 3 notes: 20 Oct 2011 Vendor is going on holiday. Contact on return for a property update. - Holidaying in Vanuatu with wife. Won holiday through a radio competition. Returning 30.10.11 *(Added by: Melanie Thomas)*
#1P0002	Unit 6/12 Del Rio Drive	Copacabana	For Sale: Residential (Villa)	Bed: 3 Bath: 2 Park: 2	Authority: Exclusive Method: Auction *(20-10-2011 13:00)* Listed: 16-09-2011 Expiry: 15-12-2011	Available (22-11-2011)	Offers over $960,000	Vendor: Michael Johnson [E]:mick@gmail.com [H]:02 9564 2533 [M]:0411 222 333	Listing Agent: Jane Smith Listing Agent: Marcus Thompson	Access Details: Key no:17
#1P0029	3 Smith Street	Copacabana	For Sale: Residential (House)	Bed: 3 Bath: 2 Park: 2	Authority: Exclusive Method: Private Treaty Listed: 05-04-2012 Expiry: 04-07-2012	Available (05-04-2012)	Offers over $1 million		Listing Agent: Jane Smith	

Preview Property

How can I preview my property?

1. Search for your Property and open the Property Card

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

Vendor Preview Link

How do I create a Vendor Preview Link?

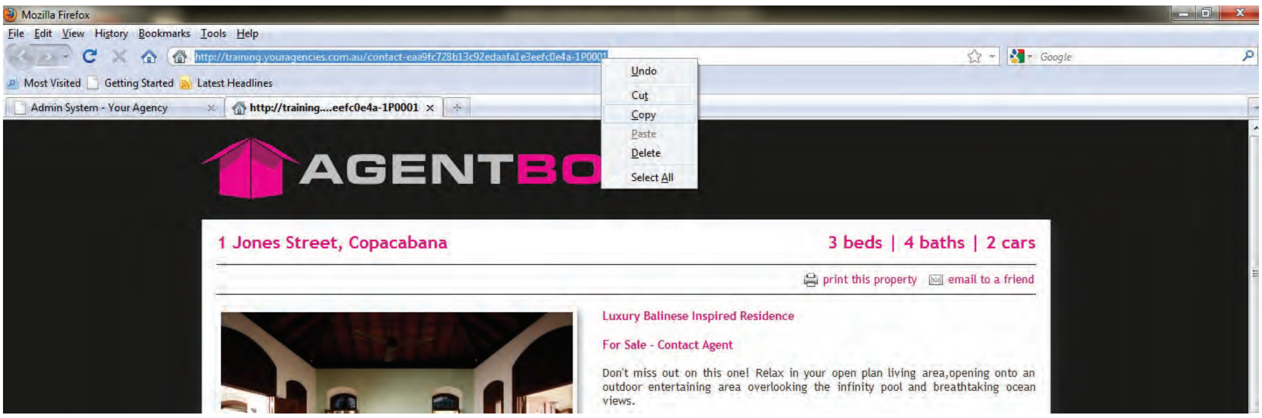
This page is used to check whether your details are correct before uploading the property to the web, you can send the vendor this link to preview the property.

1. Search for your Property and open the Property Card

2. Click on the green Vendor Preview Link button on the General tab below the main photo.
**Note: The Vendor Preview Link button will only appear once a Vendor has been assigned to the property via the Agents & Contacts tab.*

3. The property page will open in a new browser tab.

4. Copy and Paste the URL into an email and send to the vendor.



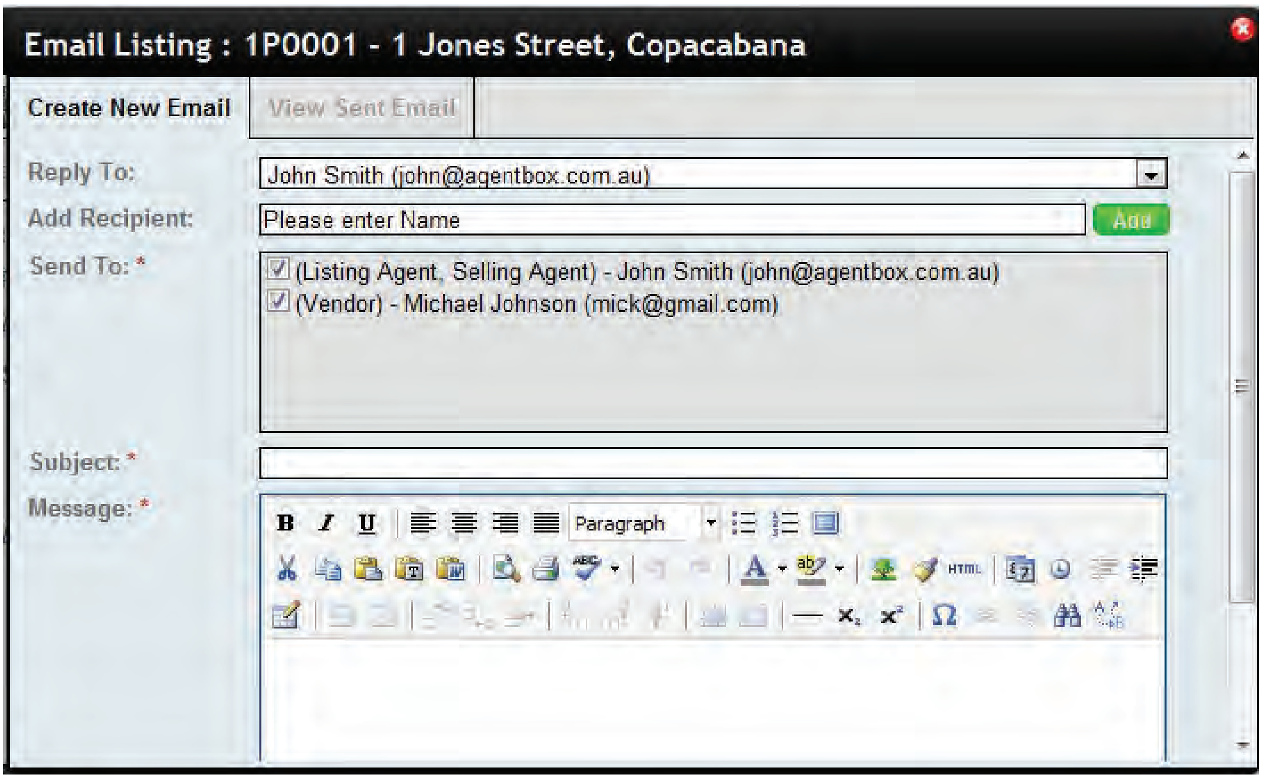
Email Property Contacts

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

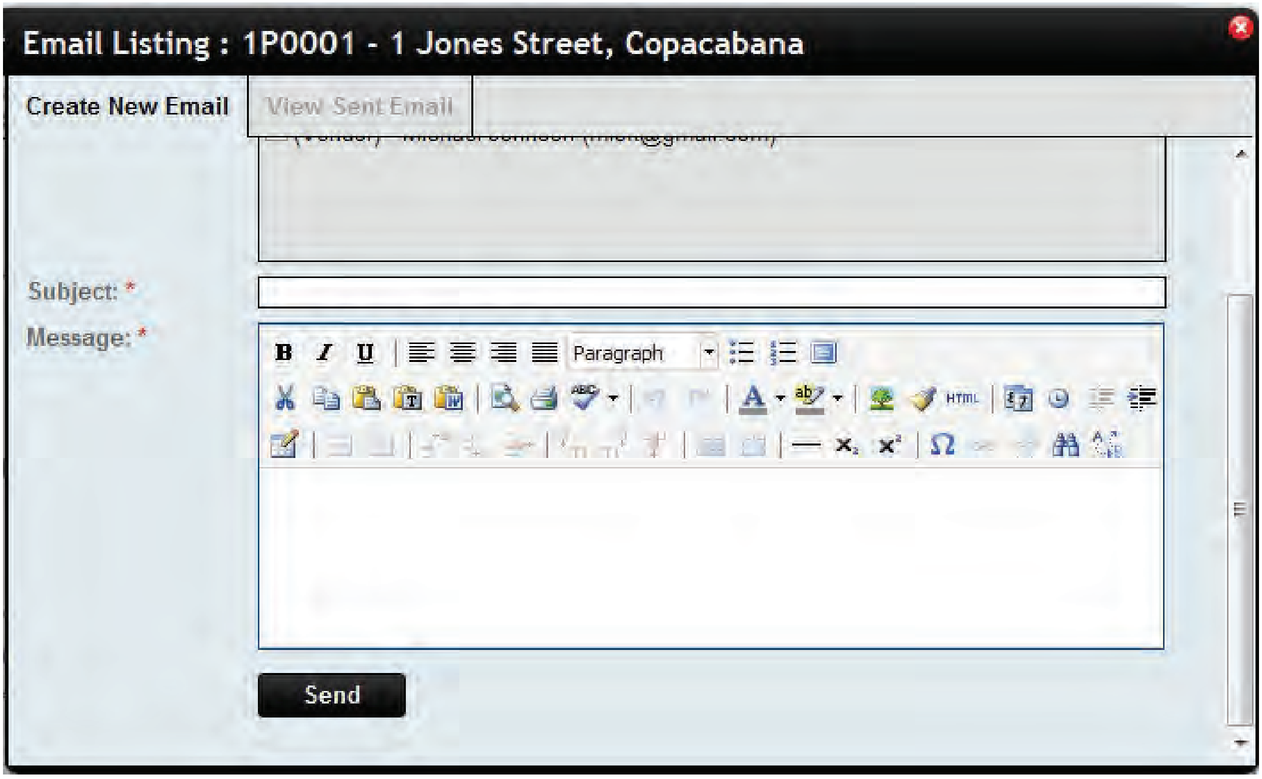
1. Search for your Property and open the Property Card

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

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



3. Click Send



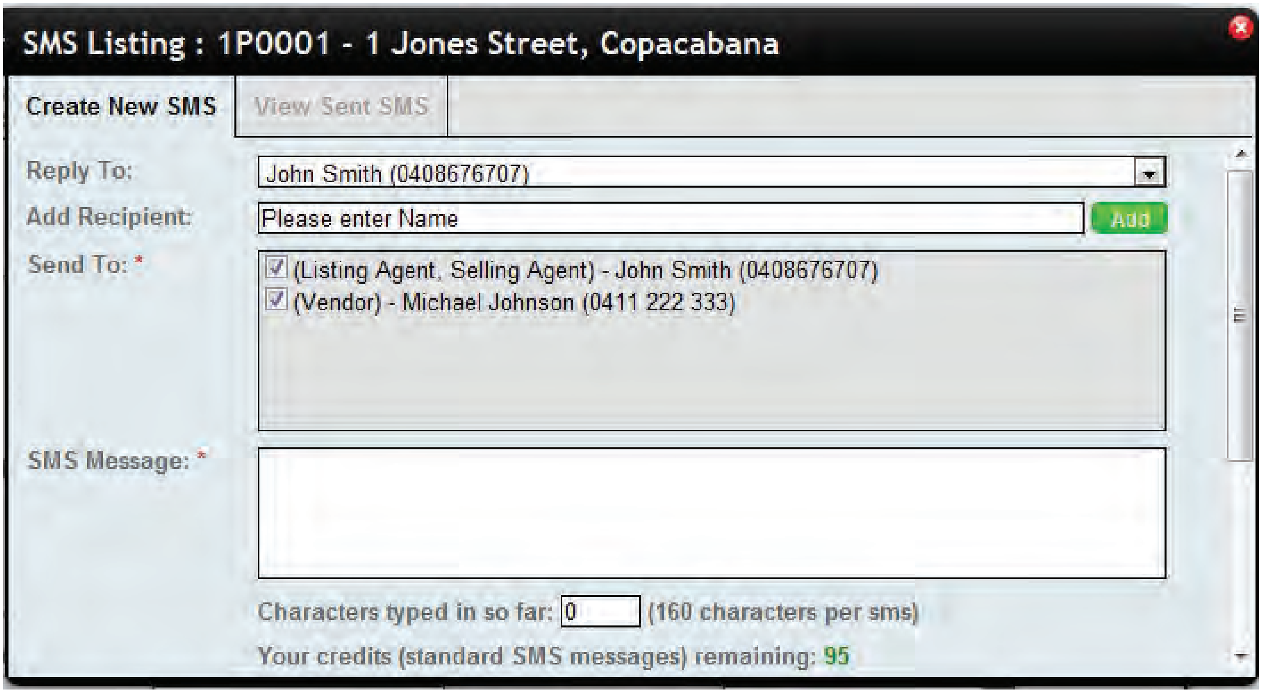
SMS Property Contacts

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

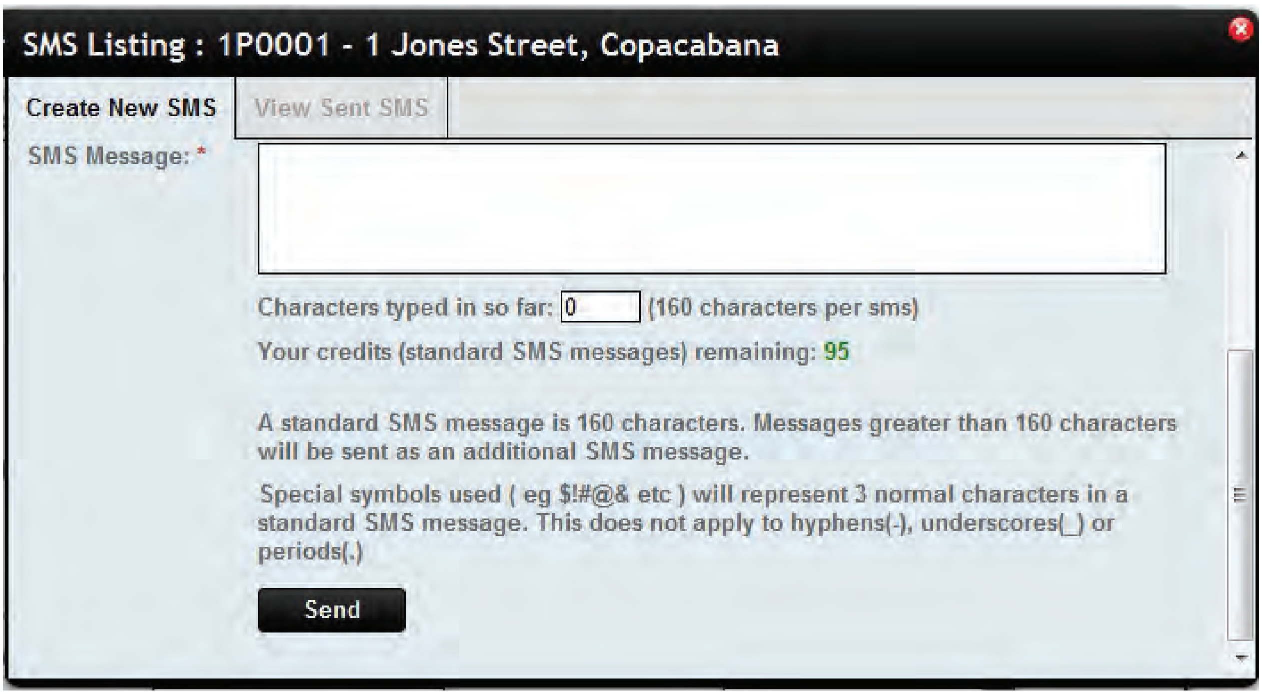
1. Search for your Property and open the Property Card

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

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



3. Click Send



E-Newsletter

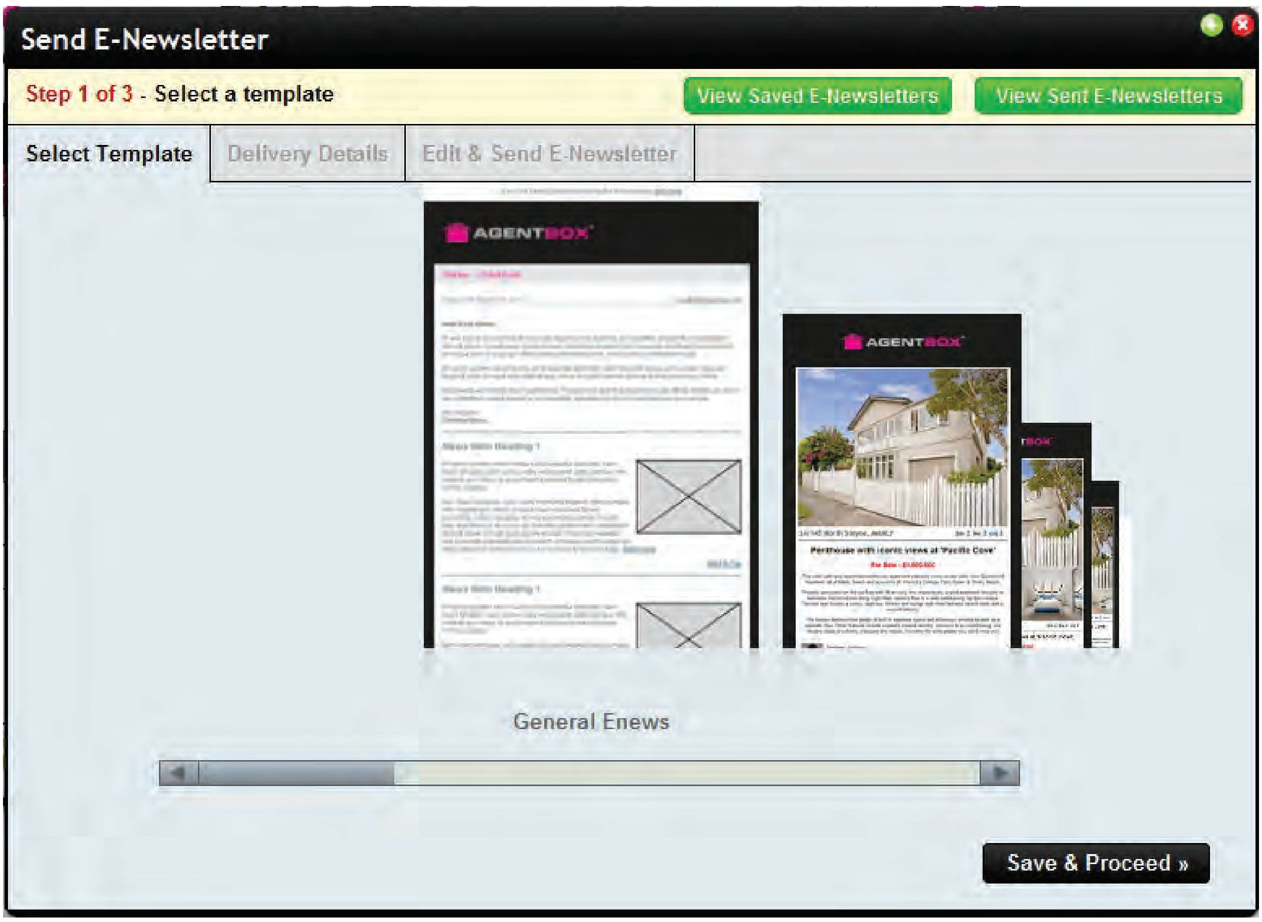
How do I send an E-Newsletter through a Property?

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

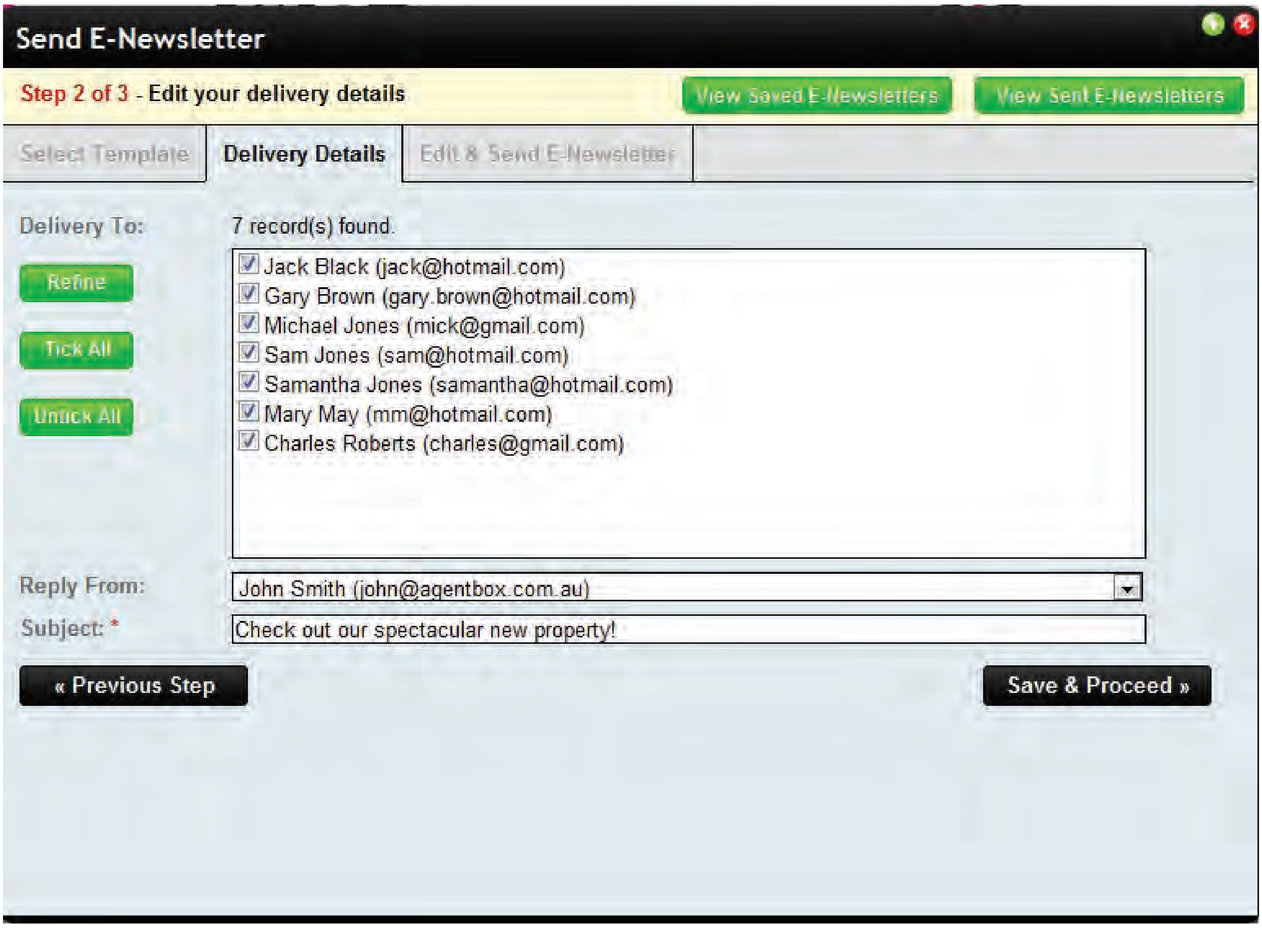
2. Click on the E-Newsletter Action icon

3. Select a template

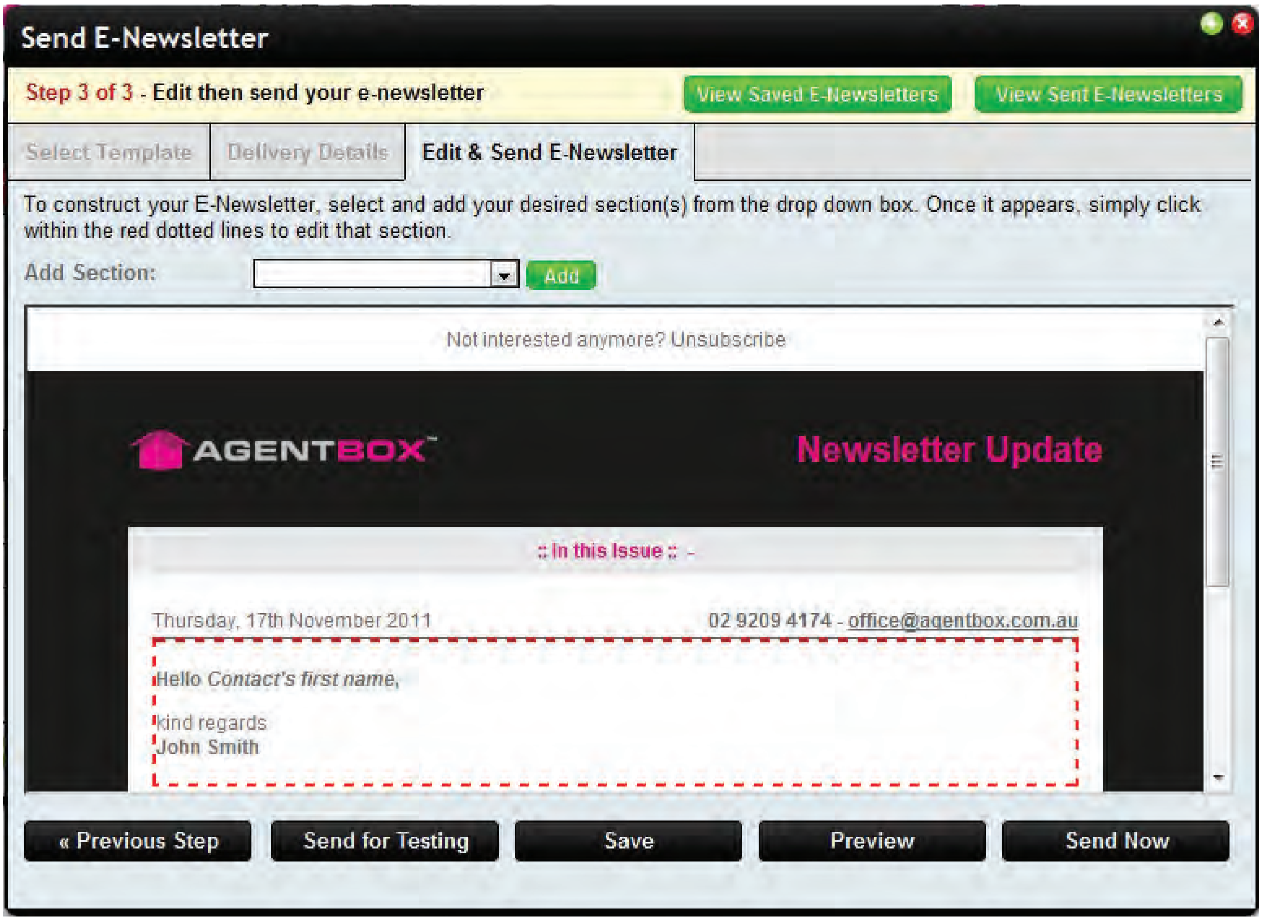


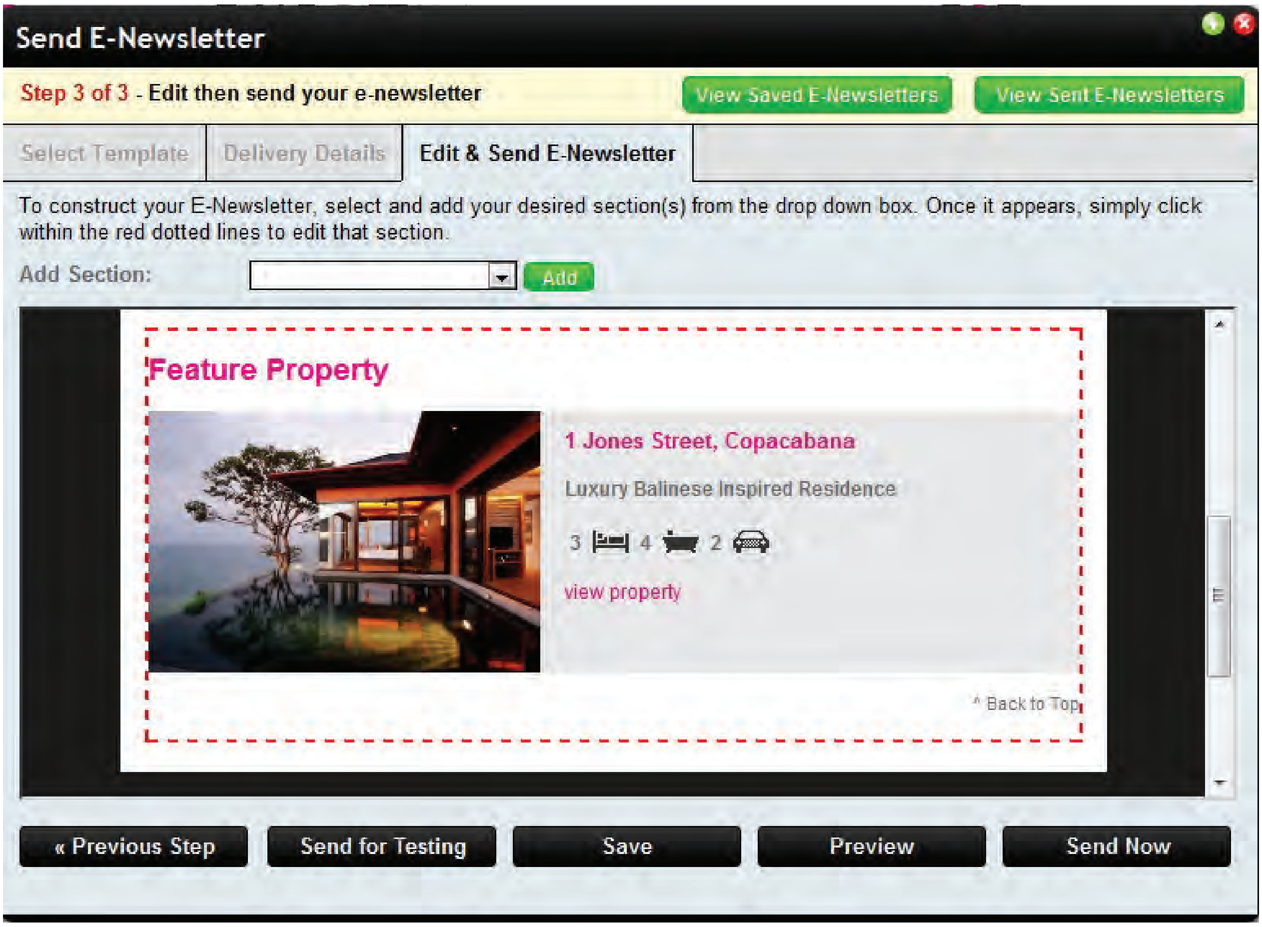
4. Refine the recipients list

5. Enter the E-Newsletter Subject.



6. [Create E-Newsletter]


Send E-Newsletter
Step 3 of 3 - Edit then send your e-newsletter
View Saved E-Newsletters
View Sent E-Newsletters
Select Template
Delivery Details
Edit & Send E-Newsletter
To construct your E-Newsletter, select and add your desired section(s) from the drop down box. Once it appears, simply click within the red dotted lines to edit that section.
Add Section:
Add
Not interested anymore? Unsubscribe
AGENTBOX
Newsletter Update
:: In this Issue :: -
Thursday, 17th November 2011
02 9209 4174 - office@agentbox.com.au
Hello Contact's first name,
kind regards
John Smith
« Previous Step
Send for Testing
Save
Preview
Send Now


Send E-Newsletter
Step 3 of 3 - Edit then send your e-newsletter
View Saved E-Newsletters
View Sent E-Newsletters
Select Template
Delivery Details
Edit & Send E-Newsletter
To construct your E-Newsletter, select and add your desired section(s) from the drop down box. Once it appears, simply click within the red dotted lines to edit that section.
Add Section:
Add
Feature Property
1 Jones Street, Copacabana
Luxury Balinese Inspired Residence
3 4 2
view property
^ Back to Top
« Previous Step
Send for Testing
Save
Preview
Send Now

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

8. Once you are satisfied with your E-Newsletter after a final Preview, you may send a test copy to yourself via the Send for Testing button or send to the recipients using the Send Now button.
**Note: Send for Testing button will send a copy to the email address you have used to log in.*

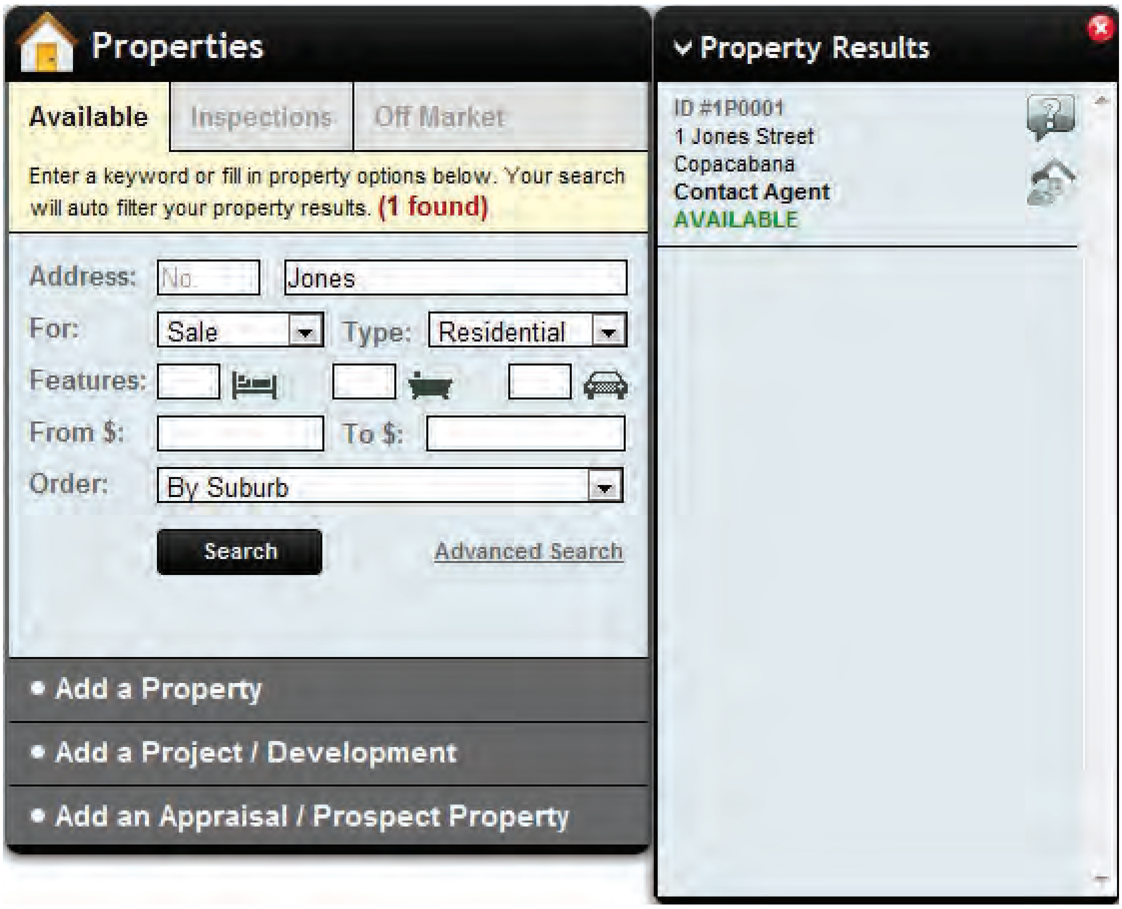
Log a Property Enquiry

How do I log an enquiry from a property?

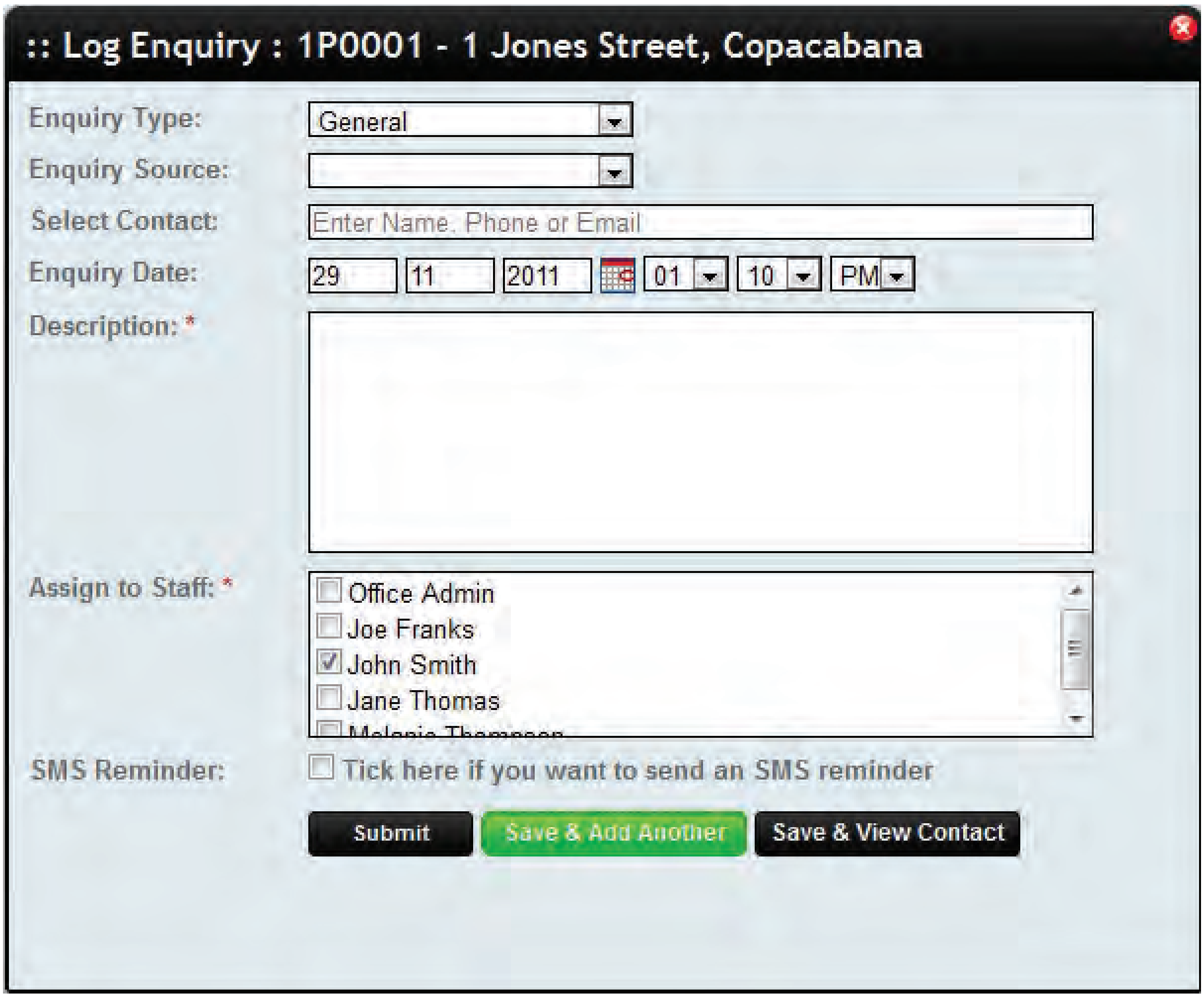
The Log an Enquiry tool does the following:

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

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

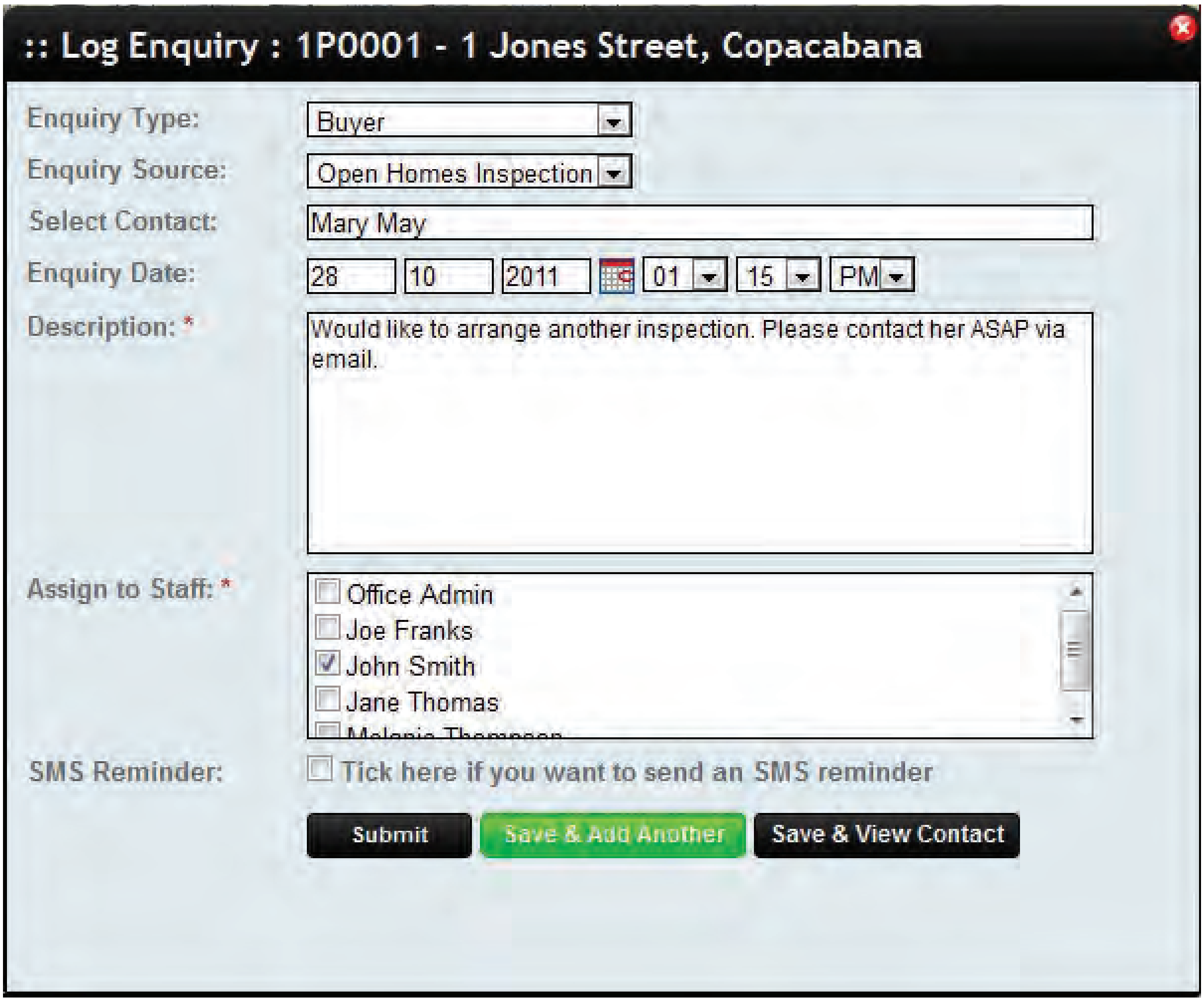


2. Click on the Log an Enquiry action icon 



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)



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

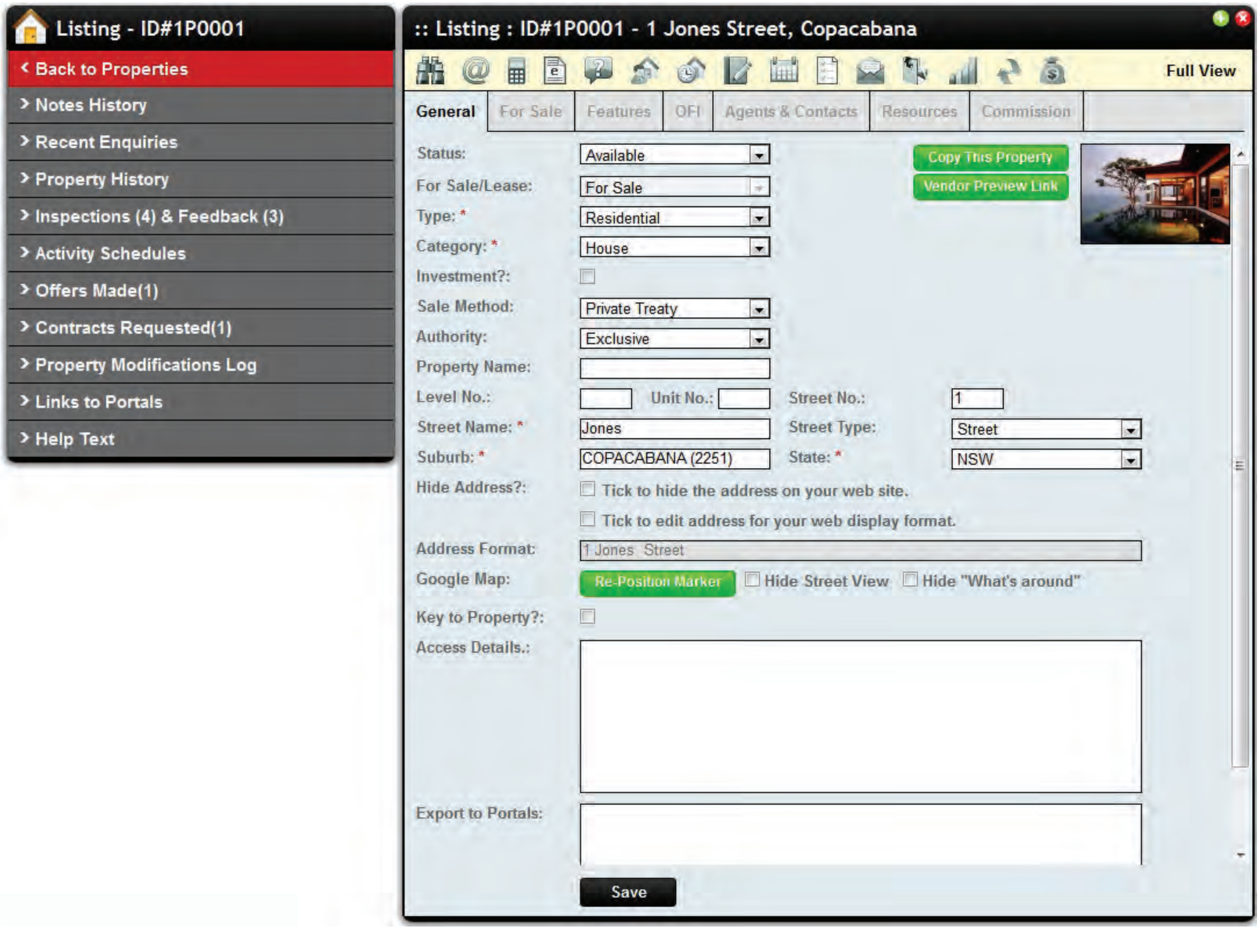
See also..

[How do I view recent property enquiries?]
[How do I communicate to a list of property enquirers?]

View Recent Property Enquiries

How do I view all recent property enquiries?

1. Search for your Property and open the Property Card



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

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

4. Click More Detail next to open the corresponding enquiry

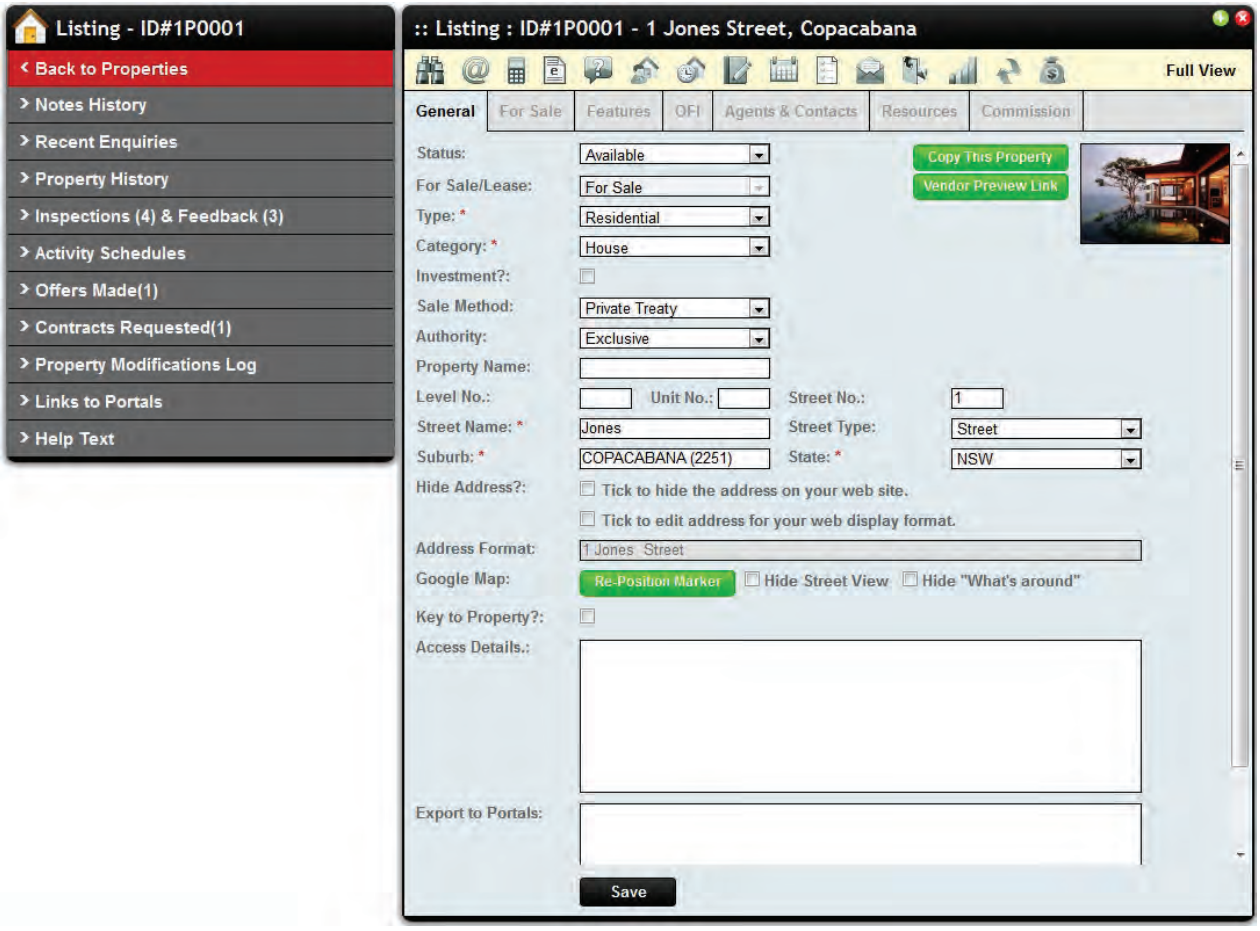
See also...

How do I communicate to a list of recent enquirers

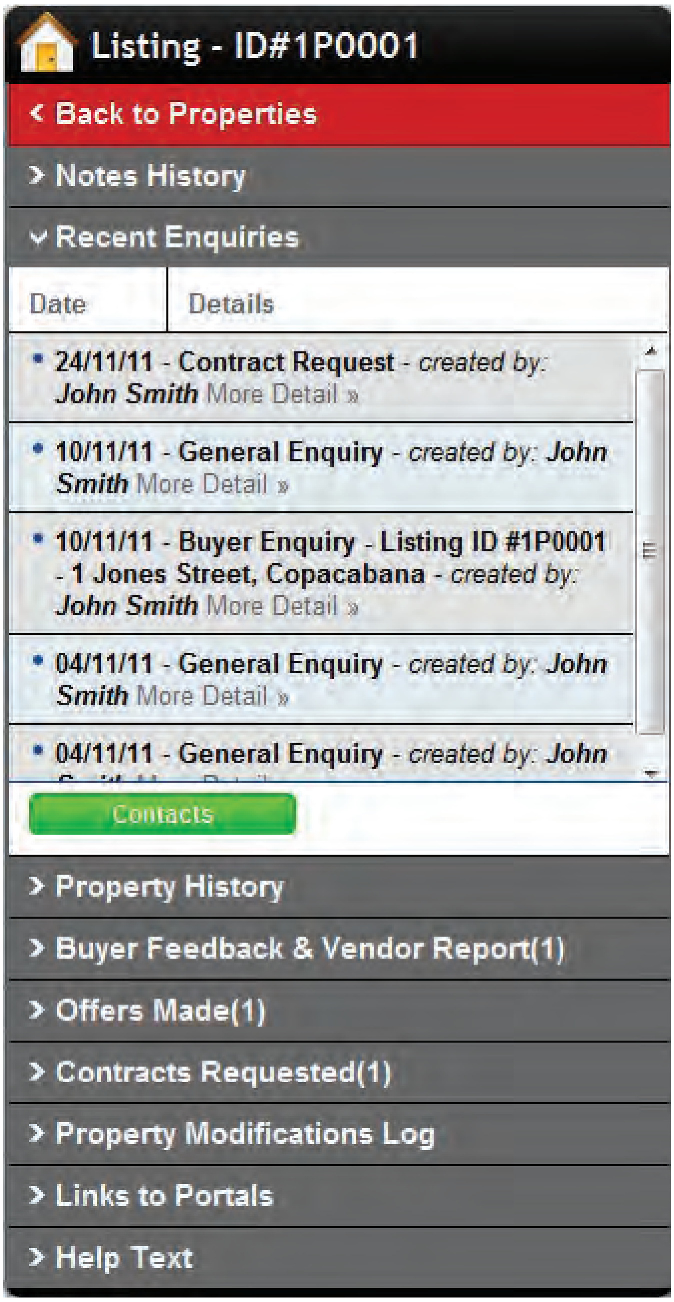
Contact Recent Enquirers

How do I communicate to a list of property enquirers?

1. Search for your Property and open the Property Card

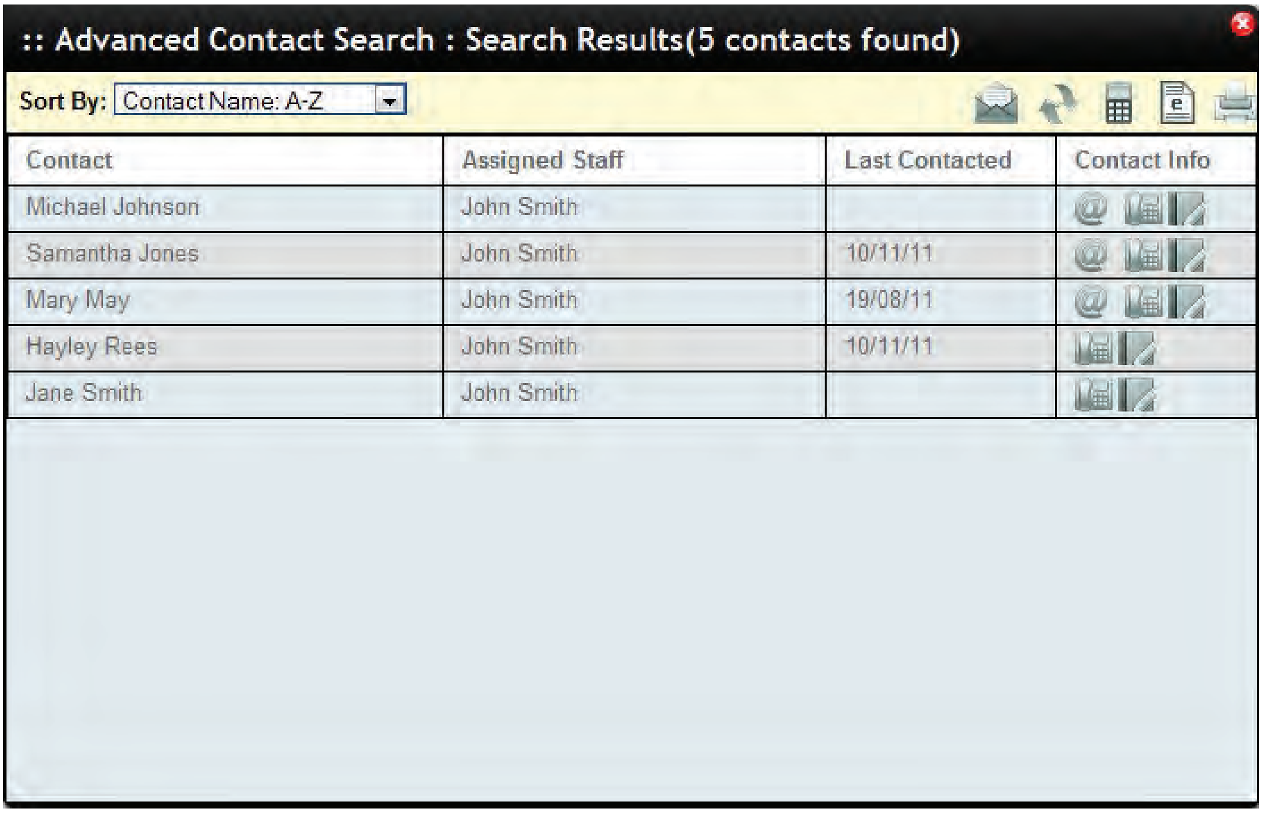


2. Click on Recent Enquiries on the left property panel



3. Click on the green Contacts button

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



See also..

How do I log an enquiry for a property?
How do I view recent property enquirers?
How do I log an enquiry from a contact card?
How do I view recent enquiries for a contact?

Match Contacts

How do I match Contacts to a Property in Agentbox?

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

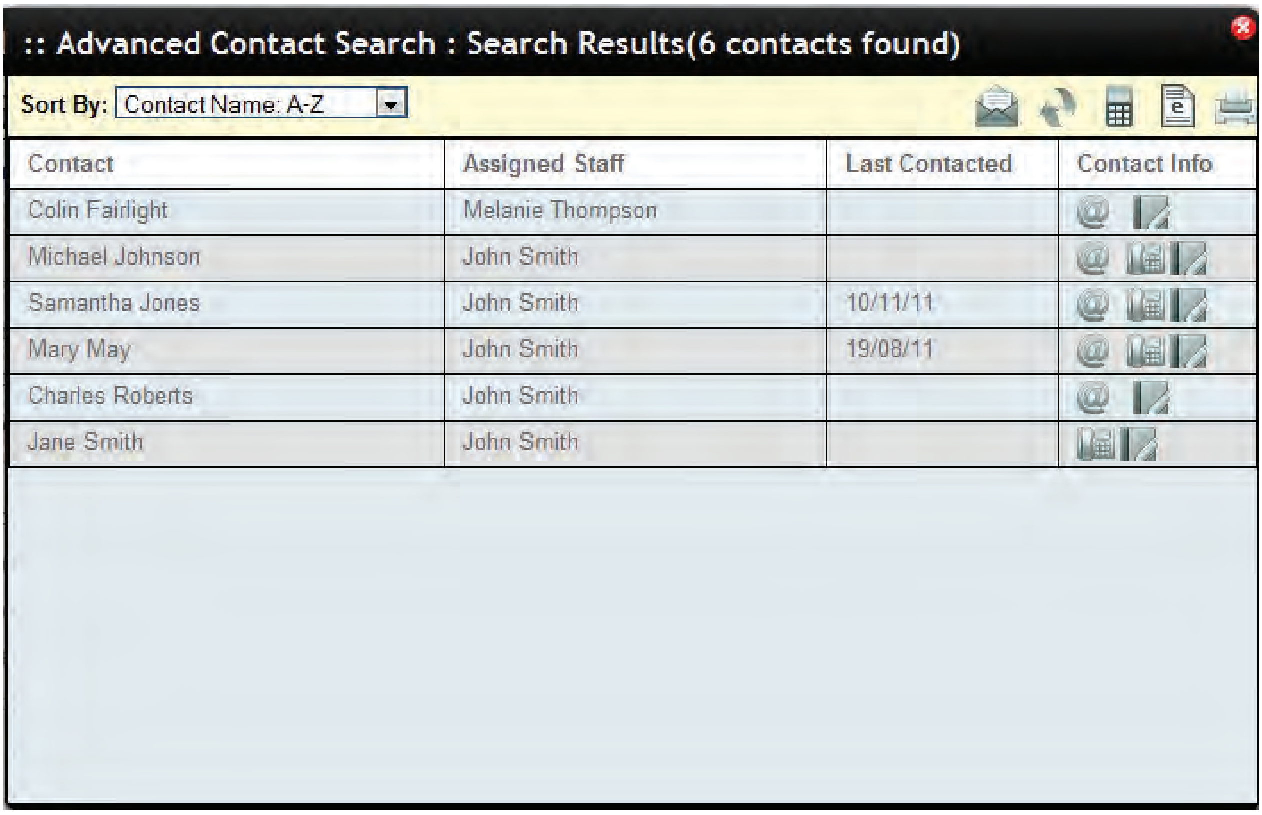
- Through a property card
- Through the Fast Finds Results Panel

Property Card

1. Search for your Property and open the Property Card

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

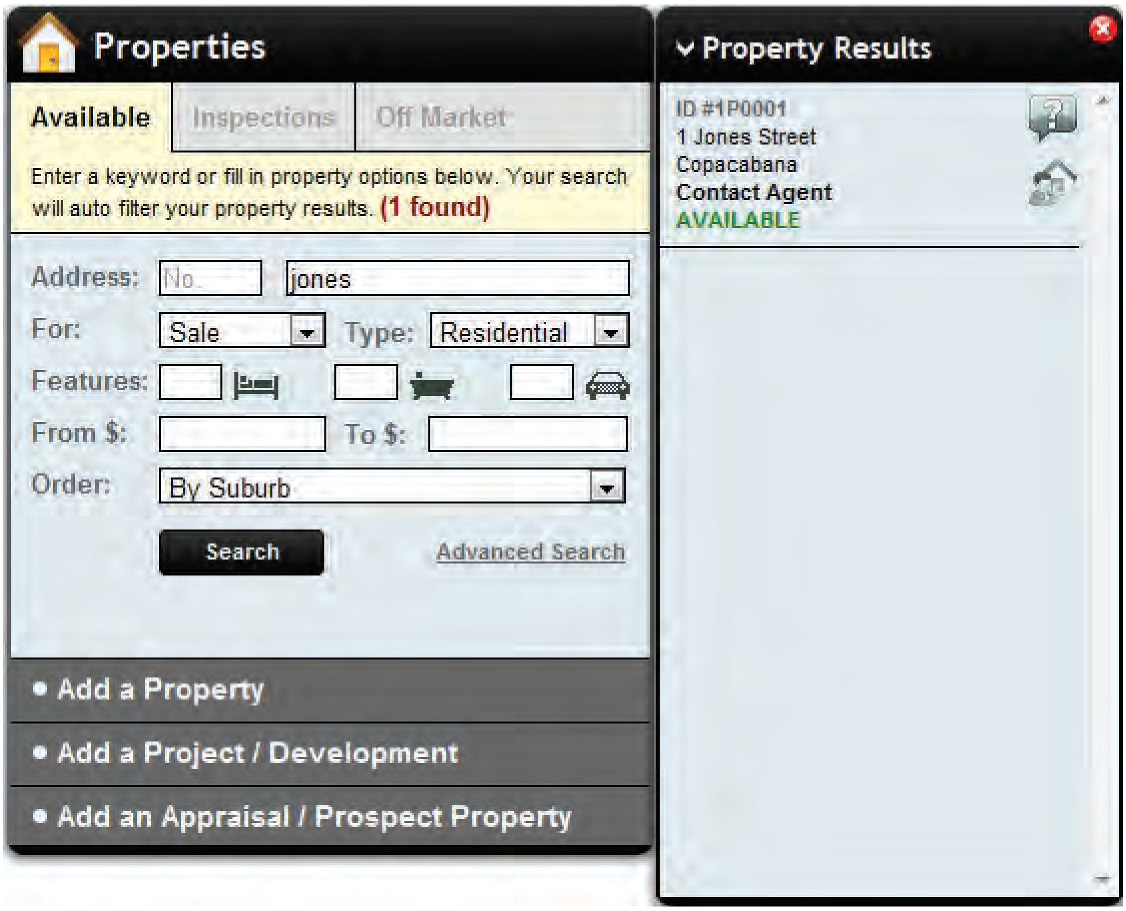
4. A list of Contacts who's requirements match the property will open in a new panel



Fast Finds Results Panel

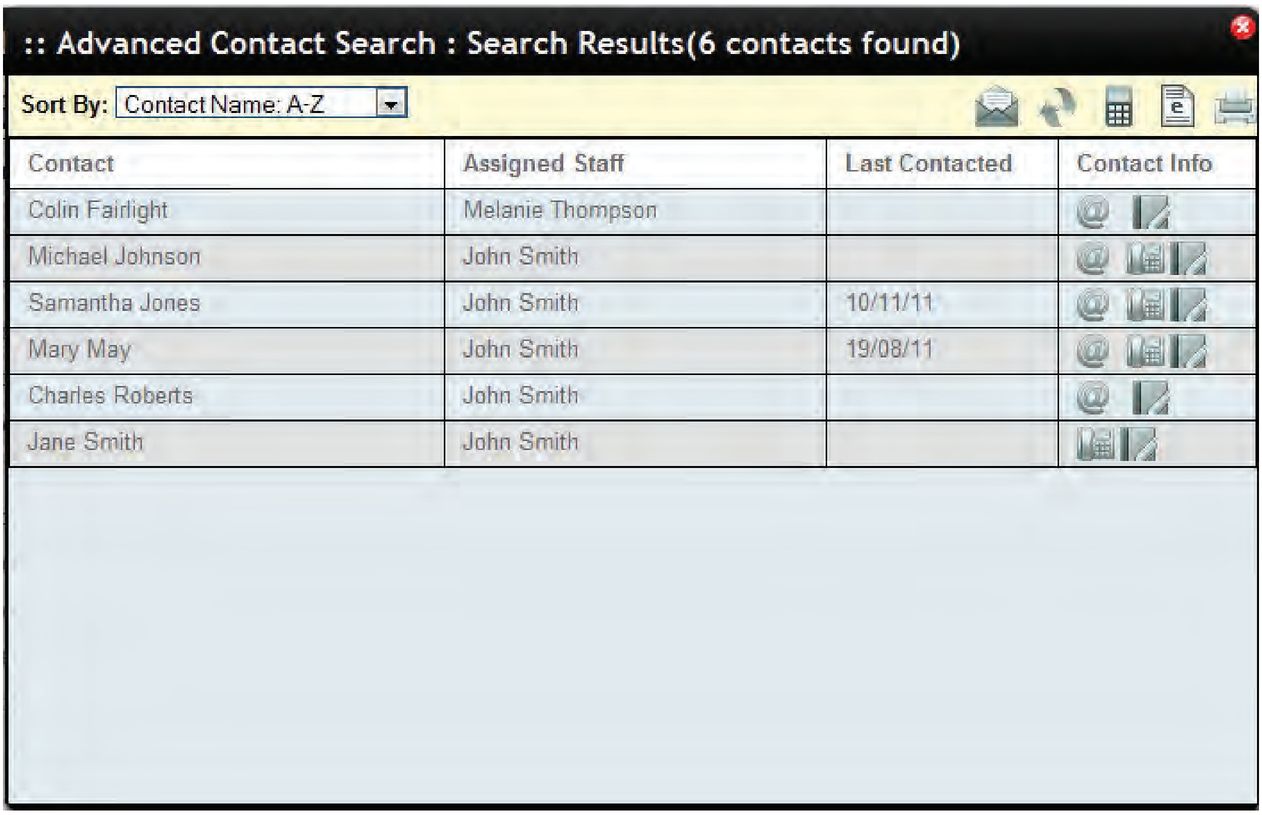
1. Click on Properties from the main menu

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



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

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



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

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

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

Appointment Inspection

How do I enter feedback after an Appointment Inspection?

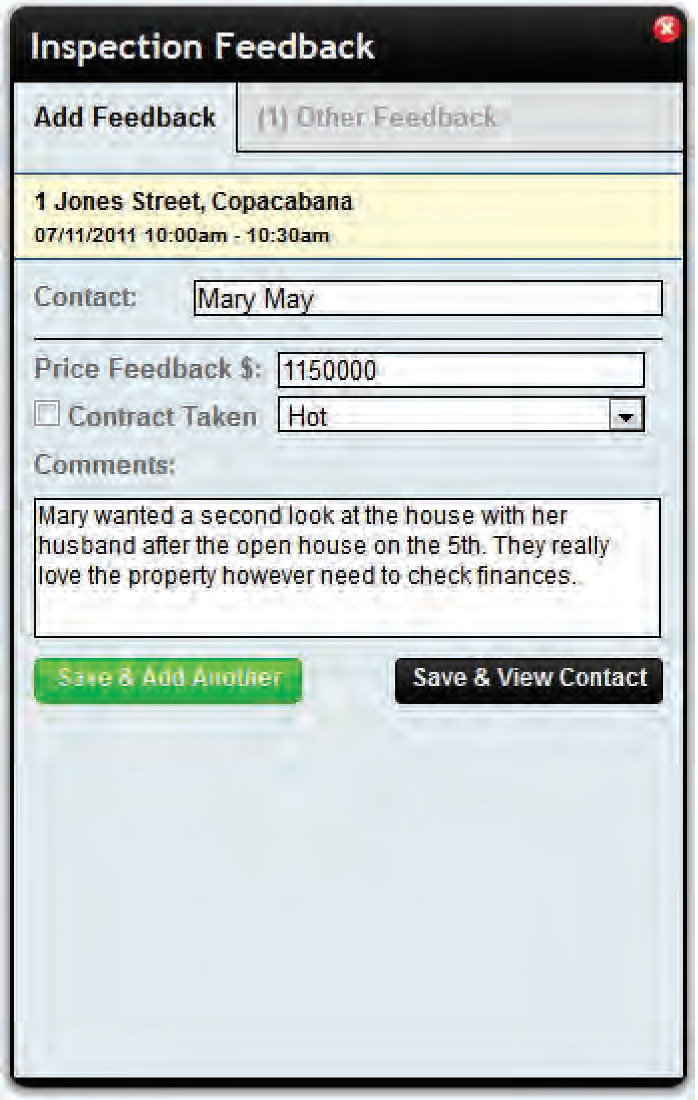
1. Search for your Property and open the Property Card

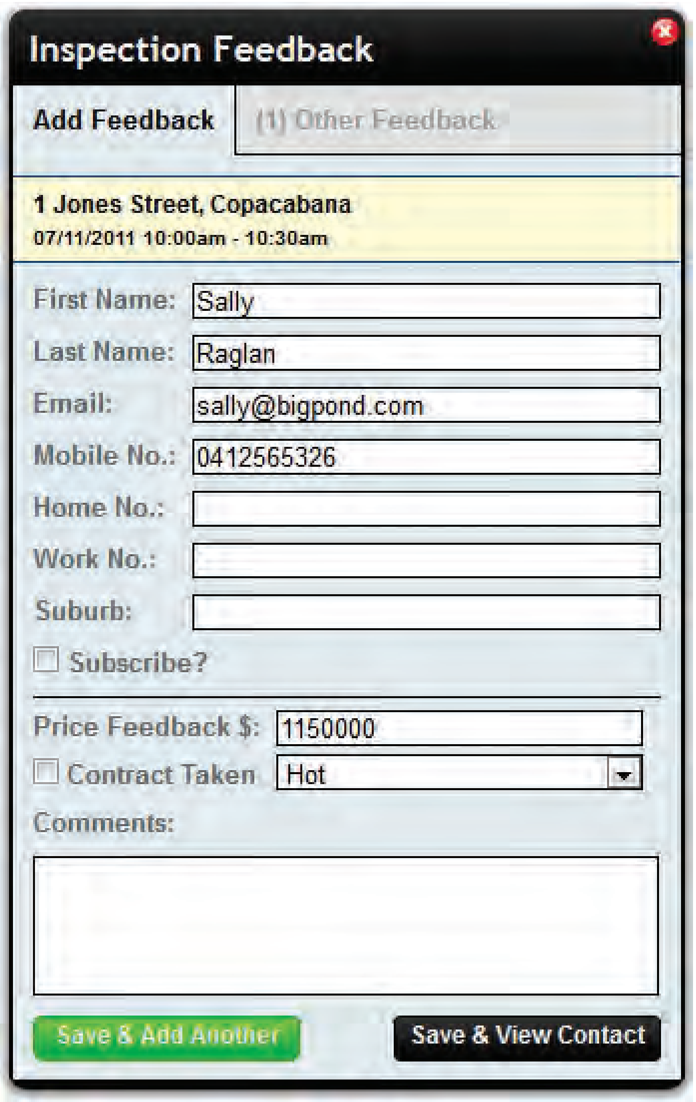
2. Click on the Add Feedback by Appointment action icon 

3. Enter the date and time of the inspection

4. The right panel will open

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


Inspection Feedback
Add Feedback
(1) Other Feedback
1 Jones Street, Copacabana
07/11/2011 10:00am - 10:30am
Contact:
Mary May
Price Feedback $:
1150000
Contract Taken
Hot
Comments:
Mary wanted a second look at the house with her husband after the open house on the 5th. They really love the property however need to check finances.
Save & Add Another
Save & View Contact



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

Add a Note

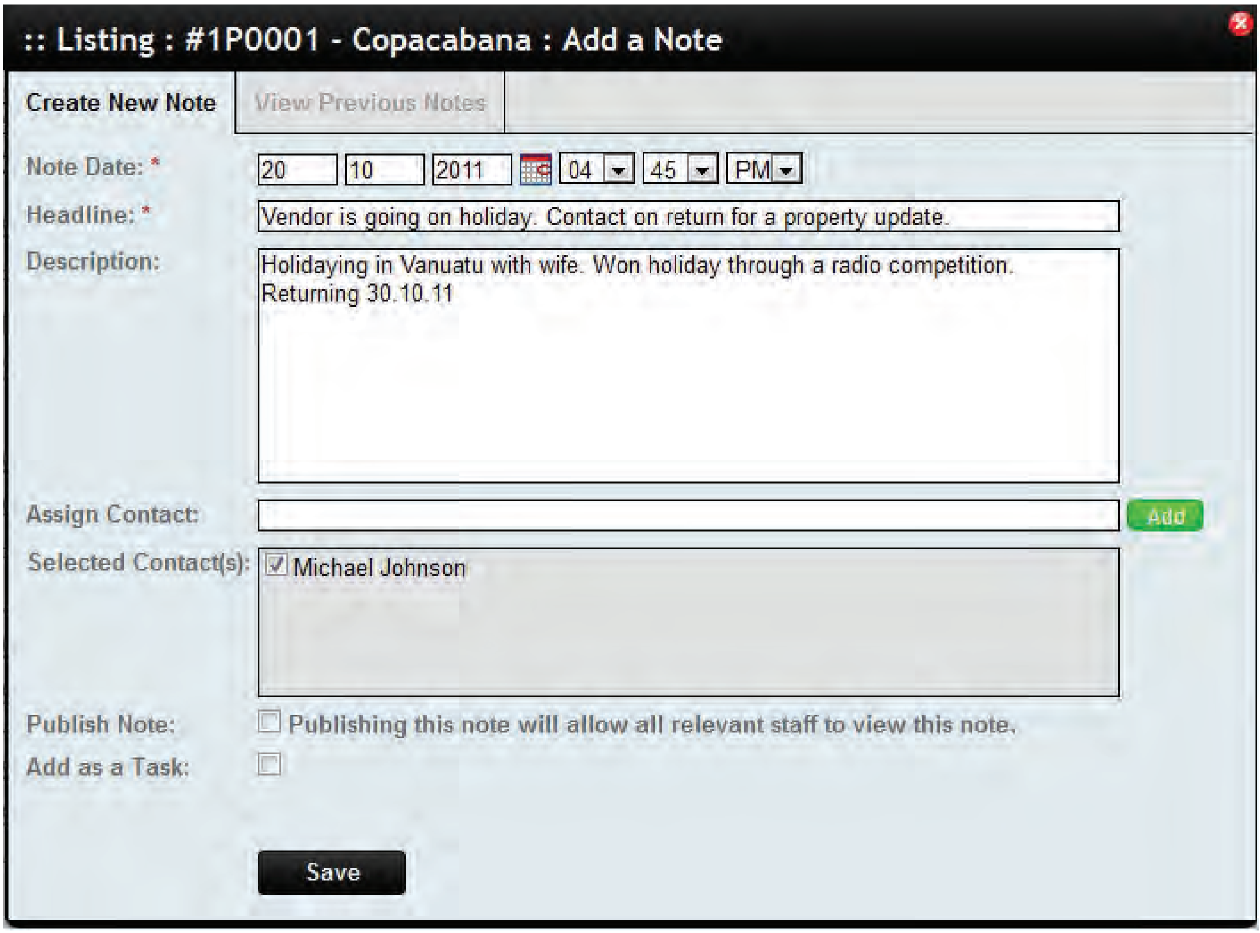
How do I add a note against a property?

1. Search for your Property and open the Property Card

2. Click on Add a Note action icon 

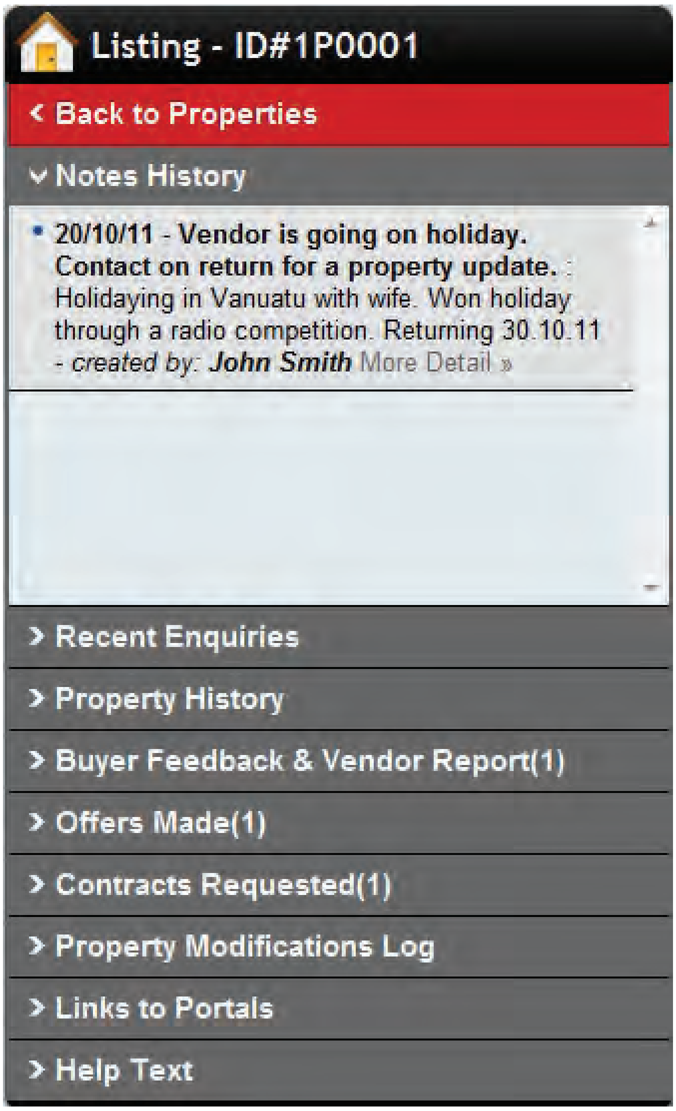
3. Enter the note Headline & Description

4. Assign a Contact if applicable



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

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



See also...

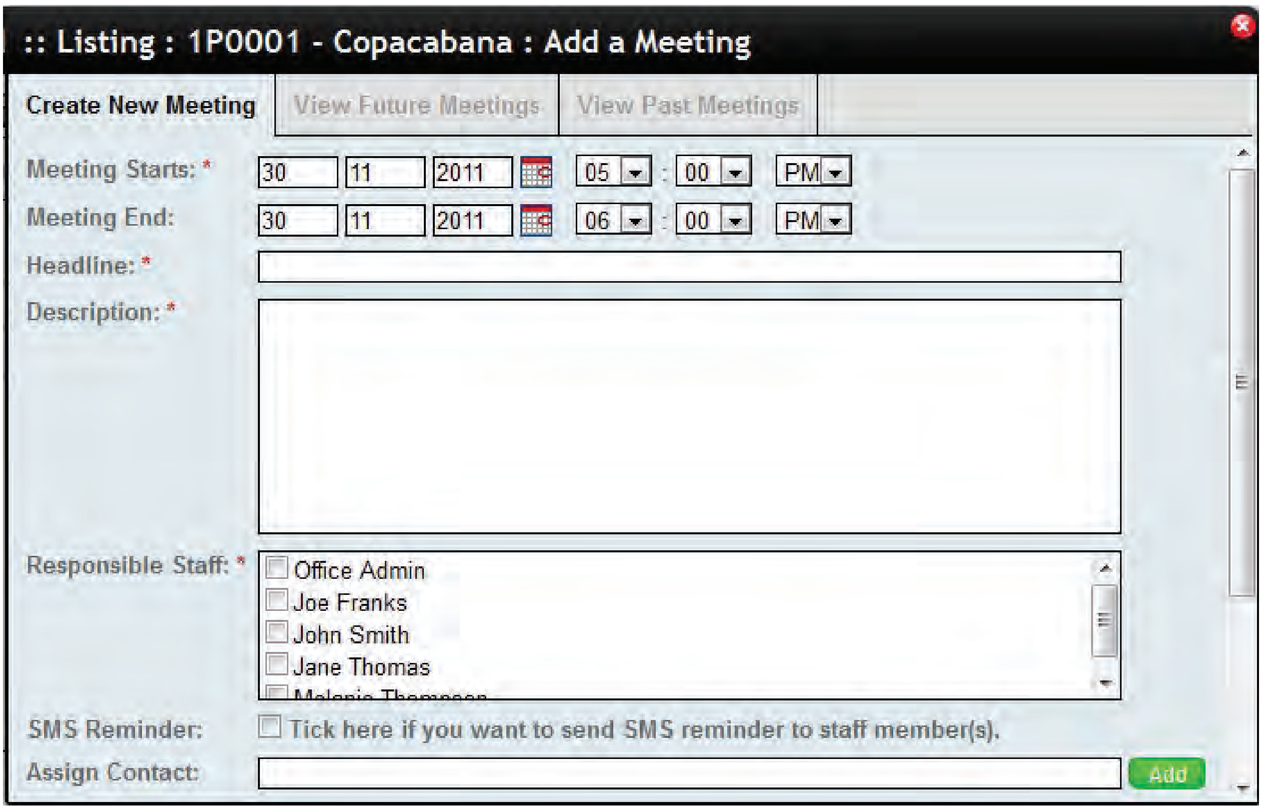
Notes History

Add a Meeting

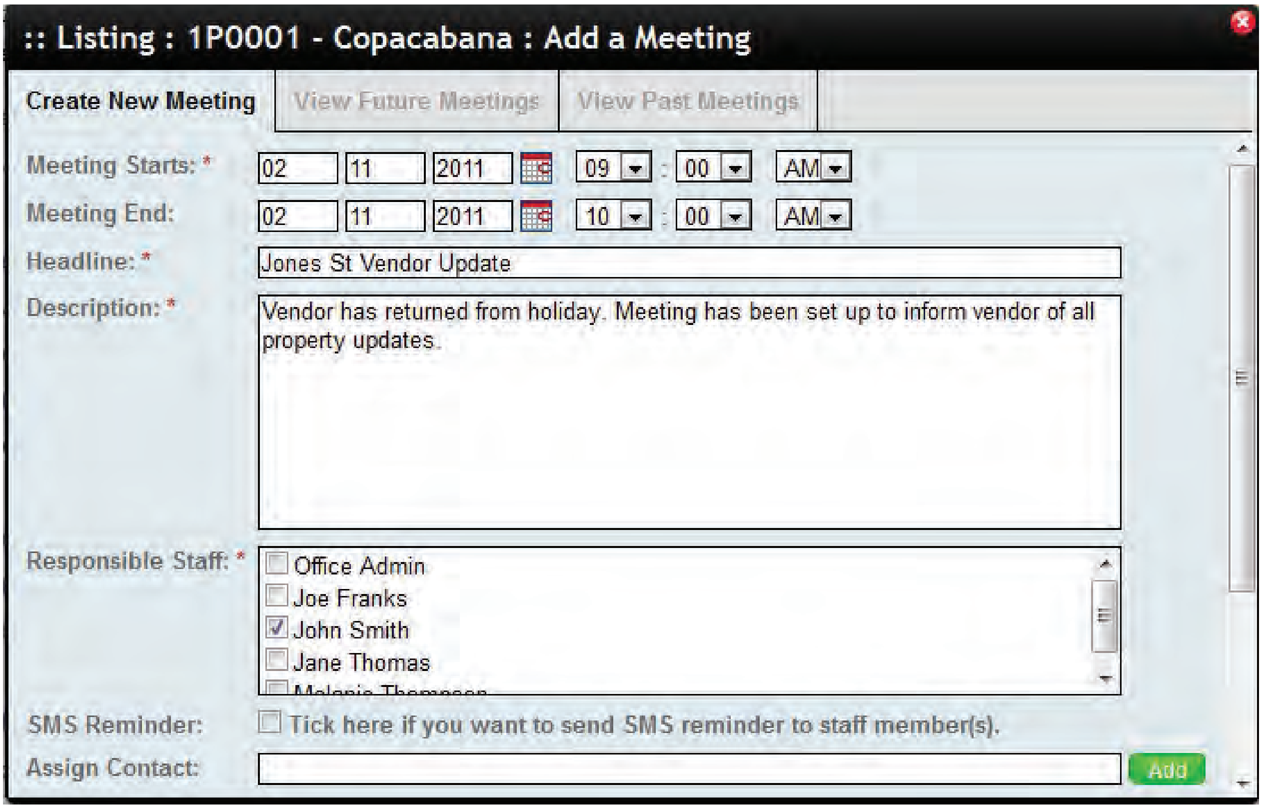
How do I Add a Meeting from a Property in Agentbox?

1. Search for your Property and open the Property Card

2. Click on Add a Meeting action icon 

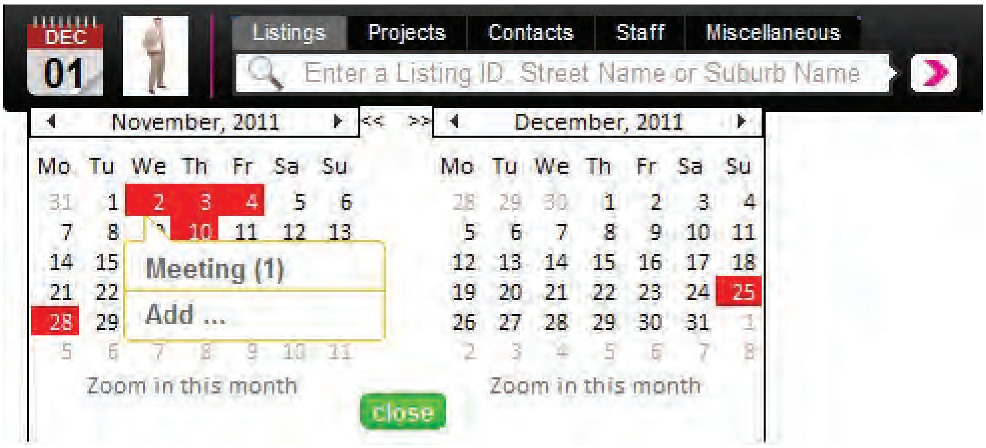


3. Enter Meeting time, Heading, Description, Staff and assign Contact (if applicable).



4. Click on Save

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

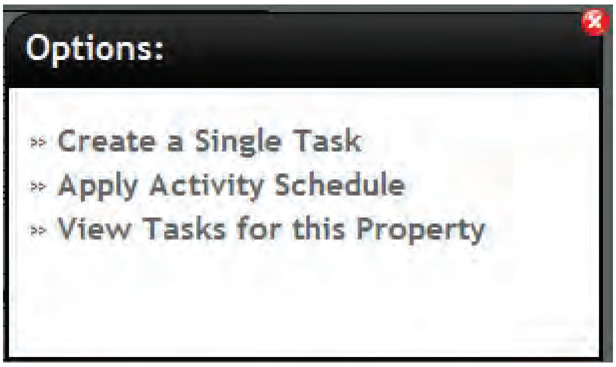


Tasks & Activity Schedules

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

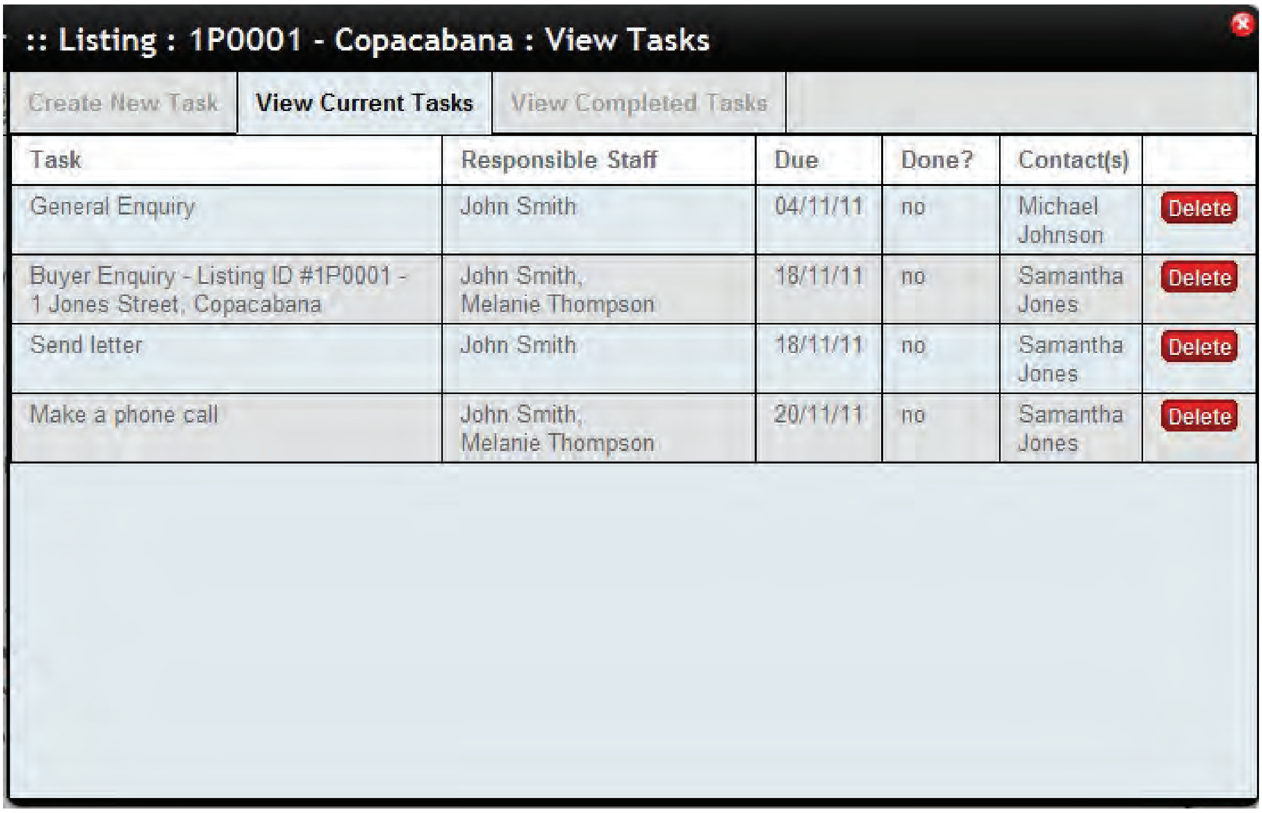
1. Search for your Property and open the Property Card

2. Click on the 'Tasks' icon 



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

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



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

Send a Letter to Property Contacts

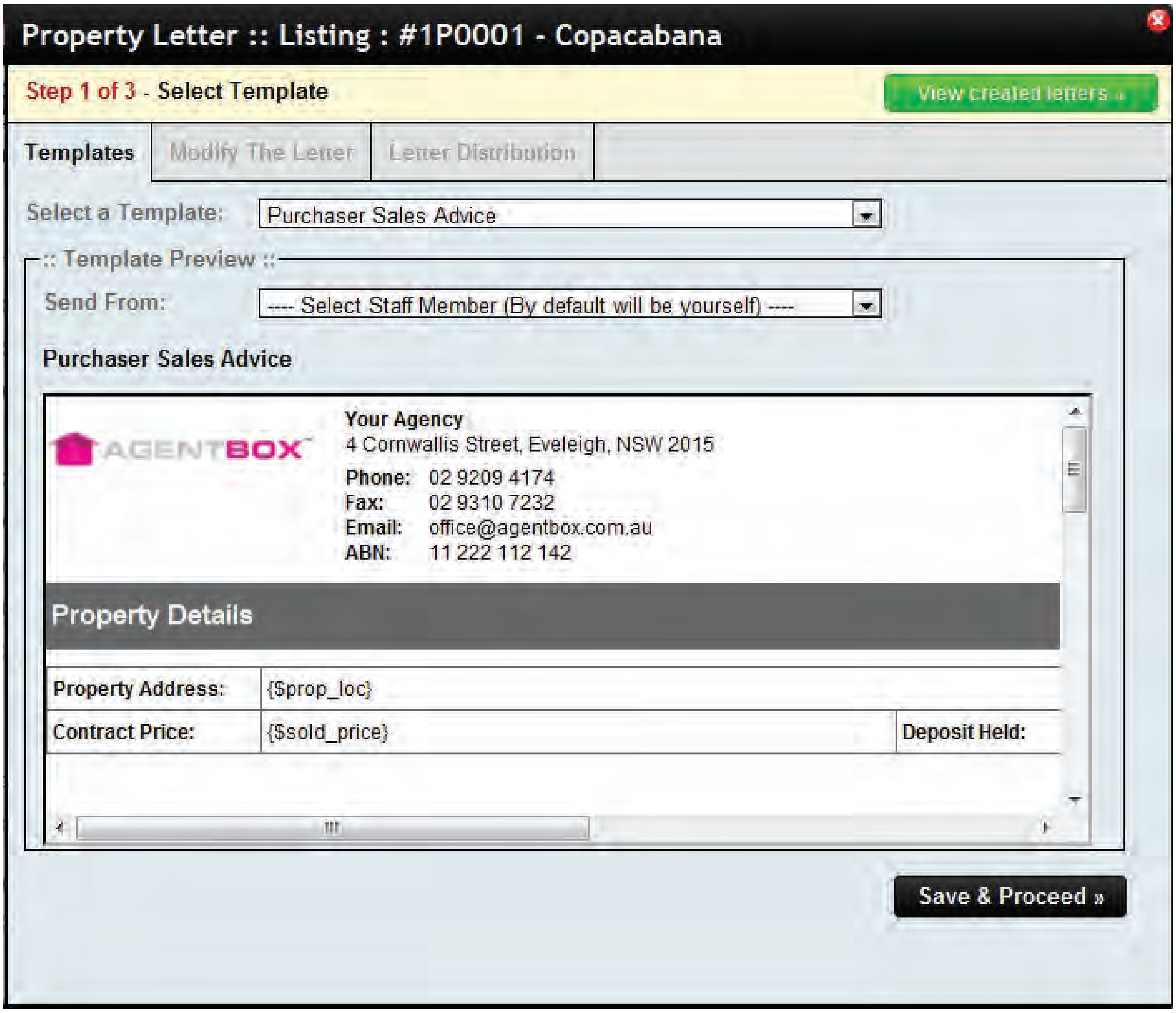
How do I send a Letter via a property?

1. Search for your Property and open the Property Card

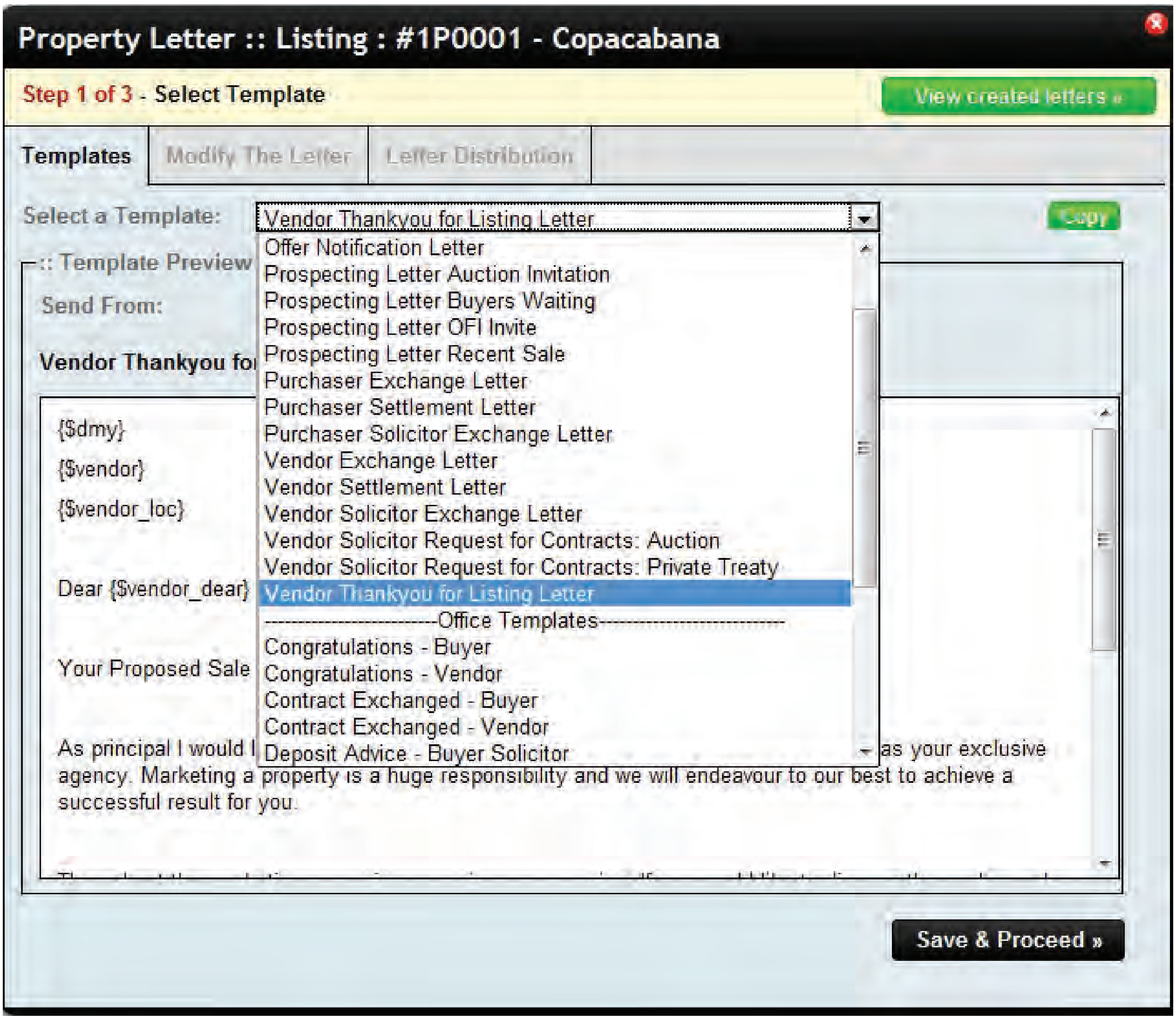
2. Ensure the contacts used in the template e.g. Vendor, Vendor Solicitor, Buyer and Buyer Solicitor have been added to the property via the Agents & Contacts tab

3. Ensure all the property information e.g. price or date fields that are included in the letter variables (or merge fields) are added to the property.

4. Click the Letter Generator action icon 



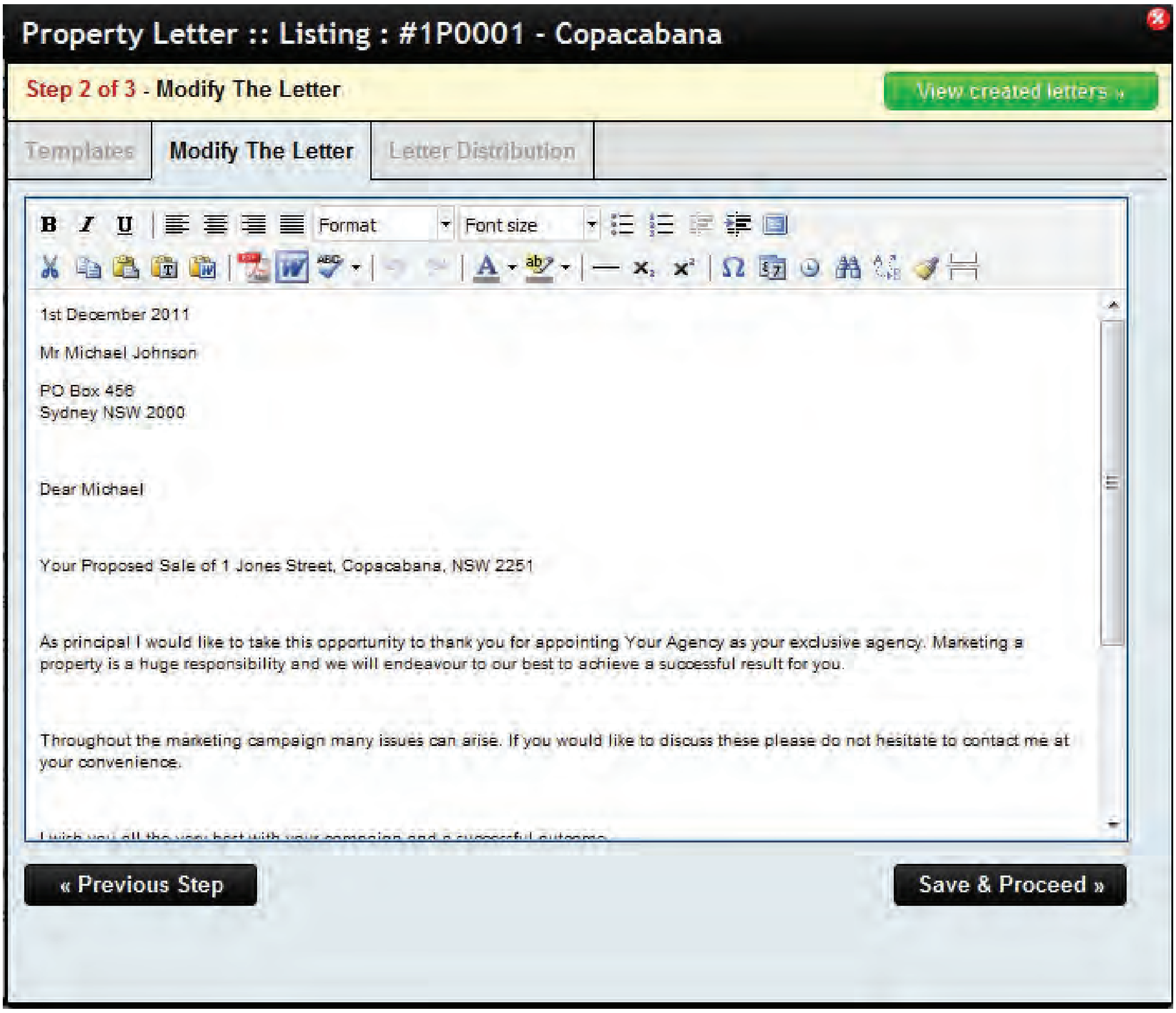
5. Select the Template from the Select a Template drop down.



5. Click Save & Proceed.

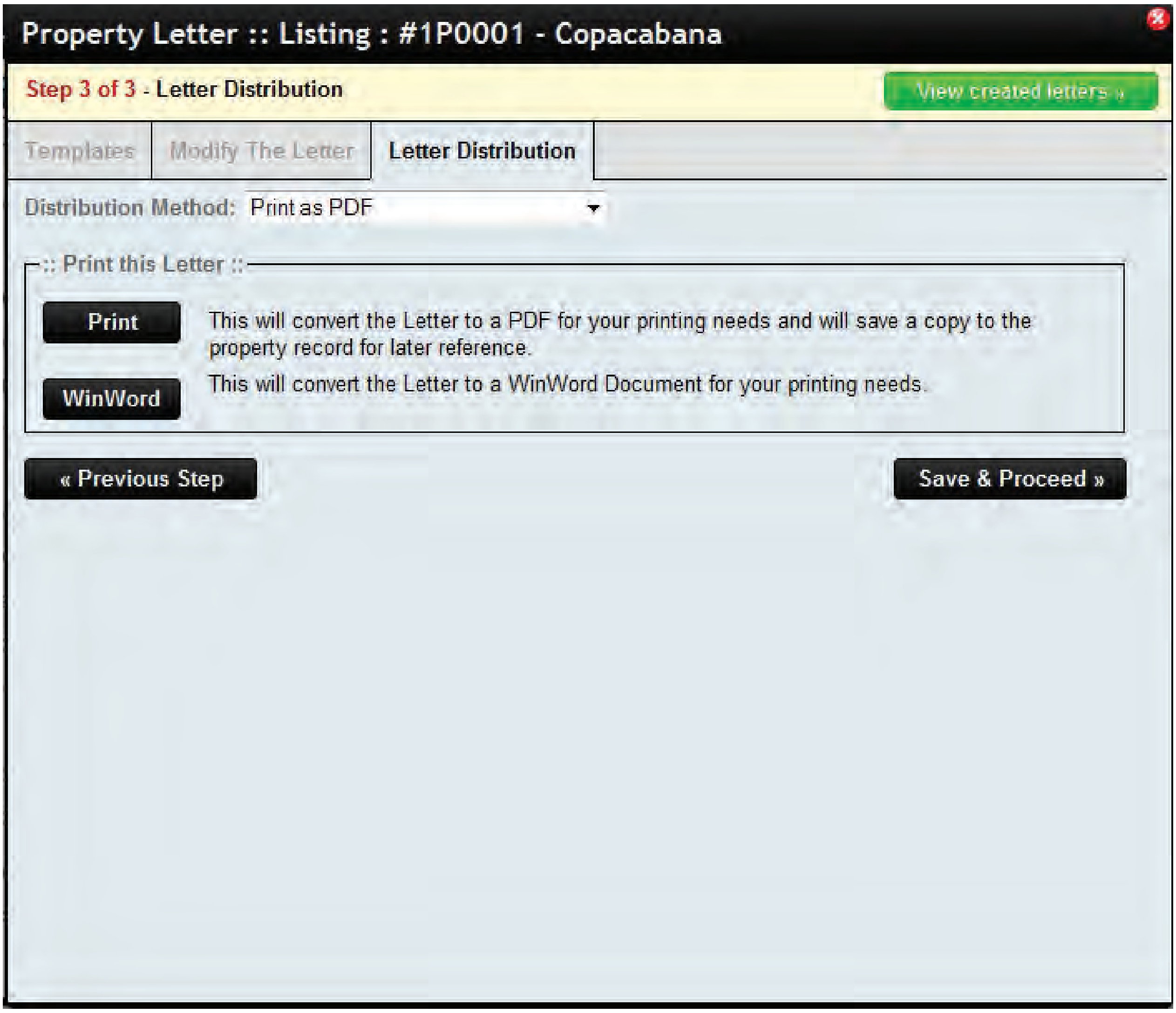
6. You can now modify the contents of the letter. The contact and property details e.g. names, address', dates and prices should be pulled from the contact cards and the property data. However, you can manually complete any missing information or adjust the contents of the letter at this point without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

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

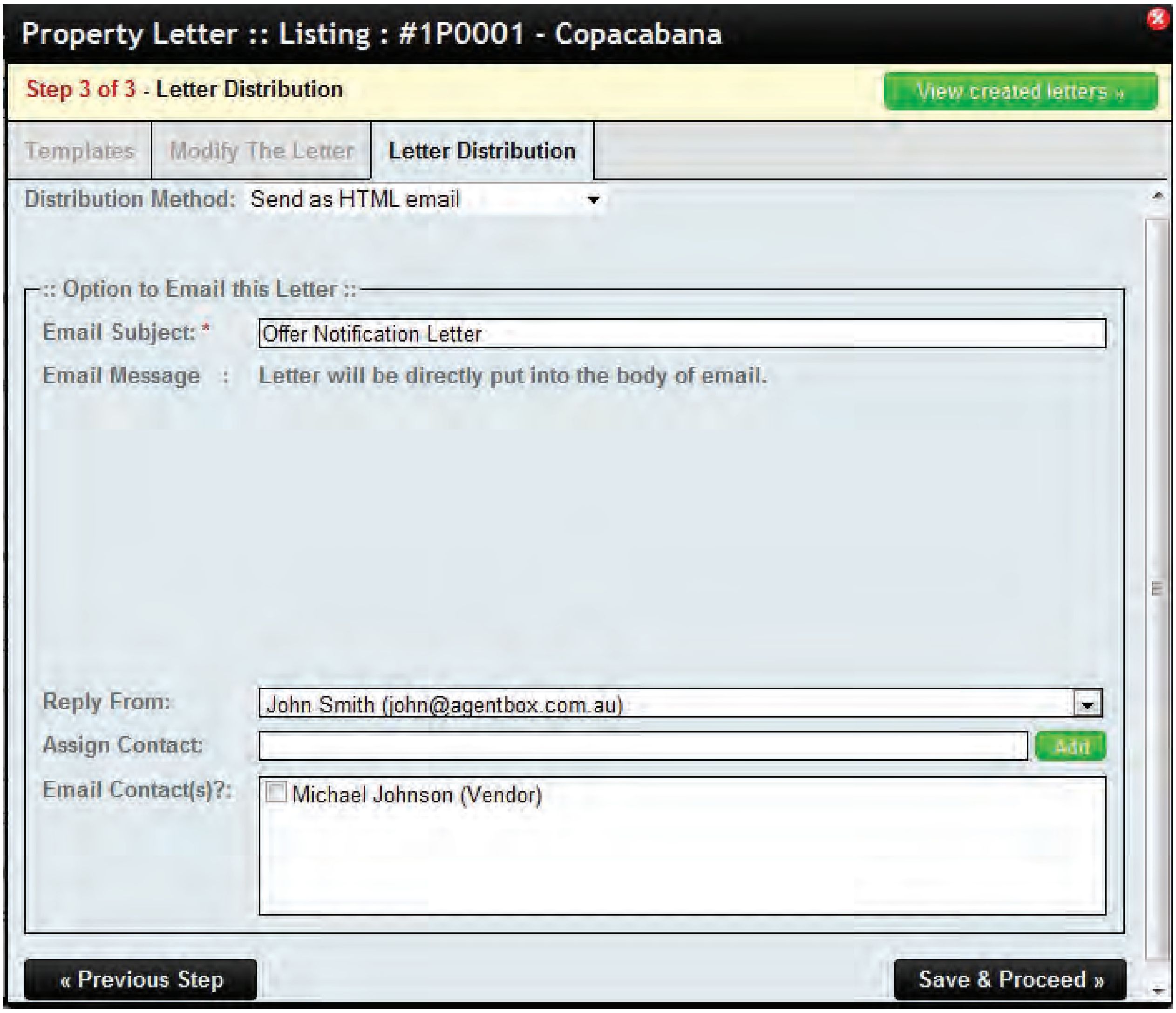


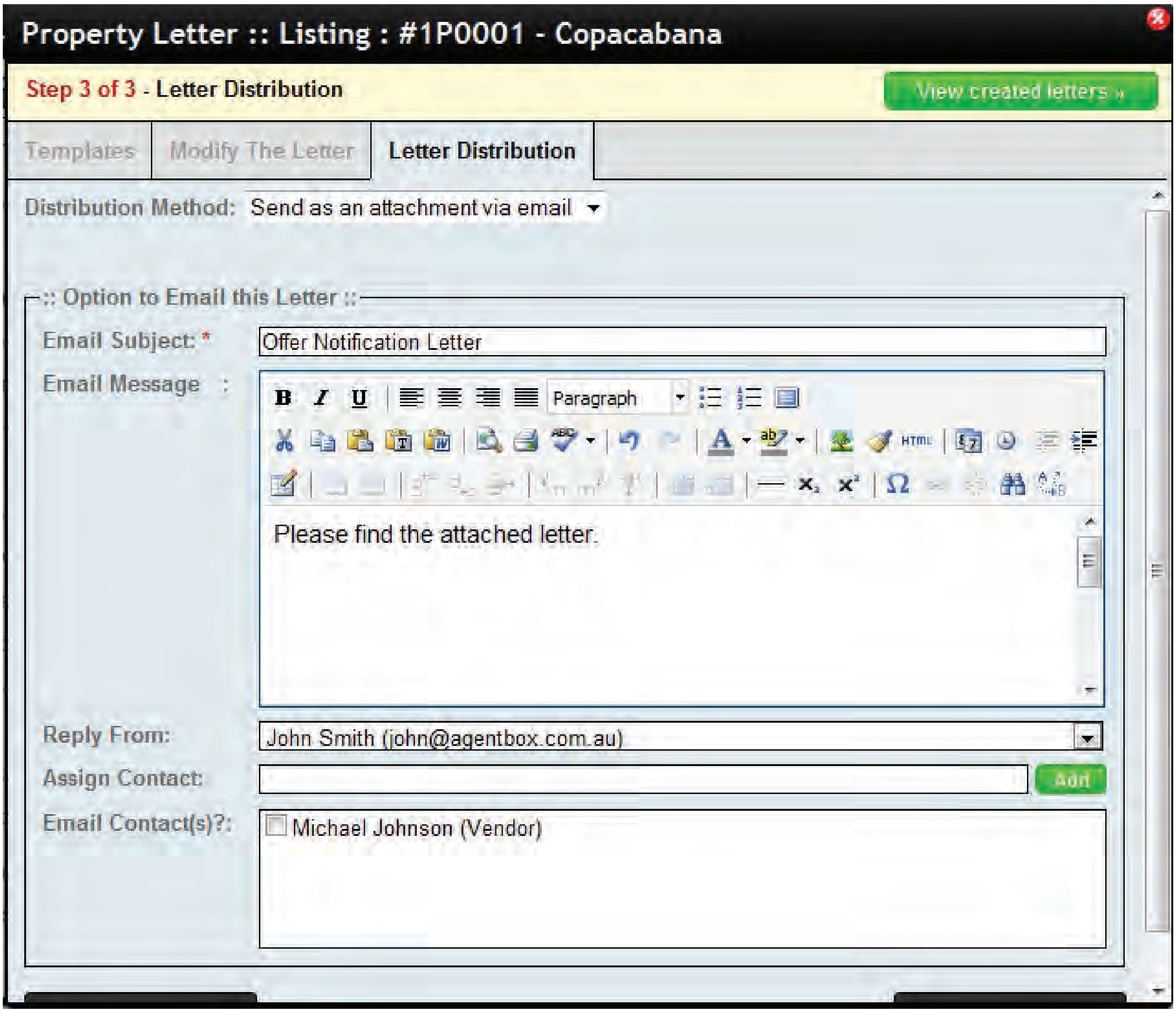
7. Click Save & Proceed

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



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
Step 3 of 3 - Letter Distribution
View created letters »
Templates
Modify The Letter
Letter Distribution
Distribution Method: Send as HTML email
:: Option to Email this Letter ::
Email Subject: *
Offer Notification Letter
Email Message : Letter will be directly put into the body of email.
Reply From:
John Smith (john@agentbox.com.au)
Assign Contact:
Add
Email Contact(s)?:
Michael Johnson (Vendor)
« Previous Step
Save & Proceed »



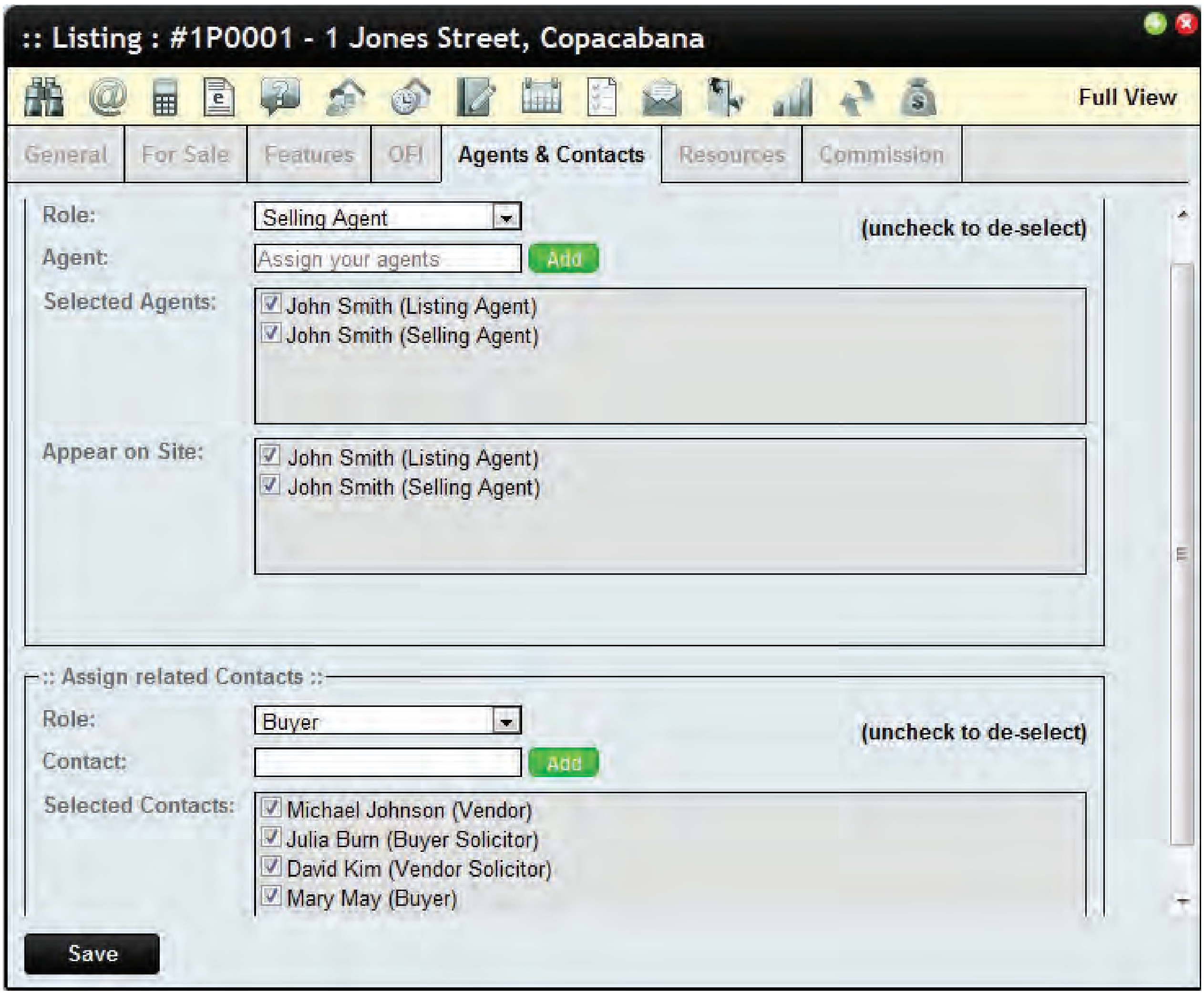
You may also like...
[How do I create a letter template?]
[How do I conduct a mail merge?]

Sales Advice

How do I generate a Sales Advice document?

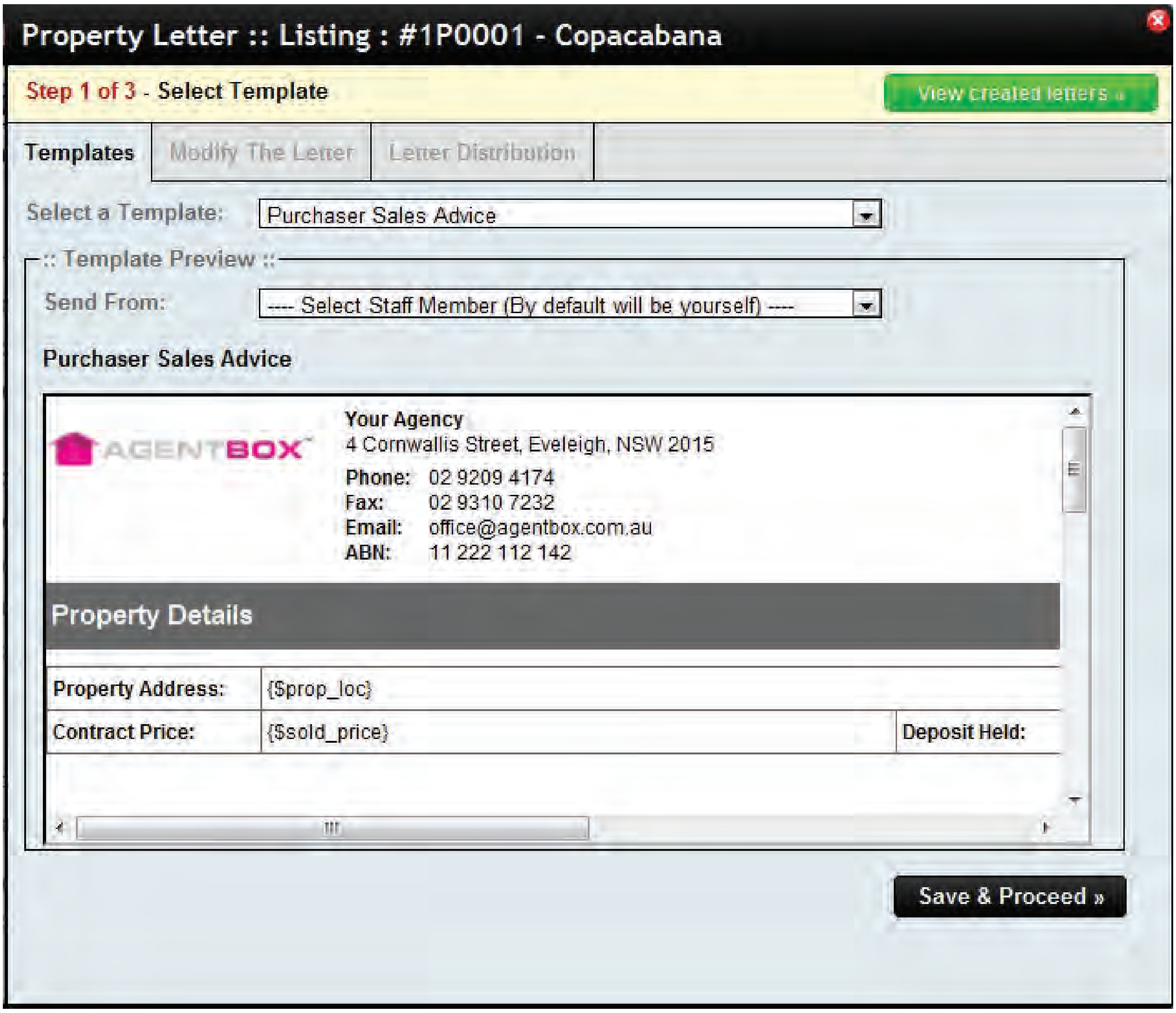
1. Search for your Property and open the Property Card

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.



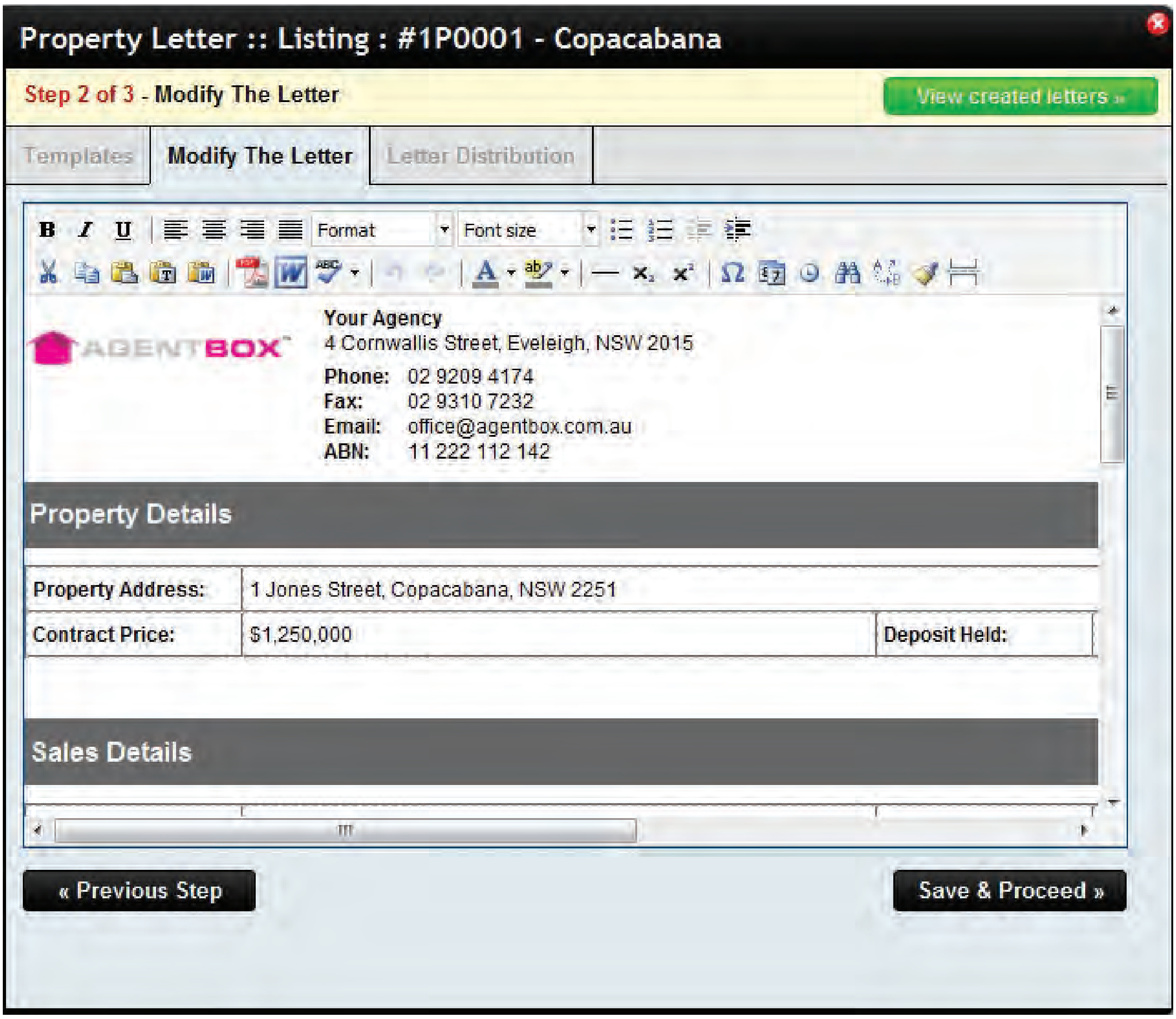
3. Click the Letter Generator action icon 

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.



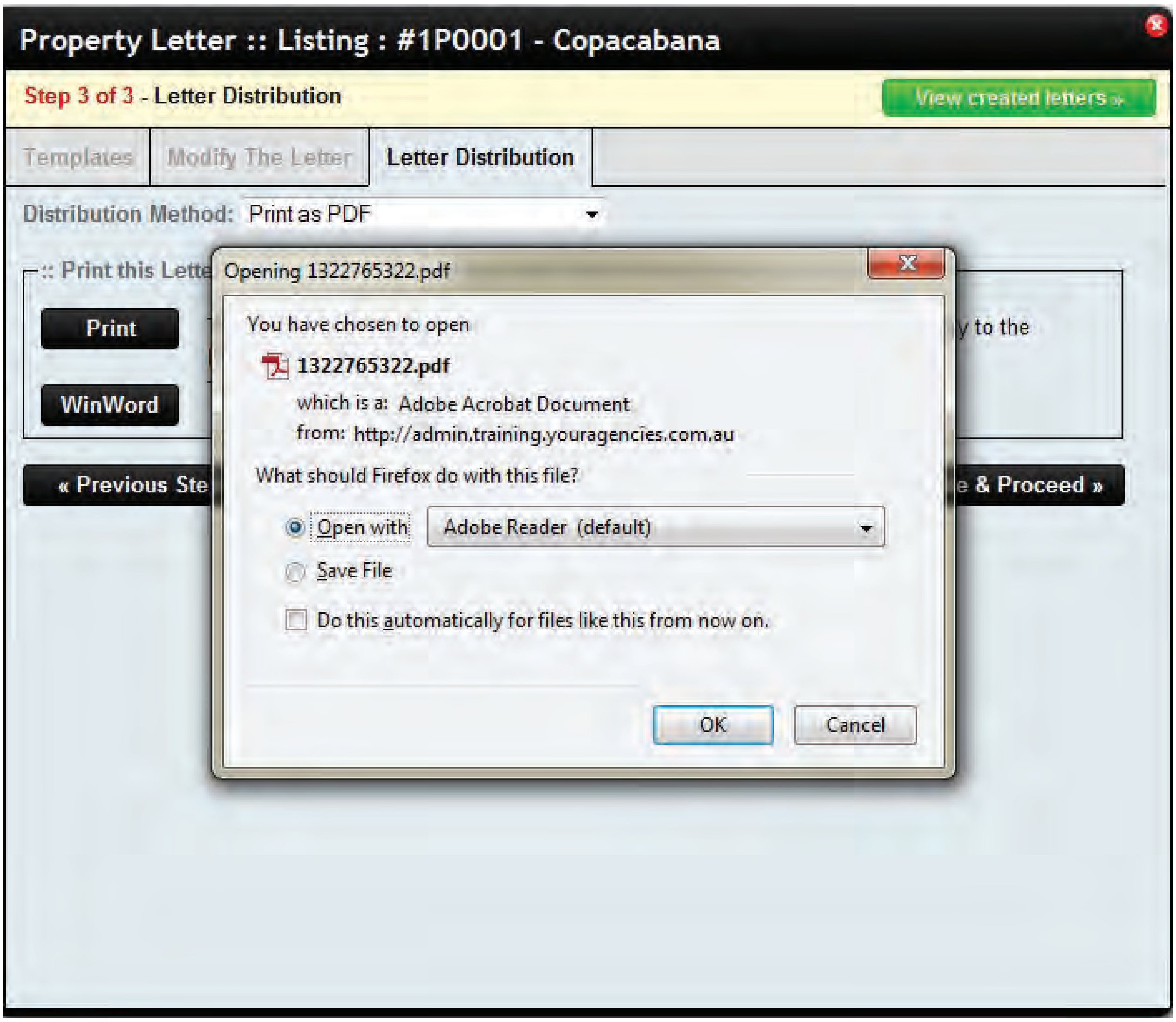
5. Click Save & Proceed.

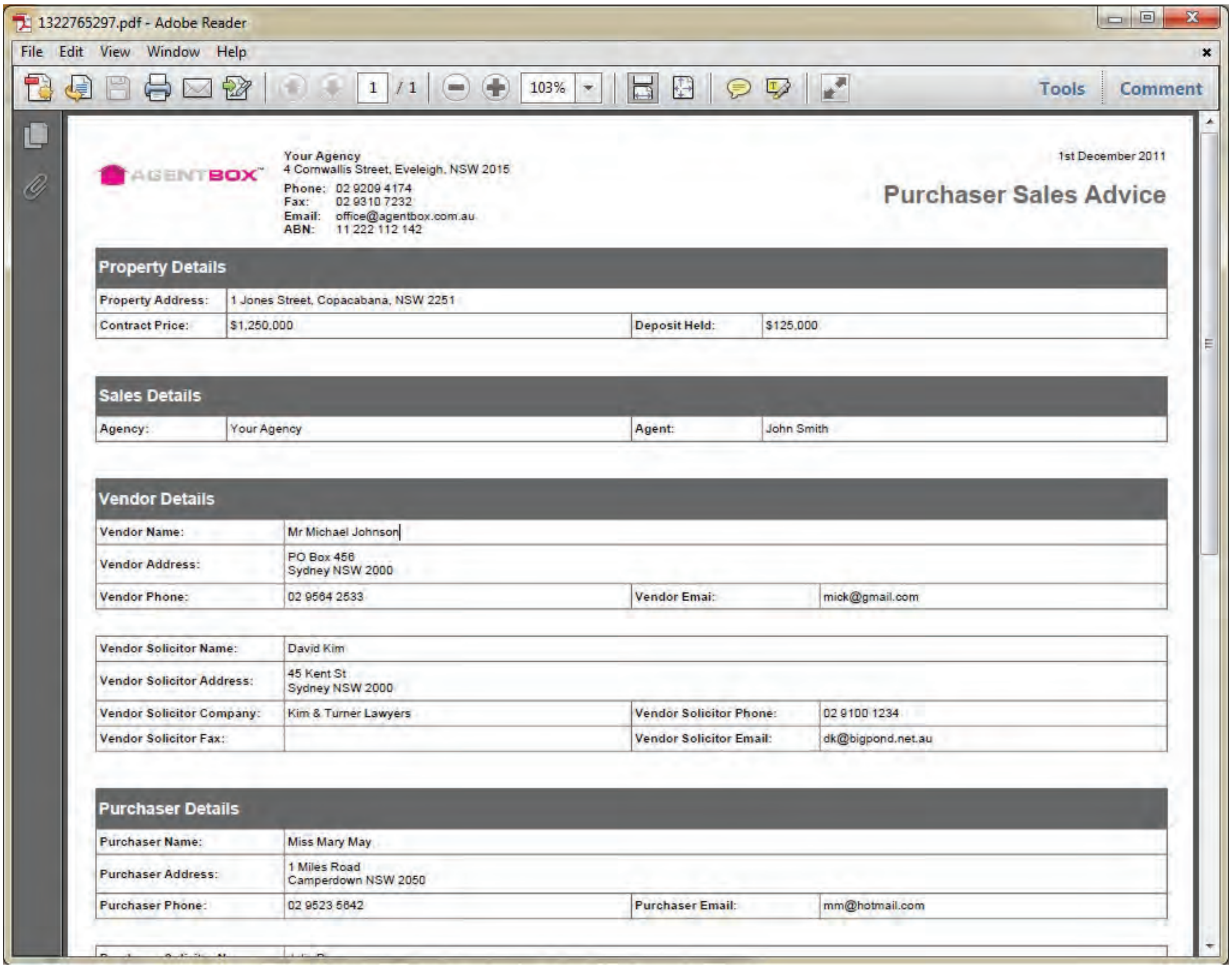
6. You can now modify the contents of the letter. By default, the contact details, sale price etc should be pulled from the contact cards and the property status. However, you can manually complete any missing information or adjust the contents of the letter at this point. All missing Variable data is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



7. Click Save & Proceed

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


Property Letter :: Listing : #1P0001 - Copacabana
Step 3 of 3 - Letter Distribution
View created letters »
Templates
Modify The Letter
Letter Distribution
Distribution Method: Print as PDF
:: Print this Lette
Print
WinWord
« Previous Ste
e & Proceed »
y to the
Opening 1322765322.pdf
You have chosen to open
1322765322.pdf
which is a: Adobe Acrobat Document
from: http://admin.training.youragencies.com.au
What should Firefox do with this file?
Open with
Adobe Reader (default)
Save File
Do this automatically for files like this from now on.
OK
Cancel



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

1st December 2011

Purchaser Sales Advice

Property Details

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

Sales Details

Agency:	Your Agency	Agent:	John Smith

Vendor Details

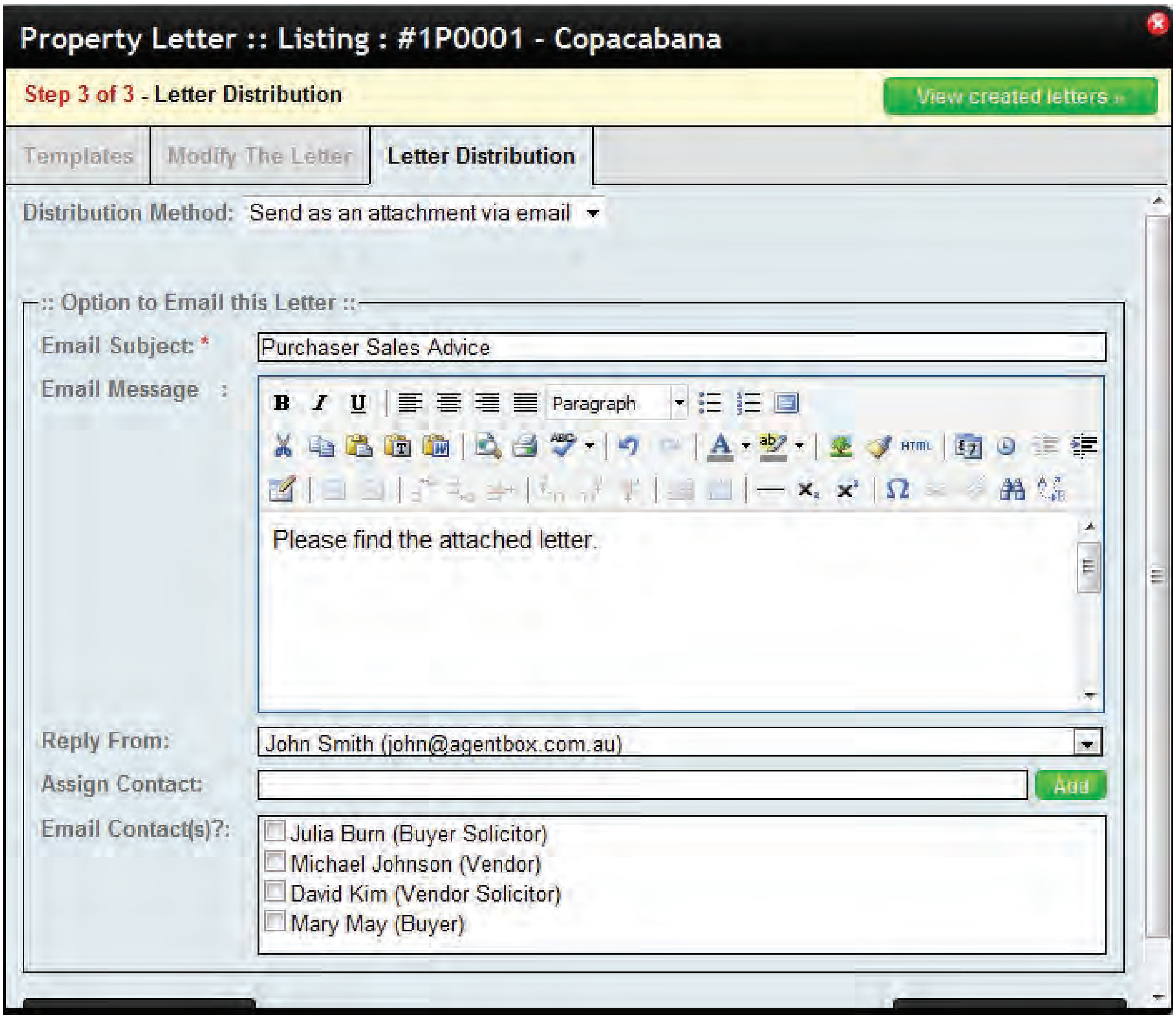
Vendor Name:	Mr Michael Johnson		
Vendor Address:	PO Box 456 Sydney NSW 2000		
Vendor Phone:	02 9564 2533	Vendor Emai:	mick@gmail.com

Vendor Solicitor Name:	David Kim		
Vendor Solicitor Address:	45 Kent St Sydney NSW 2000		
Vendor Solicitor Company:	Kim & Turner Lawyers	Vendor Solicitor Phone:	02 9100 1234
Vendor Solicitor Fax:		Vendor Solicitor Email:	dk@bigpond.net.au

Purchaser Details

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

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



You may also like...

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

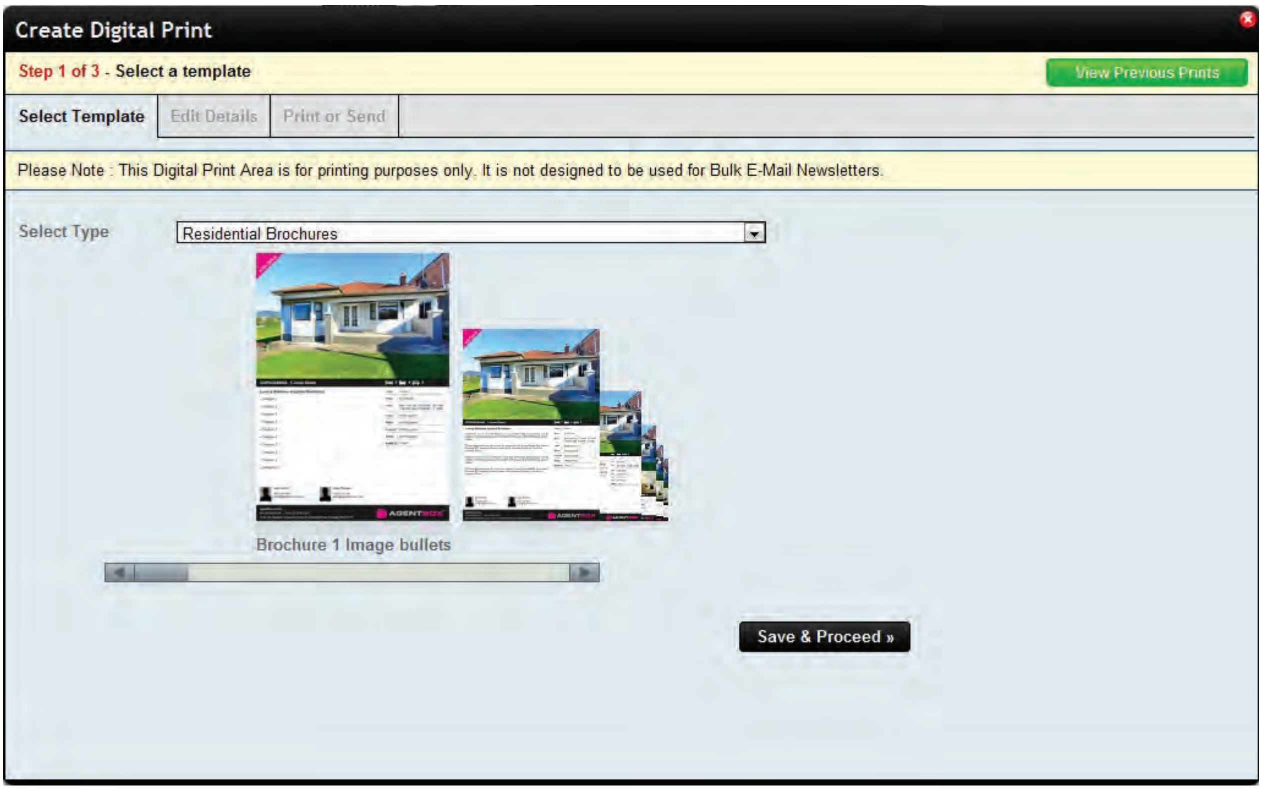
Create Digital Media

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

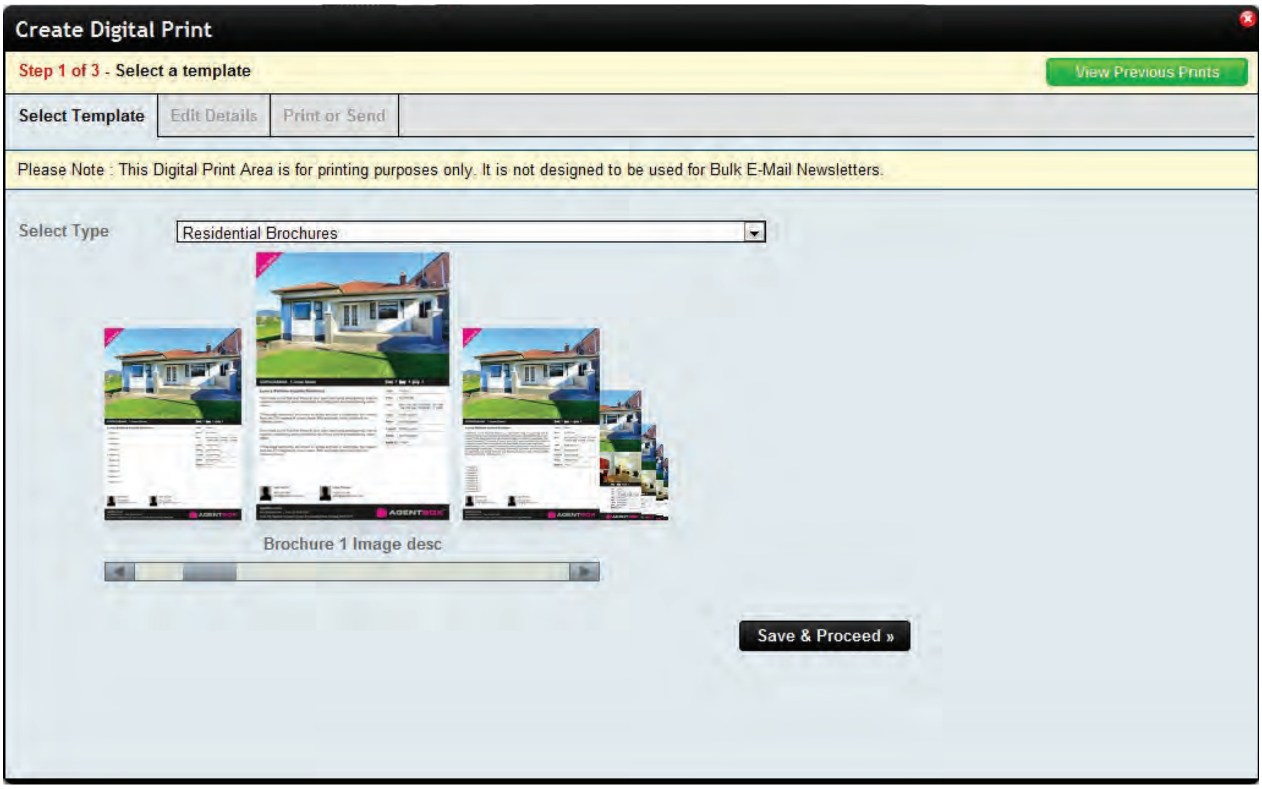
1. [Search for your Property](#) and open the [Property Card](#)

2. Click on the Create Media Action Icon 

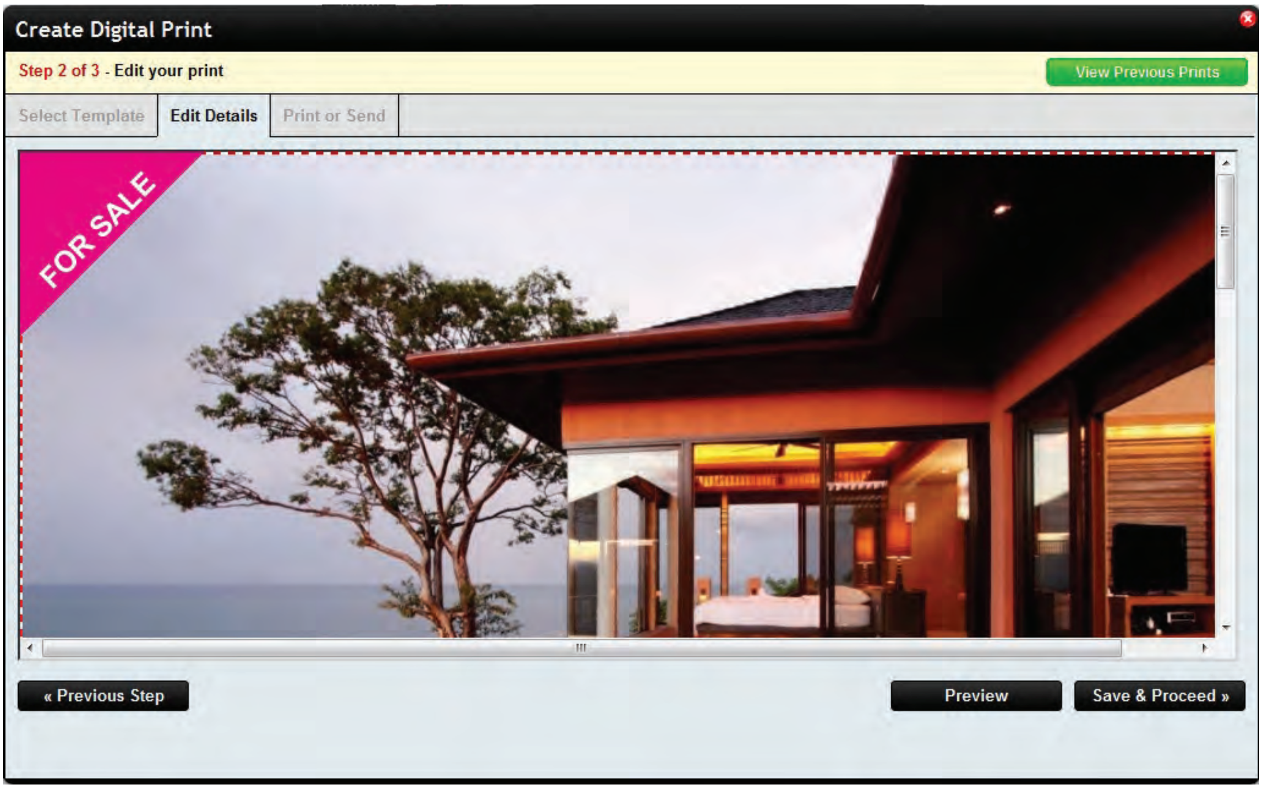
3. Click on the Select Type dropdown
In this example we are using an A4 Brochure
4. Click on A4 Brochure



5. Click on the required Template

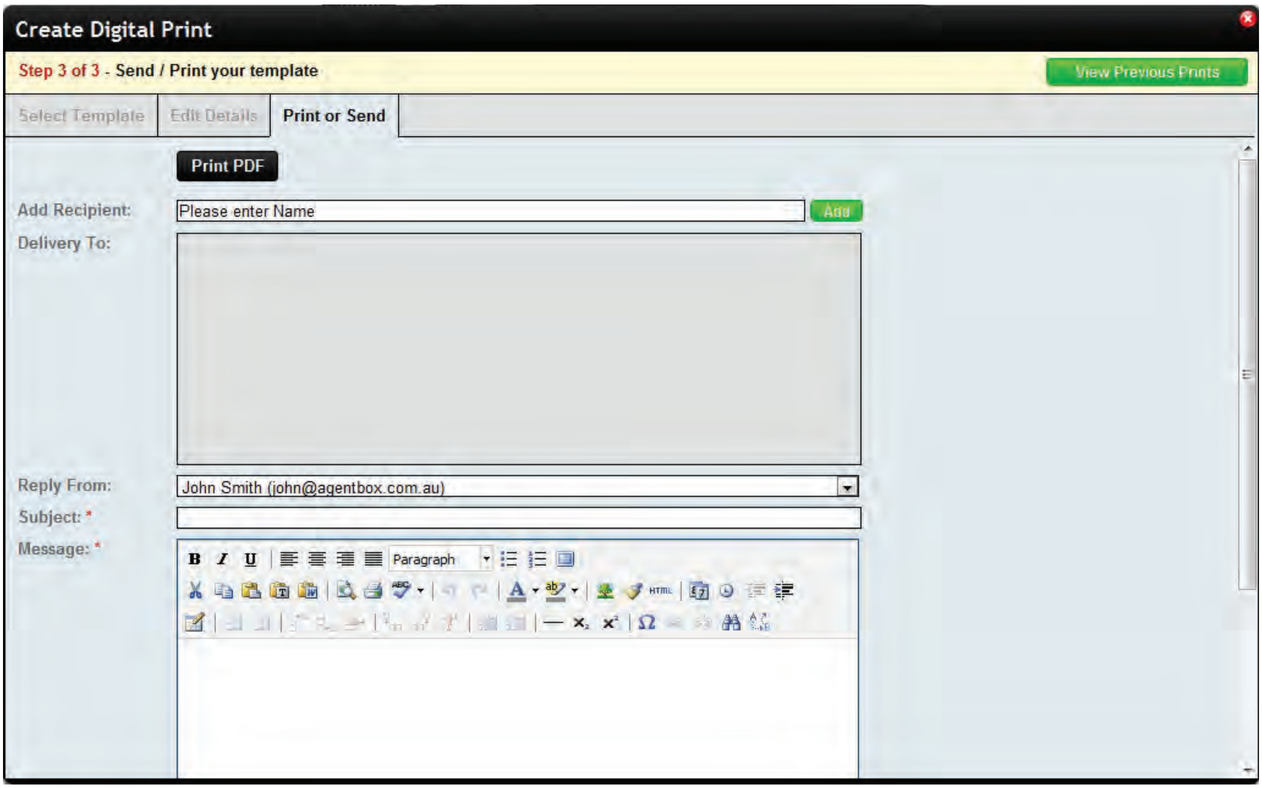


6. Click on Save & Proceed



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

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

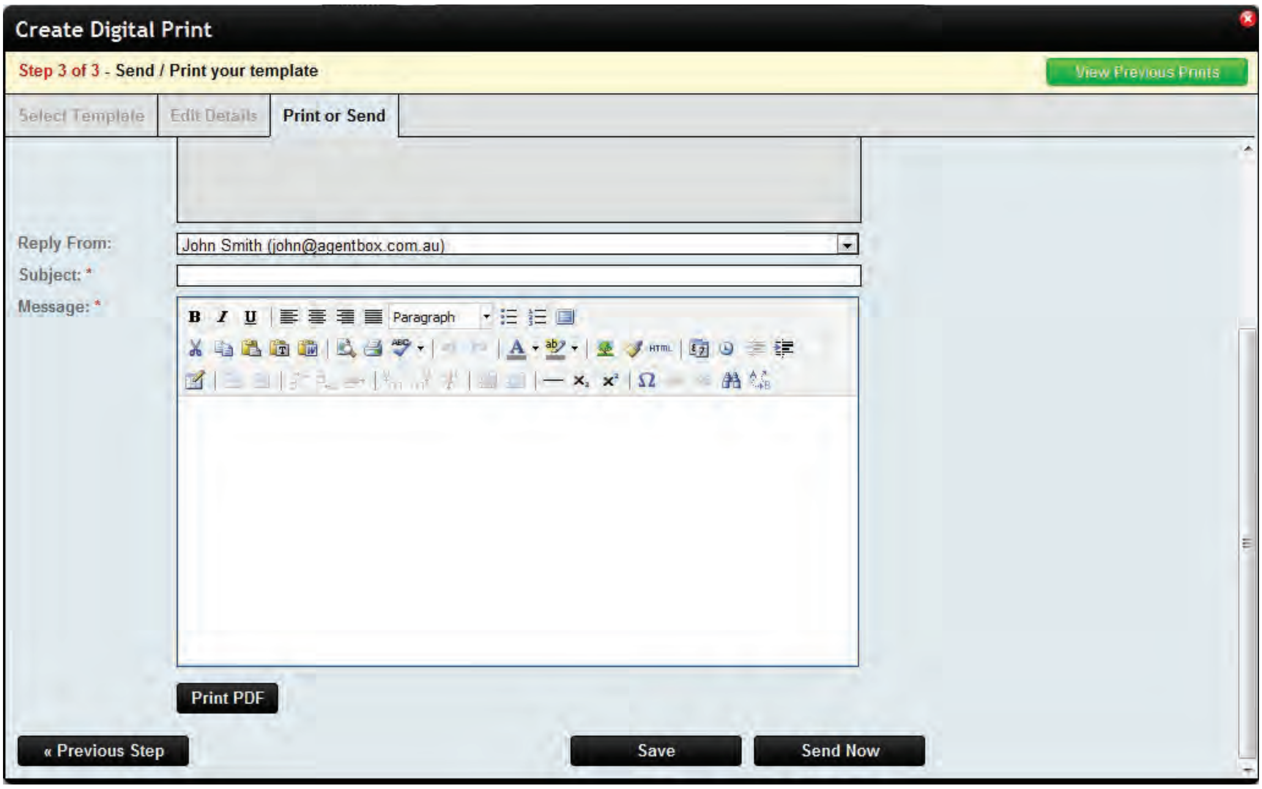


Either

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

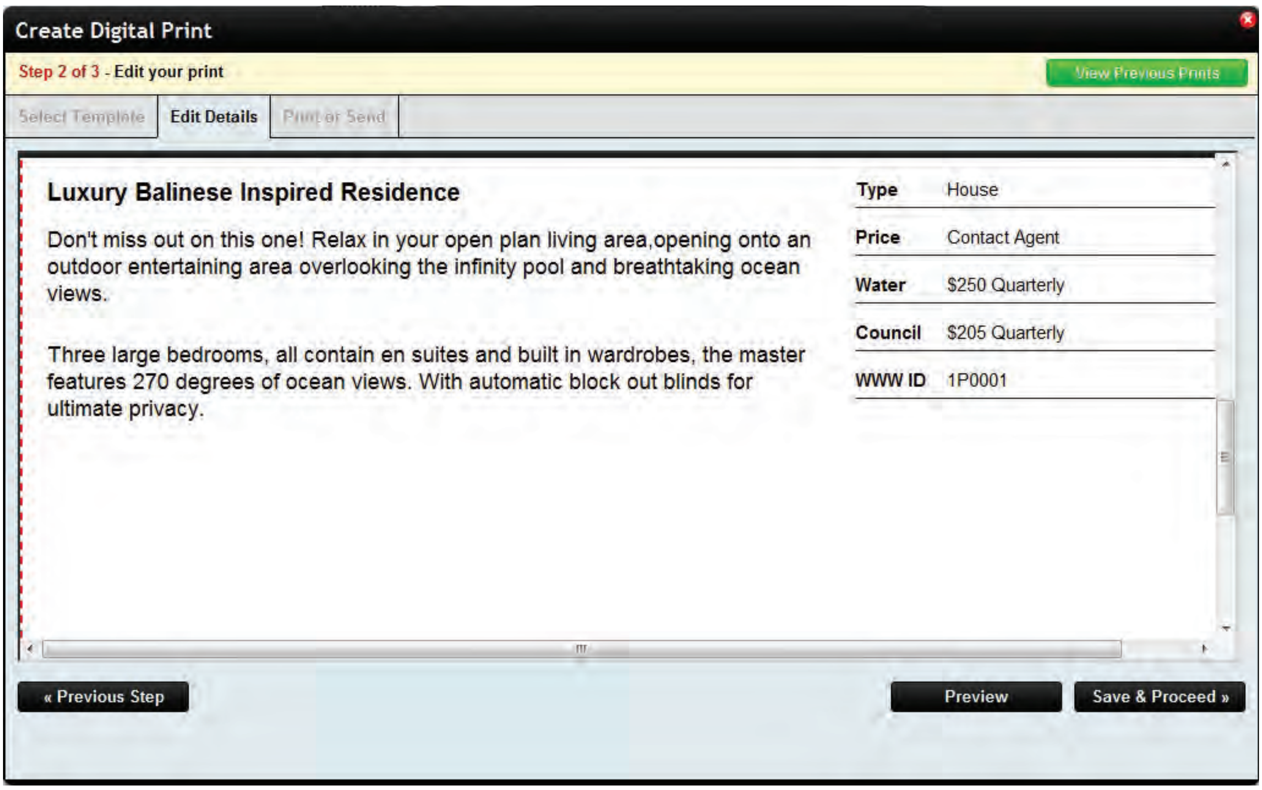
Or

to email the Brochure
11. Enter Recipient and click on their name
12. Click on Add
13. Enter a Subject
14. Enter a Message
14. Click on Send Now
**Note: This will send an email with the Brochure or Window card as an attachment.*



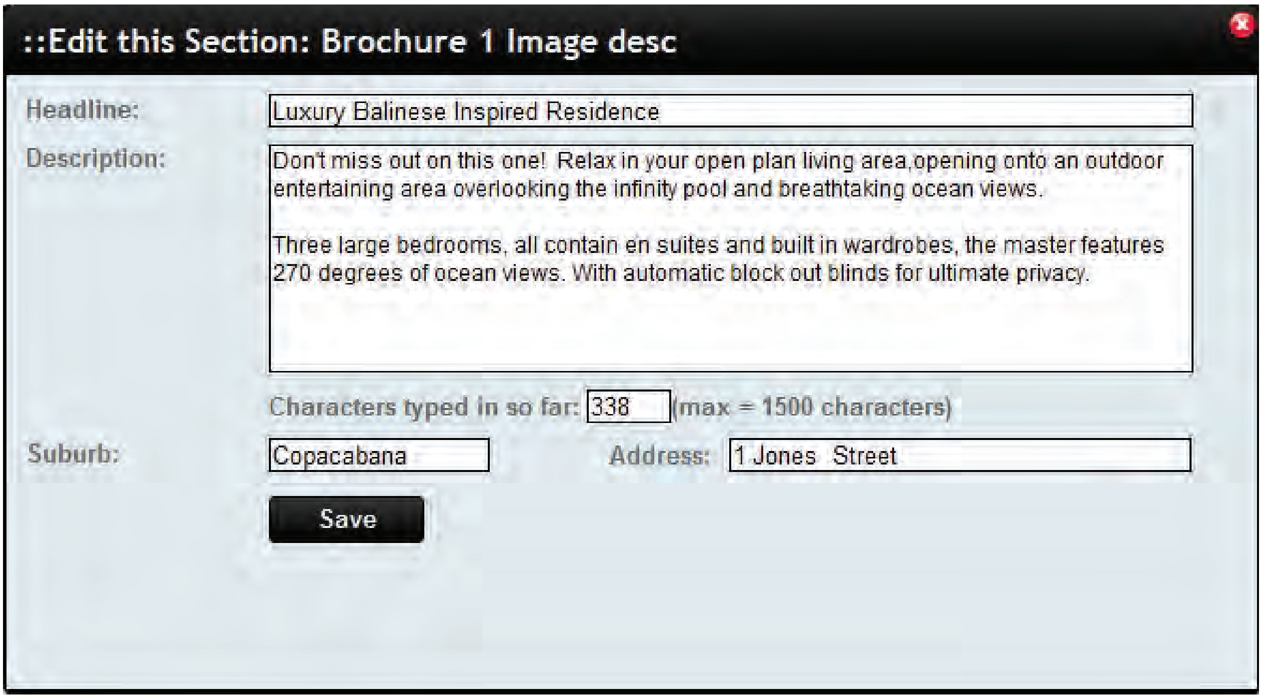
How do I alter the Headline and Description of a Brochure for a Property in Agentbox?

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



2. Edit Heading and Description

3. Click on Save

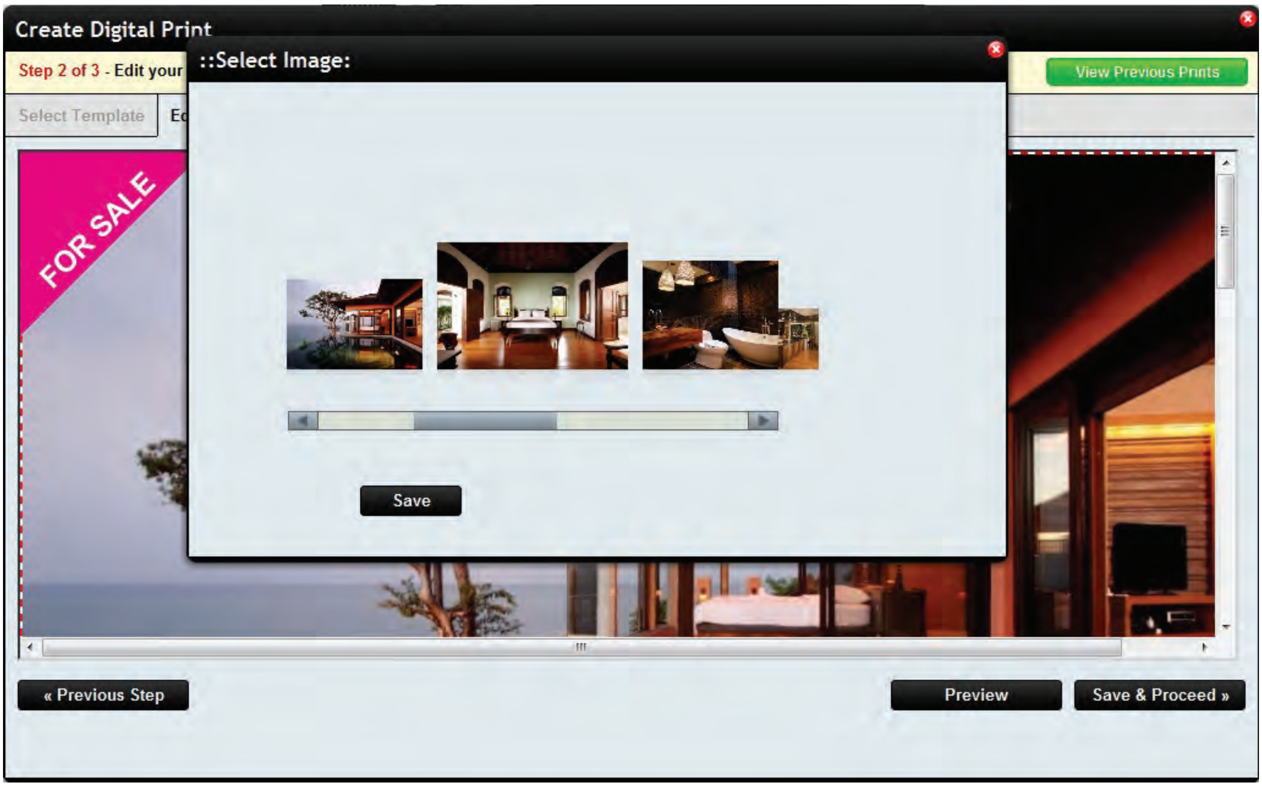


How do I alter the Photo in my Brochure for a Property in Agentbox?

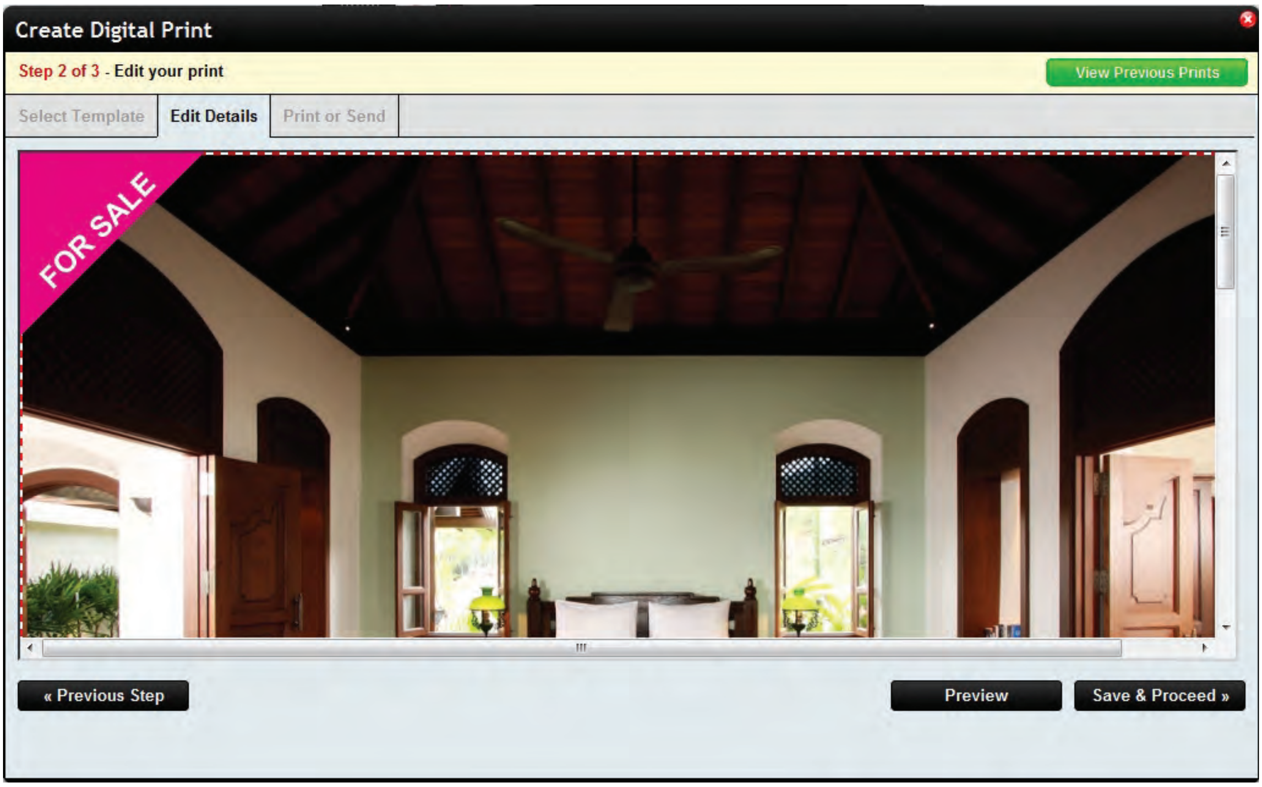
1. Click on the photo in the brochure highlighted by a red dashed border

2. Select the Photo you wish to use

3. Click on Save



4. The new Photo will appear on Brochure



Property Hits

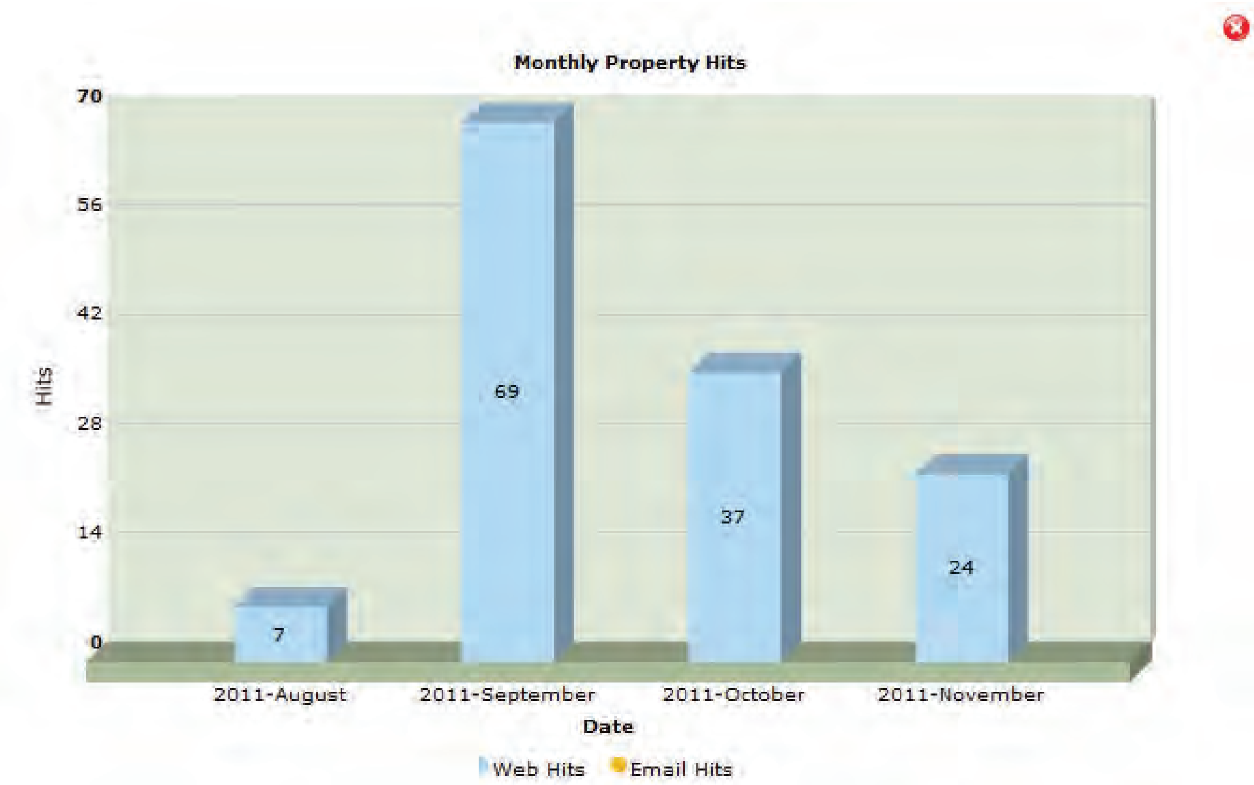
How do I view website hits for a property?

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

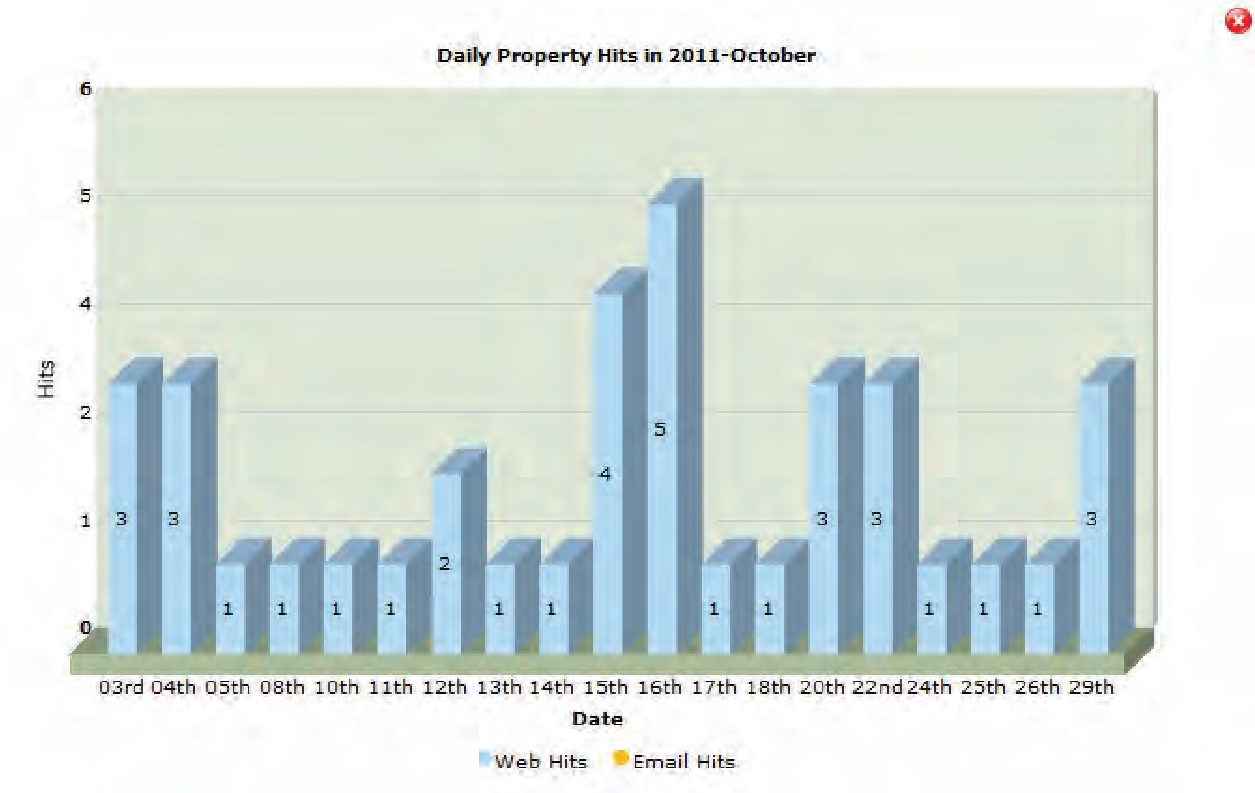
1. Search for your Property and open the Property Card

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.



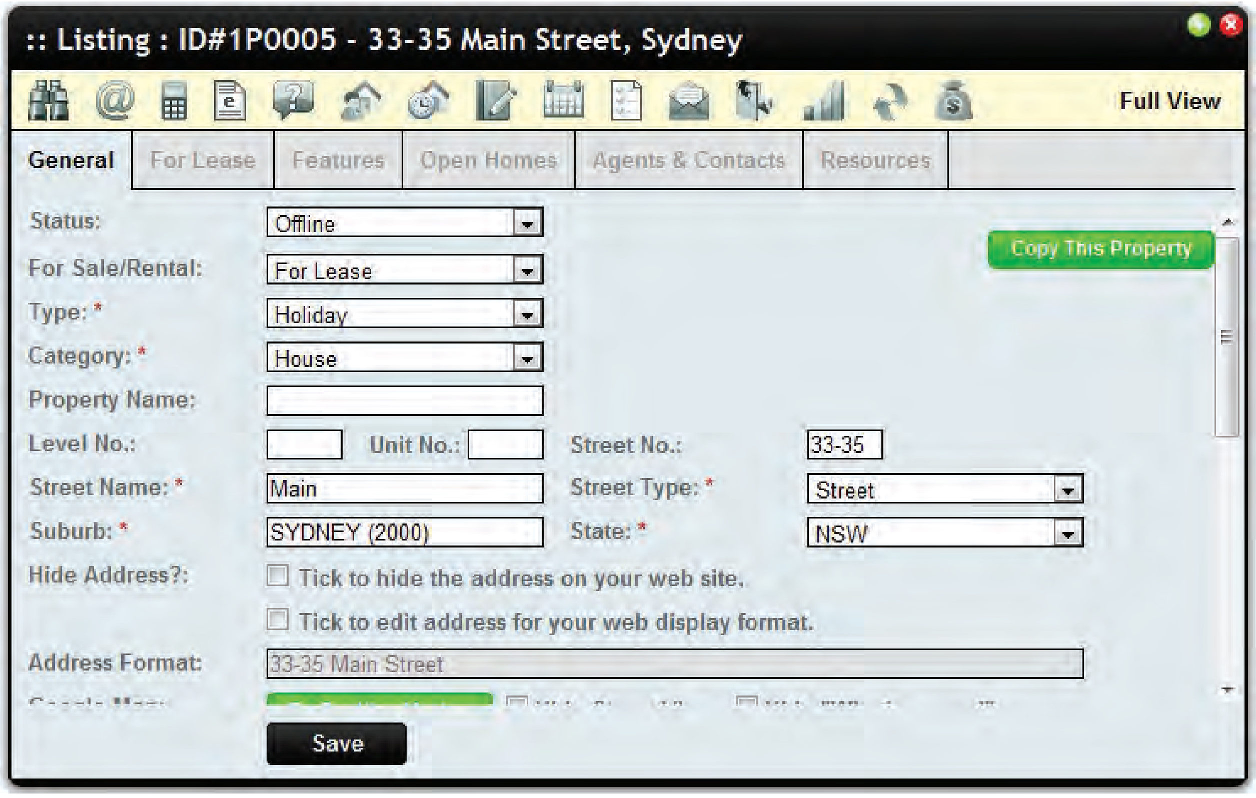
4. Once finished click the red cross to close the panel

Portal Feed Logs

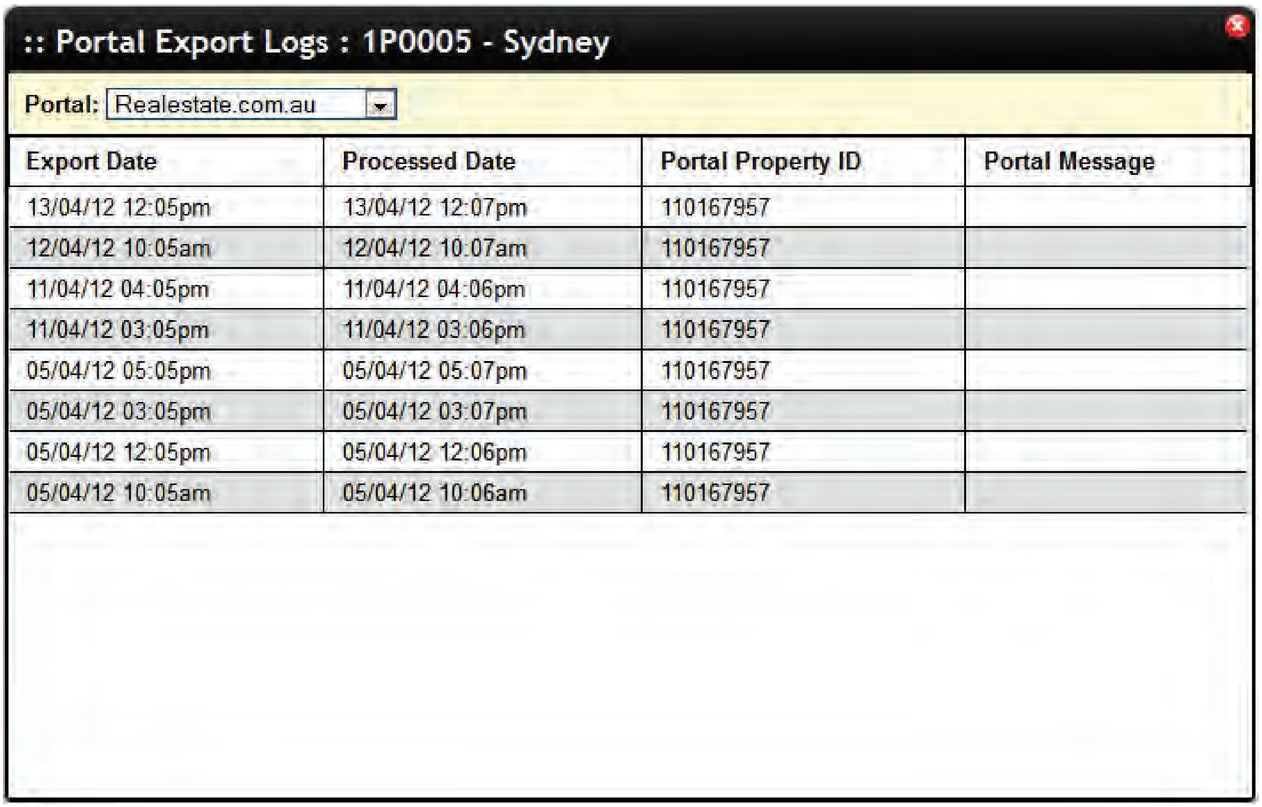
How can I check whether my property has successfully uploaded or updated on a portal?

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.



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	
11/04/12 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	

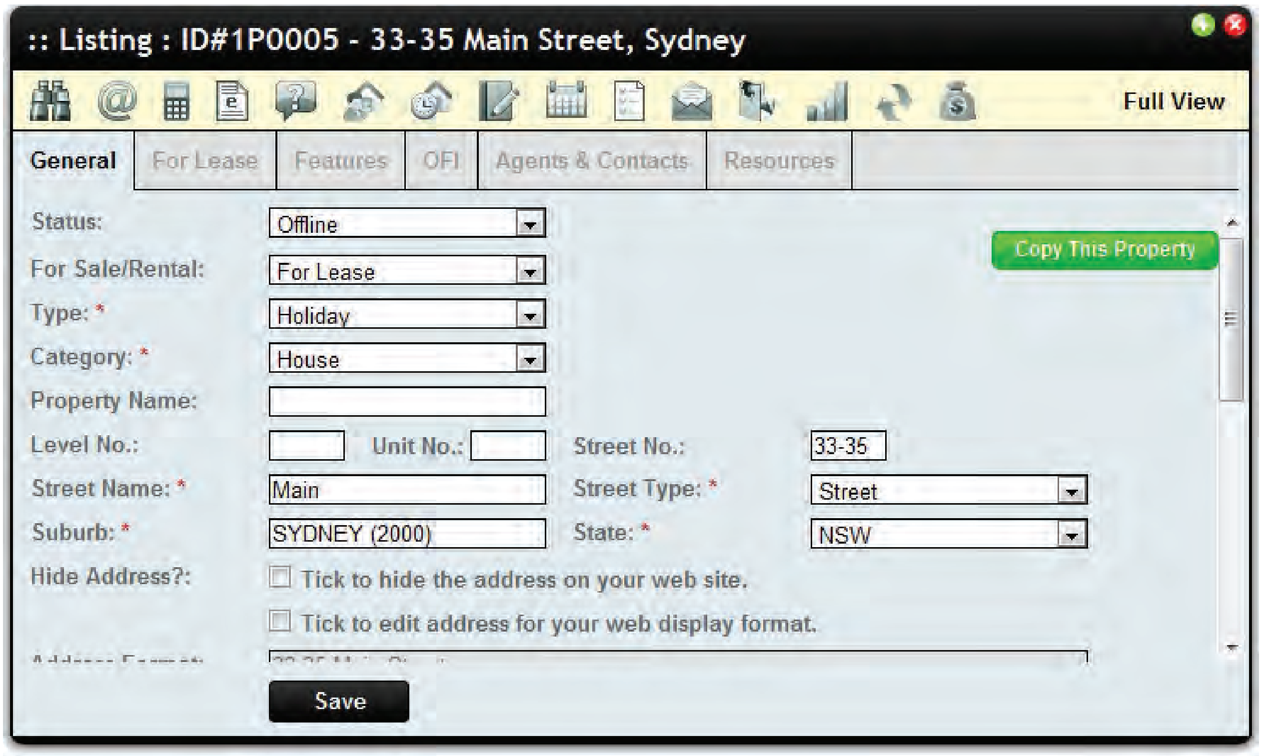
4. If you have checked the portal logs and their is no issue recorded in the portal message please contact support@agentbox.com.au who will investigate this issue for you. Please allow a minimum of 1 hour for the feed to be sent and only call/email support if 4 hours or more have passed.

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 



How do I track Marketing Funds and Expenditure?

The marketing funds system in Agentbox allows you to

1. Log approved funds

2. Log expenses against a property e.g. photography and signboard costs and note who is responsible for the costs e.g. the office, agent, vendor. You can also share the costs across these people.

3. Mark a full or part payment against the approved funds

4. Print a report for the Vendor or Accounts department

**Note - If a payment has been logged against the approved funds, the report will show you a balance of how much you have left to spend. If the payment has not been made, the report will display how much the client owes and can be used to chase a payment.*

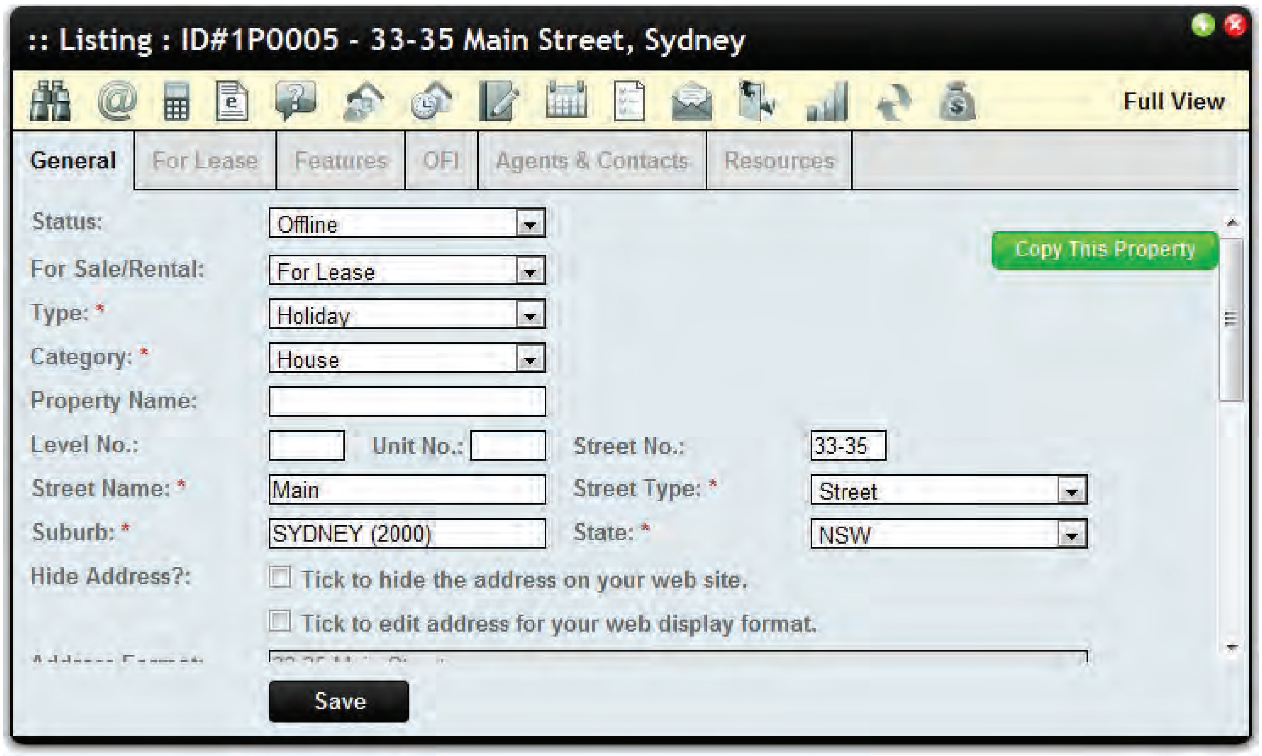
In this example the Vendor has approved $3000.00 to spend on marketing during their Auction Campaign. There has been $1500.00 worth of logged expenses so a report needs to be printed to send alongside an invoice requesting payment. We will then log a full payment against the property and generate the report to view the balance of received funds.

Log Marketing Funds

How do I log approved marketing funds?

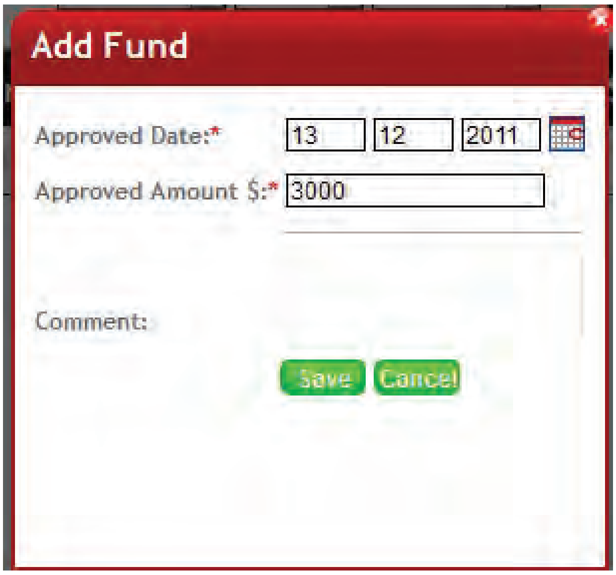
1. [Search for your Property]() and open the [Property Card]()

2. Click on the Marketing Funds action icon 

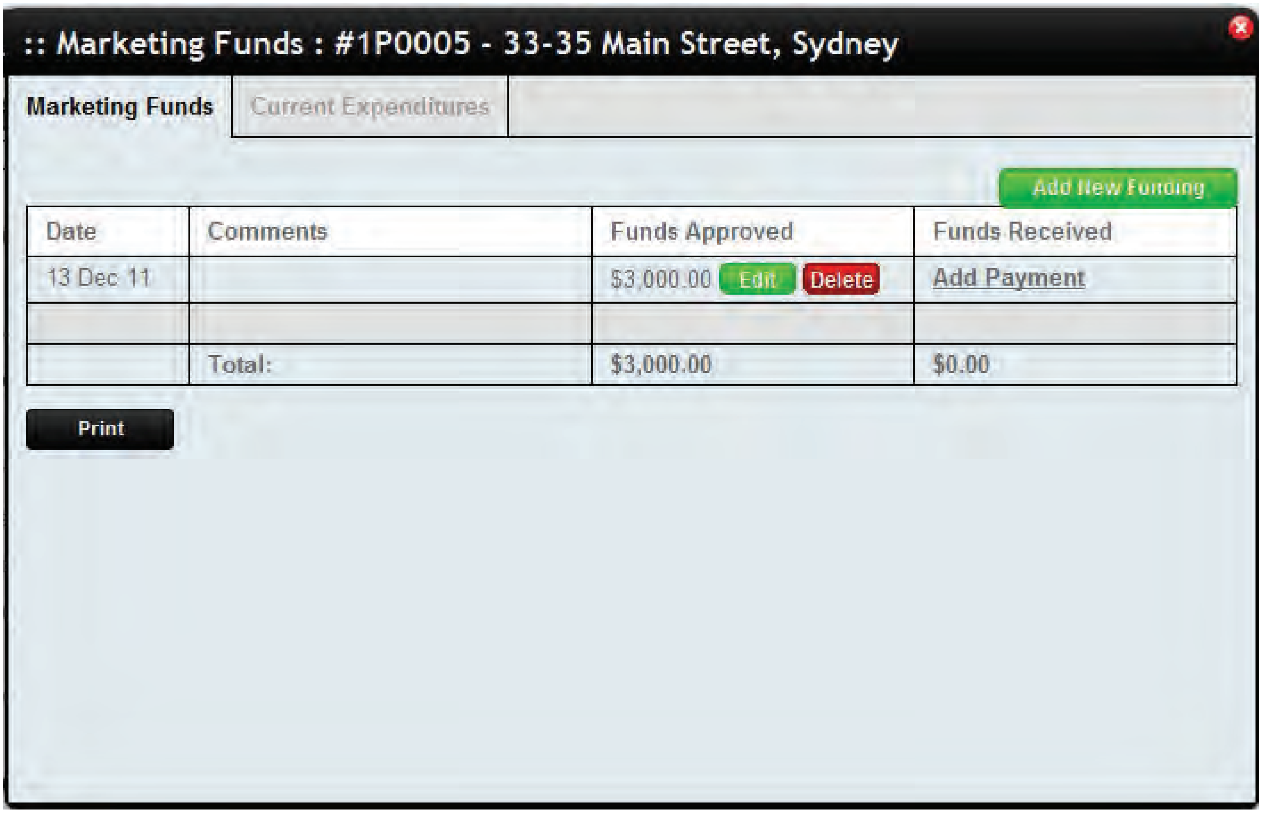


3. In the first tab - Marketing Funds click the Add new funding button.

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



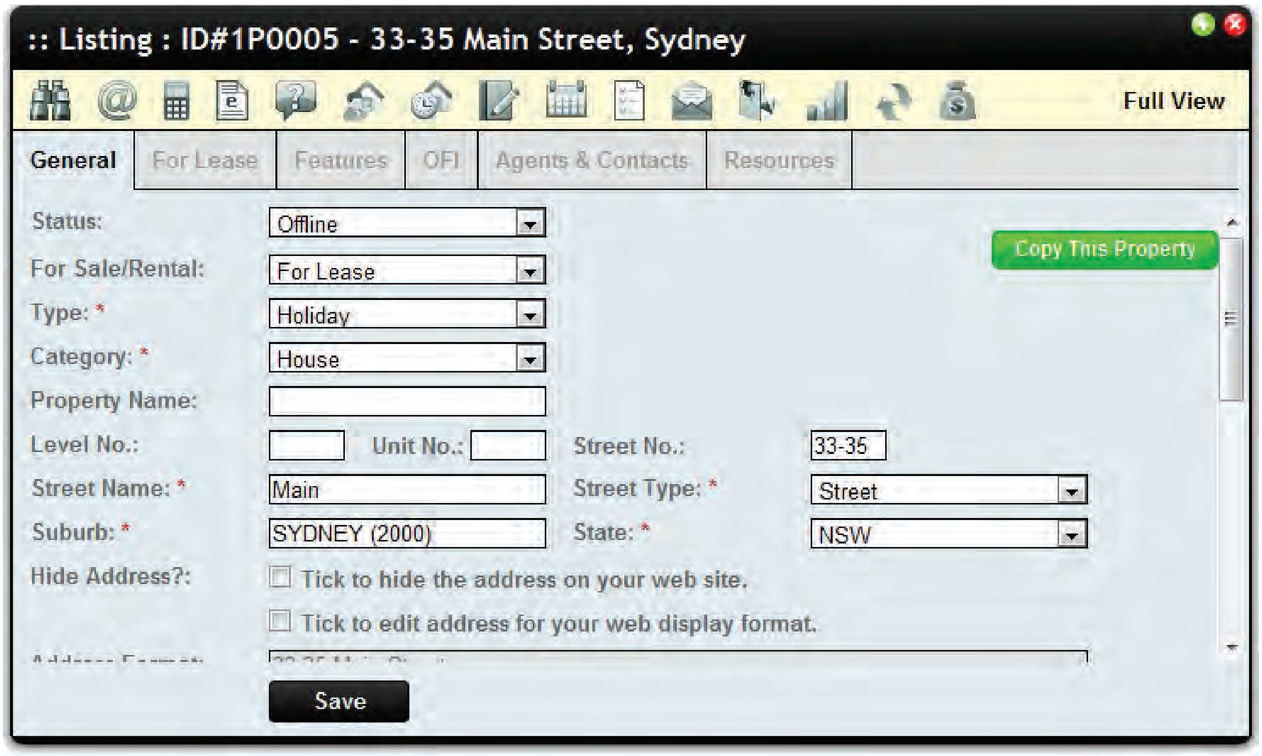
4. You can now Edit or Delete this fund in the Funds approved column of the Marketing Funds tab. Or add a payment if the funds have been approved.



Record Expenses

How do I record expenses against a property?

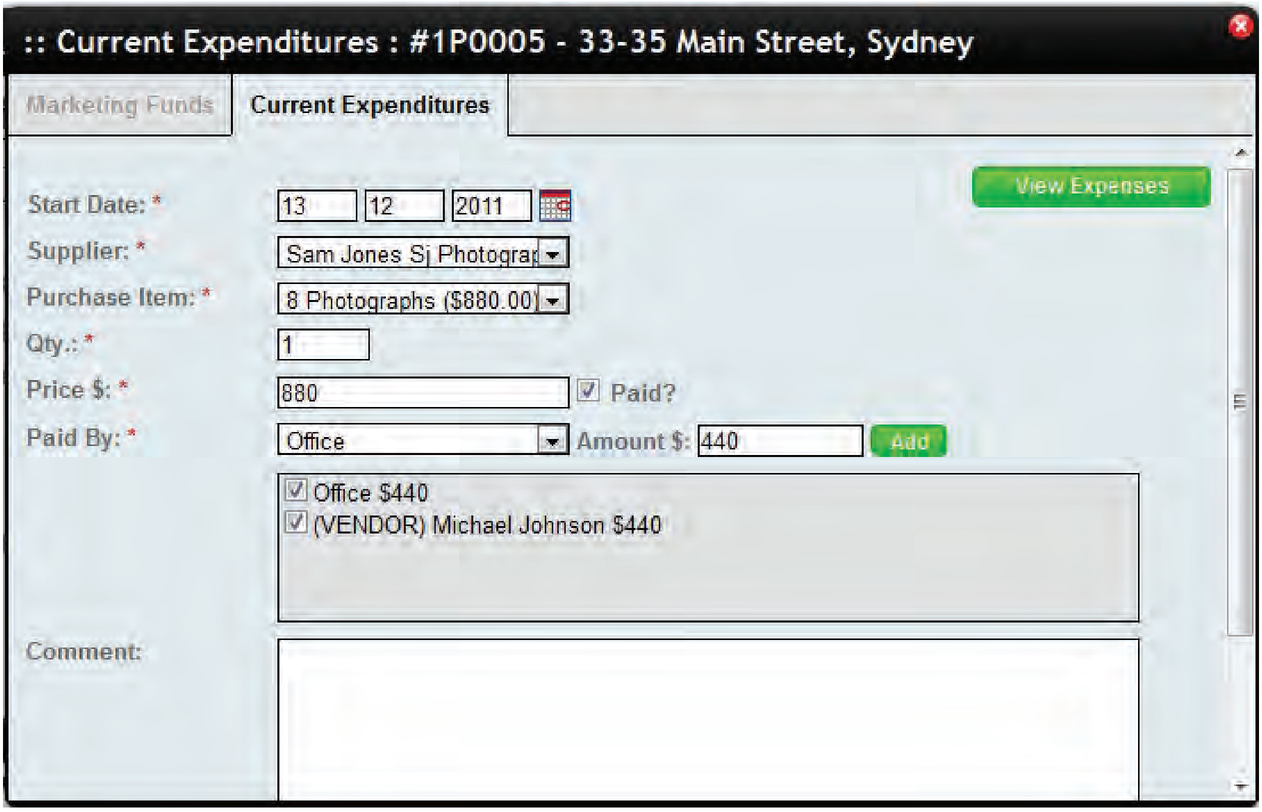
1. Search for your Property and open the Property Card
2. Click on the Marketing Funds action icon 



3. Click on the Current Expenditures Tab

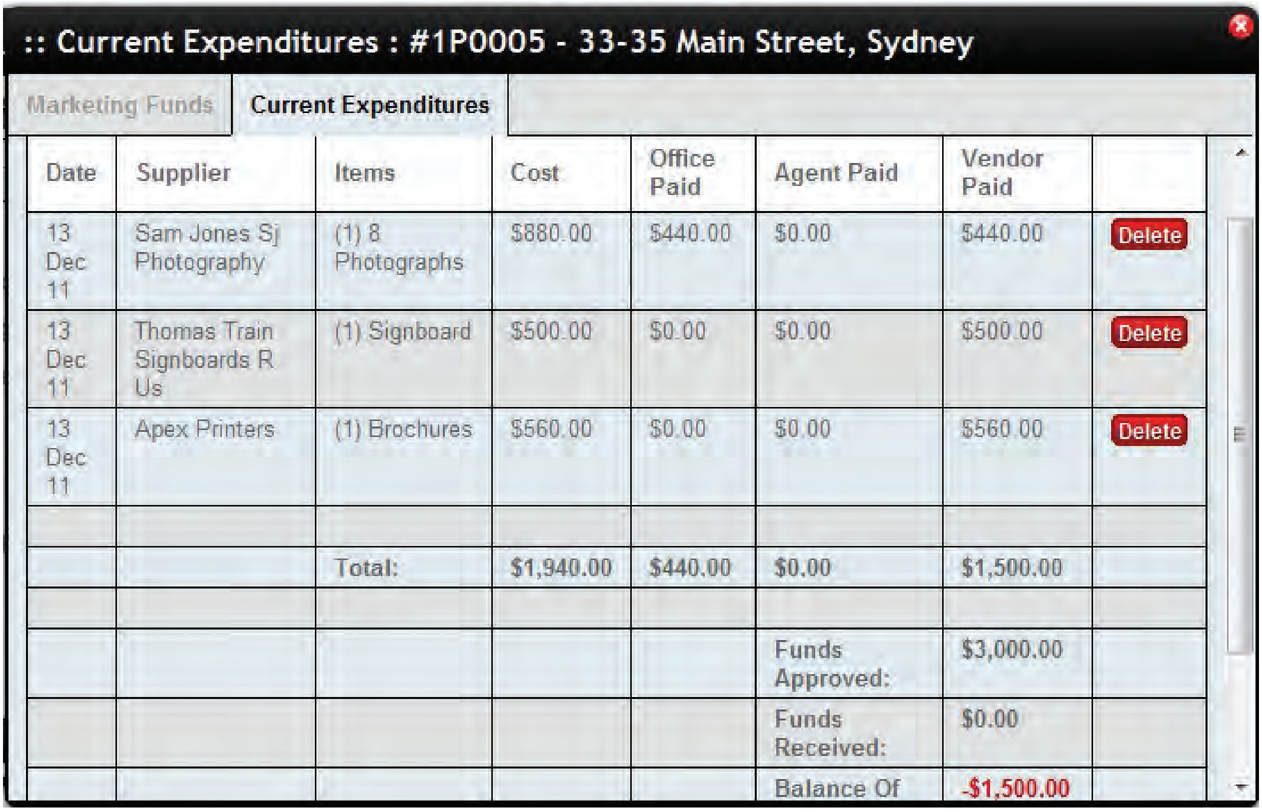
4. Click Add New Expense

- o Enter the date of expense
- o Select the supplier (refer to how to add a supplier)
- o Select the item or create a new one
- o Select a Quantity and the Price will automatically calculate
- o By ticking the paid box you can record who is responsible for this expense, in this case half will be paid by the office and half by the vendor.
- o Enter the comments and click Save



5. Repeat step 4 until all expenses have been logged.

In this example the total expenditure to be paid by the Vendor totals $1500.00, because they have not made a payment against the marketing fund, this shows in red how much they owe. If they had made a payment, it would show how much they have left to spend from their approved funds.



6. You can click Print to generate a report for the client.

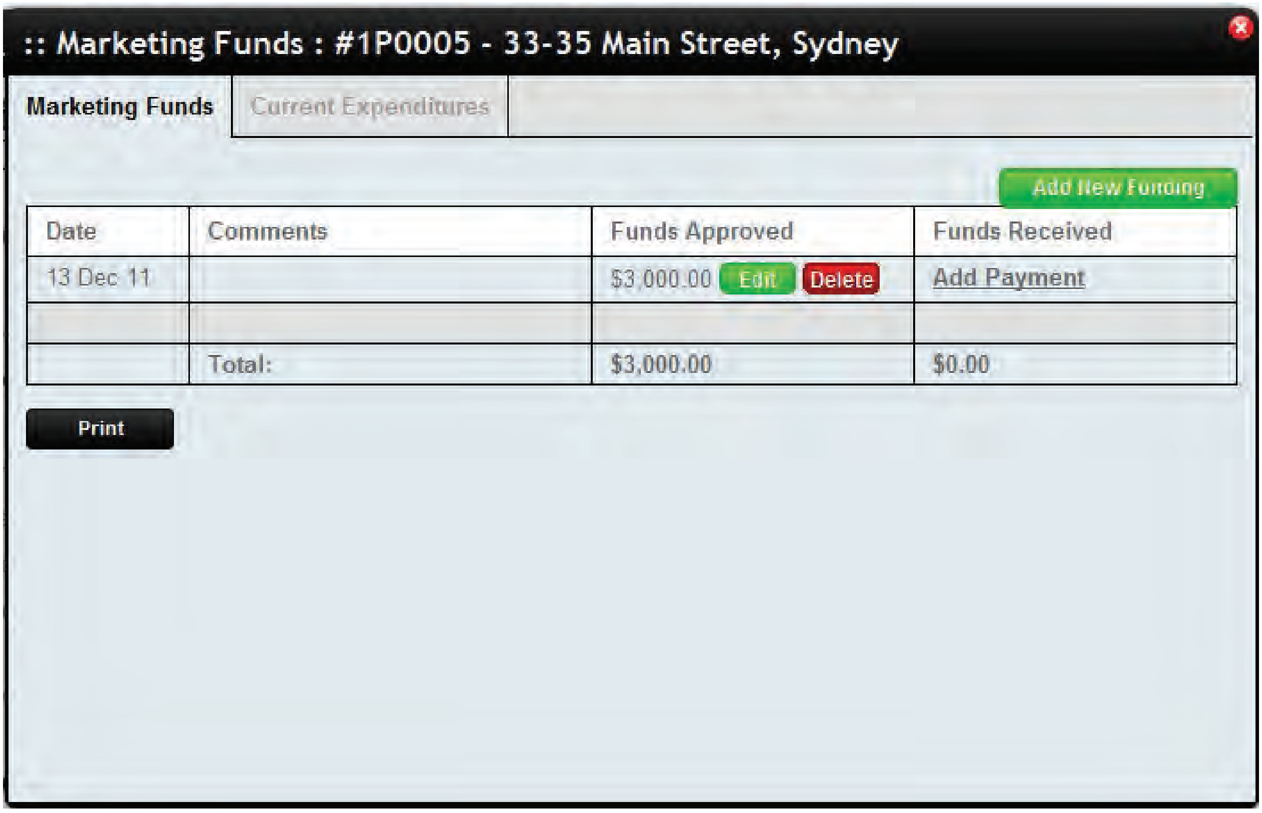
Log Payment

How do I record a full or part payment against an approved marketing fund?

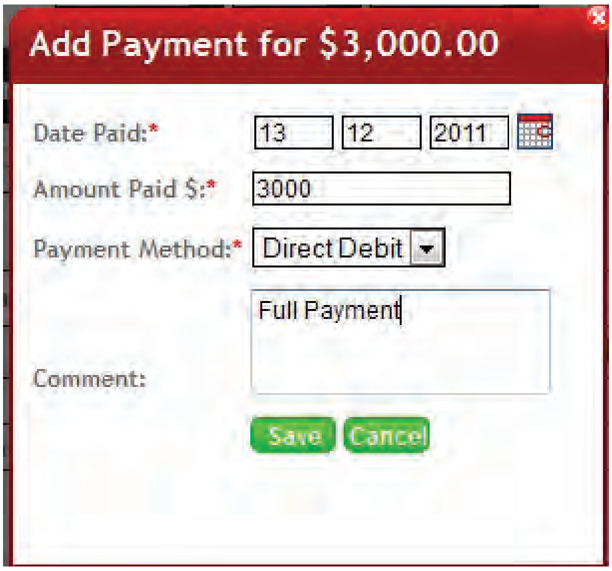
1. Search for your Property and open the Property Card

2. Click on the Marketing Funds action icon 

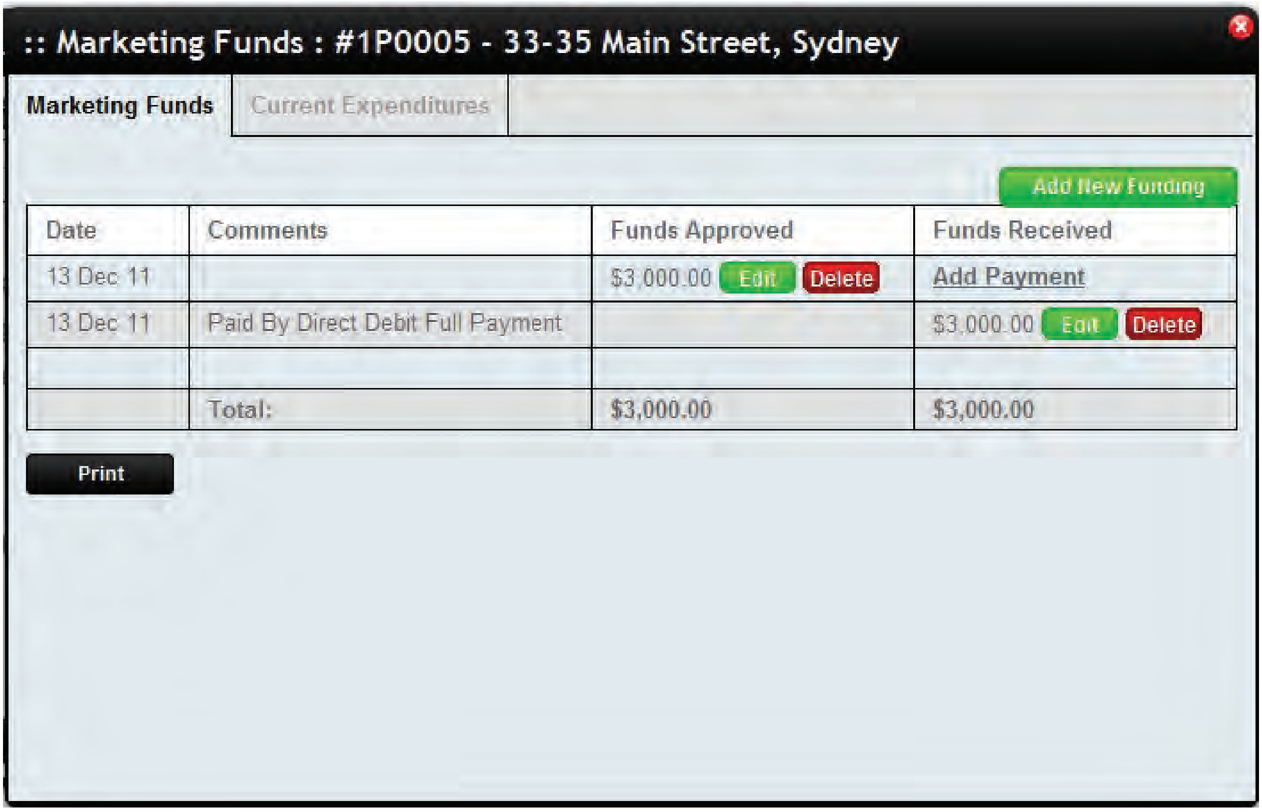
3. In the first tab - Marketing Funds click Add Payment in the funds received column next to the approved funding.



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



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

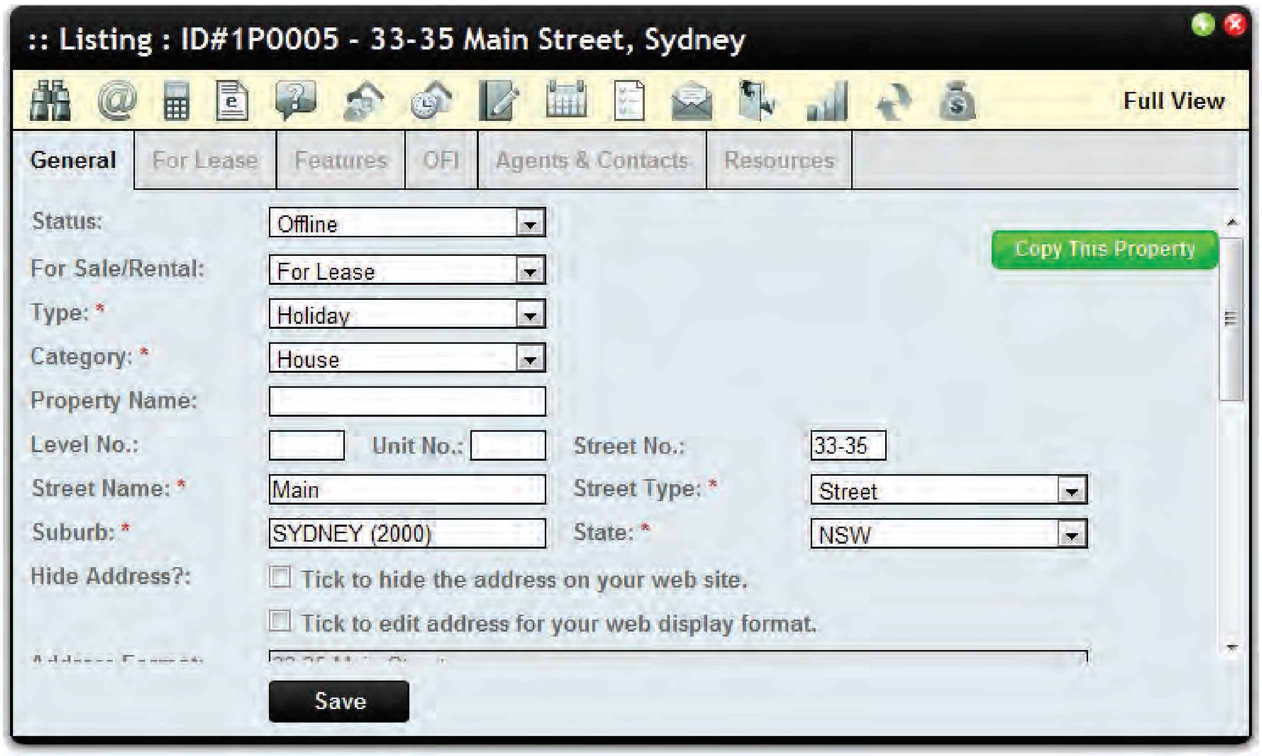


Print Report

How do I Print a Marketing funds report?

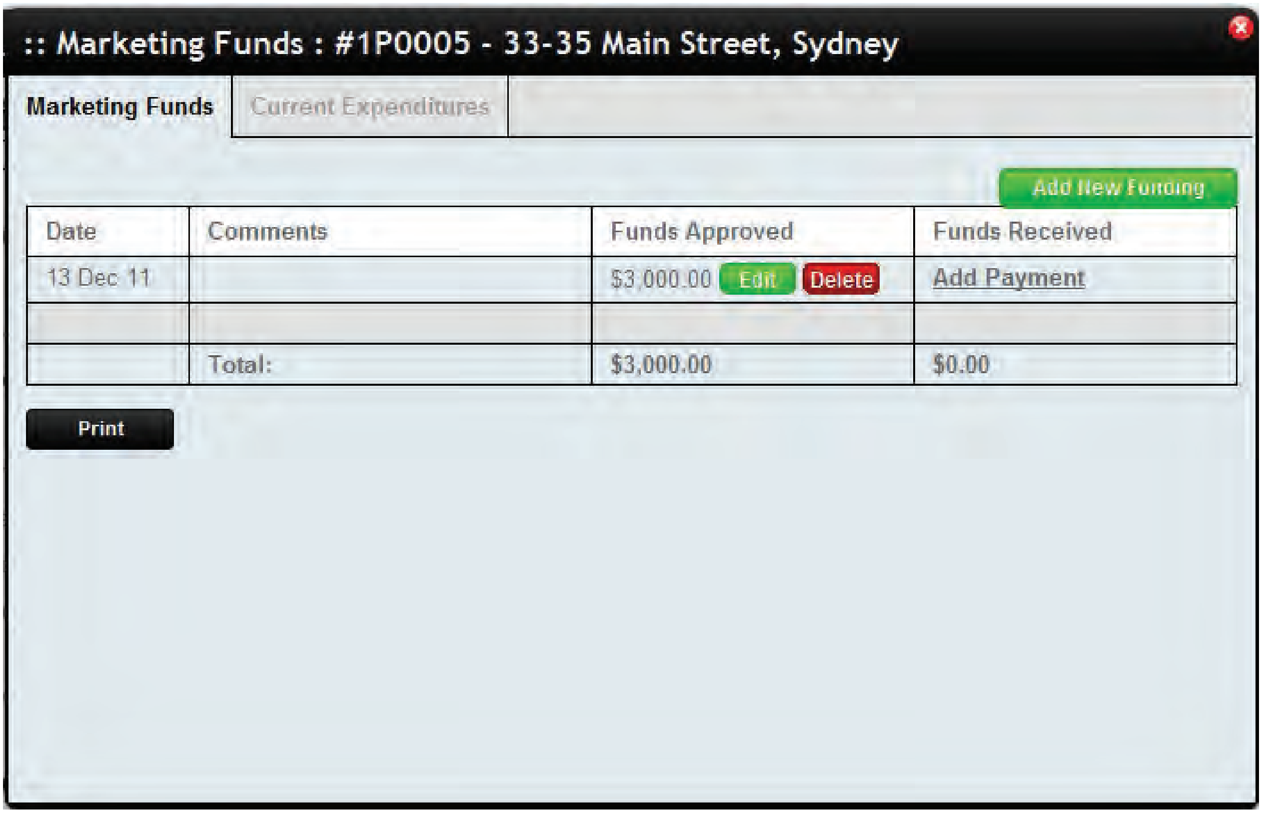
1. Search for your Property and open the Property Card

2. Click on the Marketing Funds action icon 



3. Click Print

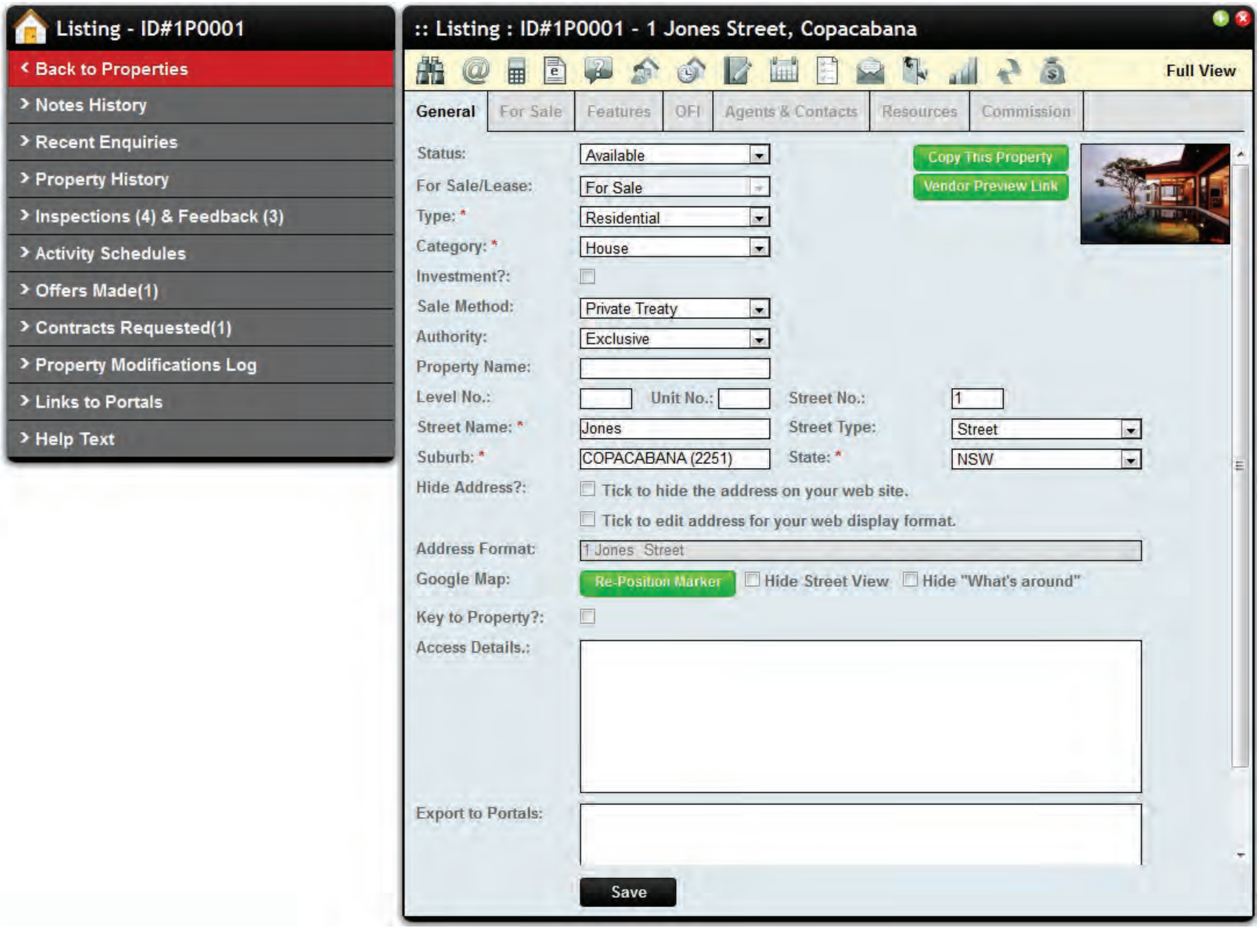
**Note: If a payment has been logged against the approved funds, the report will show you a balance of how much you have left to spend. If the payment has not been made, the report will display how much the client owes and can be used to chase a payment.*



Notes History

How do I view all notes logged against a property?

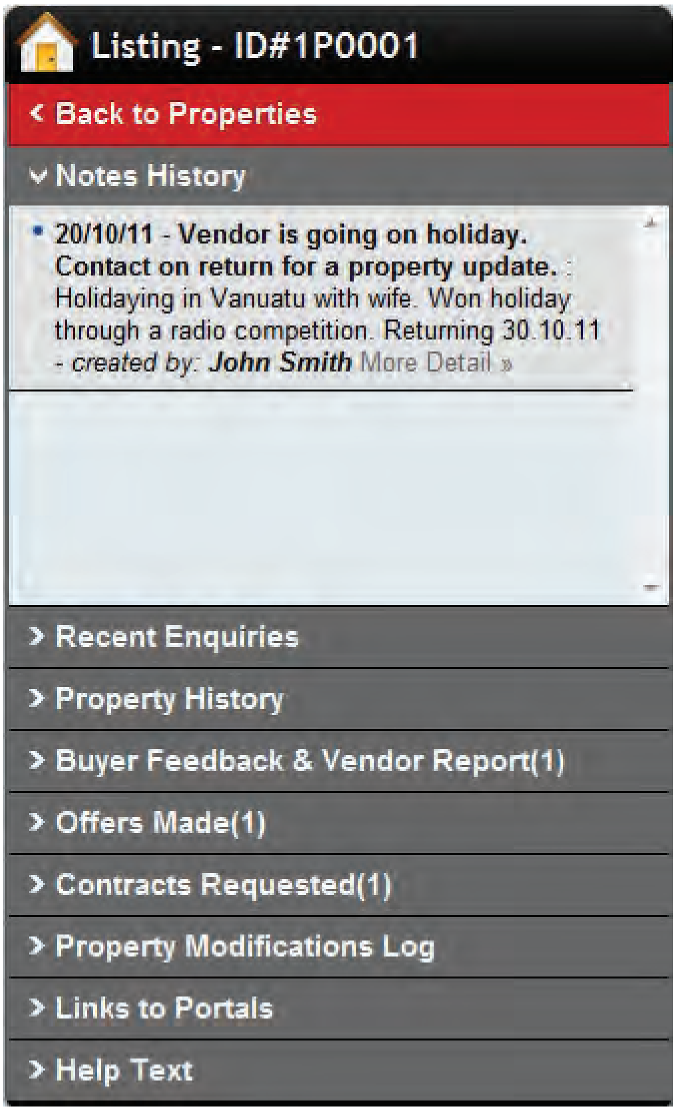
1. Search for your Property and open the Property Card



2. Click on Notes History on the Left Property Panel (If the matching left panel is not visible, click Full View in the top right hand corner of the property card).

3. Here you can view a list of all Notes for the property that were logged using the Add a Note action icon.

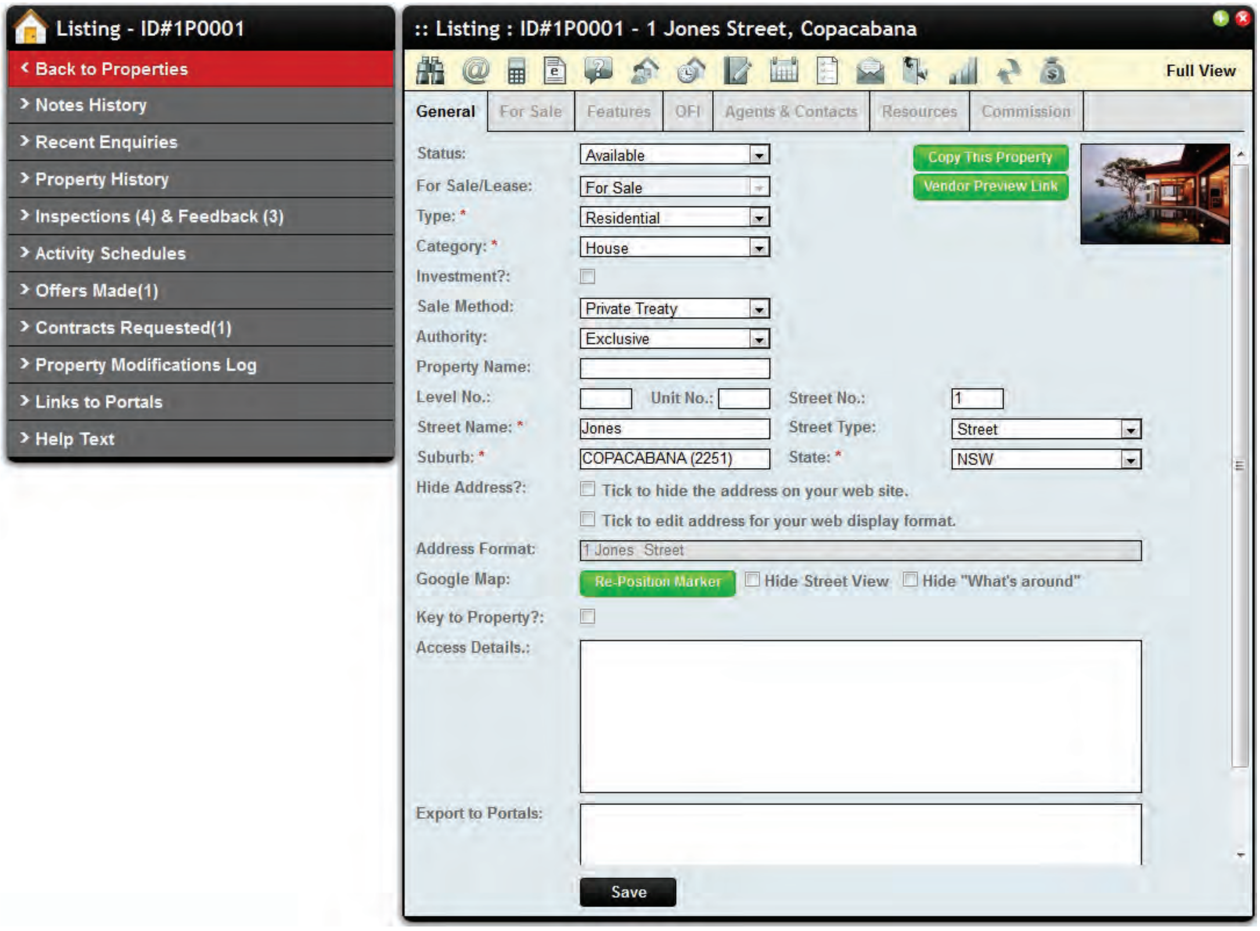
4. Click More Detail next to open the corresponding note.



Property History

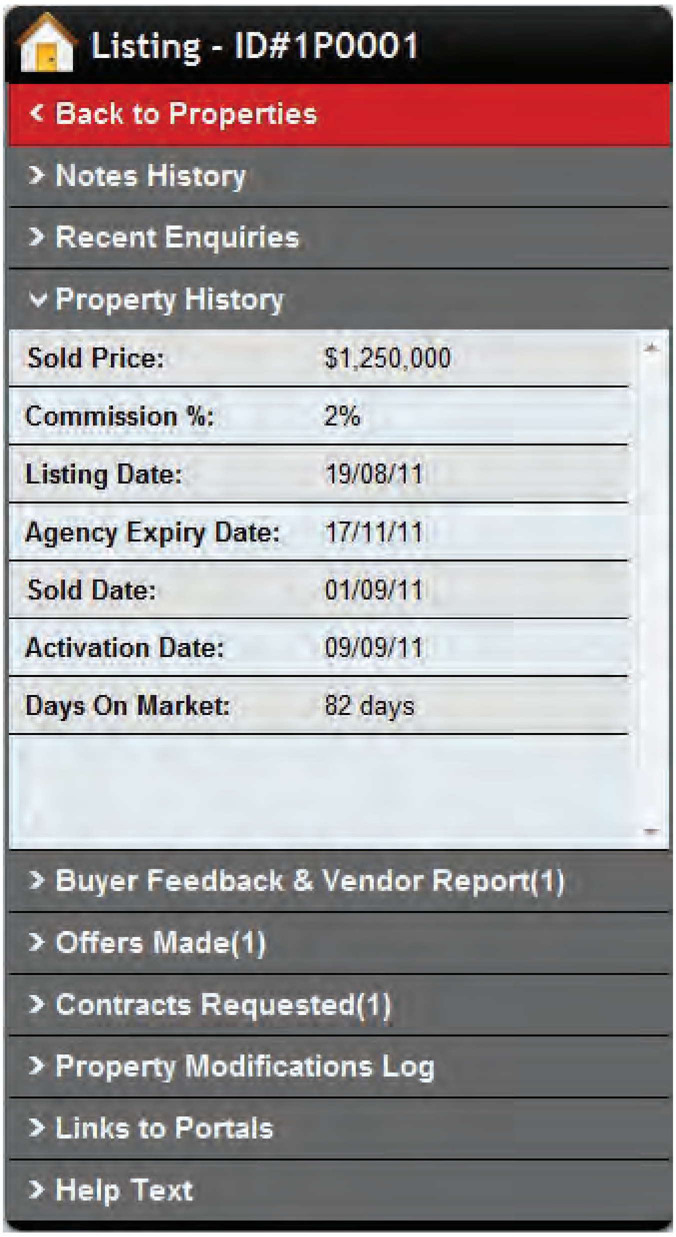
How do I view the history of my property?

1. Search for your Property and open the Property Card



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.

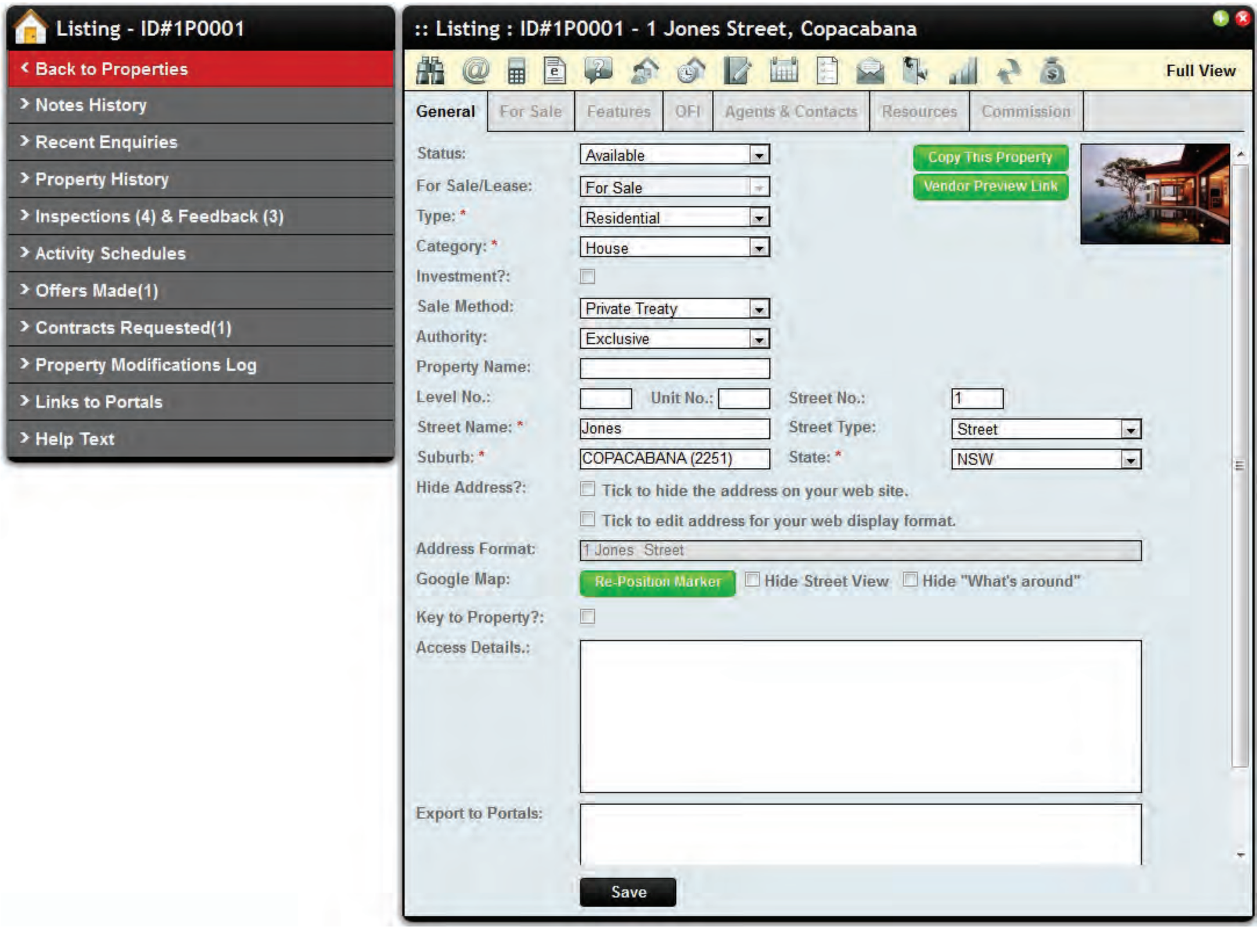


Inspection Feedback

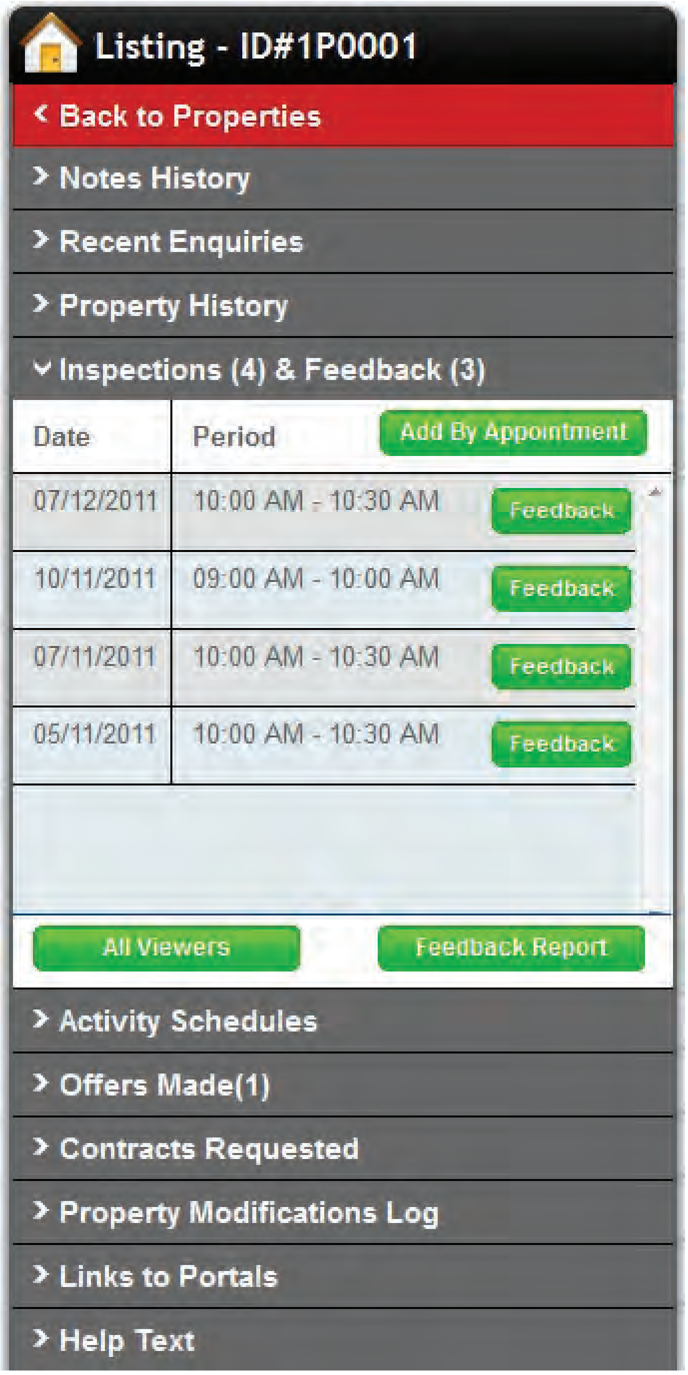
How do I Add Feedback after a Property Inspection into Agentbox?

1. Search for your Property and open the Property Card

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

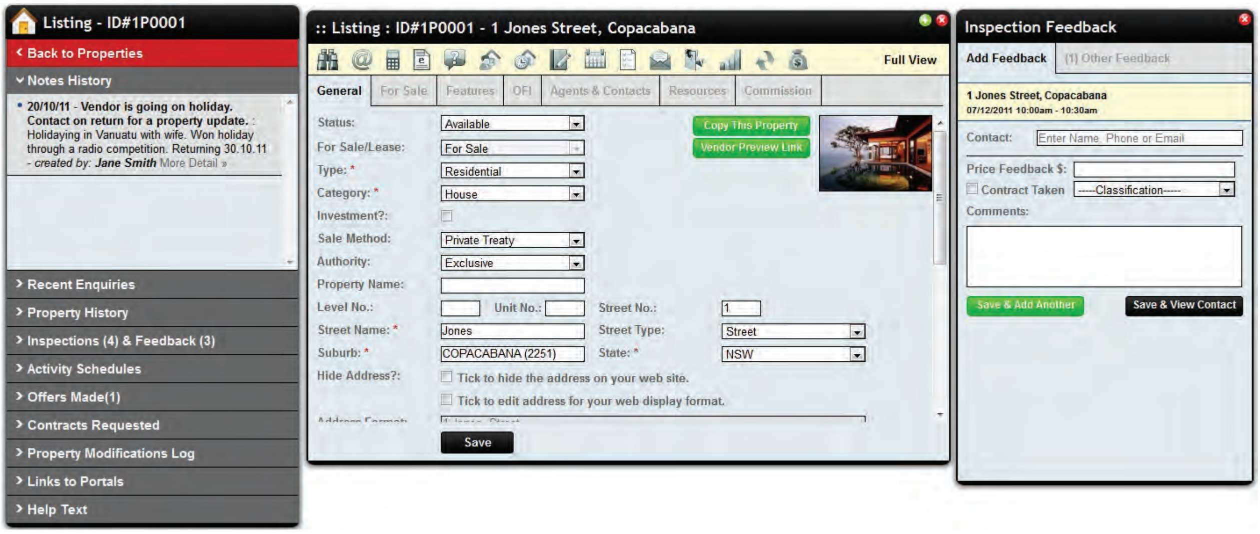


2. Click on 'Inspection & Feedback' on the left property card panel

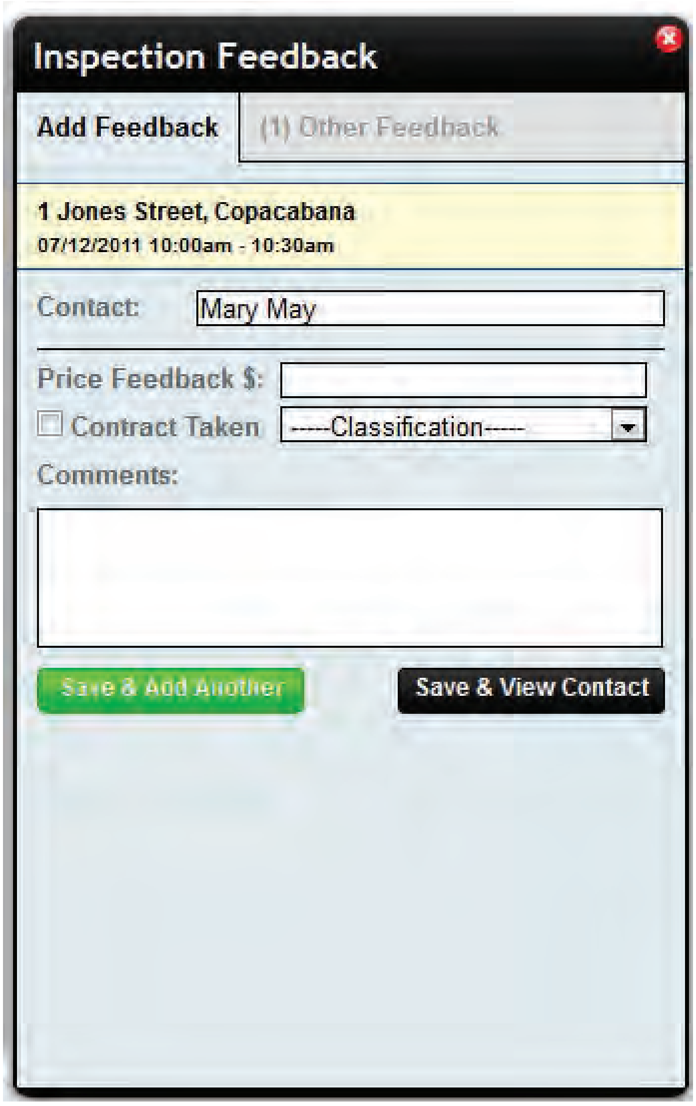


3. Click on the green ‘Feedback’ button next to the property inspection time.

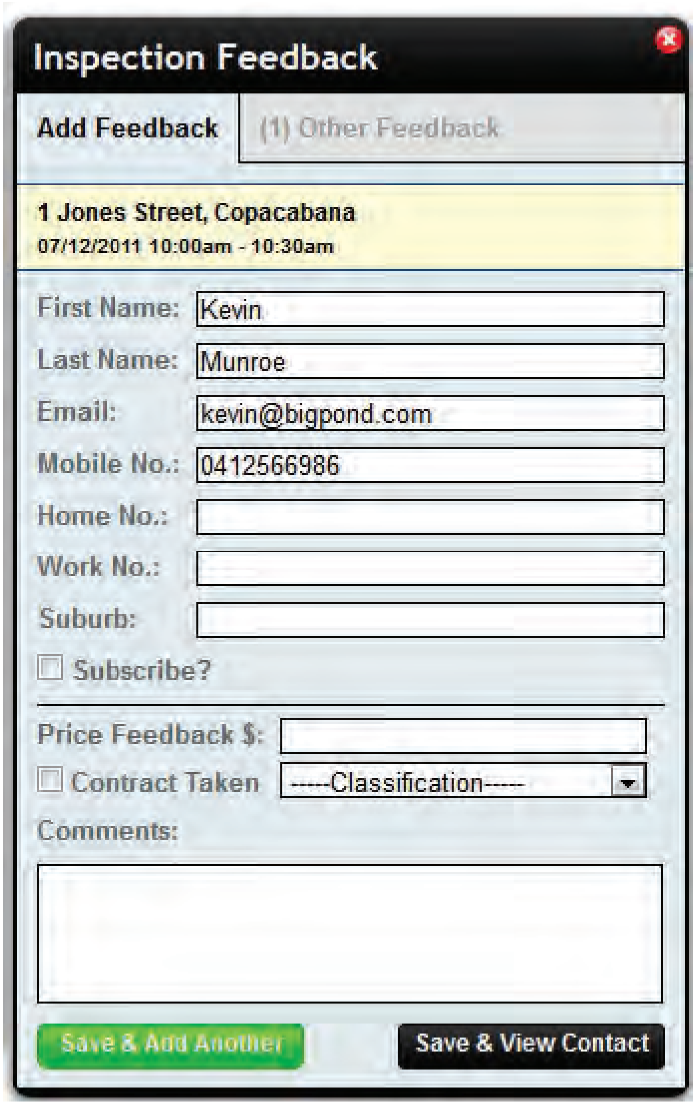
4. The ‘Buyer Feedback’ window will open in the right panel.



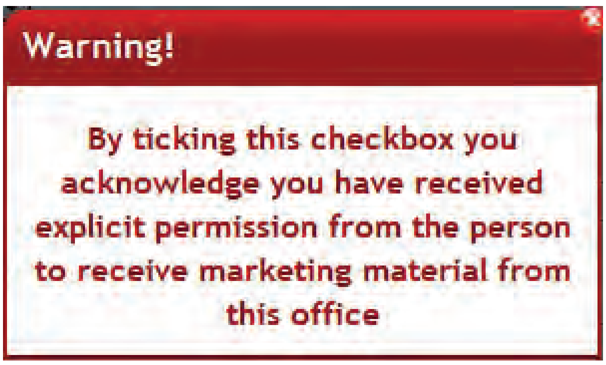
5. Search for the contact and select their name from the drop down.



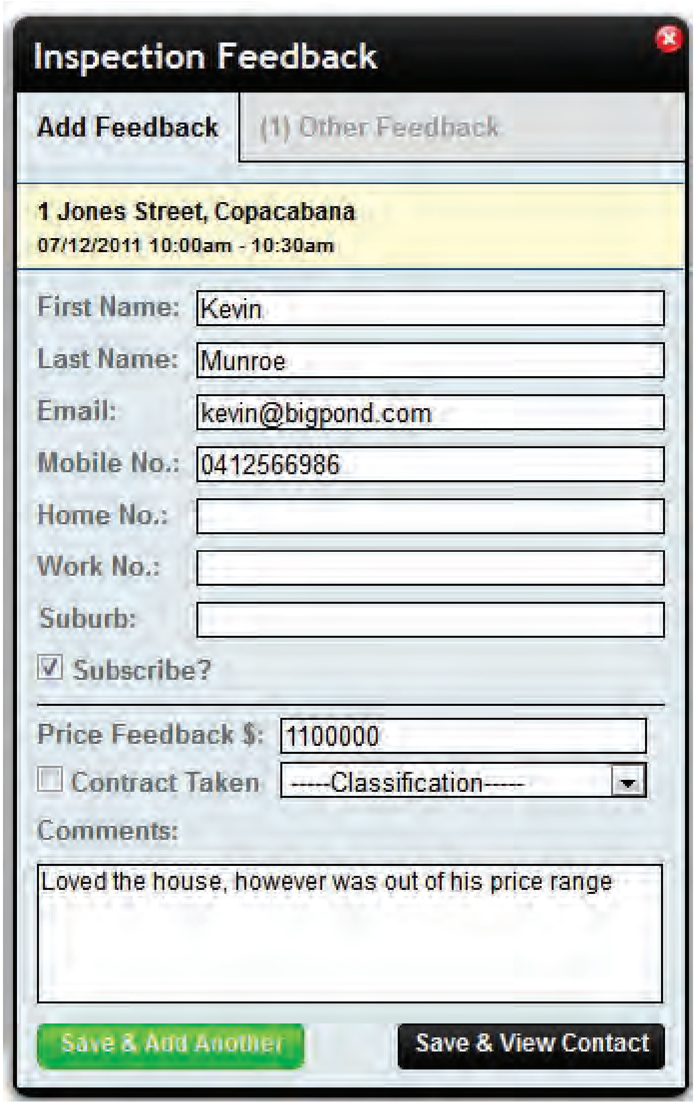
6. To add a new contact, type their name in the contact search and select 'Add new contact' from the results. You can quickly enter their basic contact details and subscribe them to receive both standard e-newsletters and property alerts.



**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.



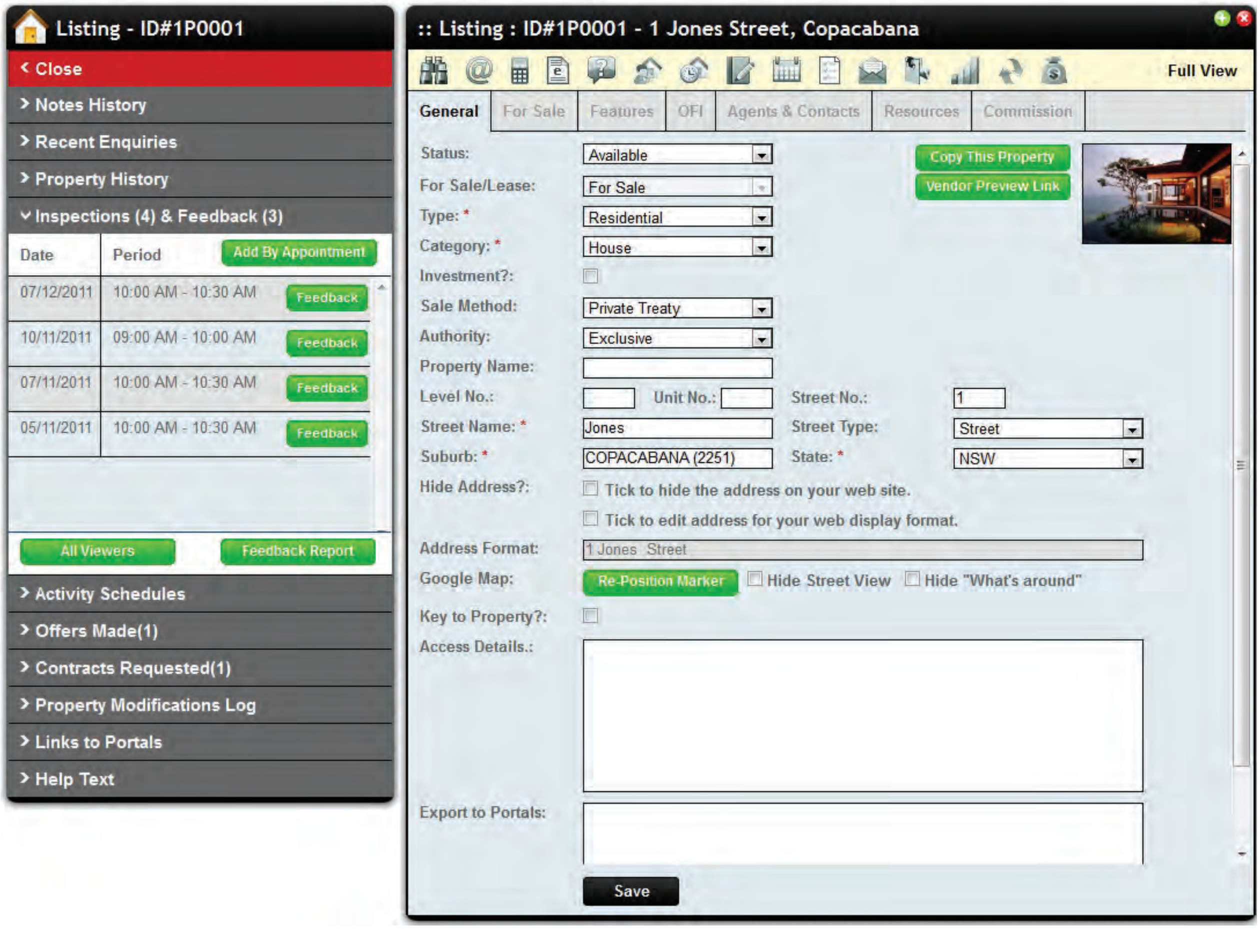
8. Click on Save & Add another or Save & View Contact to complete the Contact Card or edit the contact requirements if applicable
**Note: The Contact will be added as a buyer if inspecting a for sale property otherwise as a tenant with requirements matching the property they inspected.*

Contact Inspection Viewers

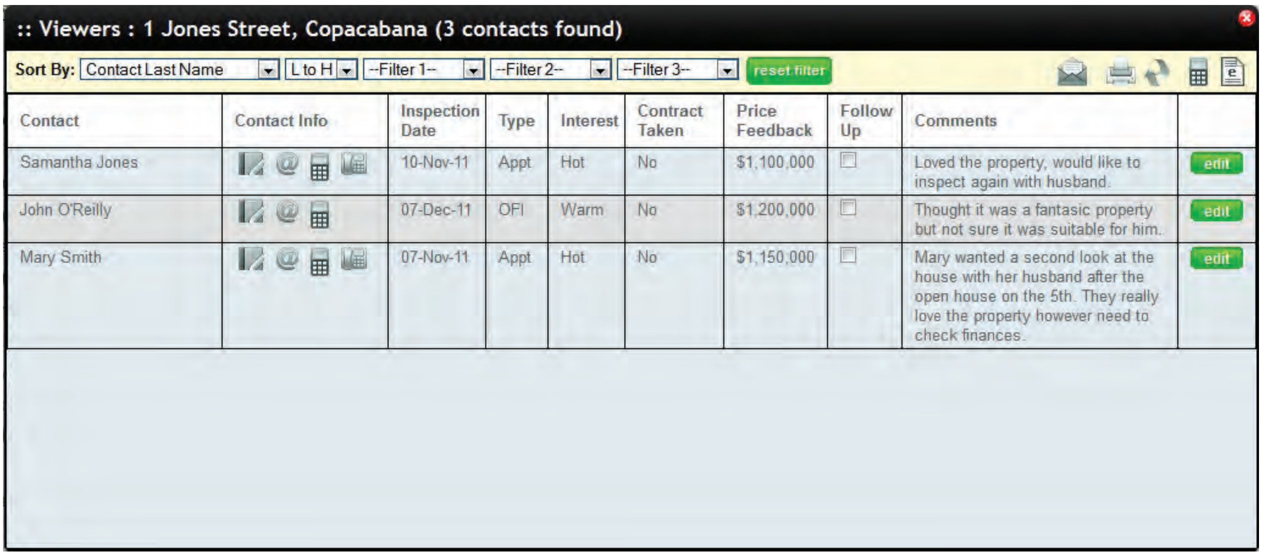
How do I view all feedback for a property? (This includes all feedback from both open homes and appointment inspections).

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).



3. Click the green Viewers button.

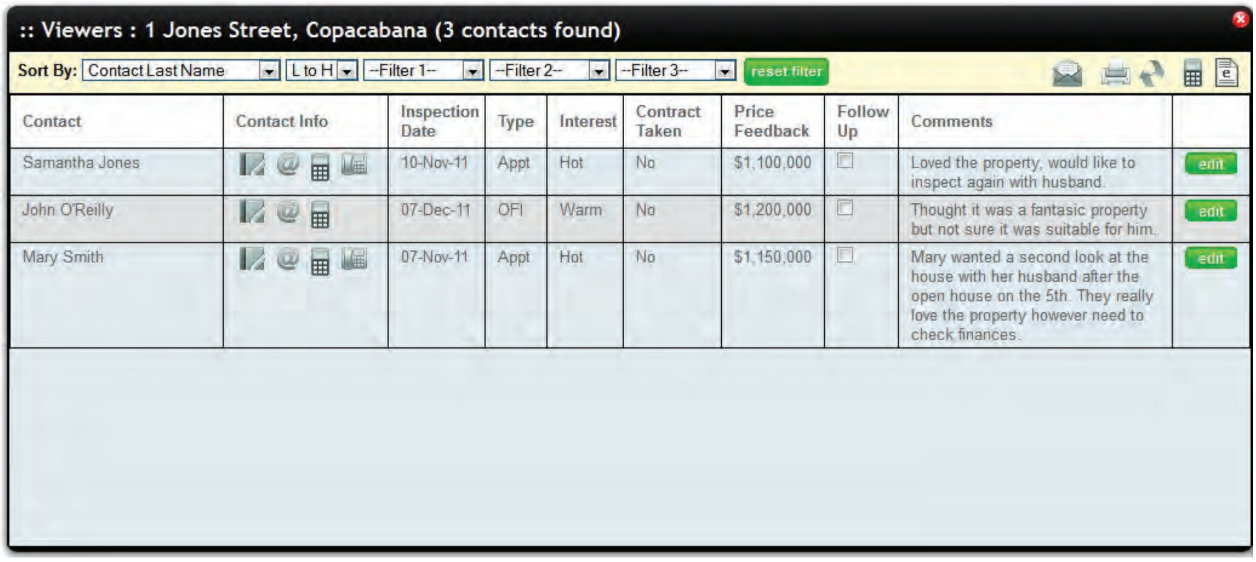


4. You can edit feedback by clicking [Edit] next to the comments, you can sort and filter viewers of the property by name, date, inspection type, price feedback, interest levels and follow up flag.

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

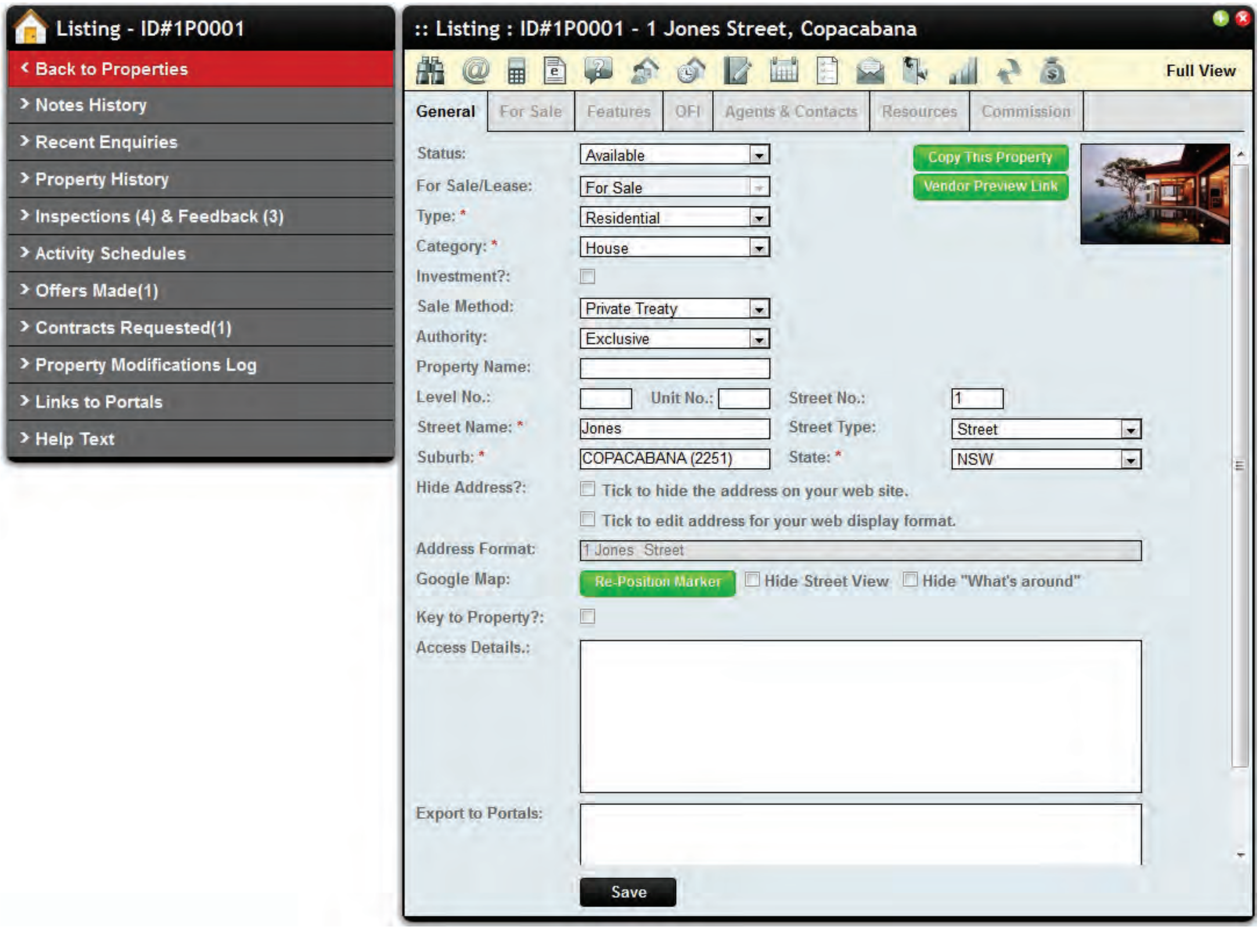


2. Using the action icons  you can print the list of viewers with their comments or their contact details, download a CSV file with viewer details, SMS all viewers, send all viewers an E-Newsletter and also print a contact report.

Vendor Report

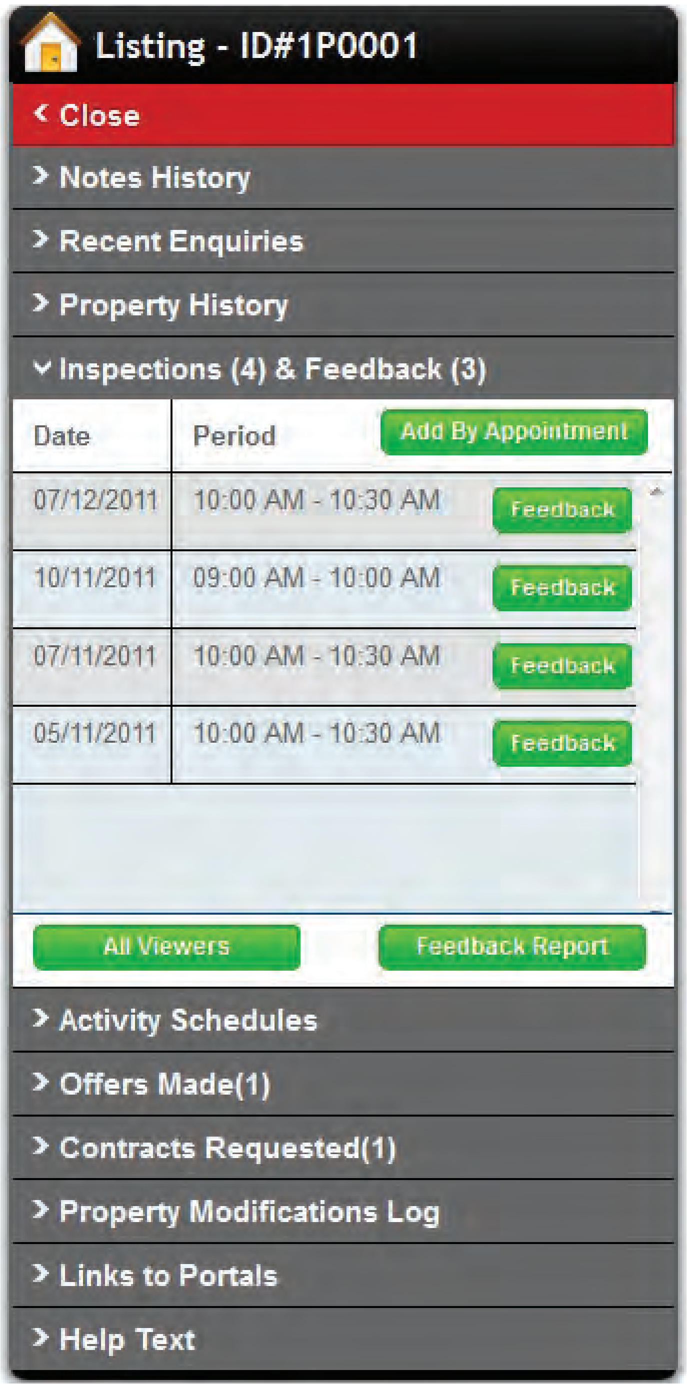
How do I Create a Vendor Report in Agentbox?

1. Search for your Property and open the Property Card



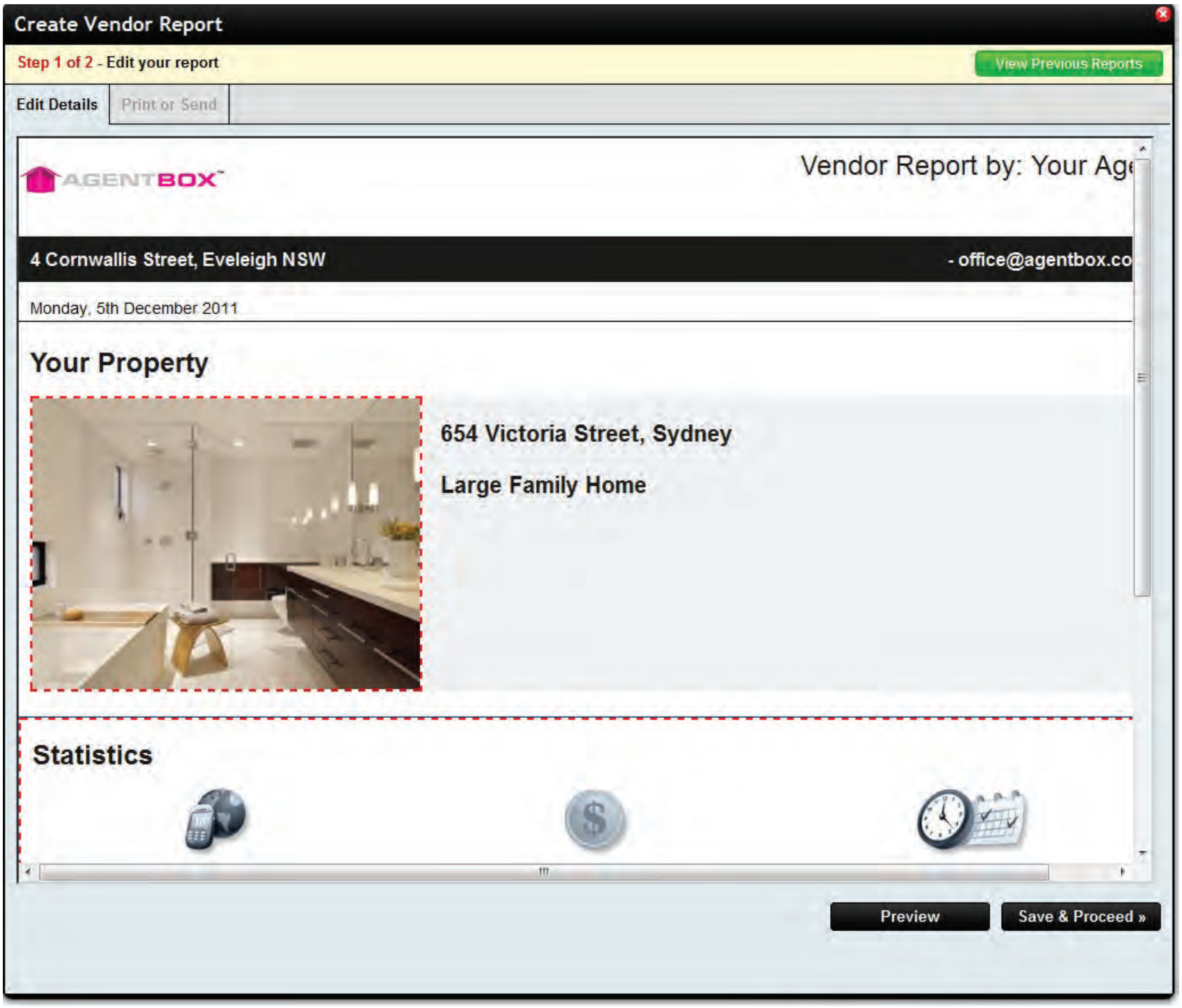
2. Click on 'Inspection & Feedback' on the left property card panel

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

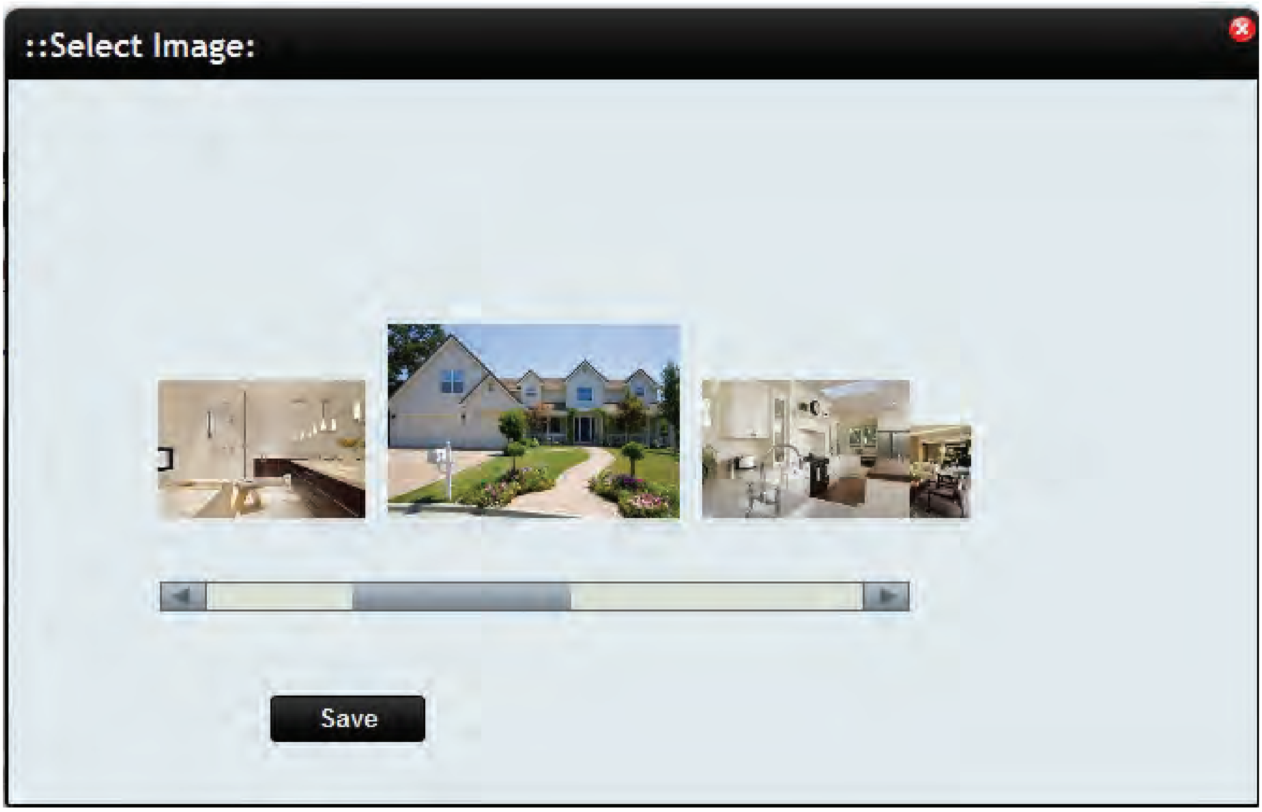


2. Click on the green ‘Feedback Report' button

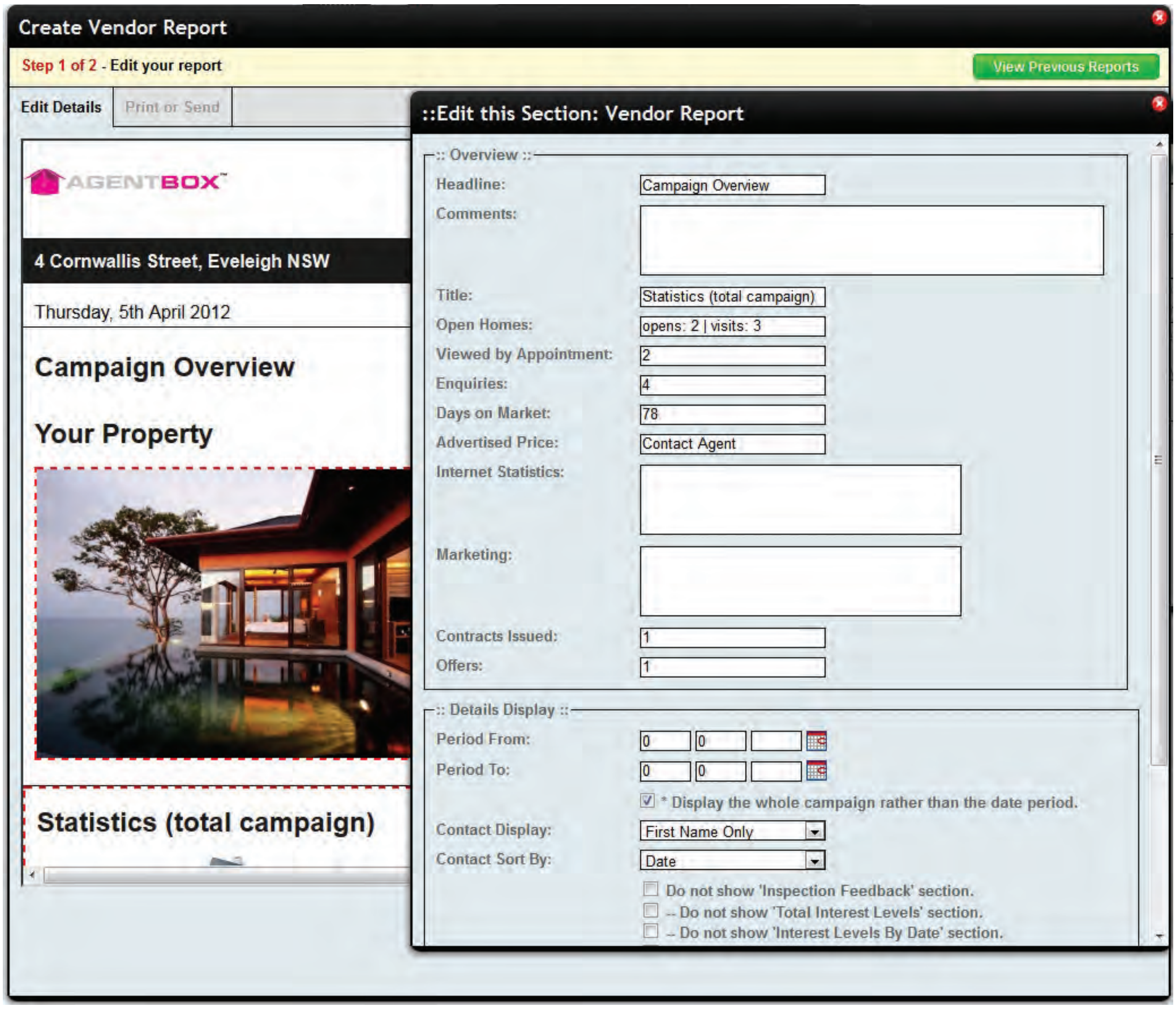
3. Your Vendor Report will appear on screen



4. Click on the photo to select a different image

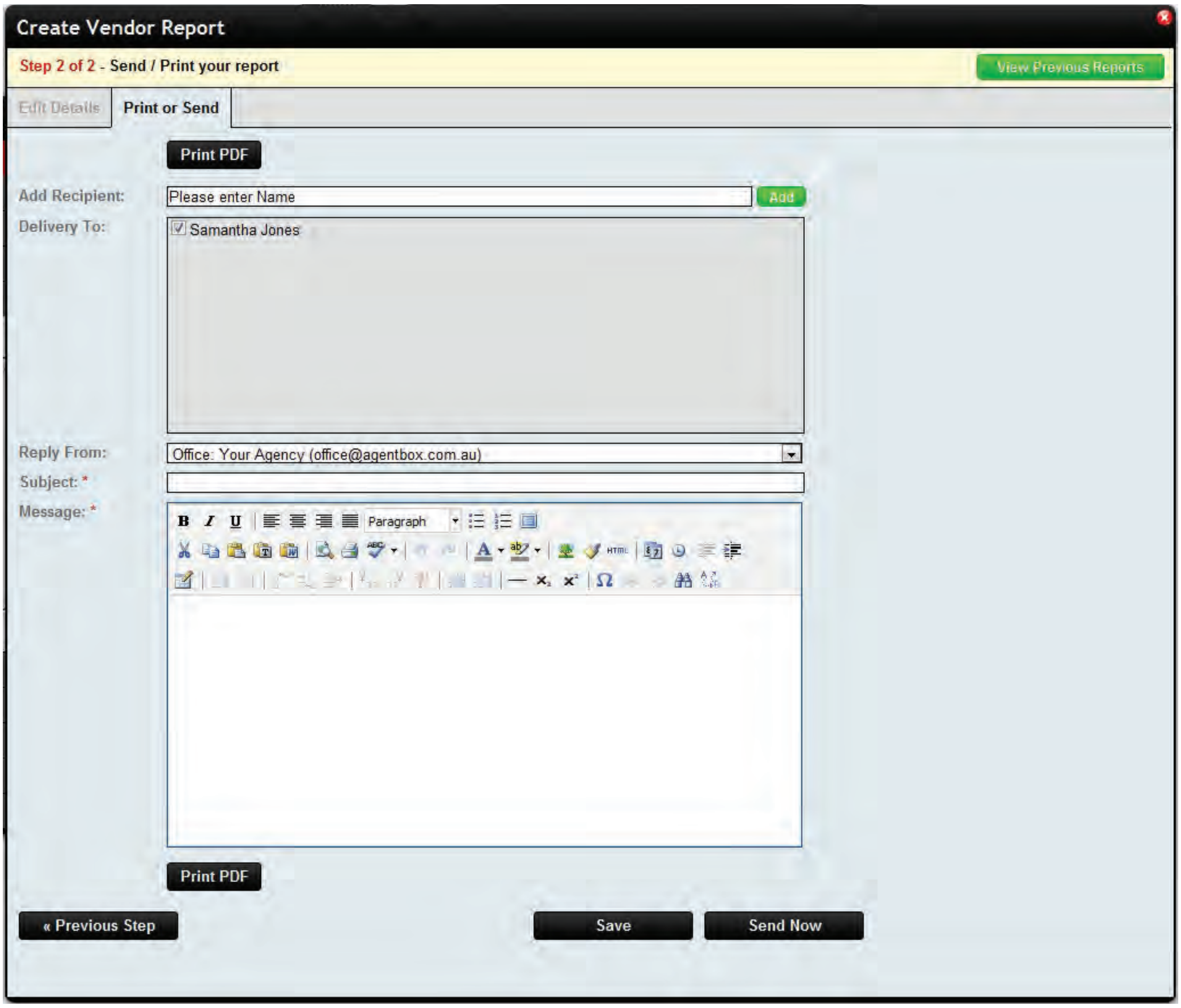


5. Click on the Feedback Statistics area to add/edit statistics, refine the display details and add comments

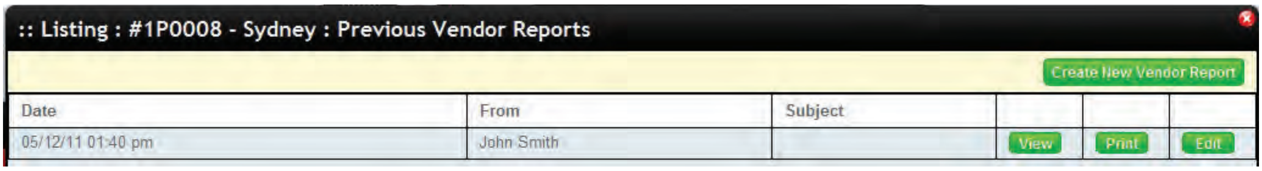


7. Buyer Feedback, Logged Enquiries, Offers Made and Contract Requests will be displayed in the report - This can be edited in the Viewers section of Buyer Feedback.
Note: your vendor report may have a different layout.

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



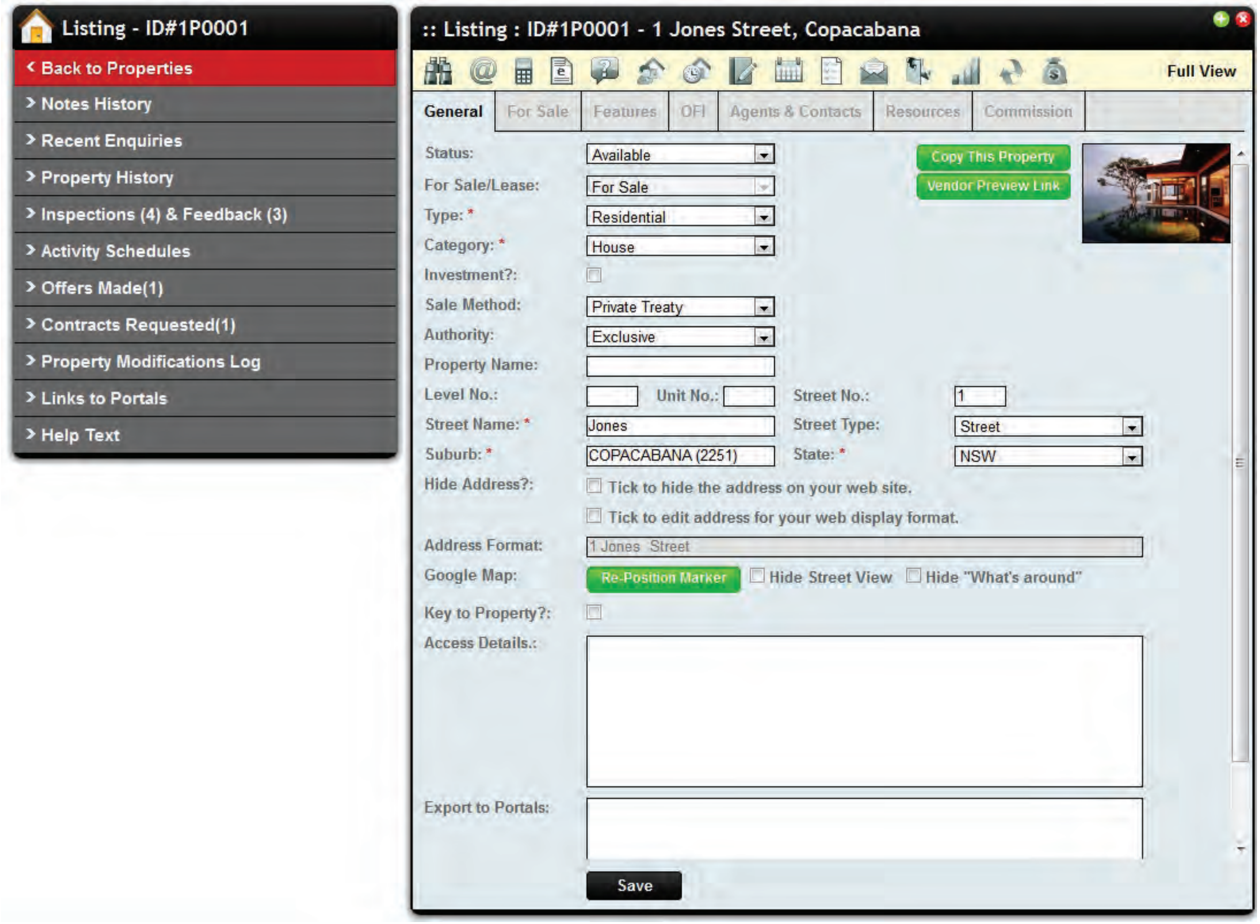
9. Click Save, to store a copy against the property which can be viewed under the green View Previous Reports button at the top right hand corner of the panel.



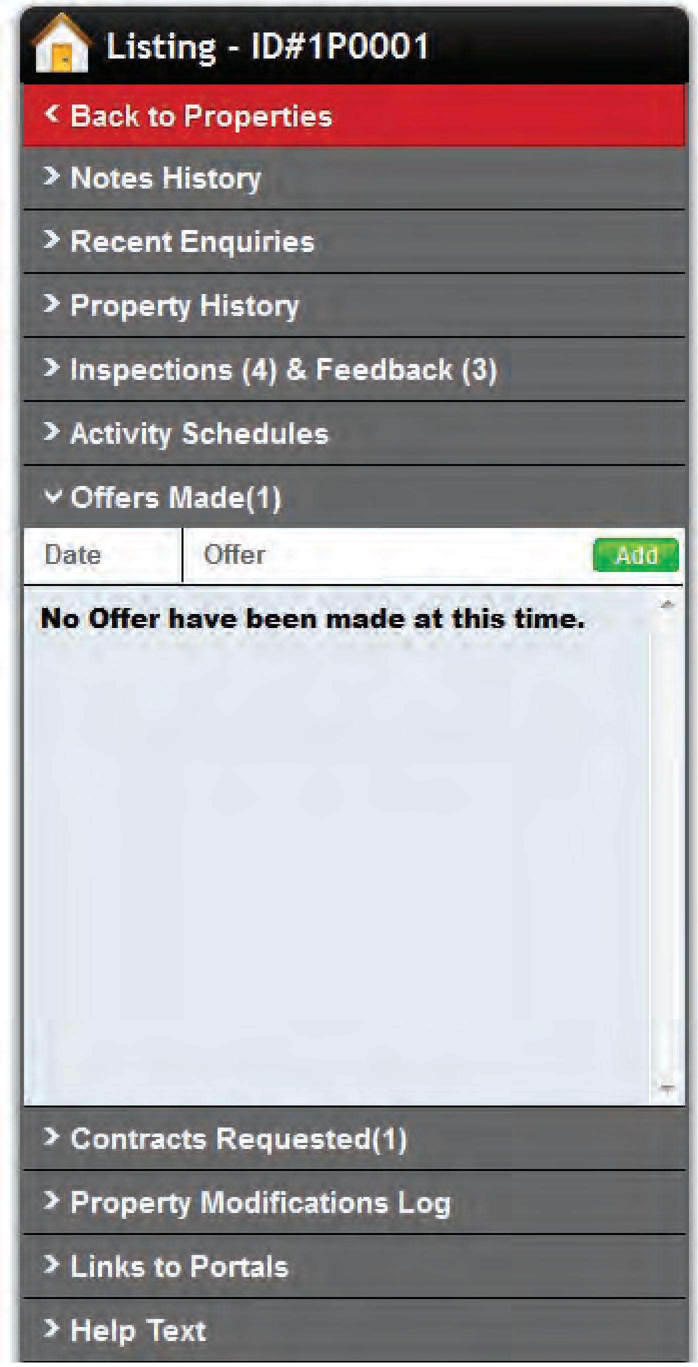
Log an Offer

How do I enter an Offer into Agentbox?

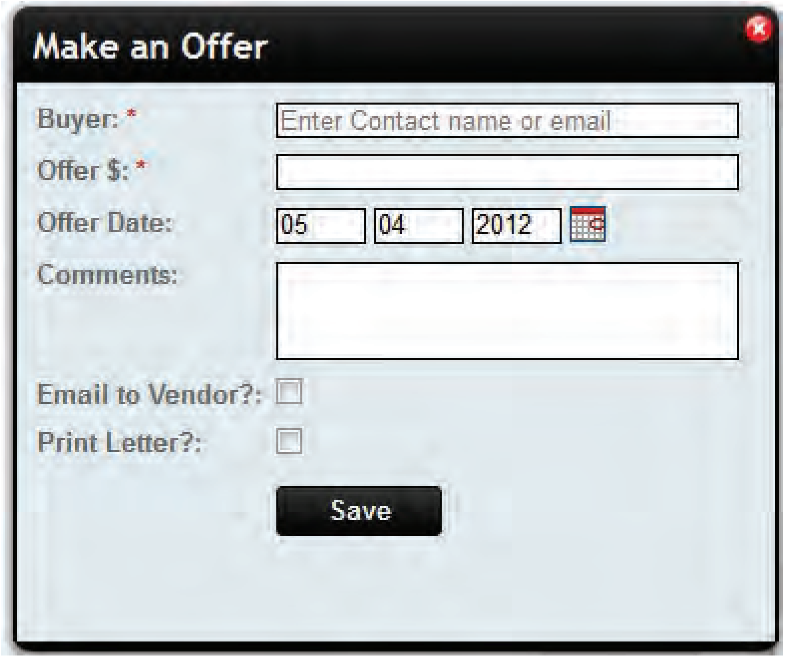
1. Search for your Property and open the Property Card



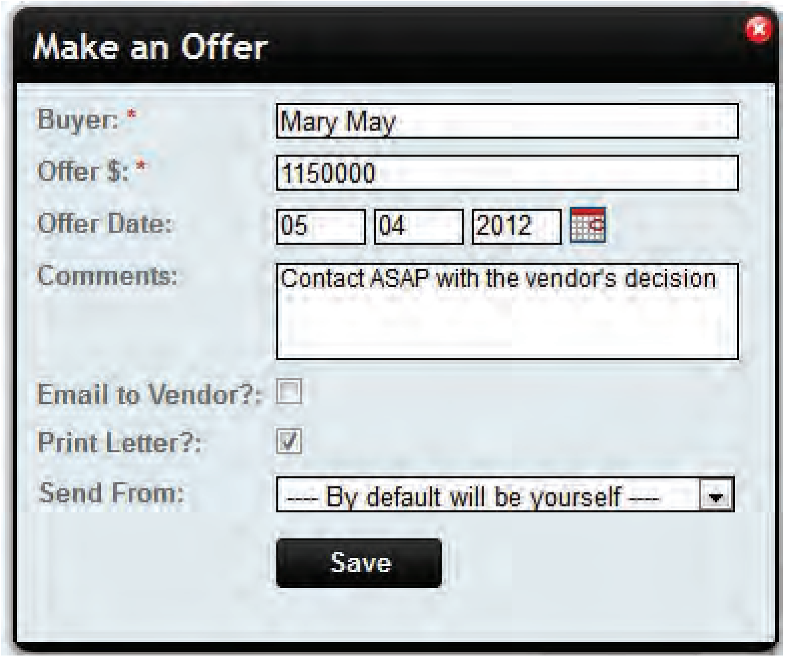
2. Click on the Offers Made tab on the Left Panel



3. Click on Add



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

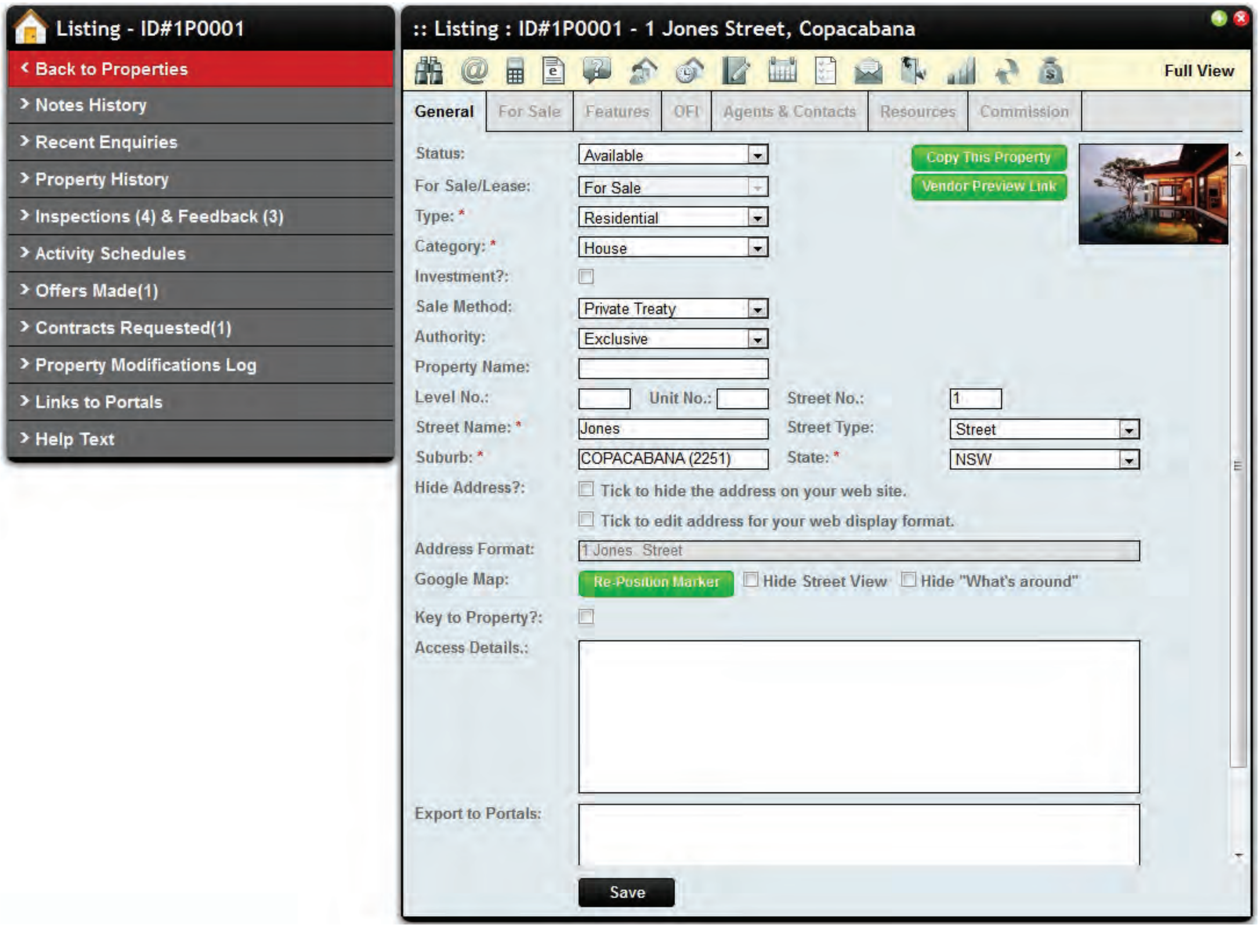


5. Select if you would like to email offer to client or generate a letter (If printing a letter you can select who to send it from).
**Note: The letter template text will be emailed to the vendor. To customise this please contact Agentbox Support at support@agentbox.com.au*

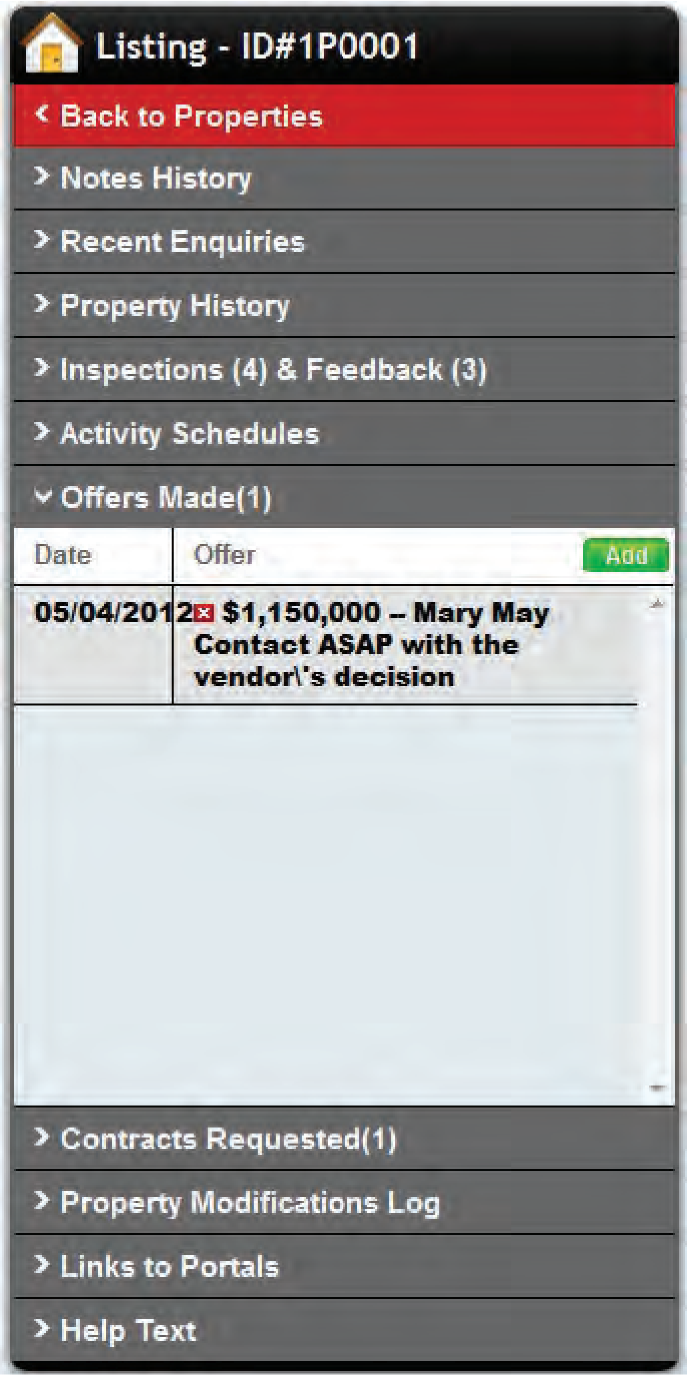
6. Click Save

How Do I View Offers Made to my Property?

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



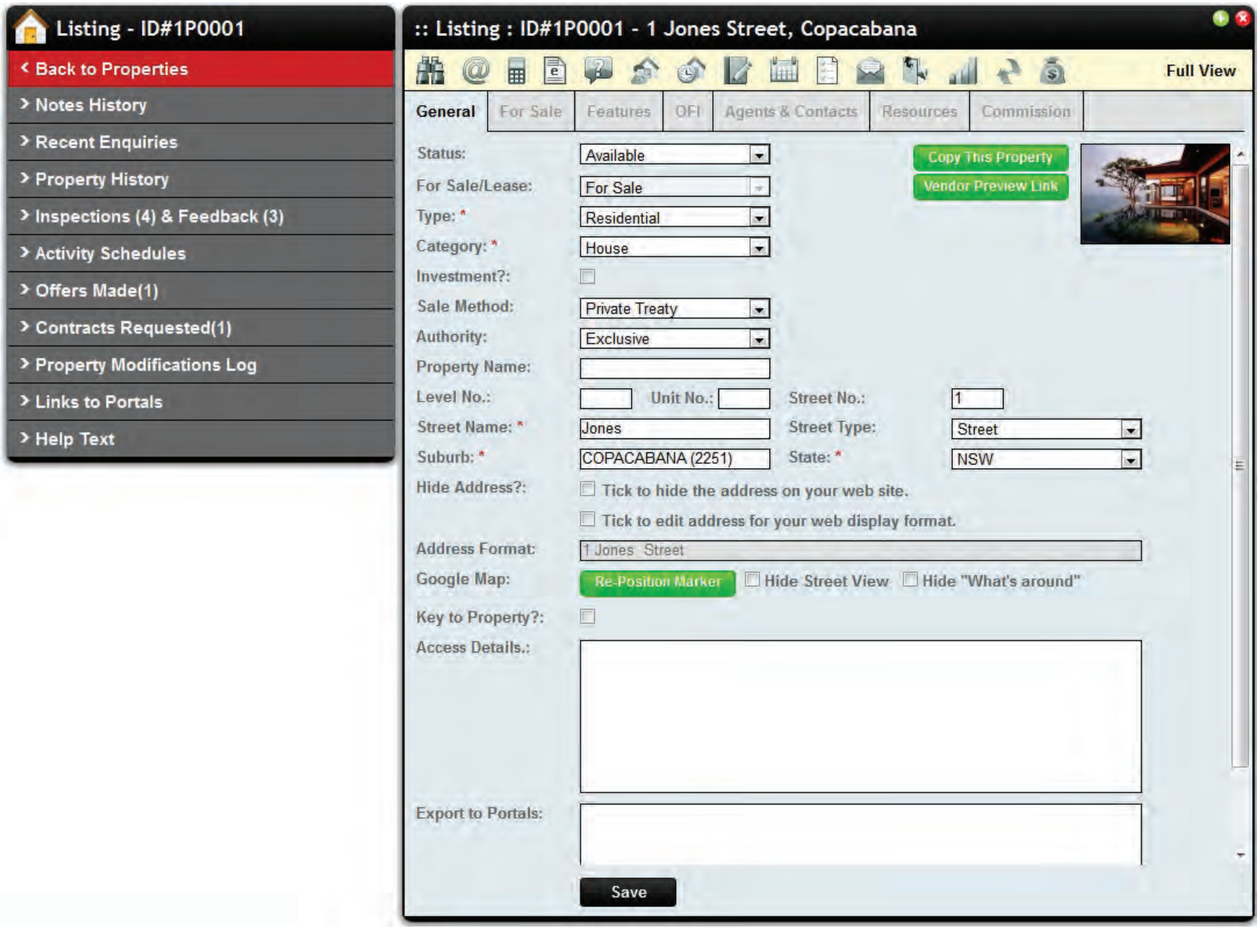
2. Click on the Offers Made tab on the Left Panel



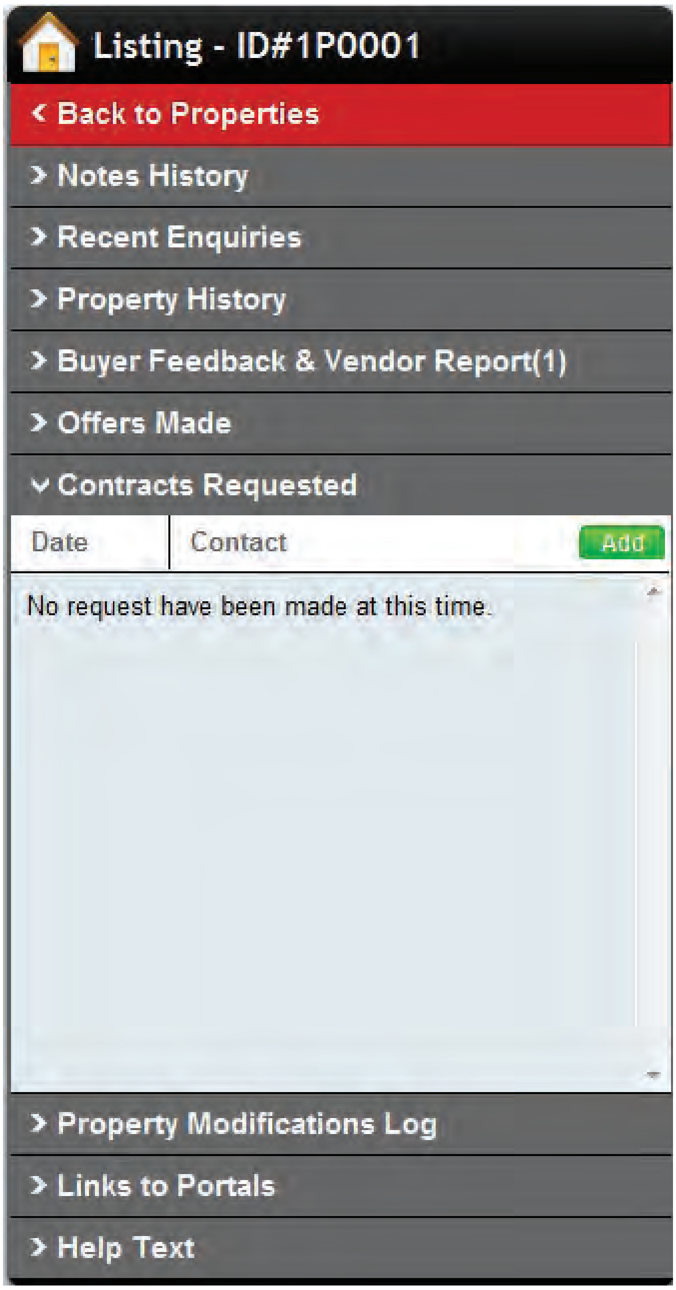
Log a Contract Request

How do I log a contract request into Agentbox?

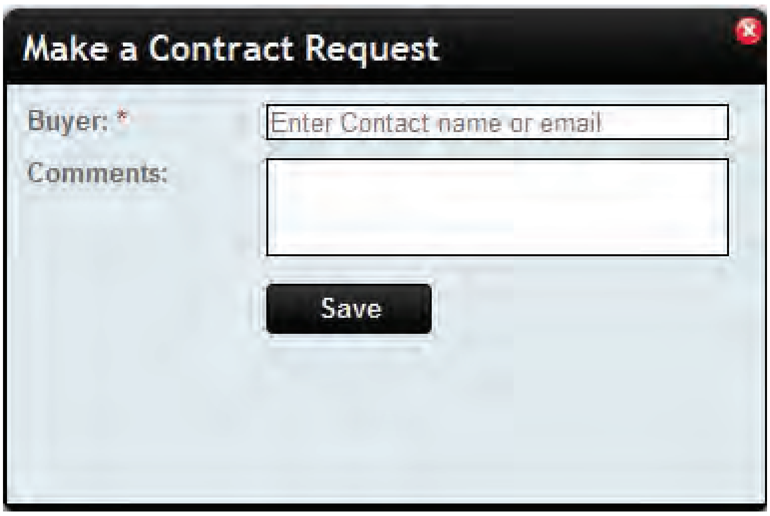
1. Search for your Property and open the Property Card



2. Click on Contracts Requested tab on the Left Panel



3. Click on Add

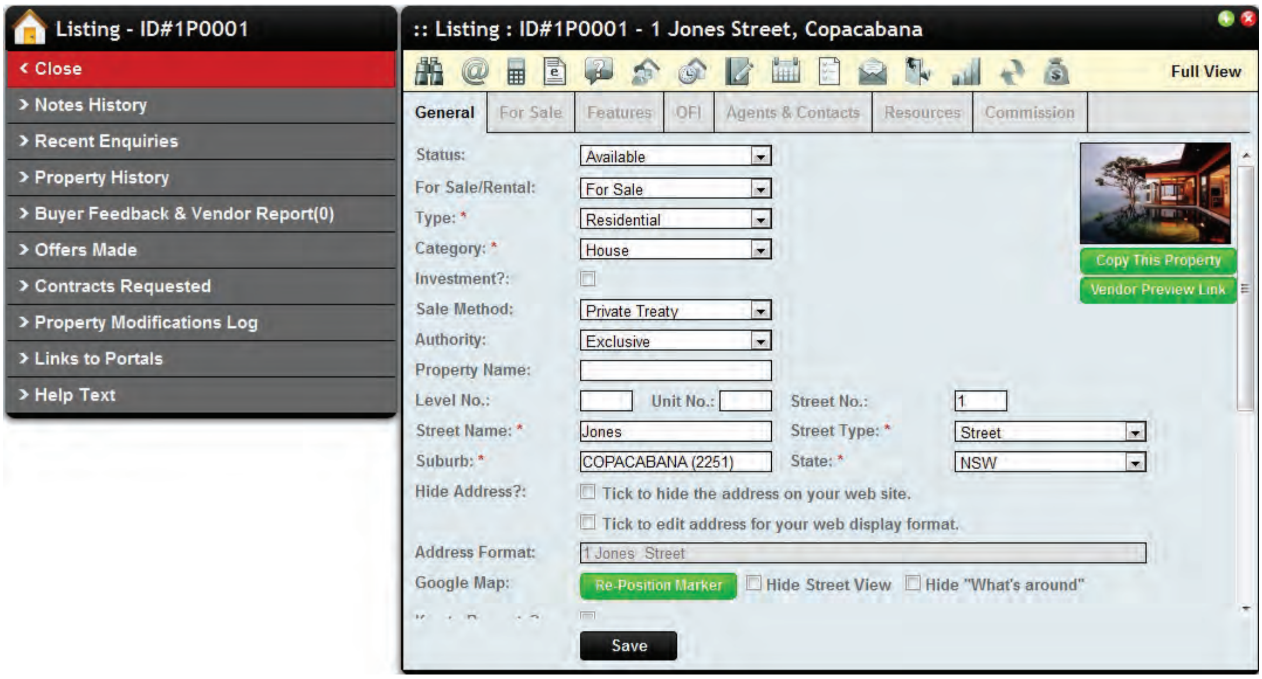


4. Enter Buyer Name and Comments

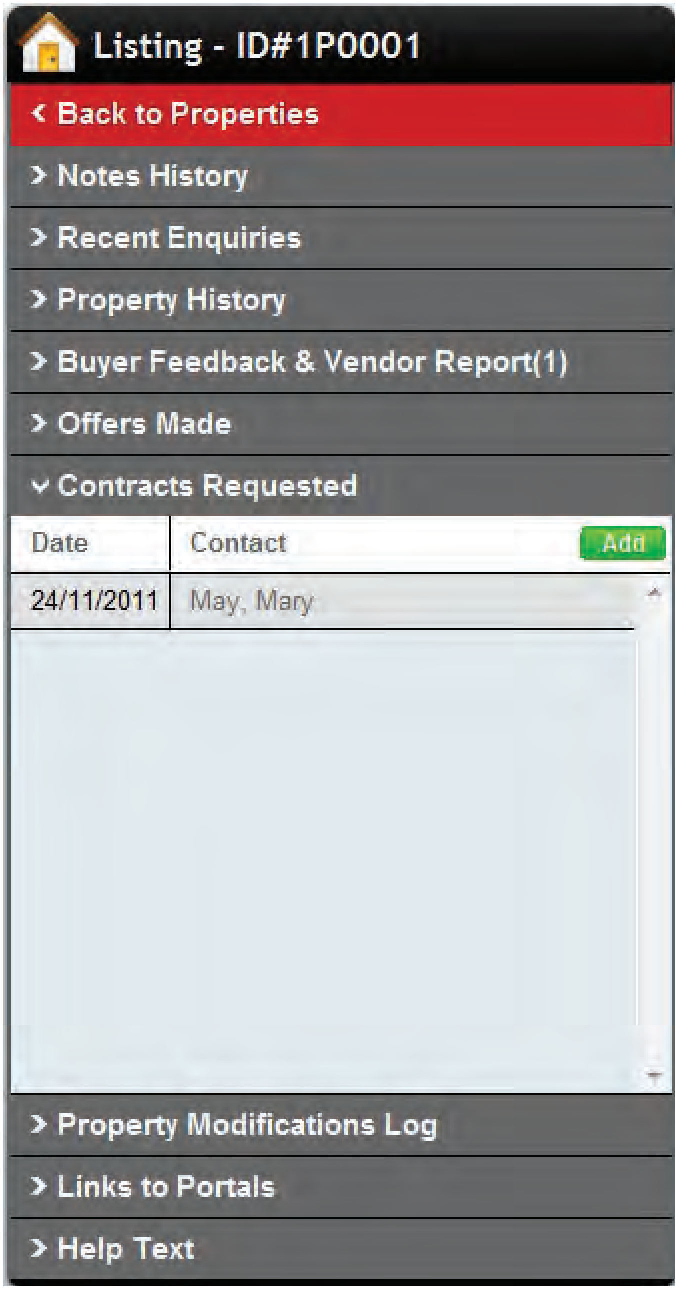
5. Click on Save, this will log a copy of this request against the property and also create a task for the listing agent.

How Do I View Contract Requests?

1. Search for your Property and open the Property Card



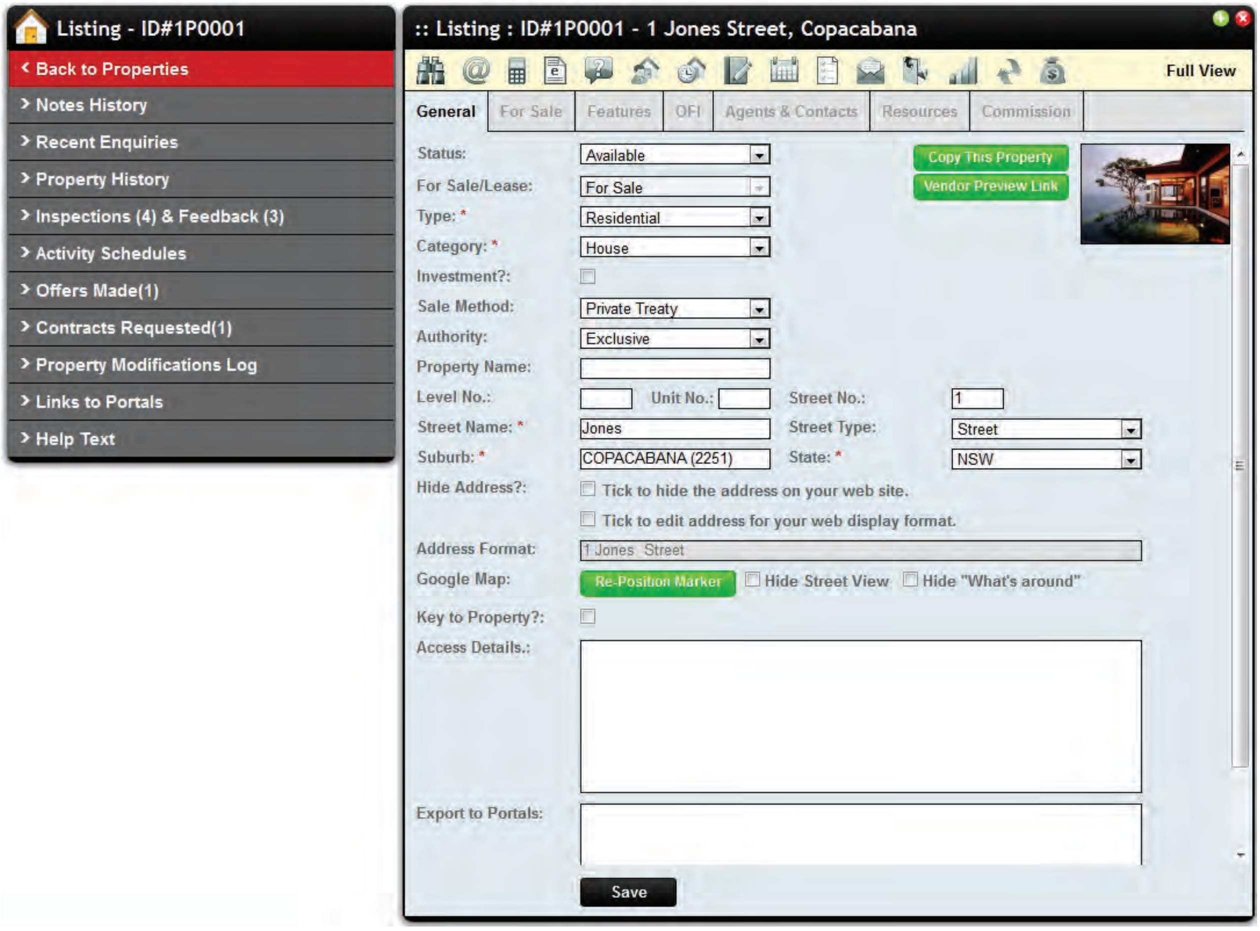
2. Click on the Contracts Requested tab on the Left Panel



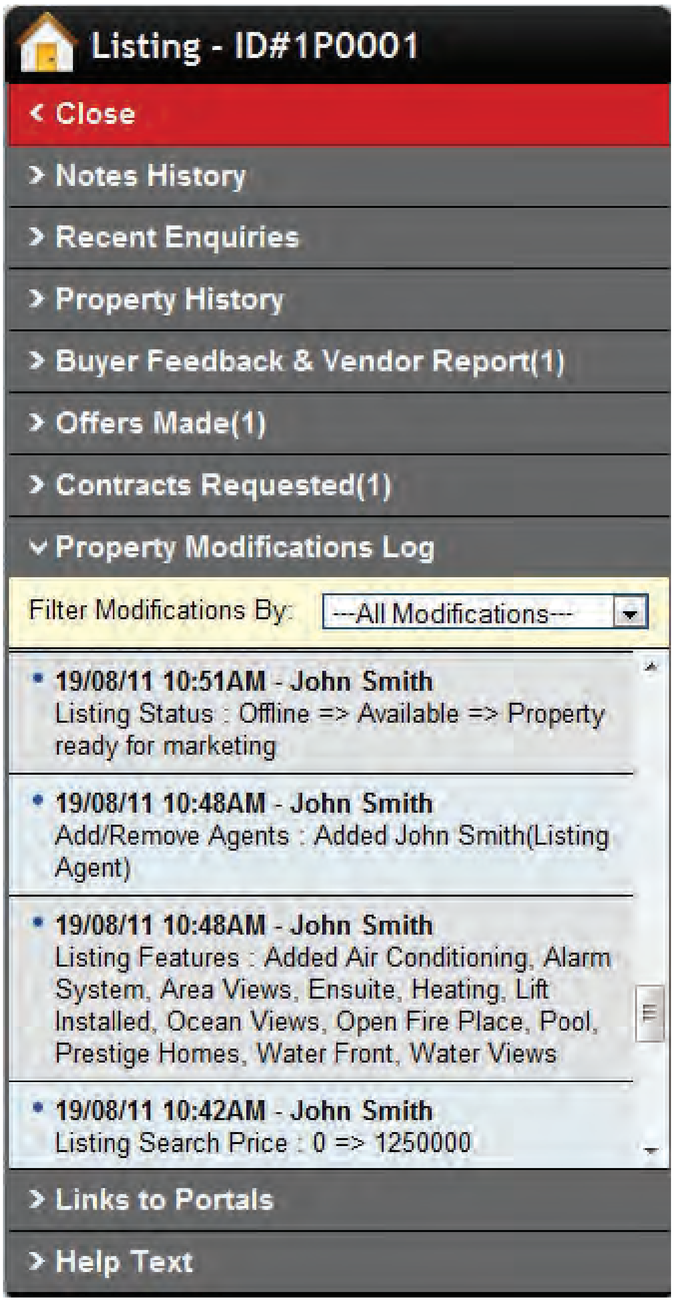
View Property Modifications

View Property Modifications

1. Search for your Property and open the Property Card



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).

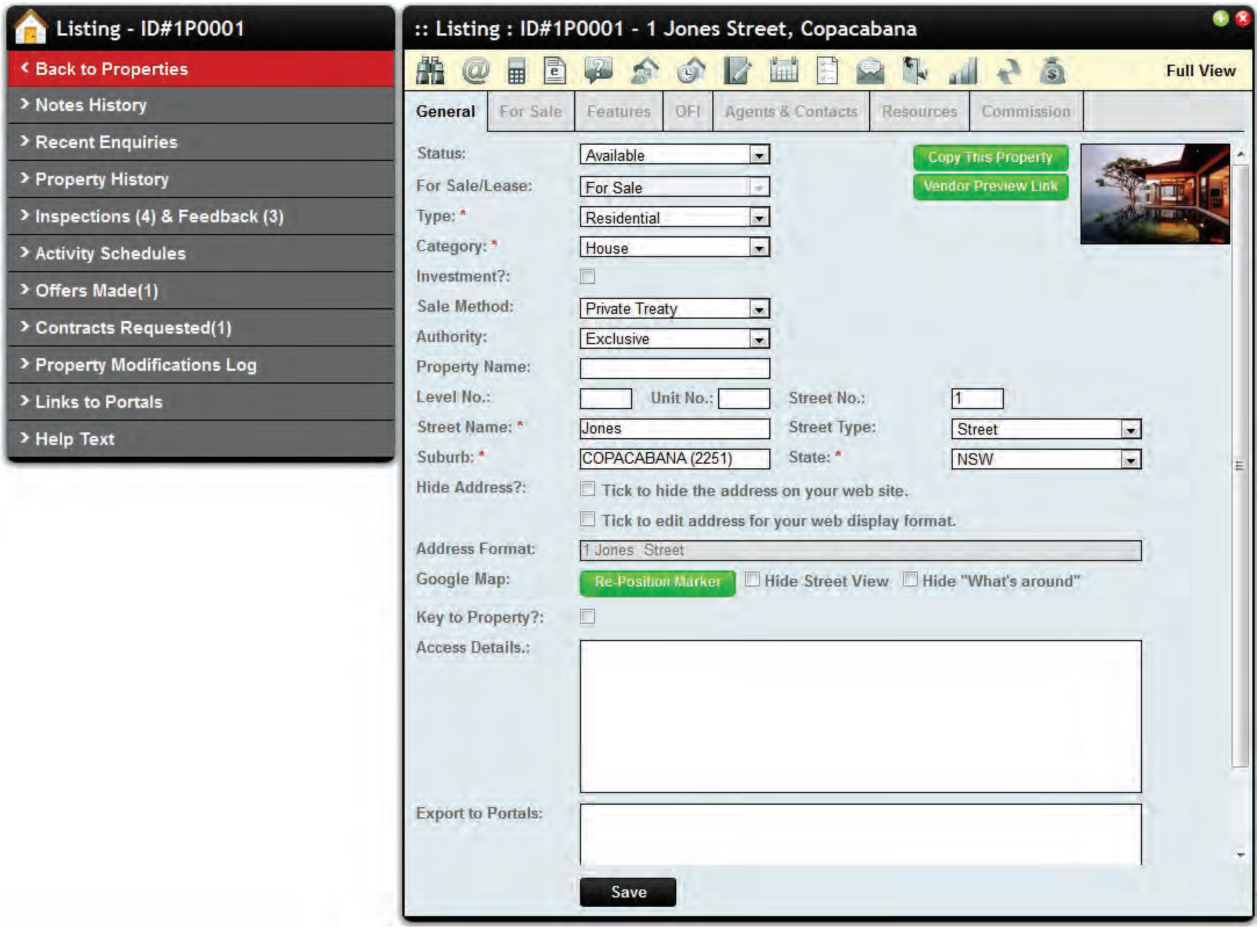


3. You can refine the changes using the drop down menu e.g. Export to Portals

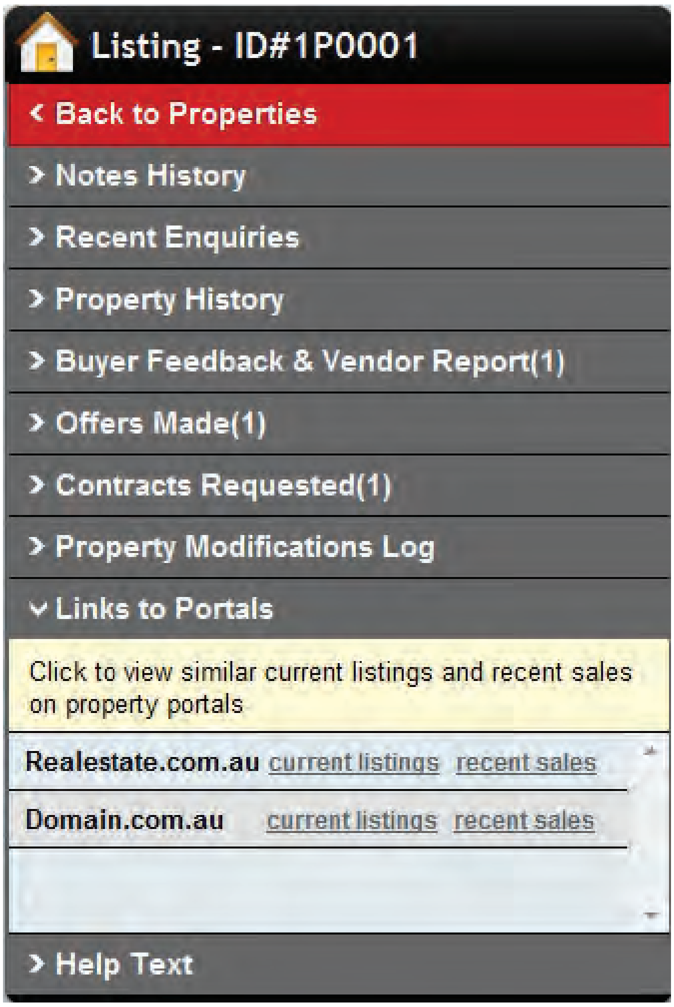
Conduct CMA

Conduct a Comparative Market Analysis (CMA)

1. Search for your Property and open the Property Card



2. Click on Links to Portals on the Left Property Panel (If the matching left panel is not visible, click Full View in the top right hand corner of the property card).



3. Click on the page you would like to open, e.g. recent sales on realestate.com.au and this will open in a new browser tab or window. It will conduct a search through the portal based on the suburb and search price of the property or appraisal price if appraisal and prospecting price if prospect.

4. Close the browser tab, or window to return to Agentbox.

Commission

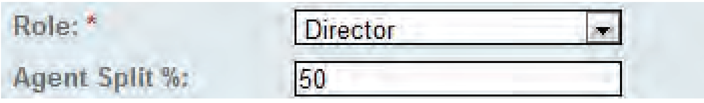
How do I log commissions in Agentbox

The commissions template in Agentbox is customisable to tailor to your commission needs. We have outlined two scenarios below to demonstrate how you can change the template to get the results you need.

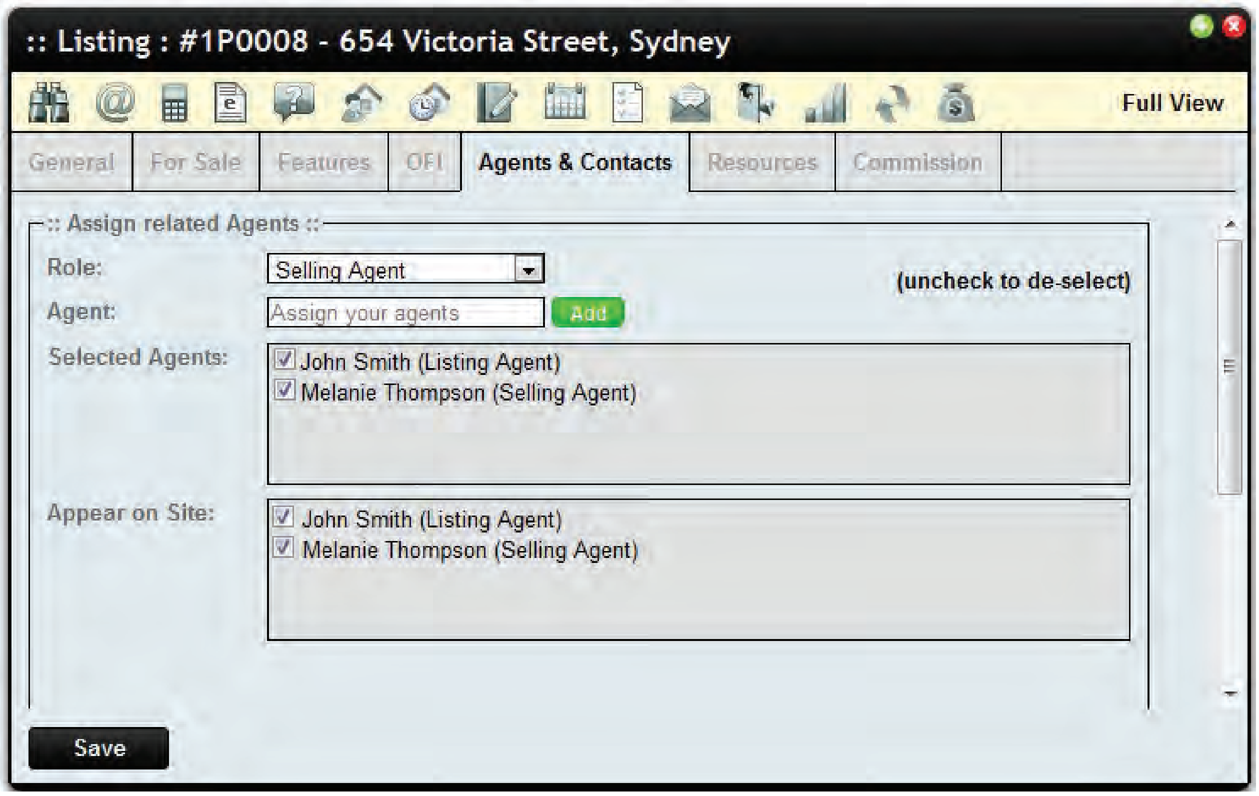
Scenario 1.
This method is used if the commission is calculated per agent based on a fixed % split of earnings with the office.

E.g. John gets 50% of all sales and the office gets 50% ***or***
John listed a property however Melanie was the selling agent so John is entitled to 70% of the Gross commission for listing the property. Of that 70% he receives 50% and the office receives 50%

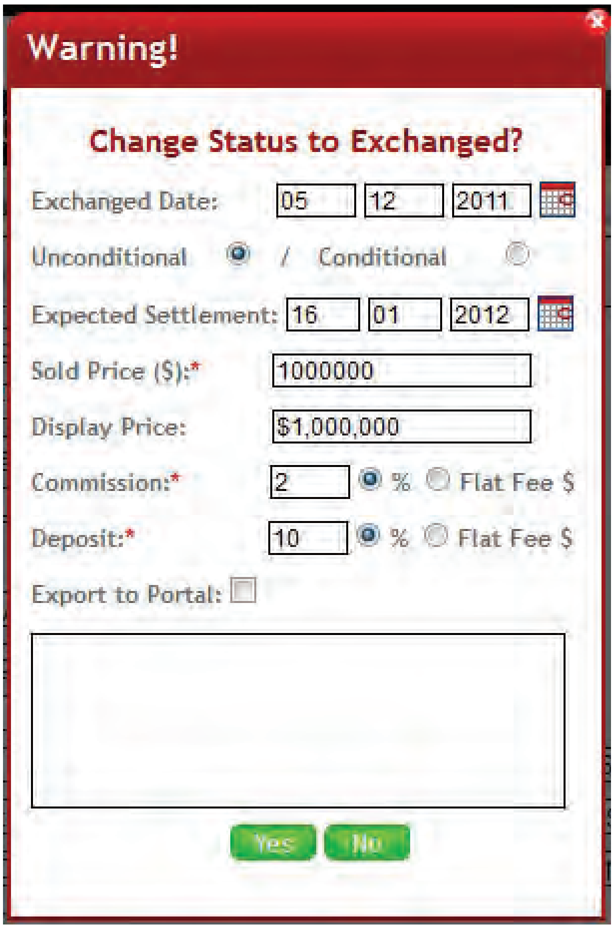
1. Search for your Property and open the Property Card and select the commissions tab.
2. Ensure the Agents percentage split with the office is set up in their staff card in this example 50%



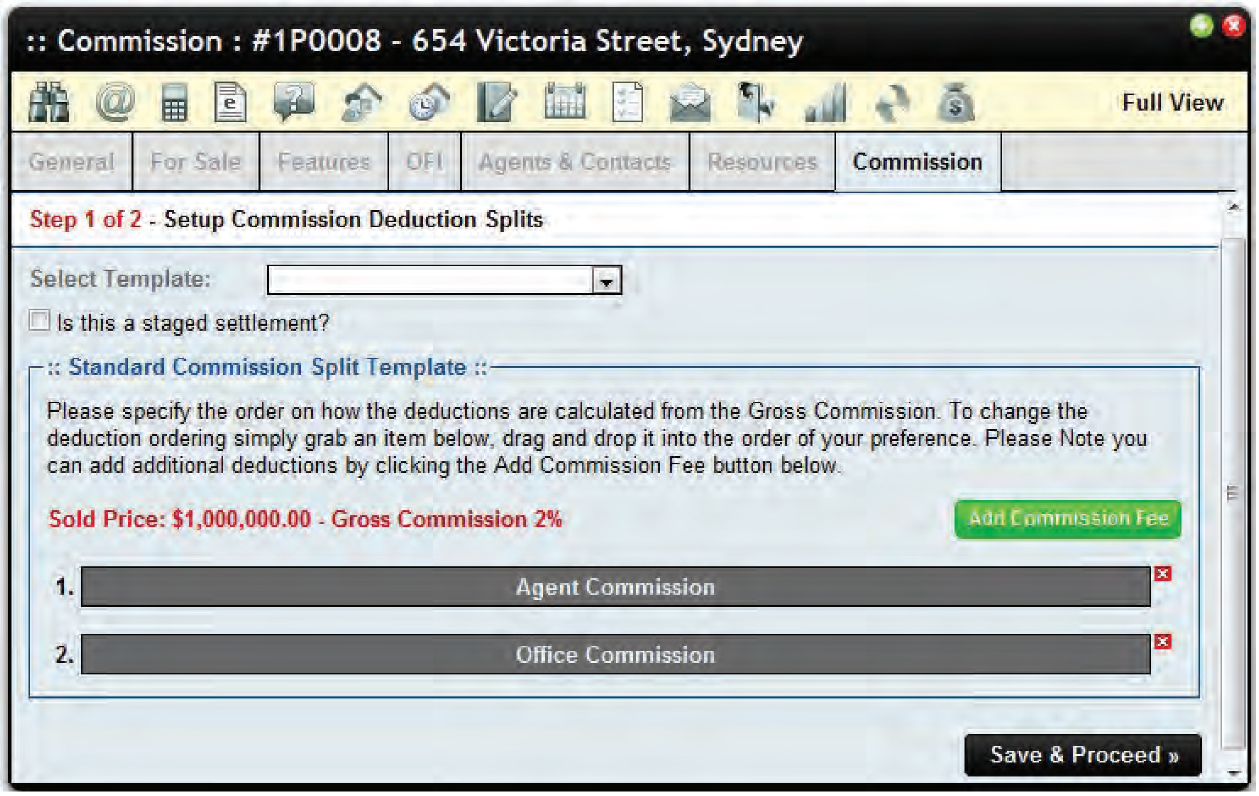
3. Ensure the Listing Agent, Selling Agent and any referral Agents are added to the Agents and Contacts tab on the property card.



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

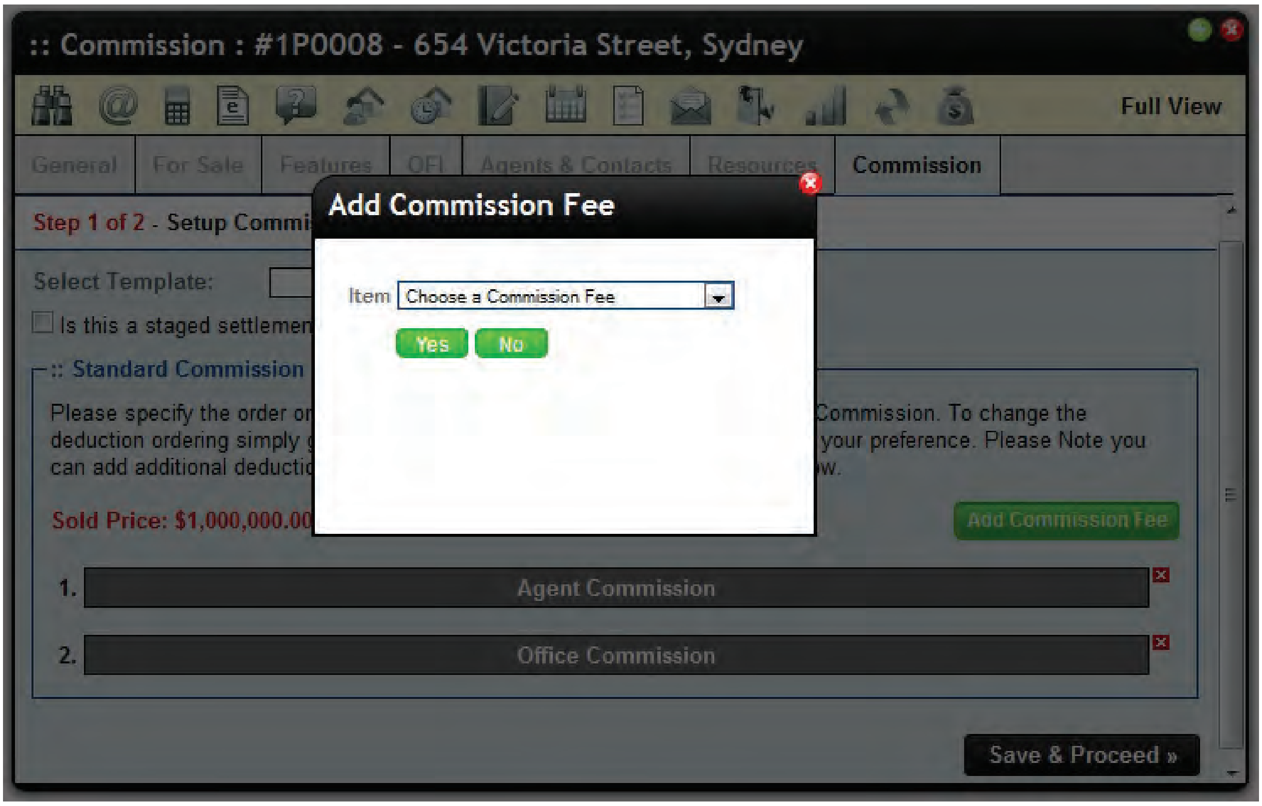


5. Click on the Commission Tab on the property card.



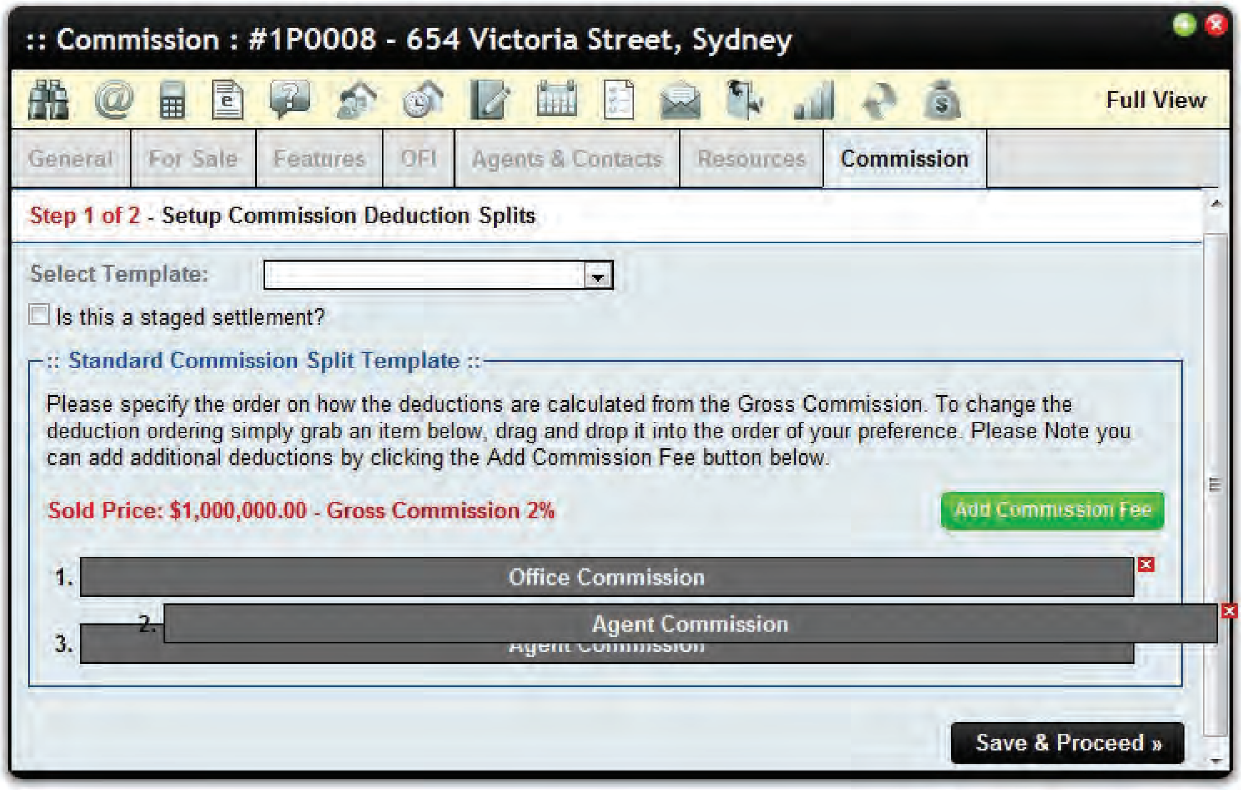
6. To add in another fee e.g. advertising fee, referral fee etc. (Not used in this example)

- Click the green Add Commission Fee button
- Select Advertising Fee from the drop down menu
- Click Yes to insert
-

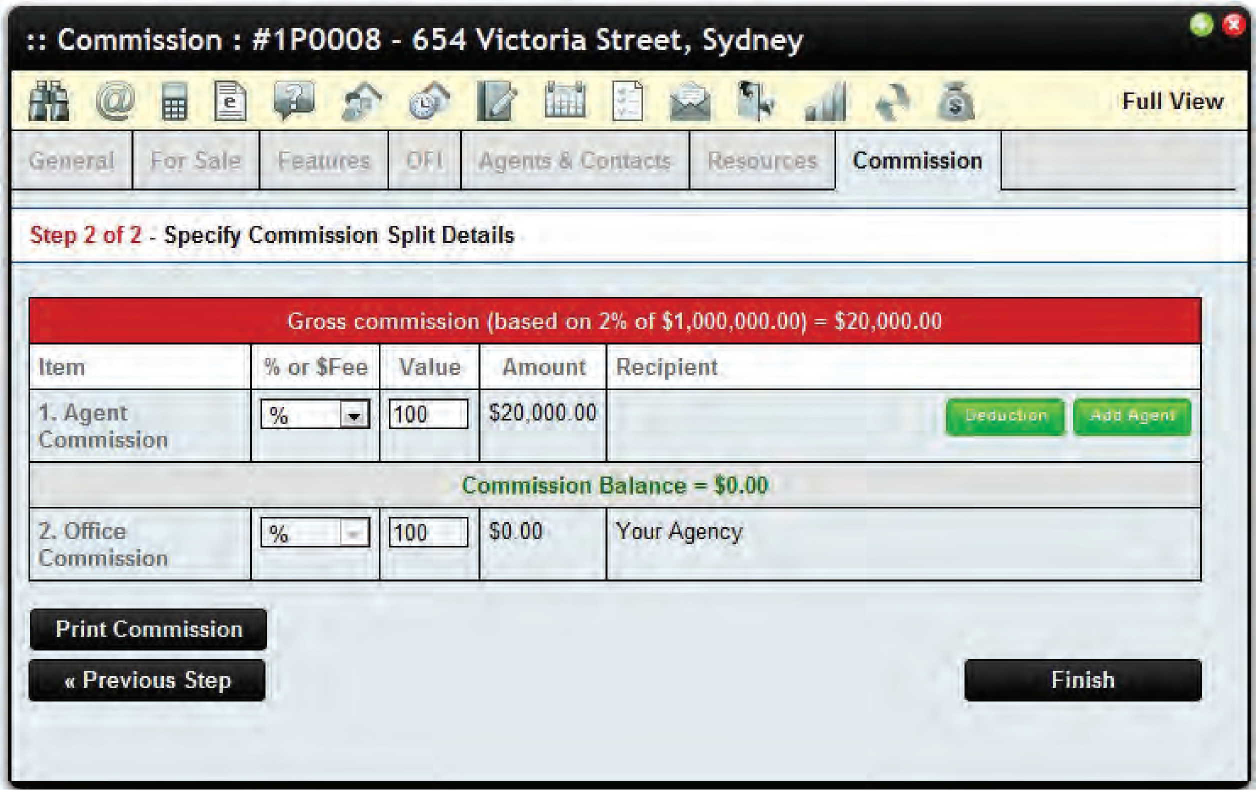


7. Re-order the fees by dragging and dropping into the required order. In this example we are not adding any additional fees so leave in the normal order.

- 1. Agent Commission
- 2. Office Commission

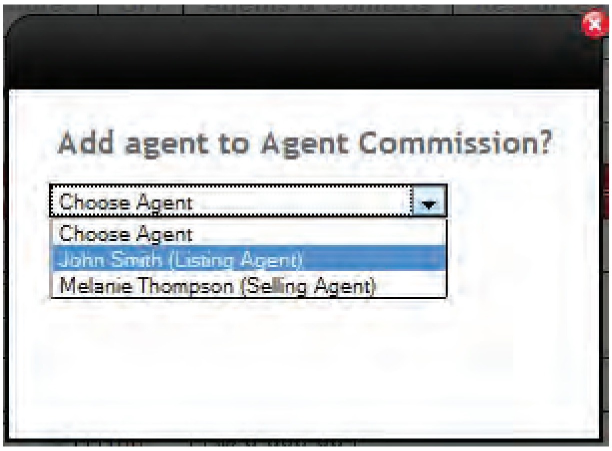


8. Click Save and Proceed to enter the Agent Commission.



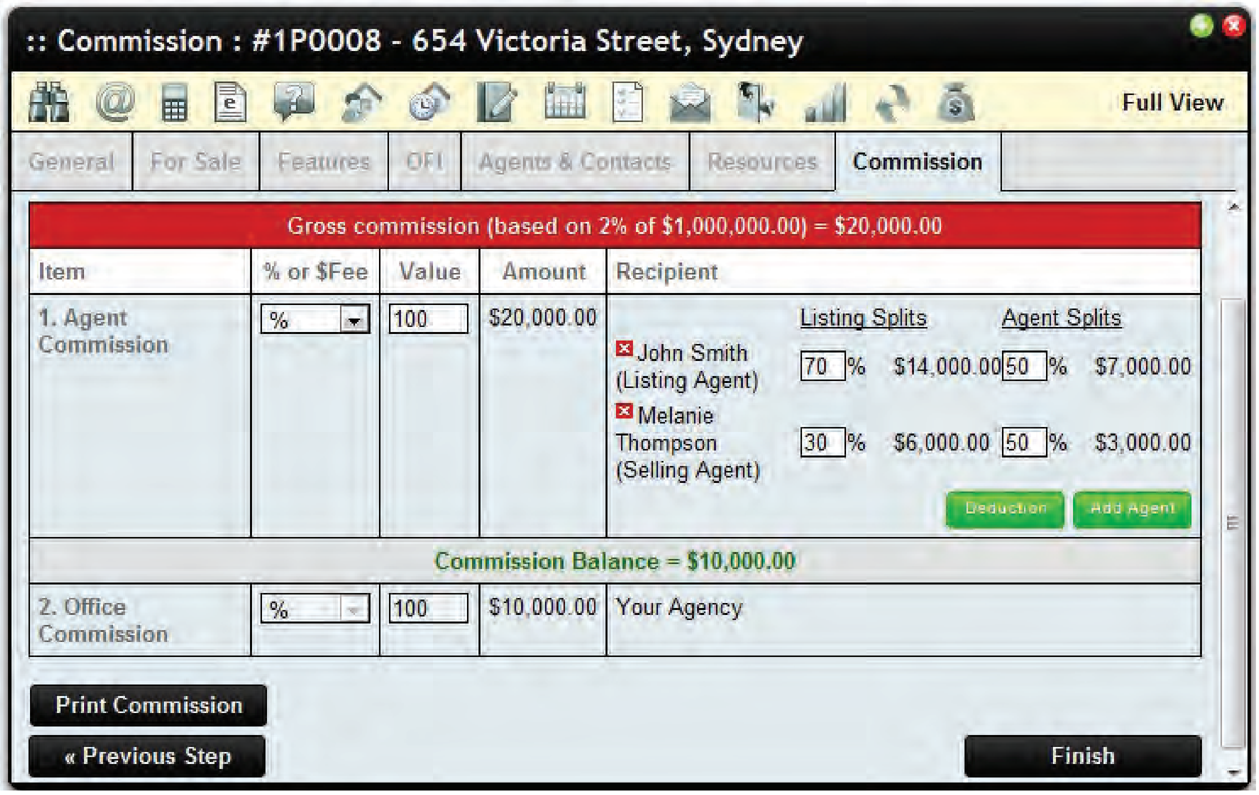
1. Agent Commission -

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

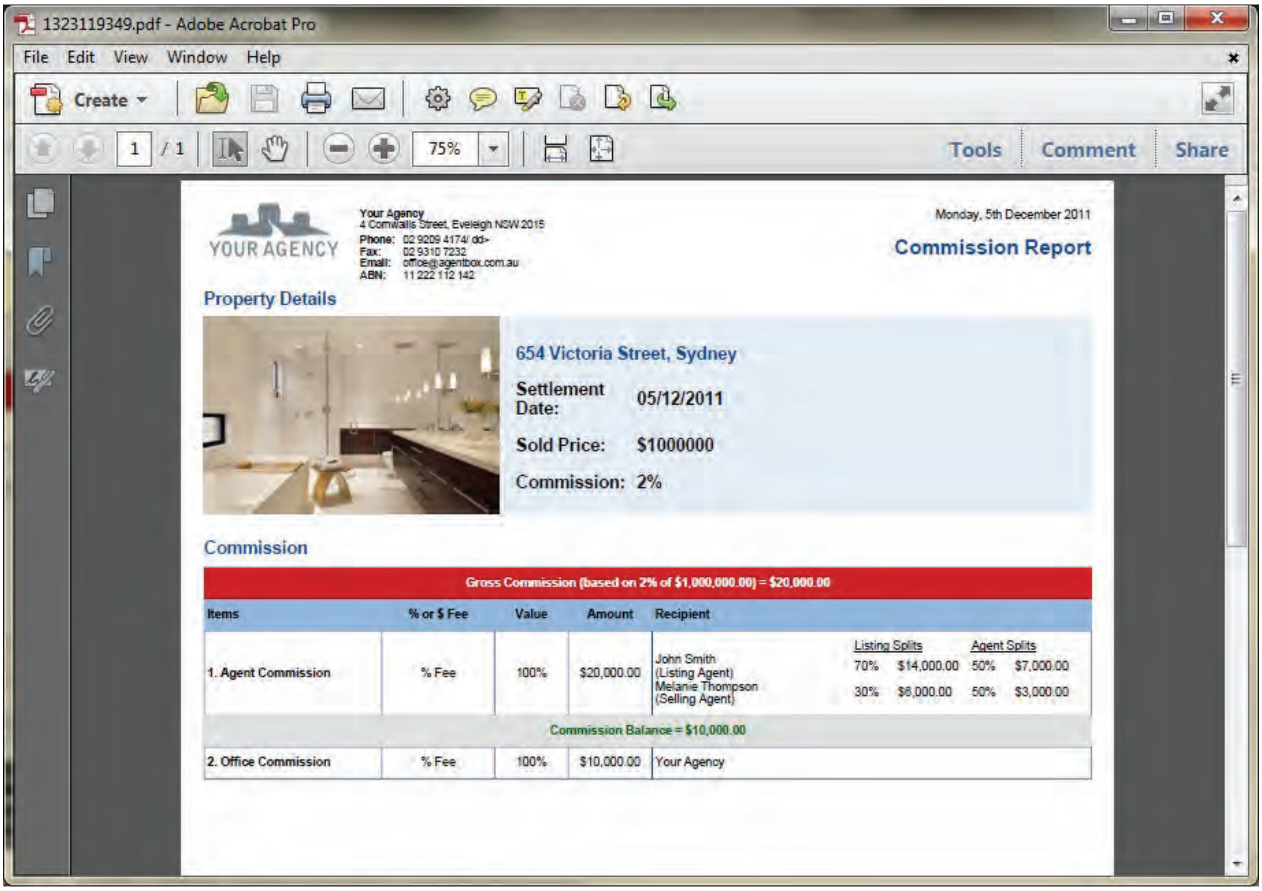


- Enter the percentage each agent receives for their part of the sale in the listing splits column (first column) In this example 70% for listing and 30% for selling.
- In the third column you will notice the agents split with the office appears. This is the fee you have set up in their staff card. So in this example John received 70% of the Gross commission for listing the property, but of that 50% goes to him and the remaining 50% goes back to the office balance.

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



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



YOUR AGENCY

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

Monday, 5th December 2011

Commission Report

Property Details

654 Victoria Street, Sydney

Settlement Date: 05/12/2011

Sold Price: $1000000

Commission: 2%

Commission

Gross Commission (based on 2% of $1,000,000.00) = $20,000.00

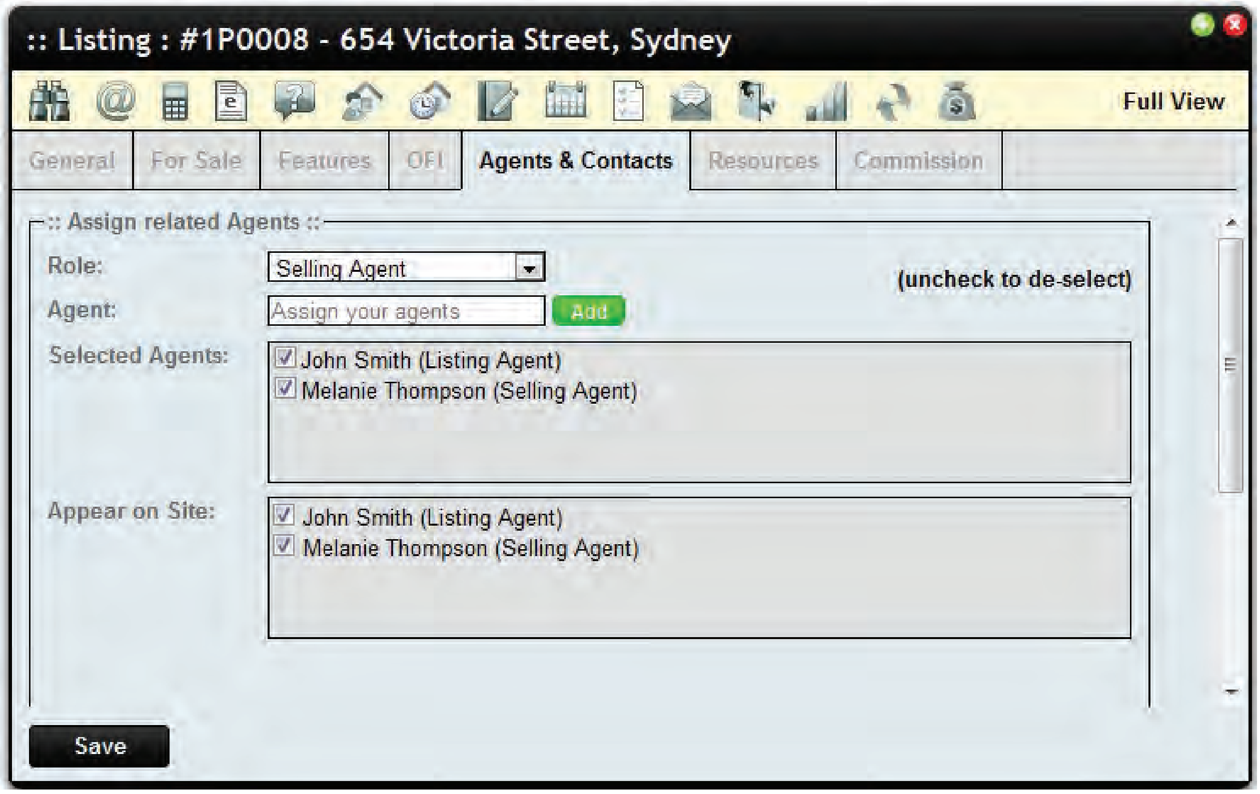
Items	% or $ Fee	Value	Amount	Recipient	Listing Splits		Agent Splits	
1. Agent Commission	% Fee	100%	$20,000.00	John Smith (Listing Agent)	70%	$14,000.00	50%	$7,000.00
				Melanie Thompson (Selling Agent)	30%	$6,000.00	50%	$3,000.00
Commission Balance = $10,000.00								
2. Office Commission	% Fee	100%	$10,000.00	Your Agency				

Scenario 2.

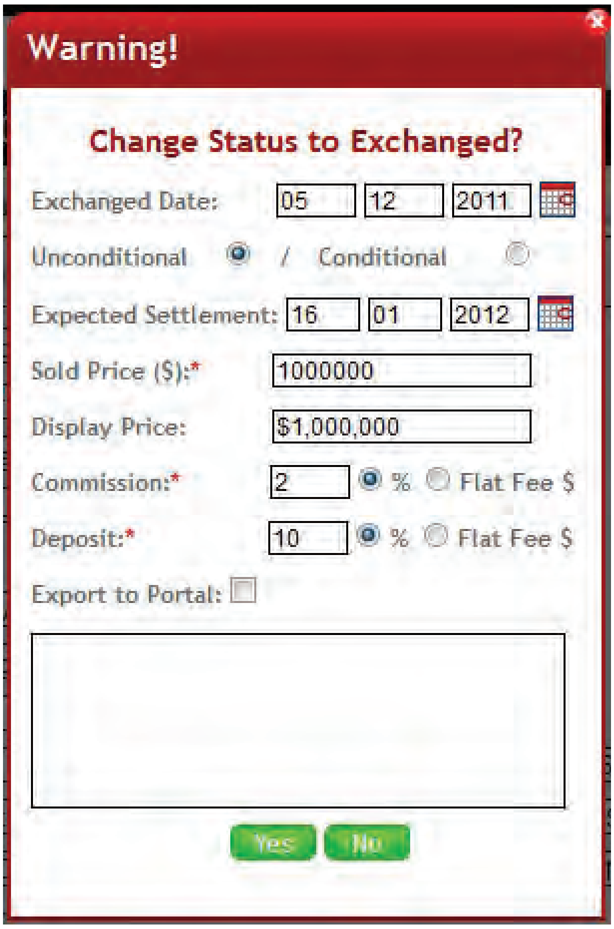
The office always takes a flat fee or fixed % of every sale, the remaining commission is then split up between the Listing and Selling Agent using a percentage split.

1. Search for your Property and open the Property Card and select the commissions tab.
2. Ensure the Agents percentage split in their staff card is **100%** in their staff card.

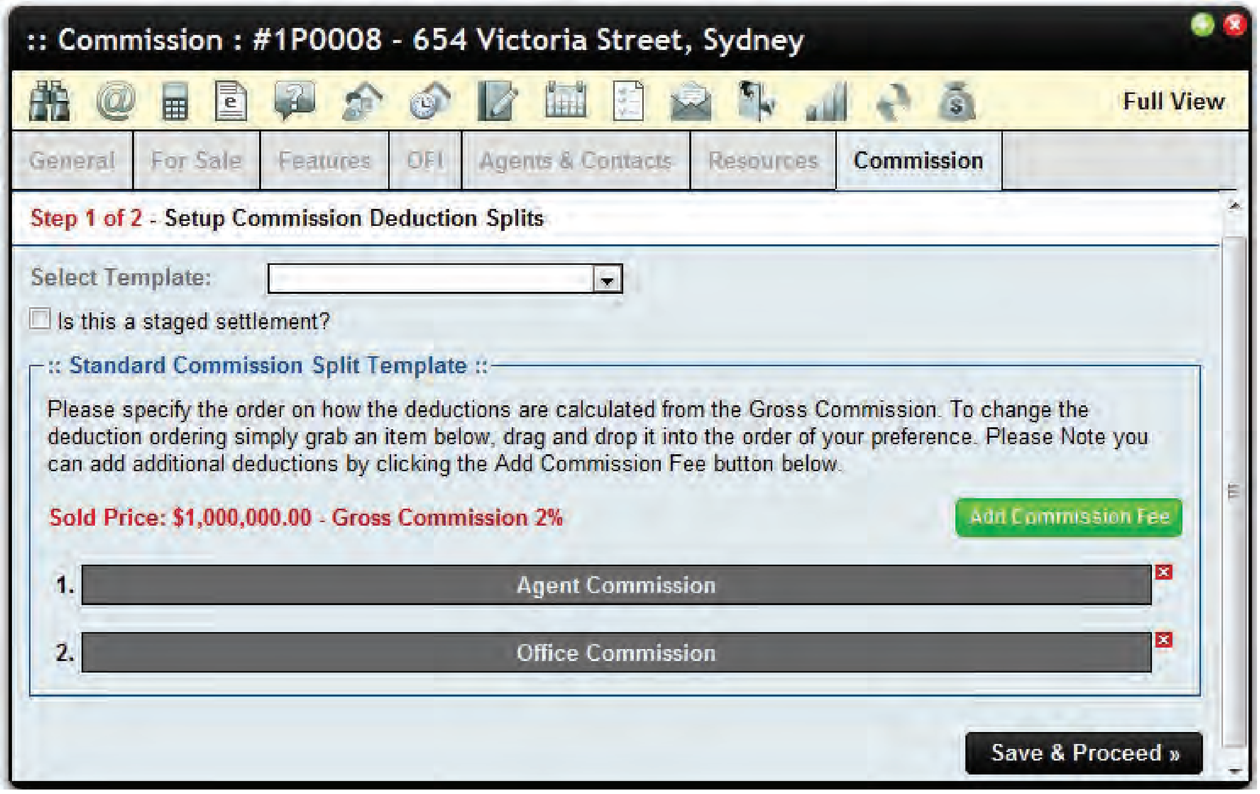
3. Ensure the Listing Agent, Selling Agent and any Referral Agents are added to Agents and Contacts tab on the property card.



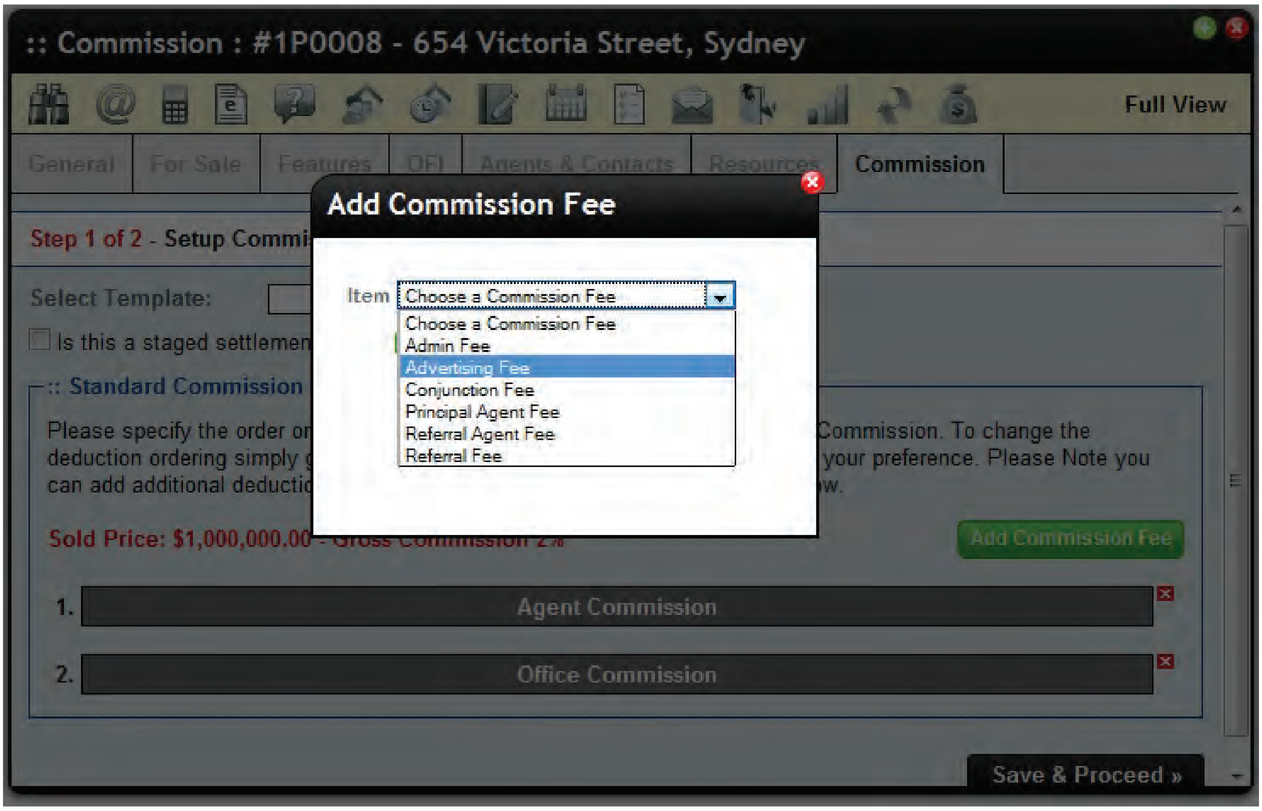
4. Ensure all the property sale details e.g. Sale price and commission fee or % have been added to the property status



5. Click on the Commission Tab

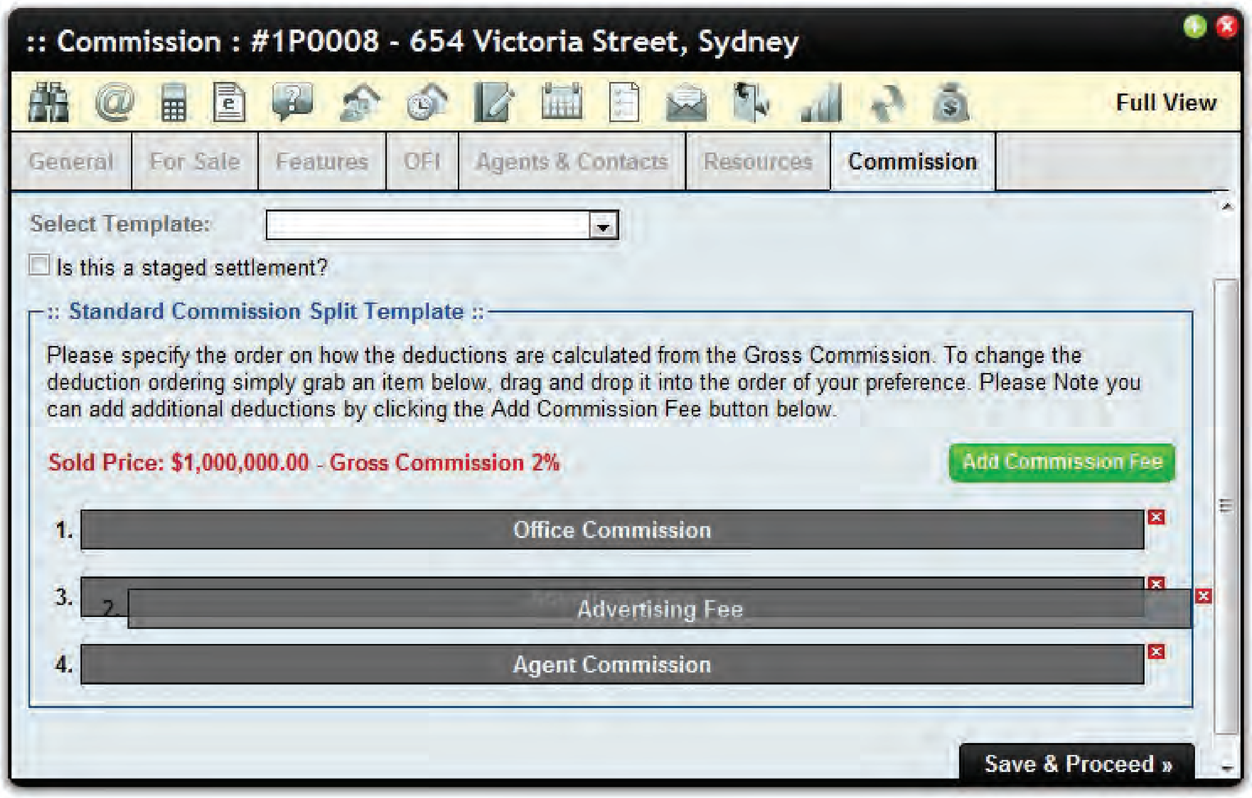


6. To add in an additional fee, in this example an advertising fee
   - Click the green Add Commission Fee button
   - Select Advertising Fee from the drop down menu
   - Click Yes to insert



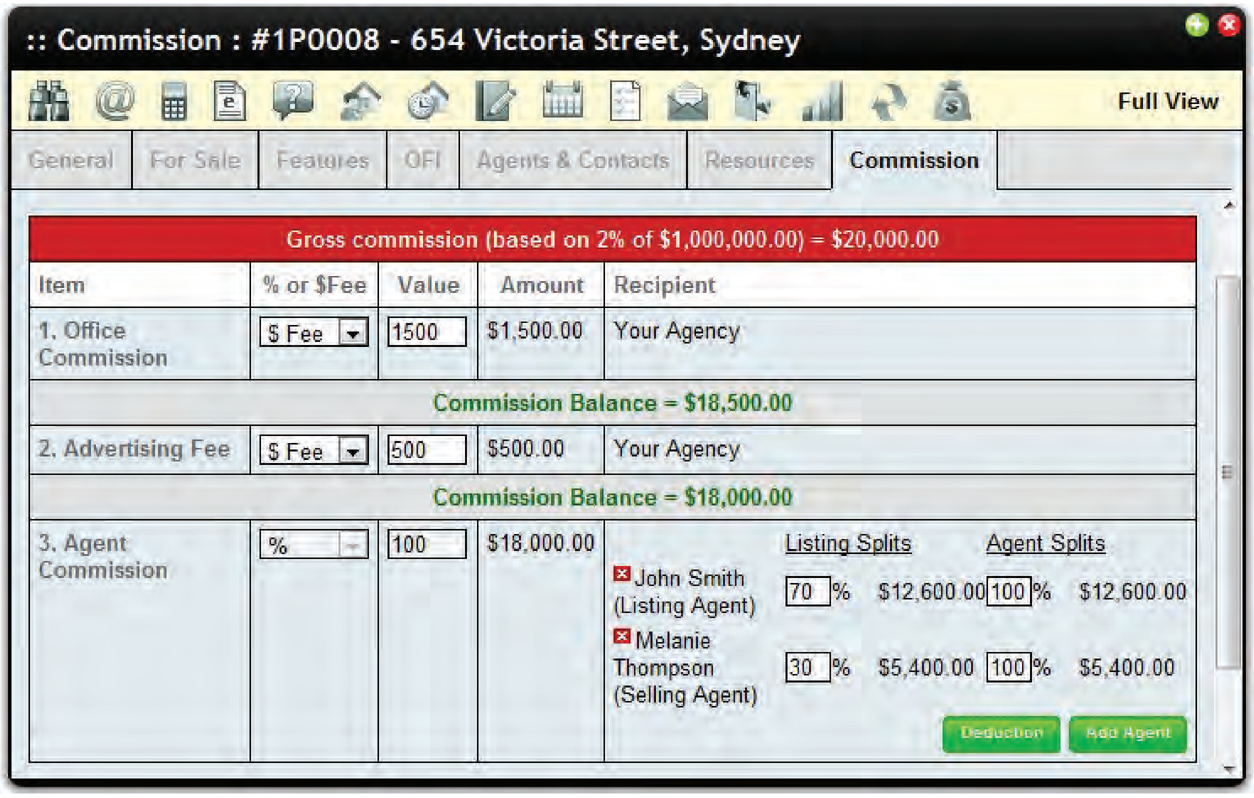
7. Re-order the fees by dragging and dropping into the required order. In this example we move to the following order;

- 1. Office
- 2. Advertising Fee
- 3. Agent Commission

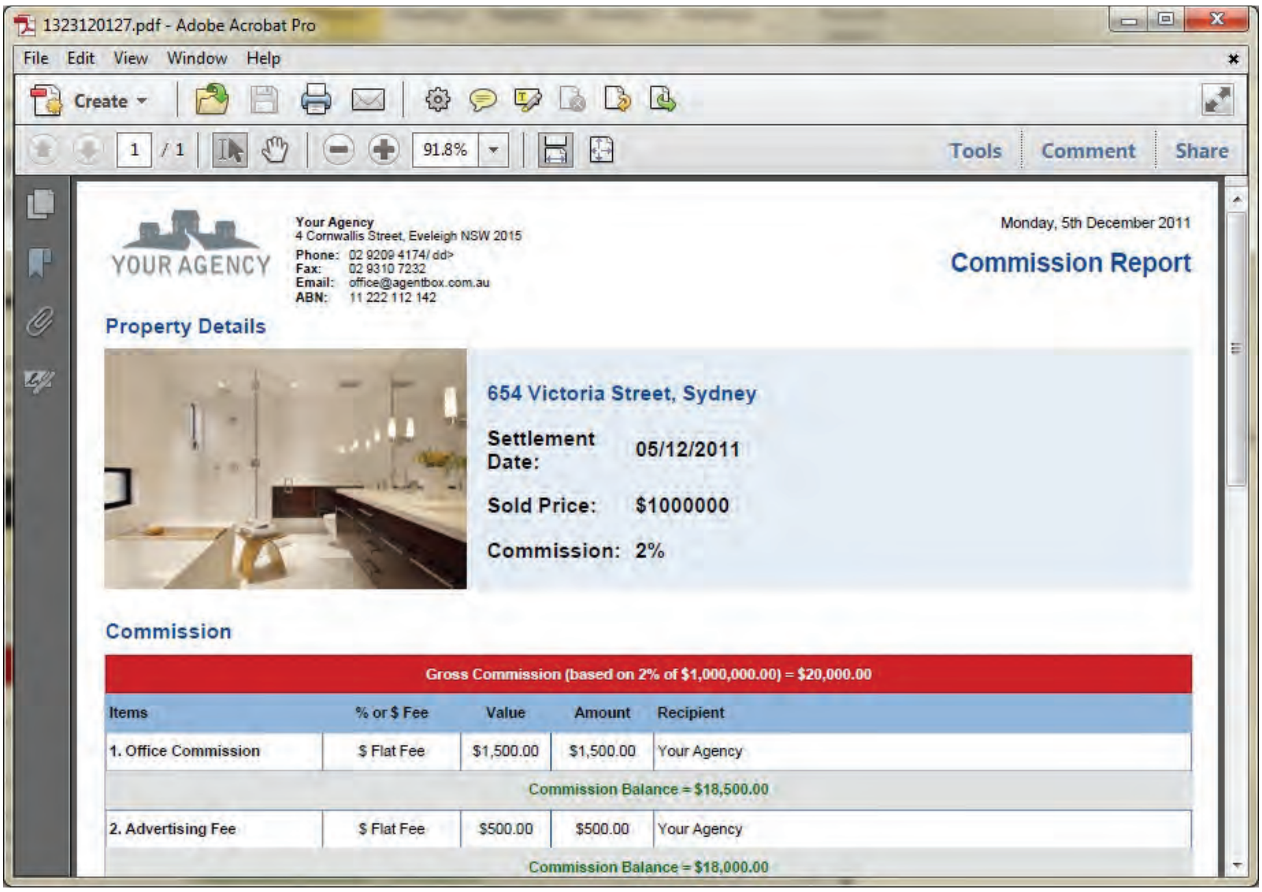


8. Click Save and Proceed to enter the Agent Commission.

- 1. Office Commission – Select **$ Fee** from the drop down, then enter the amount the office receives. In this example $1500.00
- 2. Advertising Fee – Select **$ Fee** from the drop down, then enter the amount the office receives. In this example $500.00
- 3. Agent Commission – By default will be 100% of the balance. Add in the Listing Agent and the Selling Agent by clicking the green Add Agent button. Then enter the percentage each agent receives for their part of the sale in the listing splits column. In this example 70% for listing and 30% for selling.



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



Contacts

Contacts

In 'Contacts' you can add/edit your contacts, run advanced searches to send bulk communications e.g weekly e-newsletters etc

How do I add a Contact?
How do I add a Company/Business?
How do I add a Supplier?
How do I add a related property to a contact?
How do I add a related contact?
How do I setup a letter head for a contact?
How do I subscribe contacts to e-newsletters?
How do I add buyer/tenant requirements to a contact?
How do I search for a contact?
How do I search for a group of contacts?
How do I print a detailed contact report?
How do I view properties a contact has inspected?
How do I send an email to a contact?
How do I SMS a contact?
How do I send an e-newsletter to a contact?
How do I log a contact enquiry?
How do I log inspection feedback by appointment?
How do I match properties to a contact?
How do I add a meeting to a contact?
How do I add a note to a contact?
How do I add a task to a contact?
How do I apply an activity schedule to a contact?
How do I send a letter to a contact?

The Contact Card

The Contact Card Tabs

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

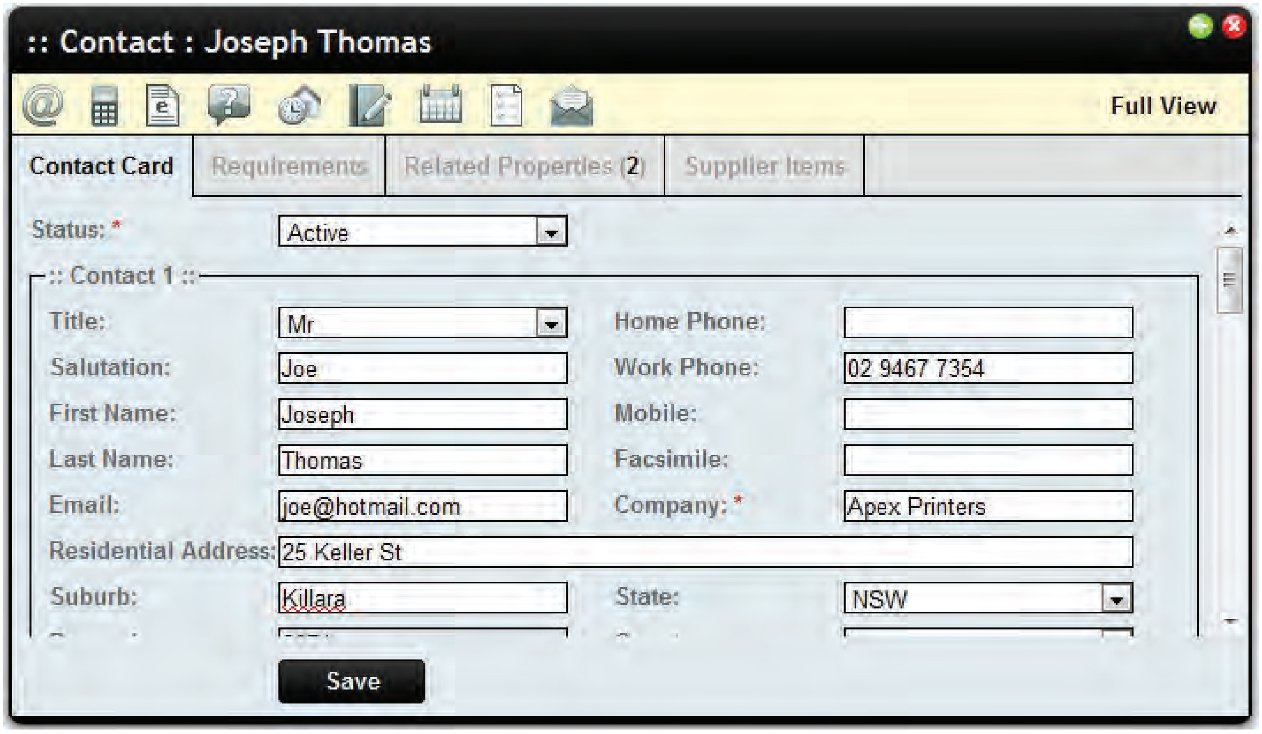
- Main Contact Panel & Tabs
- Property Action Icons
- Left Panel Tabs

Contact Panel Tabs

Main Contact Panel & Tabs

*Note: Only the Contact Card and Requirements tab will show by default. The Related Properties tab will become available once you have linked one or more properties to the contact and the Supplier Items tab will only be available if they are ticked as a supplier in the Contact Class section of the Contact Card panel.

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



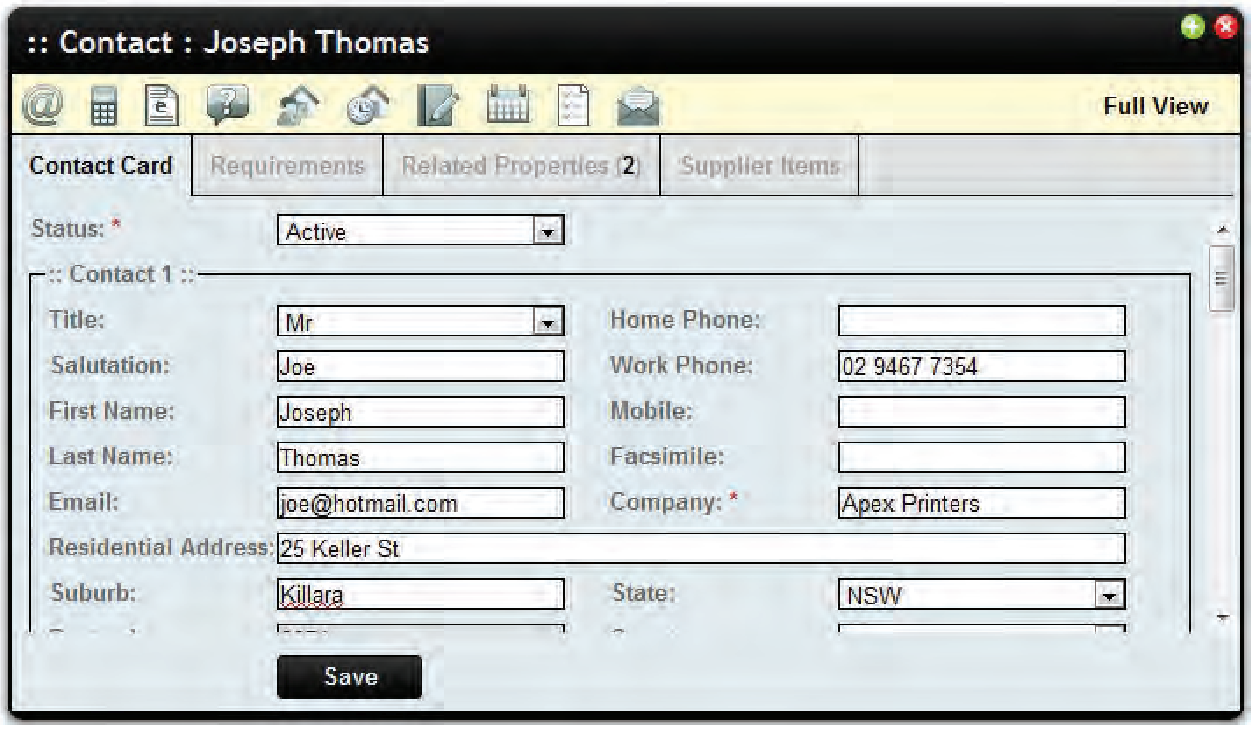
Contact Action Icons

Contact Action Icons

From Left to Right

- Email - *Send an email directly to the contact and view previously sent emails*
- SMS - *Send an SMS directly to the contact (SMS credits to be purchased in advance, contact support on 02 9209 4174 or support@agentbox.com.au)*

- E-Newsletter - *Send an e-newsletter directly to the contact*
- Log Enquiry - *Log an enquiry made on a property by the contact*
- Match Properties - *Match available properties suitable for the contact. Only appears if requirements have been entered.*
- Log Feedback by Appointment - *Log feedback on a property the contact has inspected by appointment.*
- Add a Note - *Add notes against the contact and view previous notes.*
- Add a Meeting - *Schedule a meeting with this contact.*
- Tasks & Activity Schedules - *Apply a single task, activity schedule or view active and completed tasks against the contact.*
- Send a Letter - *Send a letter directly to the contact, edit/create a letter template and access previously sent letters.*

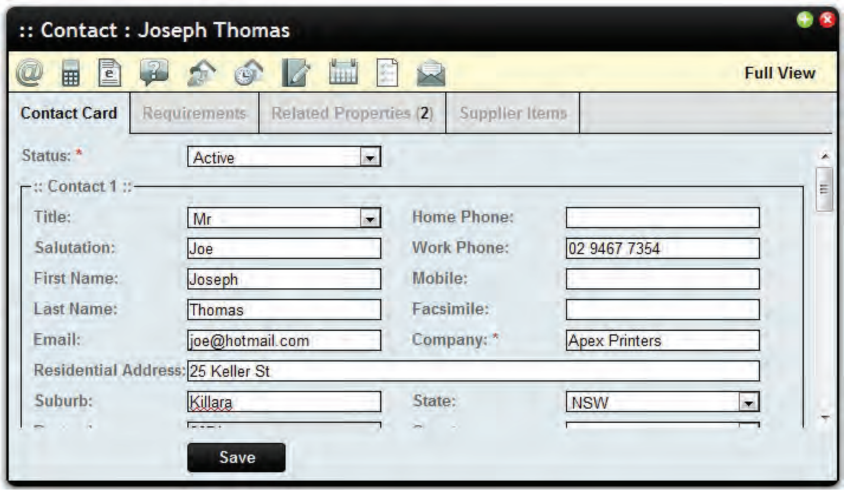


Left Panel Tabs

Left Contact Panel Tabs

If you are unable to view the left panel, please click Full View in the top right hand corner of the main contact panel.

- [Notes History](#) - This section will display all saved notes relating to the contact
- [Communication History](#) - This section combines sent emails, SMS, e-newsletters and logged enquiries to create an extensive history of all communication the office has had with the contact.
- [Activity Schedules](#) - This section allows you to view the activity schedules applied to the contact and the tasks involved in each.
- [Viewed Inspections](#) - This section lists all inspections the contact has and allows you to edit feedback made.
- [Contact Modifications](#) - This section allows Master Users to view all changes to the contact card with record of the date, time and which user made the change.



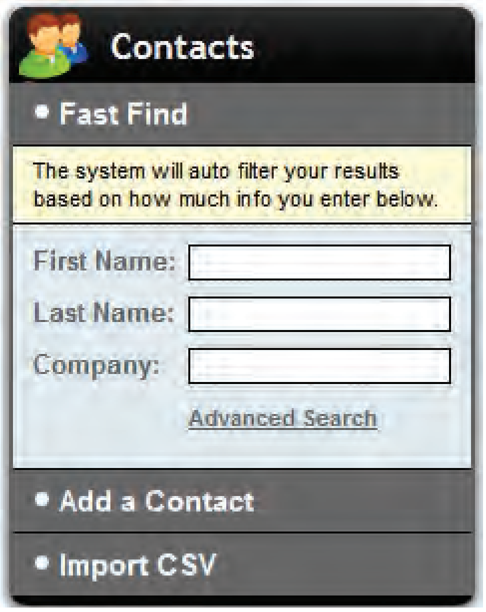
Import Contacts

How do I import a Contact CSV/spreadsheet?

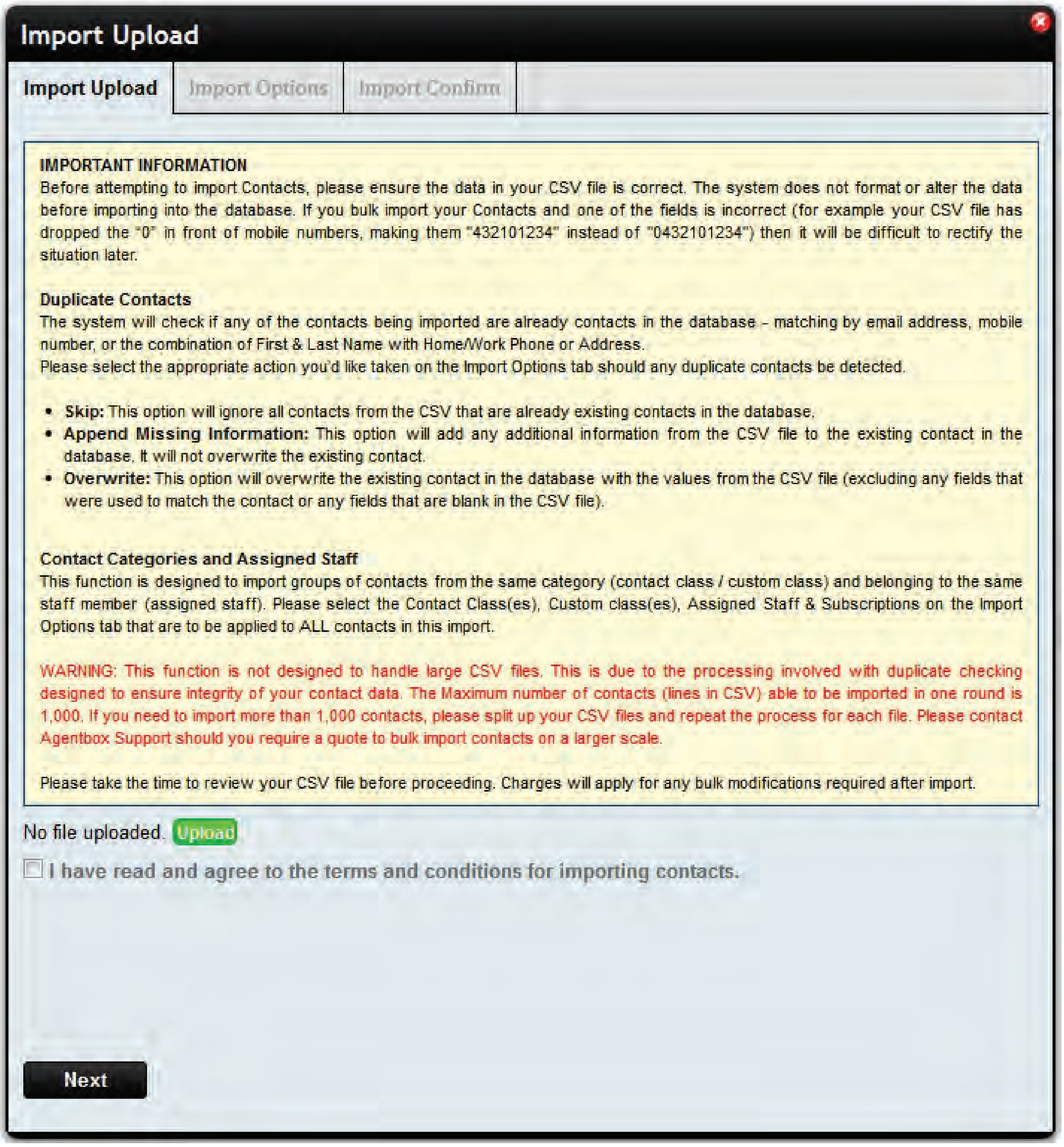
WARNING: This function is not designed to handle large CSV files. This is due to the processing involved with duplicate checking designed to ensure integrity of your contact data. The Maximum number of contacts (lines in CSV) able to be imported in one round is 1,000. If you need to import more than 1,000 contacts, please split up your CSV files and repeat the process for each file. Please contact Agentbox Support should you require a quote to bulk import contacts on a larger scale.
**Note: Only Master Users have access to this tool*

1. Click on the Contacts icon from the Main Menu

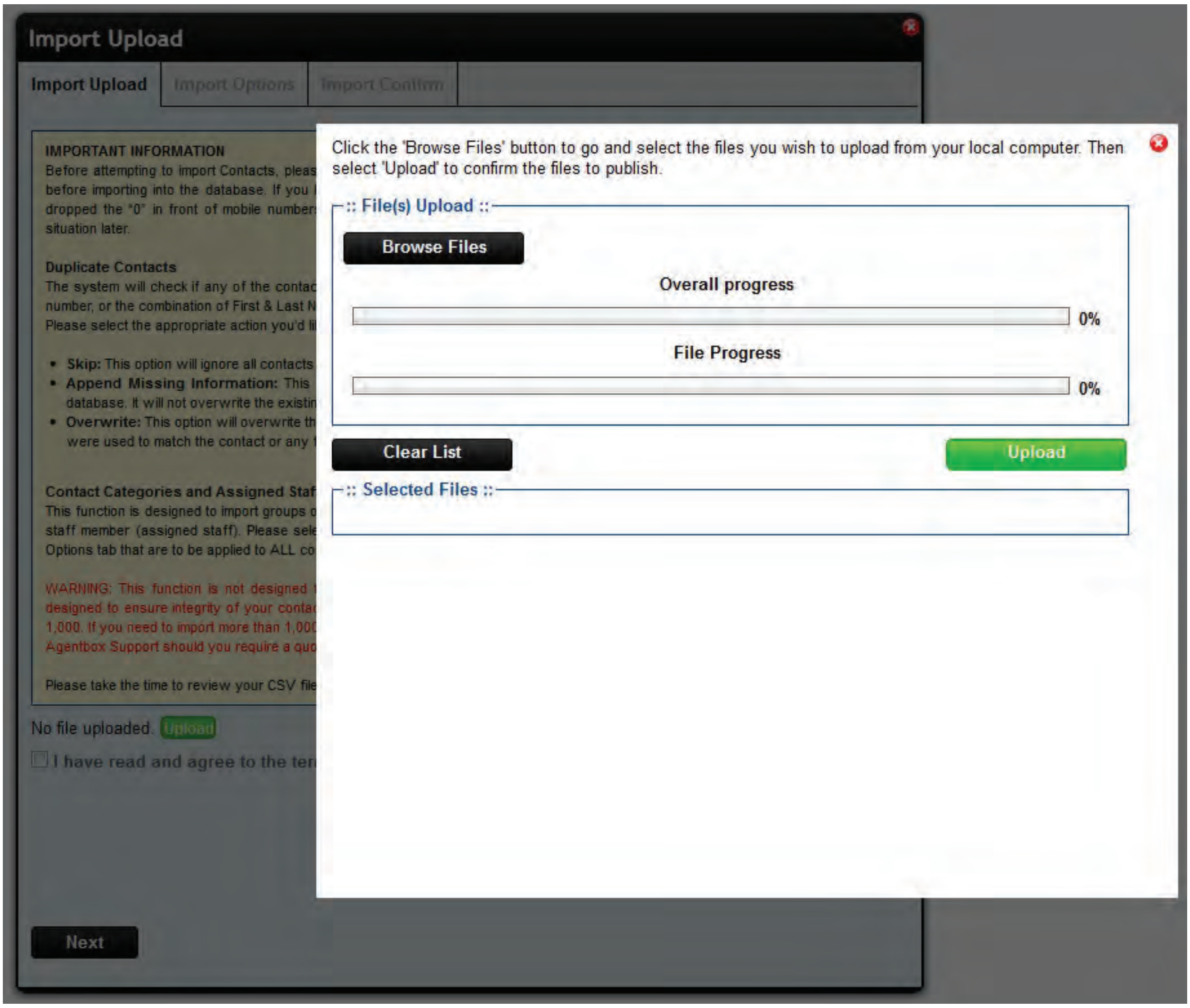
2. Click on Import CSV from the Left Contact Panel



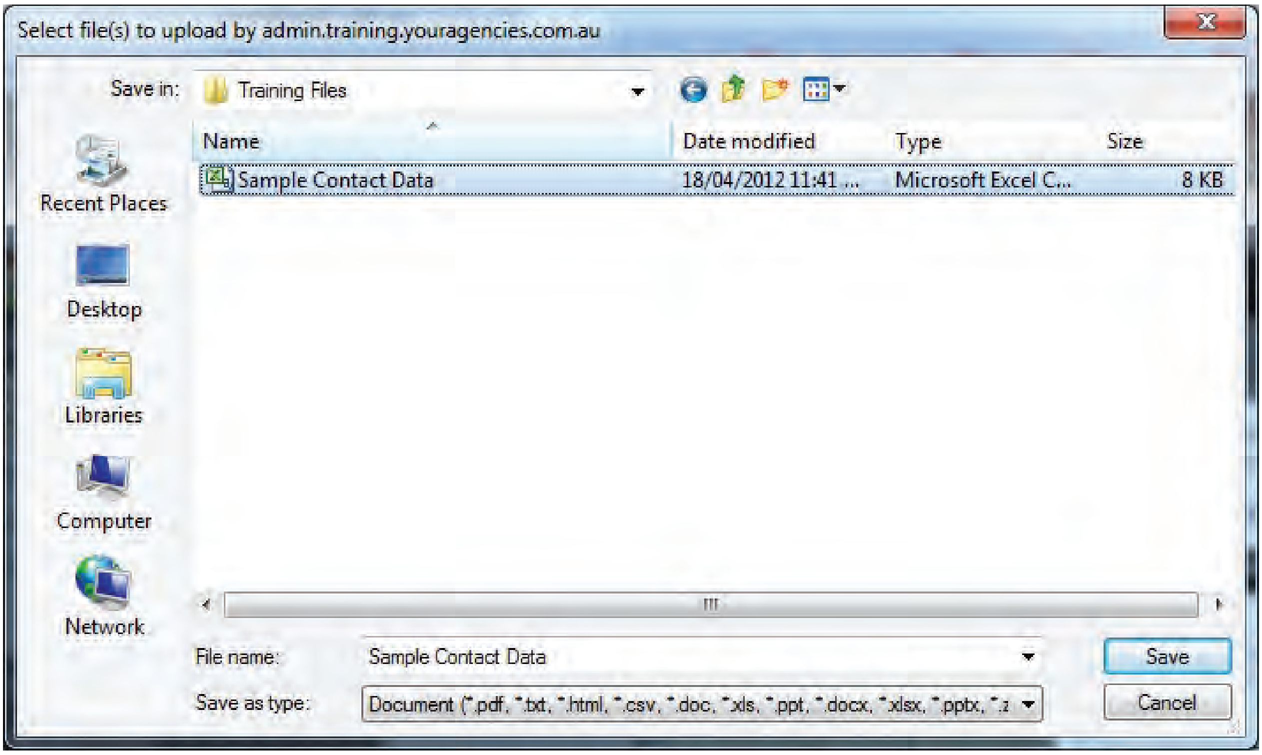
3. Click the green Upload button



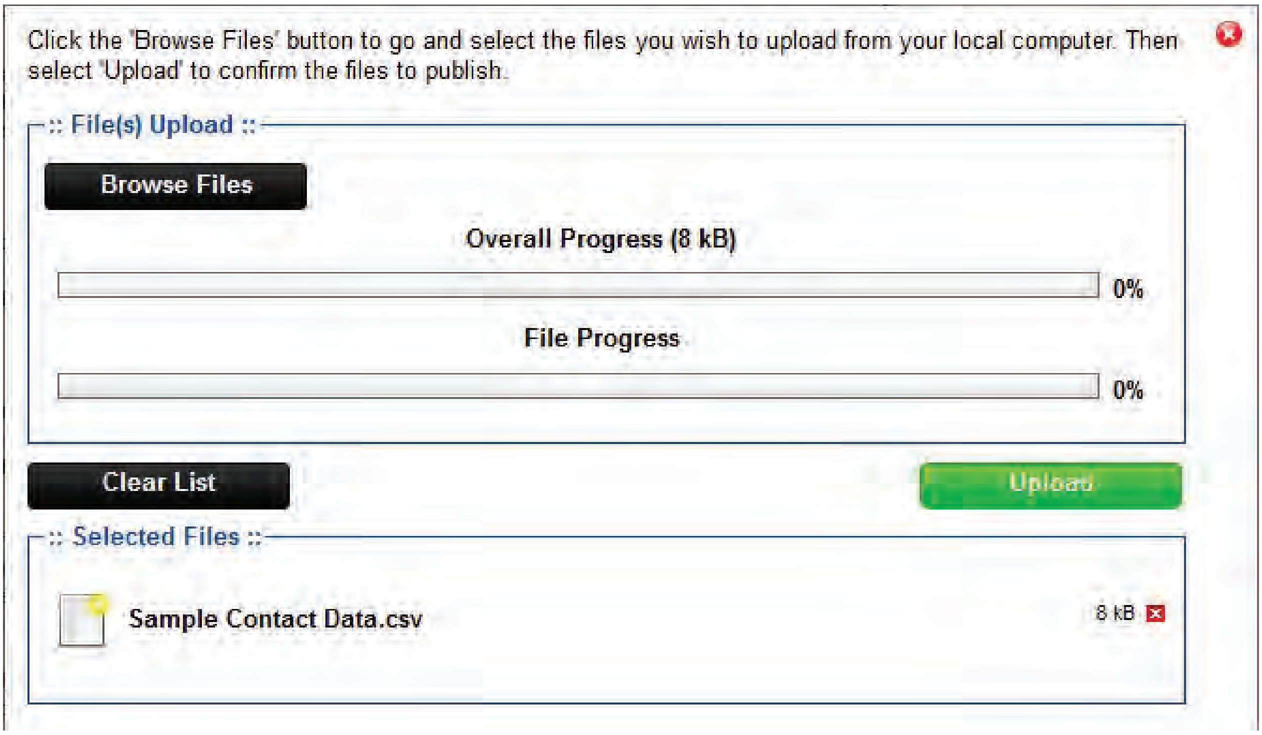
4. Click Browse Files



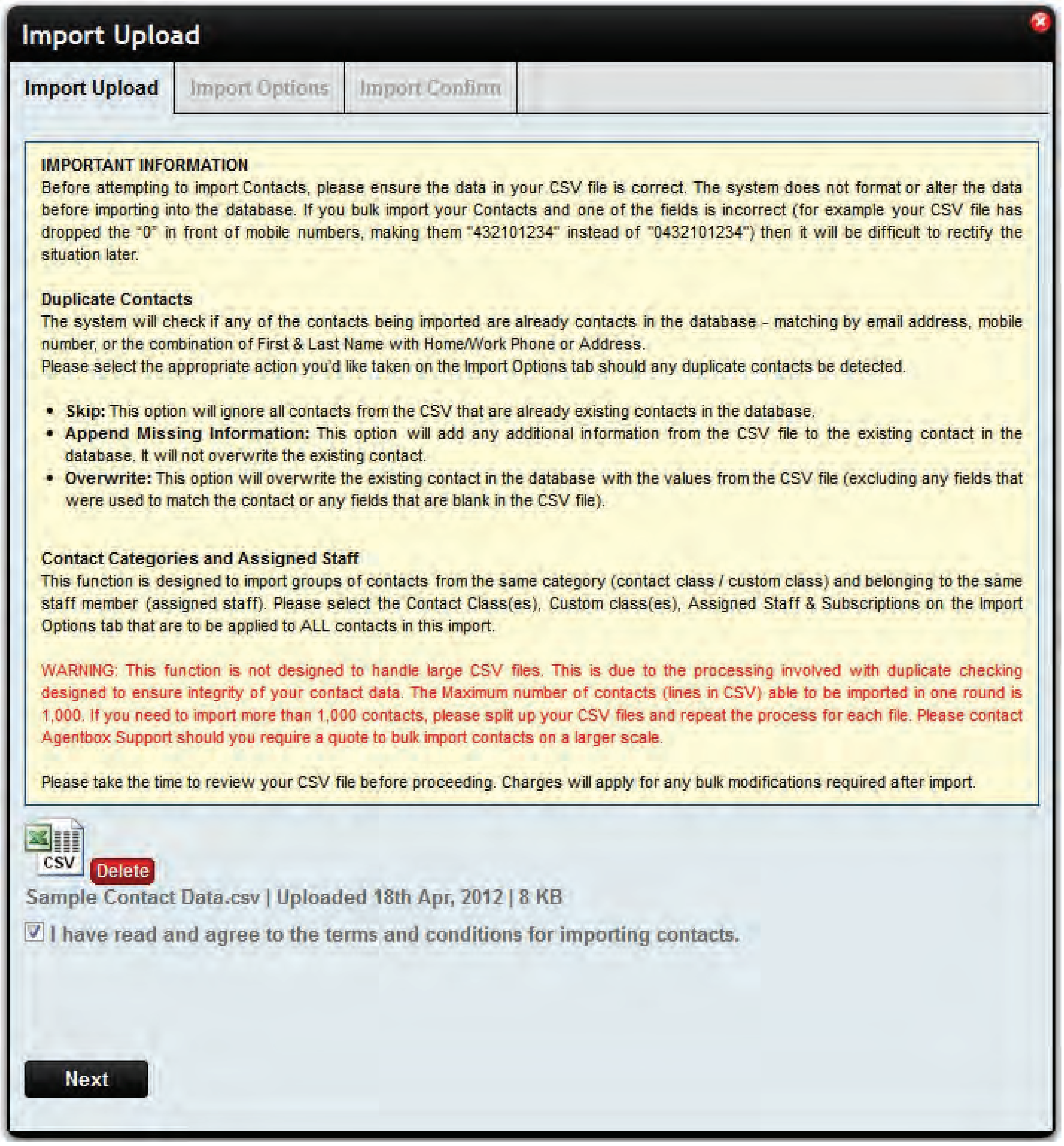
5. Locate Photo located within computer files, click on the file then select Save



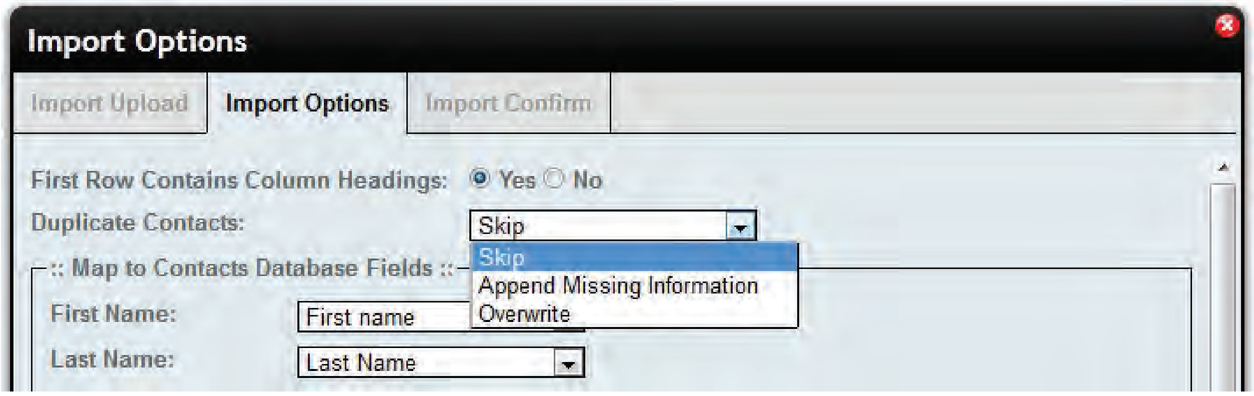
6. Click the green Upload button



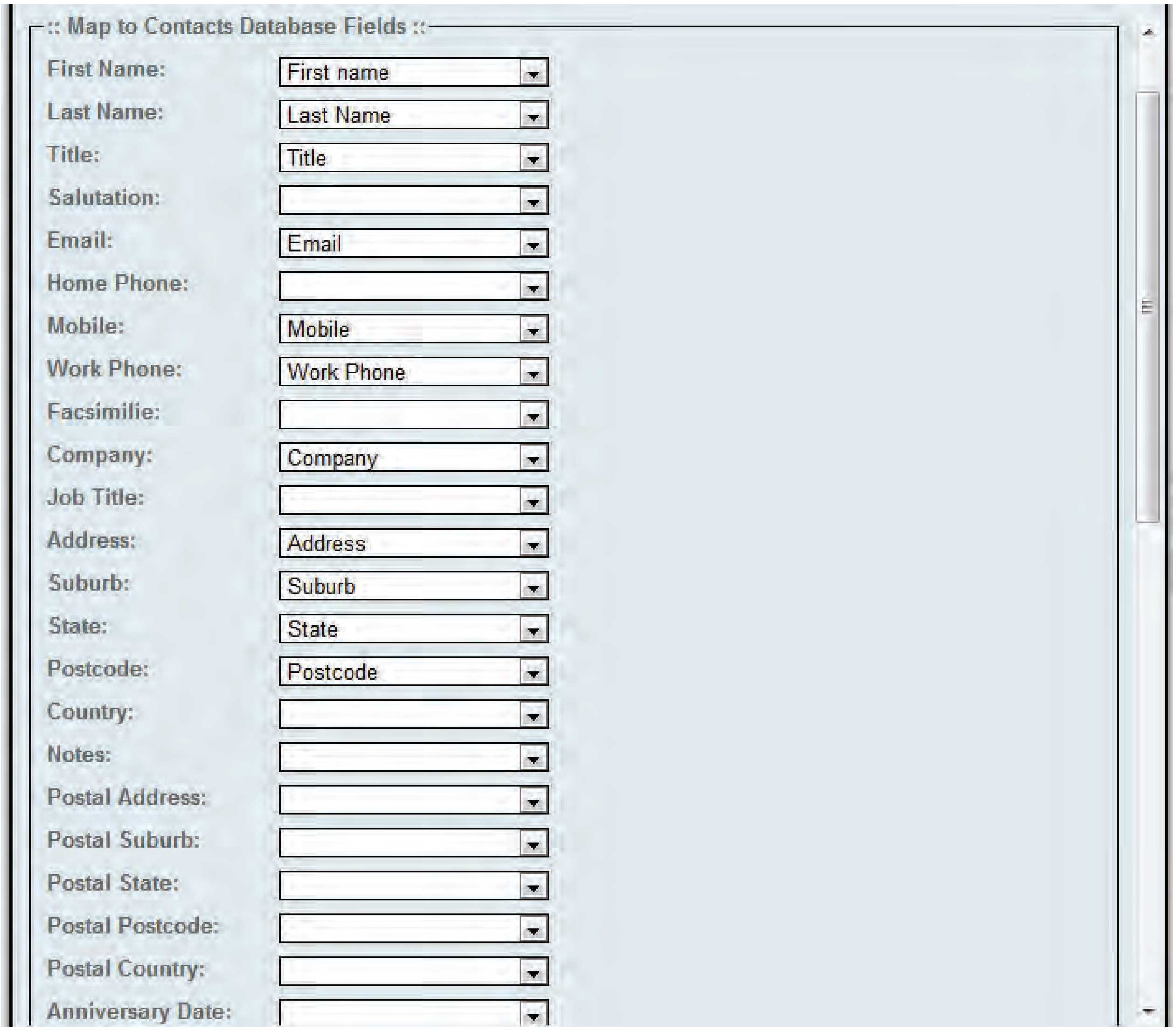
7. Once uploaded, read and tick that you have read and agree to the terms and conditions for importing contacts and click next



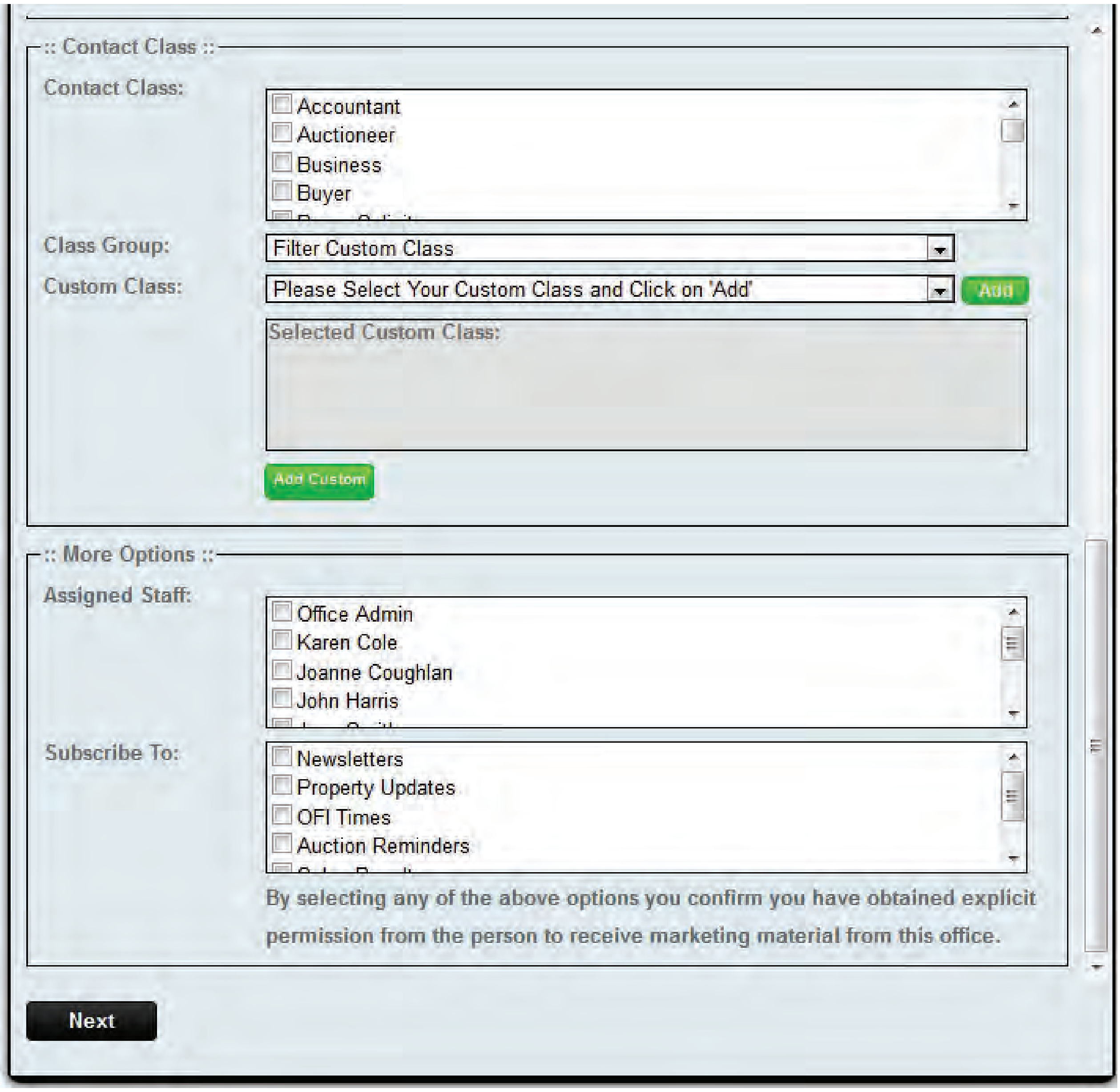
8. Select Yes if the first row of data contains headings for each column.
9. Select how you would like the system to respond to duplicate contacts, in this example we will append missing information.
   - Skip (completely ignore the contact)
   - Append Missing Information (update the existing contact with the additional data entered)
   - Overwrite (completely overwrite the existing record with the data in the file)



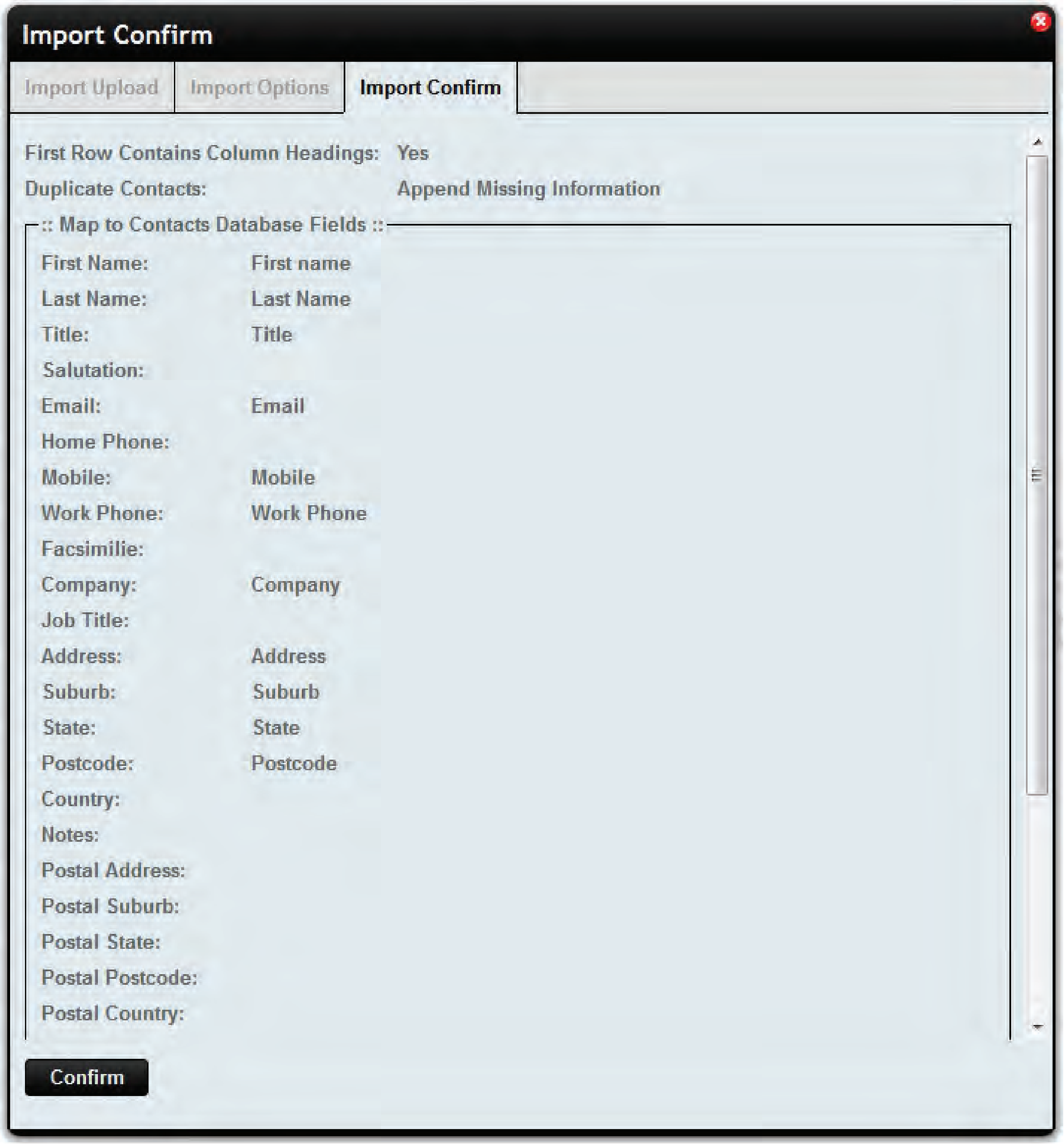
10. Map the system fields with the fields in the spread sheet



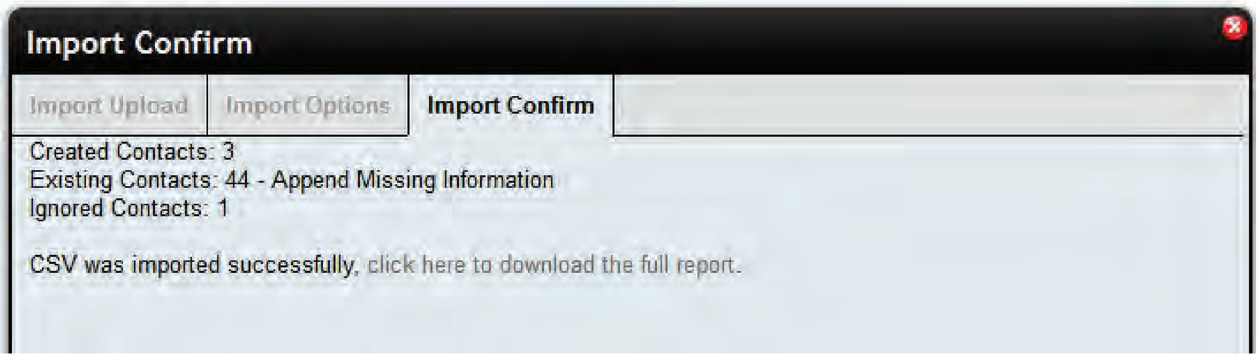
11. Select the contact classes, custom classes, assigned staff and bulk subscribe the contacts and click next.



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



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

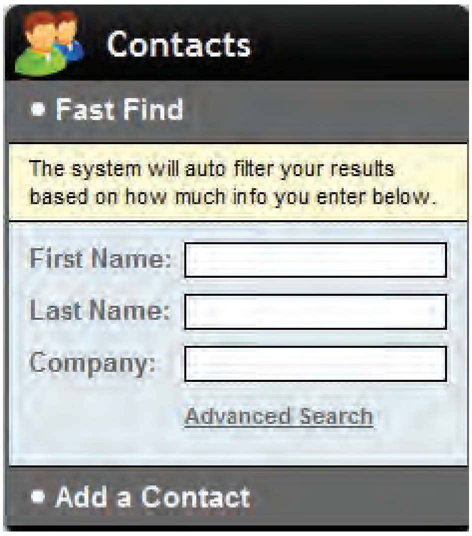


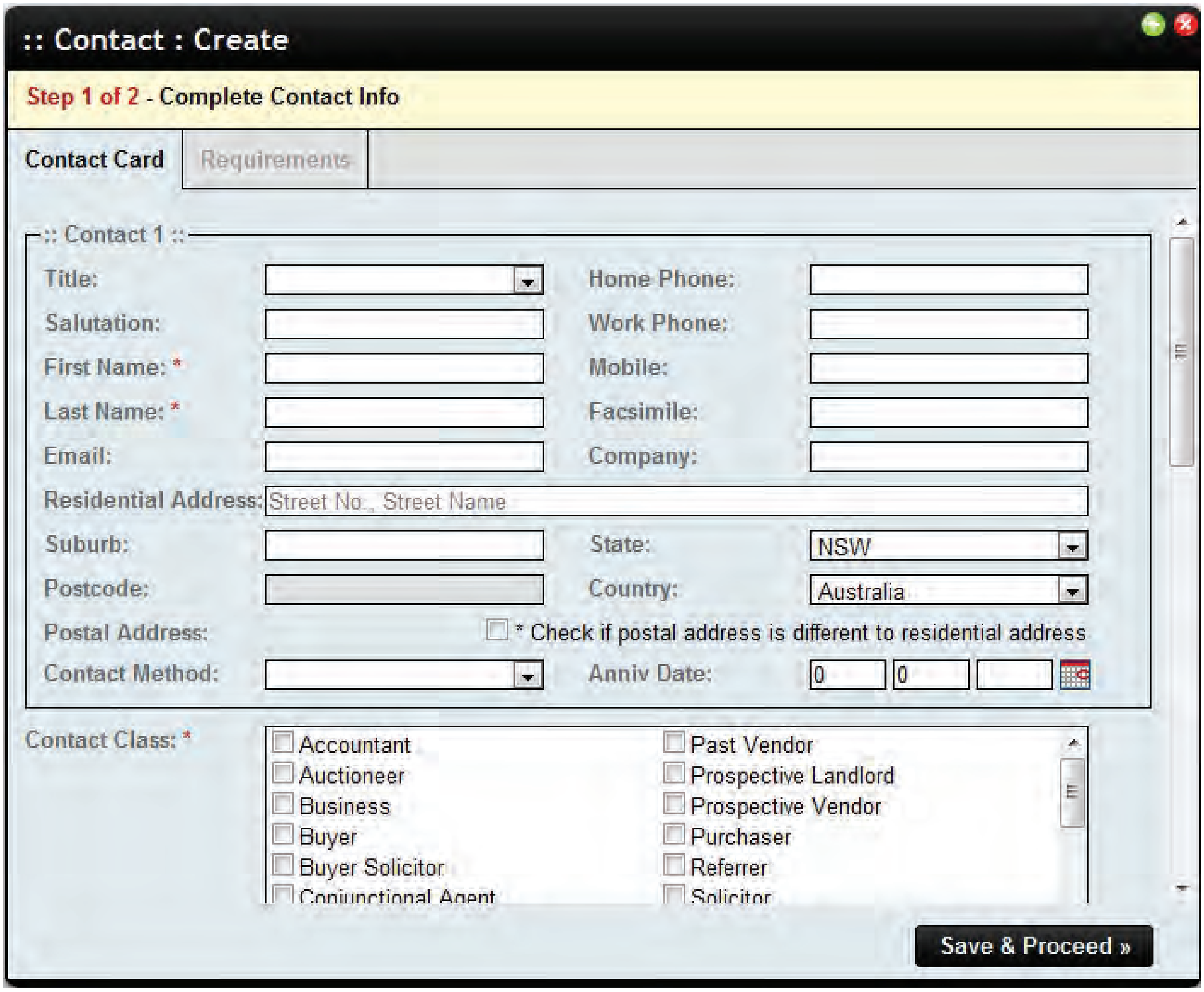
Add Contact

How do I add a Contact?

1. Click on the Contacts icon from the Main Menu

2. Click on Add a Contact from the Left Contact Panel





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.*

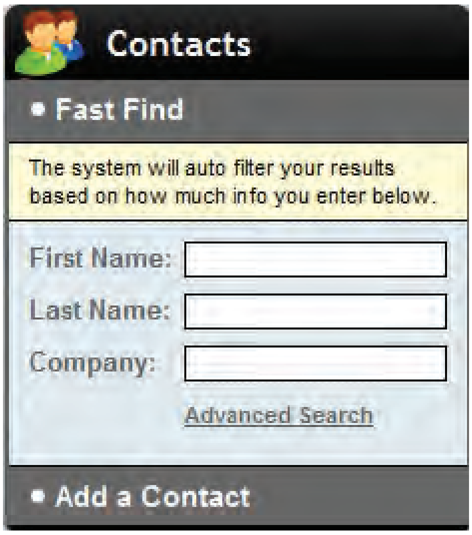
4. Click Save & Proceed.
**Note: If the contact you have added is classified as a Buyer or Tenant, once clicking Save & Proceed you will be taken to the Requirements tab of the Contact Card to enter Buyer/Tenant Requirements*.

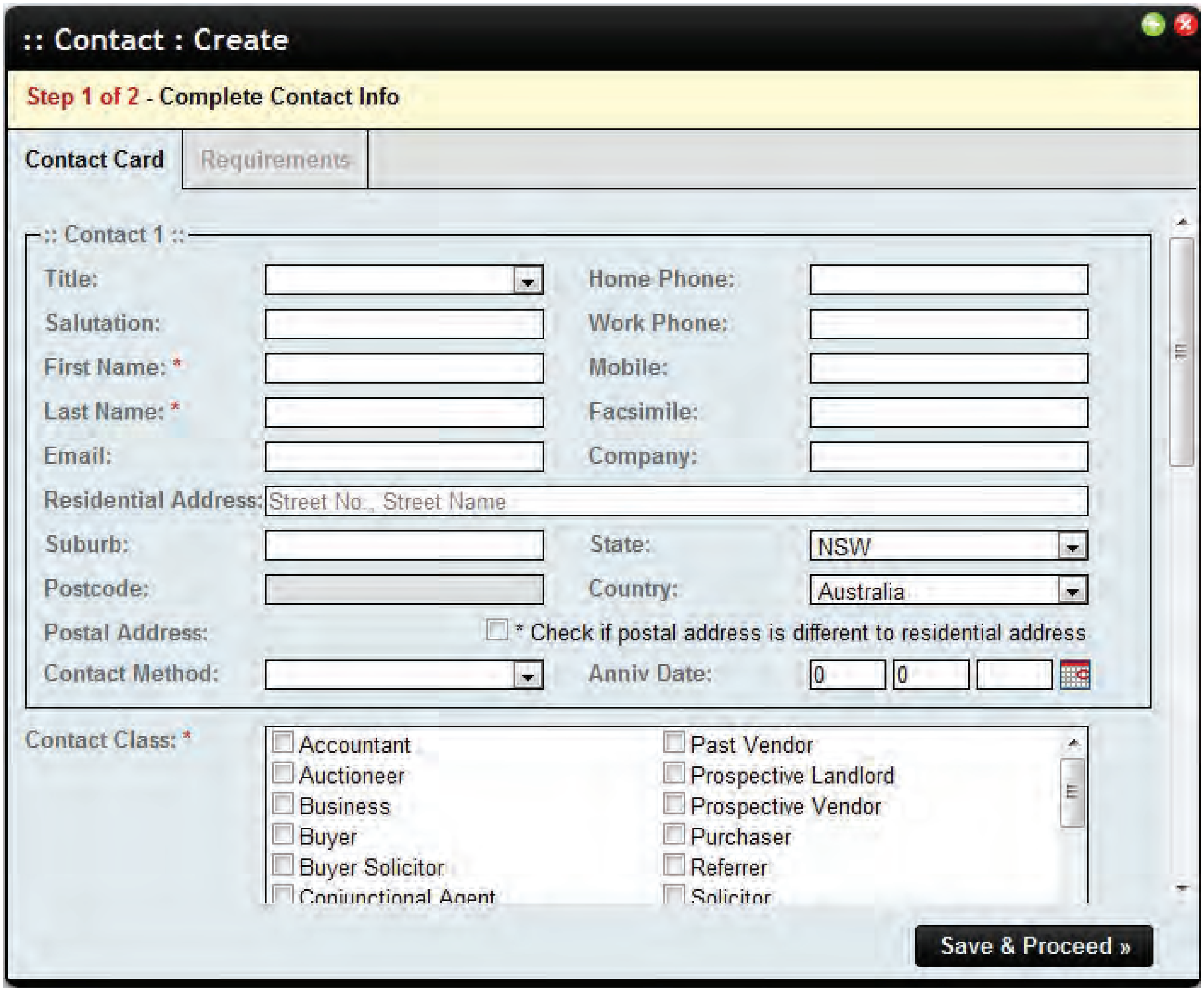
Add Business

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





3. Complete the Contact Info using the following guidelines.

* Title
* Salutation (This will be used to address the contact in E-Newsletters, if nothing is entered the First Name is used)
* First Name & Surname (These fields are compulsory unless the contact class 'Business' is ticked)
* Phone numbers
* Email (Agentbox automatically checks a valid email address has been entered)
* **Company** (This field is compulsory if the contact class 'Business' is ticked)
* Residential Address
* Postal Address (check box to enter in a postal address)
* Contact Method:
* Anniversary Date
* Contact Class: (Select at least **'Business'** and any other relevant classes e.g. supplier, solicitor etc)
* Class Group:

  A Class Group is a folder which groups Custom Classes together. To add a Class Group click on the green Add Custom button.
* Custom Class
* Contact Source: Auto Email, Email Enquiry, Import, Open Homes Inspection, Other, Phone Enquiry, Website Enquiry (May vary per office)
* Assigned Staff (depending on office sharing policies, this can be used to give access)
* Contact Comments
* Subscriptions: Auction Reminders, Newsletters, OFI Times, Property Updates, Sales Results

**Note: Minimum requirements:*
- First Name & Surname are compulsory unless the contact class Business is checked and a Company name is entered.
- Agentbox requires either an email address or mobile to eliminate the possibility of duplicates. A contact can still be created with only a phone number or physical address.
- All contacts require at least one Contact Class, they can belong to multiple classes.
- At least one Assigned Agent is required on each contact.

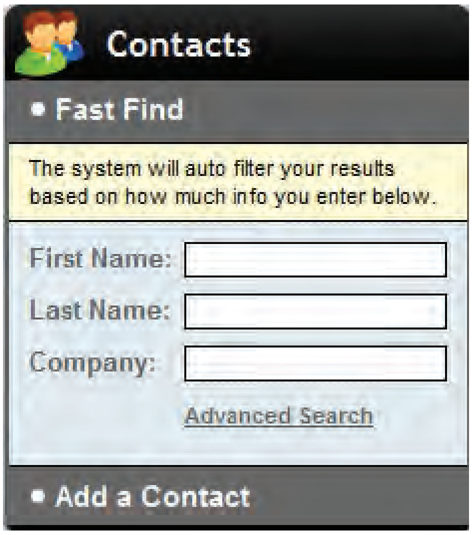
4. Click Save & Proceed.

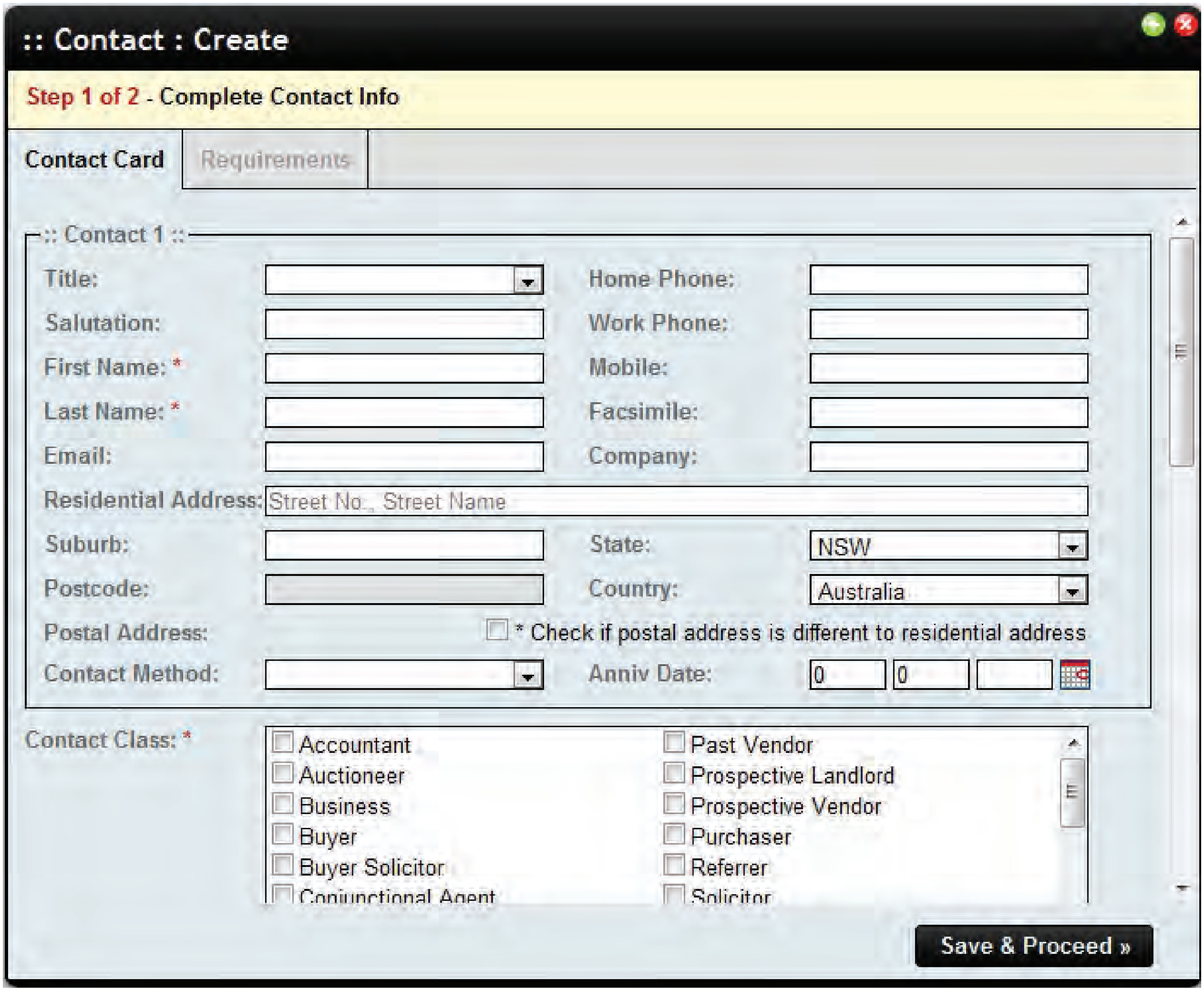
Add Supplier

How do I add a Supplier?

1. Click on the Contacts icon from the Main Menu

2. Click on Add a Contact from the Left Contact Panel





3. Complete the Contact Info using the following guidelines.

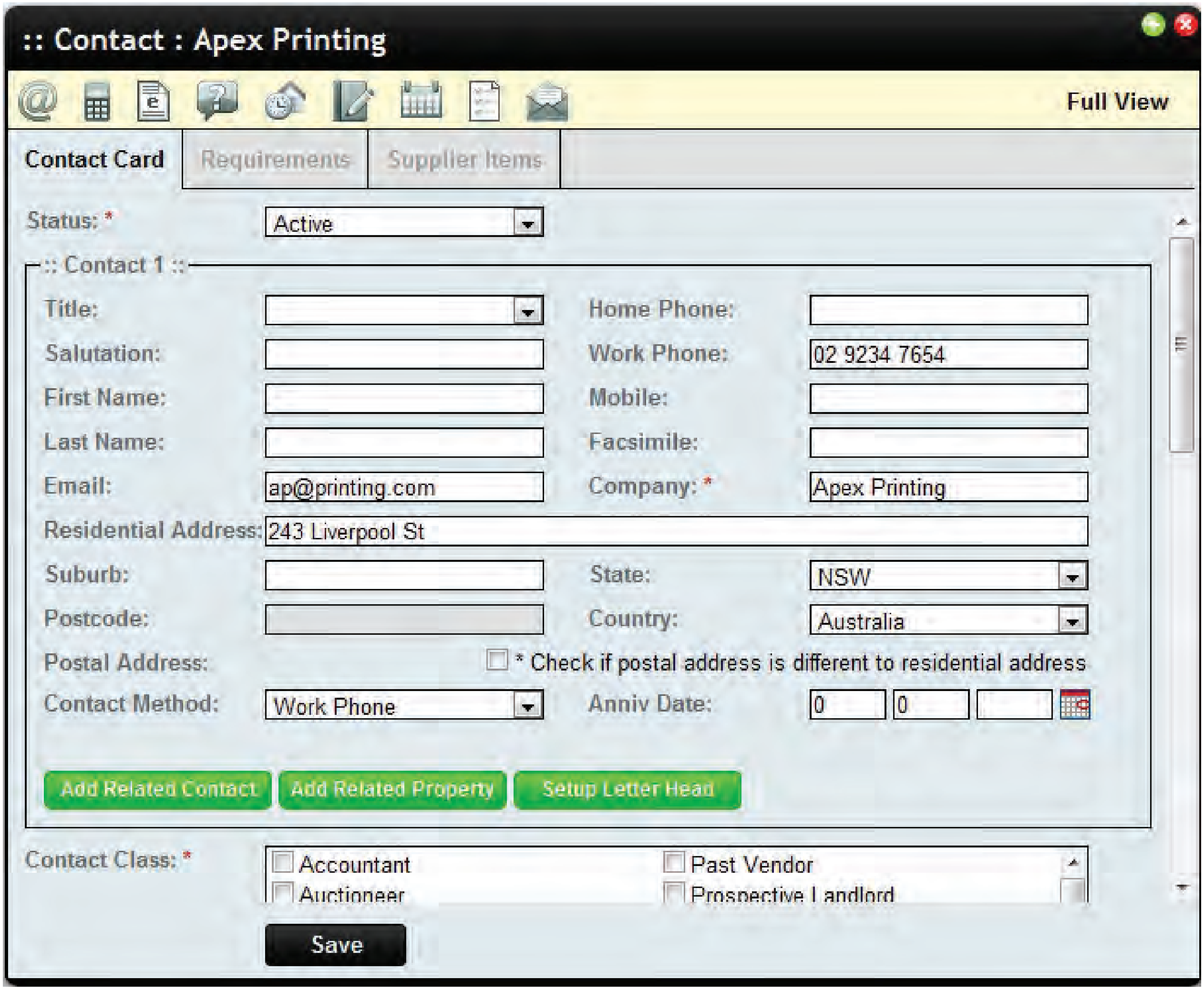
* Title
* Salutation (This will be used to address the contact in E-Newsletters, if nothing is entered the First Name is used)
* First Name & Surname (These fields are compulsory <u>unless the contact class 'Business' is ticked</u>)
* Phone numbers
* Email (Agentbox automatically checks a valid email 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 '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.



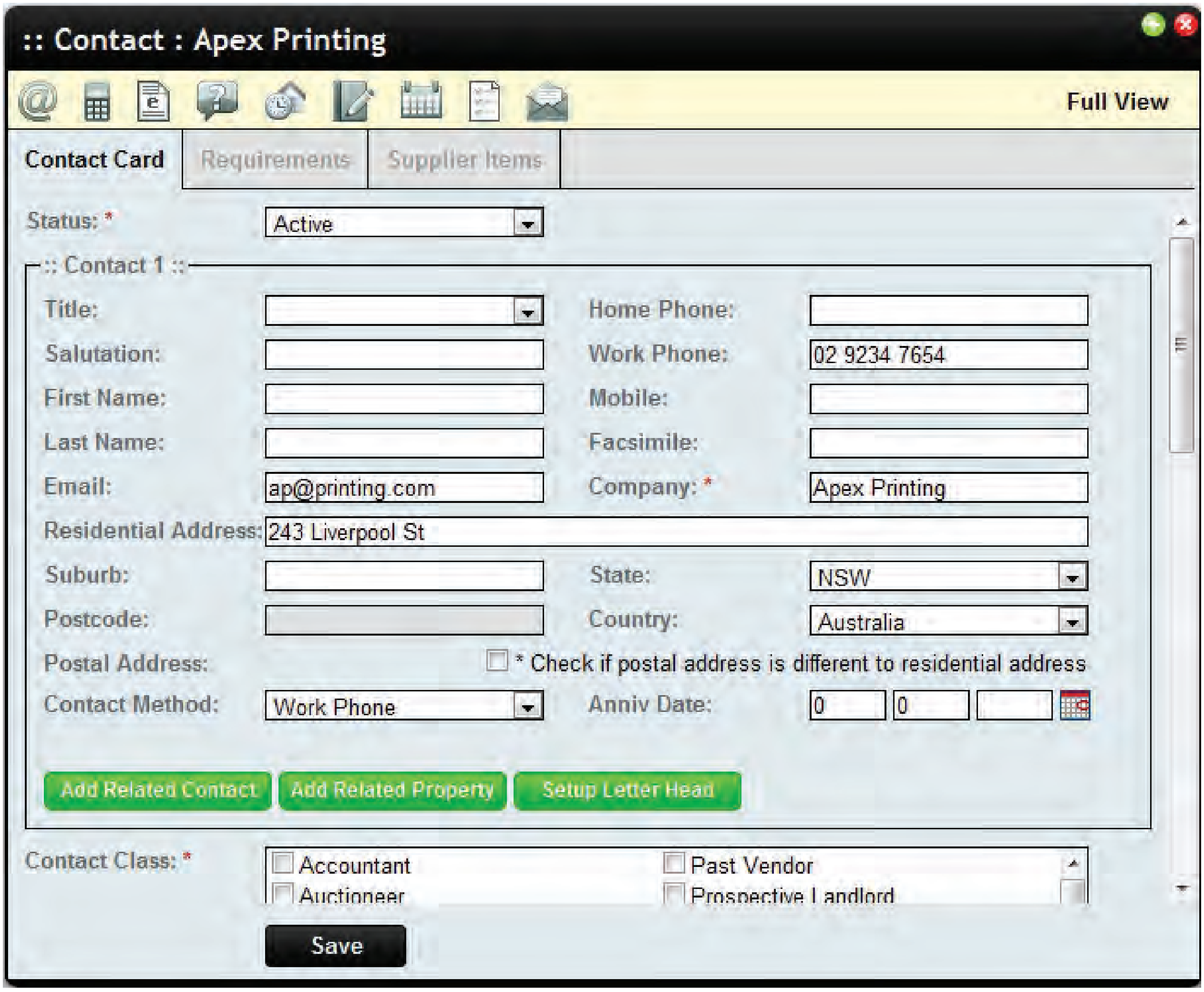
See Also...

[Supplier Items]

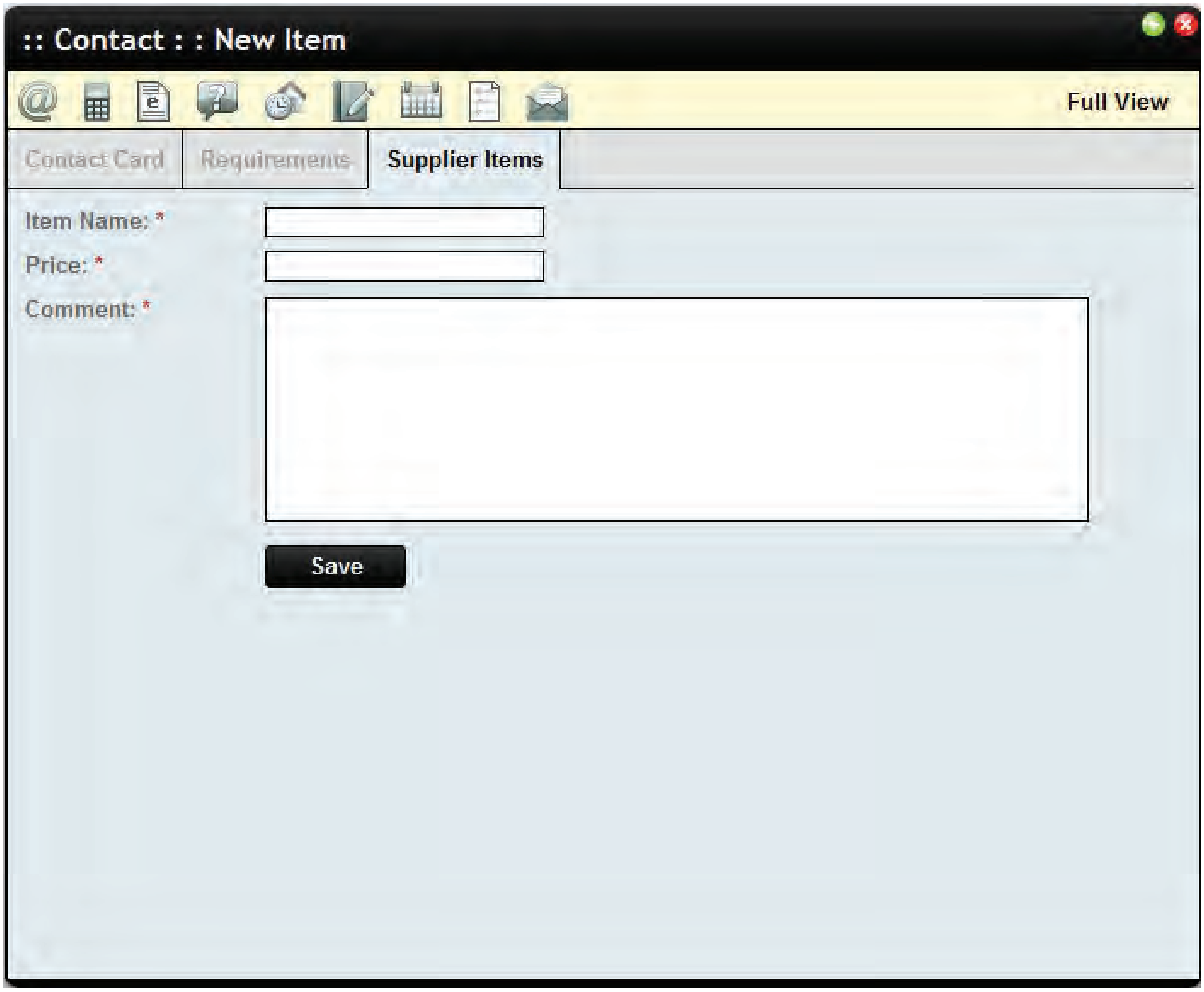
Supplier Items

How do I add Supplier Items?

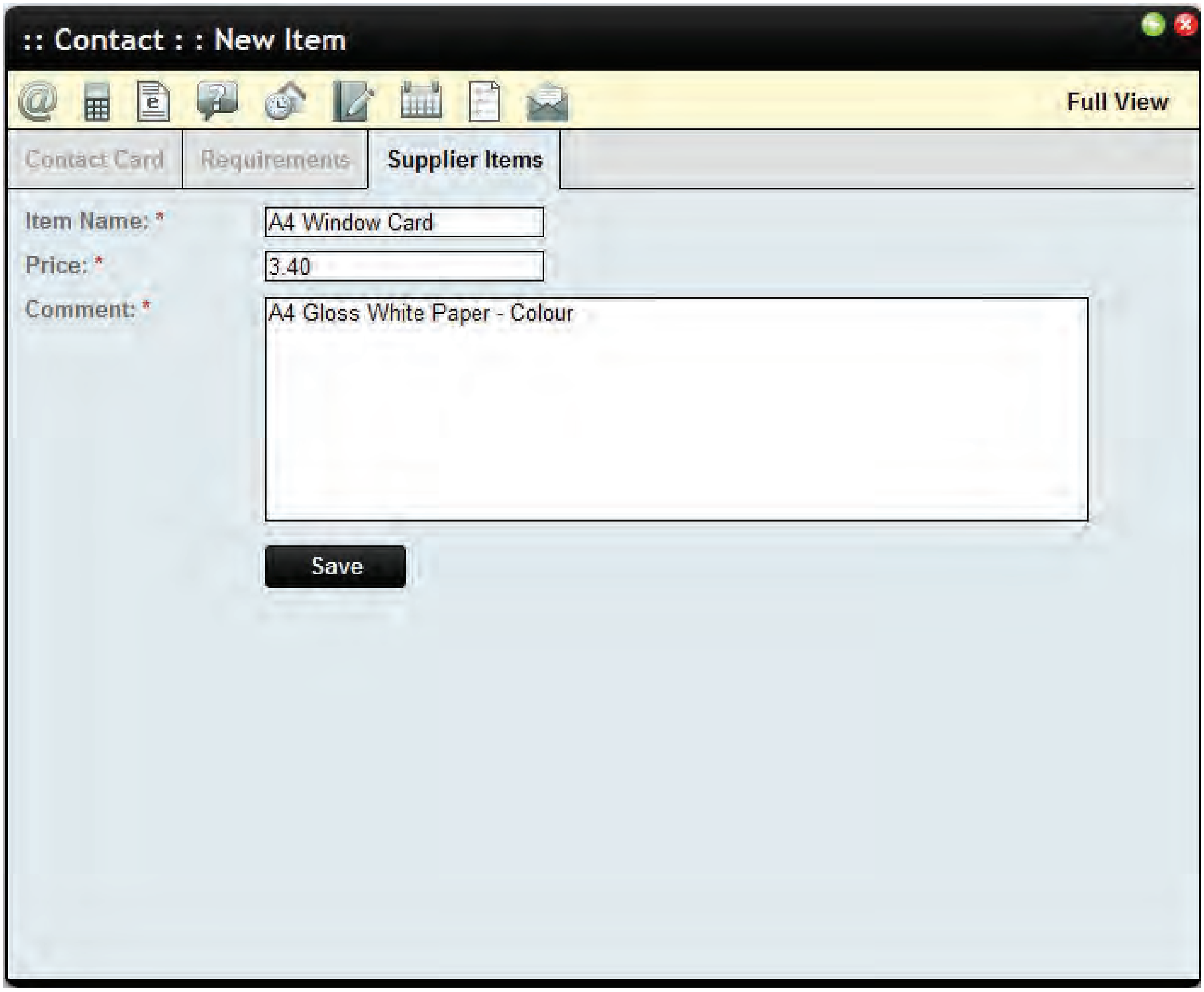
1. [Search for your Supplier Contact] and open their [Contact Card]



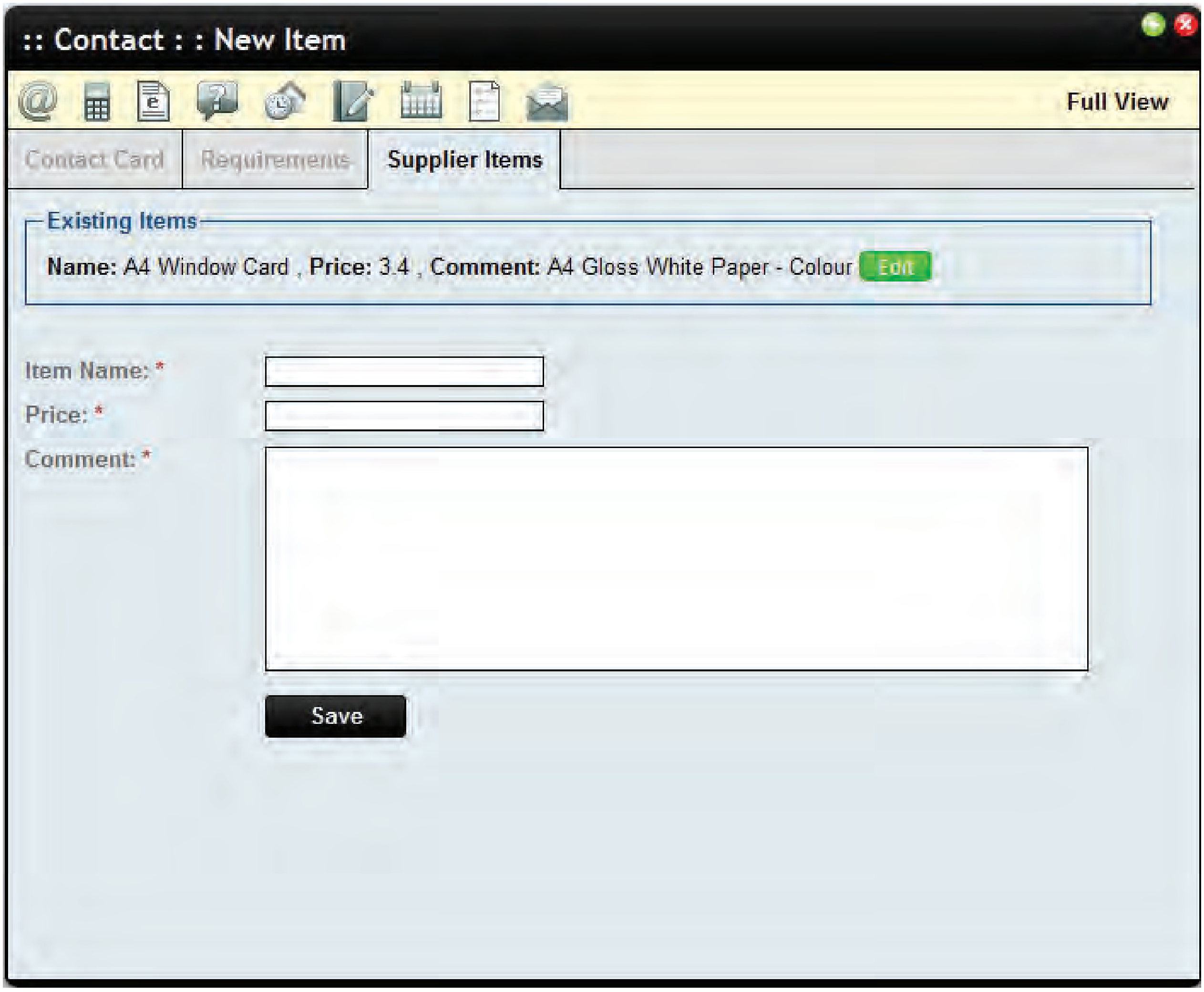
2. Click on the Supplier Items tab



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


:: Contact : : New Item
Full View
Contact Card
Requirements
Supplier Items
Item Name: *
A4 Window Card
Price: *
3.40
Comment: *
A4 Gloss White Paper - Colour
Save

4. Click Save



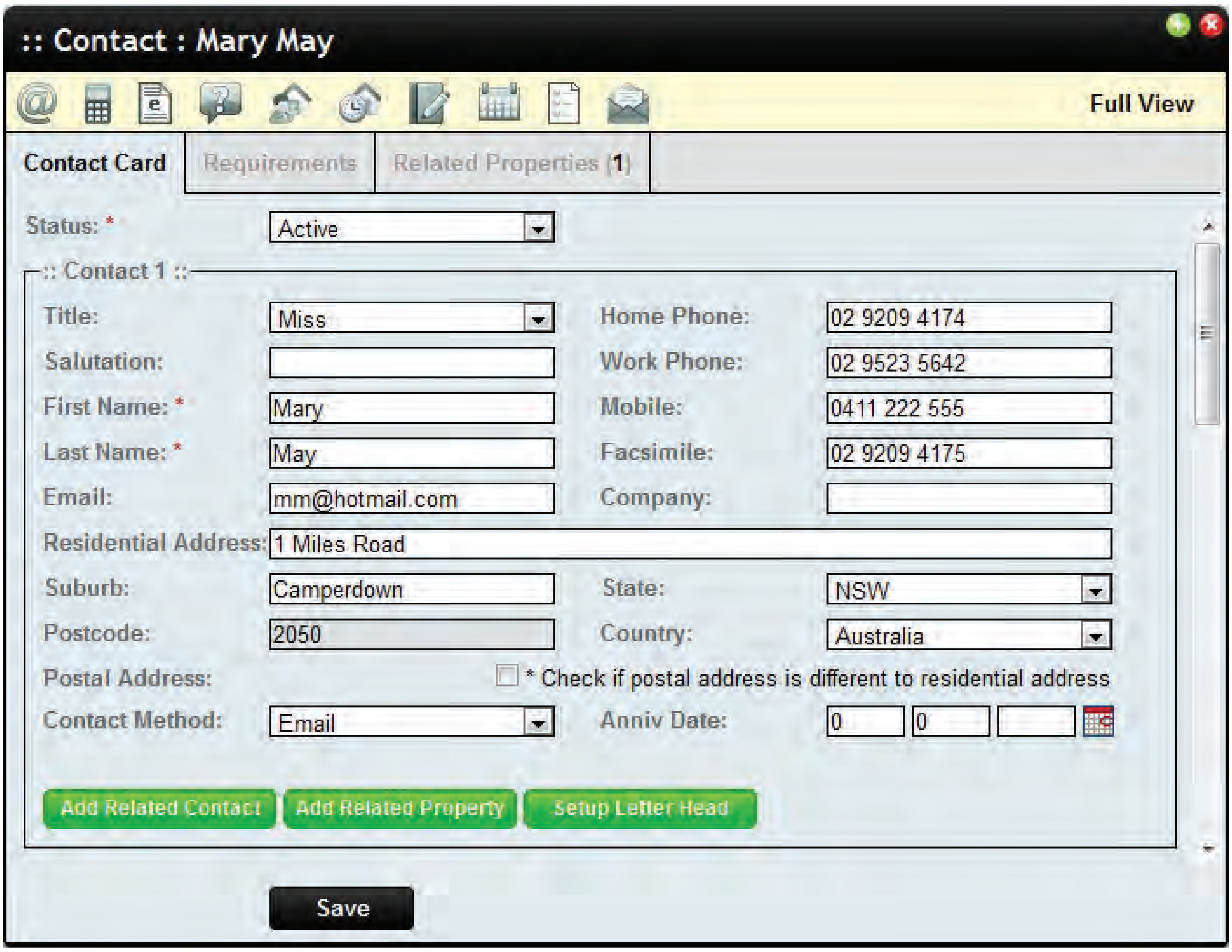
5. Follow steps 3 & 4 to add additional Supplier Items. Each Supplier Item will be added to the Existing Items list.

Add Related Contact

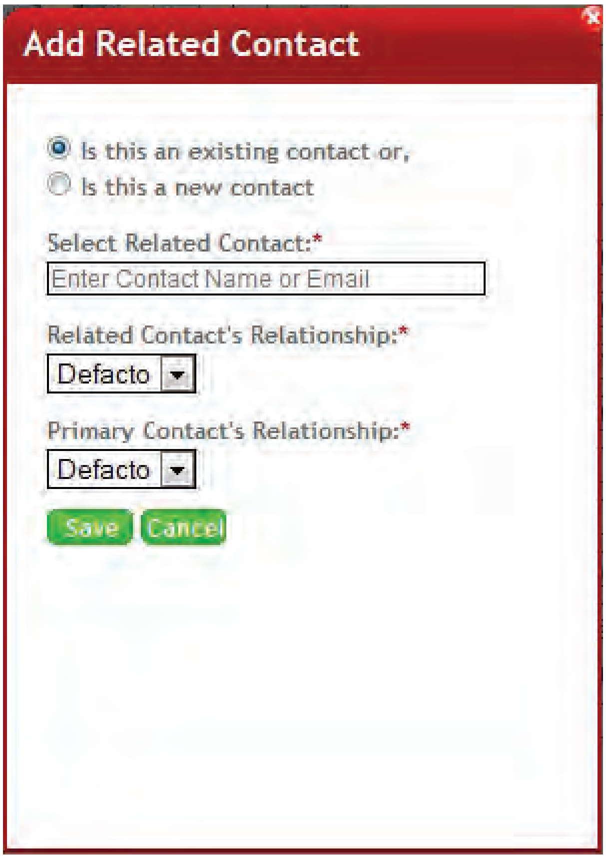
How to add a Related Contact

- If both contacts share communication/contact info e.g. you can reach either of them from a single email, mobile, phone or address then add them both in the same contact card using the primary contacts first and last name then using the salutation field to enter both contacts names
  e.g. Salutation: John & Mary
  First Name: John
  Surname: Smith
- If both contacts have different surnames or have their own unique contact info e.g. 2 mobile numbers you then create a related contact using the following steps. This is to help keep a clean database where your contacts are contactable separately e.g. in the case of a couple that has separated since your dealings with them.

1. Search for your Contact and open their Contact Card



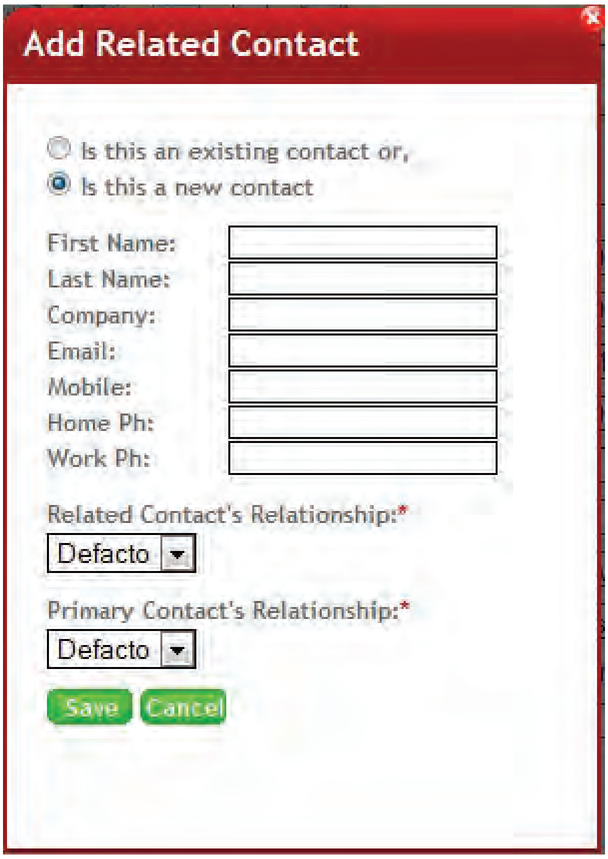
2. On the main contact card click the green Add Related Contact button



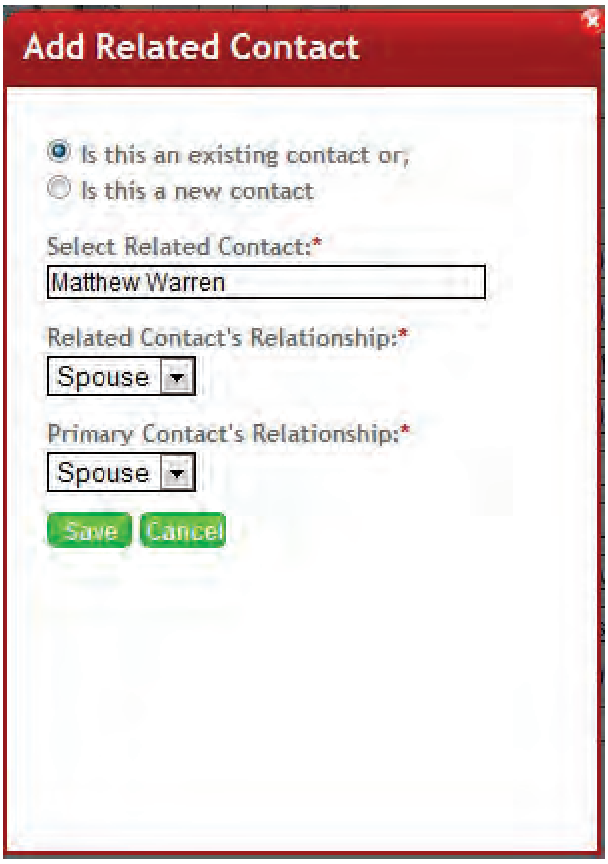
3. Select
   Is this an existing contact or,
   Is this a new contact

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:

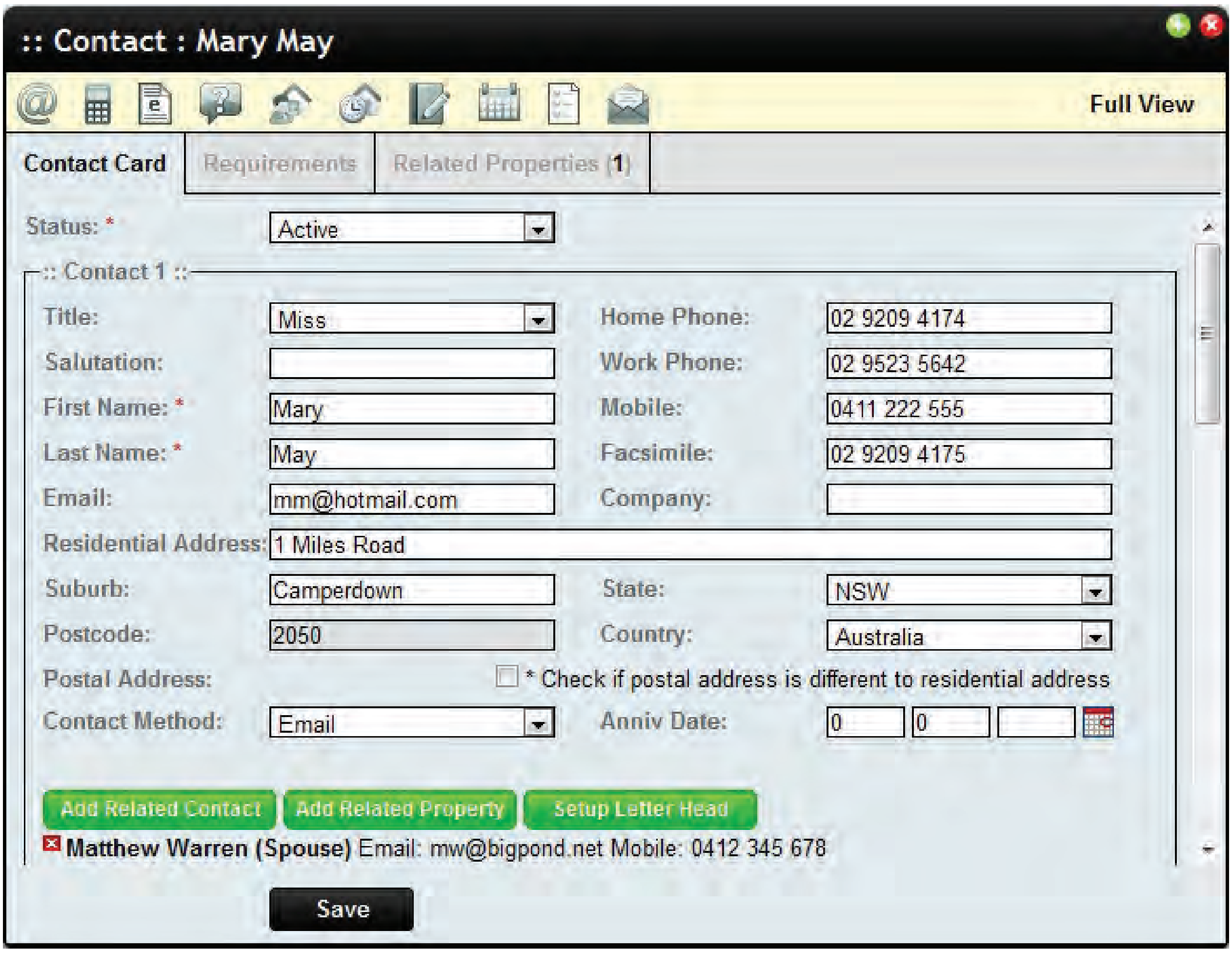


5. Select the contacts relationship to each other. Select other to enter a custom relationship
   Related Contact's Relationship:*
   Primary Contact's Relationship:*



6. Click Save

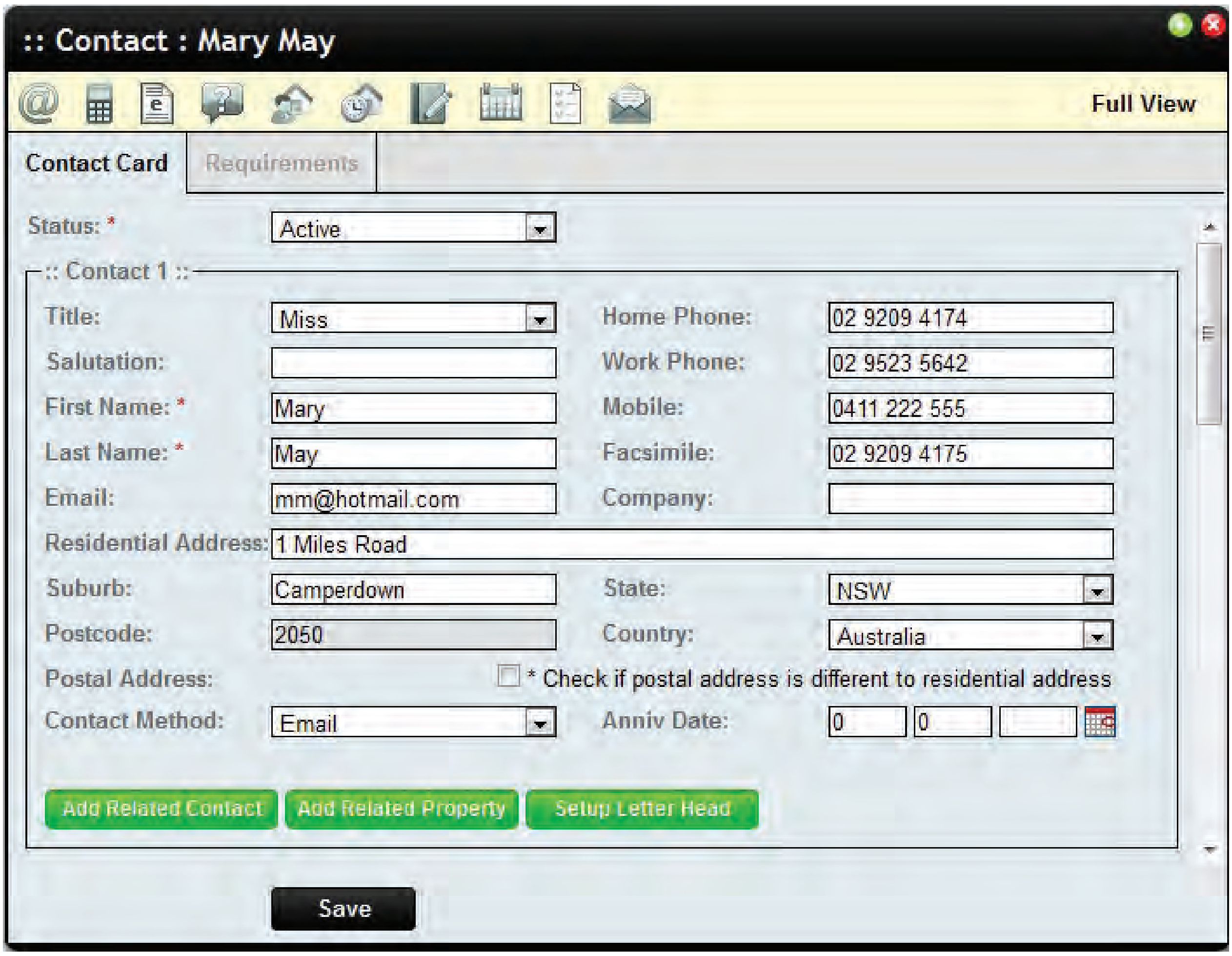
7. You can now view the Related Contact on the main Contact Card tab. Click on their name to open their contact card.



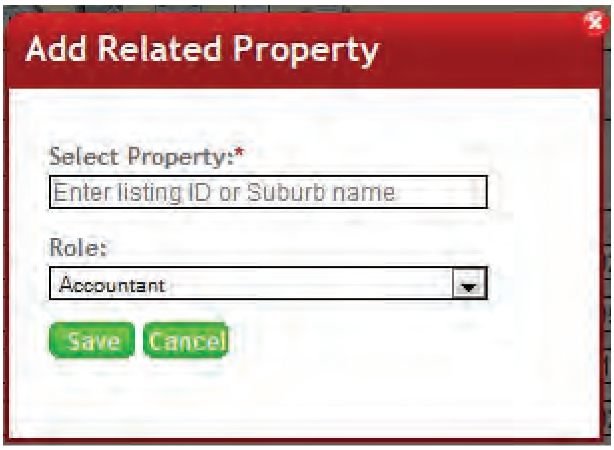
Add Related Property

How to add a Related Property

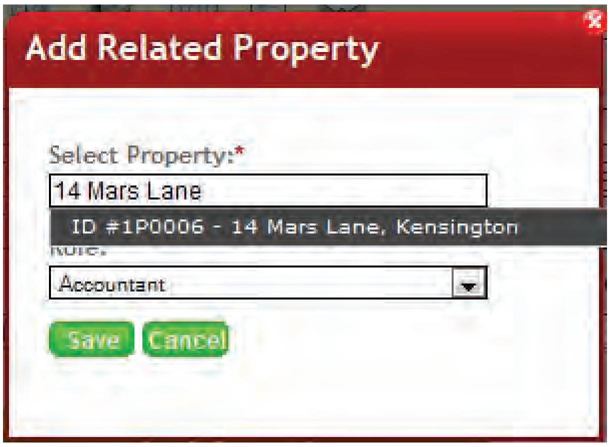
1. Search for your Contact and open their Contact Card



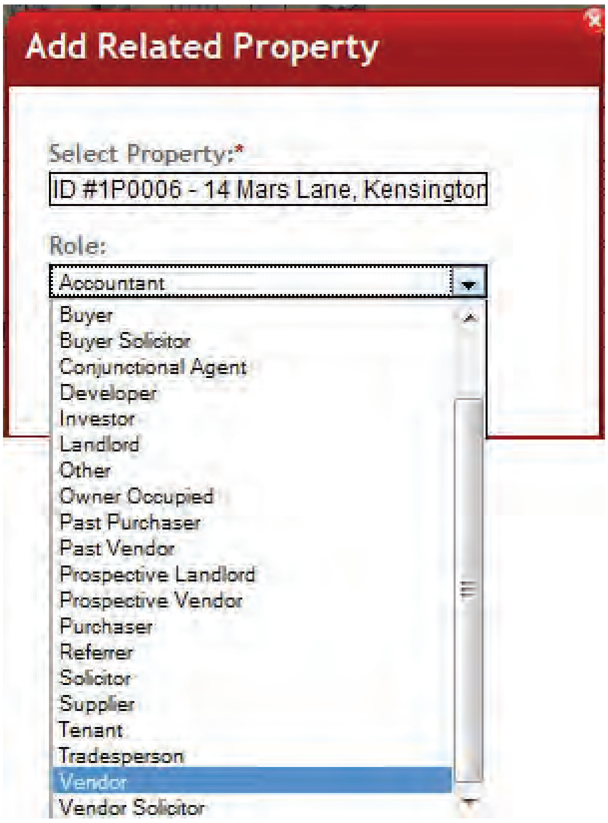
2. On the Contact Card tab click the green Add Related Property button



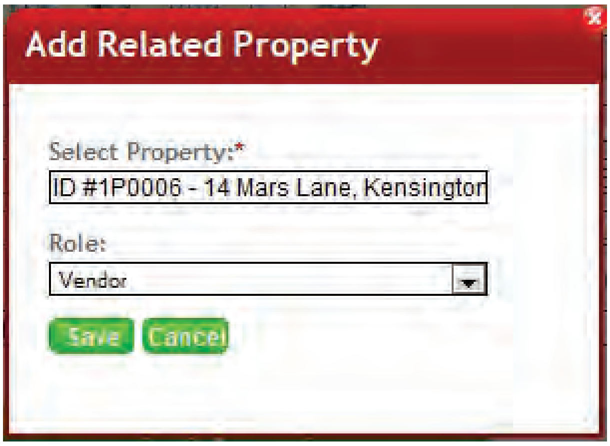
3. Enter the property address in the Select Property:* search box then select the property you would like to relate from the results drop down.



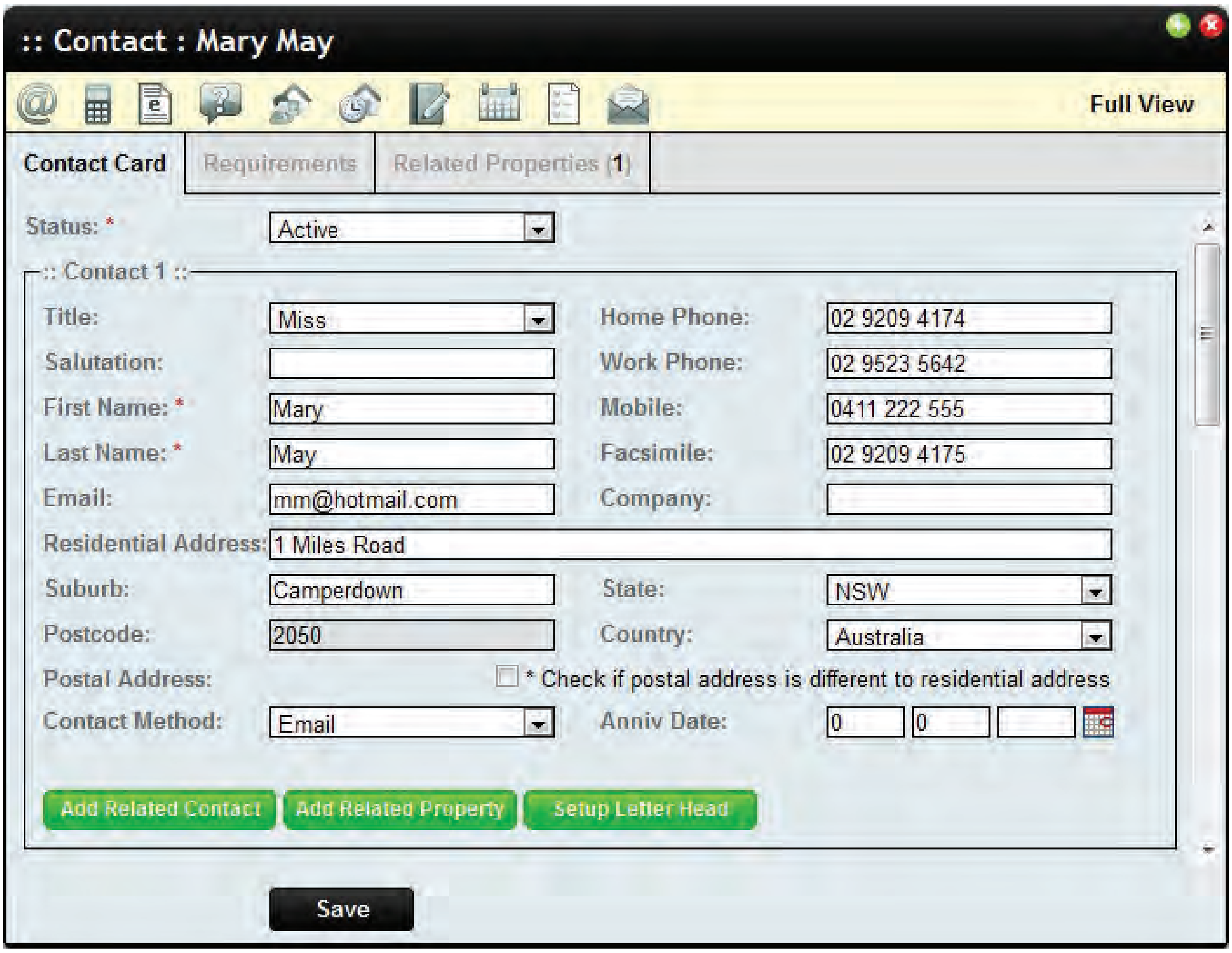
3. Select a Role from the Role drop down menu.



4. Click save to add the related property



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.



Letter Head

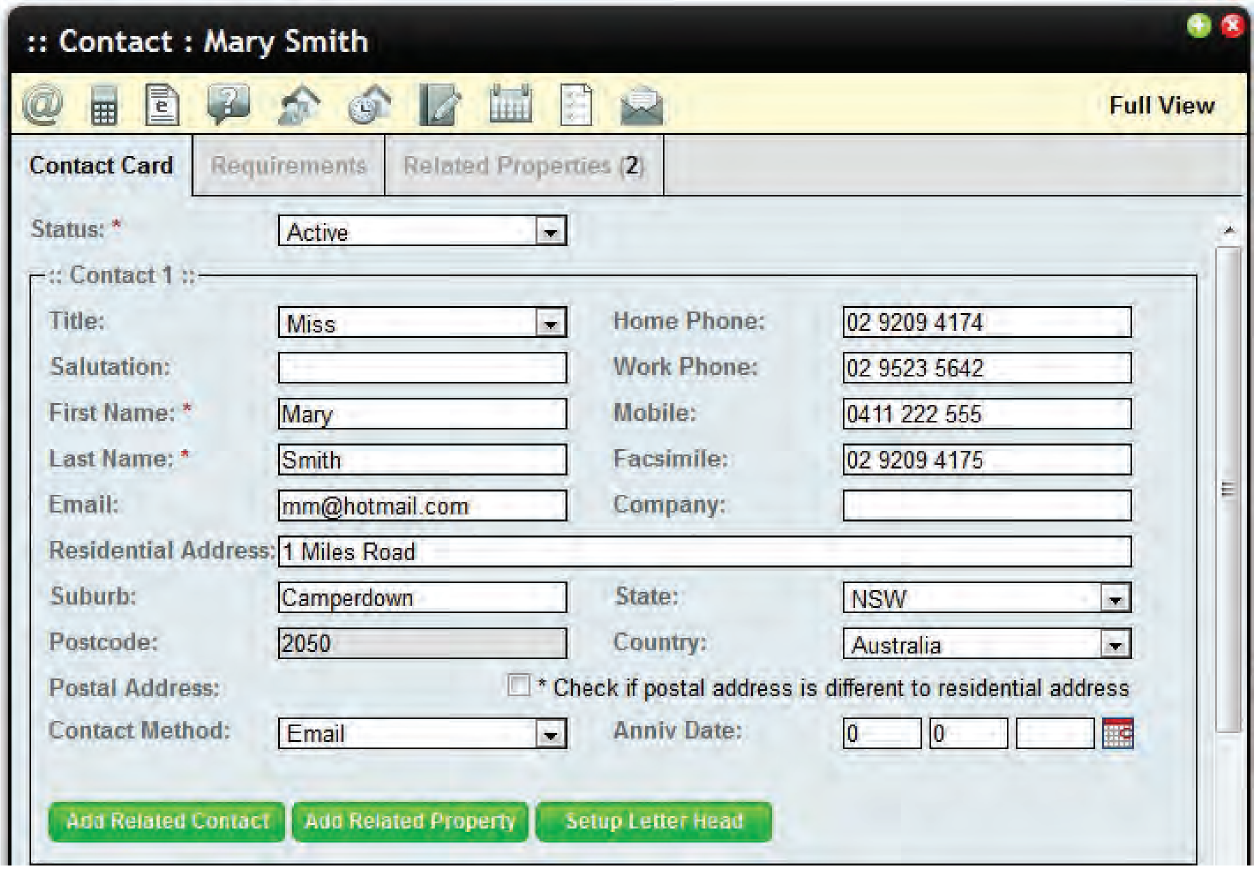
How do I create a letter head for a contact?

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.

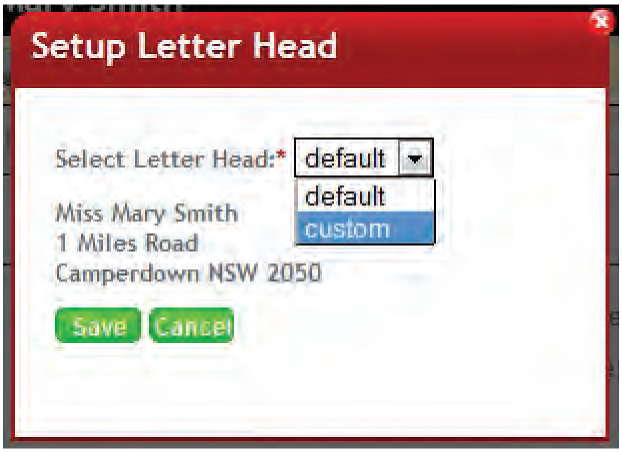
1. Search for your Contact and open their Contact Card



2. On the main contact card click the green Setup Letter head button

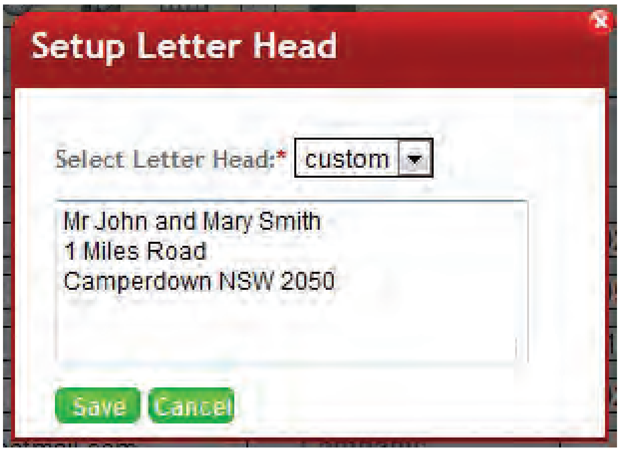
3. By default you will notice this has used the Title, First Name, Last Name, Company Name then either the residential or postal address (if it has been entered)

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



5. Customise the letter head using the free text box.

E.g. Your contact John Smith is married to Mary and you would like to address them together in all communications. .
To include Mary on e-newsletters sent to John you can put John & Mary in the salutation field
To include Mary on all letters sent to John you can customise the letter head to always address Mr John and Mary Smith using this custom feature.



5. Click Save

Search for Contact

How can I search for my Contact?

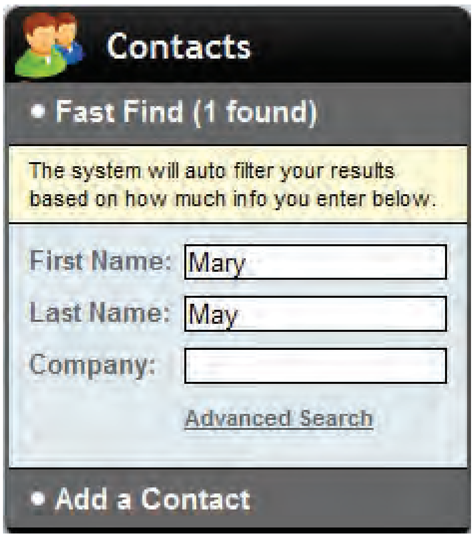
There are three ways in which to search for a contact:

- Through the Left Panel Fast Find
- Through the Universal Search Bar
- Through an Advanced Property Search

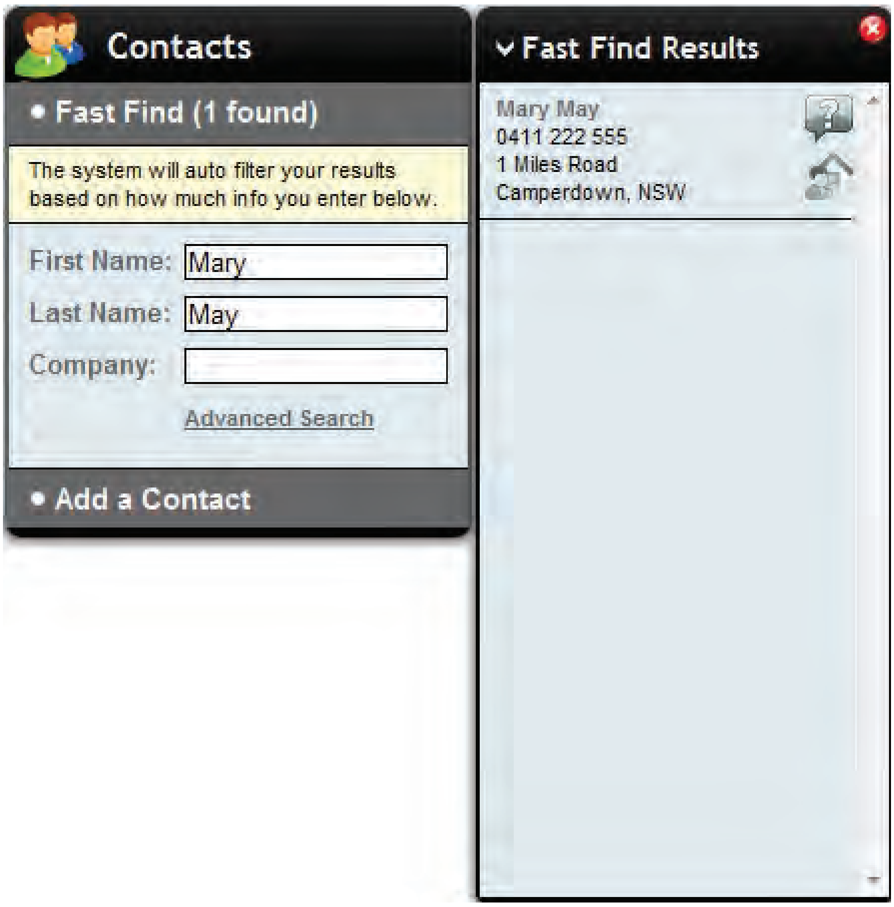
Left Panel Fast Find

1. Click on the Contacts Icon from the mail menu

2. Enter client details in the Contacts Panel



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



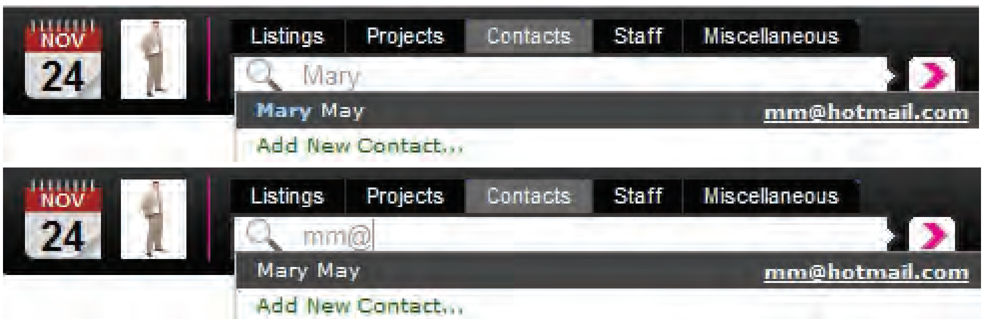
4. Your Contact Card will appear

Universal Search Bar

1. Click on Contacts from the Universal Search Box at the top of the screen

2. Enter Contact name, email address or phone number (please note a minimum of 3 characters is required)

3. Contact Name will appear in a drop down



4. Click on the Contact Name or email address

5. Contact Card will appear on screen

Advanced Contact Search

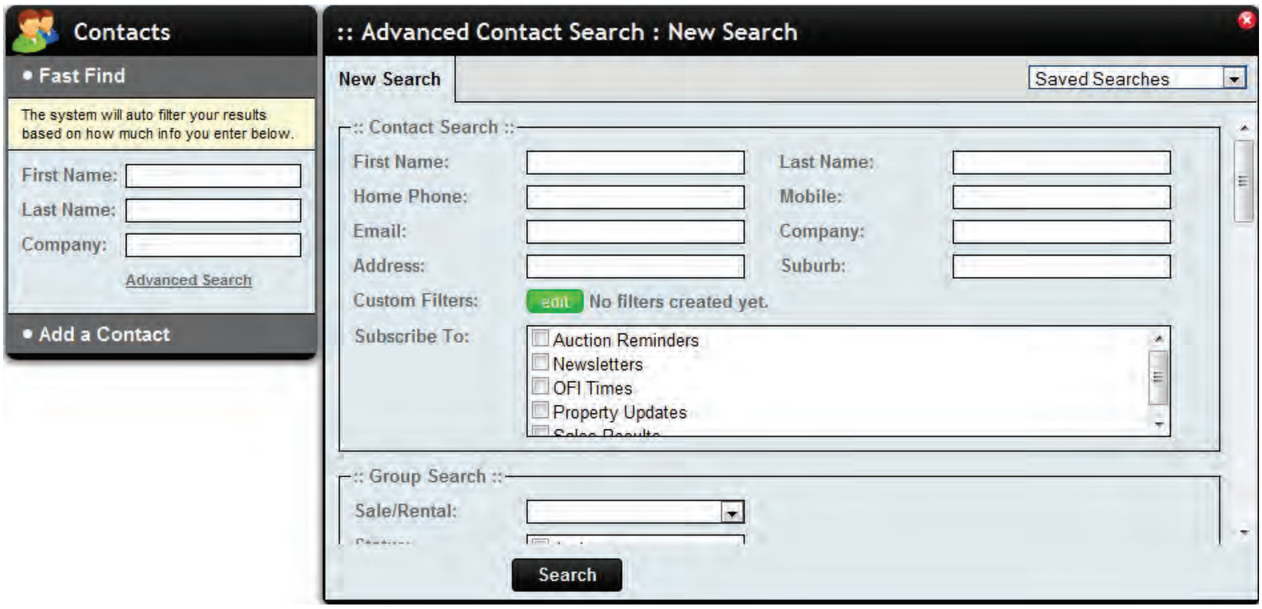
1. Please follow the steps under the Advanced Contact Search topic.

Advanced Contact Search

How do I search for a group of Contacts?

1. Click on the Contact icon from the main menu

2. Click on Advanced Search from the left panel



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

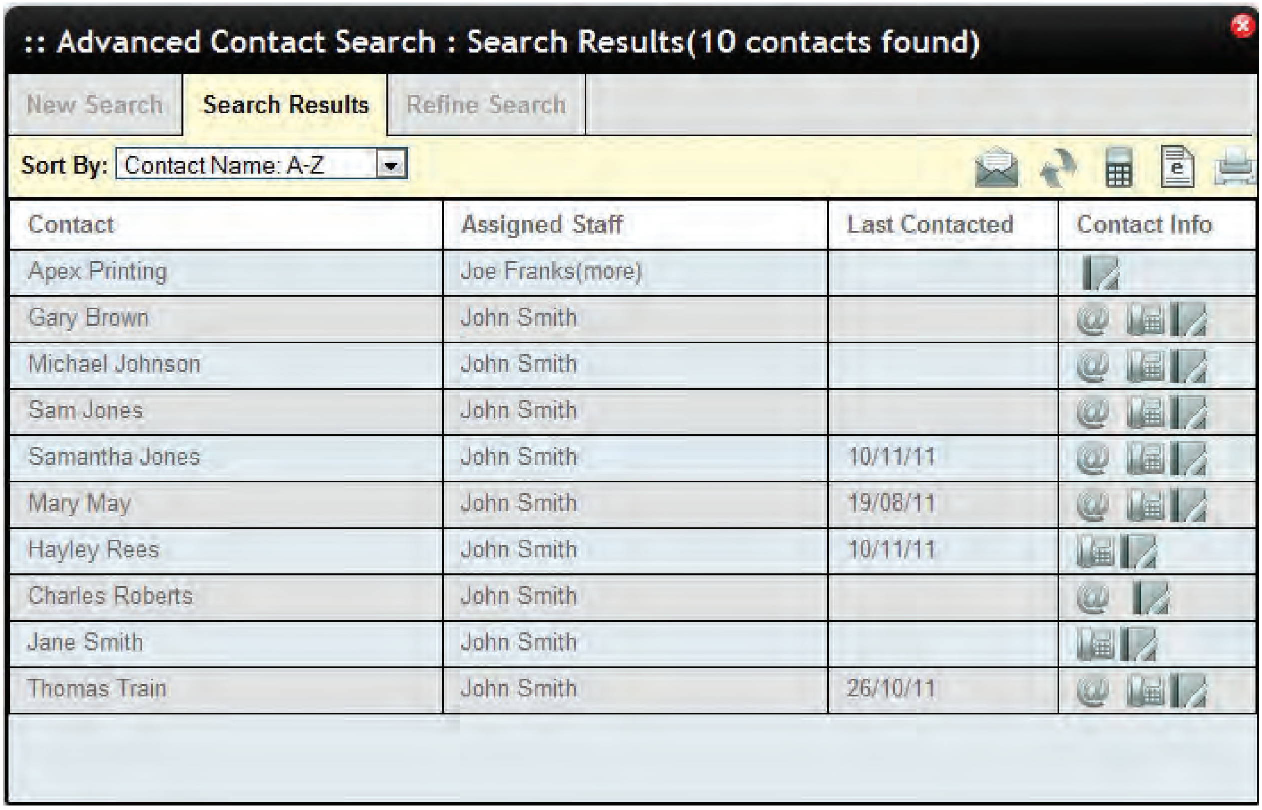
* Group Contact Search Fields:
    * For Sale, For Lease
    * Status: Active, Archived, Do Not Contact, Unsubscribed
    * Class Group
    * Custom Class
    * Contact Class: Accountant, Buyer, Buyer Solicitor, Conjunction Agent, Developer, Investor, Landlord, Owner Occupier, Referrer, Solicitor, Supplier, 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

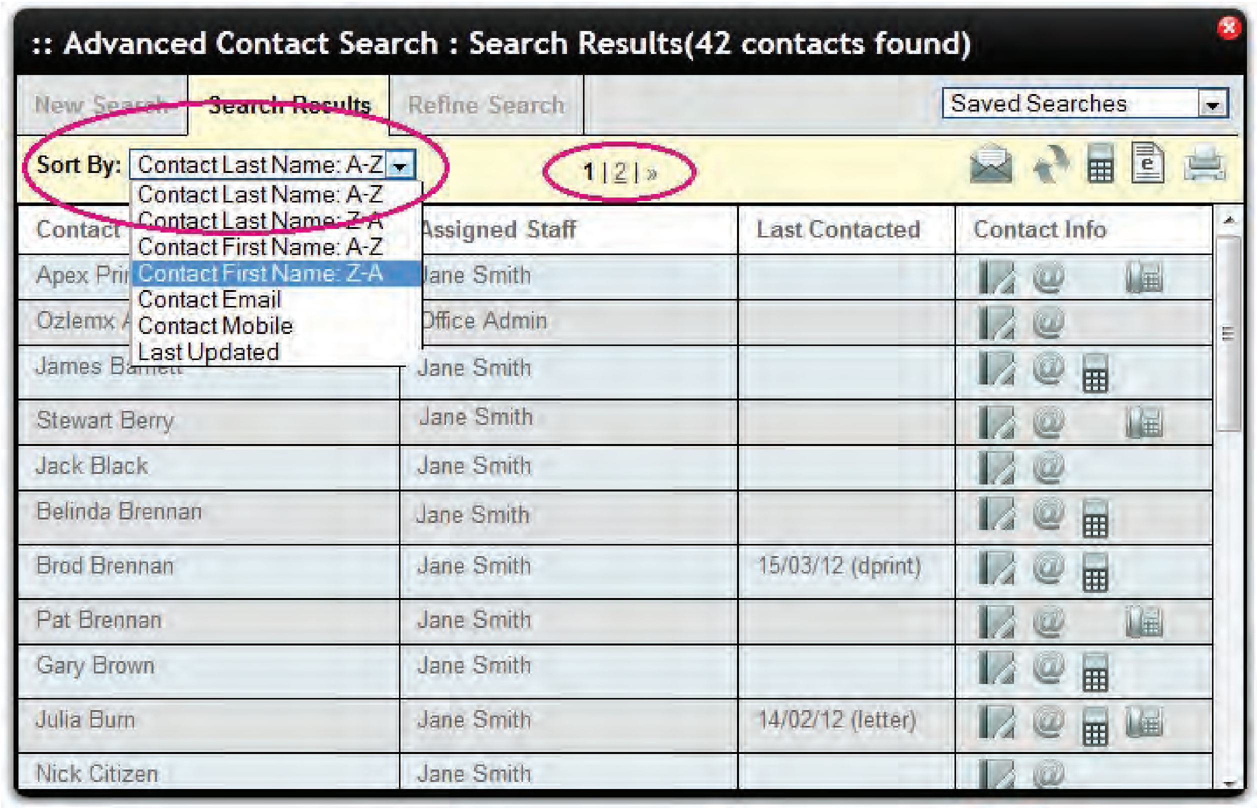
    * Assigned Staff
    * Property Related? (Tick this box if you would like an additional function to search by the address of a property related to a contact.)
    * Contact Source:
    * Date Range for ‘Created From' , 'Modified From' and 'Anniversary Date' lookups
    * Save Search?

4. Click Search

5. Your Target List will appear on screen



6. You may sort your Target List via the Sort By drop down as well as scroll through your list using the Page Numbers. (Page Numbers will only appear if the number exceeds the first page limit).

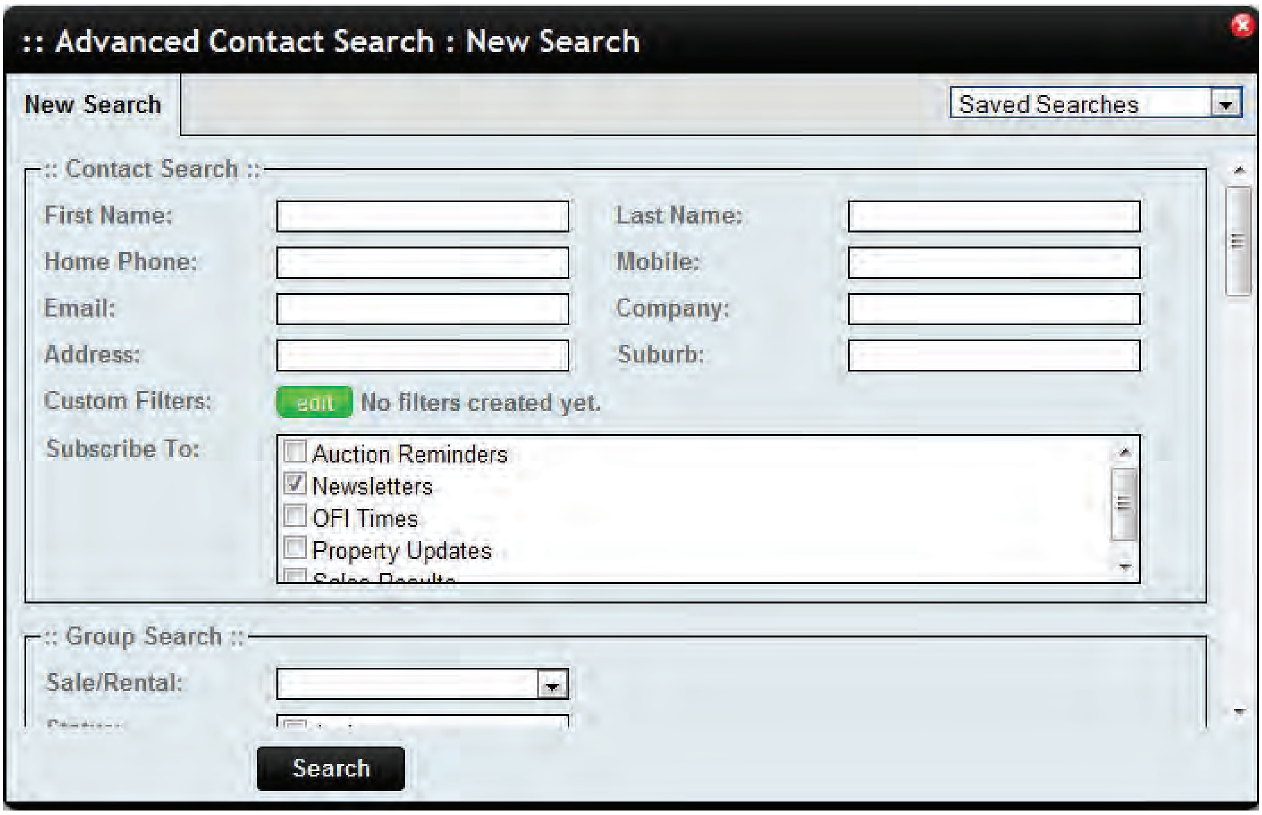


7. Once you have generated your Target List you may generate a Mail Merge, download the list as a CSV file, send an SMS or an E-Newsletter or print a Contact Report via the Action icons.

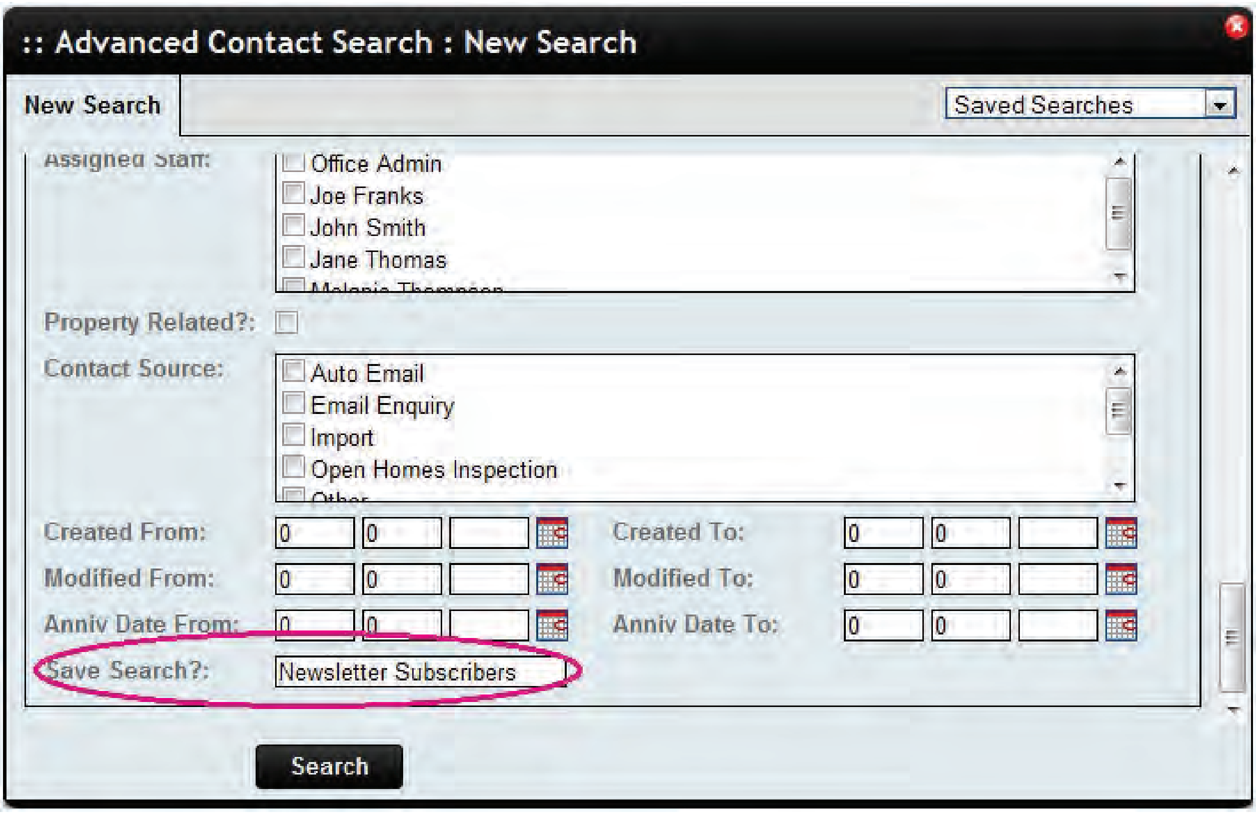
How do I save my Contact Search in Agentbox?

**Note: the saved search will save the search criteria, not the actual results therefore any new contacts will appear each time you run the search.*

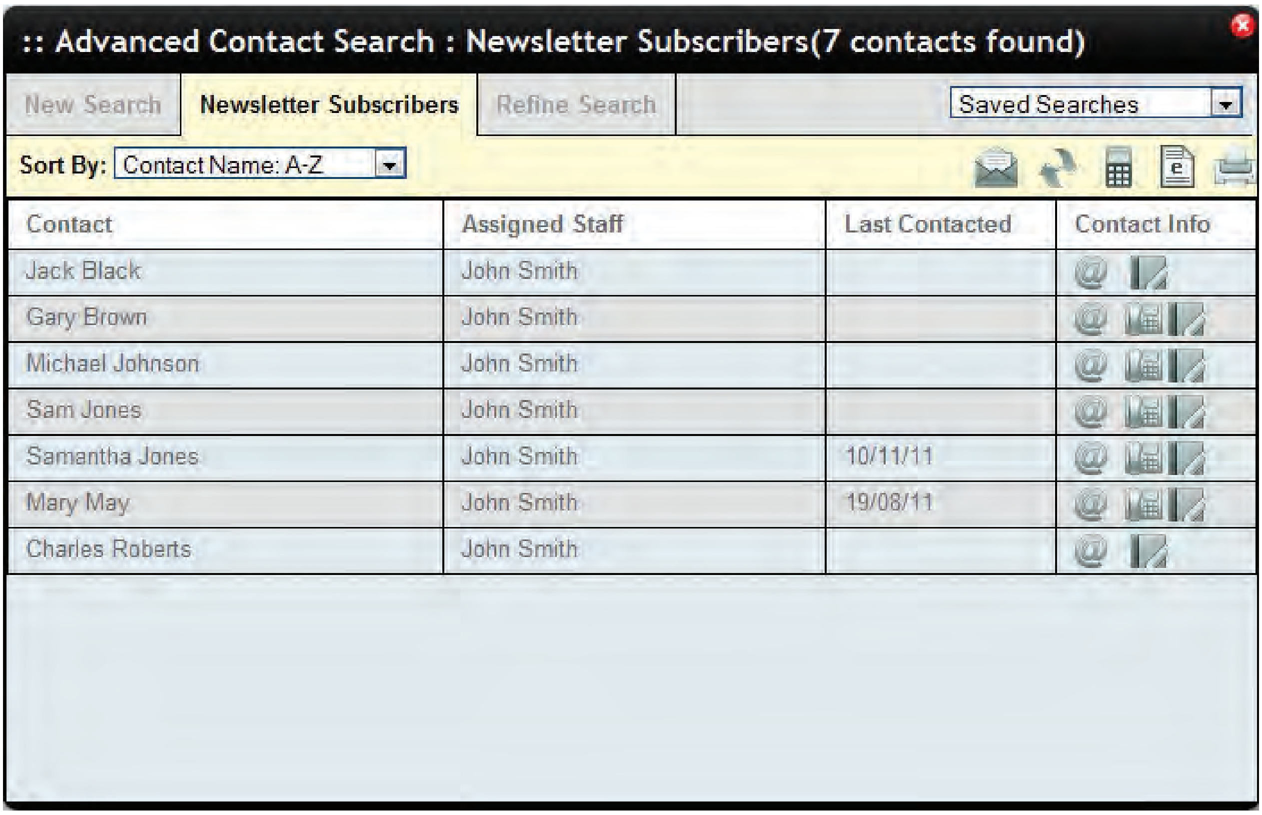
1. Open the [Advanced Contact Search](#) panel
2. Enter your Search Criteria into the appropriate fields



3. In the Save Search field enter your Search name

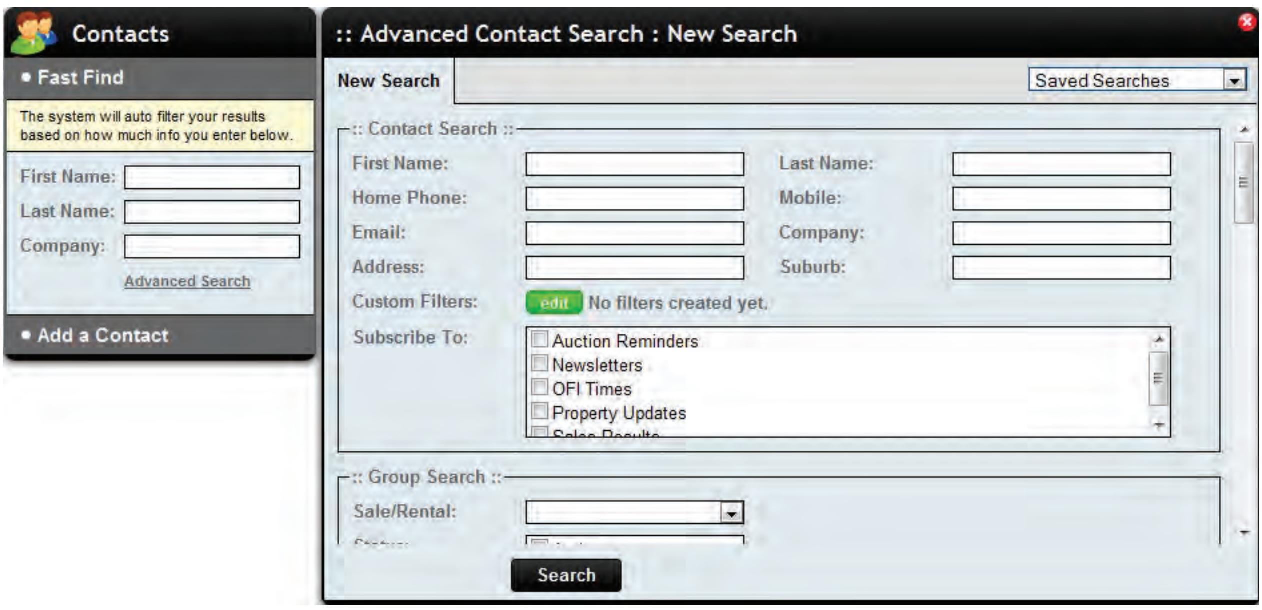


4. Click on Search

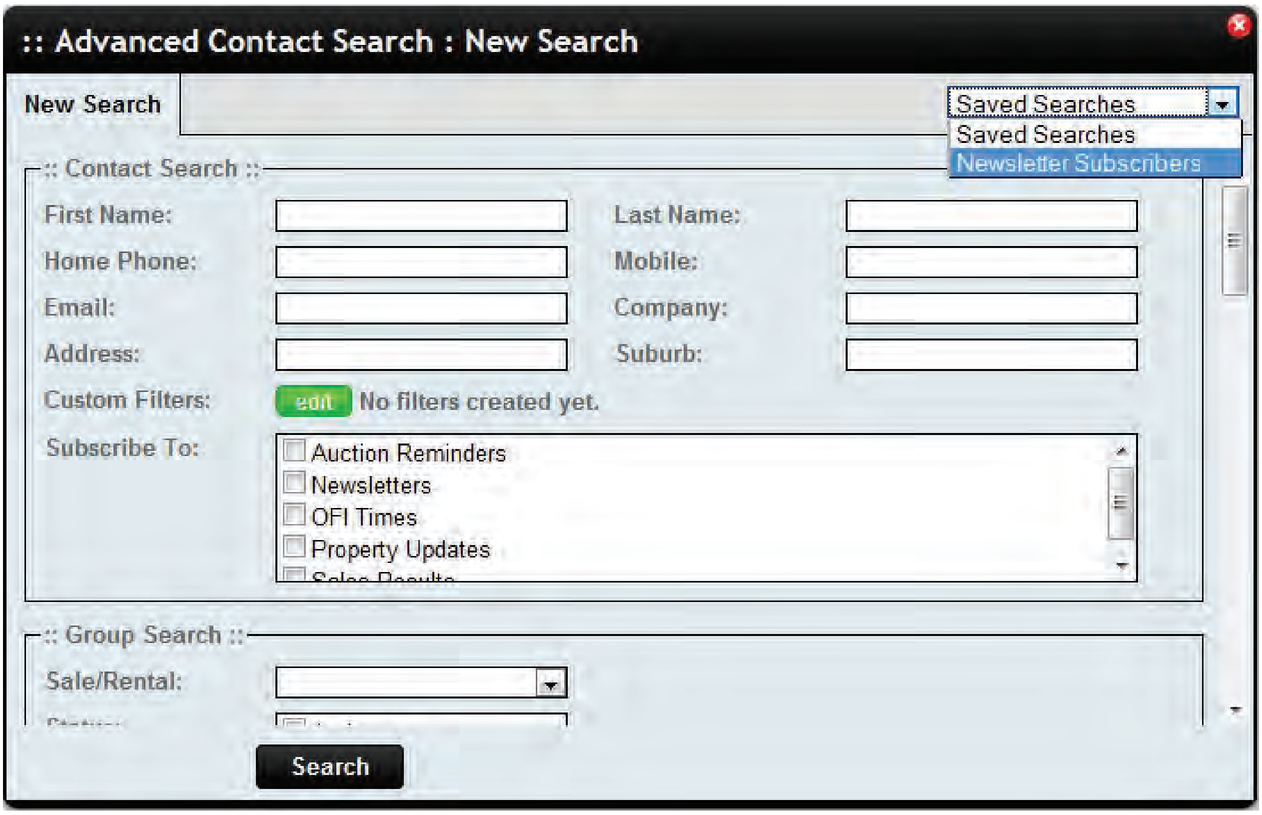


How do I find my Saved Search in Agentbox?

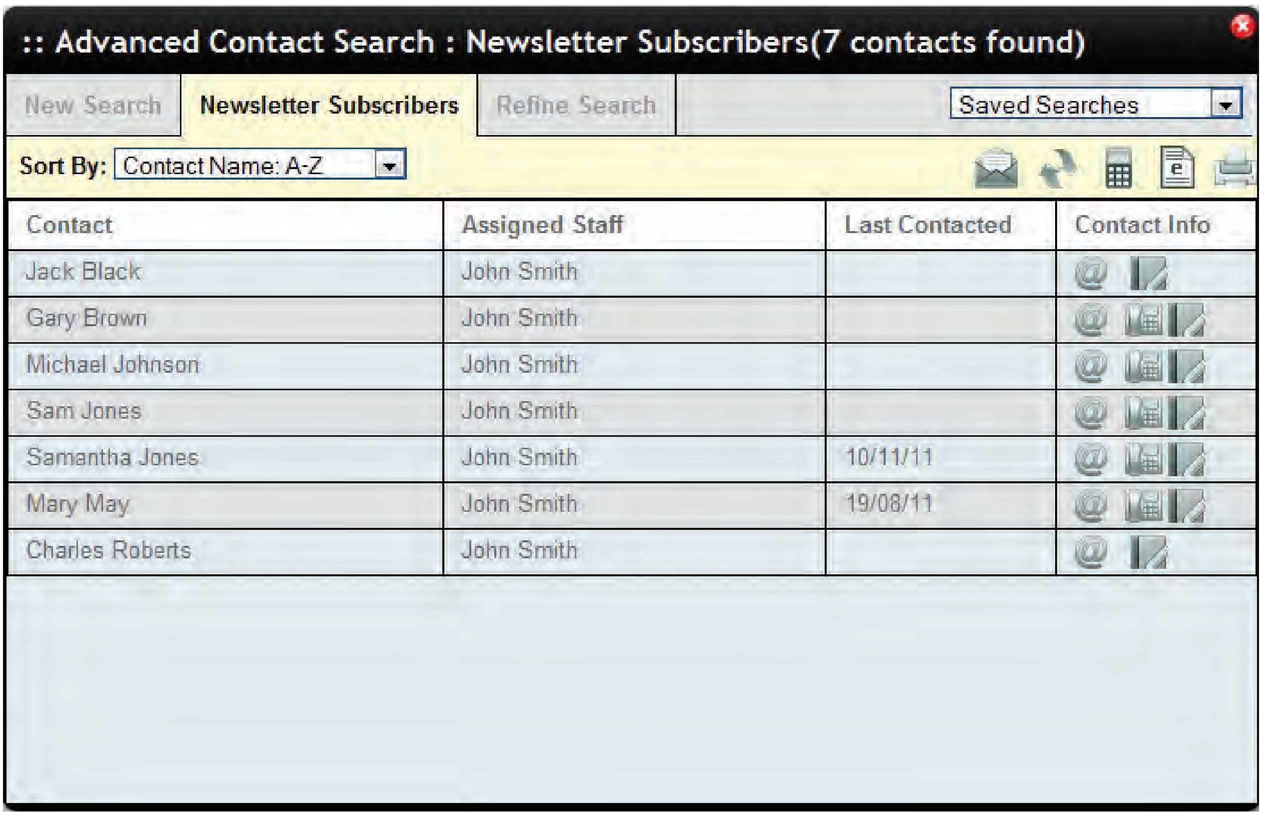
1. Click on the Contact icon from the main menu
2. Click on Advanced Search from left panel



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

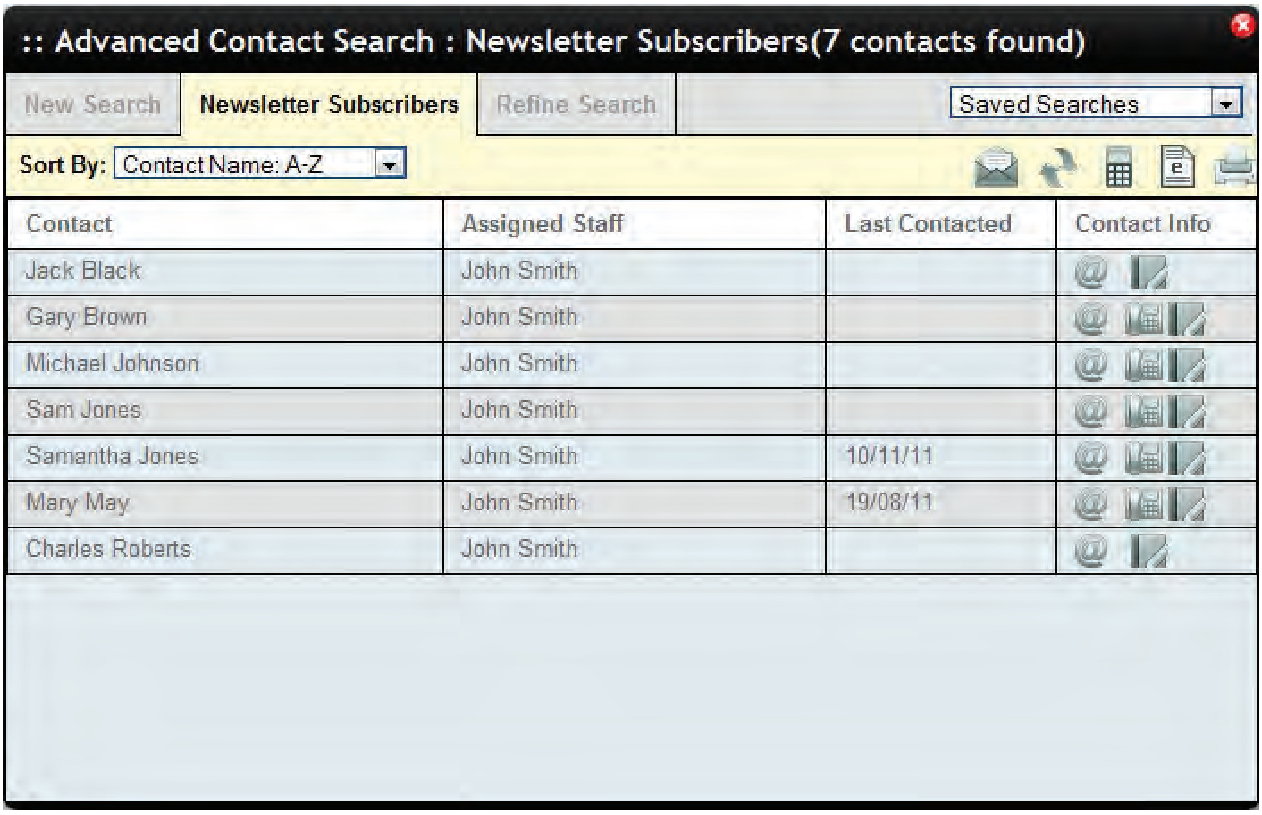


4. Your Target List will appear on screen

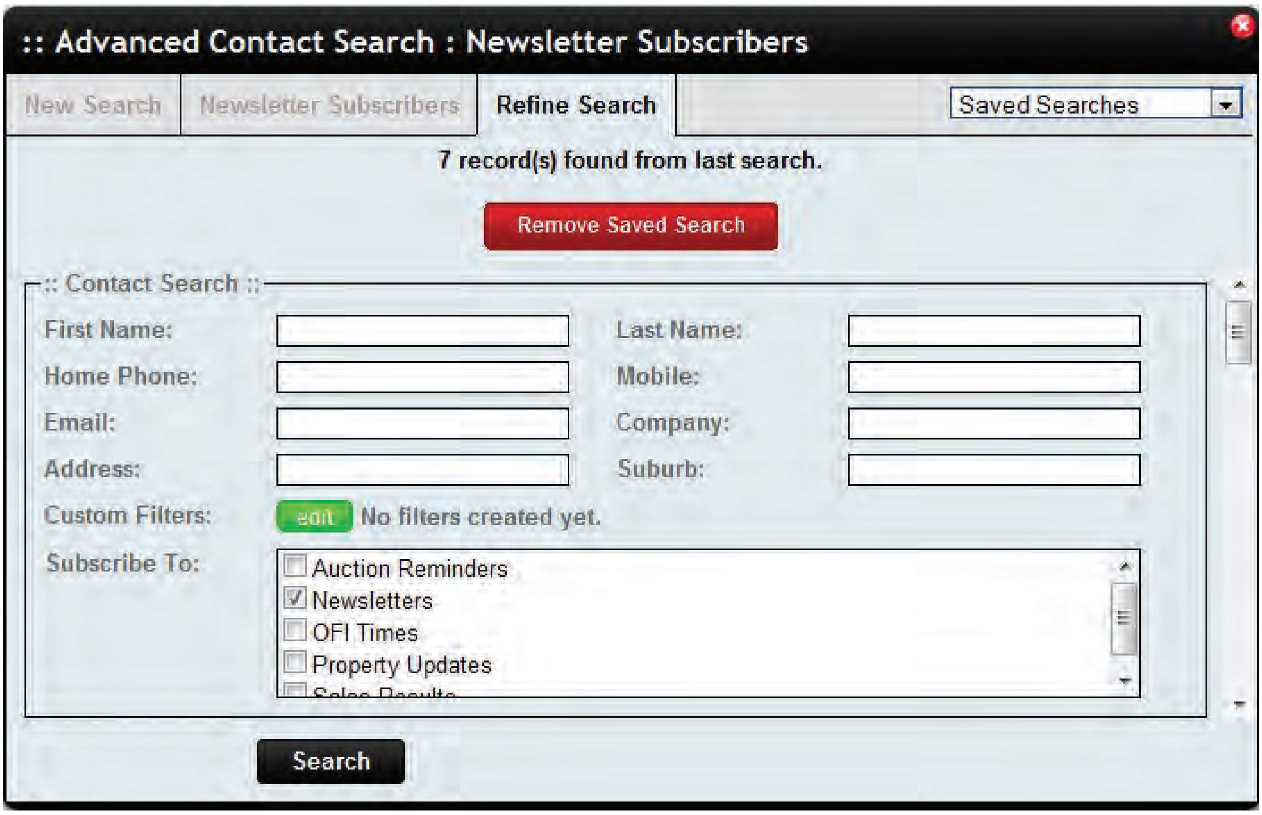


How do I edit a saved contact search?

1. Open one of your saved searches.



2. Click on the Refine Search tab

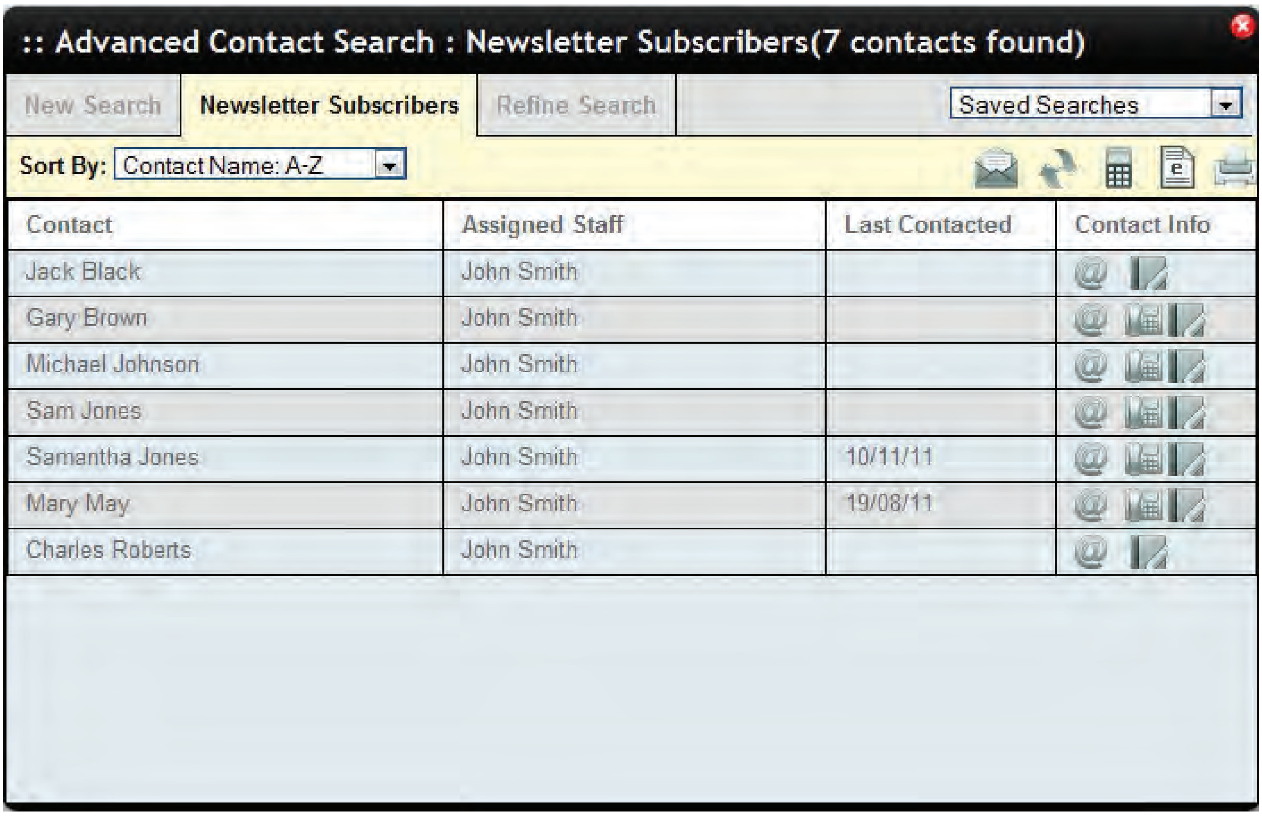


3. Alter search requirements as you wish

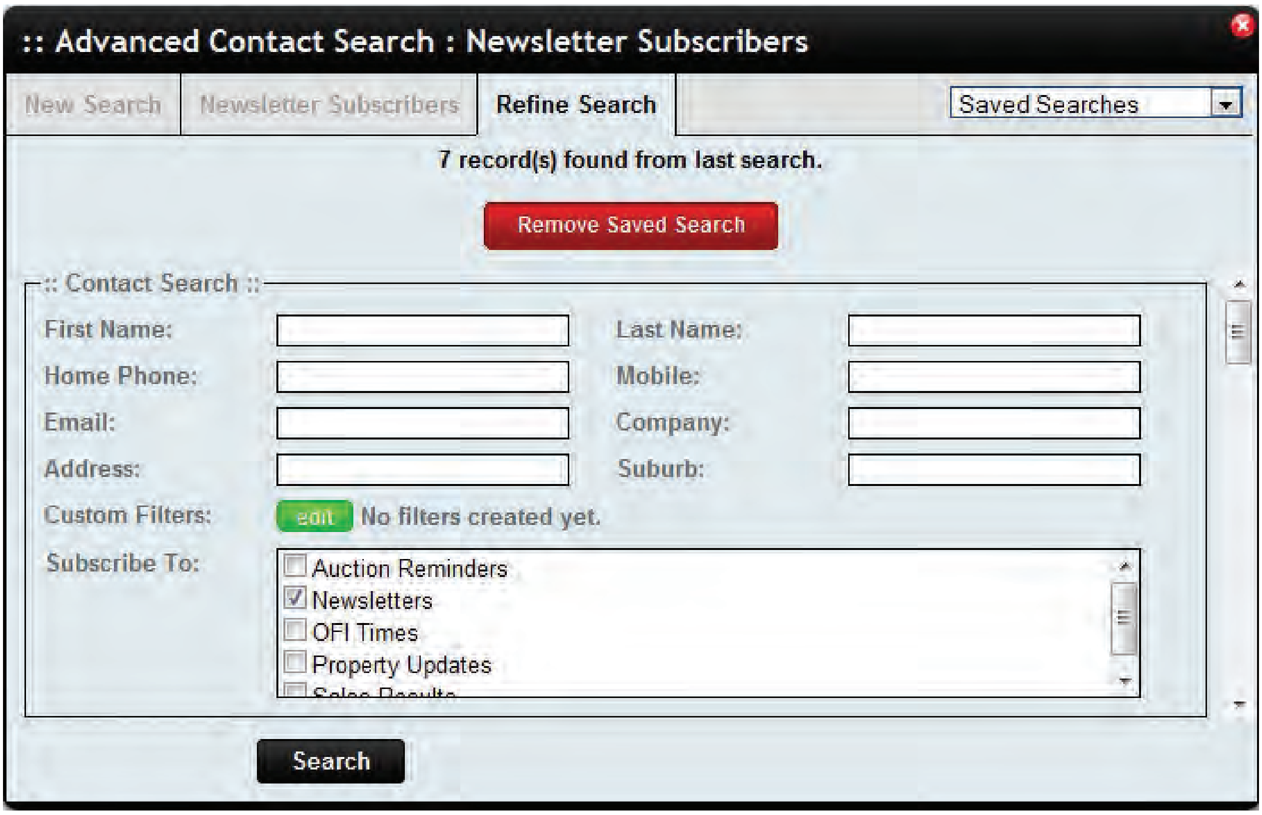
4. Click Search.

How do I remove a saved contact search?

1. Open one of your saved searches.

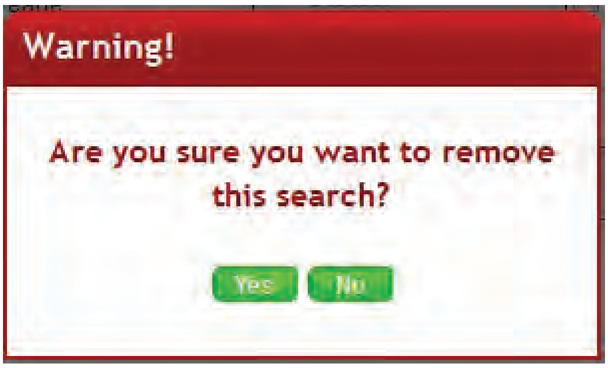


2. Click on the Refine Search tab.



3. Click on the red Remove Saved Search button

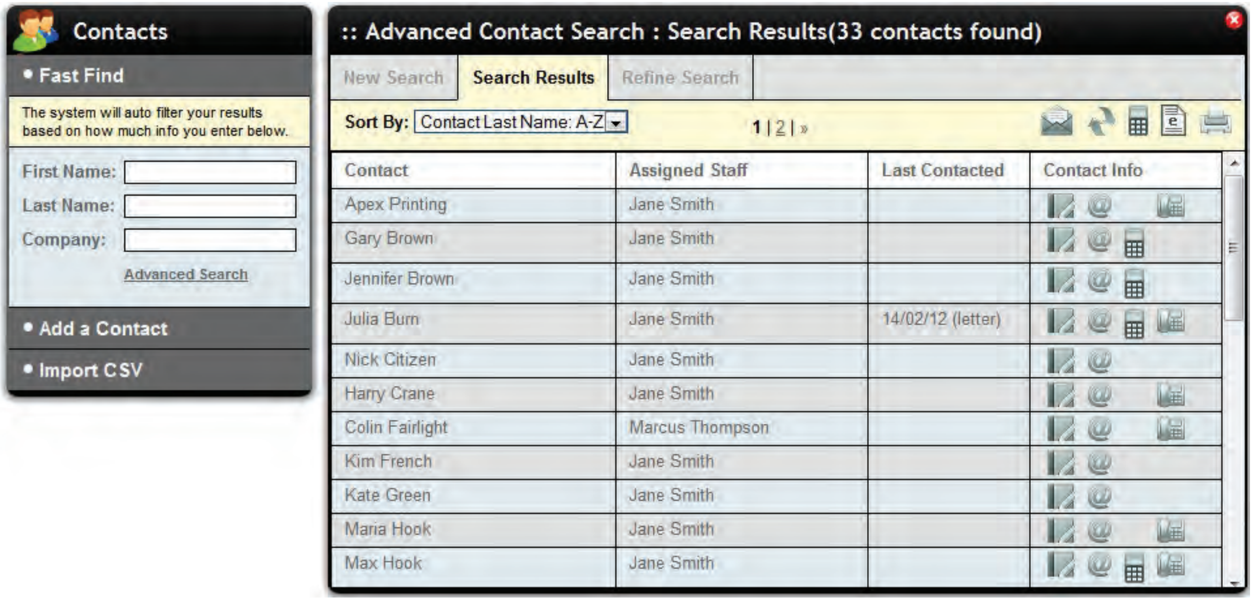
4. Click Yes



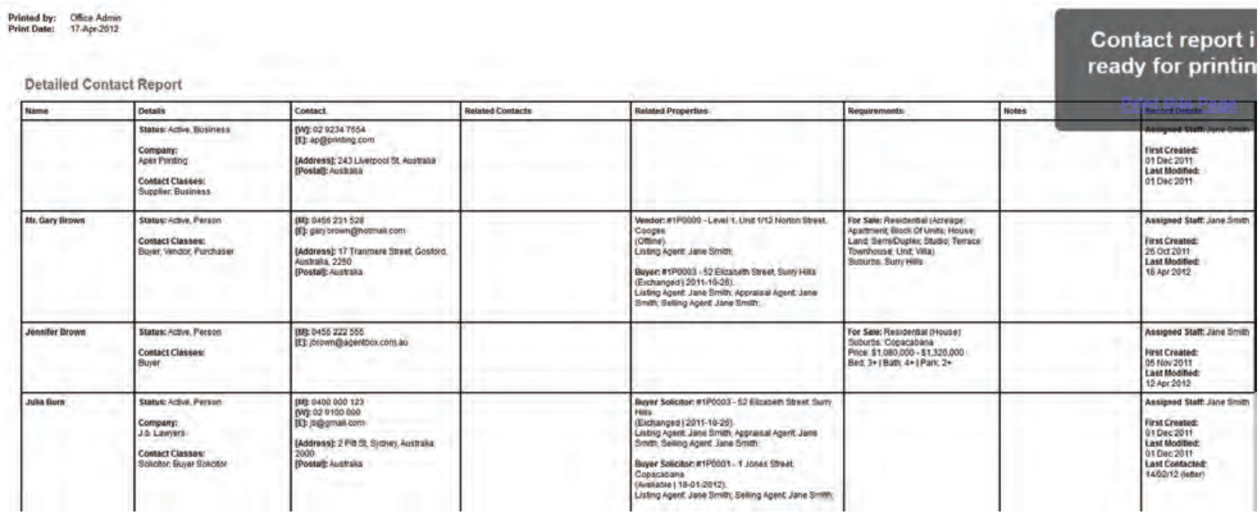
Print Detailed Contact Report

How do I print a detailed contact report?

1. Complete an Advanced Contact Search to open your target list of contacts
2. Click on the print icon at the top of the search results 



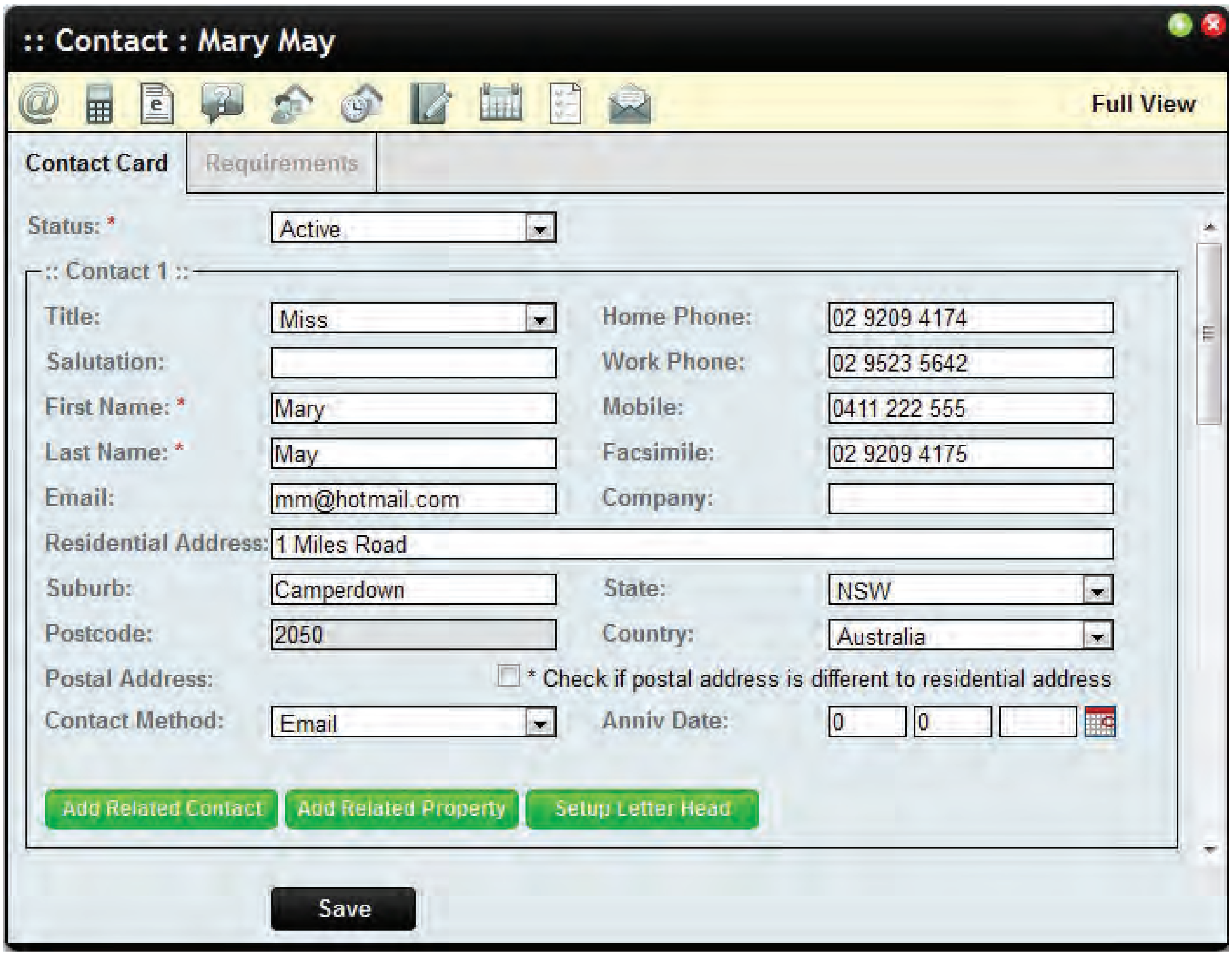
3. Your detailed listings report will open in a new tab or window and contains the contact name, details including contact classes, company name and status, contact address, phone numbers and email, related contacts, related properties, requirements and last 3 notes.



Subscribe Contacts

How to Subscribe Contacts to E-Newsletters?

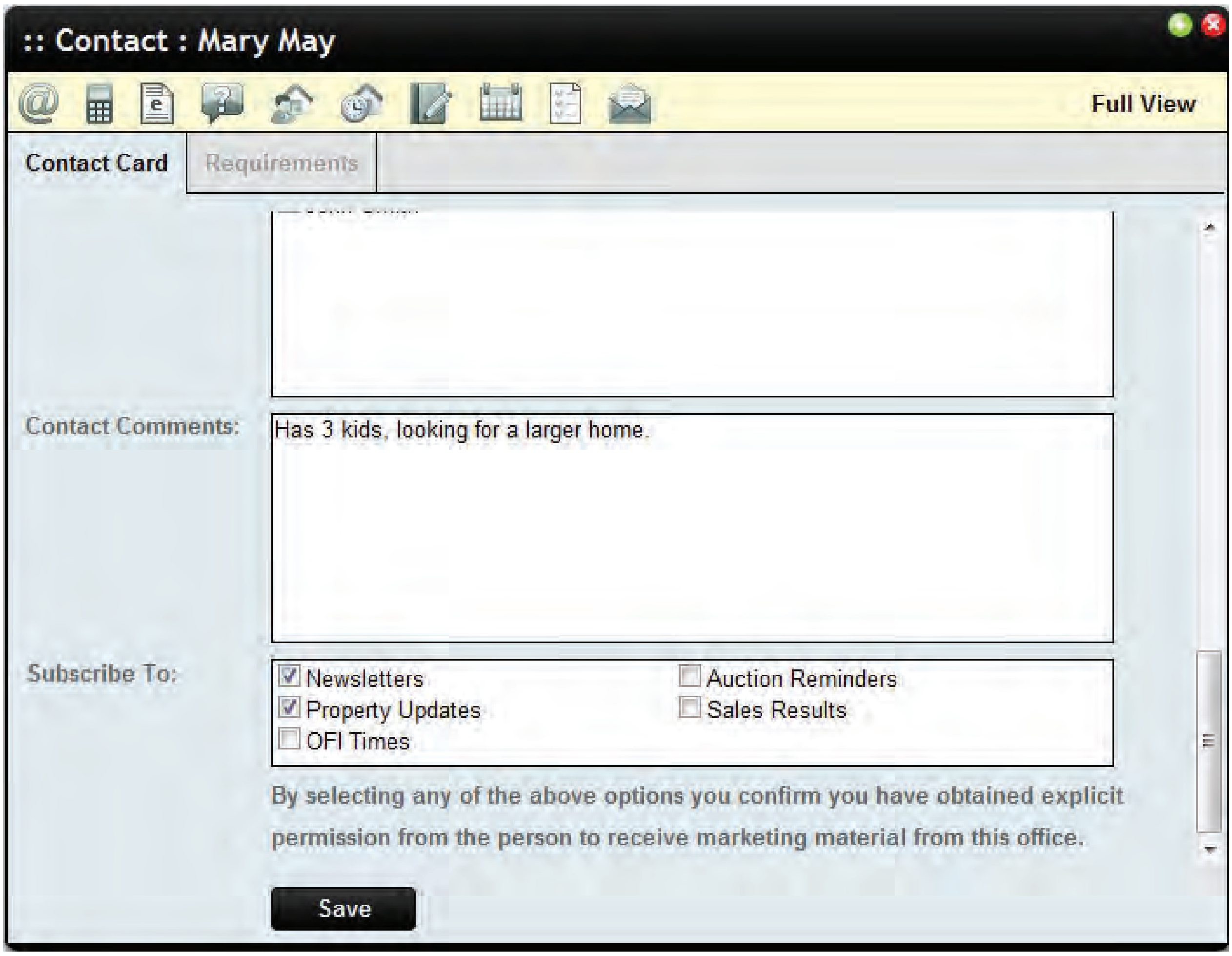
1. [Search for your Contact]() and open their [Contact Card]()



2. At the bottom of the Main Contact card you can subscribe the contact to a number of subscription categories by ticking their corresponding check box.
**Note: Only contacts that have the corresponding check box ticked on their contact card will be sent an E-Newsletter when sending a bulk e-newsletter via the Advanced Contact Search.*

- **Newsletters** - Newsletters will add the contact to the subscribers recipient list to all manually created mass e-newsletter blasts. This is the contacts consent to send bulk e-newsletters to them. To send an e-newsletter conduct an Advanced contact search for subscribers, then generate and send an e-newsletter
- **Property Updates** - If a contact is subscribed to Property Updates they will automatically receive an E-Newsletter containing new or updated properties that match their requirements. These are sent once a day and will only be sent if a new property has been made Available or a matching property has been updated that day.
- The **OFI Times, Auction Reminders and Sales Results** check boxes are used as subscriber search sorters to help you easily generate a target list of contacts. The contact will also need to be subscribed to Newsletters. These newsletters are to be created manually (this may differ depending on your office set up). Conduct an Advanced contact search for subscribers, then generate and send an e-newsletter

**Note: By selecting any of the above options you confirm you have obtained explicit permission from the person to receive marketing material from your office.*

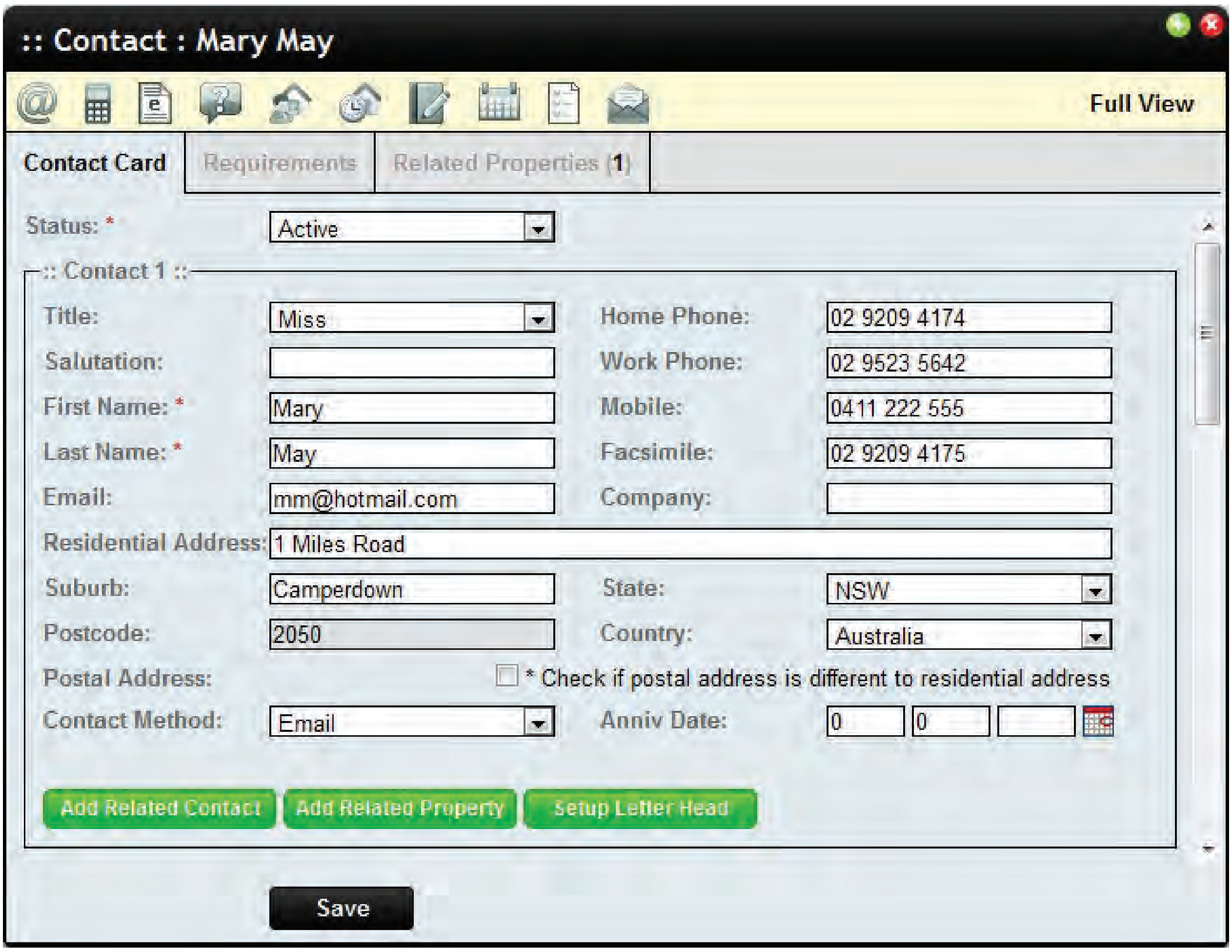


3. Click Save

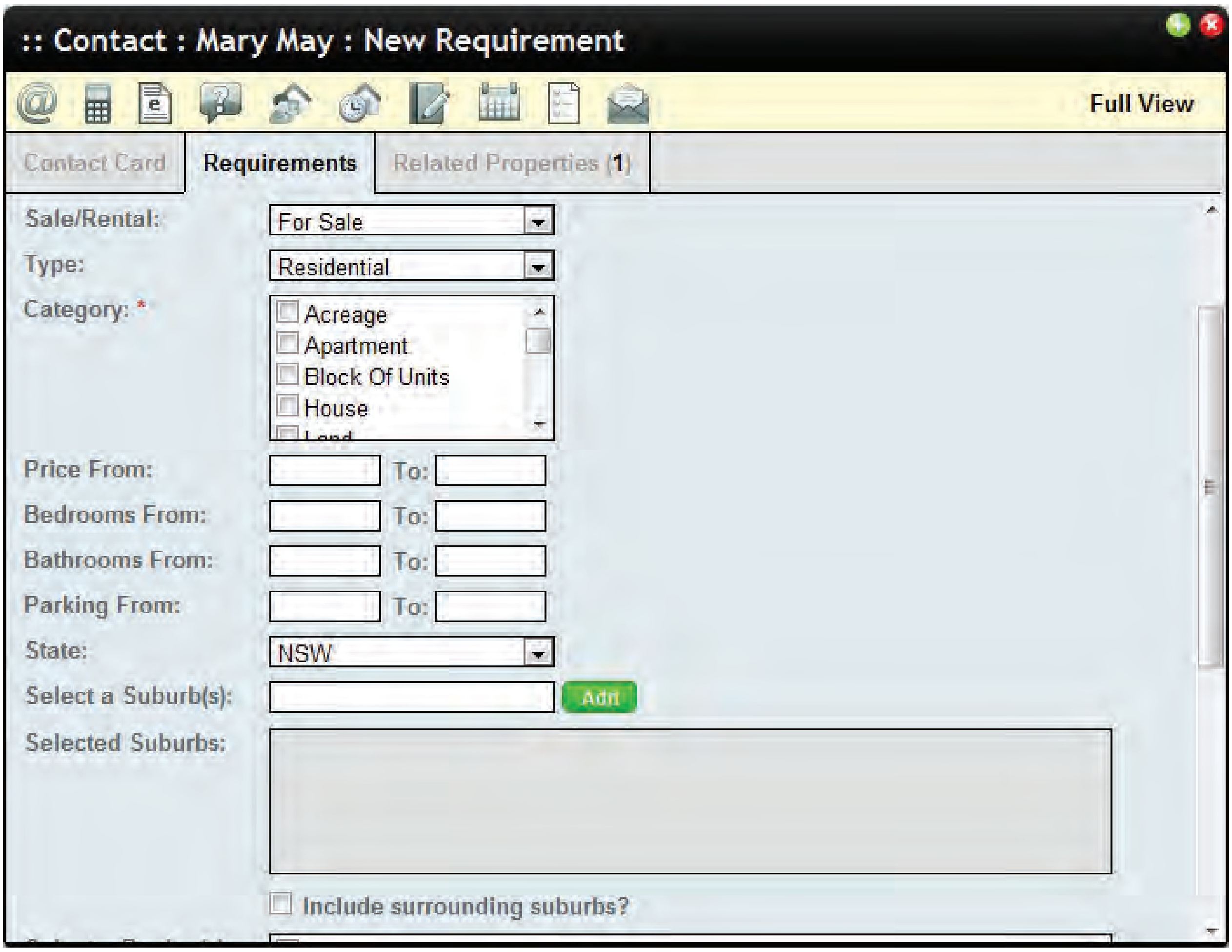
Add Buyer/Tenant Requirements

How do I add Buyer/Tenant Requirements?

1. Search for your Contact and open their Contact Card

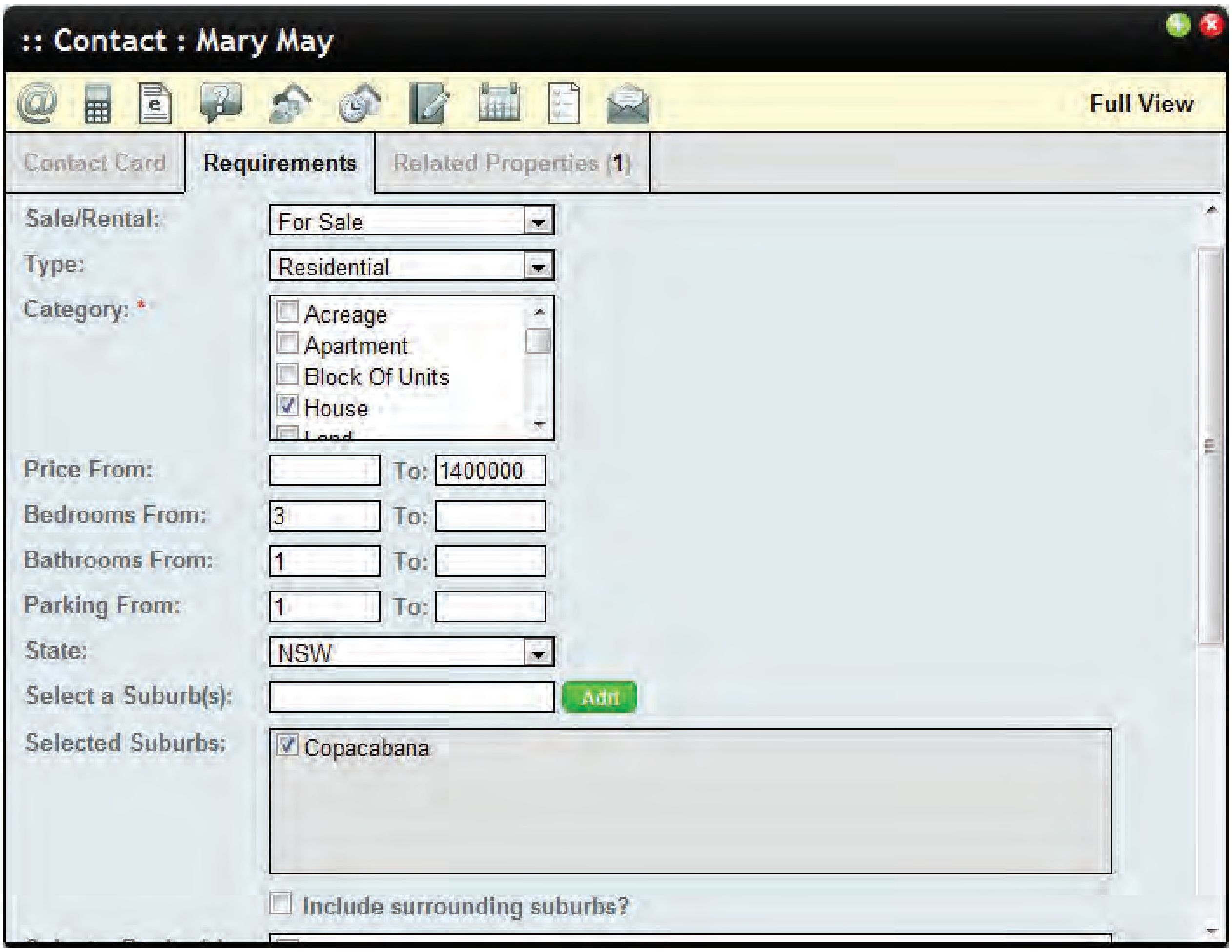


2. Click on the Requirements tab



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

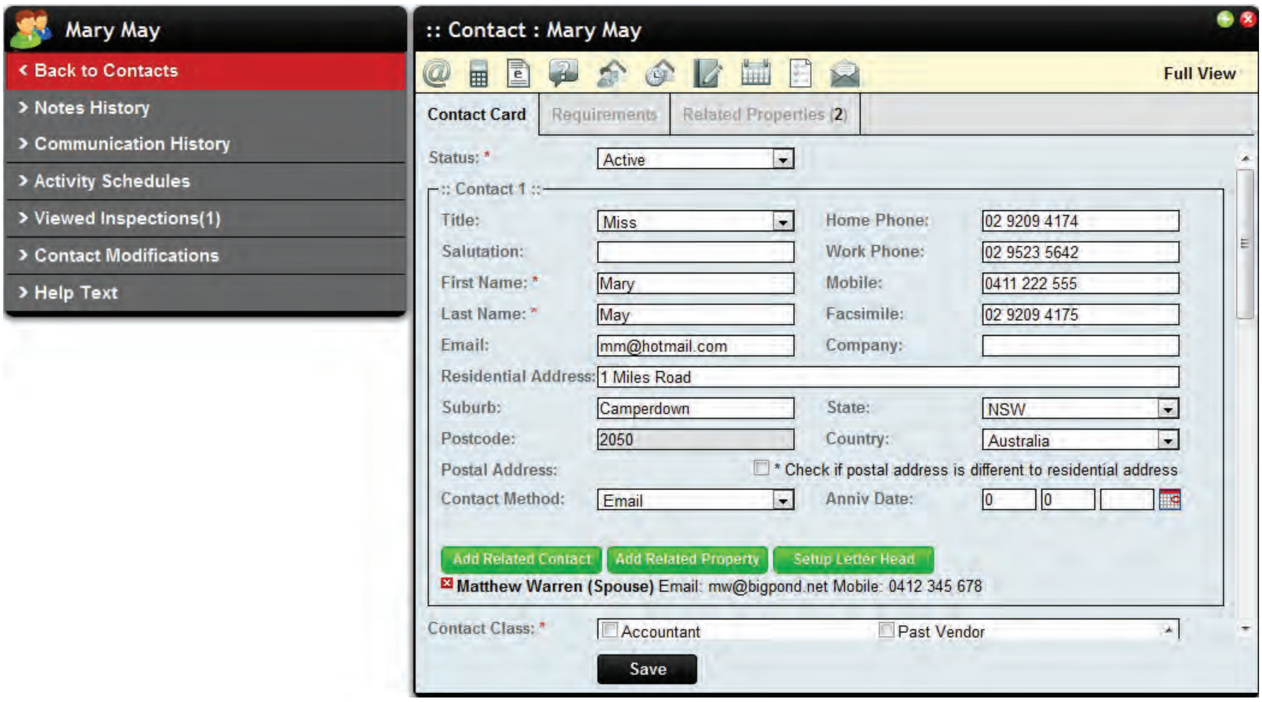


4. Click Save

View Contact Inspections

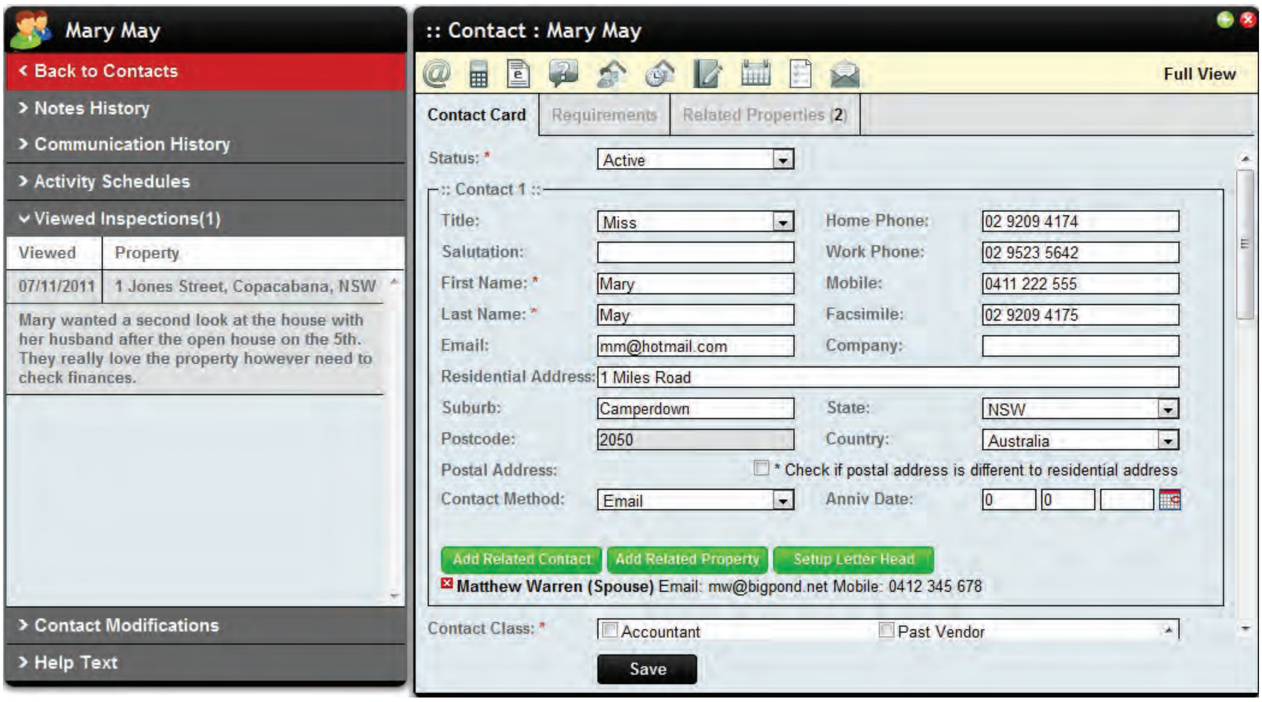
How do I view properties a contact has inspected?

1. Search for your Contact and open their Contact Card

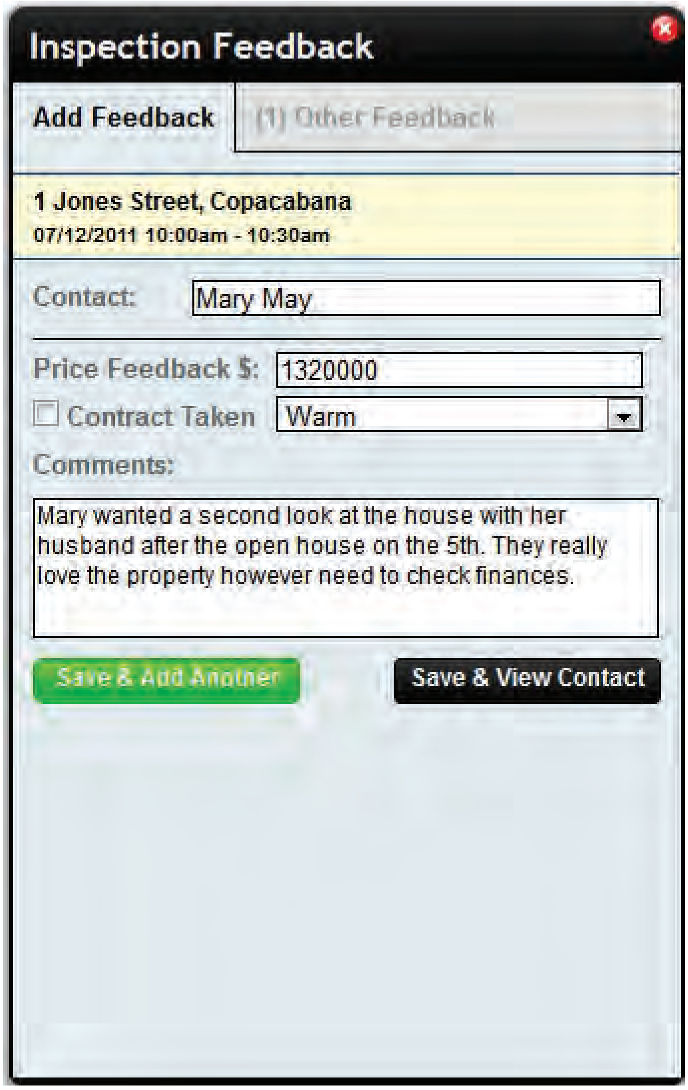


2. On the left panel click Viewed Inspections (If the matching left panel is not visible, click Full View in the top right hand corner of the contact card).

3. You will see a list of properties they have inspected and their comments.



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



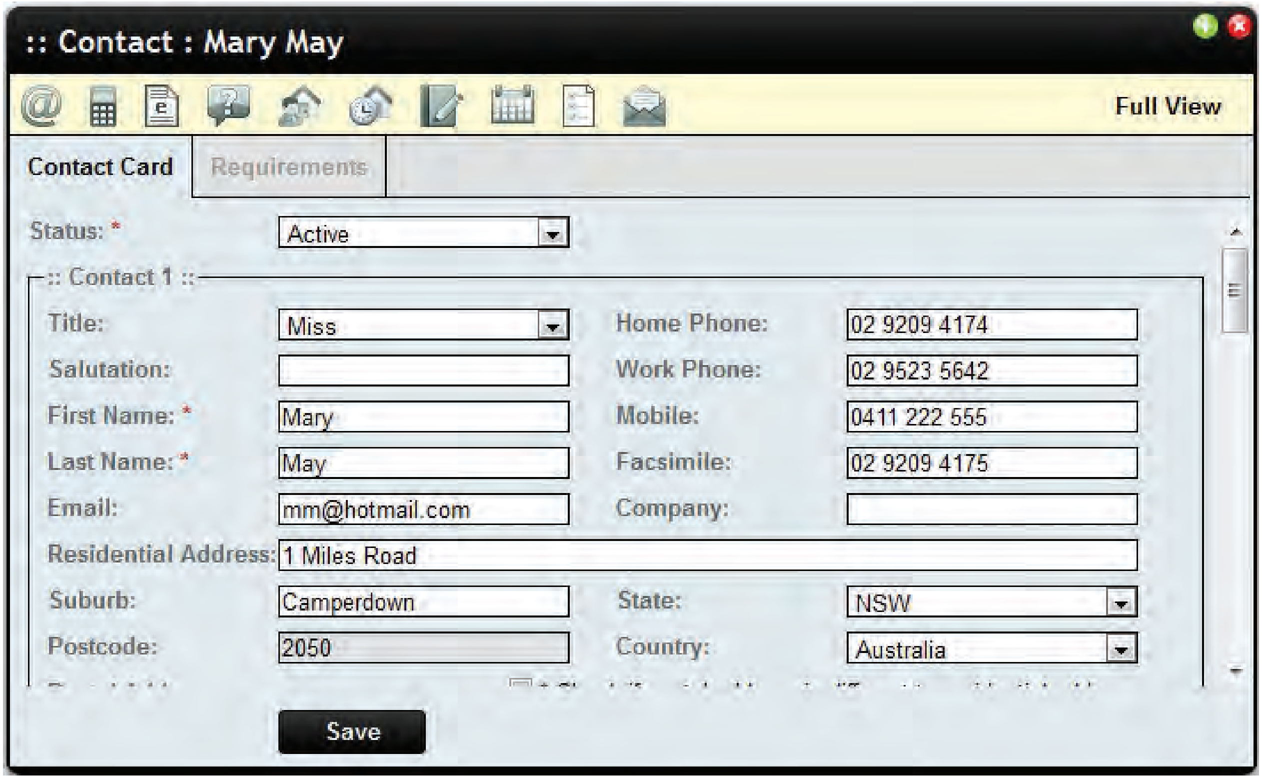
You may also like...

[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

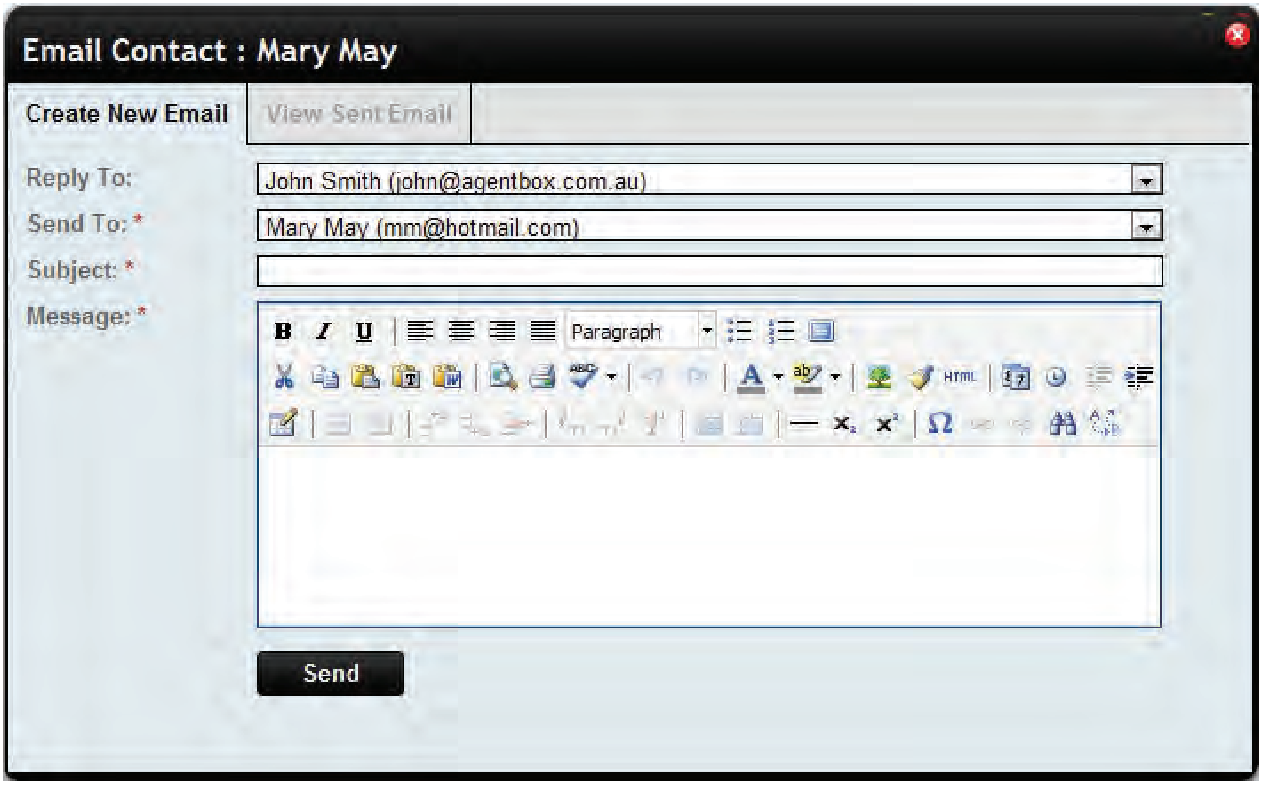
How do I send an email to a Contact in Agentbox?

1. Search for your Contact and open their Contact Card



2. Click on Send an Email action icon

3. Enter Subject and Message

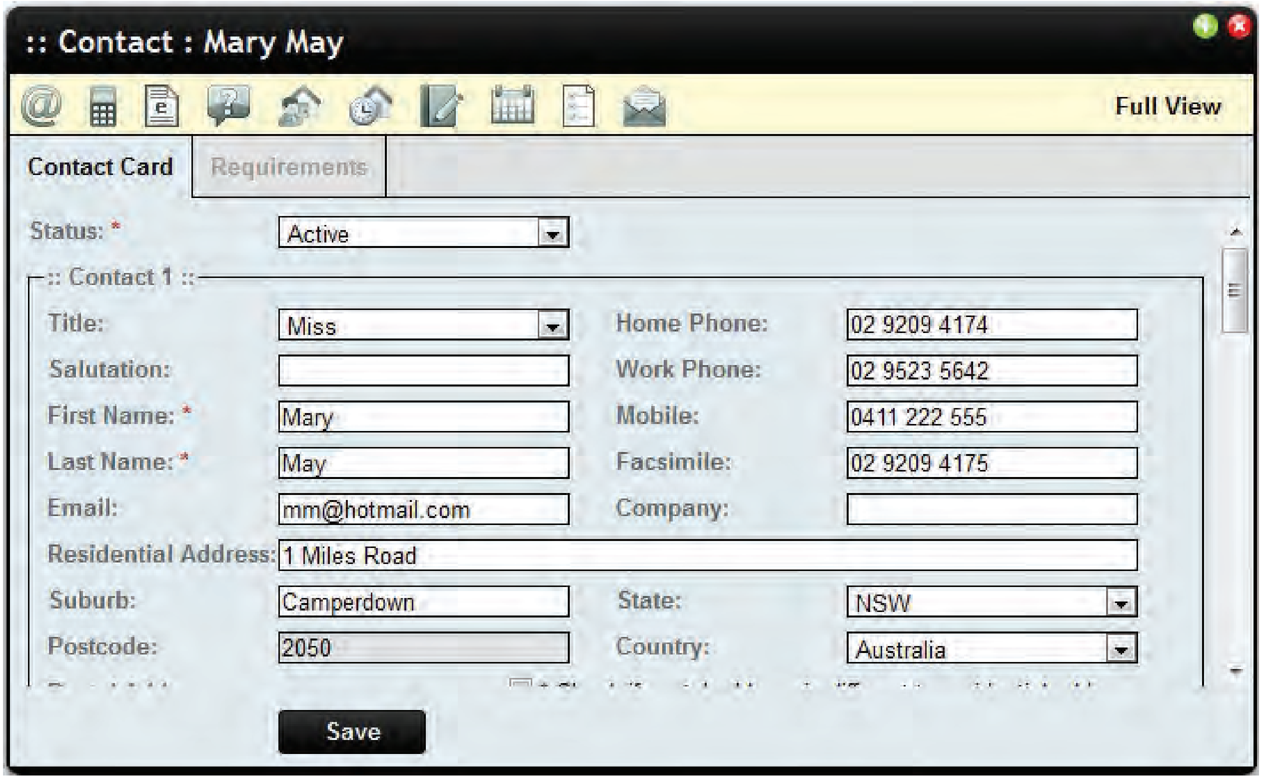


4. Click on Send

SMS Contact

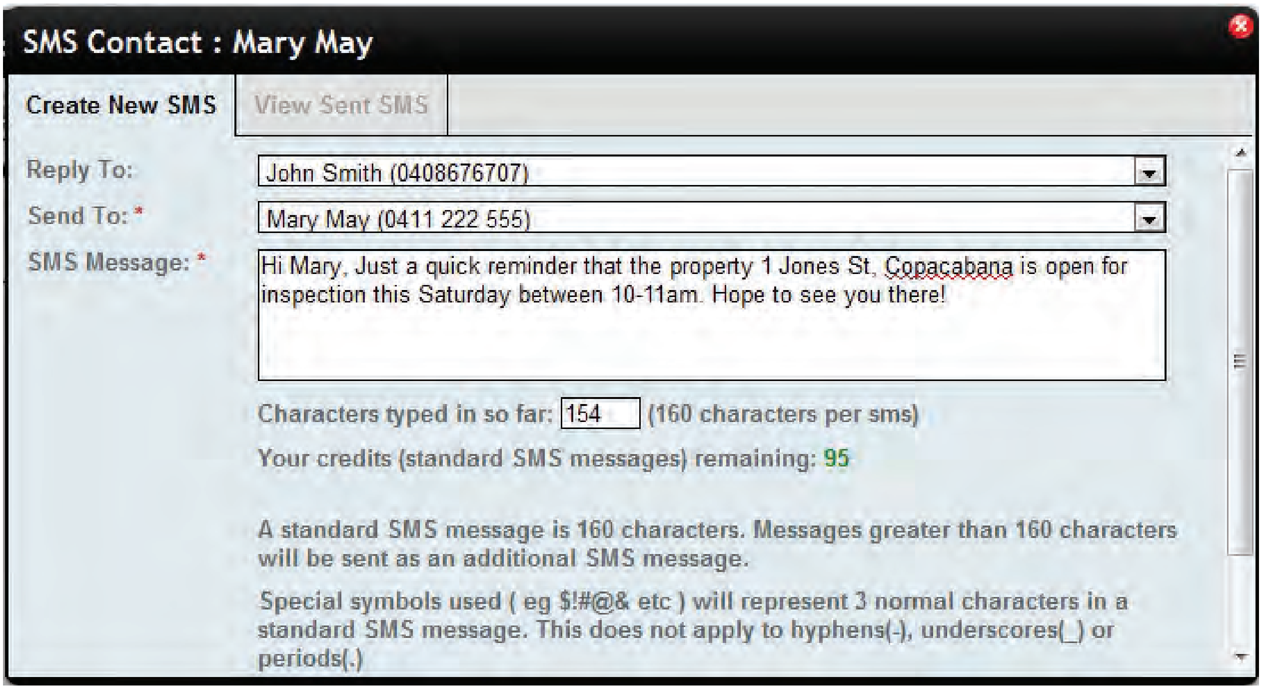
How do I send an SMS to a Contact in Agentbox?

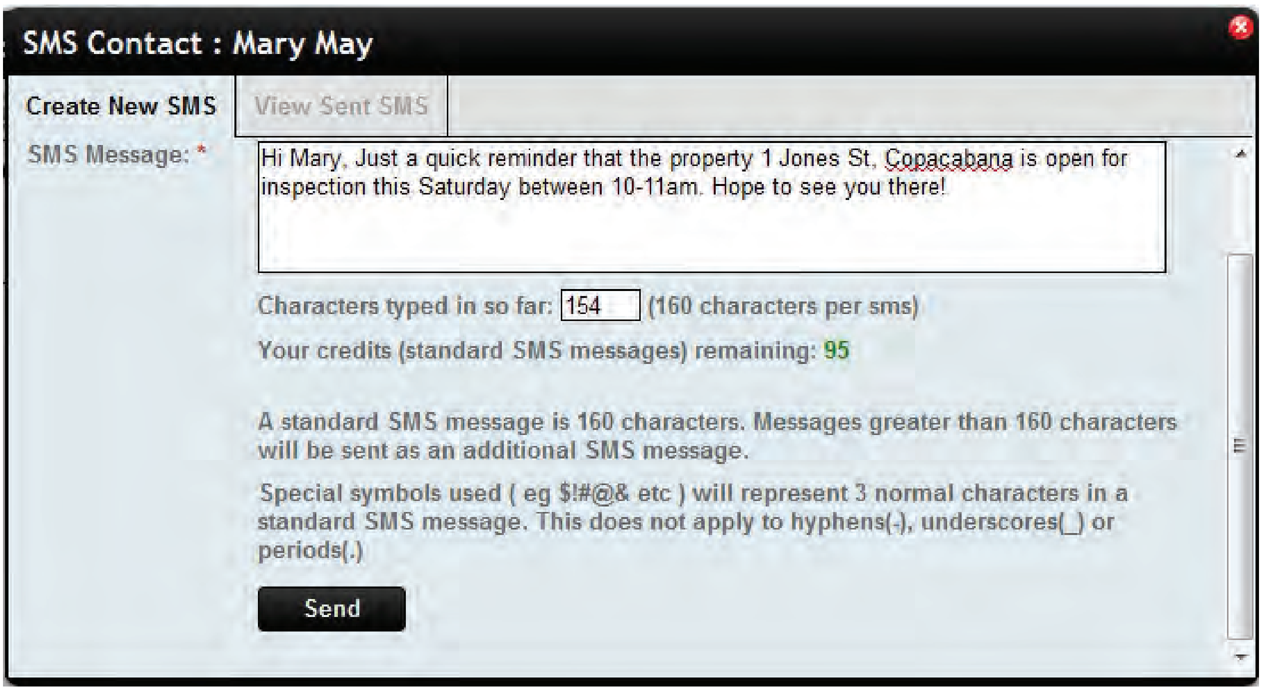
1. Search for your Contact and open their contact card



2. Click on the SMS icon

3. Enter SMS Message



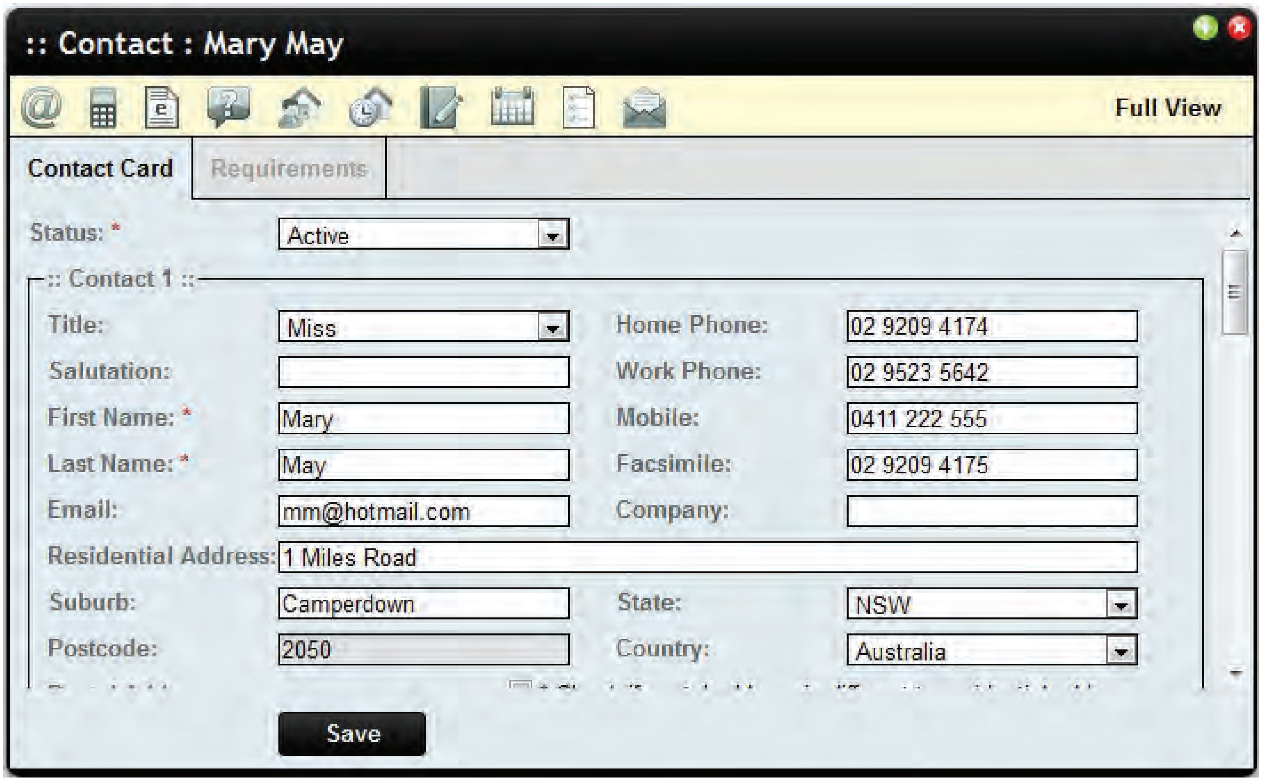


4. Click on Send

E-Newsletter

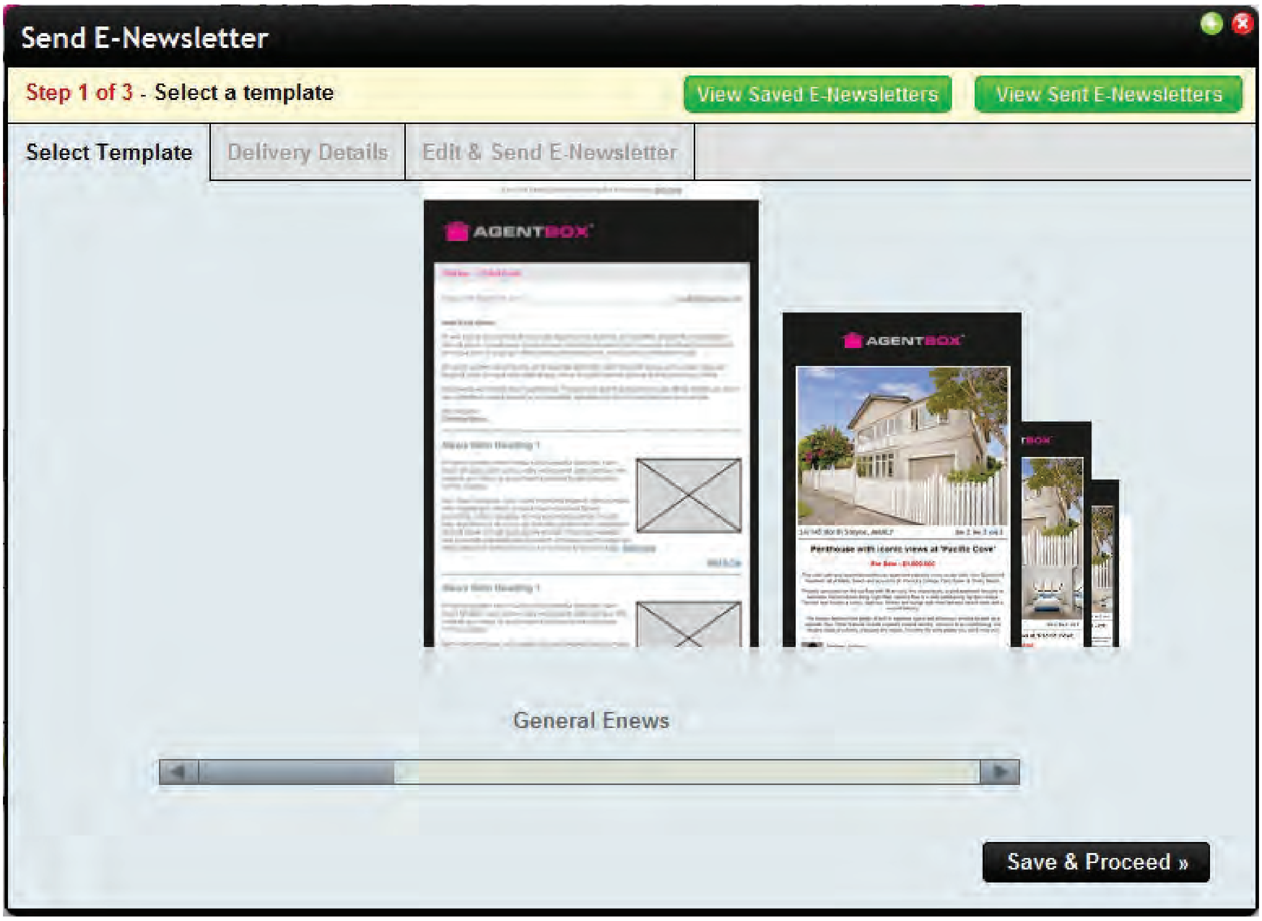
How do I send an E-Newsletter to a Contact?

1. Search for your Contact and open their Contact Card



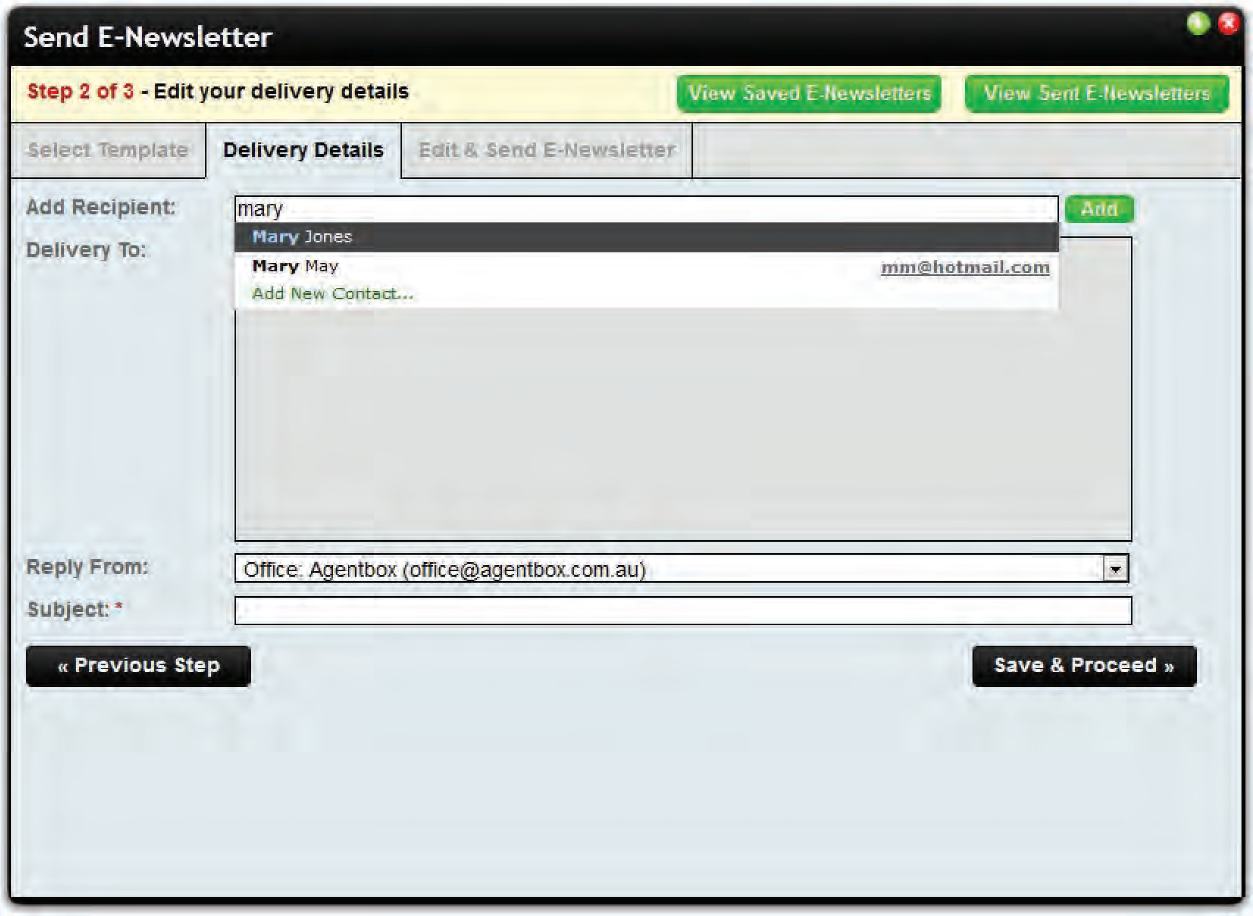
2. Click on the E-Newsletter Action icon 

3. Select a template

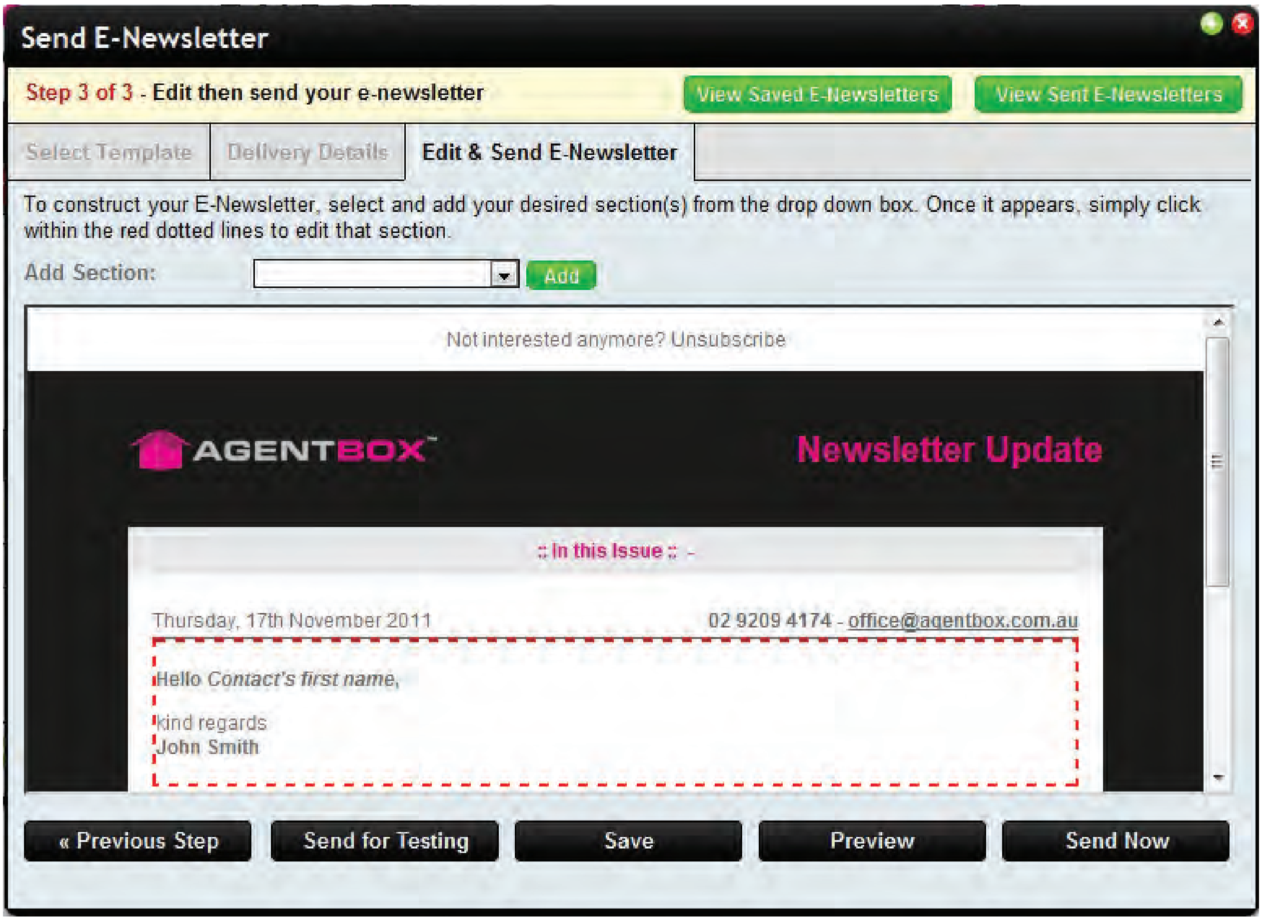


4. Add Recipient. *Note: you can only search and add additional contacts if it has an email address and is subscribed to receive 'Newsletters'.*

5. Enter the E-Newsletter Subject.



6. Create E-Newsletter



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

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

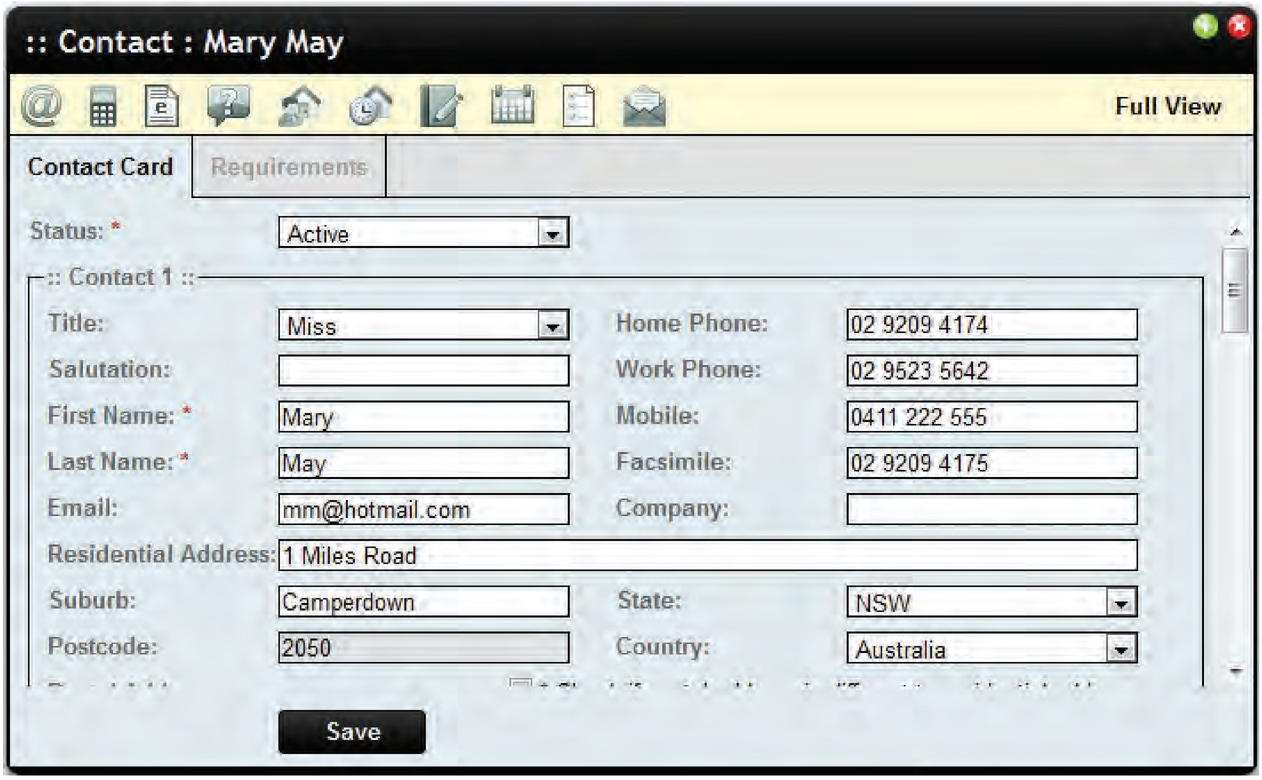
Log a Contact Enquiry

How do I Log an enquiry from a Contact in Agentbox?

The Log an Enquiry tool does the following:

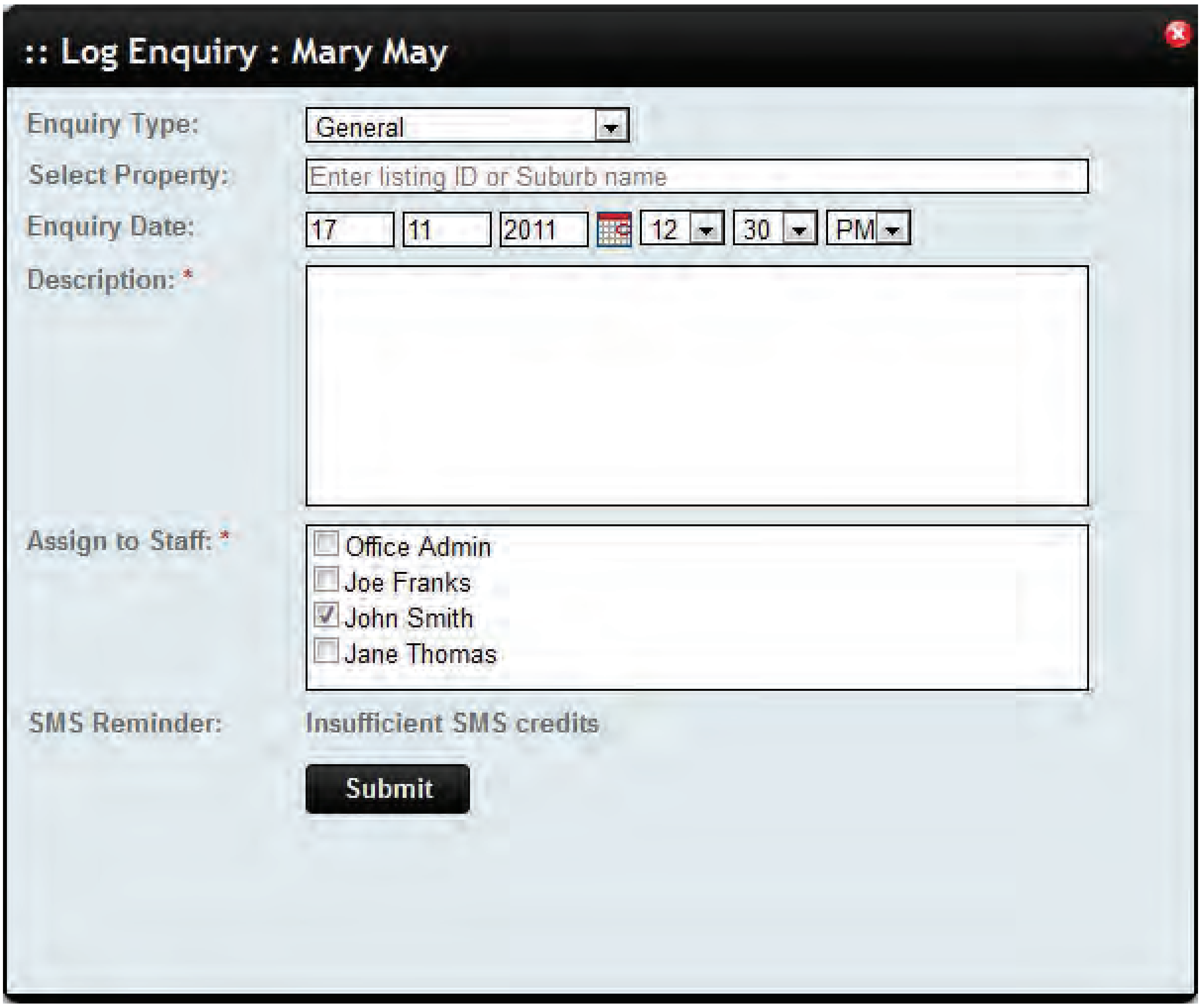
* Logs an enquiry against the Property's Recent Enquiries history
* Creates a task and sends an email to the assigned staff member to action
* Comments appear on the Vendor Report

1. [Search for your Contact](#) and open their [Contact Card](#)



2. Click on Log an Enquiry action icon 

3. Enter Enquiry Type, Select Property, Description of Enquiry and Assign Staff



4. Click on Submit

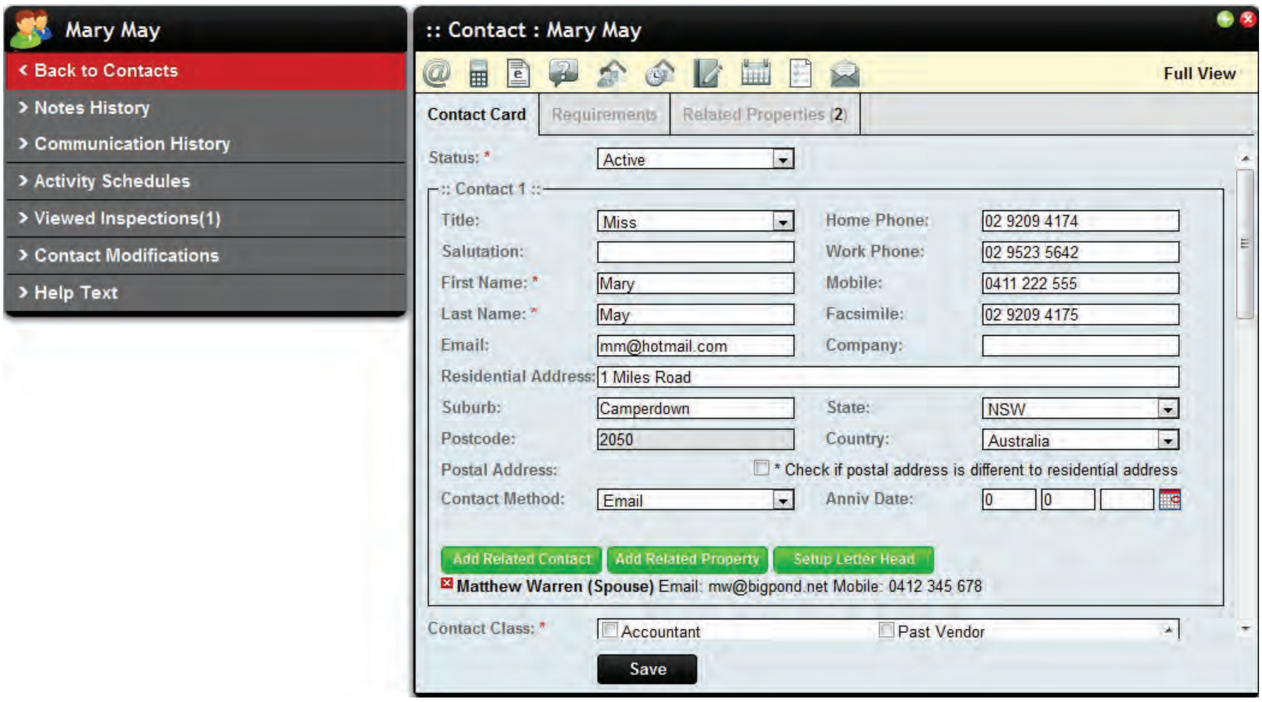
See also

[Communication History](#)

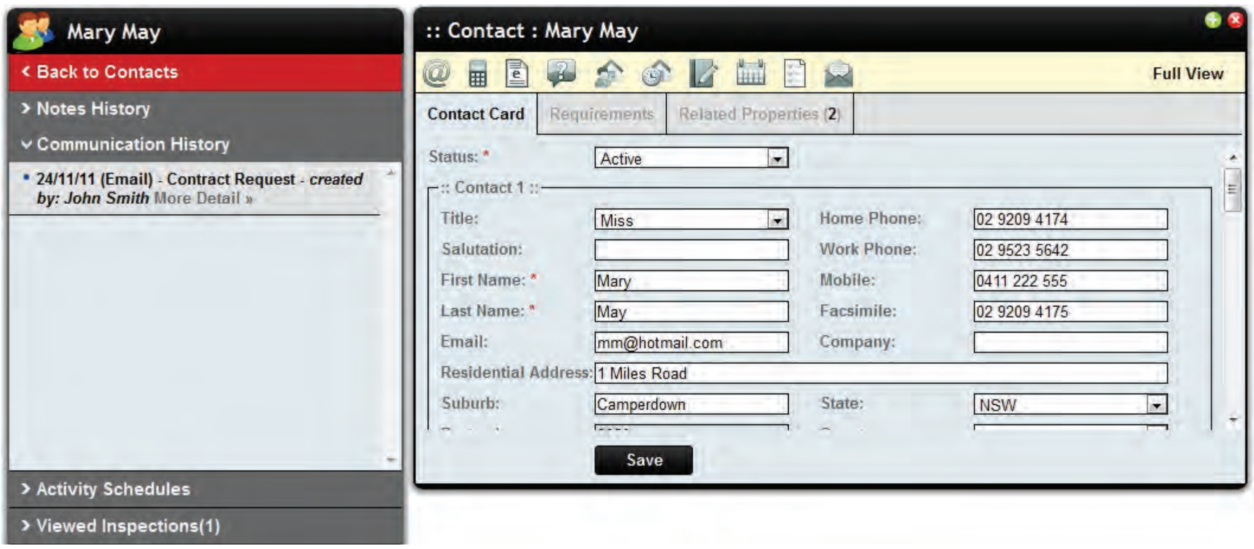
Communication History

View Communication History

1. Search for your Contact and open their Contact Card

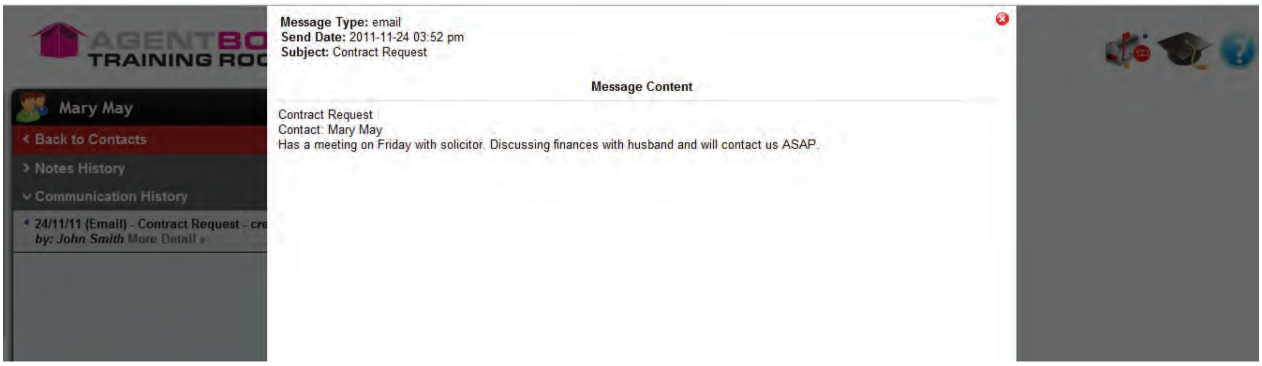


2. On the left panel click Communication History (If the matching left panel is not visible, click Full View in the top right hand corner of the contact card).



3. You will see a list of emails, e-newsletters and sms, and logged enquiries relating to the contact. Click More Detail to open the entry.

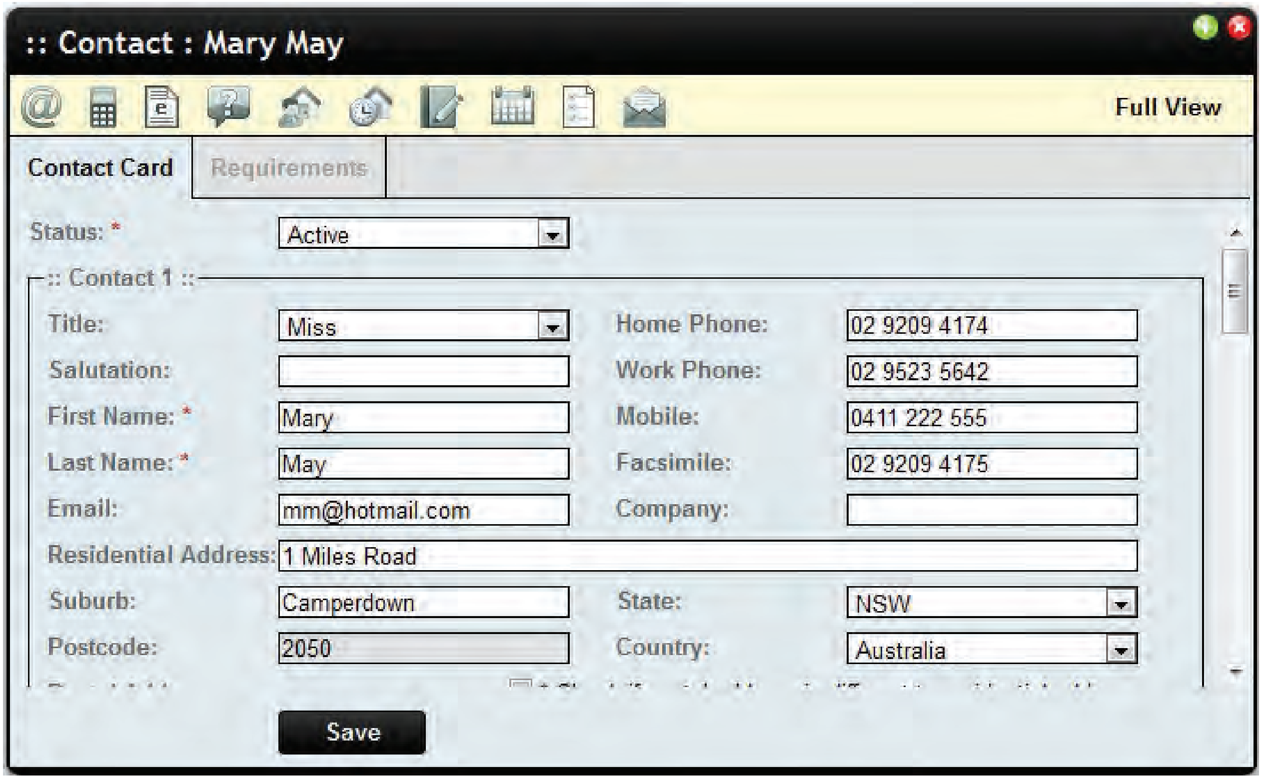
Message Type: - The method of sending the enquiry to the assigned agent
Send Date: The date of sending the enquiry to the assigned agent
Subject: The subject line of the message or the functionality in the system in this example this is the email sent to the agent from a logged contract request.



Inspections by Appointment

How do I log feedback from Inspections by Appointment?

1. Search for your Contact and open their Contact Card

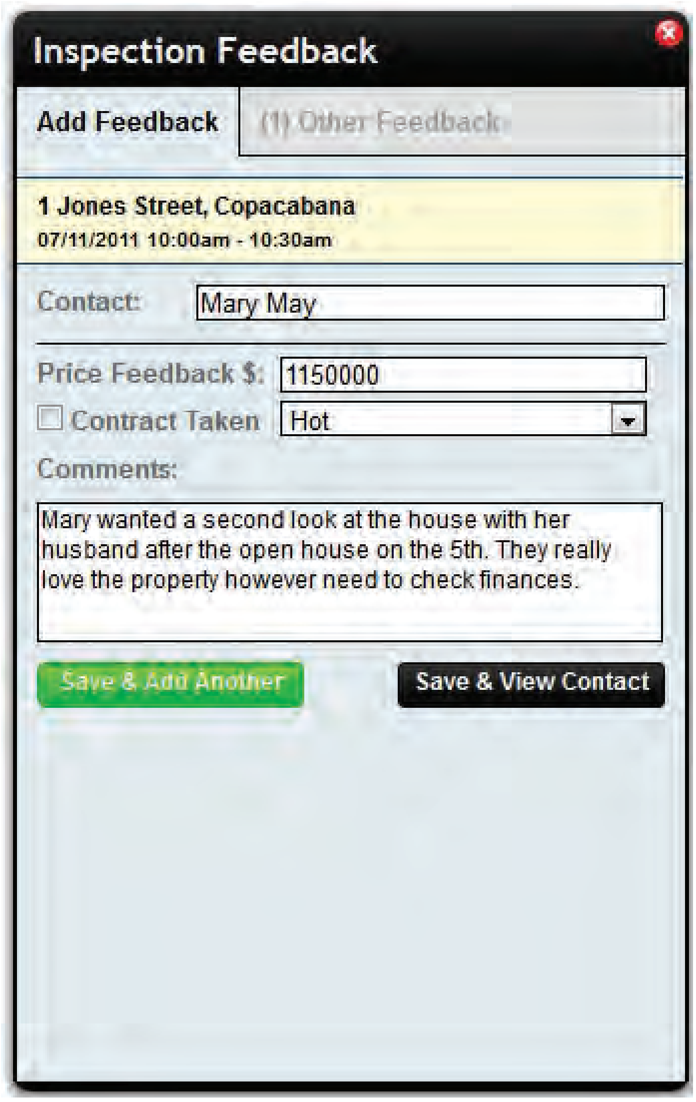


2. Click on the Add Feedback by Appointment action icon 

3. Enter the date and time of the inspection

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

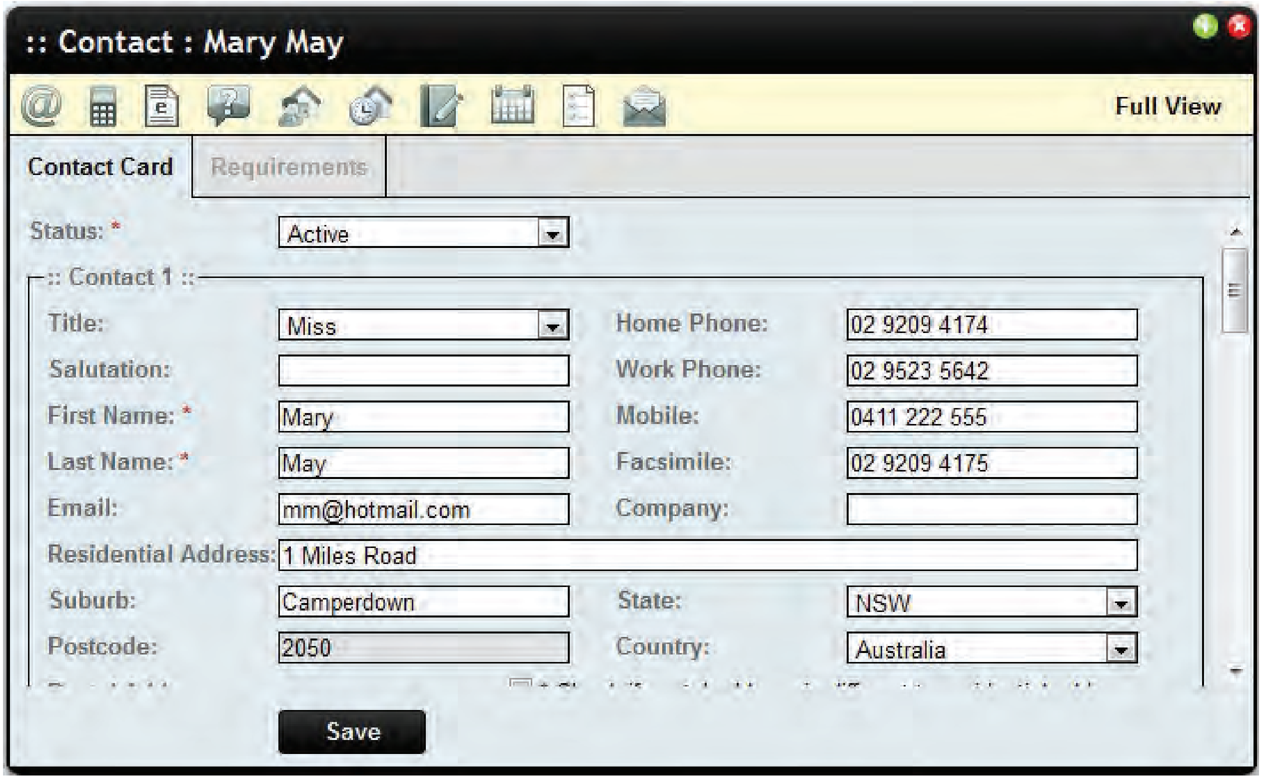


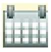
5. Once you have logged all appointments, close the right panel using the red cross.

Add a Meeting to a Contact

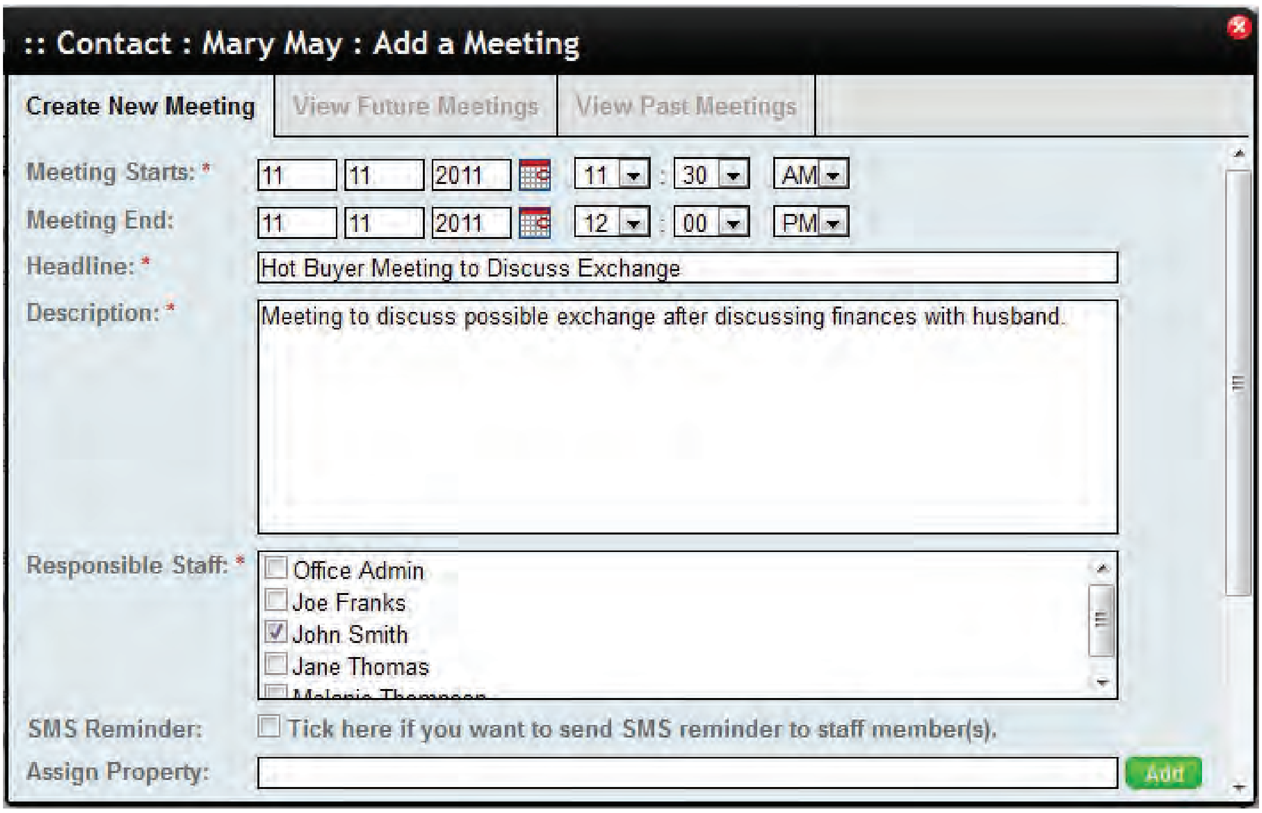
How do I Add a Meeting for a Contact in Agentbox?

1. Search for your Contact and open their Contact Card



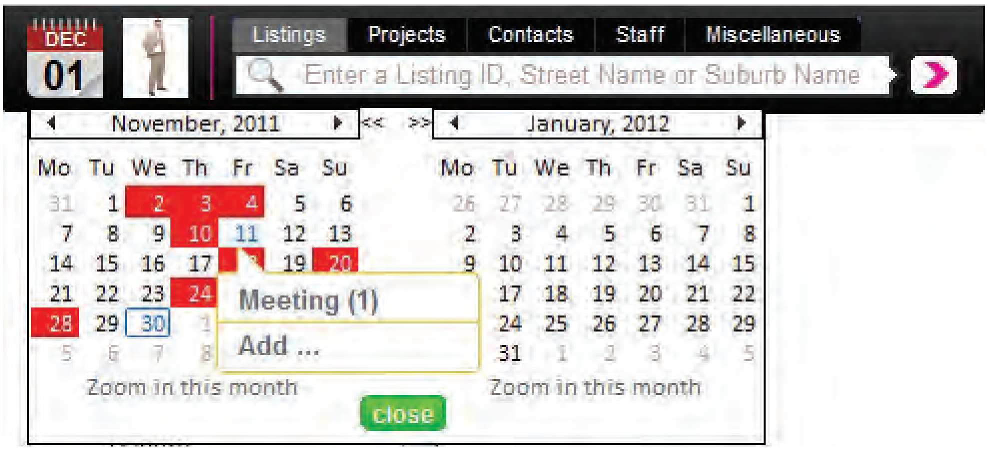
2. Click on Add a Meeting action icon 

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



4. Click on Save

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



Match Properties

How do I match Properties to a Contact in Agentbox?

There are two ways you can match Properties to a Contact in Agentbox:

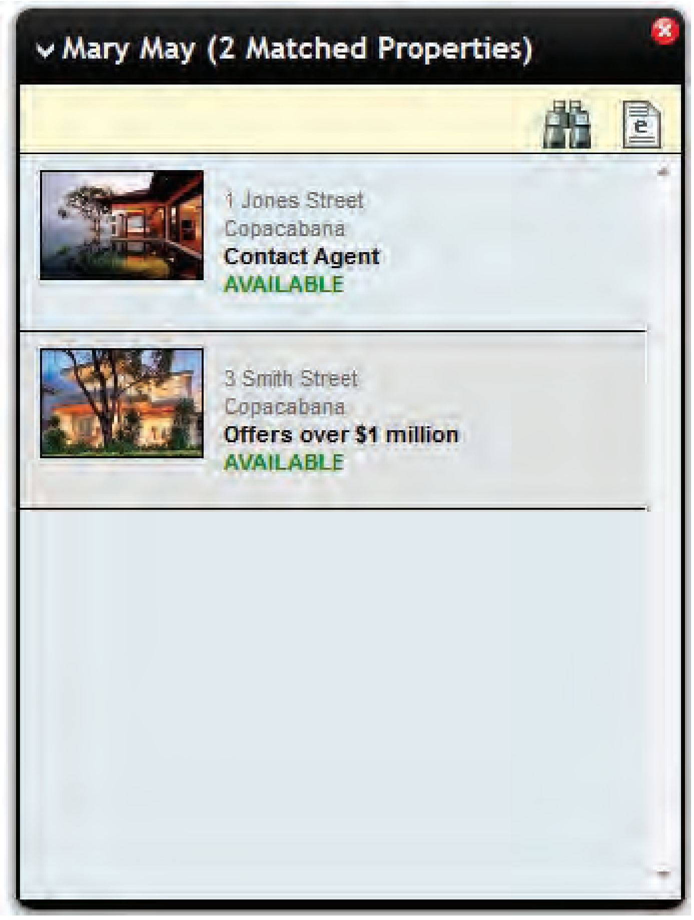
- Through a Contact card
- Through the Fast Finds Results Panel

Contact Card

1. Search for your Contact and open their Contact Card

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



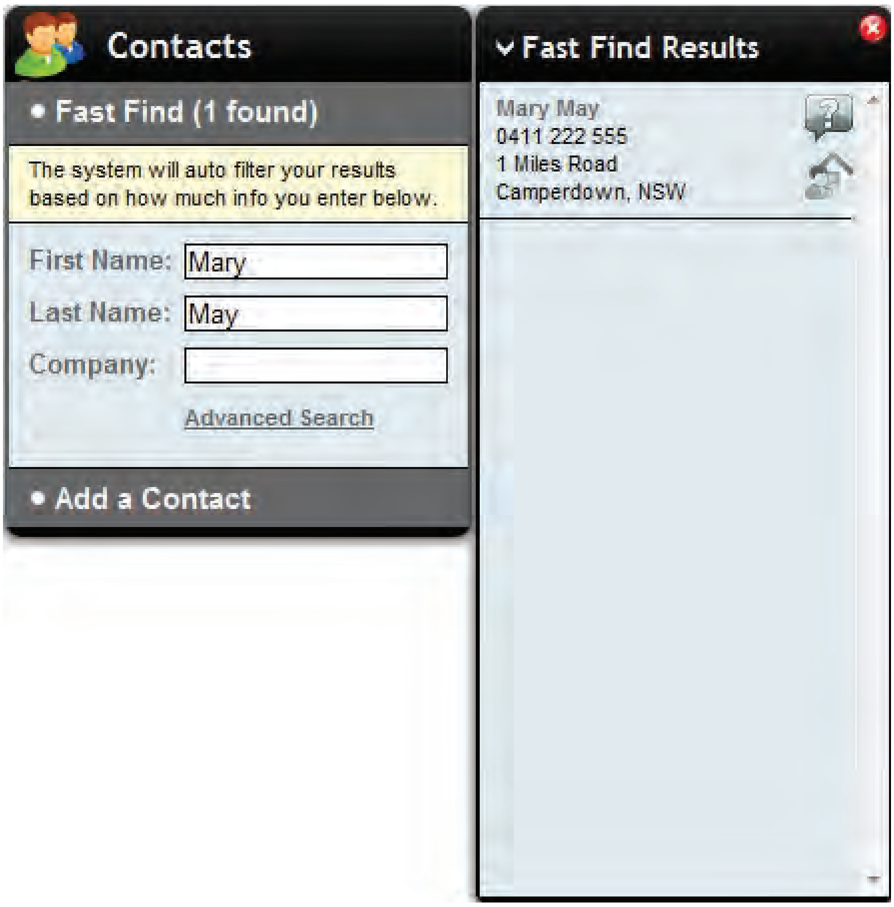
4.  You can preview the Property Alert email that will be sent to them that night containing their matched properties (if any) that have had a price change, status change or new listings matching their requirement. If the template does not load, the contact is not scheduled to receive any alerts that day.

Fast Finds Results Panel

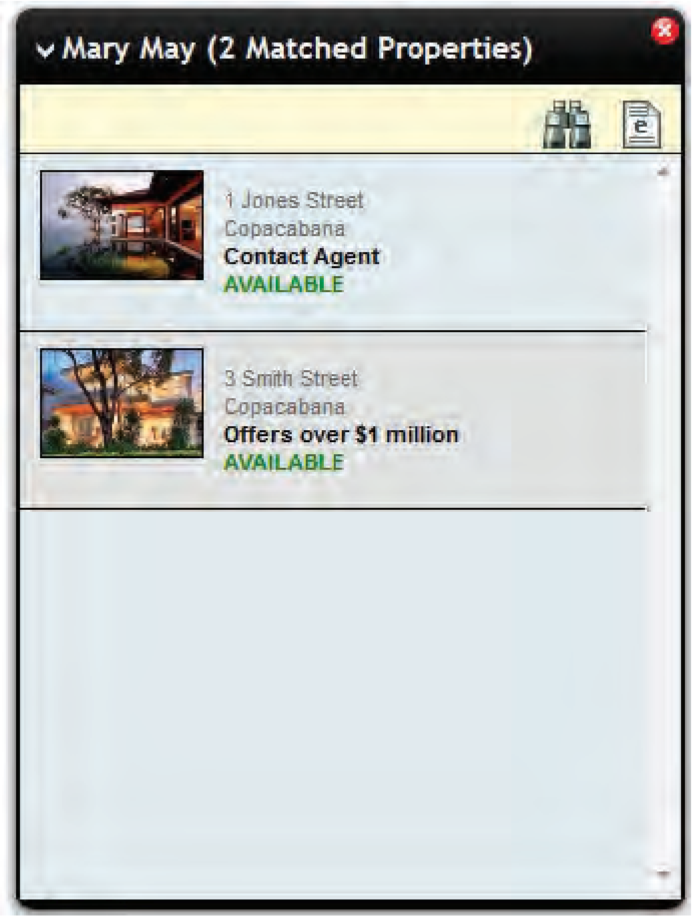
1. Click on Contacts from the main menu

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



4. A List of properties that match the contact's requirements will open in a panel in the right panel

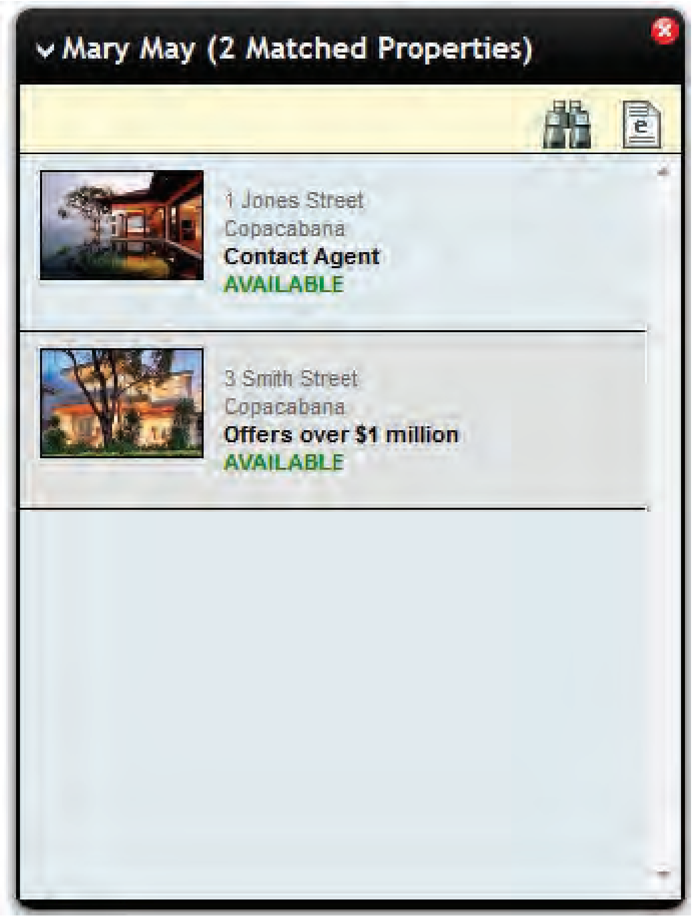


How do I send my Contact an E-Newsletter containing their matched Properties in Agentbox?

1. Follow the steps on How do I Match Properties to a Contact in Agentbox above.

2. Click on the Send E Newsletter action icon  and create an E-Newsletter using the General E-News template.

**Note: If subscribed to 'Property Updates', the contact will automatically receive their matched properties when they are first listed or have had a price change.*



**Note: If you click on the Preview action icon*  *you will be shown a preview of the automatic Property Update that will be sent to the contact that day. You will be only shown a preview if one or more of the contact's matched properties is new or has had a price change that day.*

AGENTBOX™ TRAINING ROOM

Edit my requirements | Visit our Web Site

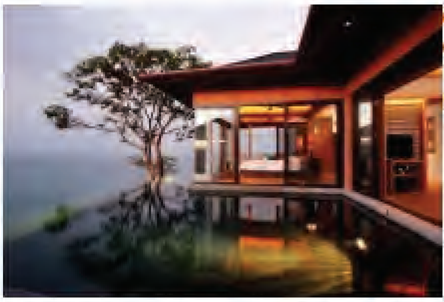
Property Alert

Thursday, 5th April 2012

Hello Mary,

The following listings matched your Property Alert search requirements.

Matched Listings



COPACABANA 1 Jones Street
Contact Agent

bed 3 | bath 4 | park 2

Luxury Balinese Inspired Residence

view property »

COPACABANA 3 Smith Street
Offers over $1 million

bed 3 | bath 2 | park 2

"Casa Belle" - An Iconic Luxury Beach Home

view property »

4 Cornwallis Street, Eveleigh NSW 2015
P: 02 9209 4174 | F: 02 9310 7232 | E: office@agentbox.com.au

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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?

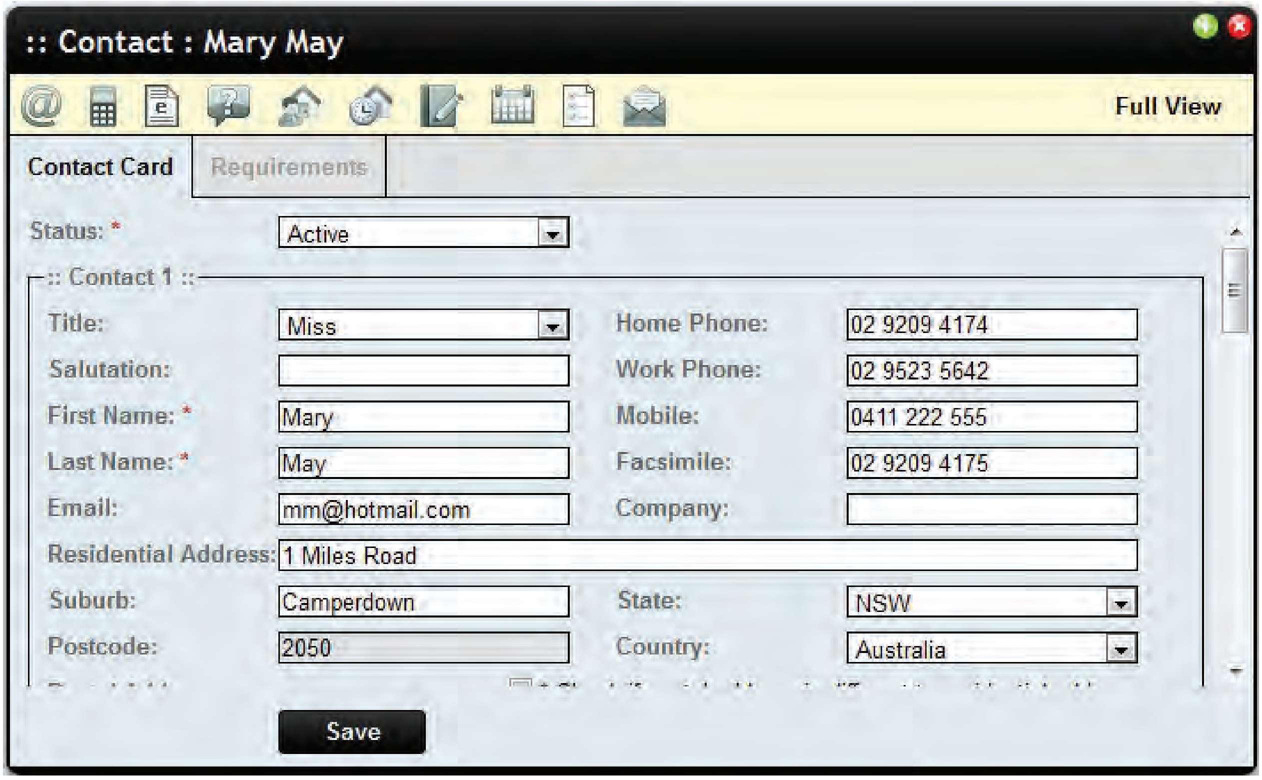
There are 3 ways to add a note entry against a contact in Agentbox:

- 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

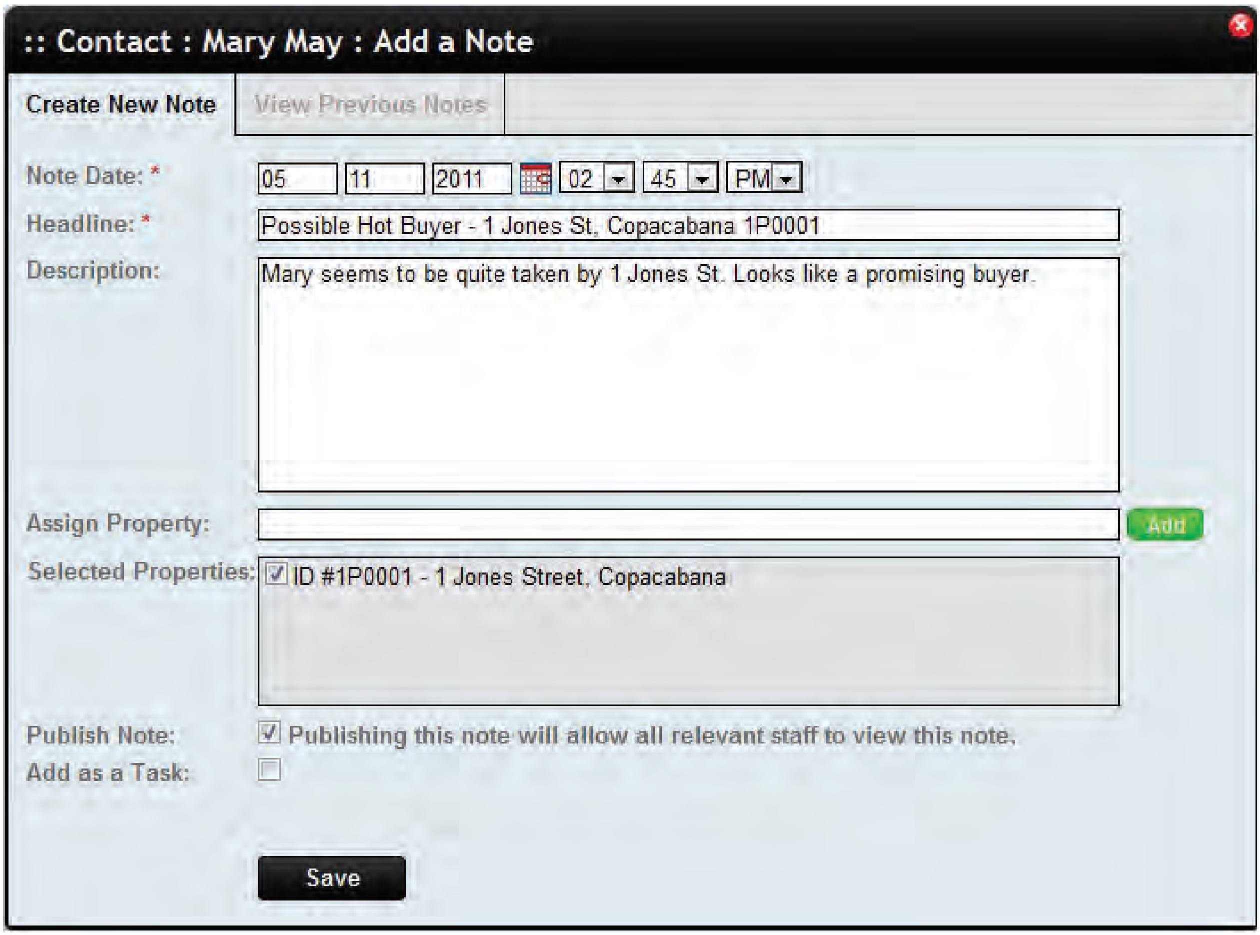
1. Search for your Contact and open their Contact Card



2. Click on Add a Note action icon 

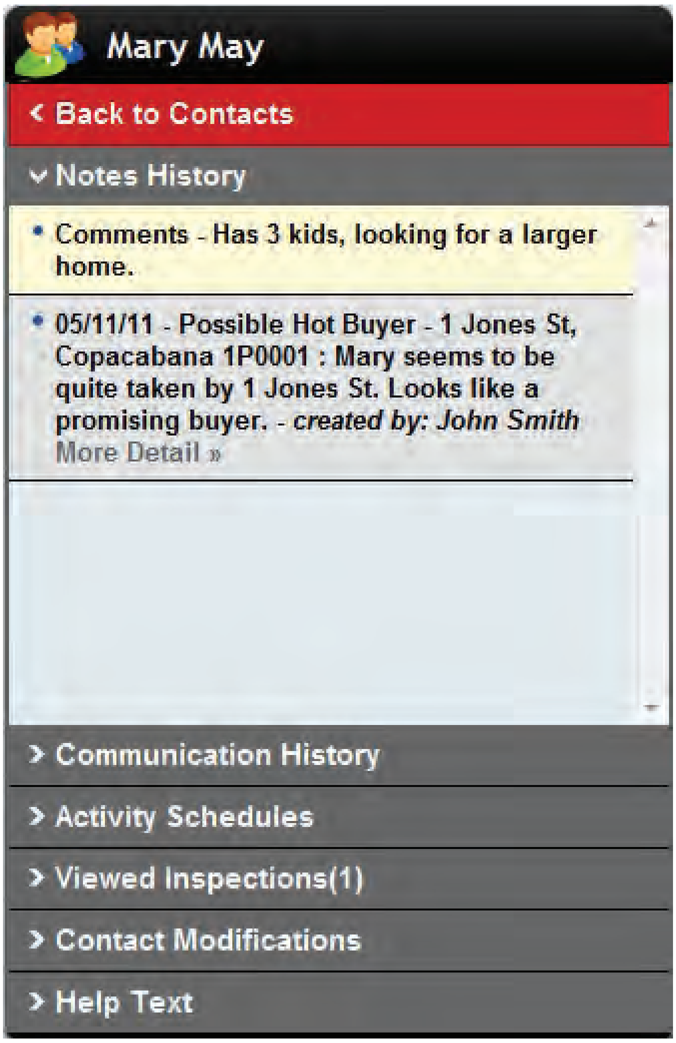
3. Enter a note Headline

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.



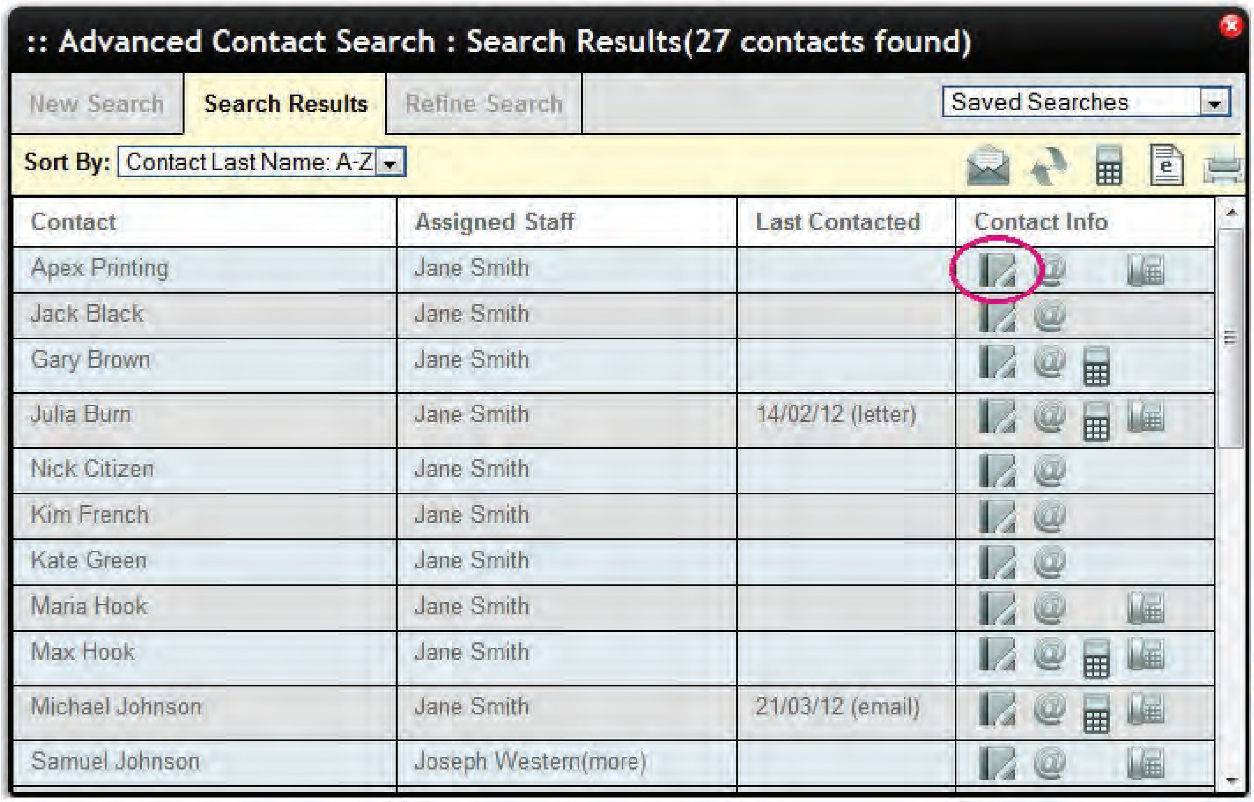
6. Click on Save

Your Notes will then appear in the left Contact panel for quick reference when accessing your Contact and also on your print lists etc.



Advanced Contact Search Results

1. Perform an [Advanced Contact Search]

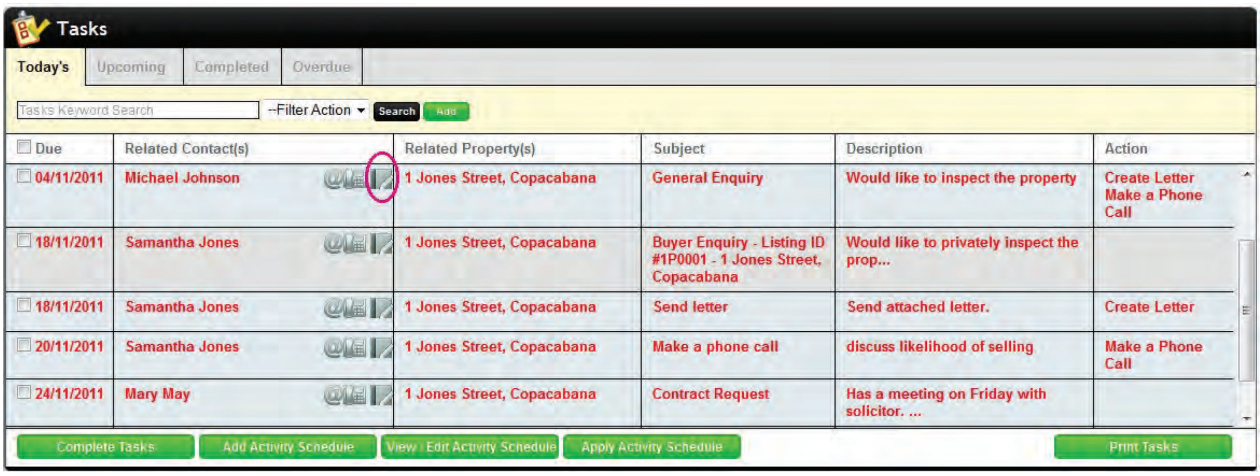


2. Click on the Add a Note action icon  next to the corresponding Contact.

Task Overview Panel

1. Click on Tasks from the Main Menu

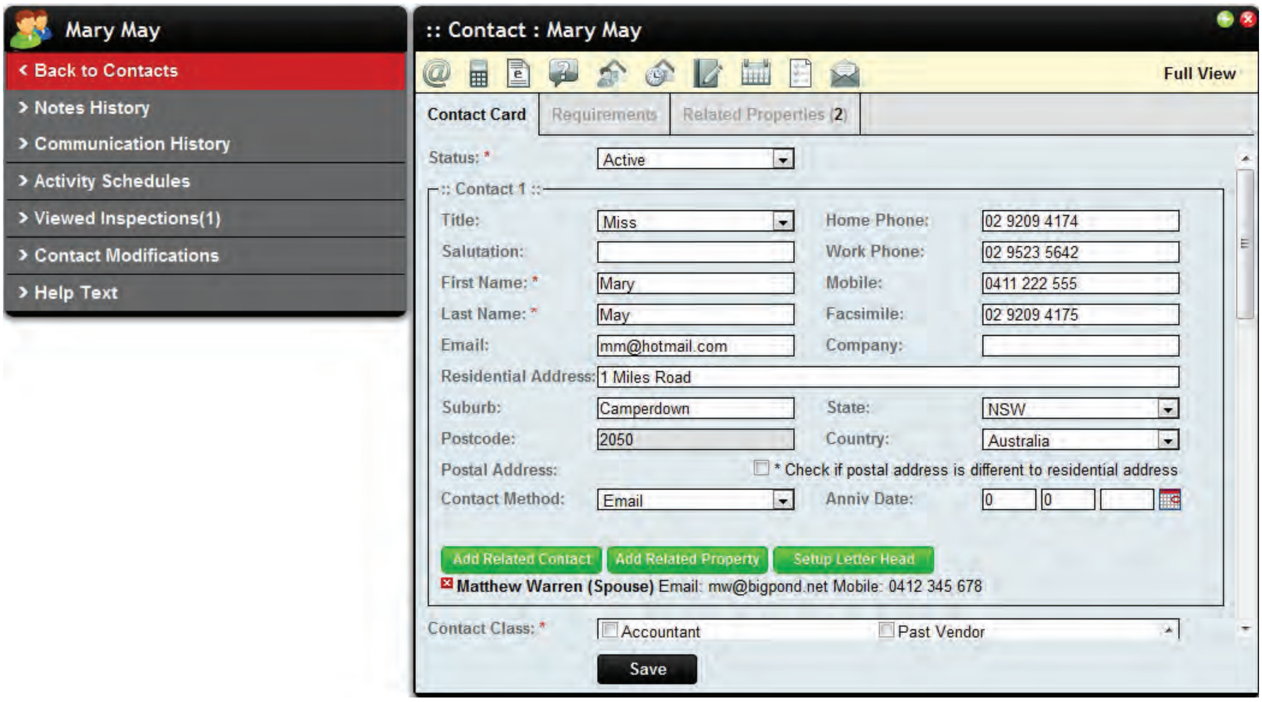
2. Click on the Add a Note action icon  next to the corresponding Contact.



View Contact Notes History

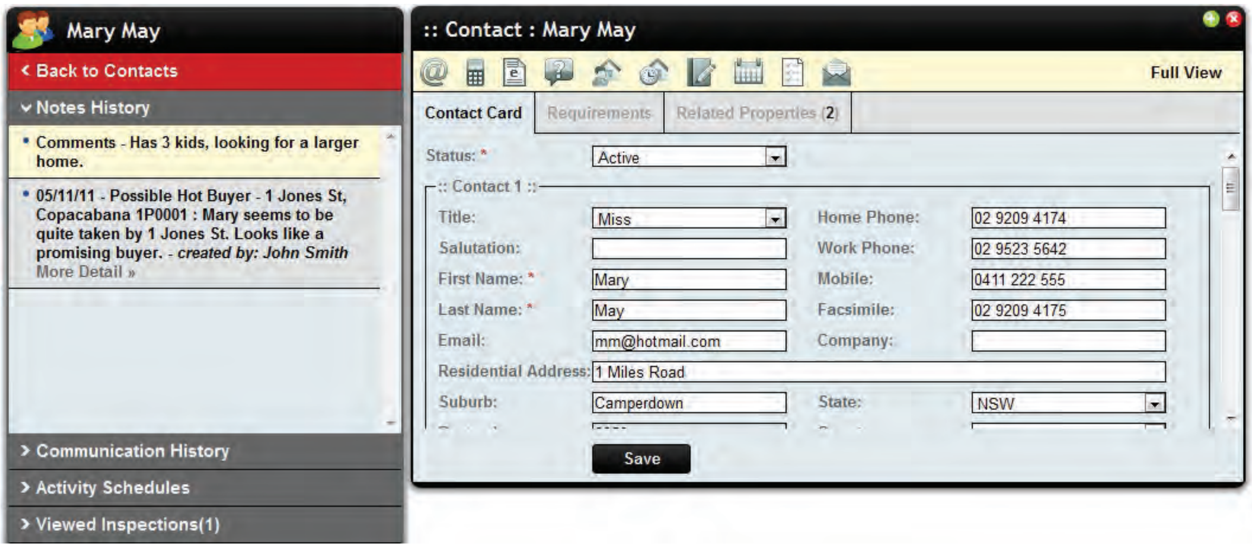
View Contact Notes History

1. Search for your Contact and open their Contact Card

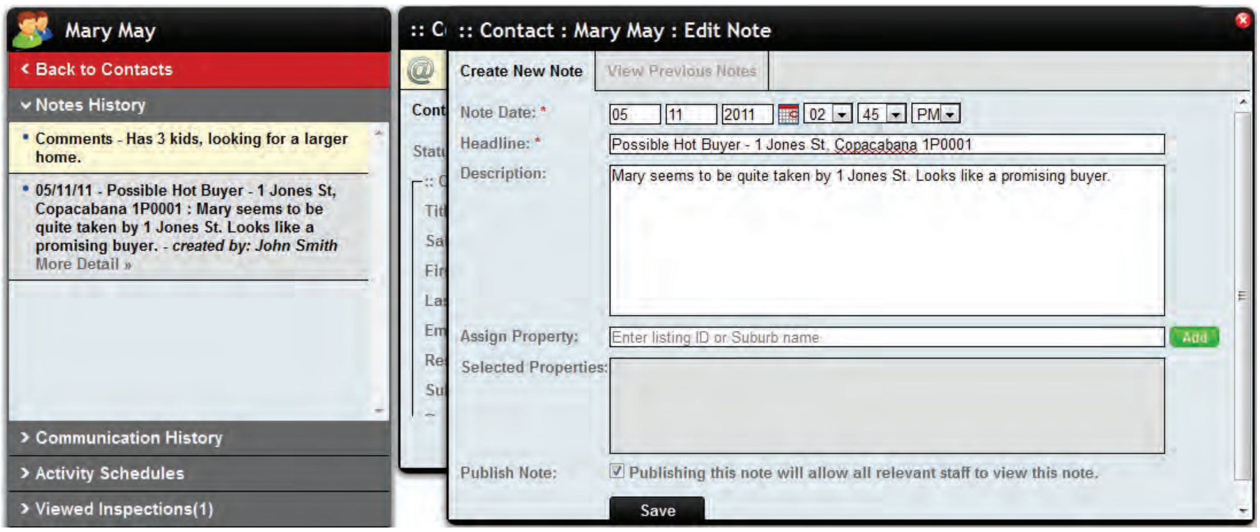


2. On the left panel click Notes History (If the matching left panel is not visible, click Full View in the top right hand corner of the contact card).

3. You will see a list of notes against the contact, the contact comments entered on the Contact Card will always appear first followed by the most recent notes logged using the Add Note action Icon.



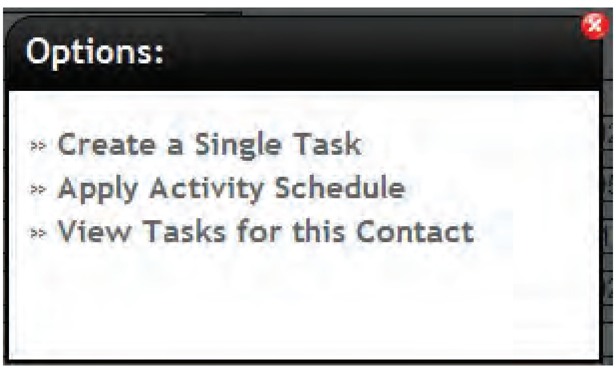
4. You can view the note by clicking More Detail.



Tasks & Activity Schedules

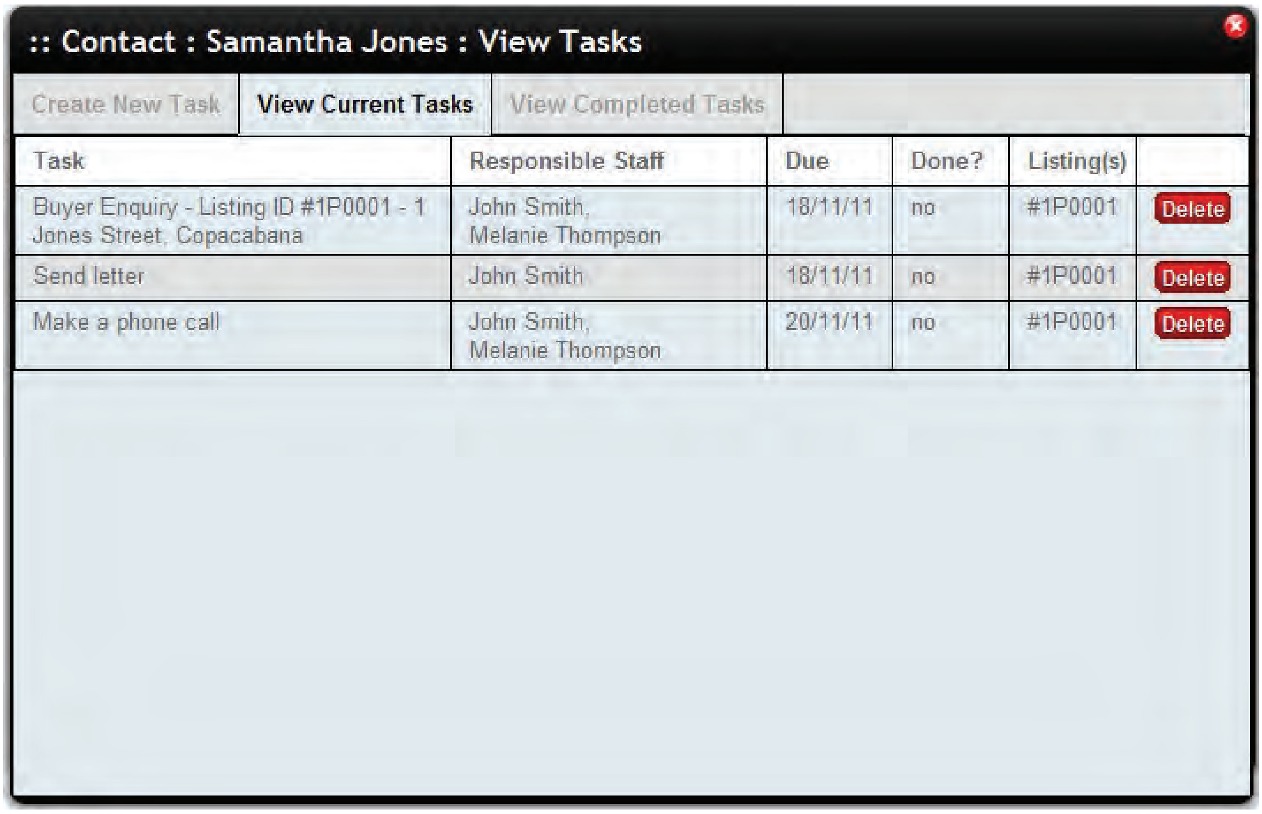
How do I add a task against a Contact?

1. Search for your Contact and open their Contact Card
2. Click on the Add a Task icon 



3. Select [Create a Single Task]
[Apply Activity Schedule]
View Tasks for this Contact

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

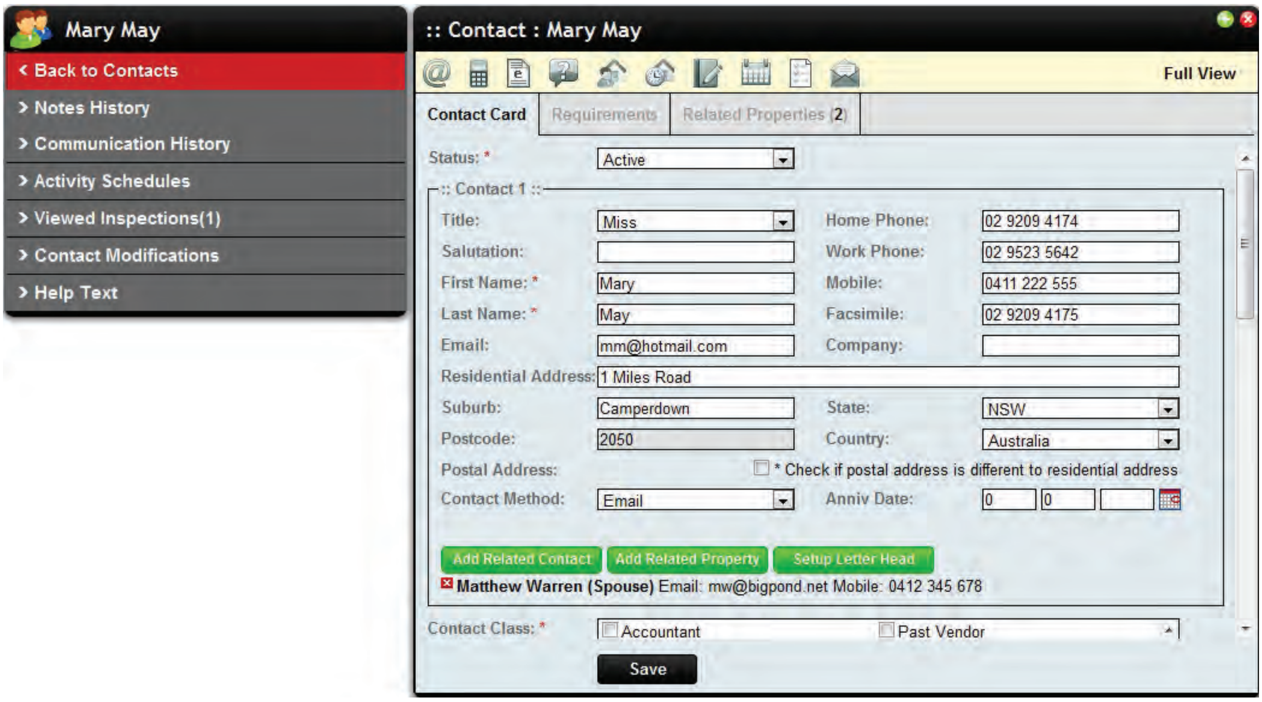


You may also be interested in:
[How to edit a task]
[How to attach a file to a task]
[How to complete a task]

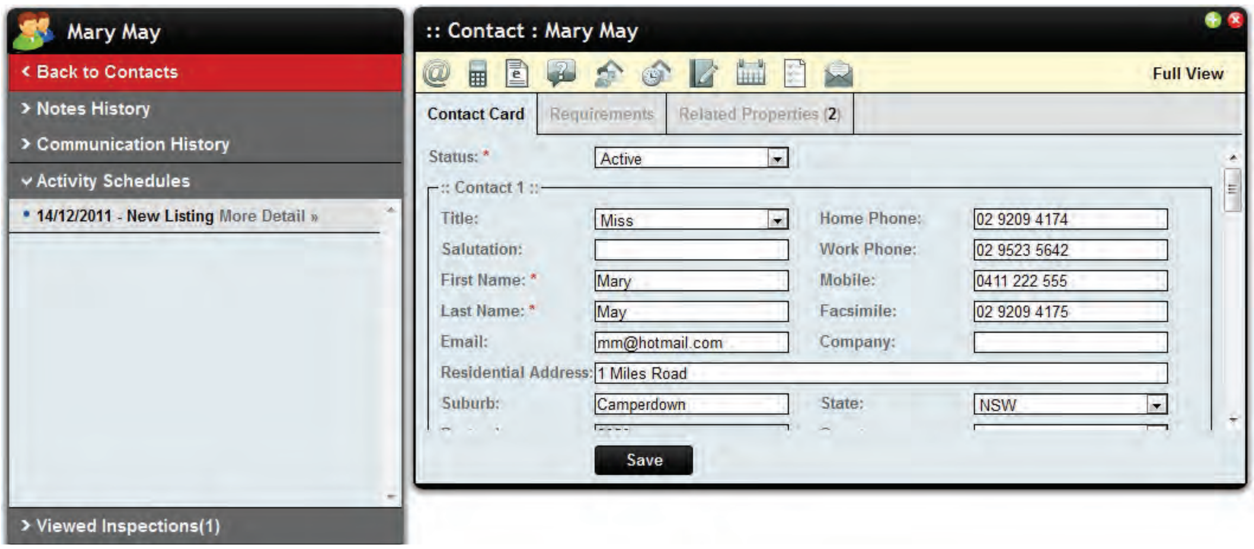
View Applied Activity Schedules

How do I view Applied Activity Schedules to a contact?

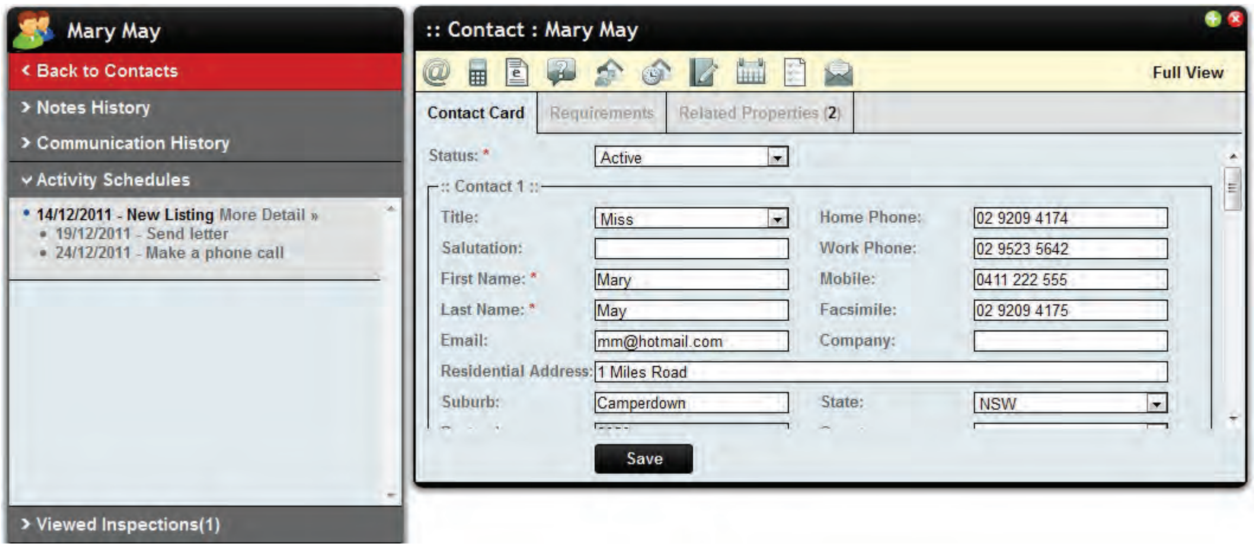
1. [Search for your Contact] and open their [Contact Card]



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



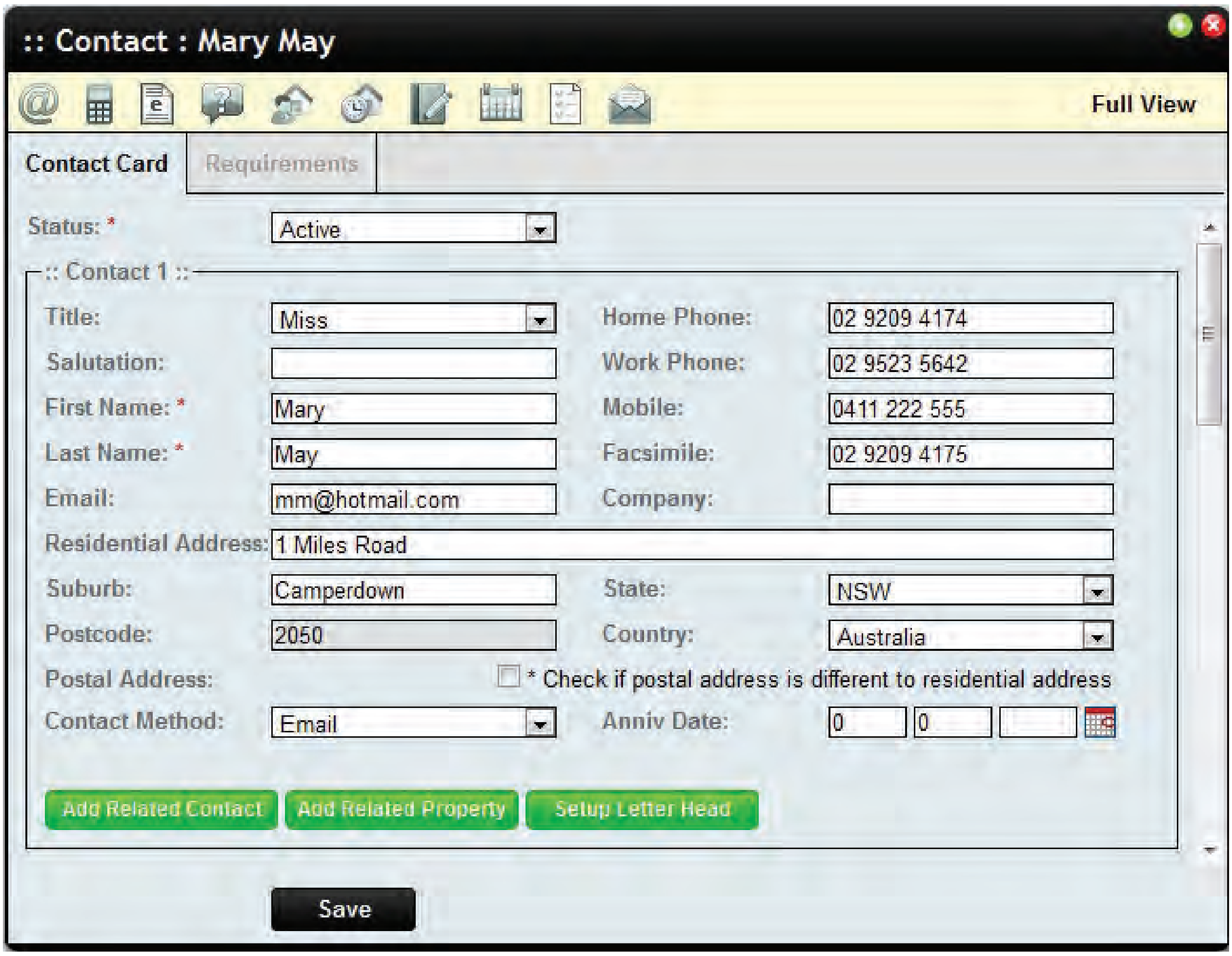
3. You will see a list of Activity Schedules that have been applied to the property. Click More Detail, to view the tasks relating to the schedule.



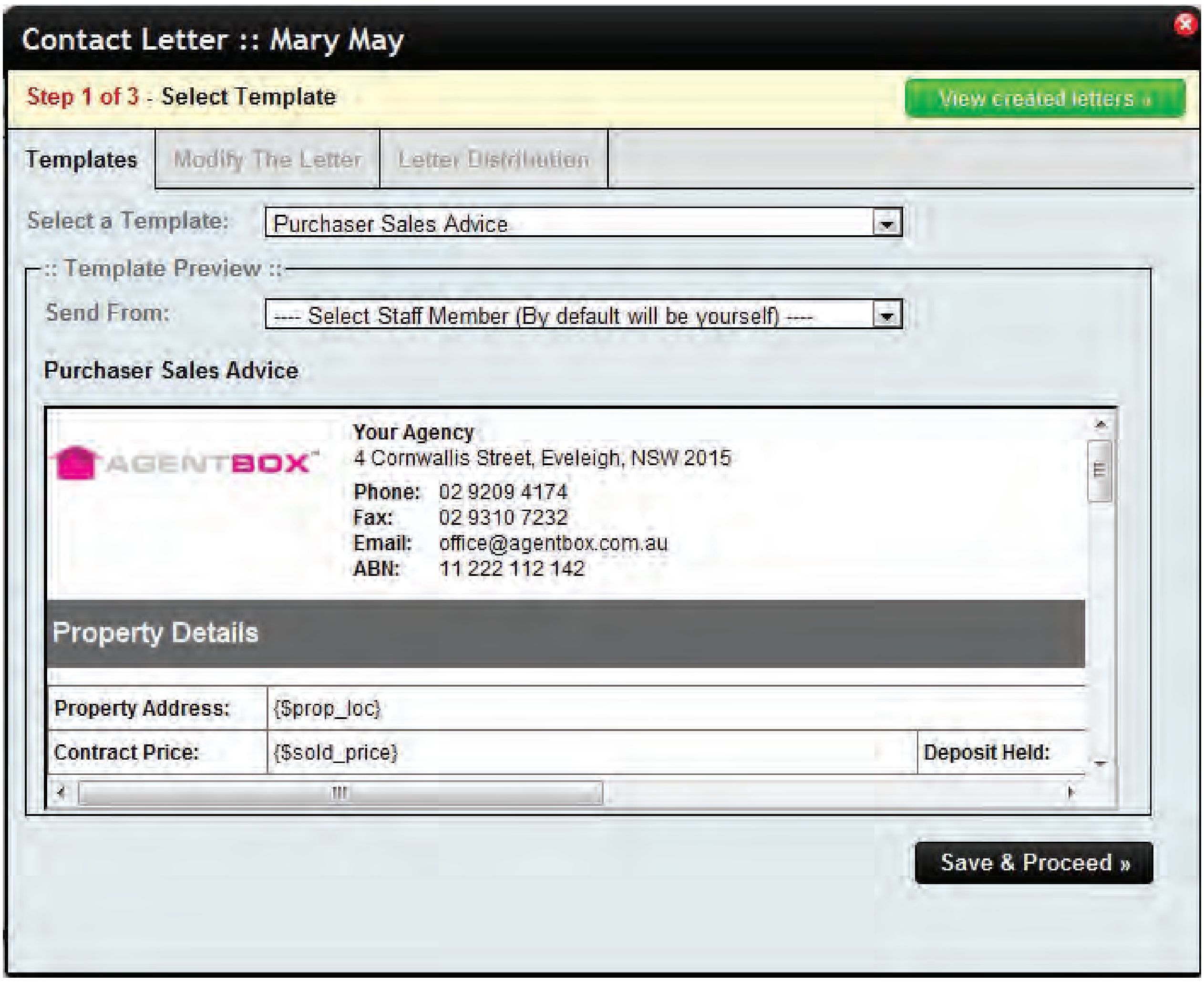
Send a Letter to a Contact

How do I Create a Letter for a Contact in Agentbox?

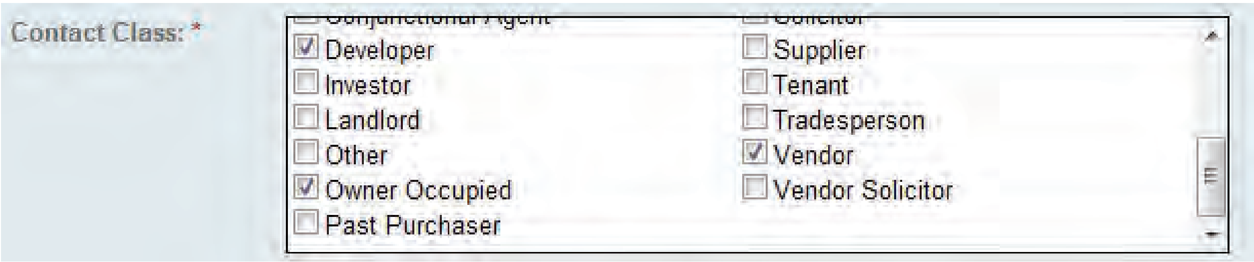
1. Search for your Contact and open their Contact Card

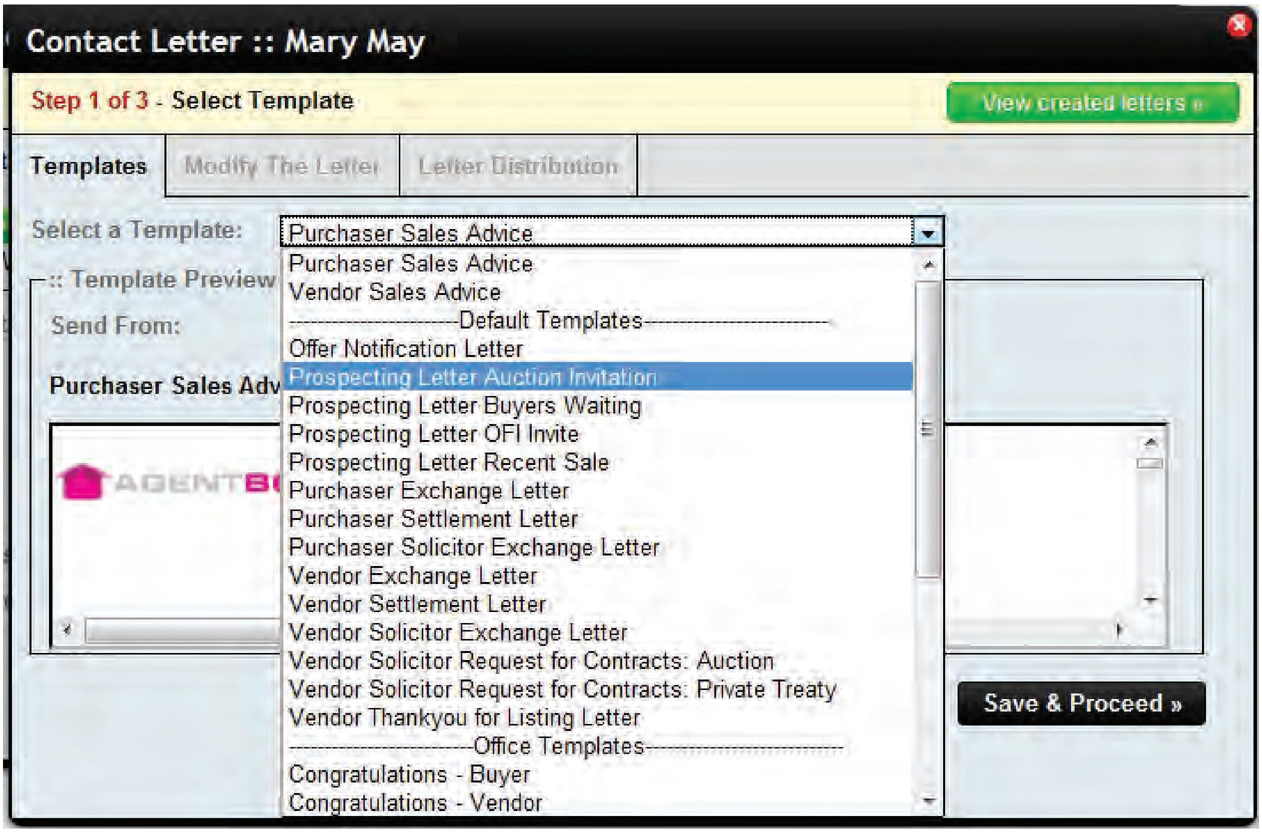


2. Click on Create A Letter action icon 



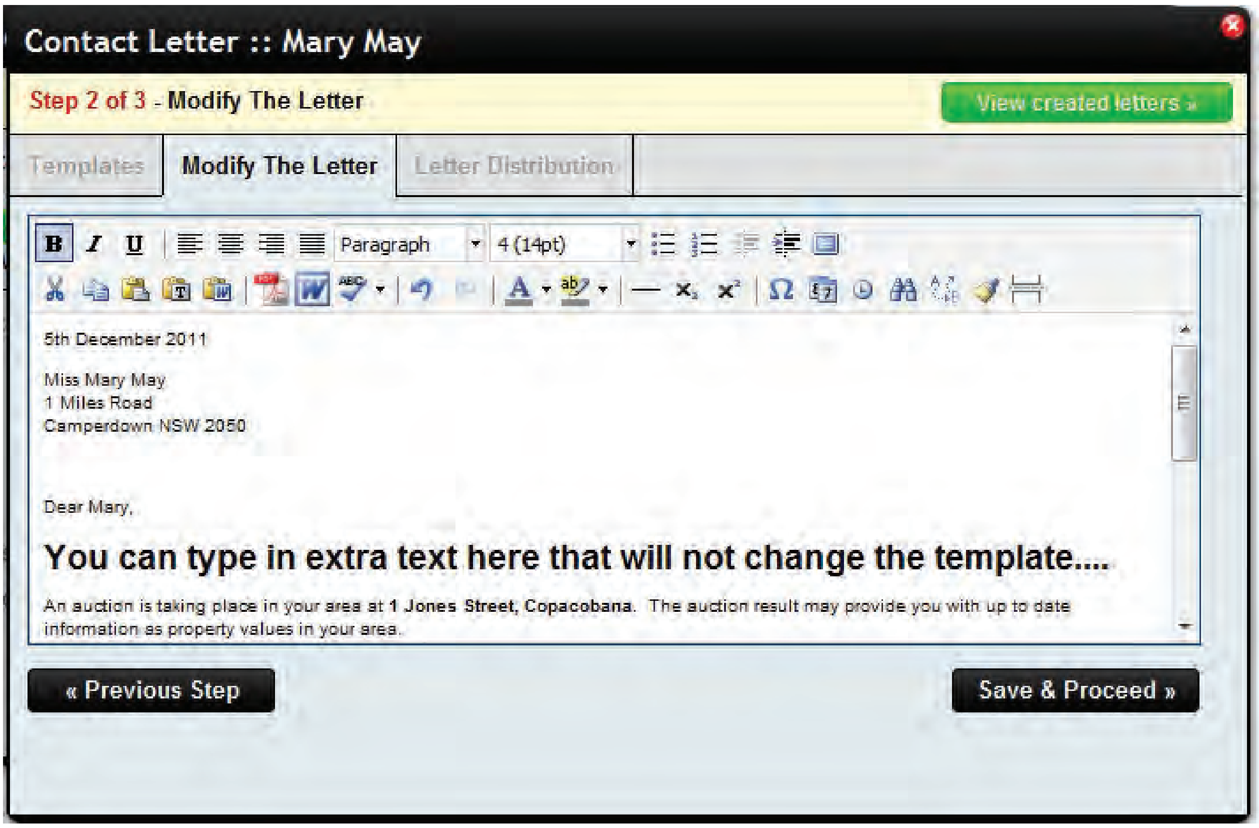
3. Click on Select a Template Drop Down and select a Letter Template - In this example we are using the Prospecting Letter Auction Invitation. (This template uses the owner occupied merge fields so the contact needs the contact class Owner Occupied ticked).





4. Click on Save & Proceed

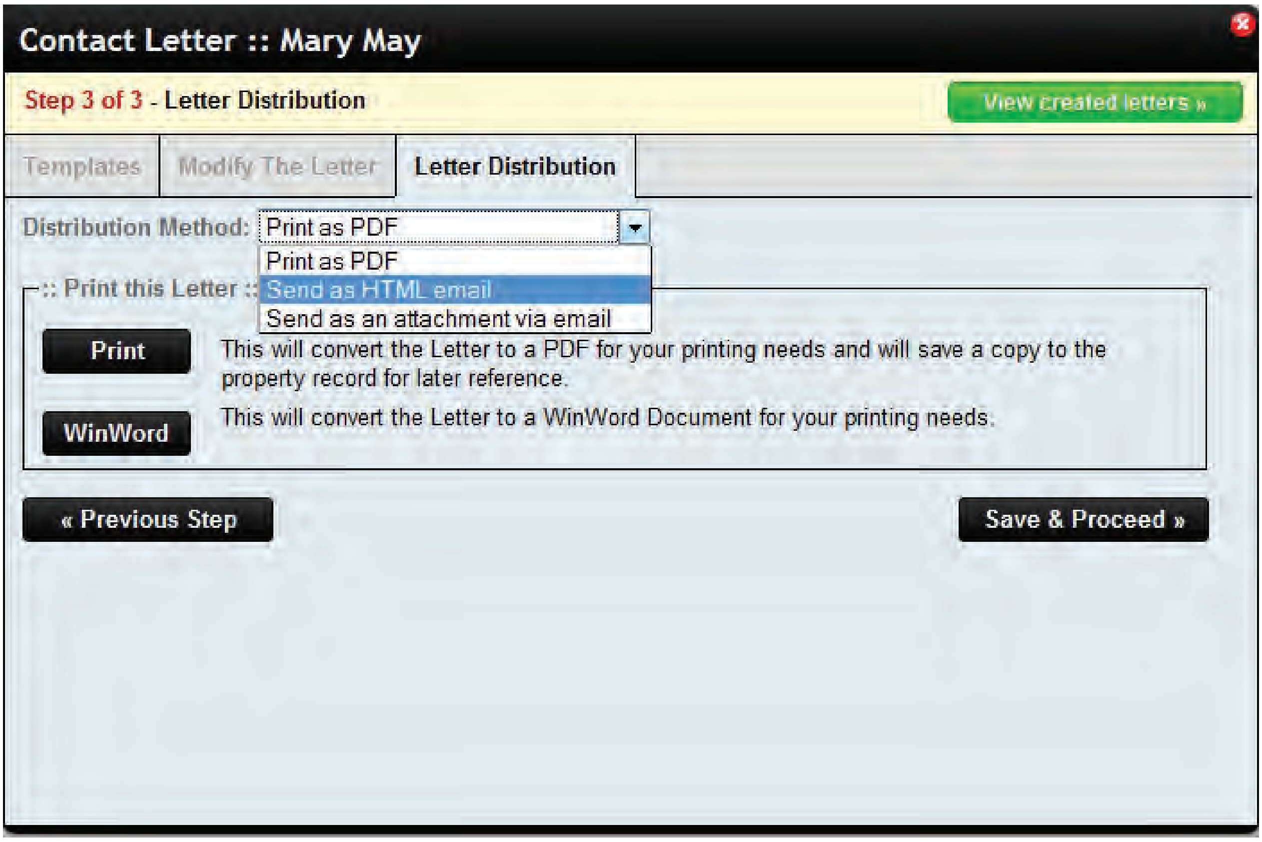
5. Modify the Letter if necessary



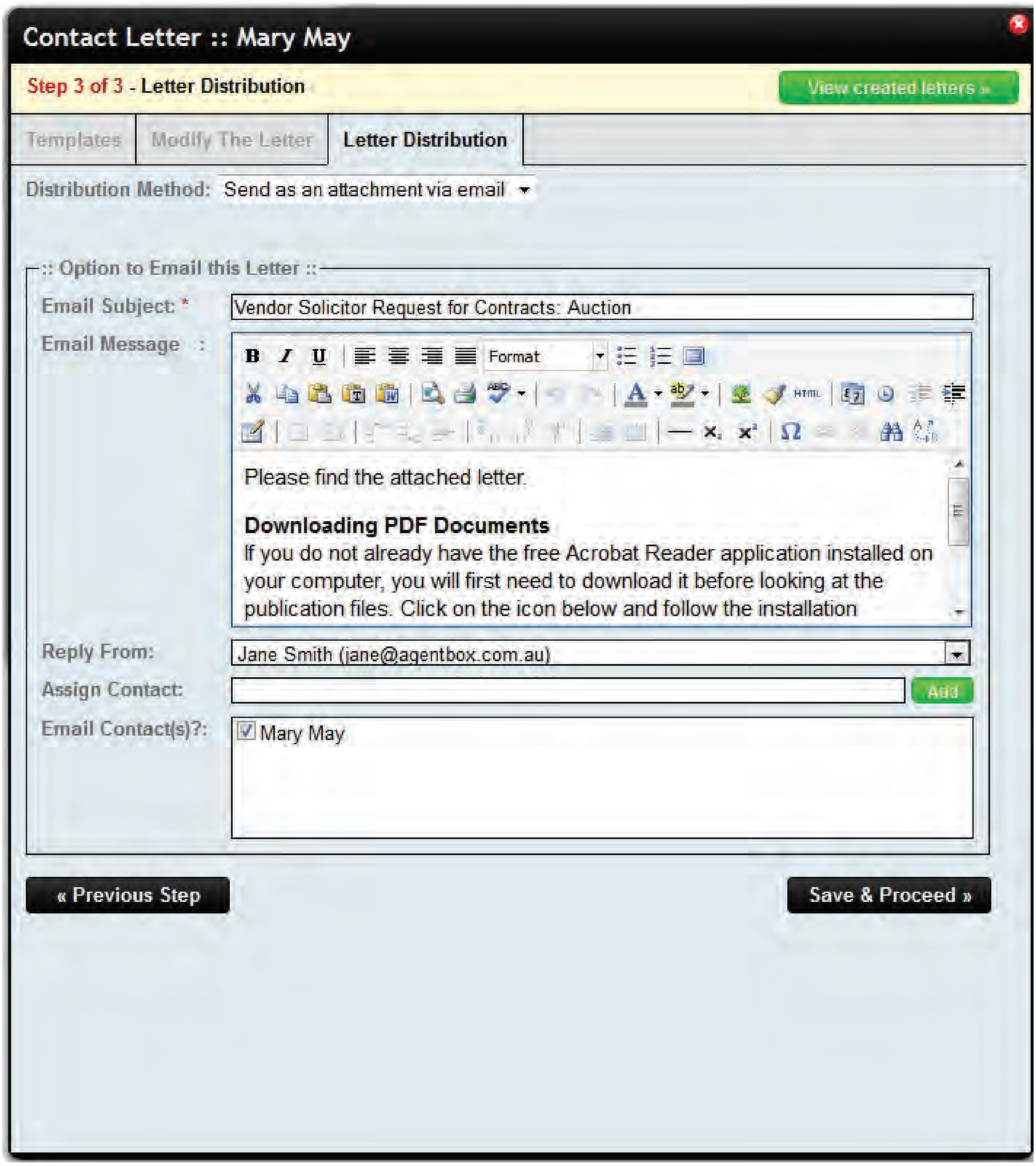
6. Click on Save & Proceed

Either

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



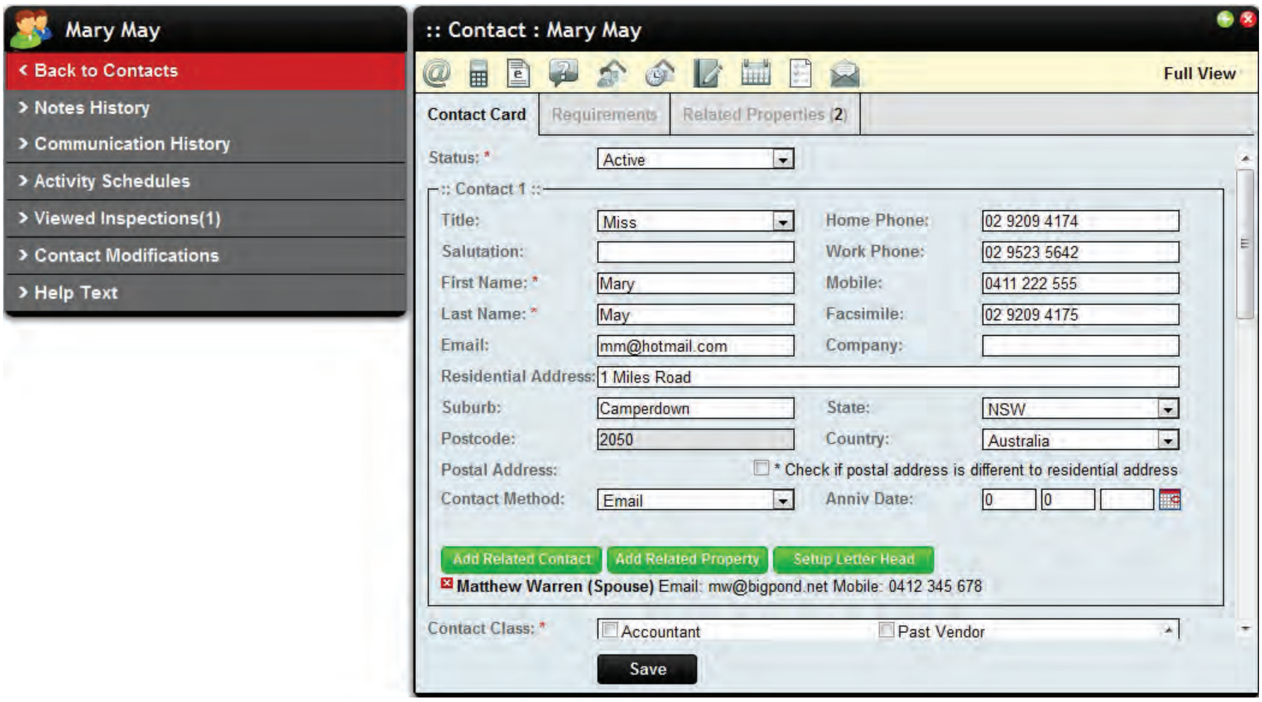
* Select delivery method from the drop down menu to either send as the body of an email 'Send as HTML' or attach to an email as a PDF.
  - o Enter Subject and Message
  - o Assign Contacts and select 'Add'
  - o Click on Save & Proceed to Email



View Contact Modifications

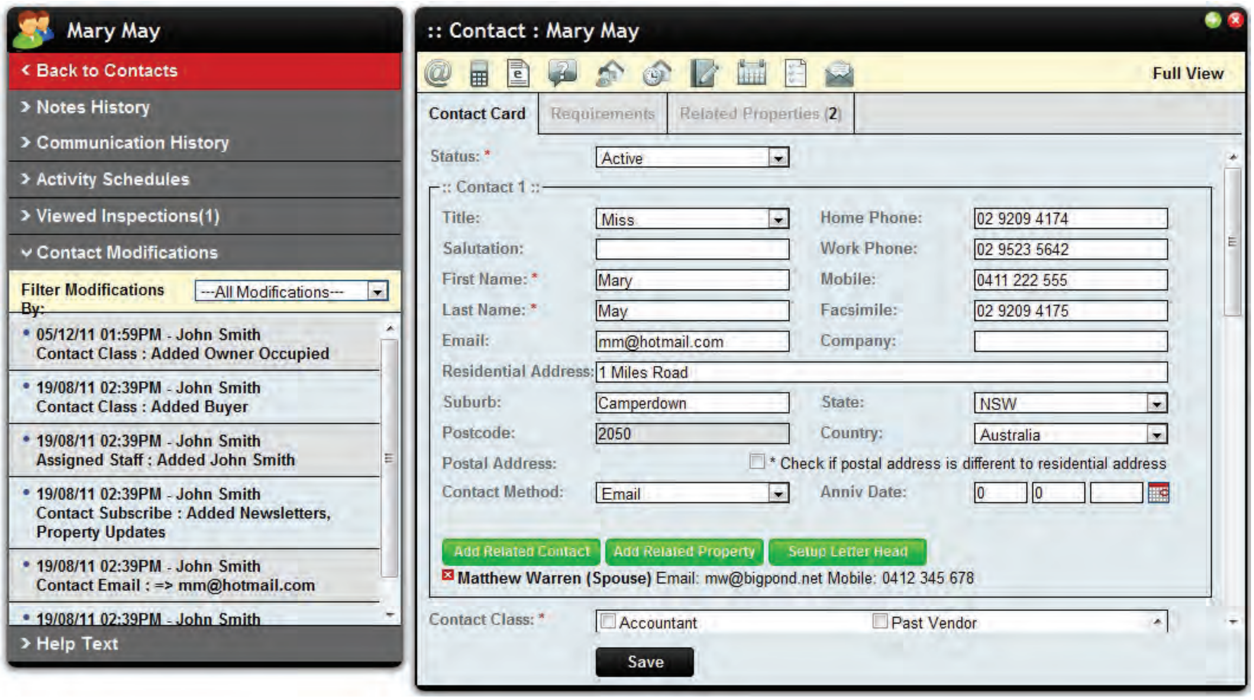
View Contact Modifications

1. Search for your Contact and open their Contact Card



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.



Tasks

Tasks

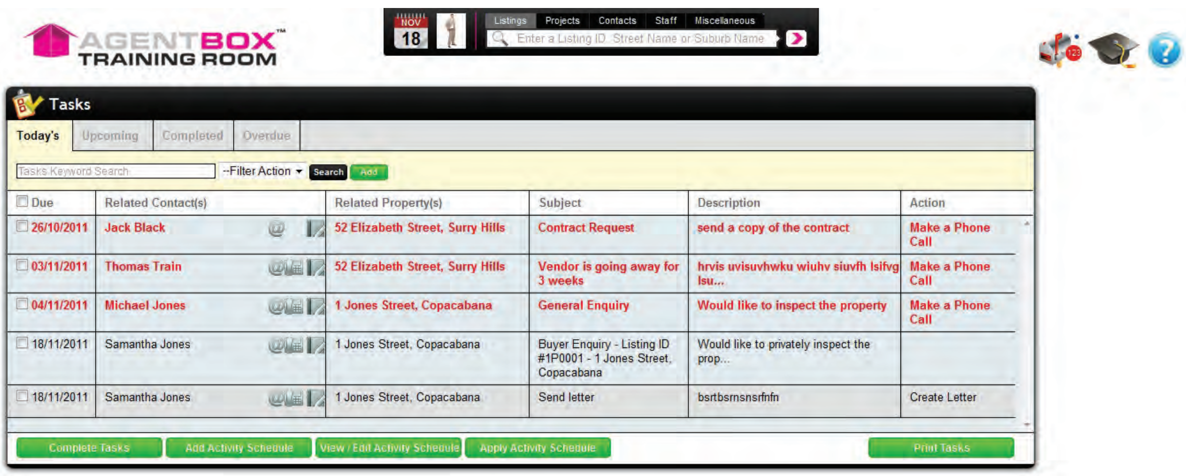
In 'Tasks' you can add/edit/archive staff members. Edit the office contact details, request portals etc.

Task View

How do I view my tasks?

1. Click on tasks on the main menu.

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



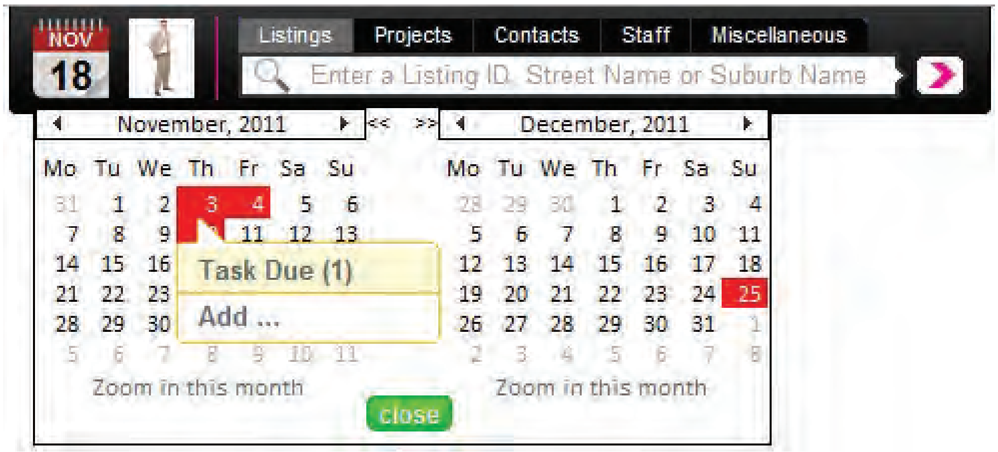
Other Ways to View Tasks

Other Ways to View/Add/Edit My Tasks

Through your Calendar

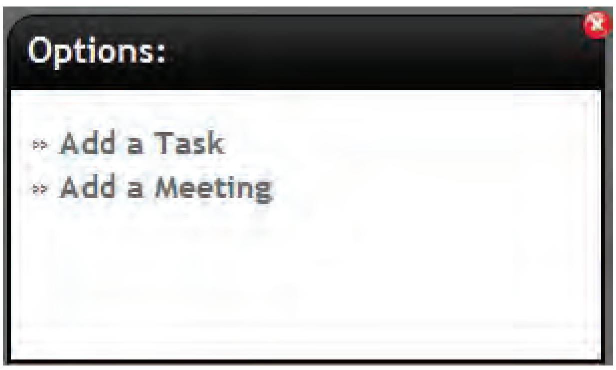
1. Click on the Calendar icon from the Universal Search Bar

2. Click on the task date



To view/edit - Click Task Due
Click the task you would like to view/edit
Follow the steps How to Edit a Task

To add - Click Add...
Click on Add a Task
Follow the steps on How to Enter a Task



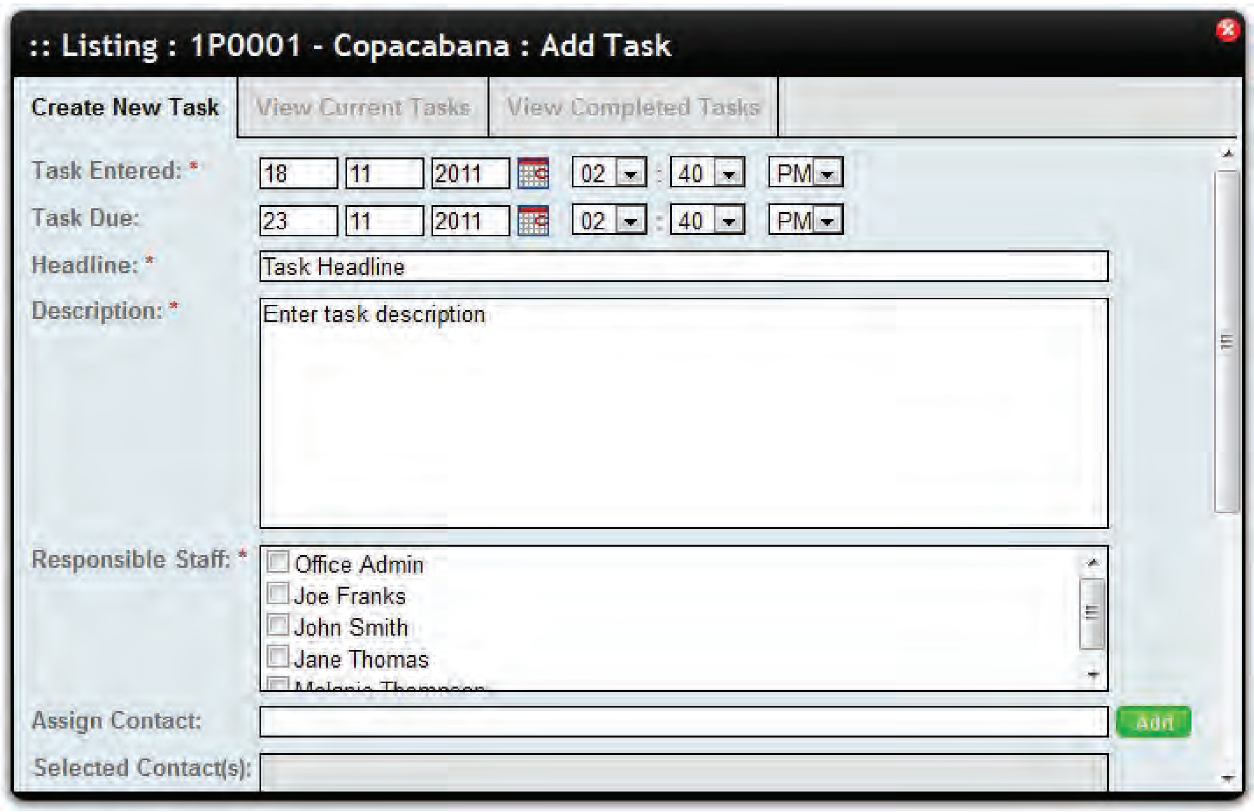
Enter Tasks

How do I add a task?

1. Click add a task from your Calendar, Property, Contact or the Task view screen.

2. Complete the task details

Task Entered: - the date the task is created
Task Due: - the date the task is due
Headline: * - compulsory field
Description: *- compulsory field
Responsible Staff: *- compulsory field
Assign Contact: - to link the task to a contact
Selected Contact(s): - to link the task to a property
Assign Action: - to link an action e.g. create a letter
Selected Actions: lists the assigned action, if send a letter; E-Newsletter etc. you can select the template
Task Completed?: - Check this box to complete a task



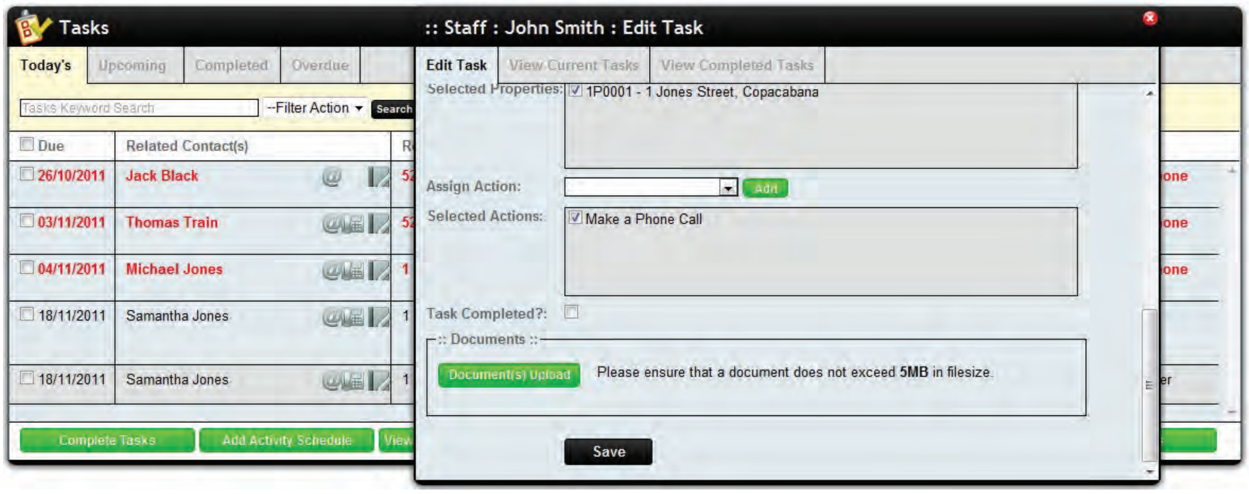
3. Hit save, the task will appear in your task view on it's due date.
or
4. Hit Save & Add file, to upload and attach a document to your task.

Edit Tasks

How do I edit a task?

1. Open your task from your [Calendar], [Property], [Contact] or the [Task view] screen.

2. Edit the task details, upload document and/or assign action and hit save

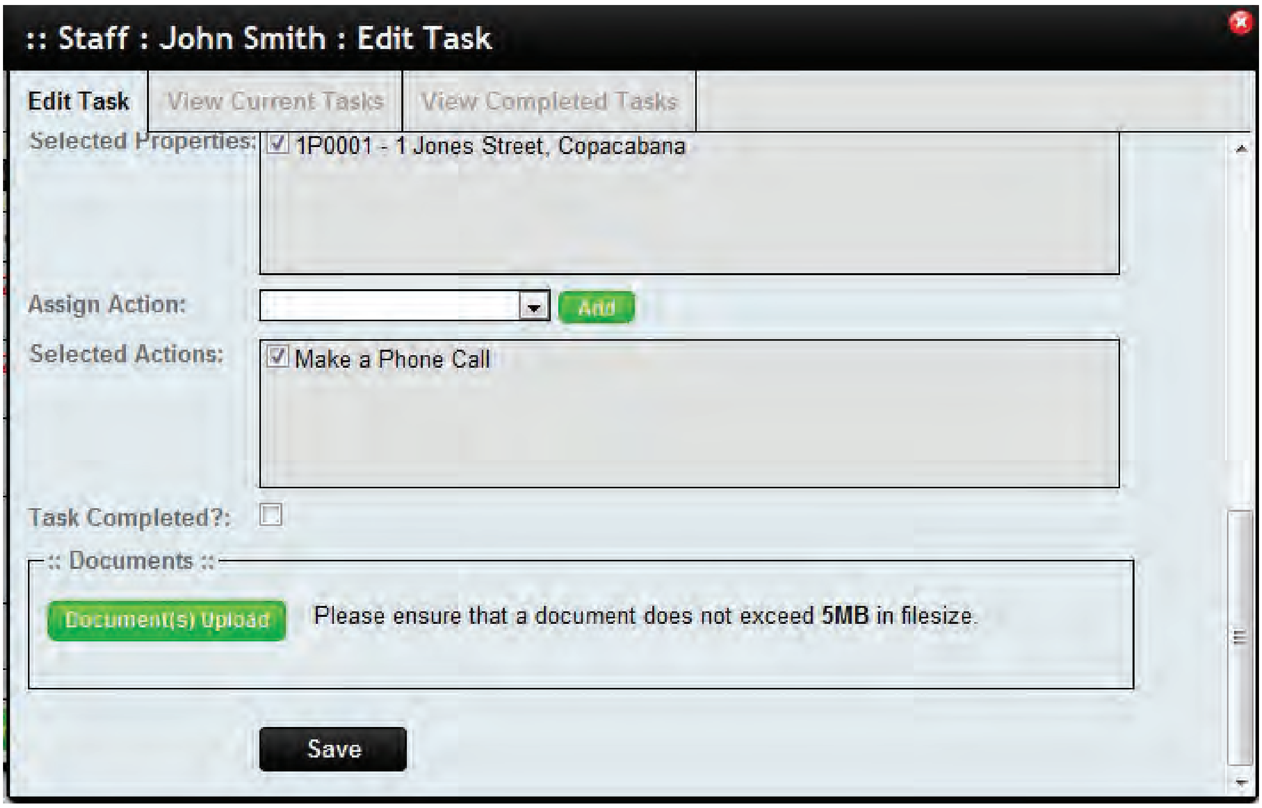


Attach File to Task

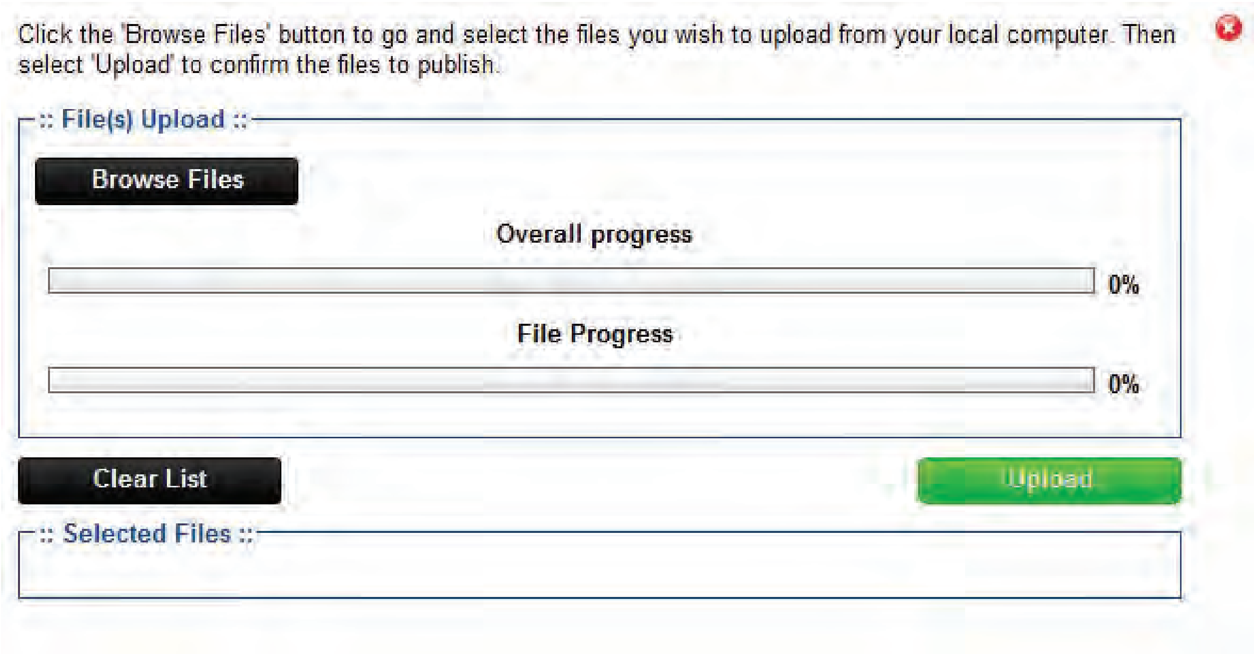
How do I attach a file to a task?

1. You can add a file to a task when creating the task for the first time or by editing a task.

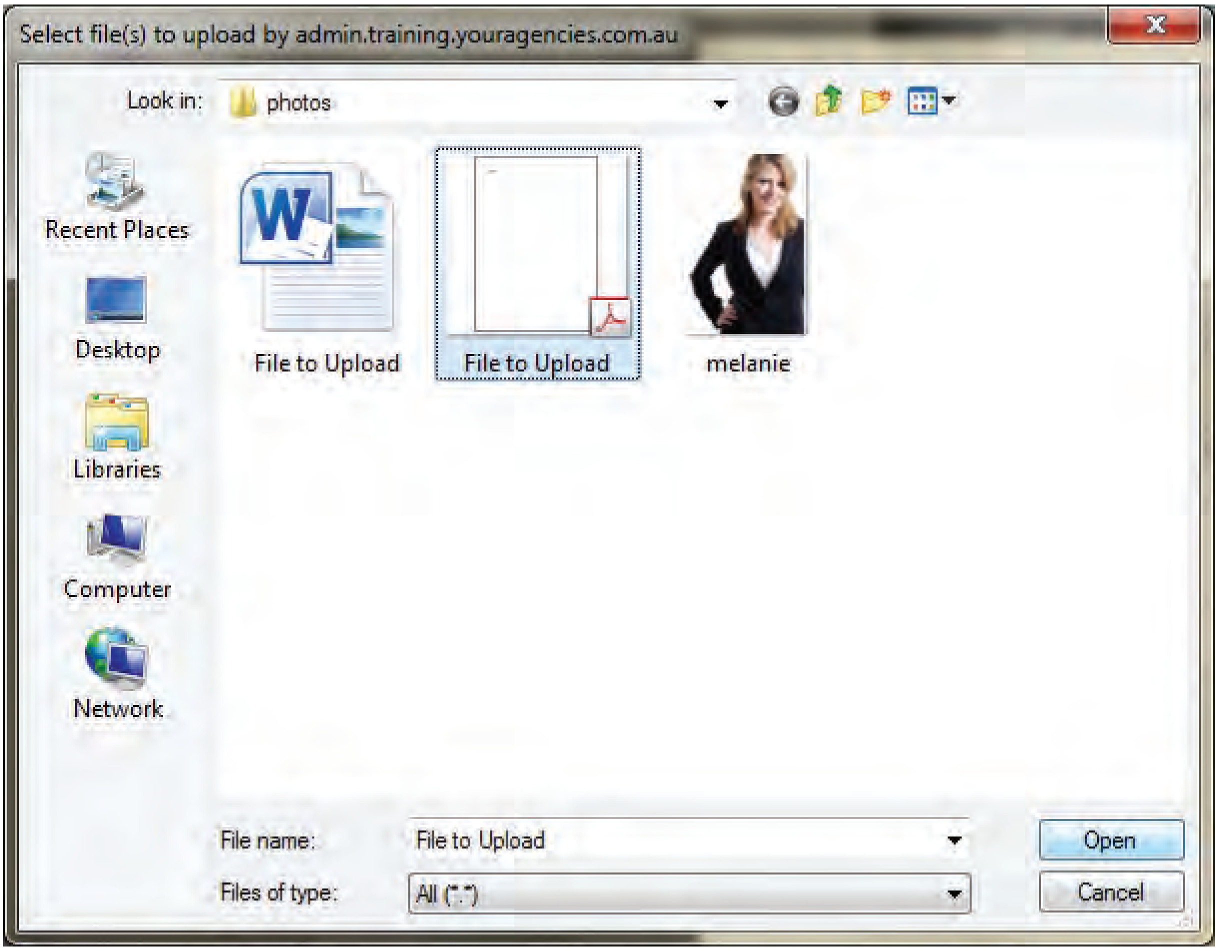
2. This example is from editing a task. Click the green Document(s) Upload button



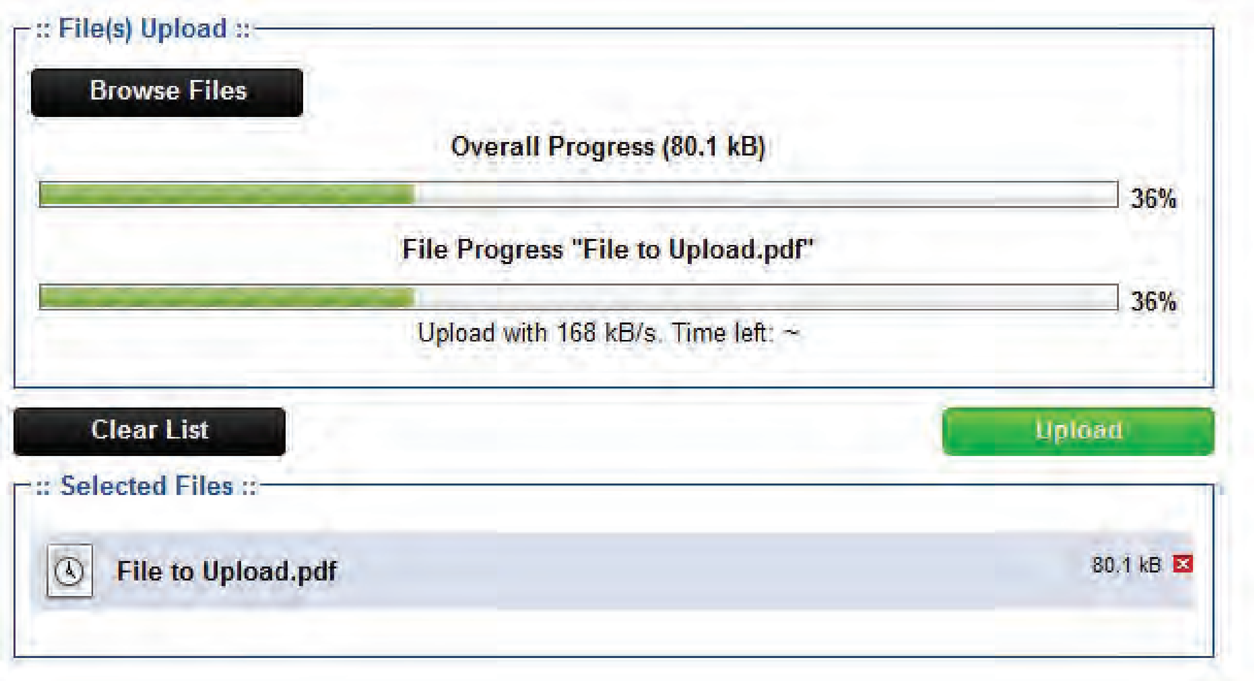
3. Click Browse



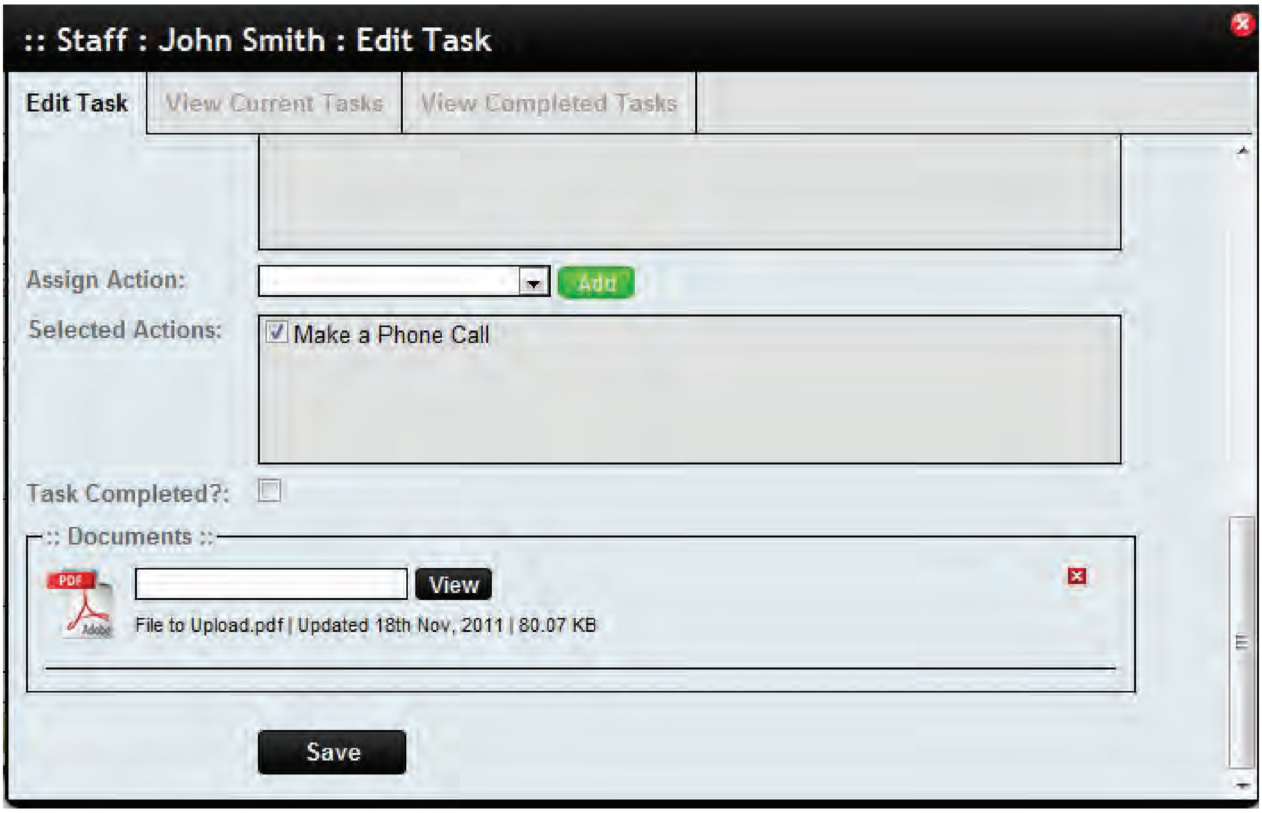
2. Click on the file you would like to upload then click open. (You can upload one file per task, if you would like to attach multiple files upload a zip folder containing all related files)



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



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



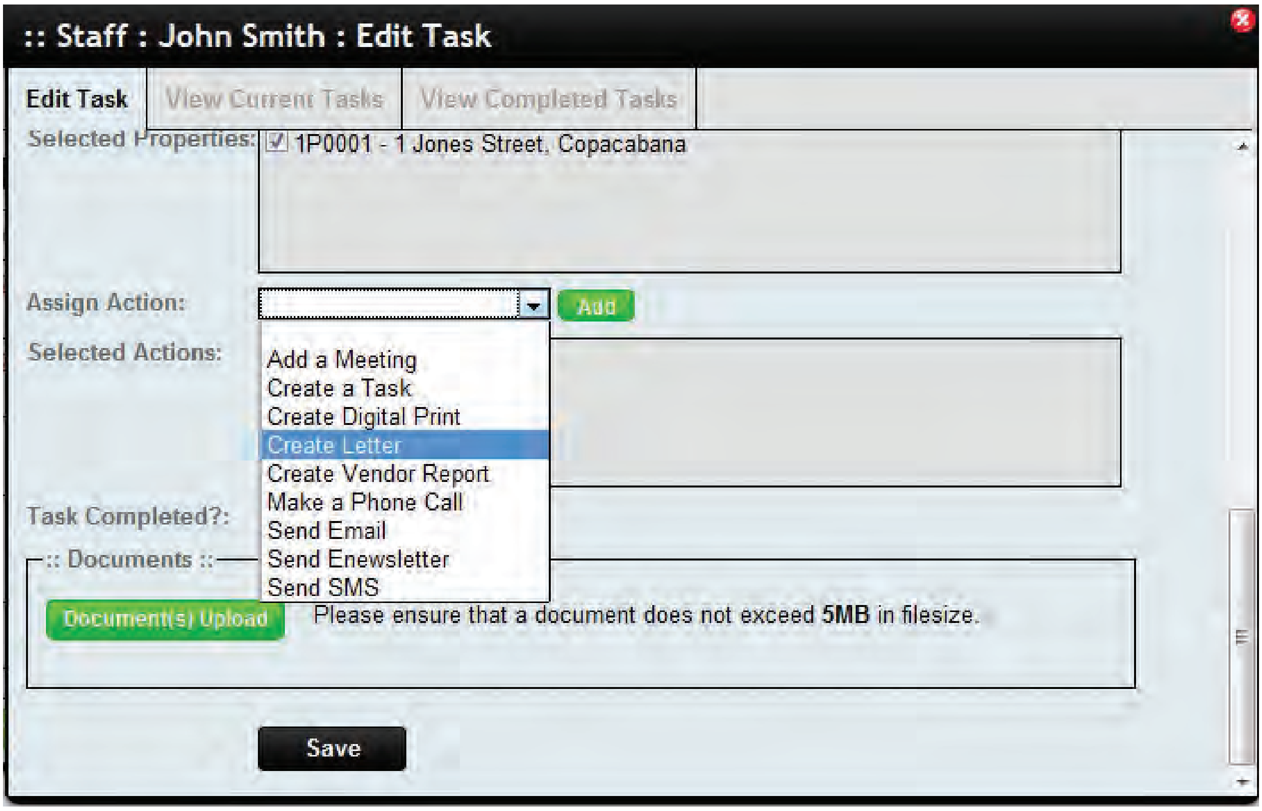
5. Click Save to finish

Assign Action to Task

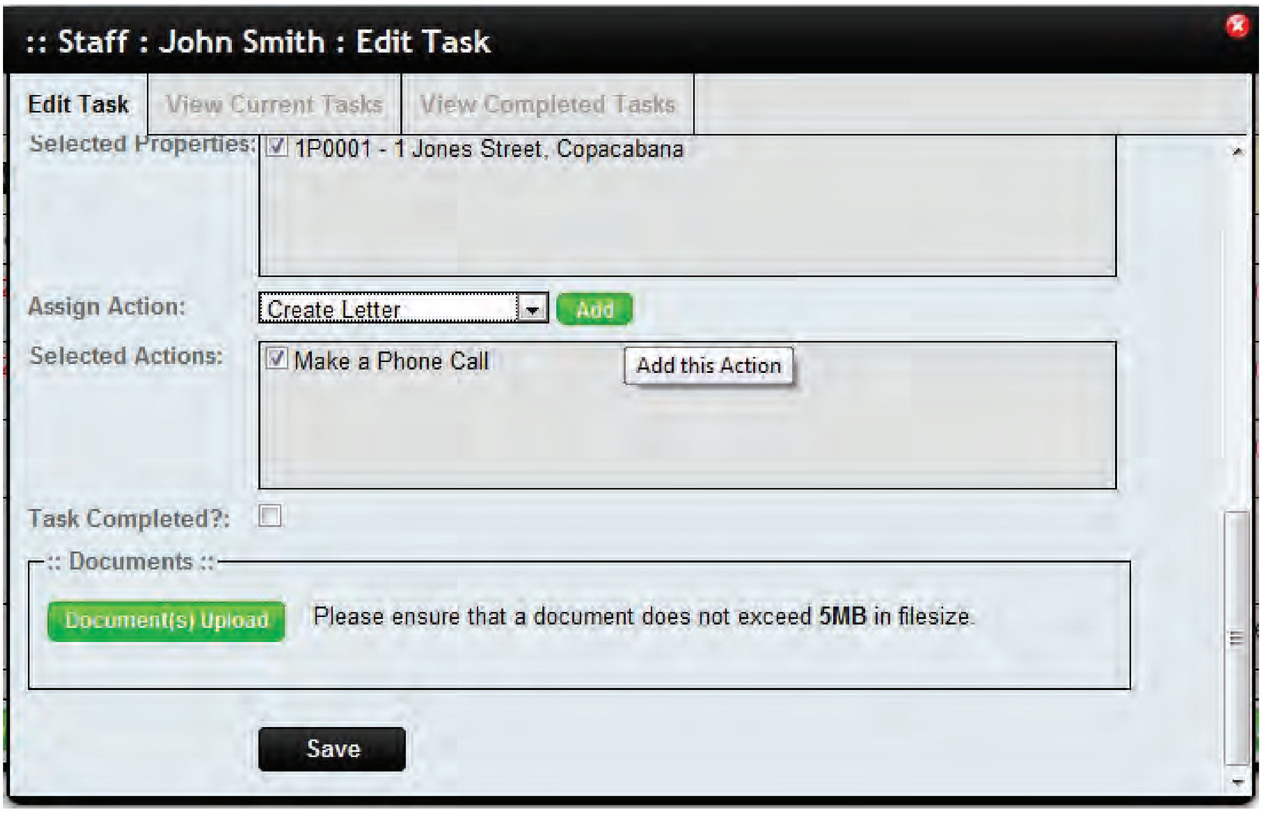
How do I assign an action to a task?

1. You can add a file to a task when creating the task for the first time or by editing a task.

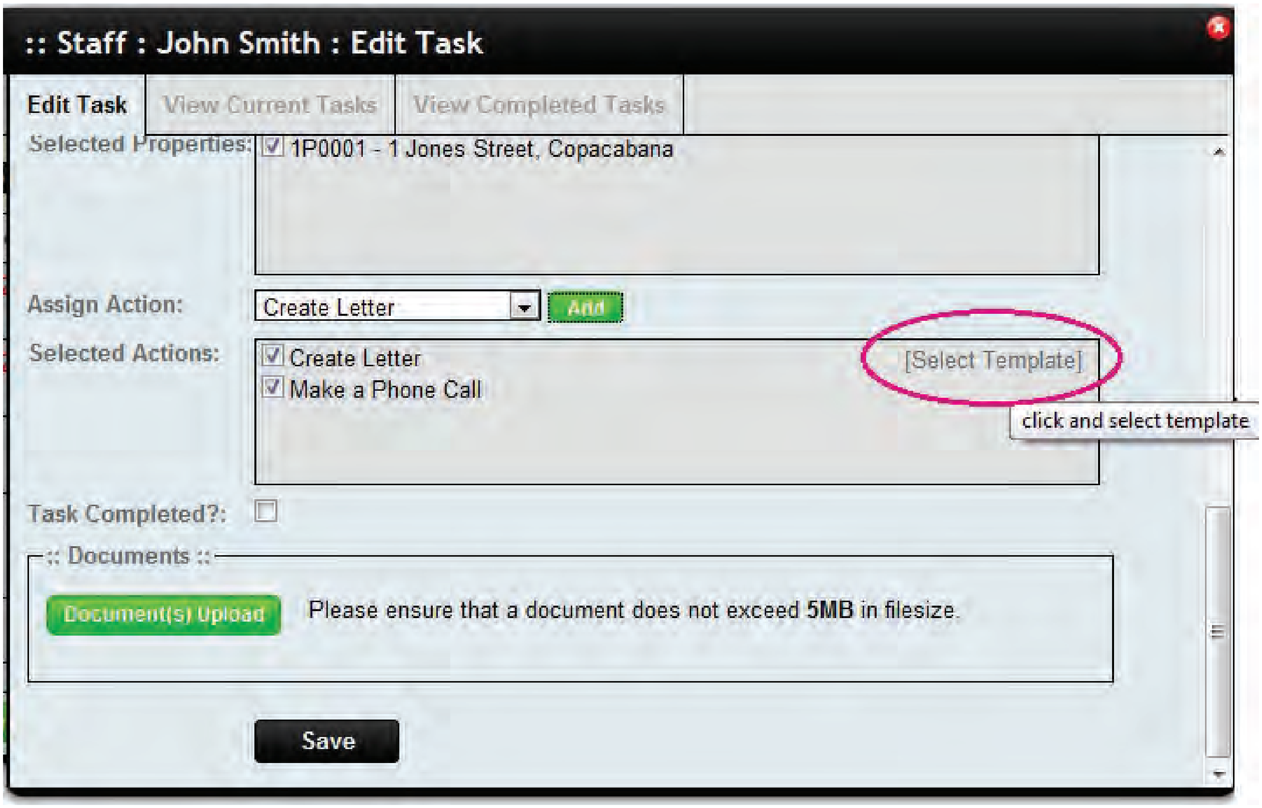
2. This example is from editing a task. Select the action from the Assign Action drop down.



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

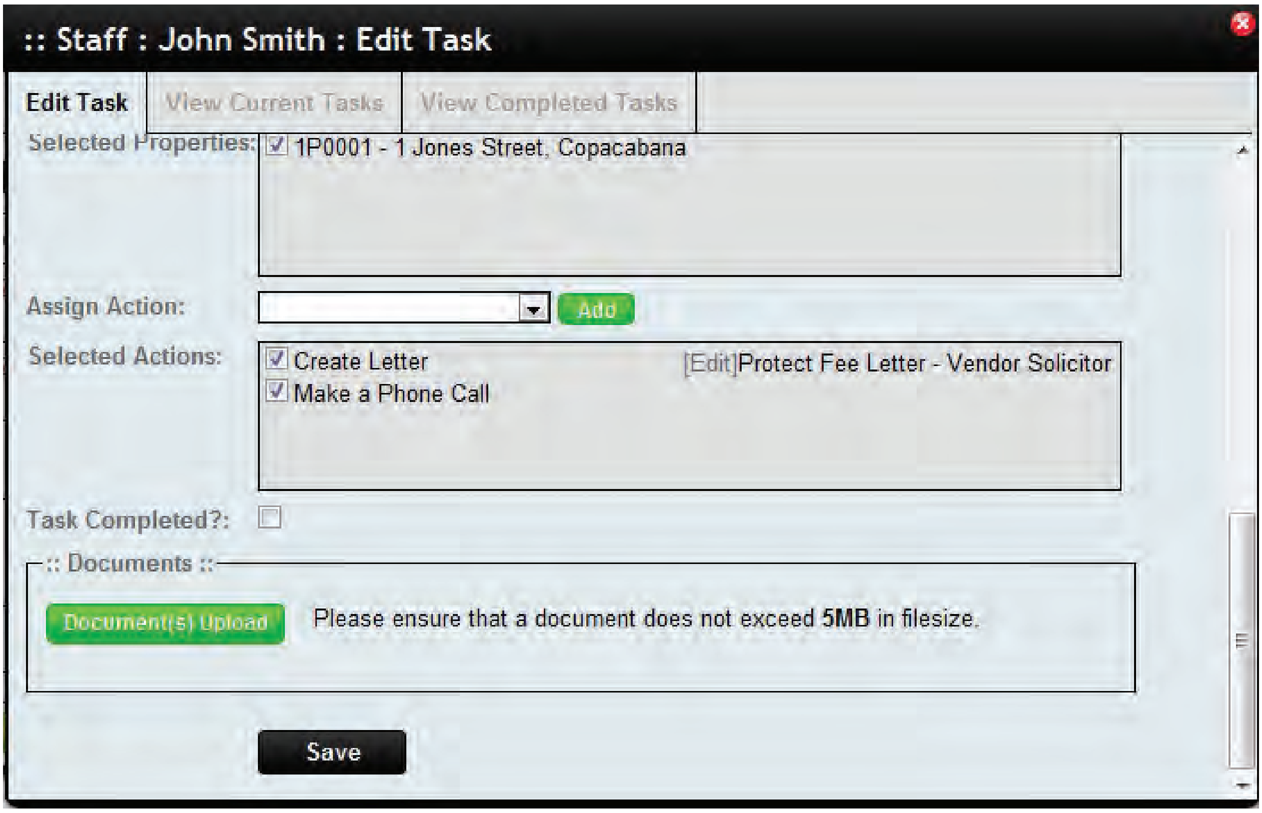


4. If assigning a letter, digital print or e-newsletter you can select the template your would like to use by clicking Select Template.



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

6. Click Save to finish

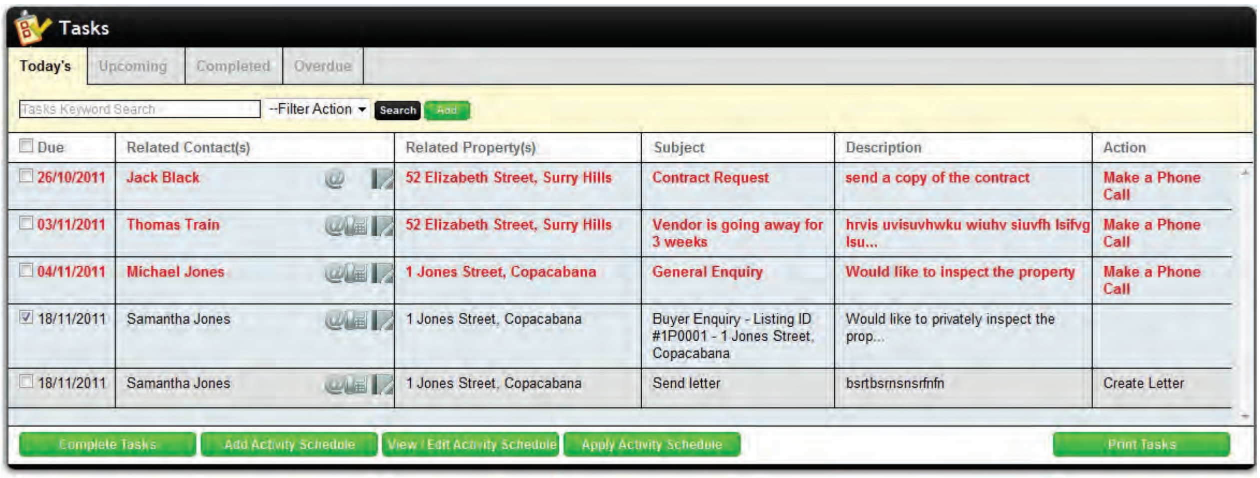


Completing Tasks

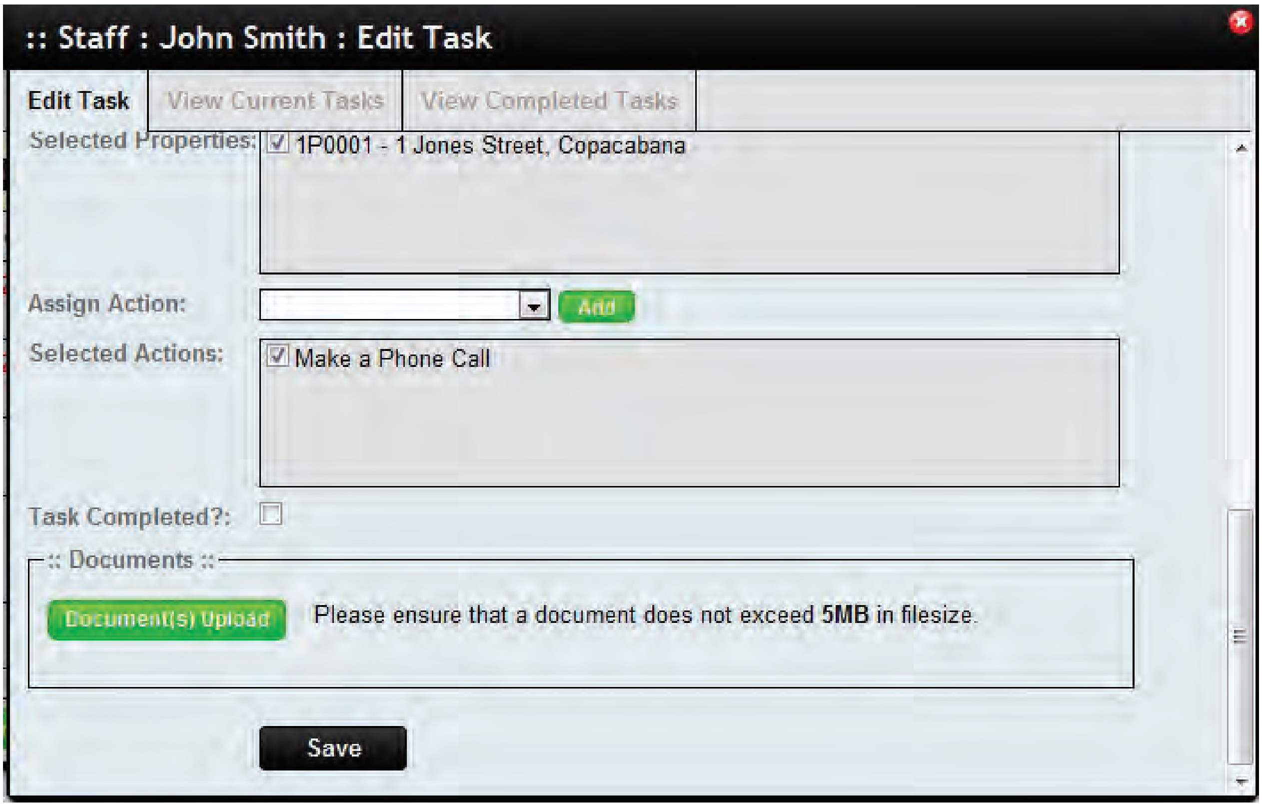
How do I complete a task?

1. You can mark a task complete in the task view or by editing a task

2. In the task view, tick the check box next to the task you would like to mark complete and tick the green Complete button at the bottom of the view.



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



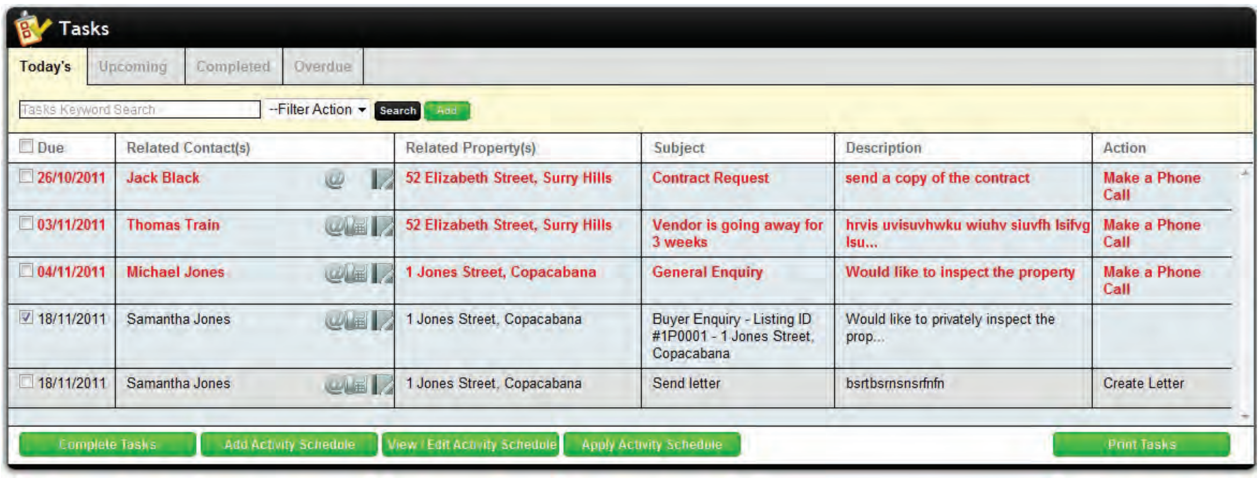
4. You can view your completed tasks in the related [property](), [contact]() or from your completed tab in the [task view]()

Bulk Complete Tasks

How can I complete multiple tasks at once?

1. Click on tasks on the main menu.

2. In the task view, tick the check box next to the task(s) you would like to mark complete and tick the green Complete button at the bottom of the view.



4. You can view your completed tasks in the related [property](), [contact]() or from your completed tab in the

task view

Print Tasks

How do I print my task list?

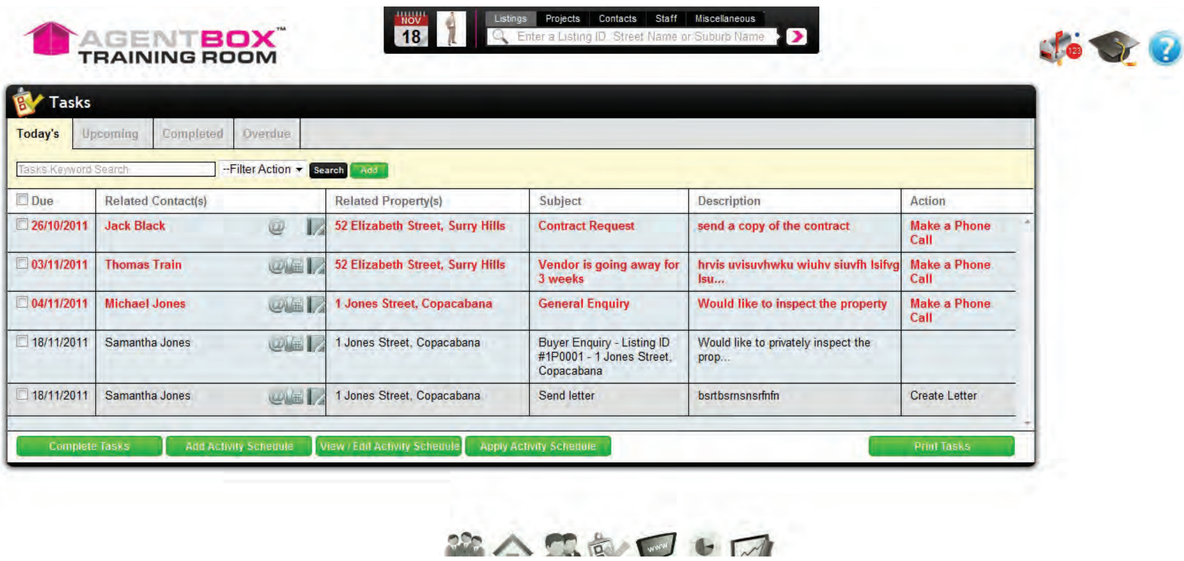
1. Go to 'Tasks' on the main menu.

2. Click on the green 'Print Tasks' button.

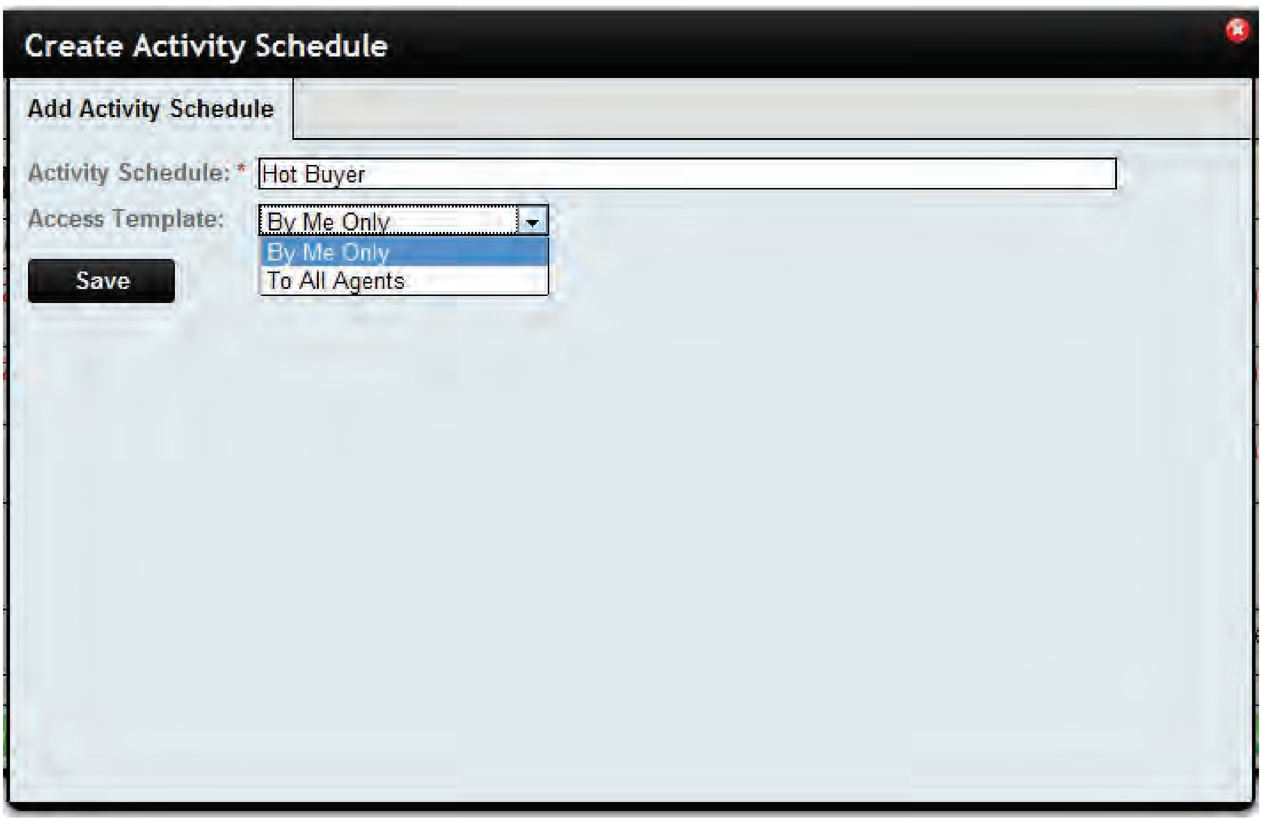
Create Activity Schedule

How do I create an Activity Schedule template?

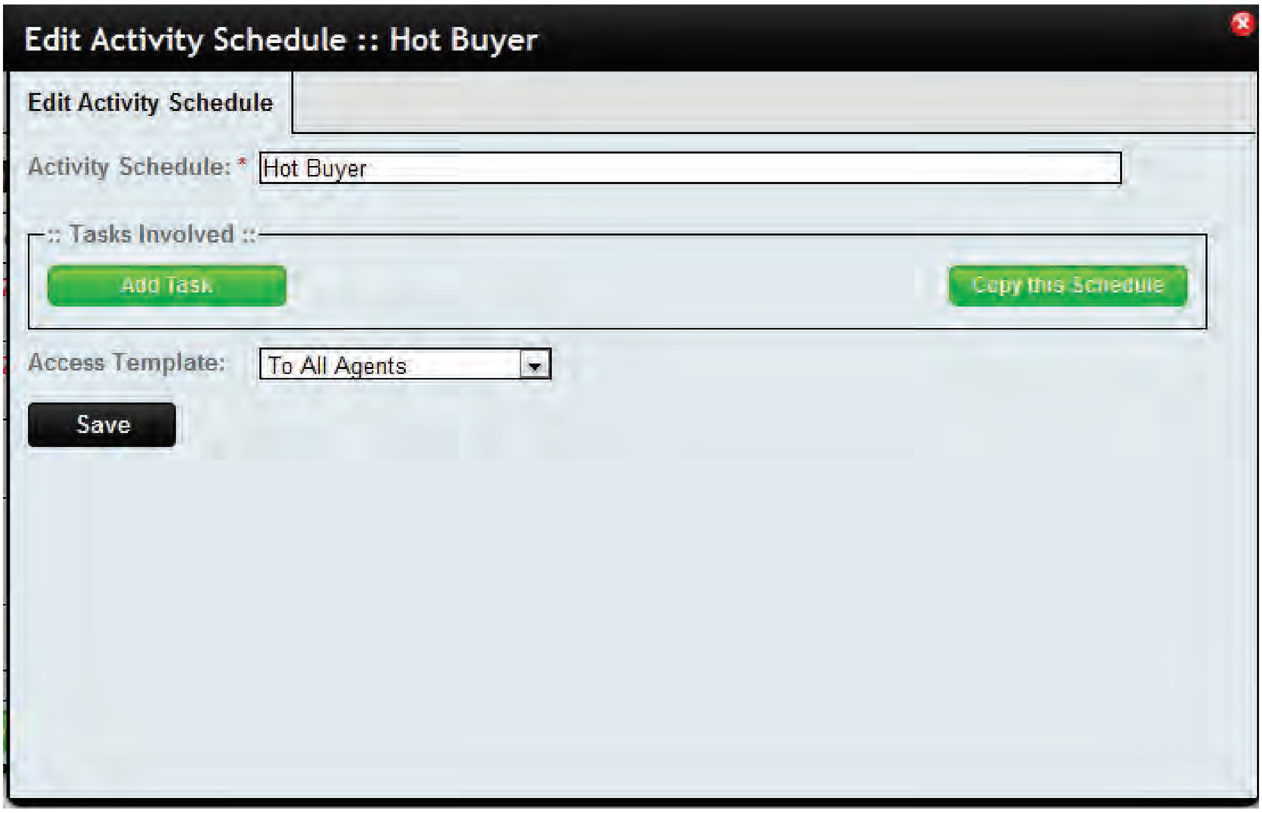
1. Click on Tasks on the main menu
2. Click the Green 'Add Activity Schedule' button on the Task panel



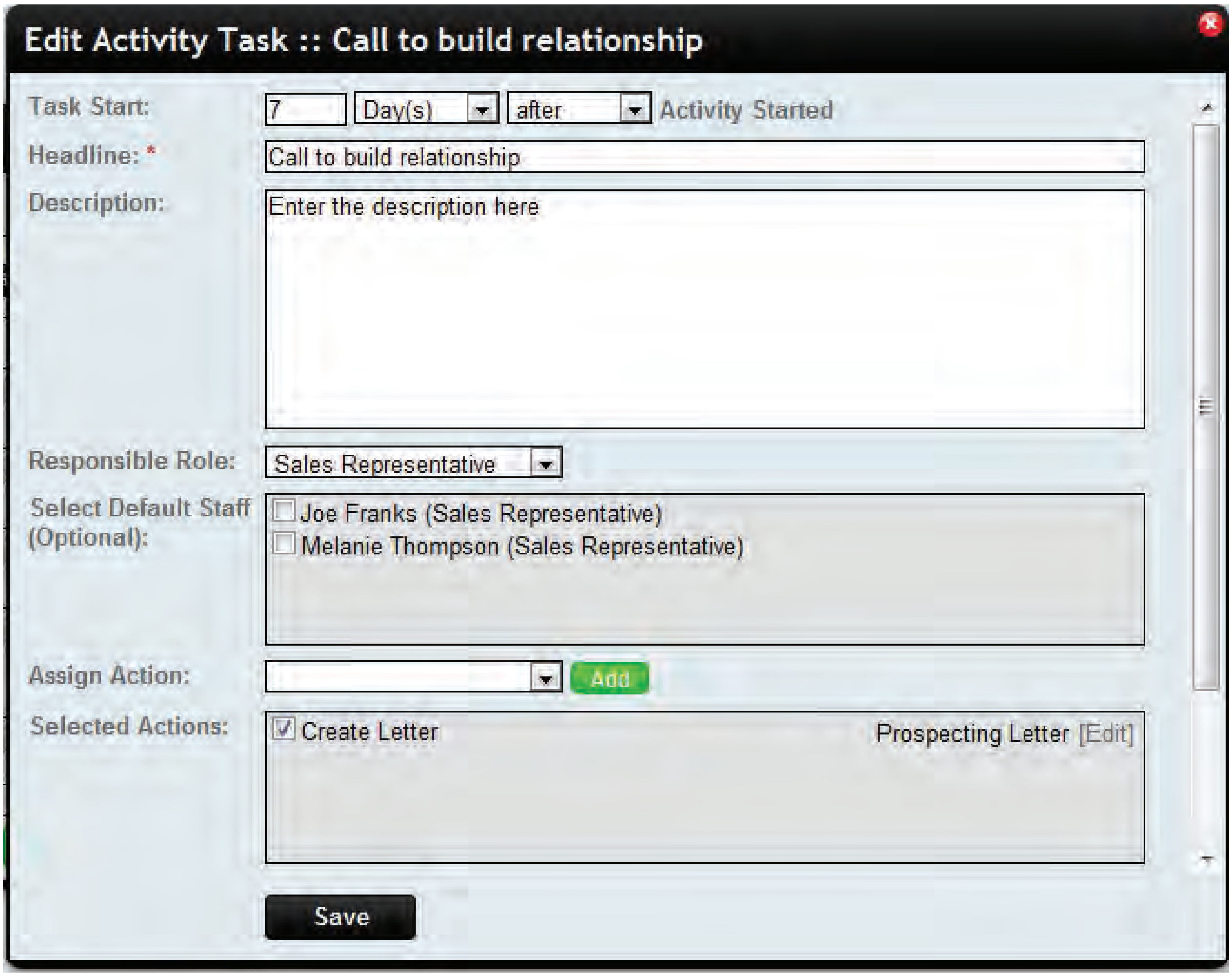
3. The 'Create Activity Schedule' window will appear.
   1. Give the template a name
   2. Select the template access from the drop down menu.
   3. Click 'Save' to proceed to the next step



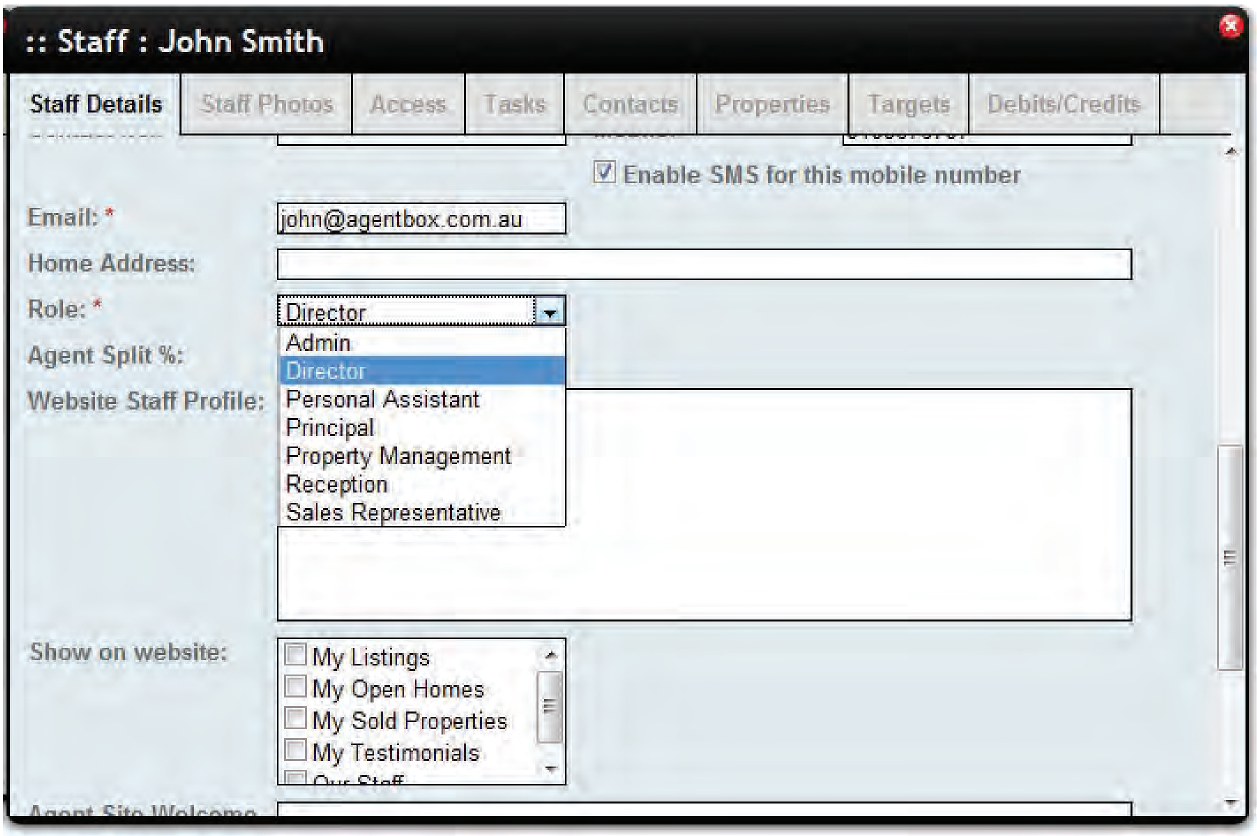
4. Click 'Add Task' to start building your template



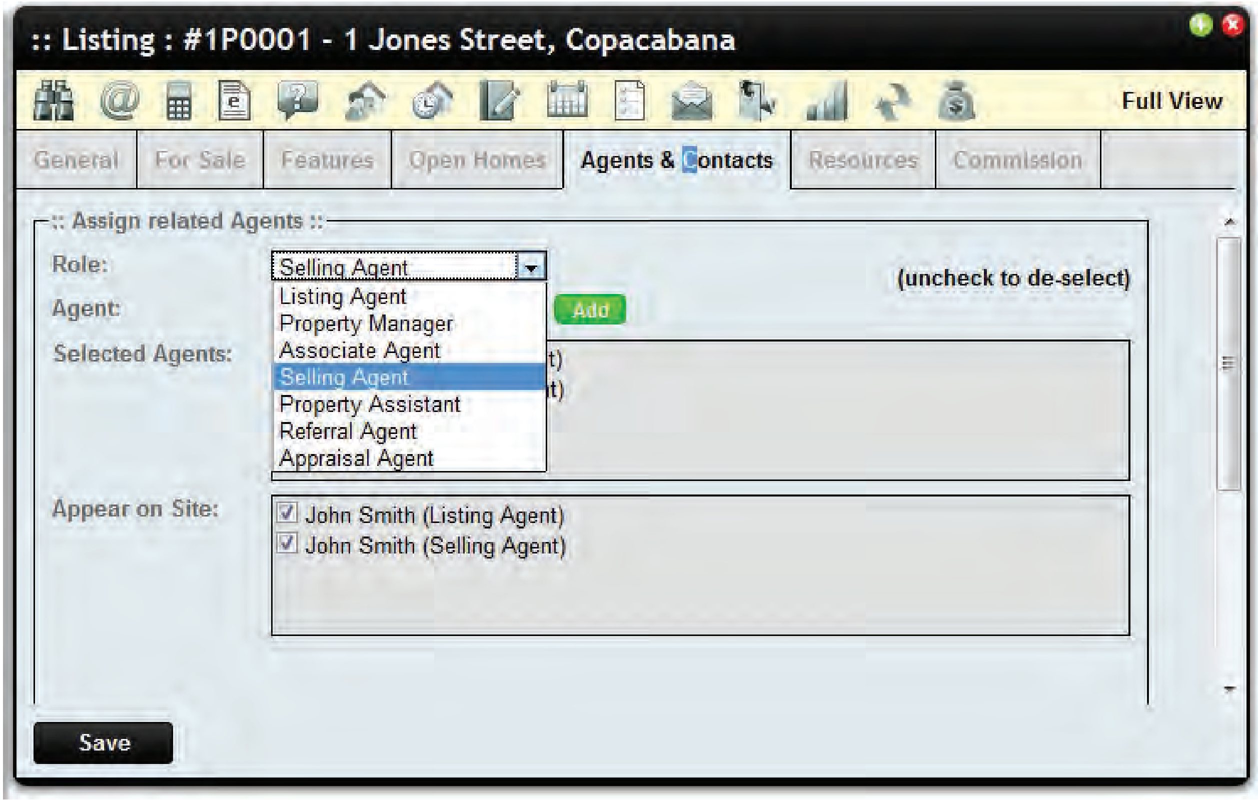
5. Enter in the task details and click 'save'



**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.*

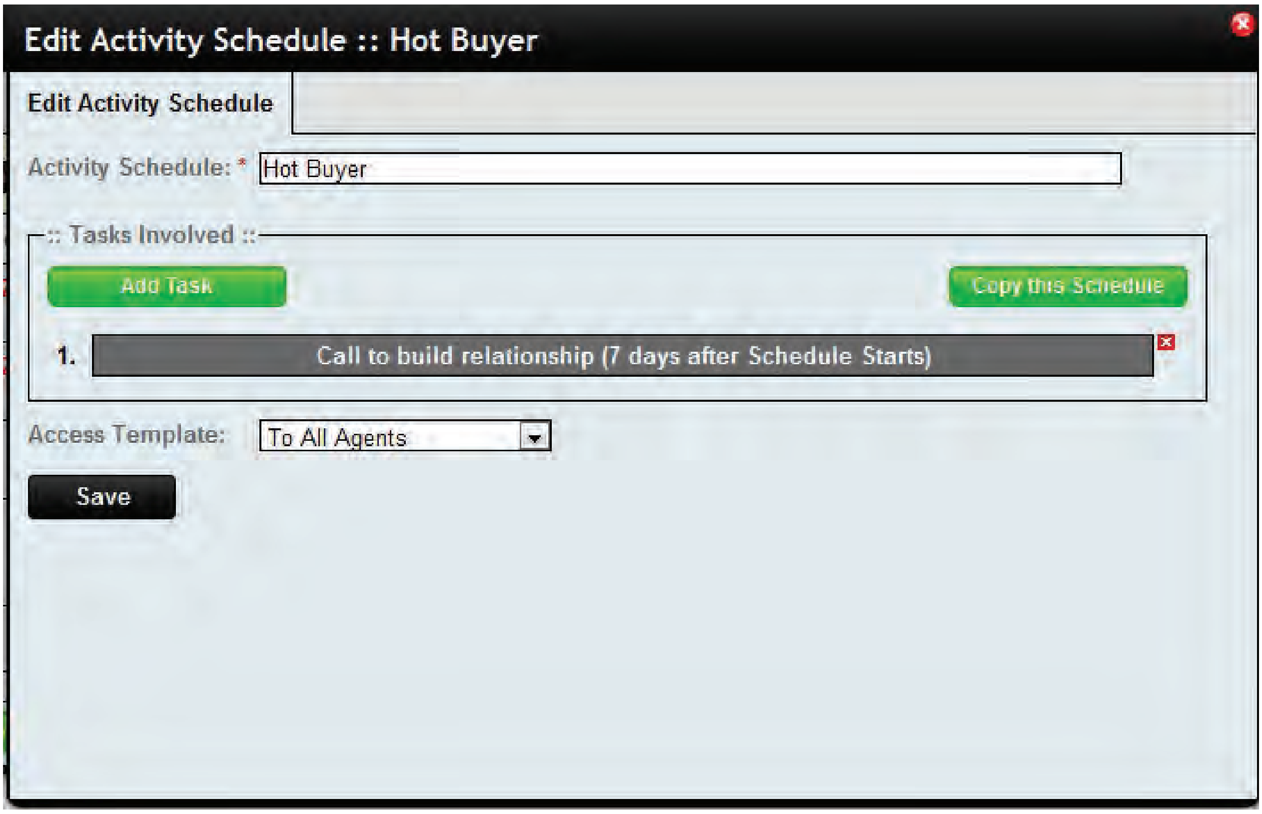


Or the role used to assign the agent to a property listing.



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.



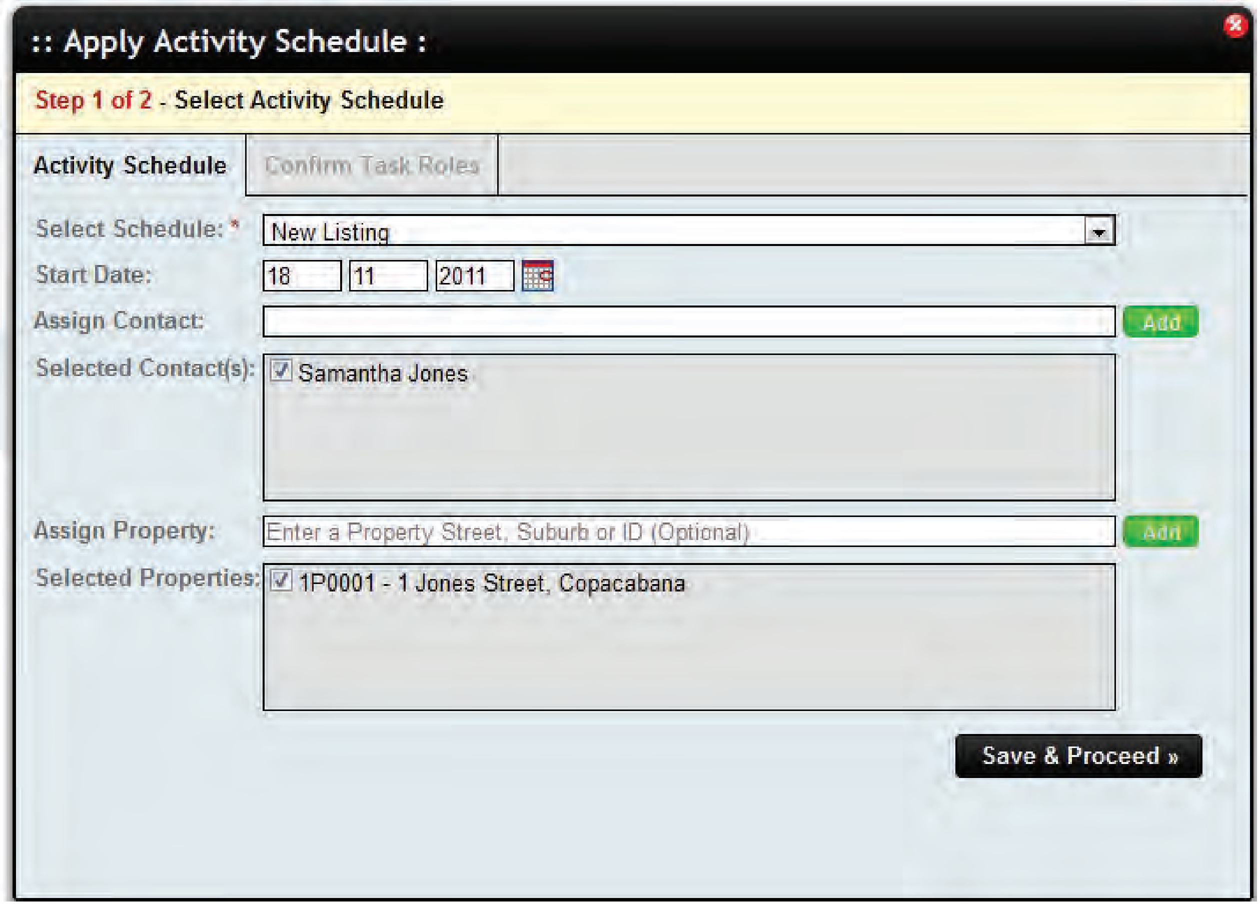
7. The new template will now be available in the 'Select Schedule' drop down menu when you apply an activity schedule to a contact or property

Apply Activity Schedule

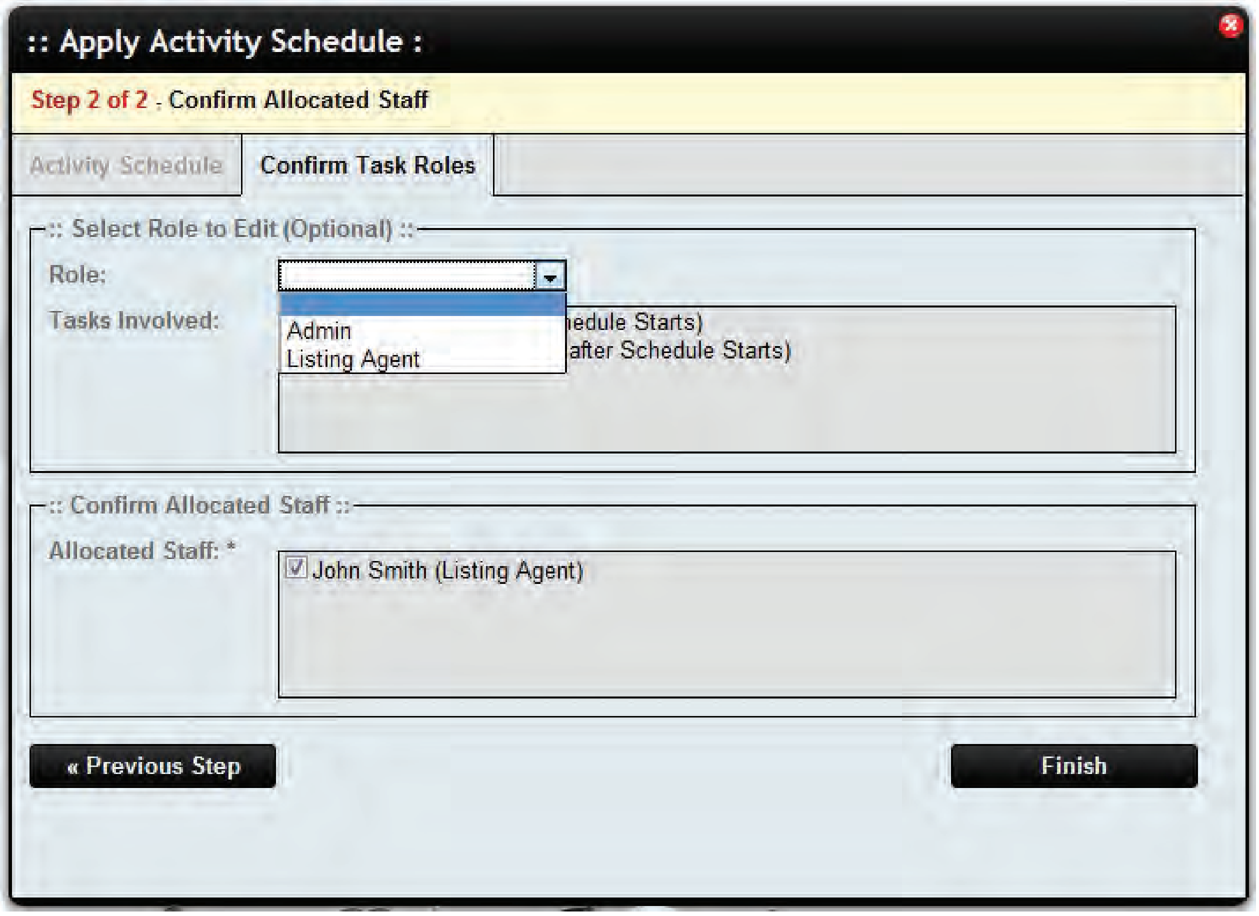
How do I apply an Activity Schedule?

1. Click apply an activity schedule from your Property, Contact or the Task view screen.

2. Select the template from the select schedule drop down.
3. Enter the start date, related contacts and properties and click save and proceed.

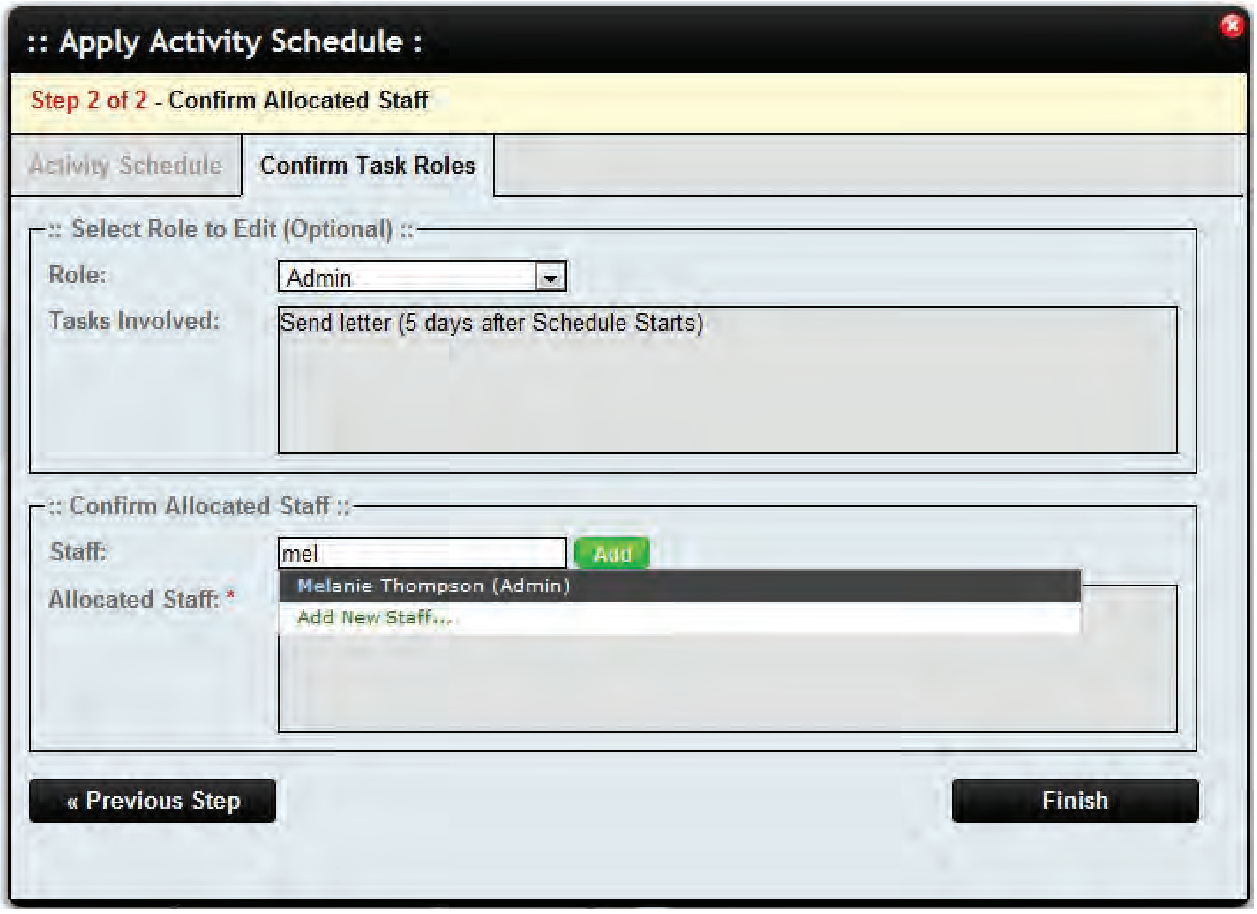


4. Ensure there is an allocated staff member for all roles in the template.
In this example there are 2 roles responsible for the tasks in this schedule however only the listing agent role has an assigned staff member.



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.*



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.

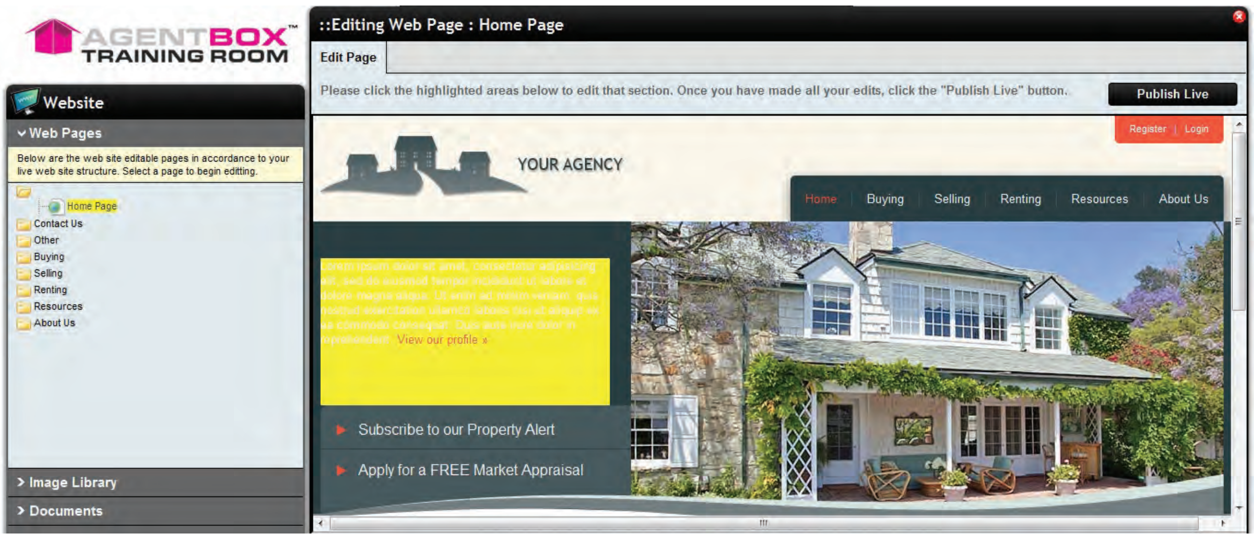
[How do I edit the website using the CMS (Content Management System)?]
[How do I change the Feature Property on my homepage?]
[How do I add/edit testimonials on my website?]

Edit Website Content

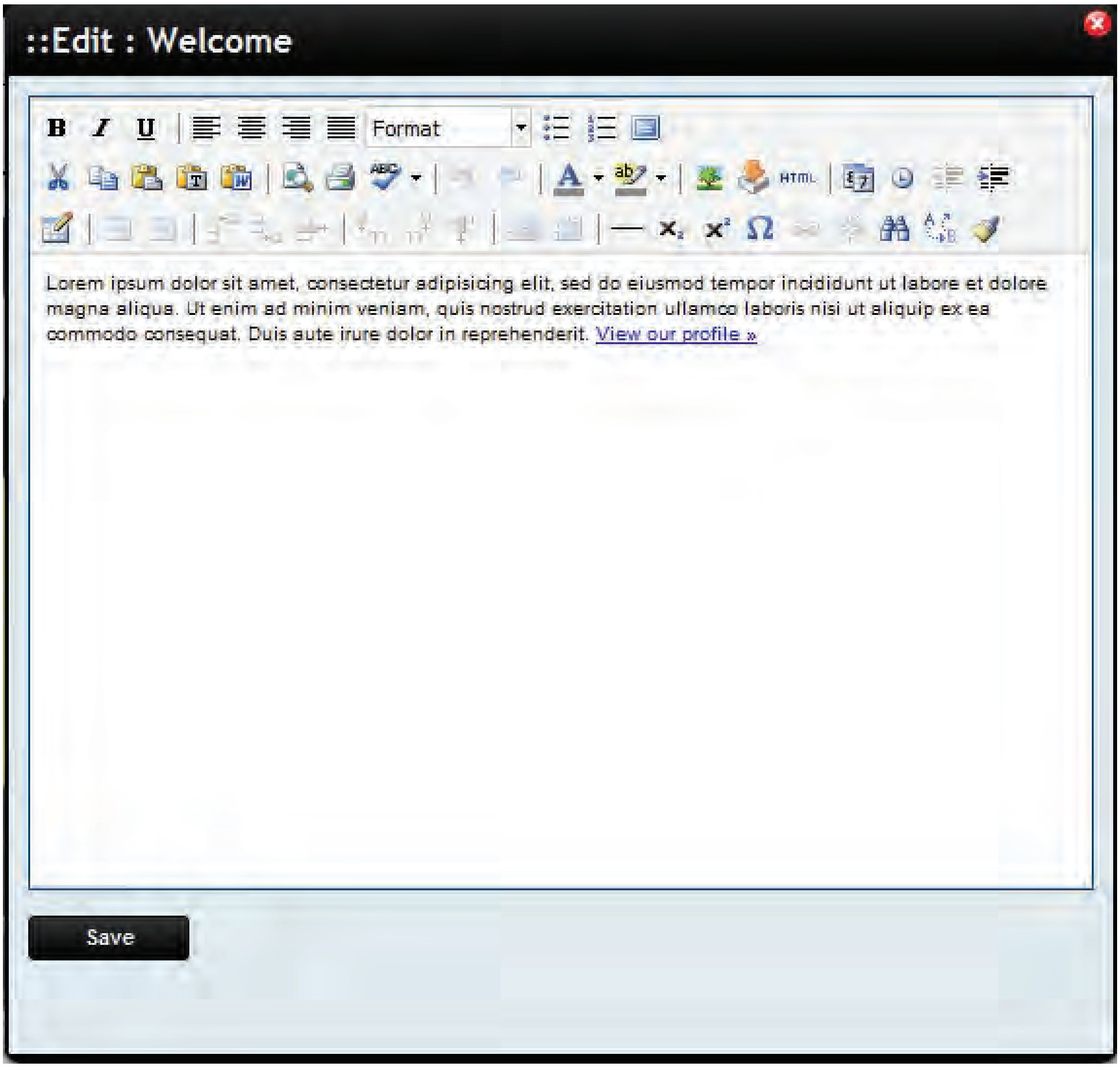
How do I edit the website using the CMS (Content Management System)?

1. Click on Website from the main menu

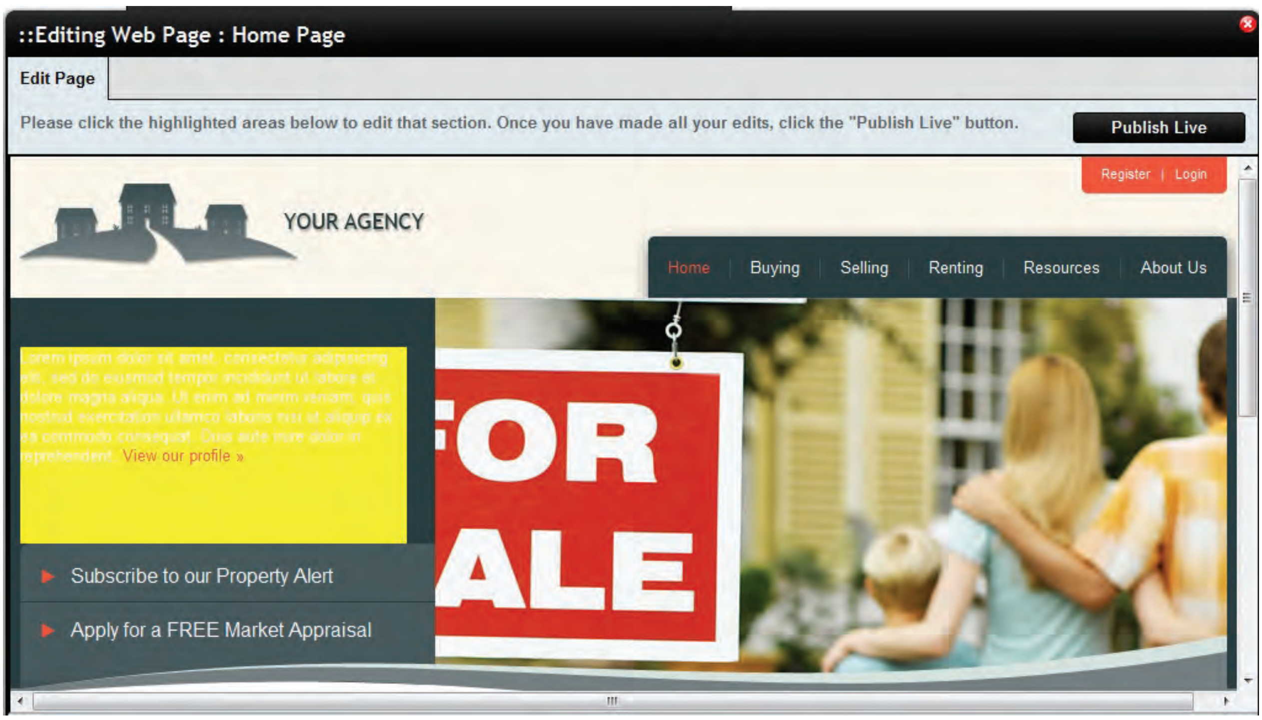
2. Click on the page you would like to edit from the left panel and the page will open in a centre panel.



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.

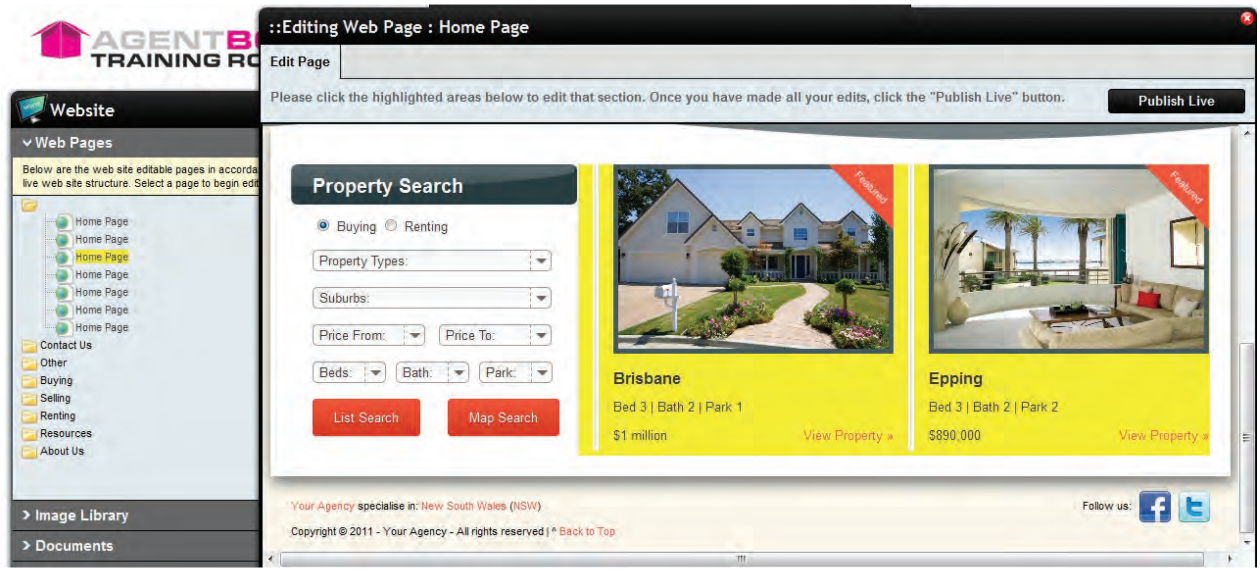


Feature Property

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.

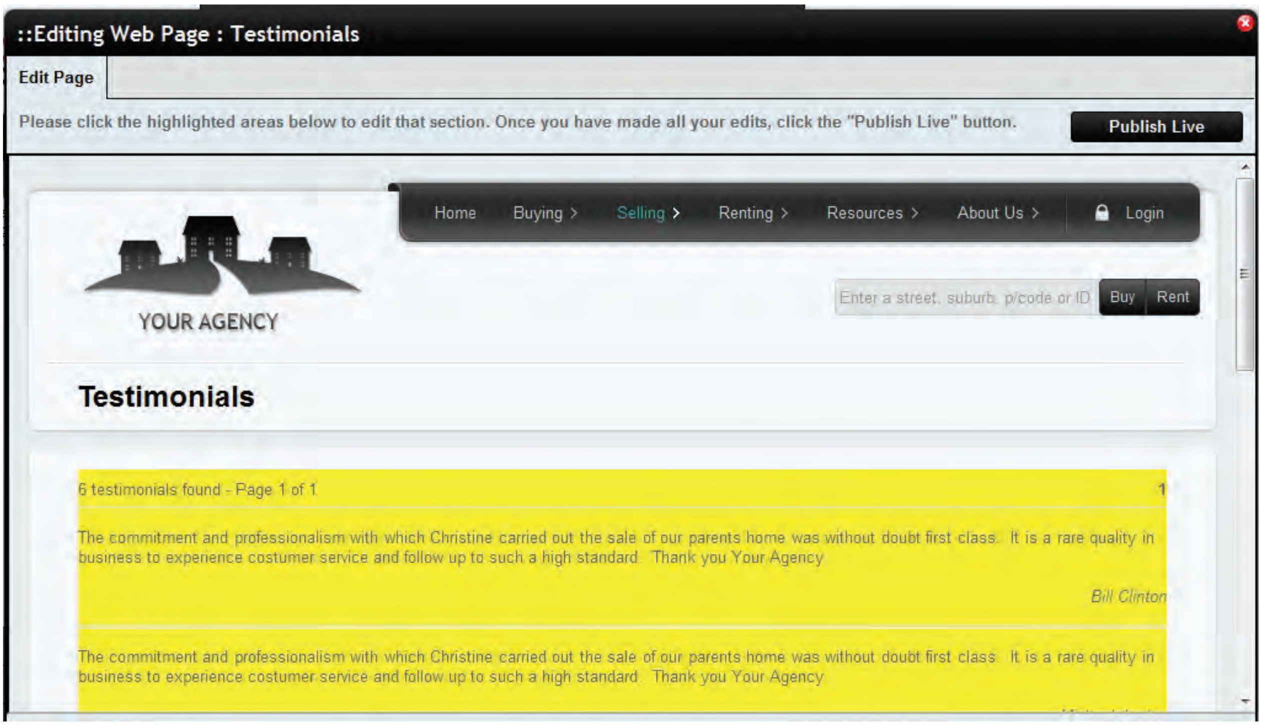
4. Preview the changes then click Publish Live to update your website.

Testimonials

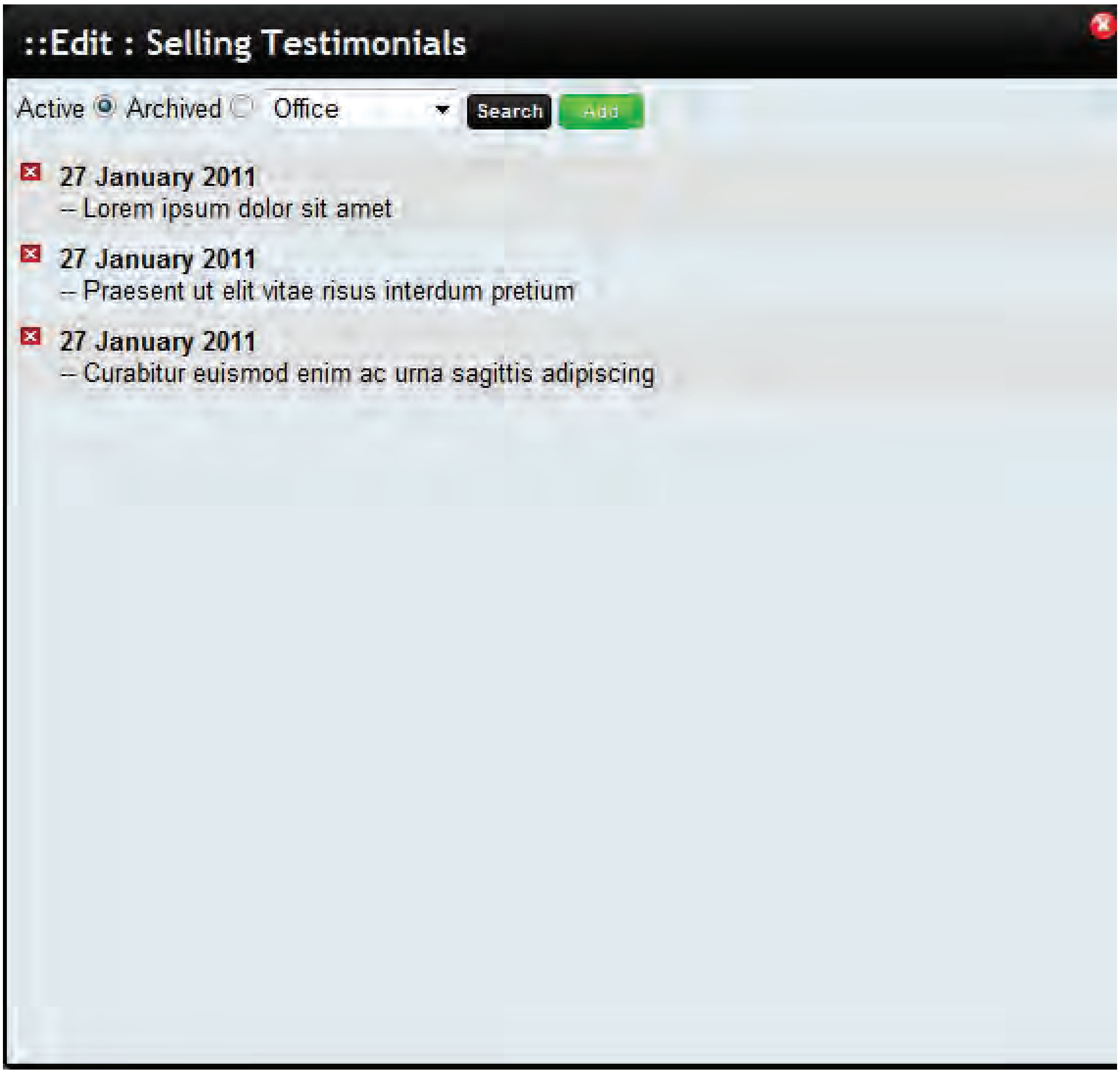
How do I add/edit testimonials on my website?

1. Click on Website from the main menu

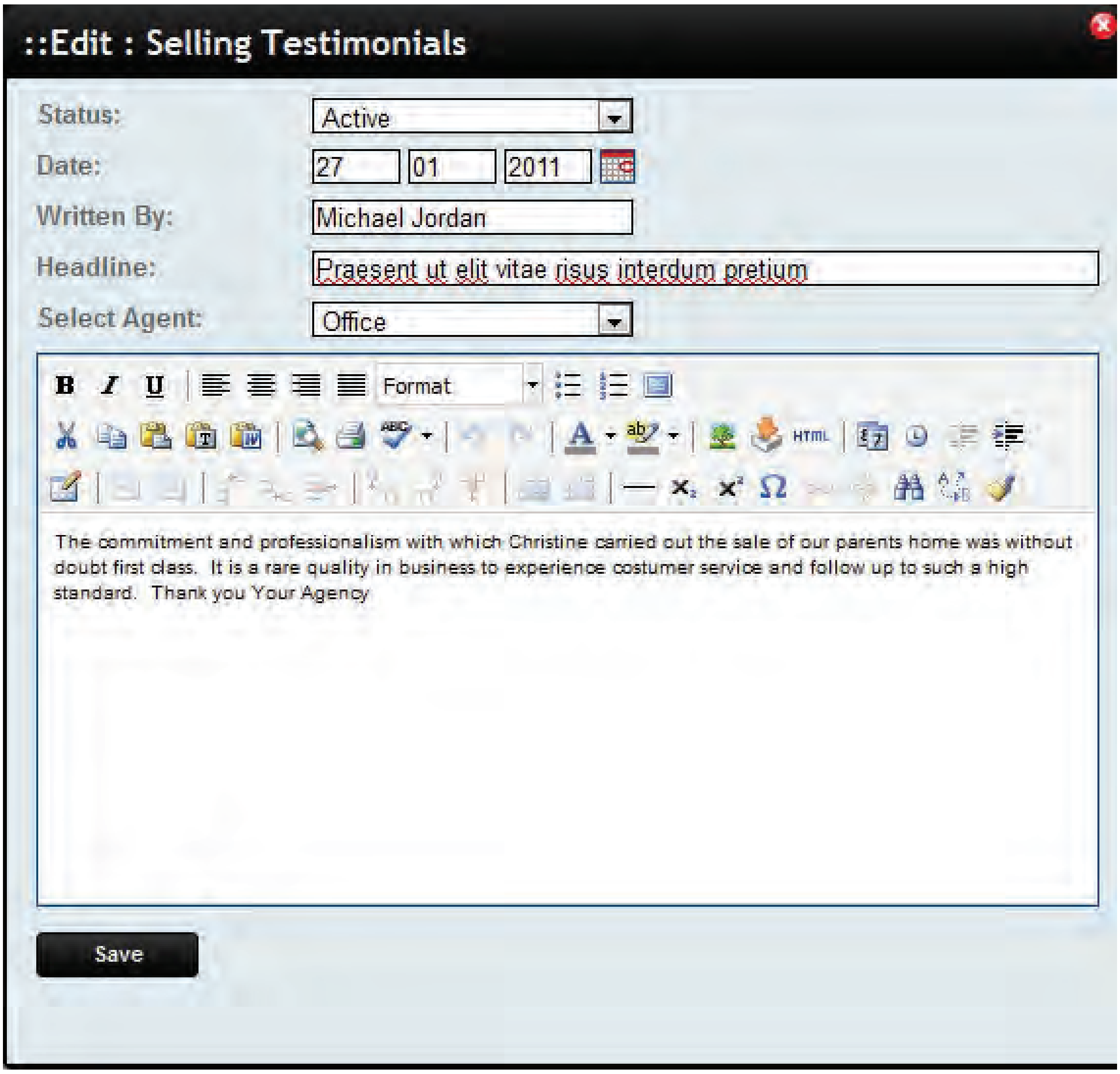
2. Click on the Home Page from the left panel and the page will open in a centre panel



3. Click the yellow shading and the edit panel will appear.



4. You can add a testimonial to the office or a staff member by specifying in the drop down menu before clicking Add.
or you can edit an existing testimonial by clicking on the date.



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?

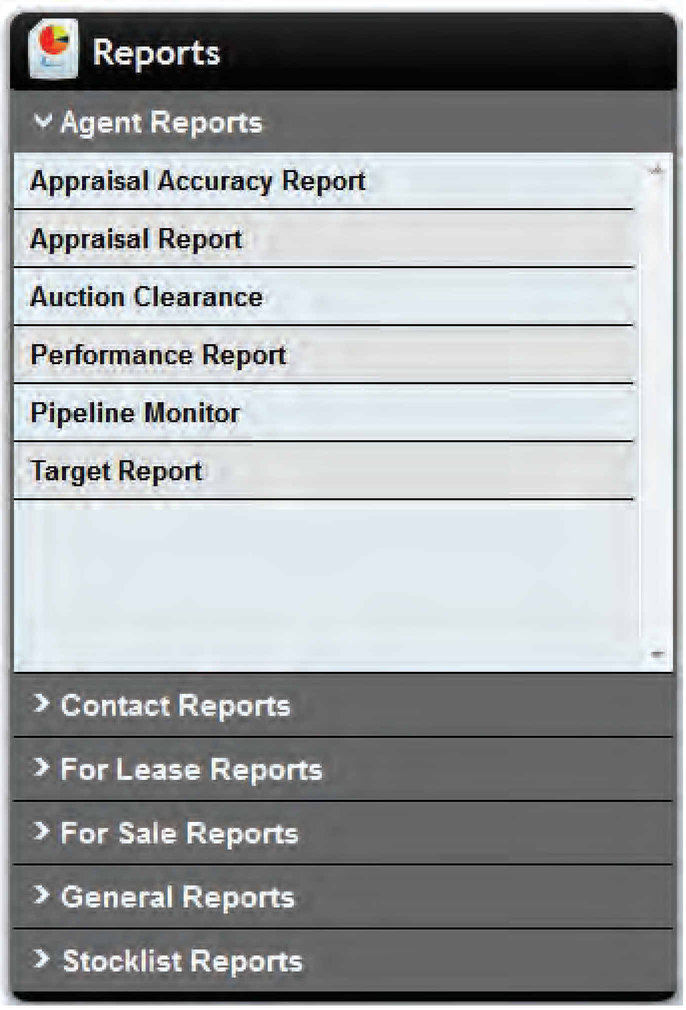
You might also like...
How do I print a detailed property report?
How do I print a detailed contact report?

View & Generate Reports

How do I view and generate reports?

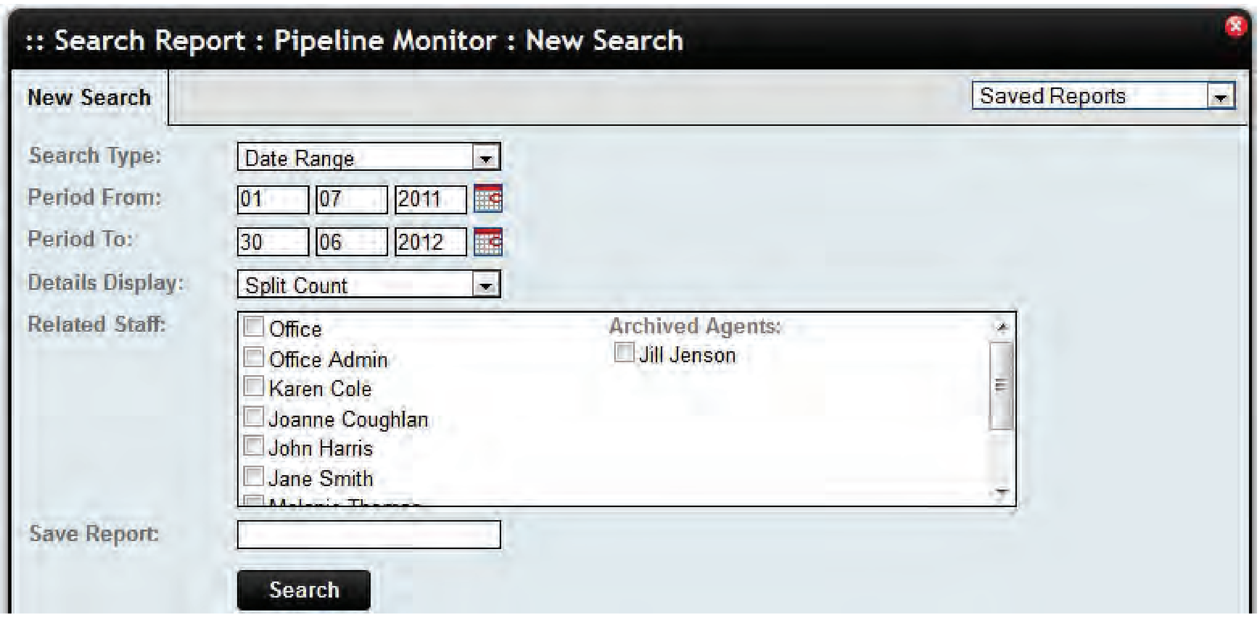
1. Click on Reports from the main menu

2. Click on a Report Category on the left panel e.g. Agent Reports



3. Click on the report you would like to create e.g. Pipeline Monitor

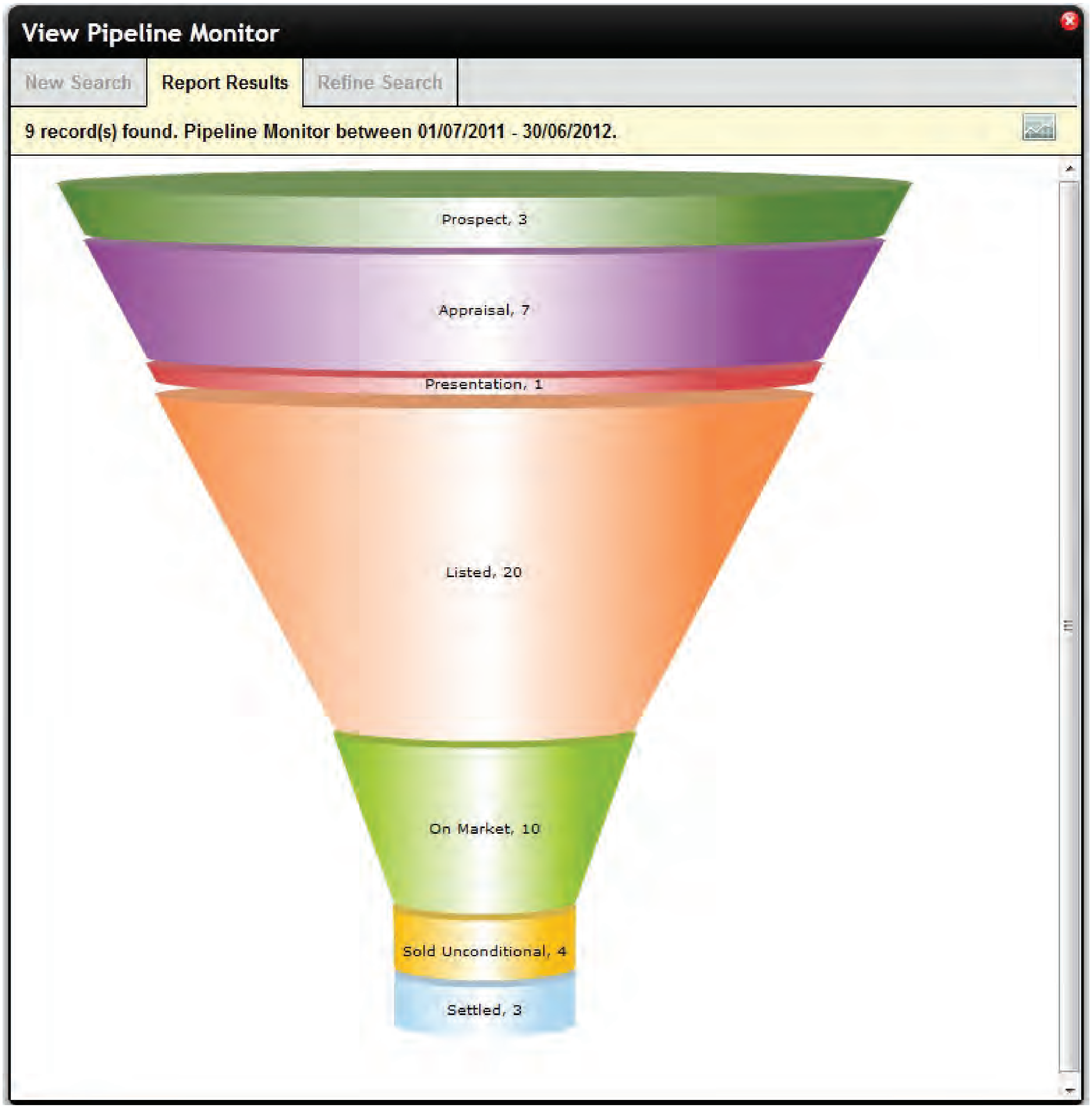
4. Select a date range, related staff member and enter name of the report if you wish to save it.



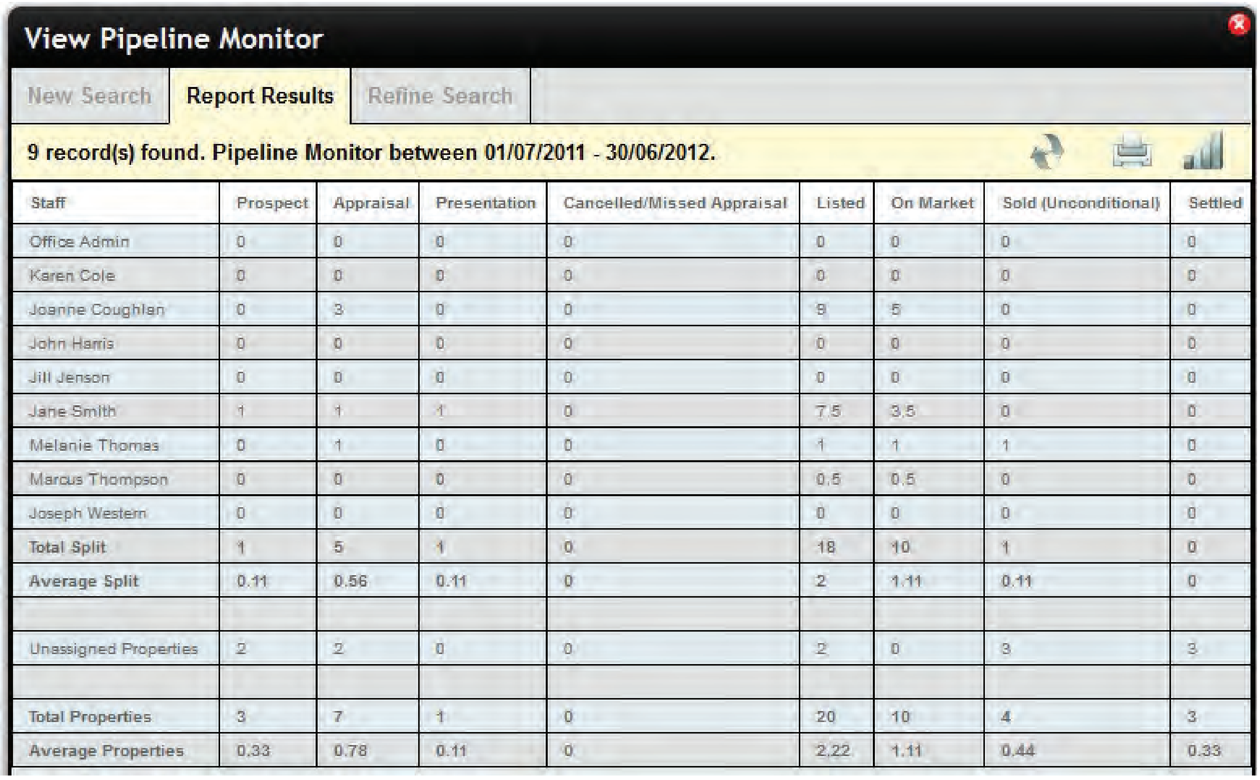
5. Click on 'Search'

6. The results or graph will appear.

**Note: You can re-size the results window by dragging the corners of the panel.*



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



View Pipeline Monitor

New Search | Report Results | Refine Search

9 record(s) found. Pipeline Monitor between 01/07/2011 - 30/06/2012.

Staff	Prospect	Appraisal	Presentation	Cancelled/Missed Appraisal	Listed	On Market	Sold (Unconditional)	Settled
Office Admin	0	0	0	0	0	0	0	0
Karen Cole	0	0	0	0	0	0	0	0
Joanne Coughlan	0	3	0	0	9	5	0	0
John Harris	0	0	0	0	0	0	0	0
Jill Jenson	0	0	0	0	0	0	0	0
Jane Smith	1	1	1	0	7.5	3.5	0	0
Melanie Thomas	0	1	0	0	1	1	1	0
Marcus Thompson	0	0	0	0	0.5	0.5	0	0
Joseph Western	0	0	0	0	0	0	0	0
Total Split	1	5	1	0	18	10	1	0
Average Split	0.11	0.56	0.11	0	2	1.11	0.11	0
Unassigned Properties	2	2	0	0	2	0	3	3
Total Properties	3	7	1	0	20	10	4	3
Average Properties	0.33	0.78	0.11	0	2.22	1.11	0.44	0.33

8. You can now use the action icons  to export your report to a CSV, Print to a PDF or view the data as a Graph, respectively.

Generate Property Stocklist

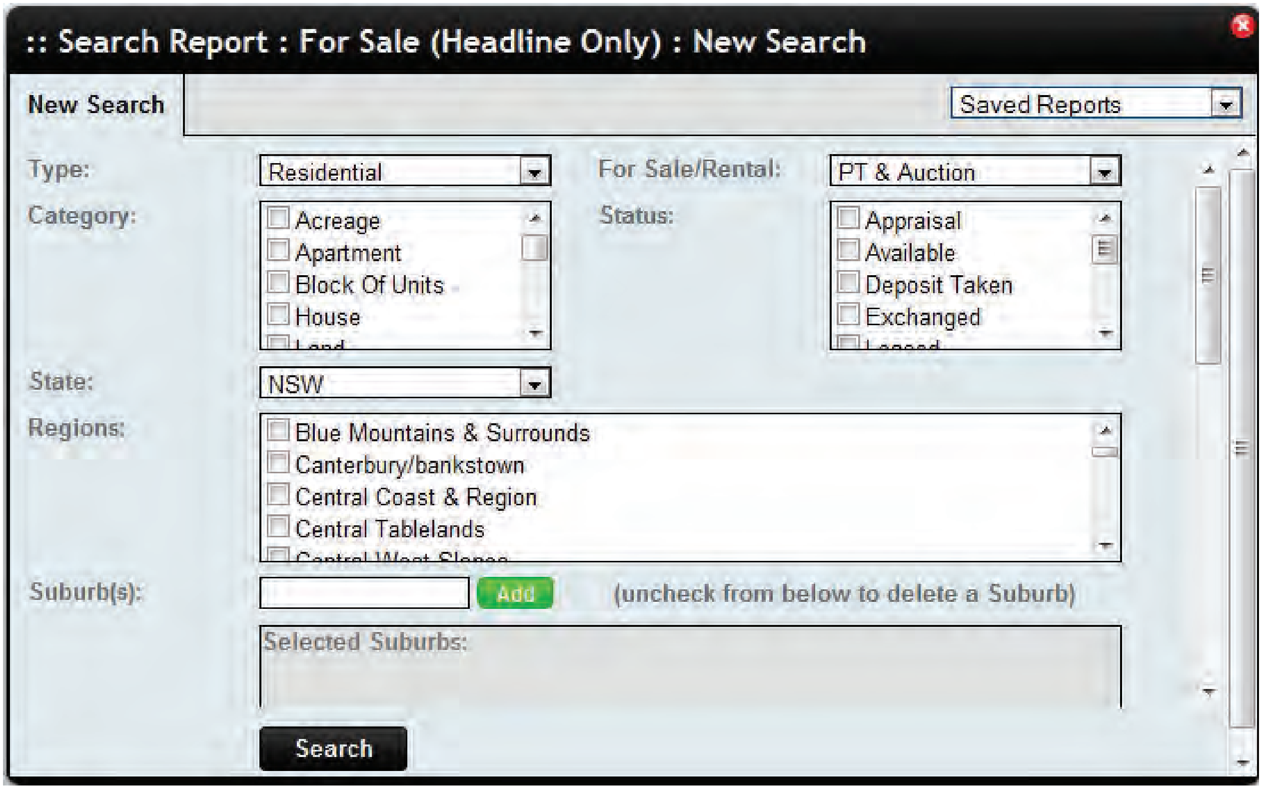
How do I generate a Property Stocklist?

1. Click on the Reports icon from the Main Menu

2. Click on the Stock list Reports category

3. Select the report you wish to generate.
**Note: If you would like to customise the design and content of this report please contact us at support@agentbox.com.au for a quote.*

4. Enter search requirements you wish to use to refine your Stocklist.



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

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

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

For Sale

04 April, 2012

COPACABANA, 1 Jones Street

LUXURY BALINESE INSPIRED RESIDENCE

bed 3 bath 4 car 2

Don't miss out on this one! Relax in your open plan living area,opening onto an outdoor entertaining area overlooking the infinity pool and breathtaking ocean view s. Three large bedrooms, all contain en suites and built in w ardrobes, the master features 270 degrees of

Contact Agent Jane Smith | 0400000000

COPACABANA, Unit 6/12 Del Rio Drive

OASIS BY THE SEA

bed 3 bath 2 car 2

AUCTION | Thu 20/10/2011 1:00pm

Low maintenance living is ensured in this superbly appointed, large 3 bedroom luxury penthouse apartment. Stunning view s 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 | 0400000000

MANLY, Unit 6/13 Stuart Street

OASIS BY THE SEA

bed 2 bath 1 car 2

Low maintenance living is ensured in this superbly appointed, large 3 bedroom luxury penthouse apartment. Stunning view s 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 w ith generous proportions and appealing interiors, this family home has been renovated throughout and extends through to a beautiful open plan living area w ith modern kitchen. Here you can

$1,000,000 Joanne Coughlan | 0403 194 706

SURRY HILLS, 52 Elizabeth Street

ENTERTAINERS' RETREAT WITH SUPERB HARBOUR

bed 3 bath 2 car 1

Created to provide a relaxed haven for the entertainer, this immaculate home offers an easycare residence w ith superb harbour view s. It combines flow ing interiors, sunlit outdoor areas and quality finishes to deliver a property of charm and style. Generous living spaces

$1.65mil Marcus Thompson

SYDNEY, 654 Victoria Street

LARGE FAMILY HOME

bed 4 bath 2 car 2

Large living area w ith stunning 280 degree view s. To die for location surrounded by the hustle and bustle of the city below in its ow n tranquil serenity.

$2,250,000 Marcus Thompson

Performance

Performance

In Performance a Master or Principal User can view a snapshot of actual verse target data at an individual agent or total office level.
A standard user can view only their target verse actual data.

- Every metric has a drill down report (click on the metric title) & accompanying graph (Click graph icon ) with the ability to layer comparison metrics
- You can view relevant metrics by Financial Year, Calendar Year, specific month and includes both totals and agent split e.g. total sales (agent involved) and total sales (attributable to agent)

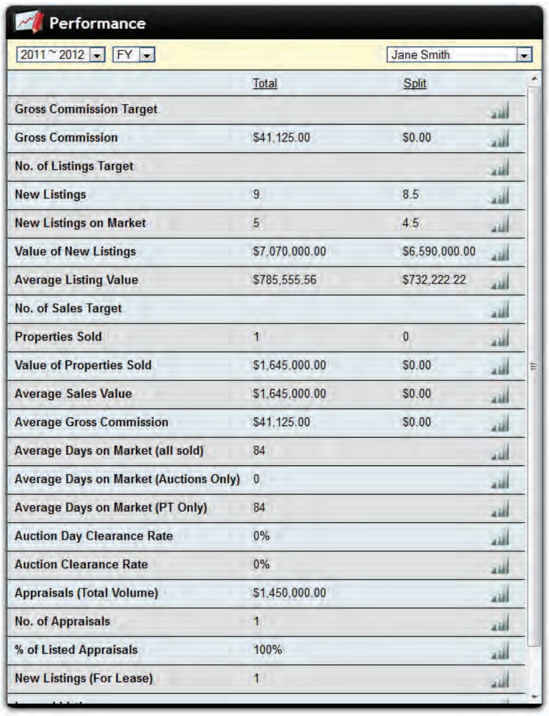
How do I view my office and agent performance?

View Performance

How do I view my office and agent performance?

1. Click on Performance from the Main Menu

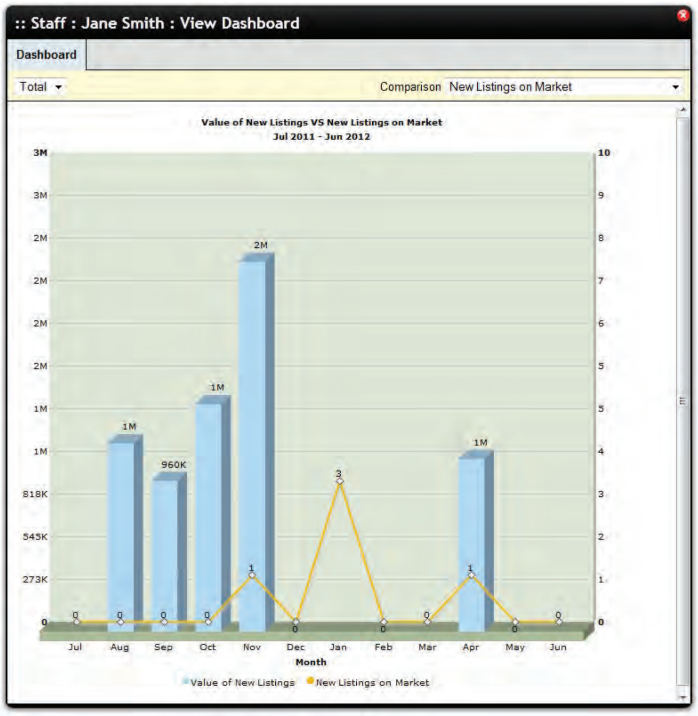
2. Select the financial year and office or relevant staff member from the drop down menus on the left panel.
3.Every metric has a drill down report (click on the metric title) & accompanying graph (Click graph icon
) with the ability to layer comparison metrics



Performance

2011 ~ 2012 | FY | Jane Smith

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



Portals

Portals

[How do I go about setting up a new portal feed for the office?](#)
[How can I check whether my property has successfully uploaded or updated on the portal?](#)
[What do I do if my property is not appearing on the portal?](#)

New Portal Set Up

Available Portals

Click on the portal to view the relevant steps to activate this service, if you have any additional requirements or the portal is not listed here please contact support@agentbox.com.au

- Allhomes
- Campaign Track
- Commercial Real Estate
- Domain
- Home Away
- Homehound.com.au
- Homes247.com.au
- Homesguide.com.au
- Jewish Living
- Realestate.com.au
- Realcommercial.com.au
- Realestateview.com.au
- REIQ (Realestate Institute of Queensland)
- REIWA (Realestate Institute of Western Australia)
- Rent.com.au
- Rentfind.com.au
- (Realestate Publications Australia (repa.com.au, Homes Pictorial, Property Showcase)
- Stayz
- The Homepage & MillonPlus
- Trade Me (New Zealand)

You might also be interested in our REST Professional Integration

All Homes

Allhomes.com.au

1. Please ensure you have an active account or set one up with allhomes.com.au direct.

2. Email info@allhomes.com.au and cc support@agentbox.com.au requesting that Agentbox be the new XML uploader for your office commencing immediately.

3. Allhomes.com.au will then contact us direct with the activation details.

4. Once this portal is activated, you will receive an email from us confirming all listings will now be updated directly through Agentbox, and no further use of your previous provider or manual data entry through allhomes.com.au is required.

Campaign Track

Campaign Track

1. Please check your Agentbox agreement for any additional portal charges that may be payable before activating this service.

2. Contact your account manager at Campaign Track requesting that Agentbox be the new XML uploader for your office commencing immediately and cc support@agentbox.com.au

3. Campaign Track will issue your office access codes, if these are sent directly to you please forward to support@agentbox.com.au

4. Once this portal is set up you will receive an email confirming this feature has been set up and you can begin giving staff access through the Access tab in the Staff Profile Card.

Commercial Real Estate

CommercialRealestate.com.au

1. Portal feeds to CommercialRealestate.com.au go through your domain.com.au subscription with Agentbox. No additional portal charges apply.

2. Contact support@commercialrealestate.com.au or your domain.com.au account manager to confirm your subscription is linked to domain.com.au or to create a new account.

3. If you have activated your portal feed to domain.com.au from Agentbox no further steps are needed.

4. If you have not activated your domain.com.au portal feed from Agentbox please follow the following steps.

> **Domain.com.au**
> 1. Please check your Agentbox agreement for any additional portal charges that may be payable before activating this service.
> 2. If you wish to export your properties to domain.com.au, email sales@domain.com.au and cc support@agentbox.com.au requesting that Agentbox be the new XML uploader for your office commencing immediately.
> 3. Domain will switch off all your products temporarily (such as priority placements) for the switch over to occur. Once this is done then they will turn the products back on. This will prevent any additional charges for the fresh upload.
> 4. Once this portal is set up at Agentbox, you will receive an email to confirm that your listings will be updated through Agentbox, and no further use of your previous provider is required.

Domain

Domain.com.au

1. Please check your Agentbox agreement for any additional portal charges that may be payable before activating this service.

2. If you wish to export your properties to domain.com.au, email sales@domain.com.au and cc support@agentbox.com.au requesting that Agentbox be the new XML uploader for your office commencing immediately.

3. Domain will switch off all your products temporarily (such as priority placements) for the switch over to occur. Once this is done then they will turn the products back on. This will prevent any additional charges for the fresh upload.

4. Once this portal is set up at Agentbox, you will receive an email to confirm that your listings will be updated through Agentbox, and no further use of your previous provider is required.

Home Away

HomeAway.com.au

1. Please check your Agentbox agreement for any additional portal charges that may be payable before activating this service.

2. If you wish to export your properties to HomeAway.com.au, please email your account manager or info@homeaway.com.au and cc support@agentbox.com.au requesting that Agentbox be the new XML

uploader for your office commencing immediately.

3. HomeAway will then contact us with the relevant set up details.

4. Once this portal is set up by Agentbox, you will receive an email to confirm that your listings will be updated through Agentbox, and no further use of your previous provider is required.

Homehound.com.au

Homehound.com.au

1. Please check your Agentbox agreement for any additional portal charges that may be payable before activating this service.

2. Ensure you have an active account or set one up with homehound.com.au by visiting their website.

3. Email support@agentbox.com.au requesting that Agentbox be the new XML uploader for your office commencing immediately.

4. Agentbox will then forward your request to homehound.com.au to complete the set-up process.

5. Once this portal is set up, you will receive an email from us confirming your listings will be updated through Agentbox, and no further use of your previous provider is required.

Homes247.com.au

Homes247.com.au

1. Please check your Agentbox agreement for any additional portal charges that may be payable before activating this service.

2. If you wish to export your properties to homes247.com.au, please email your account manager or info@homes247.com.au and cc support@agentbox.com.au requesting that Agentbox be the new XML uploader for your office commencing immediately.

3. Homes247 will then contact us with the relevant set up details.

4. Once this portal is set up by Agentbox, you will receive an email to confirm that your listings will be updated through Agentbox, and no further use of your previous provider is required.

Homesguide.com.au

Homesguide.com.au

1. Please check your Agentbox agreement for any additional portal charges that may be payable before activating this service.

2. If you wish to export your properties to homesguide.com.au, please email your account manager or info@homesguide.com.au and cc support@agentbox.com.au requesting that Agentbox be the new XML uploader for your office commencing immediately.

3. Homesguide will then contact us with the relevant set up details.

4. Once this portal is set up by Agentbox, you will receive an email to confirm that your listings will be updated through Agentbox, and no further use of your previous provider is required.

Jewish Living

Jewish Living

1) If you wish to export your properties to Jewishliving.com.au, please email your account manager or info@jewishliving.com.au and cc support@agentbox.com.au requesting that Agentbox be the new XML uploader for your office commencing immediately.

2) Jewish Living will then contact us with the relevant set up details.

3) Once this portal is set up by Agentbox, you will receive an email to confirm that your listings will be updated through Agentbox, and no further use of your previous provider is required.

Realestate.com.au

Realestate.com.au

1. If you wish to export your properties to realestate.com, please FAX the attached form to realestate.com.au, at 1300 134 554.

2. You should call your account manager to let them know you have faxed the form.

3. If you do not receive a reply within 48hours, please contact your account manager at realestate.com.au for a status update.

4. During this time please keep track of any manual changes you make to your listings on realestate.com.au as any made after they have sent the initial data to us may need to be updated again in your Agentbox CRM again on activation.

5. Once this portal is set up at Agentbox, you will receive an email to confirm that your listings will be updated through Agentbox, and no further use of you previous provider is required.

RealCommercial.com.au

RealCommercial.com.au

1. Portal feeds to realcommercial.com.au go through your realestate.com.au subscription with Agentbox. No additional portal charges apply.

2. Contact your realestate.com.au account manager to confirm you are subscribed to realcommercial.com.au

3. If you have activated your portal feed to realestate.com.au from Agentbox no further steps are needed.

4. If you have not activated your realestate.com.au portal feed from Agentbox please follow the following steps.

> **Realestate.com.au**
> 1. If you wish to export your properties to realestate.com, please FAX the attached form to realestate.com.au, at 1300 134 554.
> 2. You should call your account manager to let them know you have faxed the form.
> 3. If you do not receive a reply within 48hours, please contact your account manager at realestate.com.au for a status update.
> 4. During this time please keep track of any manual changes you make to your listings on realestate.com.au as any made after they have sent the initial data to us may need to be updated again in your Agentbox CRM again on activation.
> 5. Once this portal is set up at Agent Box, you will receive an email to confirm that your listings will be updated through Agent Box, and no further use of you previous provider is required.

5. Realestate.com.au will automatically send any listings marked as ‘Commercial' to the realcommercial.com.au website.

6. Once this portal is set up at Agent Box, you will receive an email to confirm that your listings will be updated through Agent Box, and no further use of you previous provider is required.

Realestateview.com.au

Realestateview.com.au

1. Please check your Agentbox agreement for any additional portal charges that may be payable before activating

2. If you wish to export your properties to Realestateview.com.au, please email your account manager or support@realestateview.com.au and cc support@agentbox.com.au requesting that Agentbox be the new XML uploader for your office commencing immediately.

3. Realestateview will then contact us with the relevant set up details.

4. Once this portal is set up by Agentbox, you will receive an email to confirm that your listings will be updated through Agentbox, and no further use of your previous provider is required.

REIQ

The Real Estate Institute of QLD

1. Ensure you have an active subscription with REIQ.com.au, the process for subscribing can be found here.

2. If you wish to export your properties to www.reiq.com.au, please email your account manager or busserv@reiq.com.au and cc support@agentbox.com.au requesting that Agentbox be the new XML uploader for your office commencing immediately.

3. REIQ will then contact us with the relevant set up details.

4. Once this portal is activated by Agentbox, you will receive an email to confirm that your listings will be updated through Agentbox, and no further use of your previous provider is required.

REIWA

The Real Estate Institute of Western Australia

1) If you wish to export your properties to www.reiwa.com.au, please email your account manager or support@reiwa.com.au and cc support@agentbox.com.au requesting that Agentbox be the new XML uploader for your office commencing immediately.

3) REIWA will then contact us with the relevant set up details.

4) Once this portal is activated by Agentbox, you will receive an email to confirm that your listings will be updated through Agentbox, and no further use of your previous provider is required.

Rent.com.au

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.

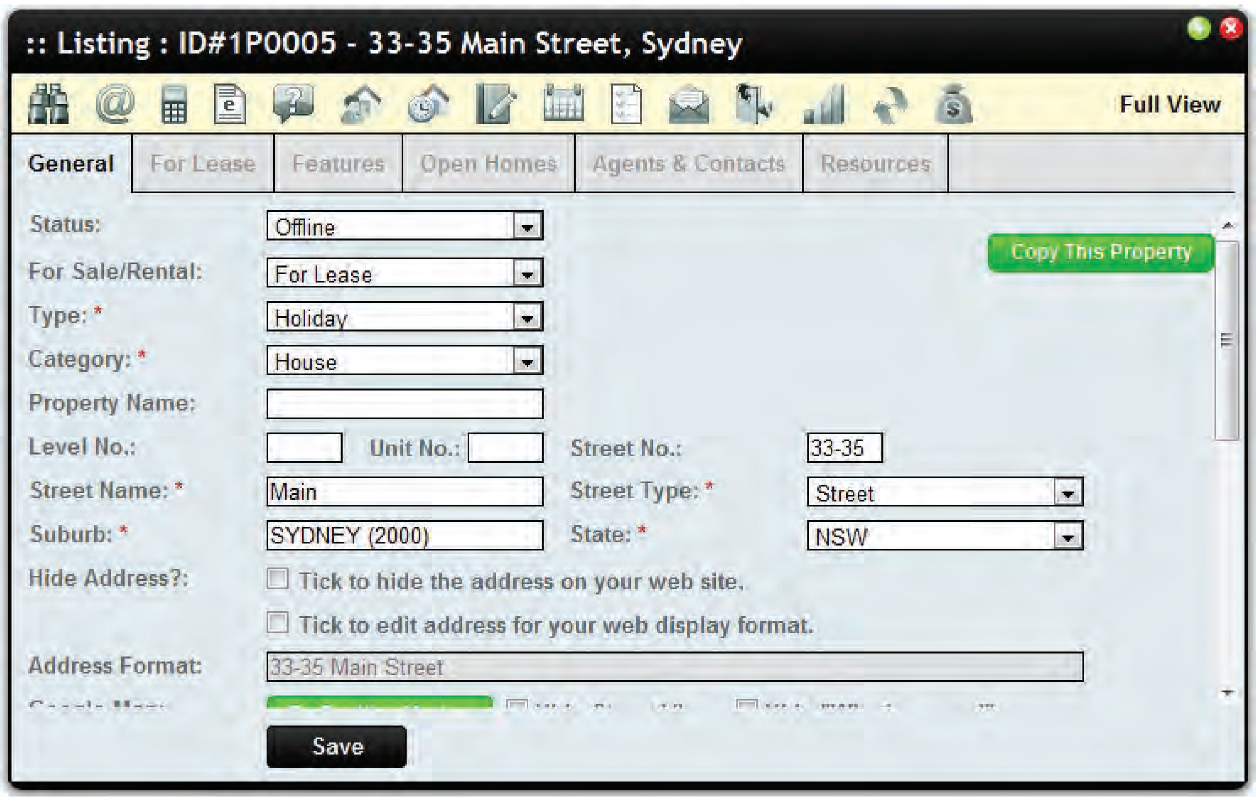
Portal Feed Logs

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.*

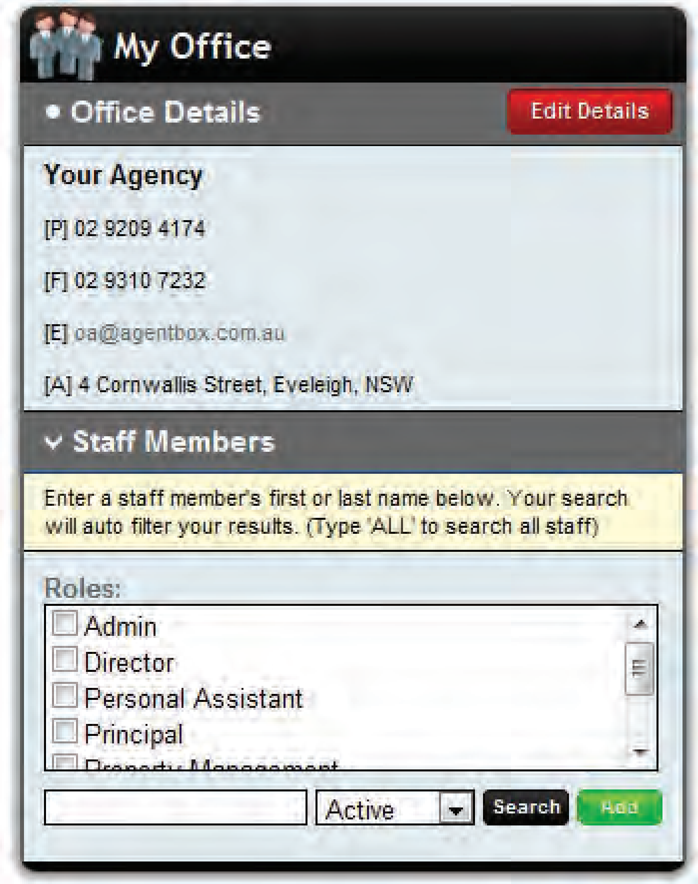
1. Search for your Property and open the Property Card

2. You can check the portal feed logs for a property by clicking the portal feed action icon 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.

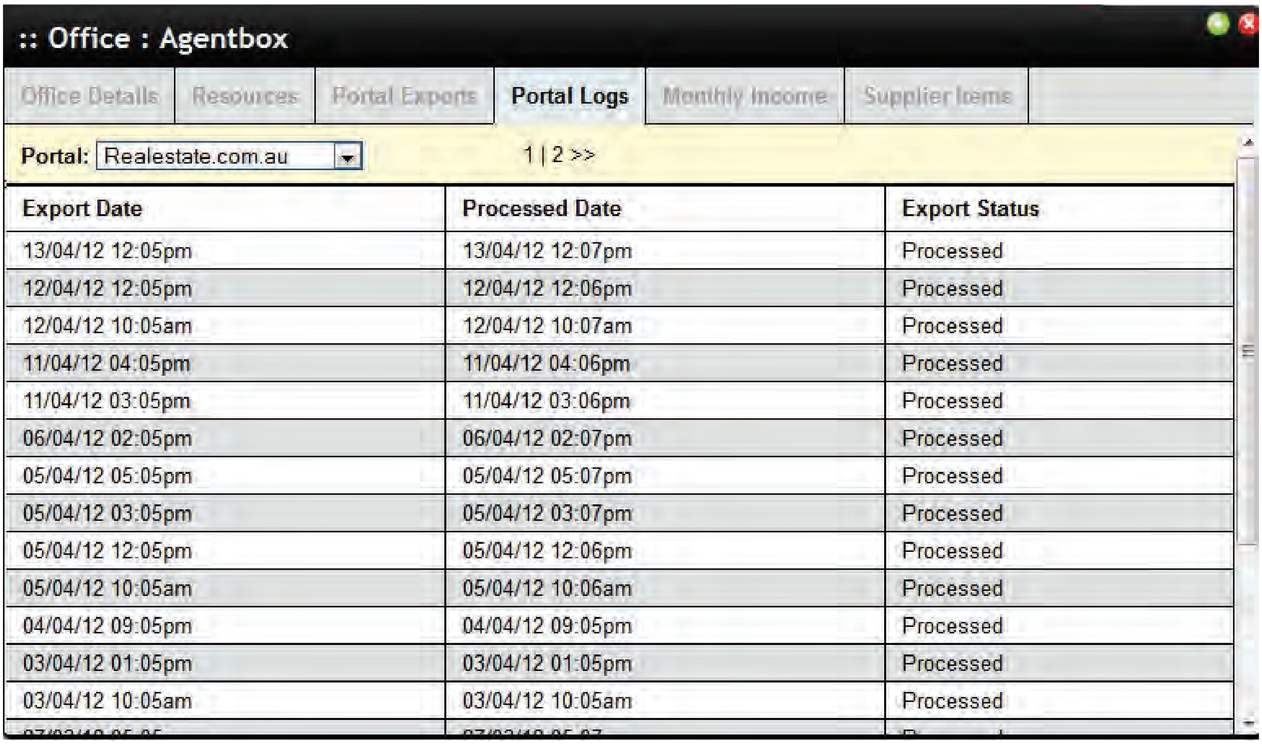


3. Alternatively you can access the portal logs by clicking on My Office from the main menu.

2. Click the red Edit Details button on the Left Panel



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

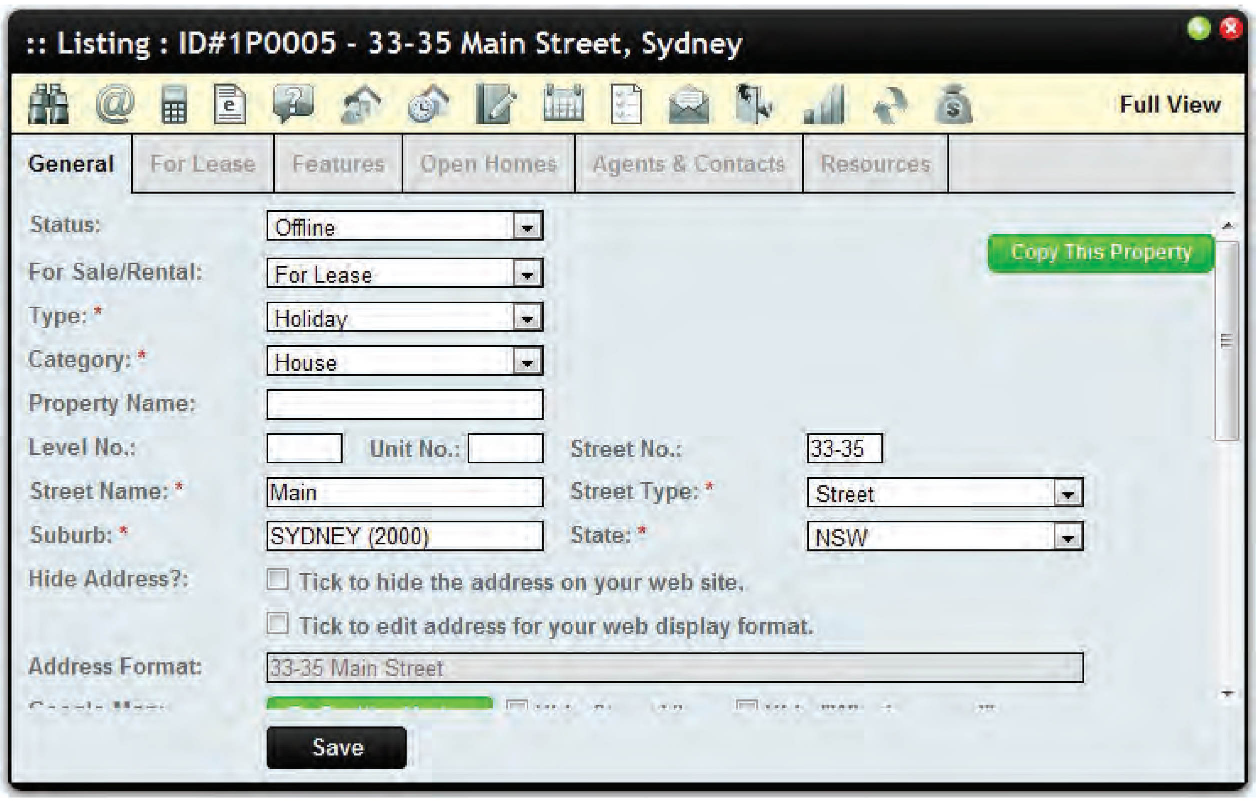


Export Date	Processed Date	Export Status
13/04/12 12:05pm	13/04/12 12:07pm	Processed
12/04/12 12:05pm	12/04/12 12:06pm	Processed
12/04/12 10:05am	12/04/12 10:07am	Processed
11/04/12 04:05pm	11/04/12 04:06pm	Processed
11/04/12 03:05pm	11/04/12 03:06pm	Processed
06/04/12 02:05pm	06/04/12 02:07pm	Processed
05/04/12 05:05pm	05/04/12 05:07pm	Processed
05/04/12 03:05pm	05/04/12 03:07pm	Processed
05/04/12 12:05pm	05/04/12 12:06pm	Processed
05/04/12 10:05am	05/04/12 10:06am	Processed
04/04/12 09:05pm	04/04/12 09:05pm	Processed
03/04/12 01:05pm	03/04/12 01:05pm	Processed
03/04/12 10:05am	03/04/12 10:05am	Processed

Portal Issues

My property is not appearing correctly on a portal?

1. You can check the portal feed logs (supported portals only) for a property by clicking the portal feed action icon  at the top of the property card. If there is an error message, make the required corrections to the property and hit save to resend to the portal.



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 website and portals as **available**
Under Contract – Property advertised on your website and portals as **under contract** (terminology is customisable on your website)
Exchanged – Conditional – Property advertised on your website and portals as **under contract** or **exchanged** (terminology is customisable on your website)
Exchanged – Unconditional Property advertised on your website and portals as **SOLD** – **using the Exchanged date as the 'sold date'**

Sold/Settled – Property remains advertised on your website and portals as **SOLD**

Letter Generator

Letter Generator

You can access the Letter Generator using the Letter Generator Action Icon on the property and contact card. You can create and edit letters and letter templates for single use and mail merges using the Letter Generator.

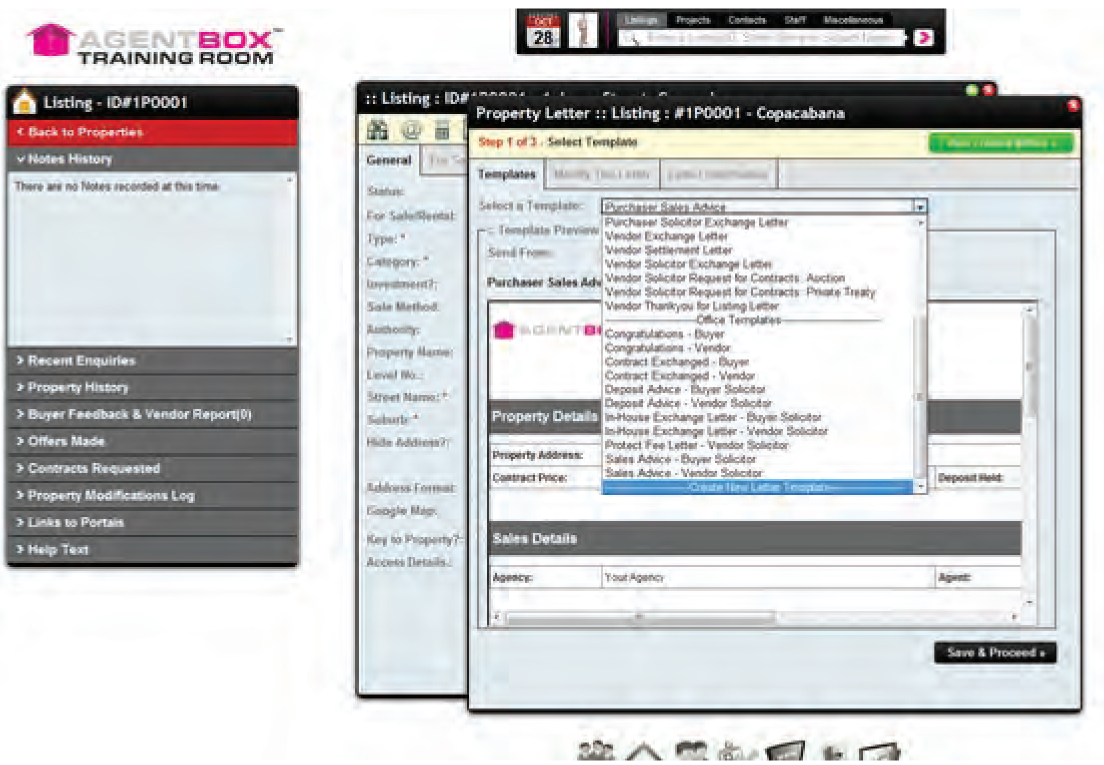
How do I create a Letter Template?
How do I copy a Letter Template?
How do I edit a Letter Template?
How do I delete a Letter Template?
How do I share a Letter Template to other staff?
How do I conduct a mail merge?

Create a Letter Template

How do I create a letter template?

1. Click on the Create Letter icon at the top of the contact or property card.

2. In the Select a Template drop down, scroll down and hit the Create New Letter Template button at the bottom of the list.

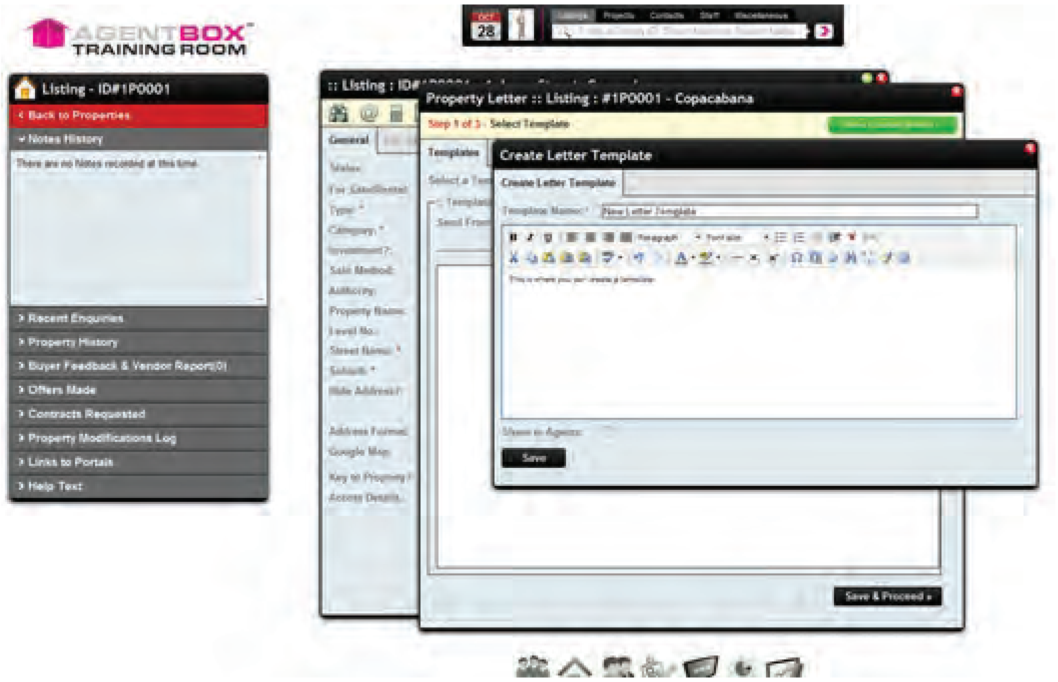


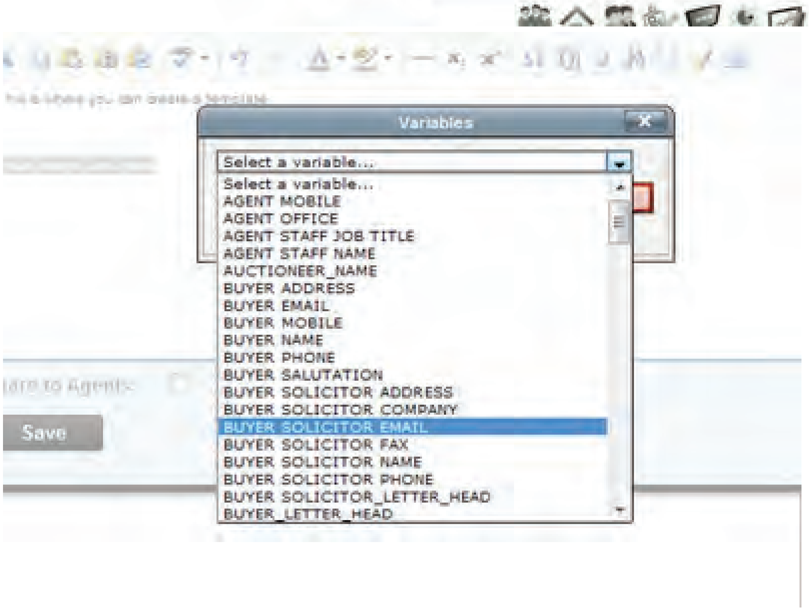
3. The Edit Letter Template window will appear which allows you to:
   - Name the template
   - Add/Edit the text in the template using the formatting tools. (If pasting from Microsoft

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

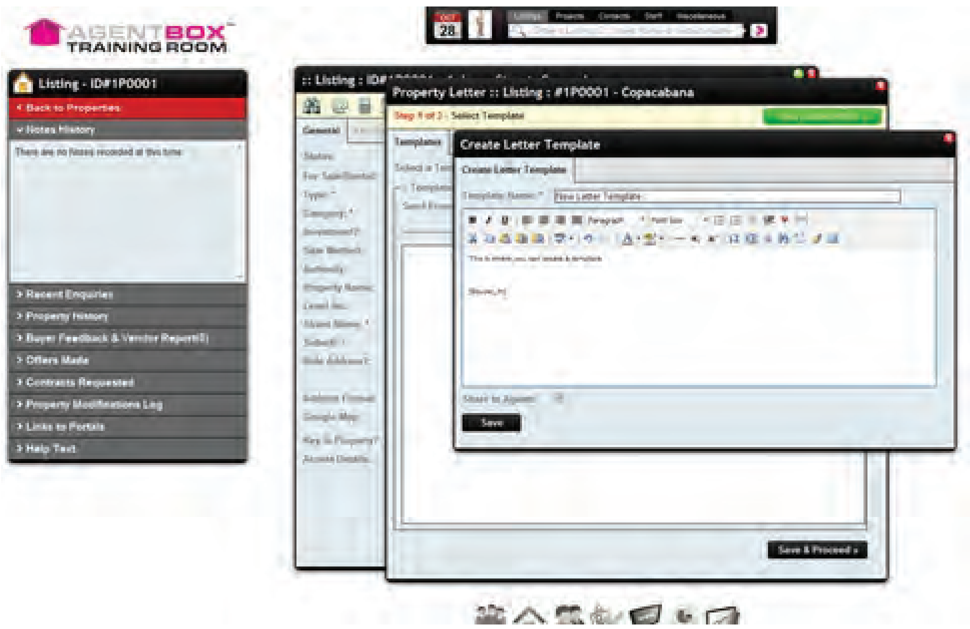
- Add/edit the variables using the red **V** icon.

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





4. Once you have finished creating the letter you are given the option of sharing the template. If you tick the Share to Agents checkbox, the letter template will be able to be viewed by anyone in the office. If this template is only for your own use, leave the checkbox empty and only you will be able to view the template.

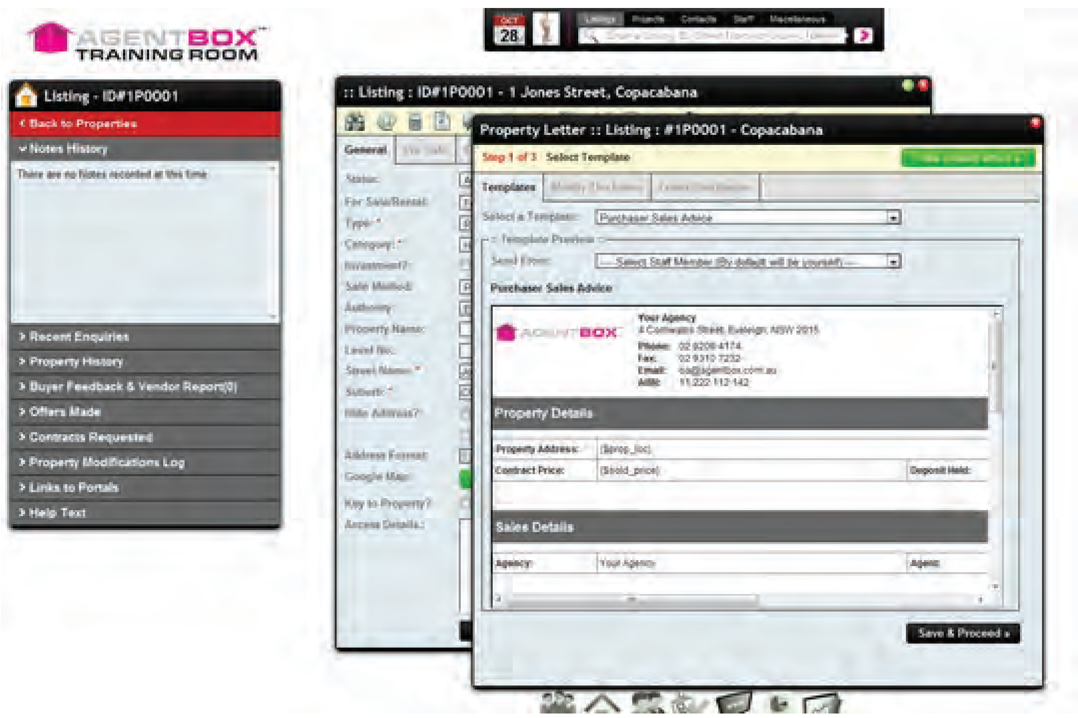


5. Lastly, click Save. You will be redirected back to the Select Template page and your newly created template can be selected from the drop down list.

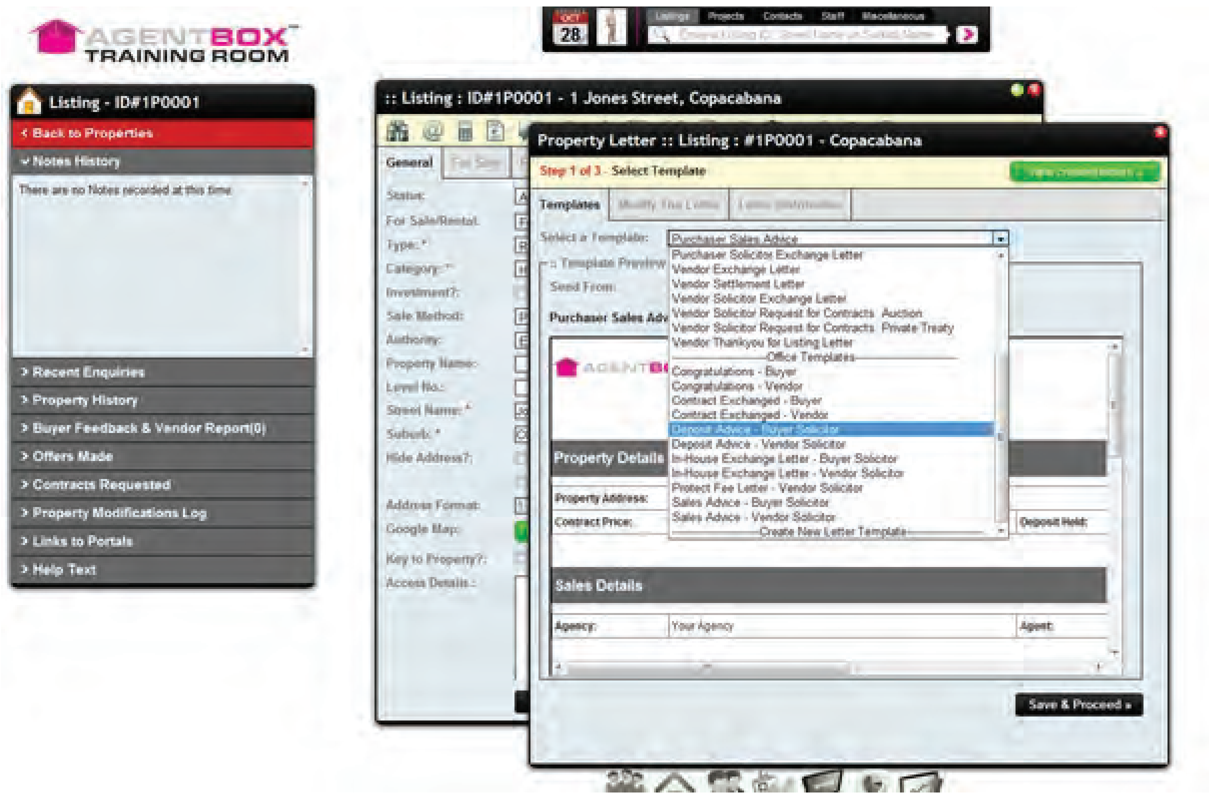
Copy a Letter Template

How do I copy an existing letter template?

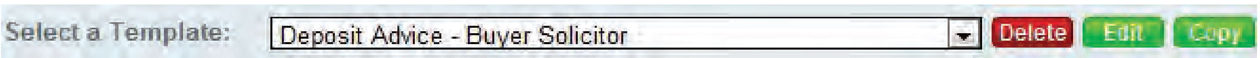
1. Click on the create letter icon  at the top of the contact or property card.

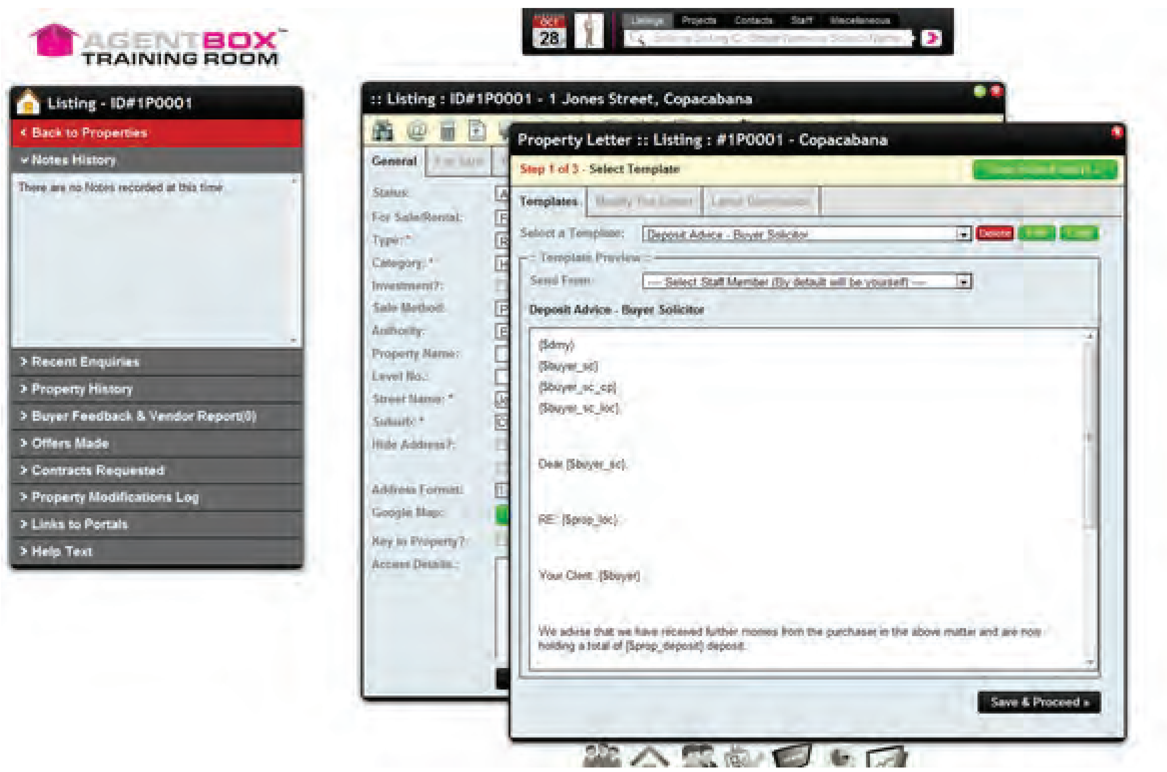


2. Click on the Select A Template drop down menu at the top of the panel and choose the template you would like to copy.



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

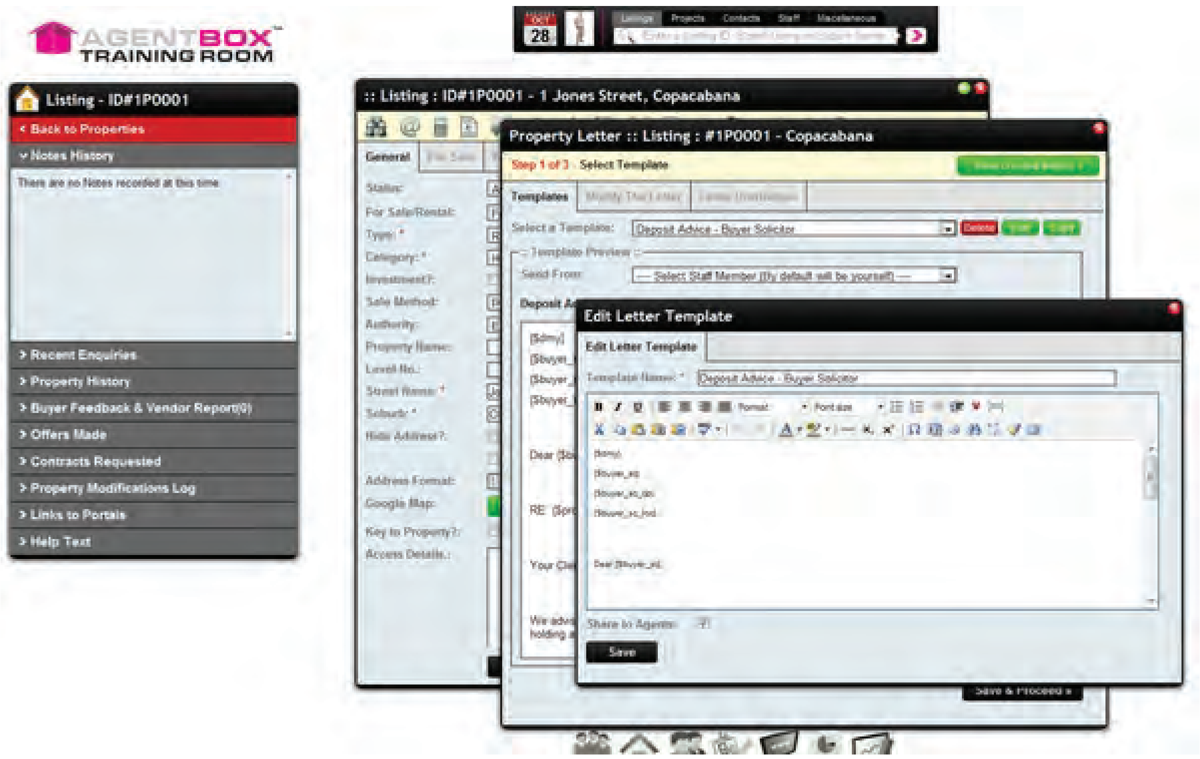




4. The Edit Letter Template window will appear which allows you to make alterations to:

- Rename the template
- Add/Edit the text in the template using the formatting tools. (if pasting from Microsoft Word, please use the paste from word tool)
- Add/edit the variables (merge fields) using the red V icon.

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



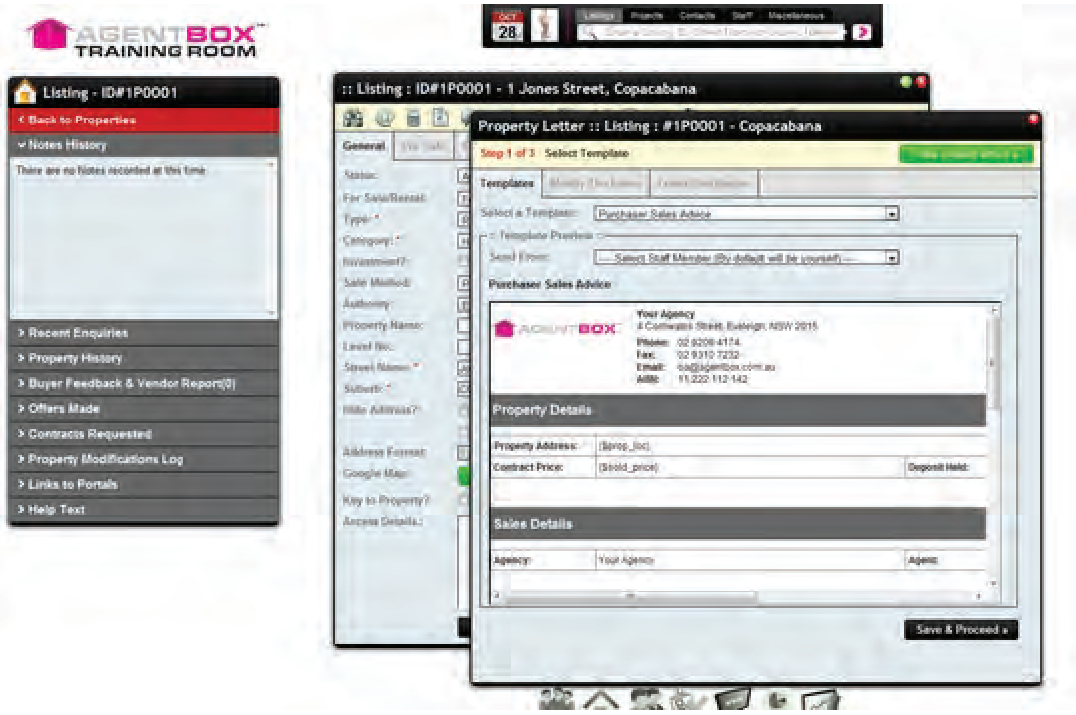
5. Once you have completed your editing, you can select whether or not to share this template with other agents or whether this edited version will be just for you by ticking the Share to Agents checkbox.

6. Lastly hit Save You will be redirected back to the Select Template page and your newly created template can be selected from the drop down list.

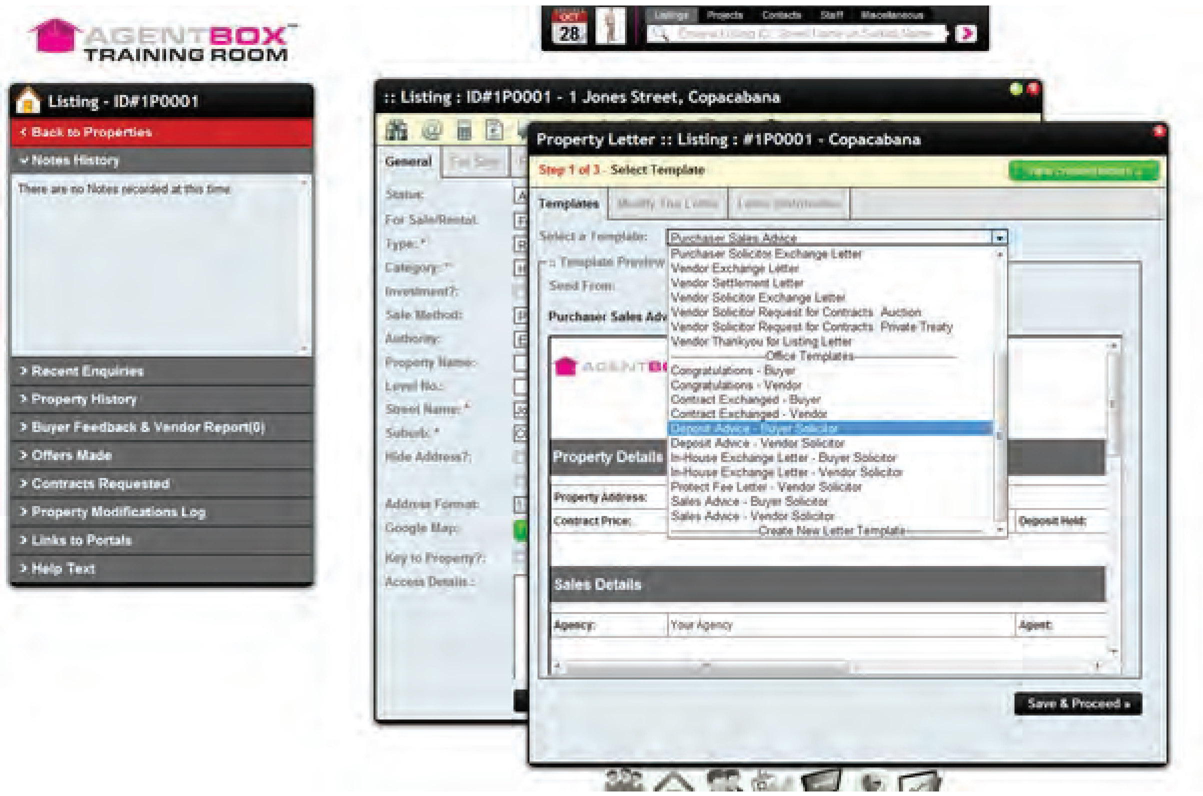
Edit a Letter Template

How do I modify/edit an existing letter template?

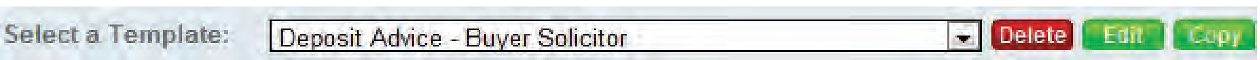
1. Click on the create letter icon at the top of the contact or property card. The Letter panel will pop-up.

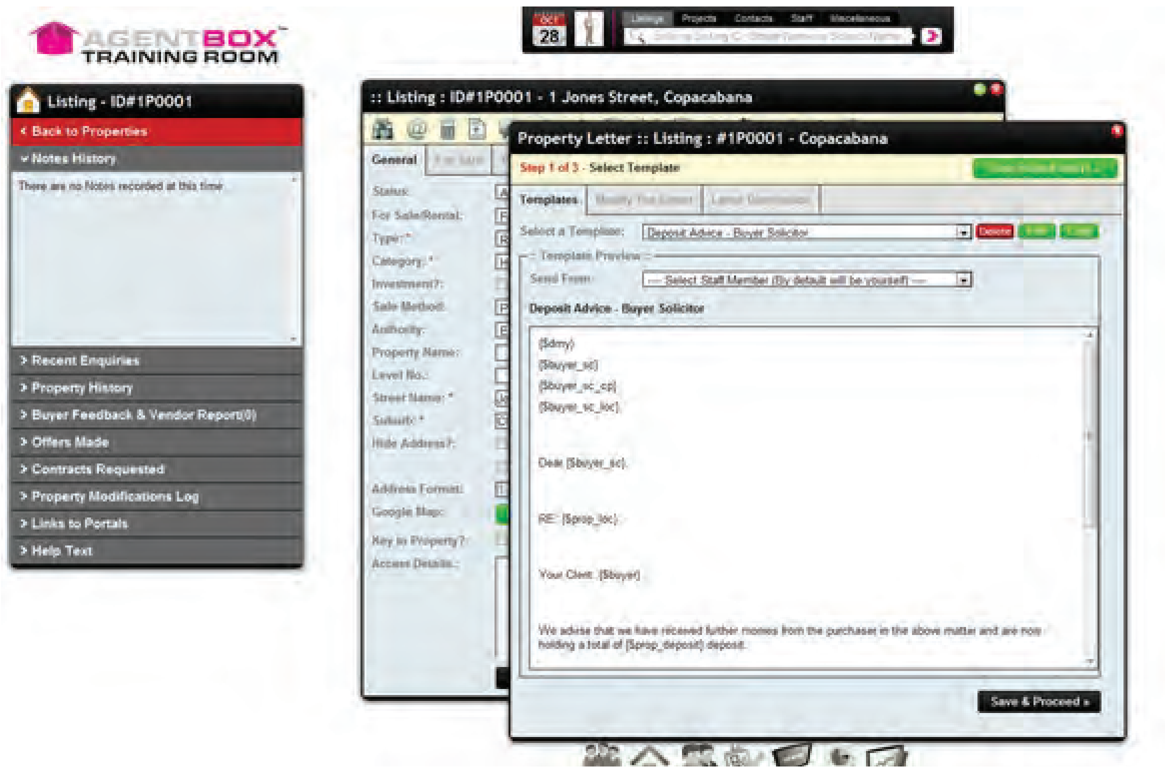


2. Click on the Select A Template drop down menu at the top of the panel and choose the template you would like to modify.



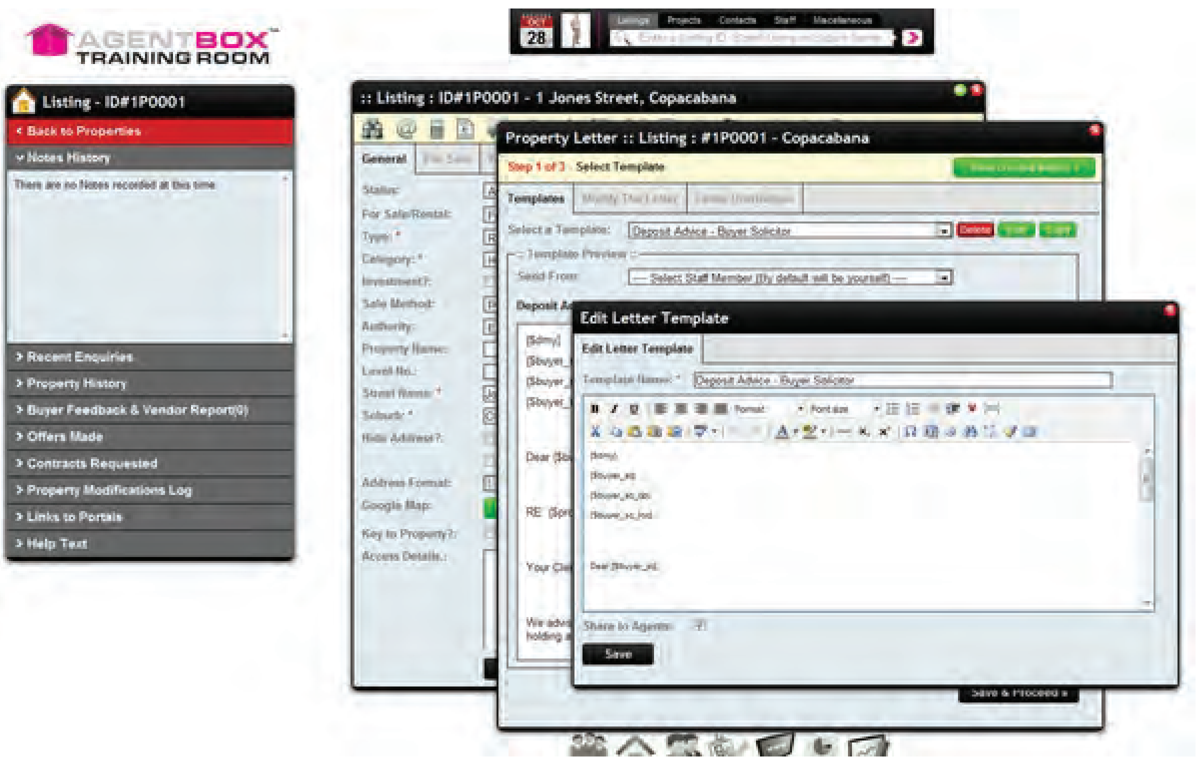
3. You will now be able to click a green Edit button to the right of the Select a Template drop down menu.





4. The Edit Letter Template window will appear which allows you to make alterations to:
   - Rename the template
   - Add/Edit the text in the template using the formatting tools. (if pasting from Microsoft Word, please use the paste from word tool )
   - Add/edit the variables (merge fields) using the red **V** icon.

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



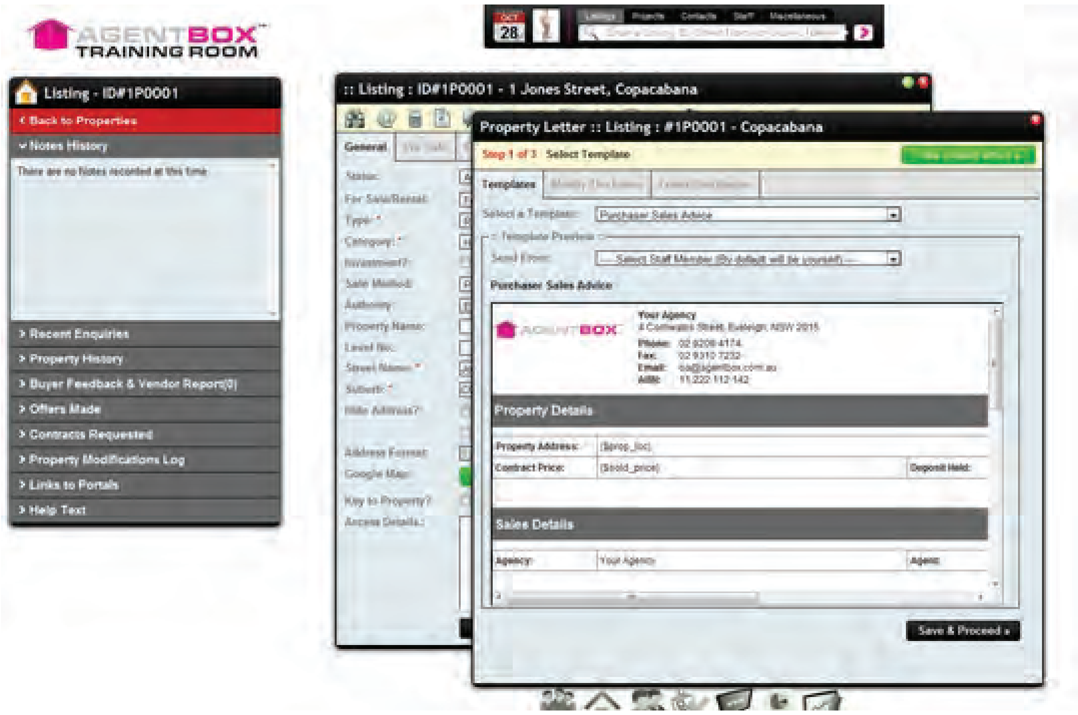
5. Once you have completed your editing, you can select whether or not to share this template with other agents or whether this edited version will be just for you by ticking the Share to Agents checkbox.

6. Lastly, hit Save. You will be redirected back to the Select Template page and your recently modified template can be selected from the drop down list.

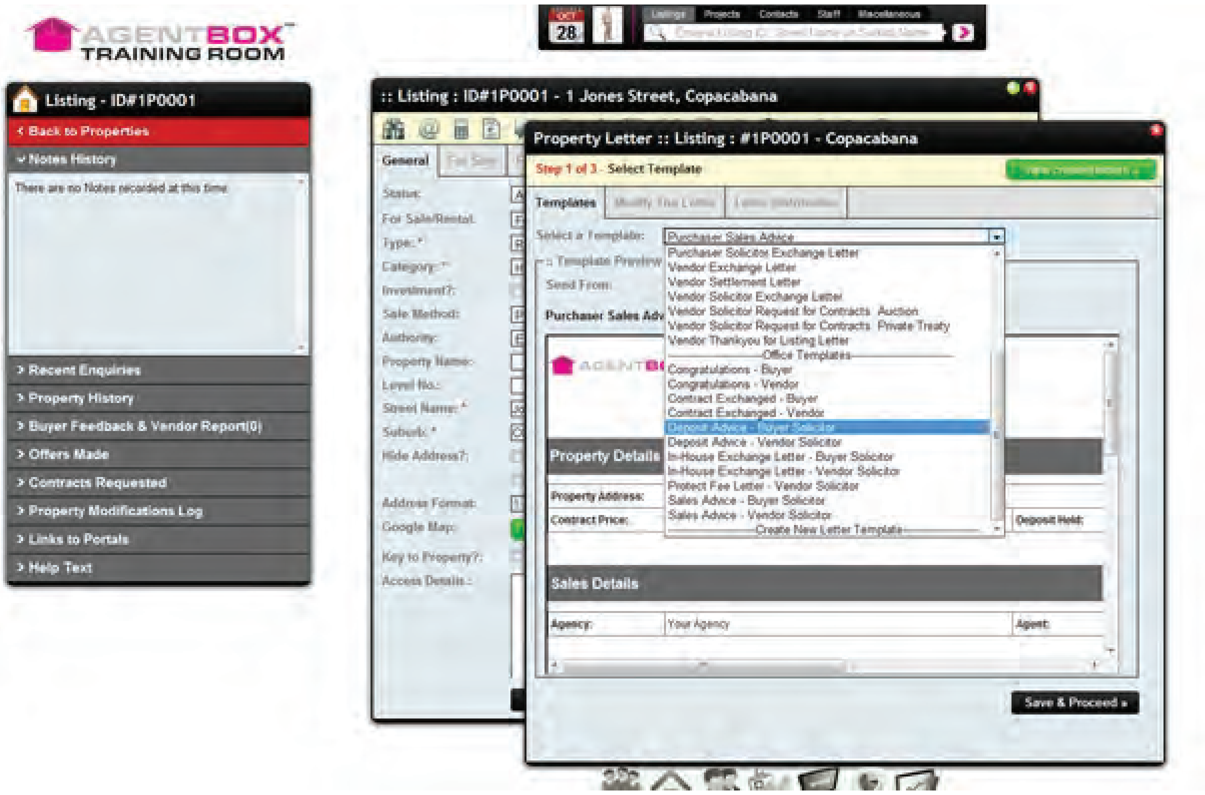
Delete a Letter Template

How do I delete a letter template?

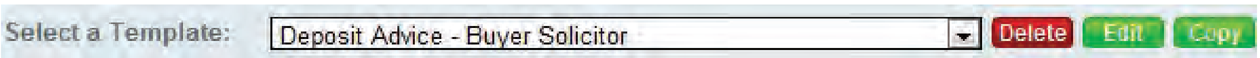
1. Click on the create letter icon at the top of the contact or property card. The Letter panel will pop-up.

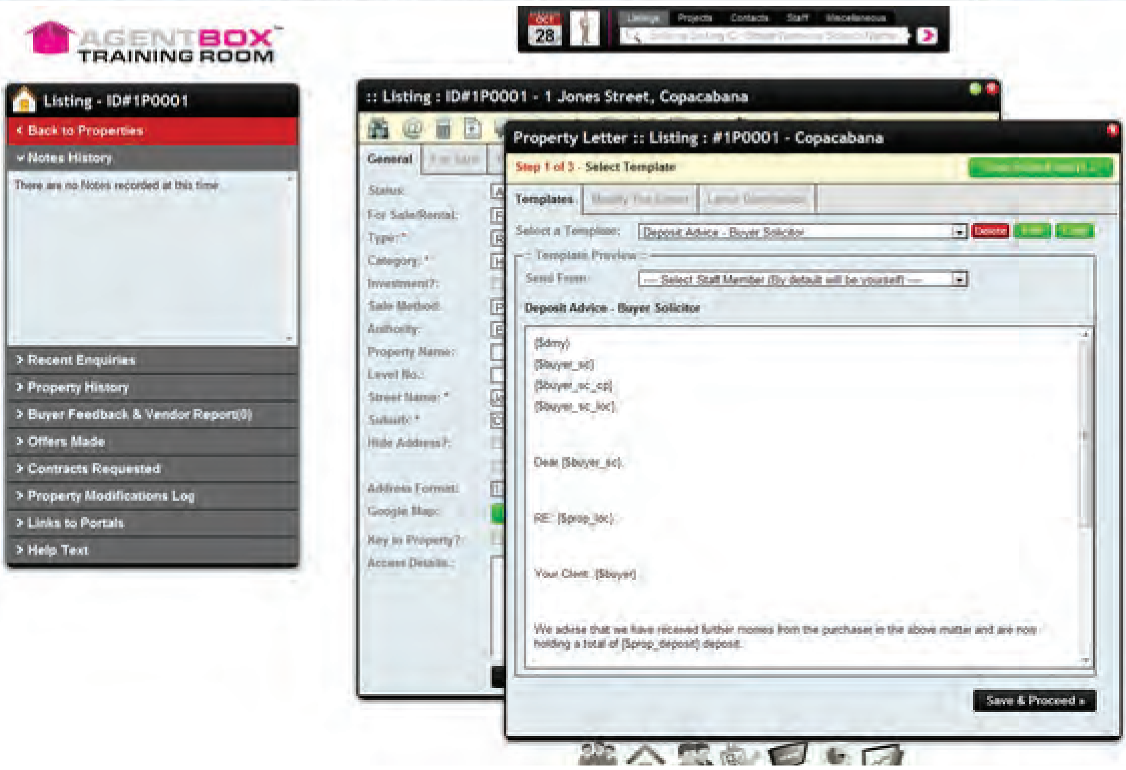


2. Click on the Select A Template drop down menu at the top of the panel and choose the template you would like to delete.

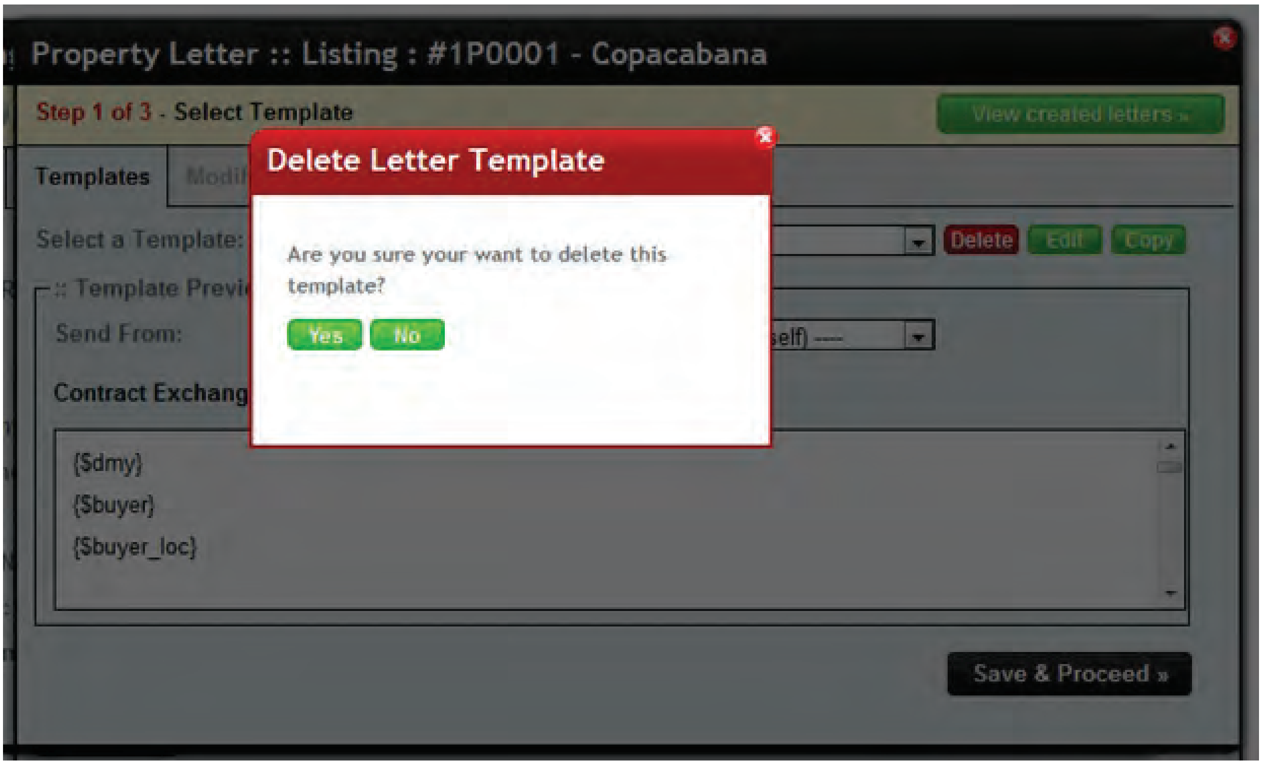


3. You will now be able to click a red Delete button to the right of the Select a Template drop down menu.





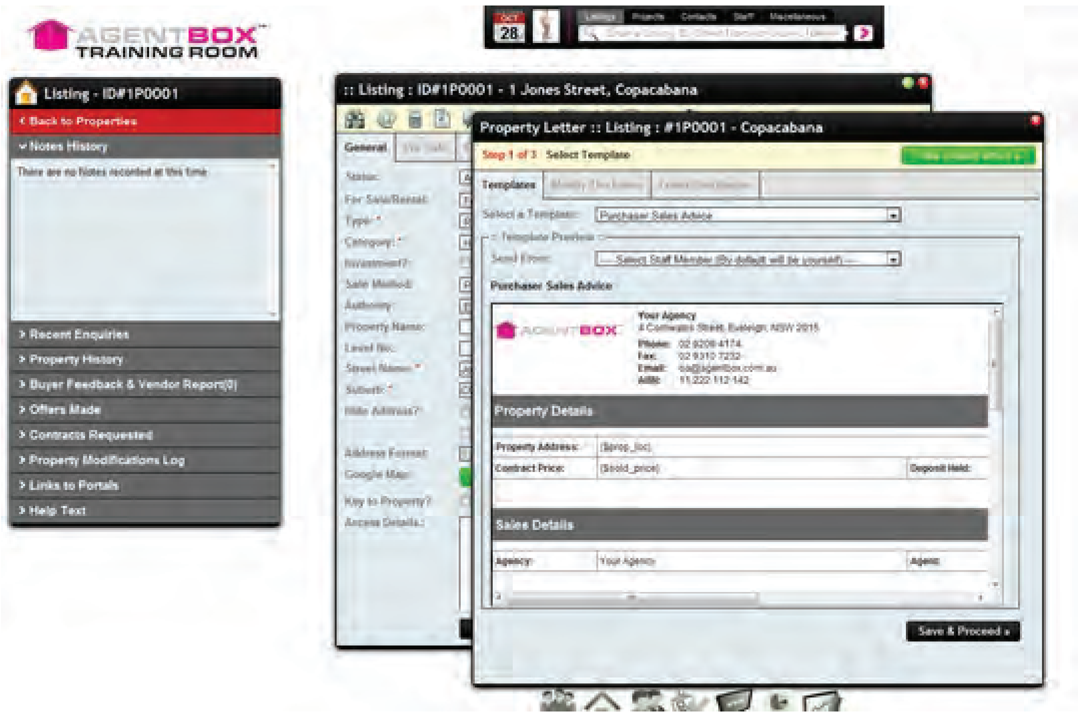
4. You will be prompted to confirm that you would like to delete the template, click Yes to proceed or No to cancel.



Share a Letter Template

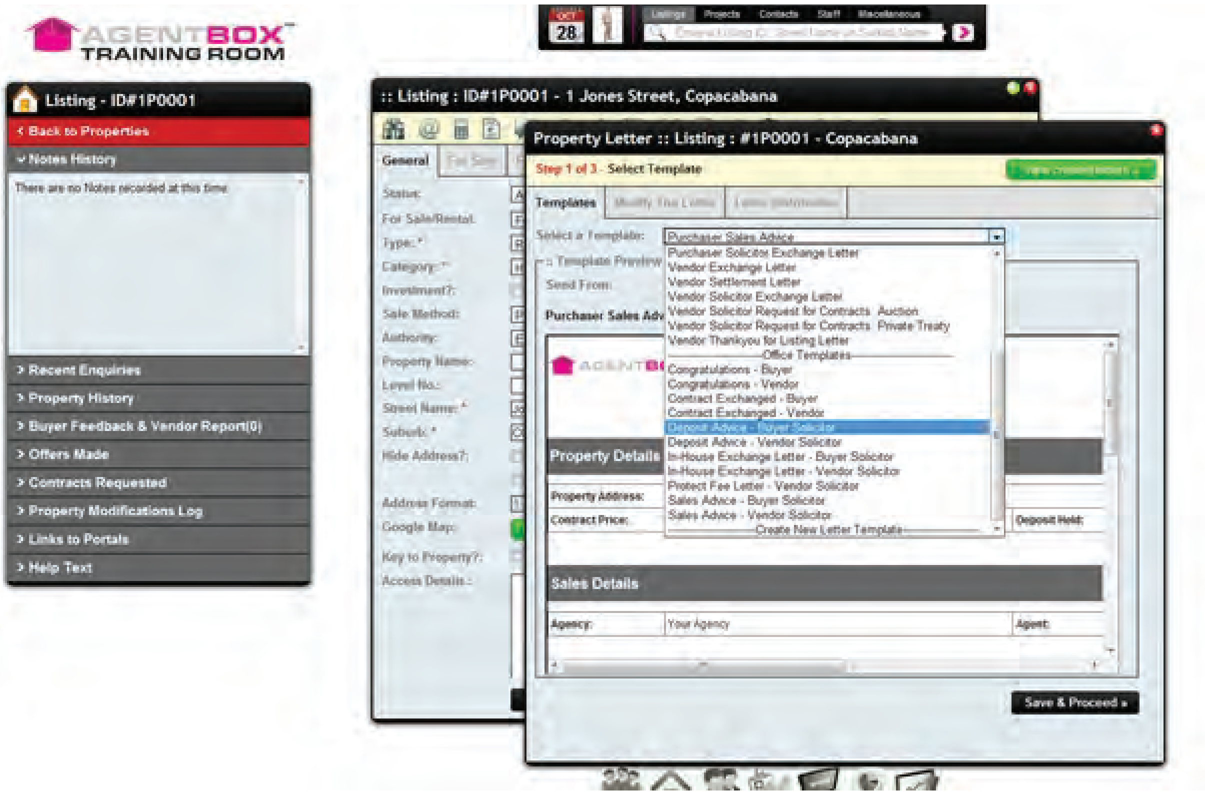
How do I share a letter template to other staff?

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

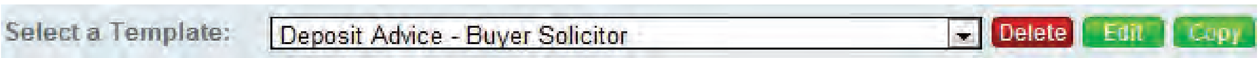


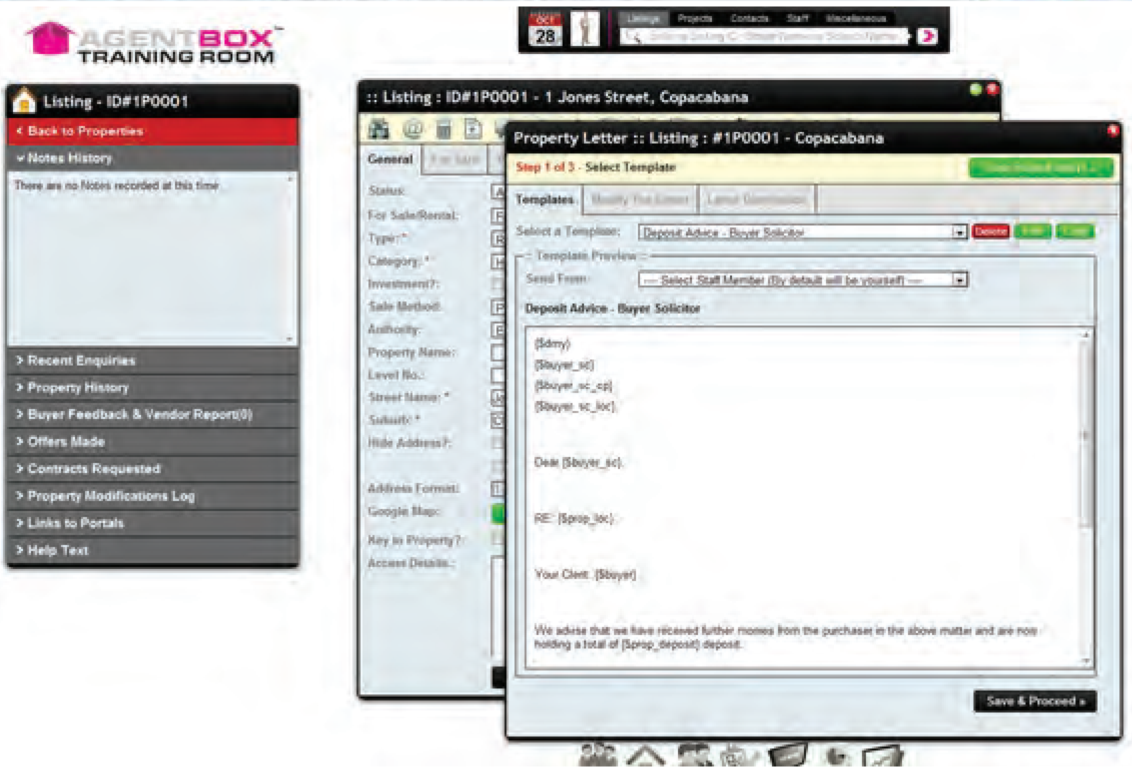
2. Click on the Select A Template drop down menu at the top of the panel and choose the template you

would like to share.

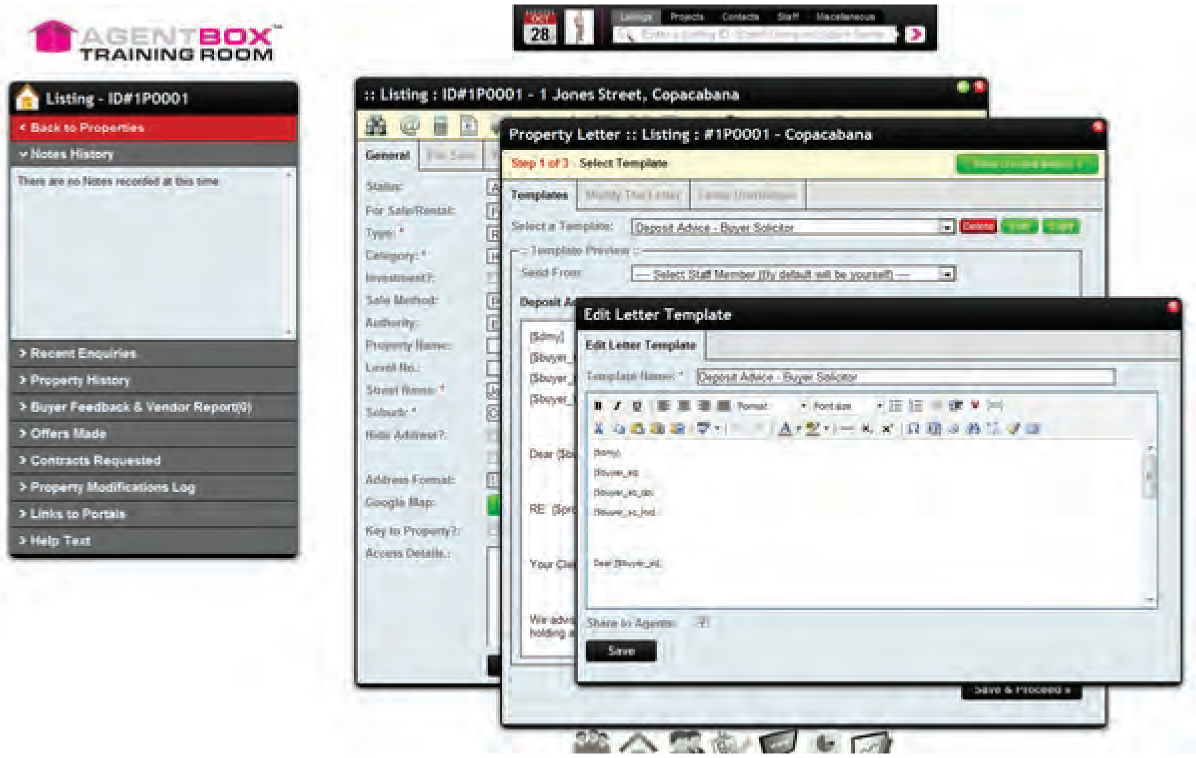


3. You will now be able to click a green Edit button to the right of the Select a Template drop down menu.





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.

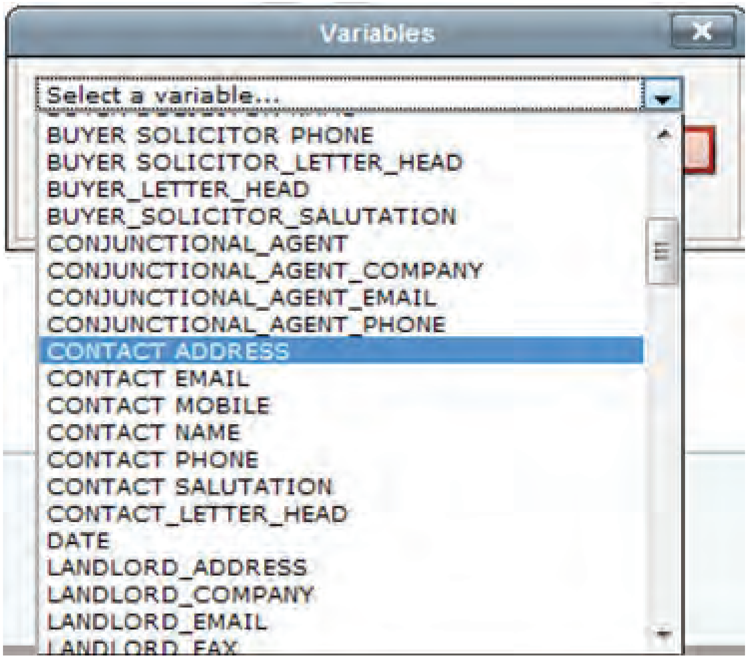
Conduct a Mail Merge to Contacts

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
   - Create a Letter Template
   - Copy a Letter Template
   - Edit a Letter Template

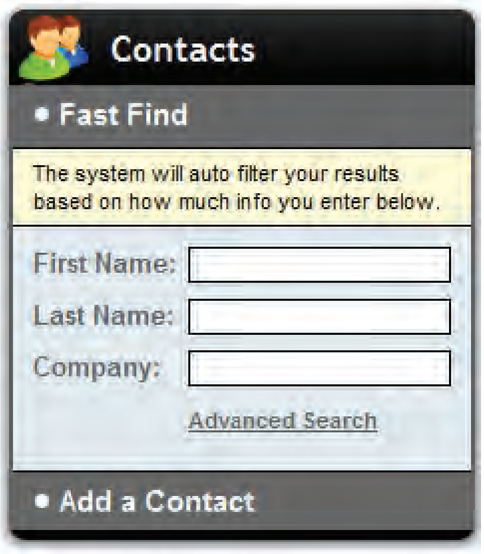
Hints

- If the mail merge is going to all Vendor's then the Vendor Variables must be used and the contact must be ticked as a Vendor (Contact Class).
- If the mail merge is going to all contacts in your database, and they all have different contact classes eg. combination of buyers, vendors, solicitors etc. you can use the Contact variables



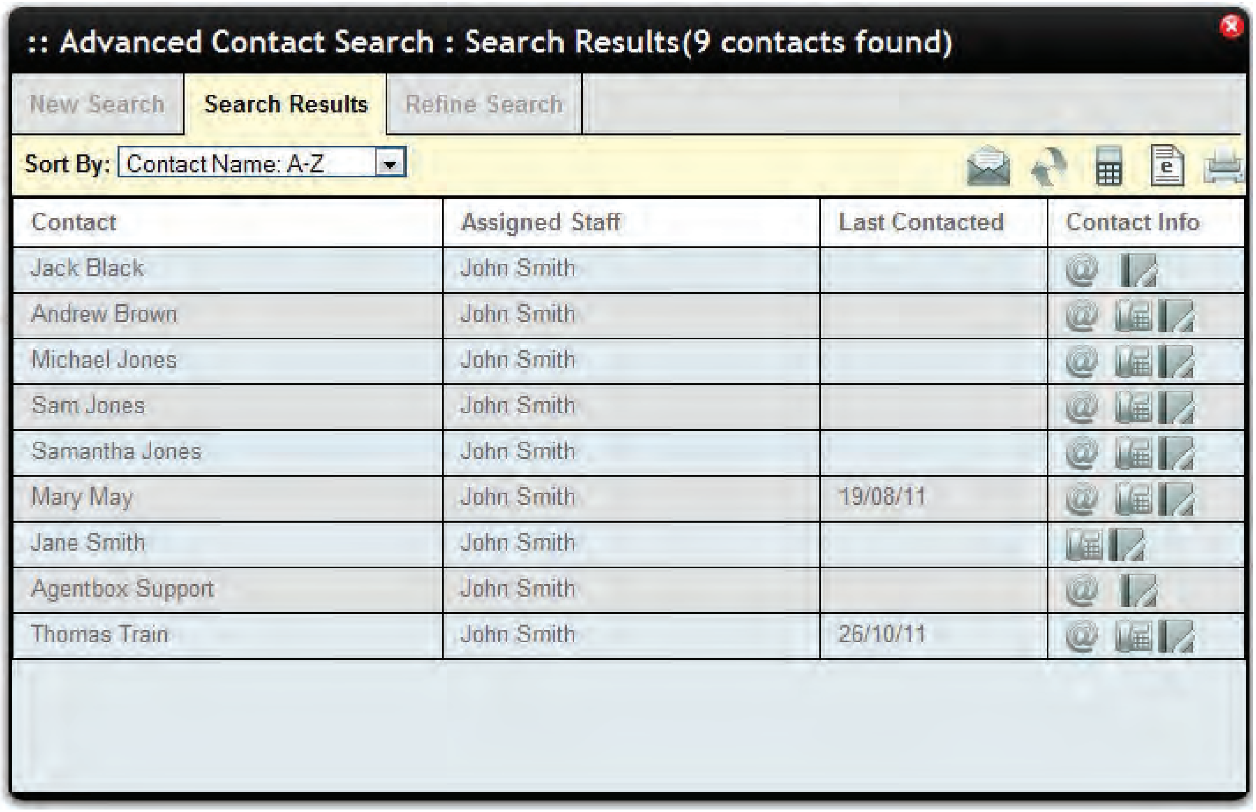
2. Click on Contacts from the main menu

3. Click Advanced Search on the left panel



4. Complete an [Advanced Contact Search](#) to generate your list of recipients.

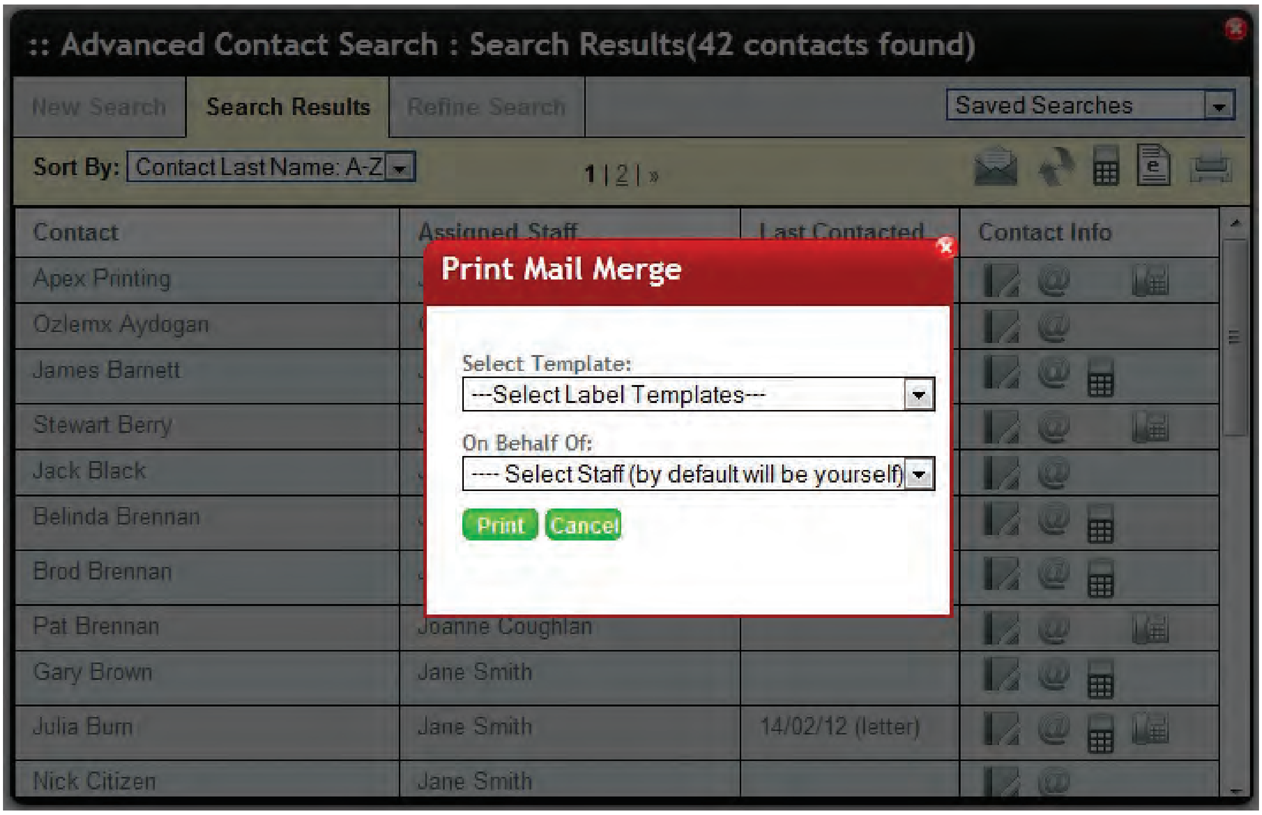
5. Click the letter icon at the top of your search results. 



6. Select your template created in step 1 from the Select Template dropdown menu.

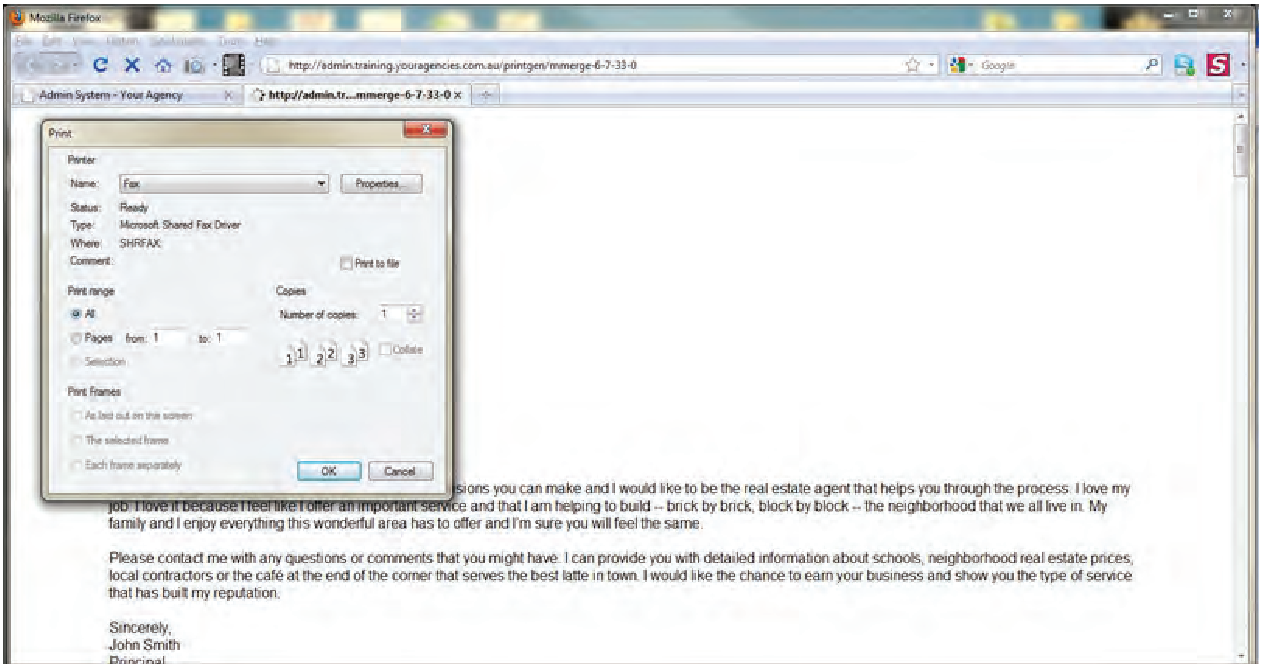
7. Select which staff member you will be sending the mail merge from.

8. Click the green Print button.



9. Your mail merge will open in a new browser tab or window.

**Note: To print one letter per page without any page number or URL bars you will need to set up your* [*print settings*]()



Conduct a Mail Merge to Properties

How do I conduct a mail merge to a group of properties?

1. You will firstly need to create, copy or edit a letter template

- [Create a Letter Template](#)
- [Copy a Letter Template](#)
- [Edit a Letter Template](#)

Hints

To successfully conduct a mail merge you must select a letter template that contains property letter variables to correctly populate relevant property and contact details. For example if the mail merge is to be sent to the owner attached to each property, the owner variable must be used. An owner must also be assigned to each property.

For prospecting purposes, the use of the Property Mail Address and Resident variables are recommended as the Property Mail Address variable will populate the property address in a mailing format and the resident name or salutation variables will populate the name and salutation respectively, of the attached tenant, owner or owner occupier. If neither of these are assigned to the property the variable will display as RESIDENT.

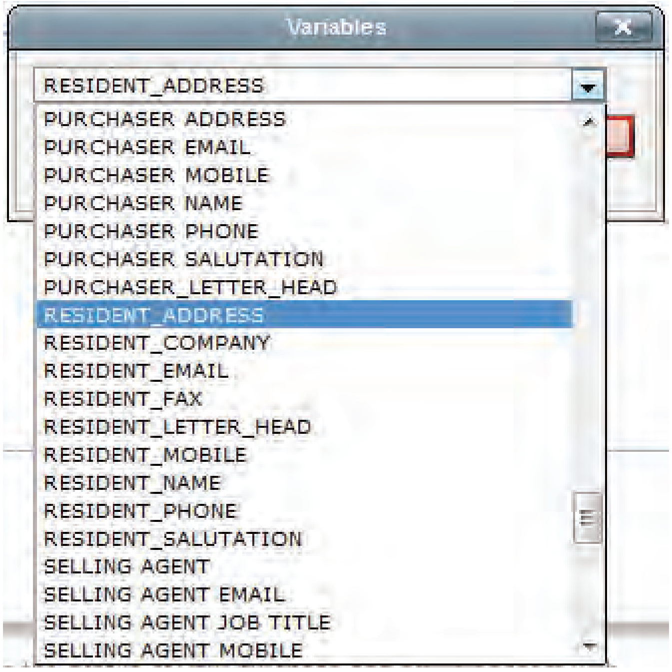
- Use the 'Resident' or Related Contact role (e.g. 'Purchaser') Letter Variables

- The letter Variable for the property address is {$prop_mail_address} which returns the property address in a mailing format.

- To ensure the letter is addressed to the appropriate person there have been rules applied to the following Resident Variables

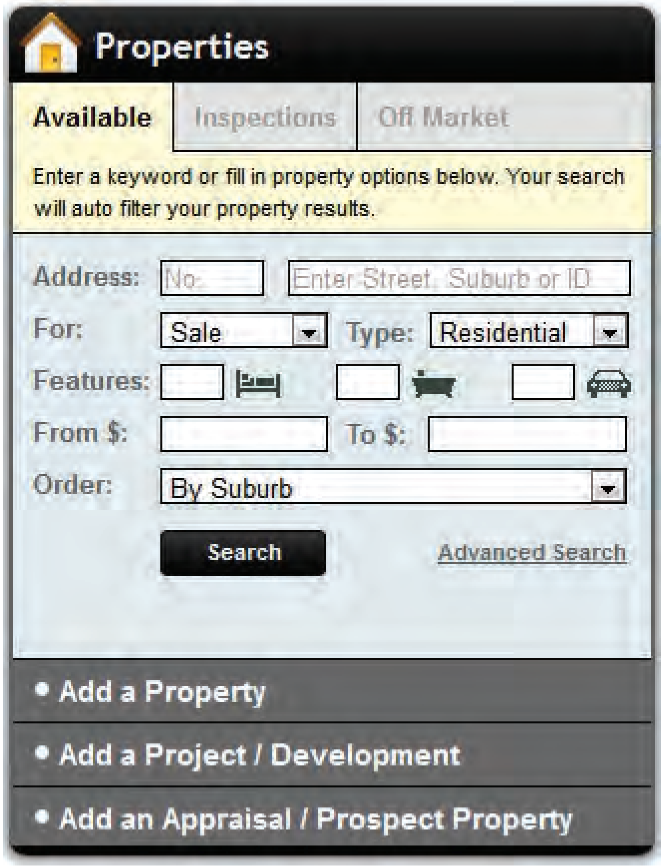
- {$resident} - Will insert the Title, First Name and Last Name of the attached tenant (if one exists), else an attached owner/owner occupier (if one exists), if neither of these are assigned to the property the variable will display as RESIDENT.

- {$resident_dear} - Will insert the Salutation of the attached tenant (if one exists), else an attached owner/owner occupier (if one exists), if neither of these are assigned to the property the variable will display as RESIDENT.



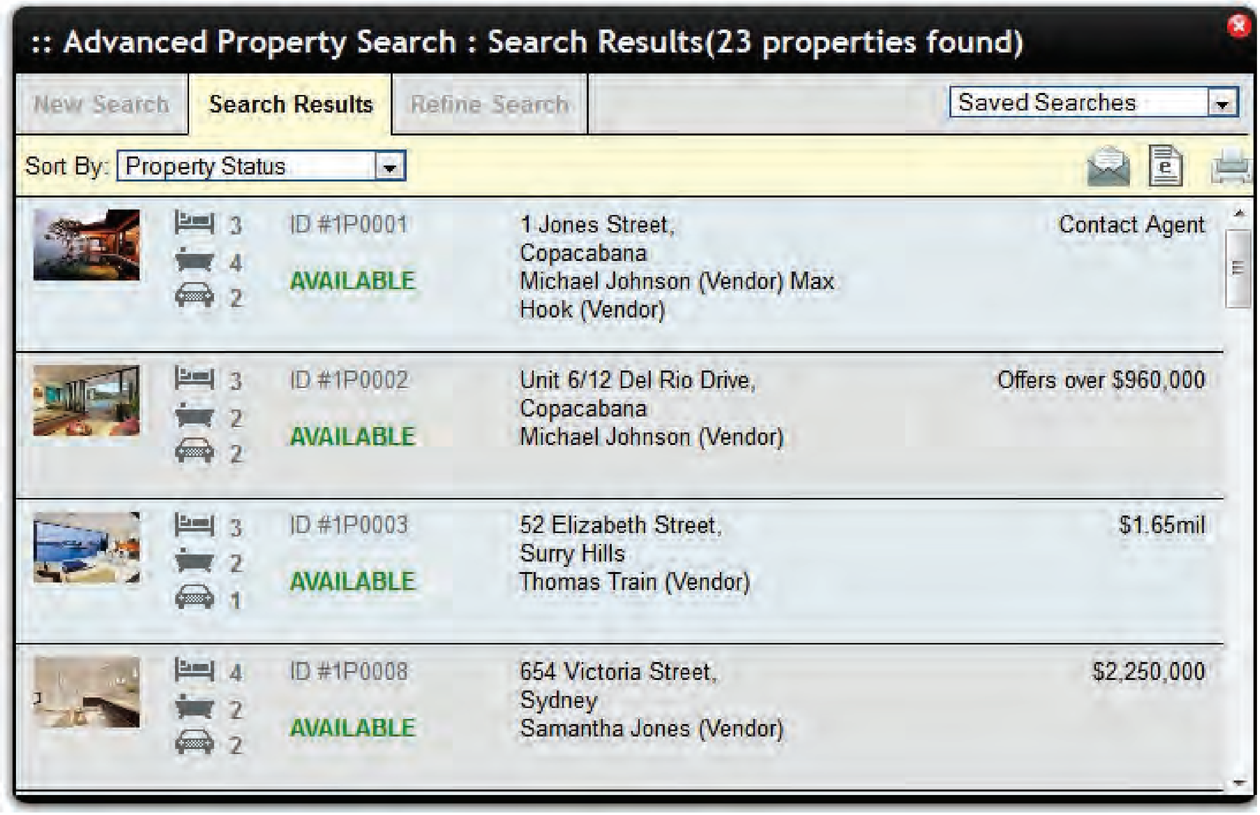
2. Click on the Property icon from the main menu

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

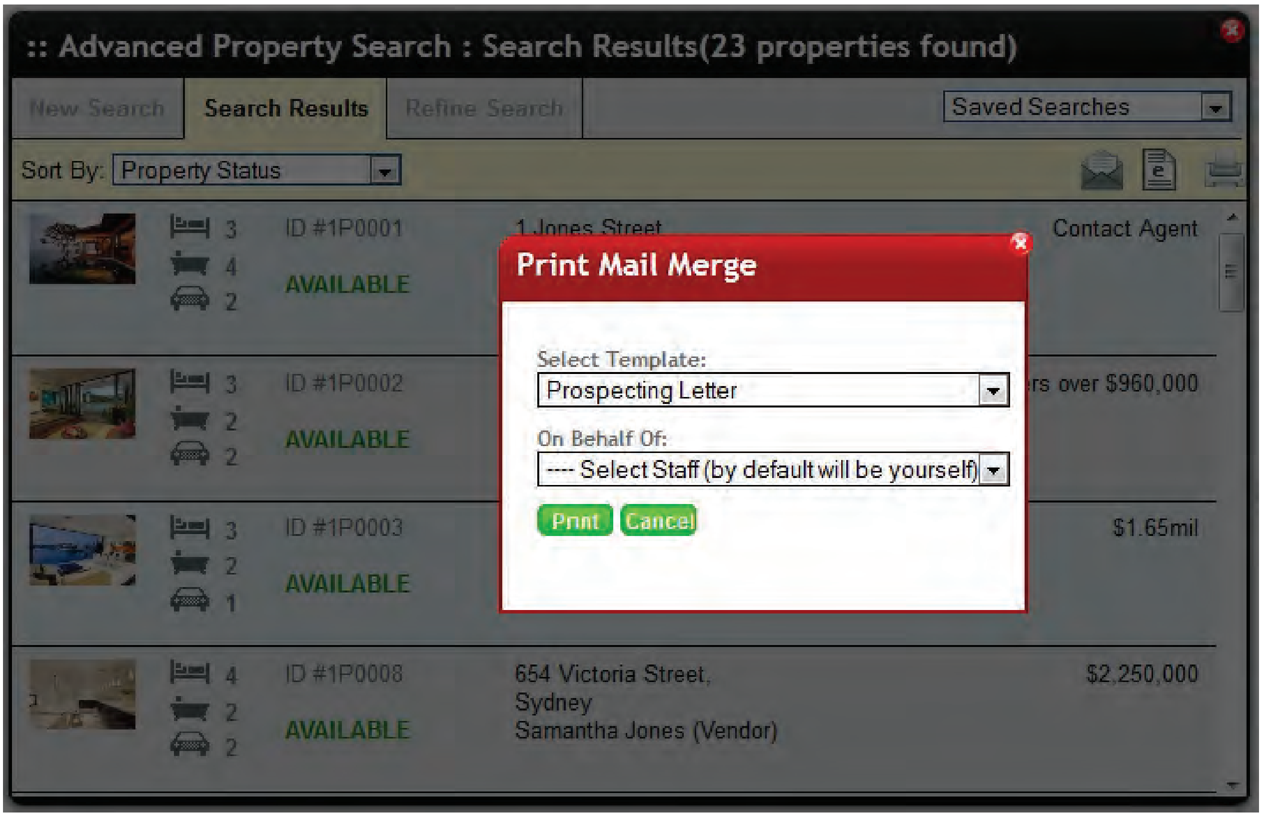


4. Complete an [Advanced Property Search](#) to generate your list of recipients.

5. Click the letter icon at the top of your search results. 

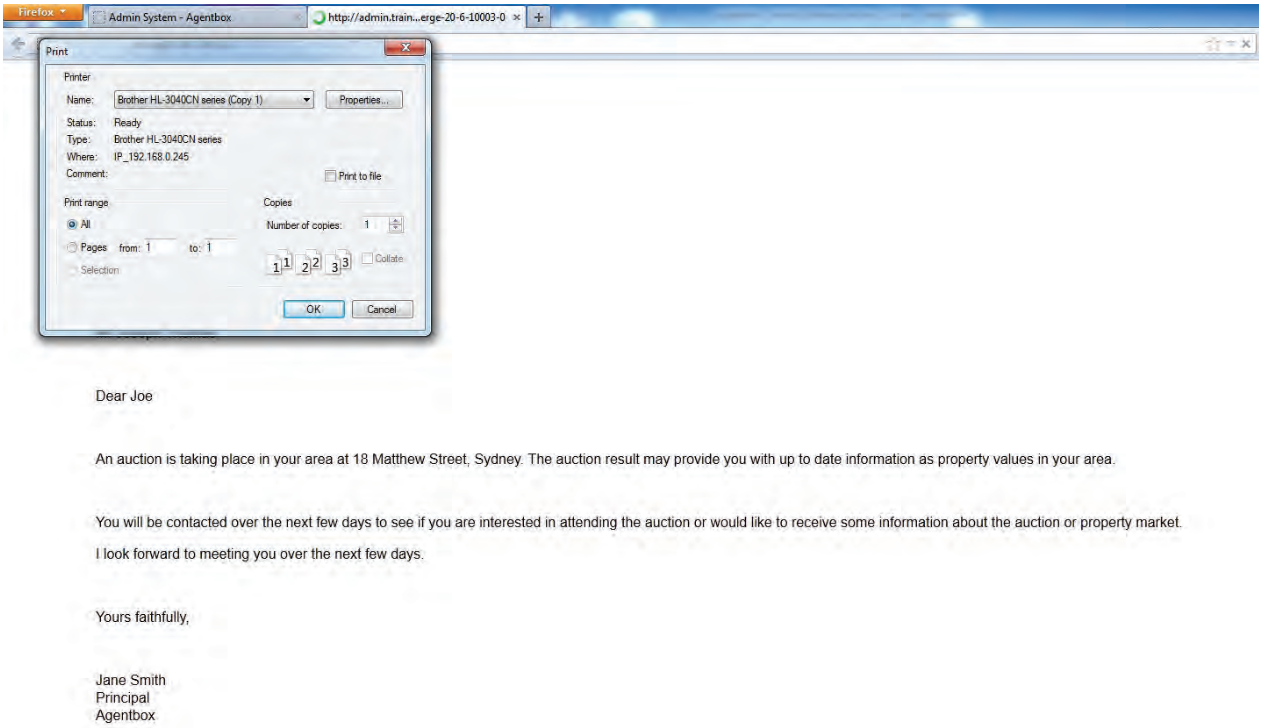


6. Select your template created in step 1 from the Select Template drop down menu.
7. Select which staff member you will be sending the mail merge from.
8. Click the green Print button.



1. Your mail merge will open in a new browser tab or window.

Note: To print one letter per page without any page number or URL bars you will need to set up your [print settings]



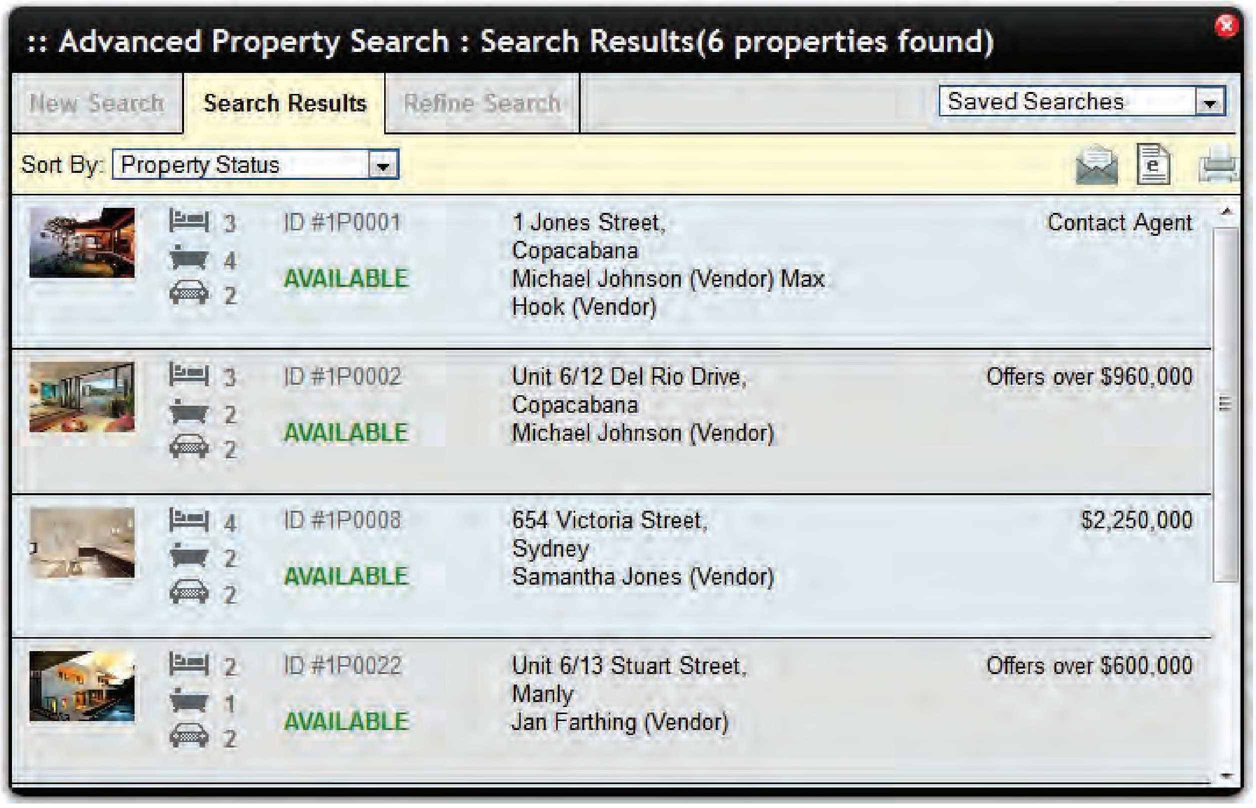
Avery Mailing Label Printing

How do I print Mailing Labels?

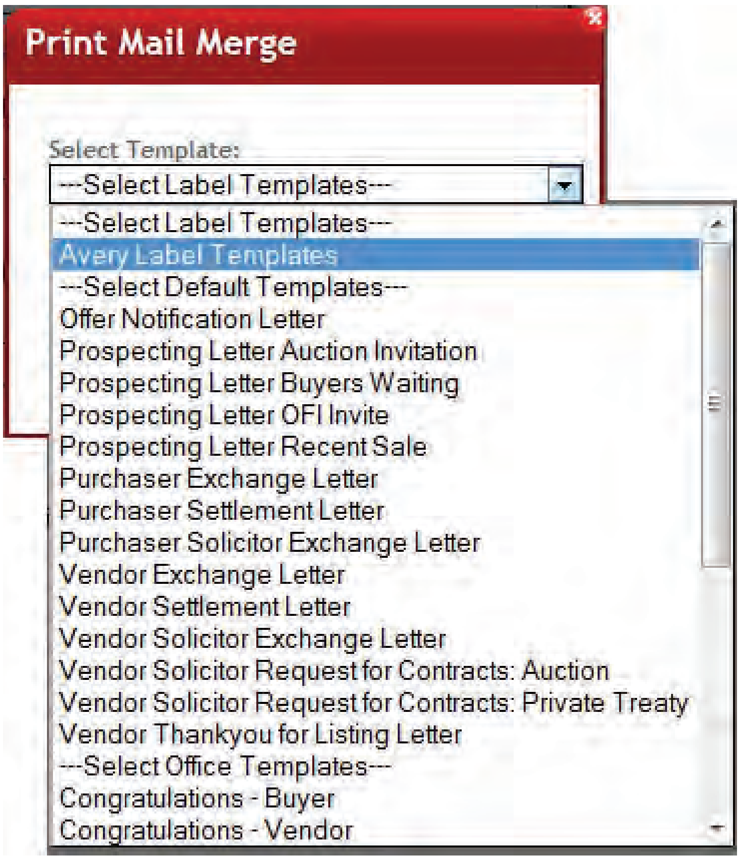
**Note: Our mailing label templates are compatible with Avery Labels L7159, L7160, L7161, L7162, L7163.*

1. You can print labels to a group of contacts or group of properties by completing either an advanced contact search, advanced property search or opening any target list e.g. Inspection Viewers of a property etc

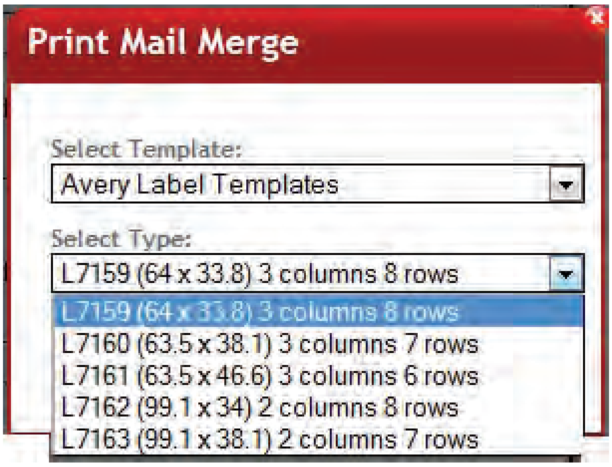
2. Click on the Print Mail Merge icon  at the top of the target list.



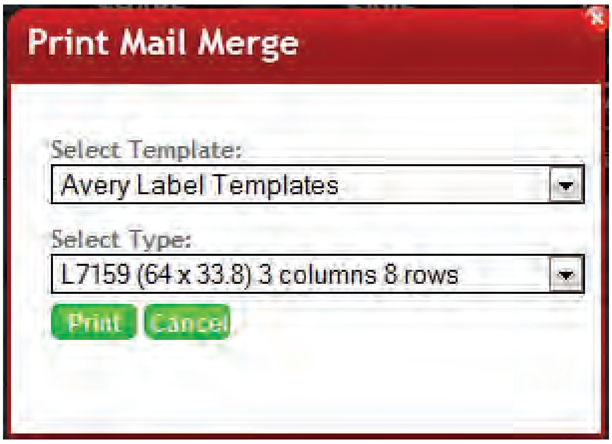
3. Select Avery Label Templates from the Select Template drop down.



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

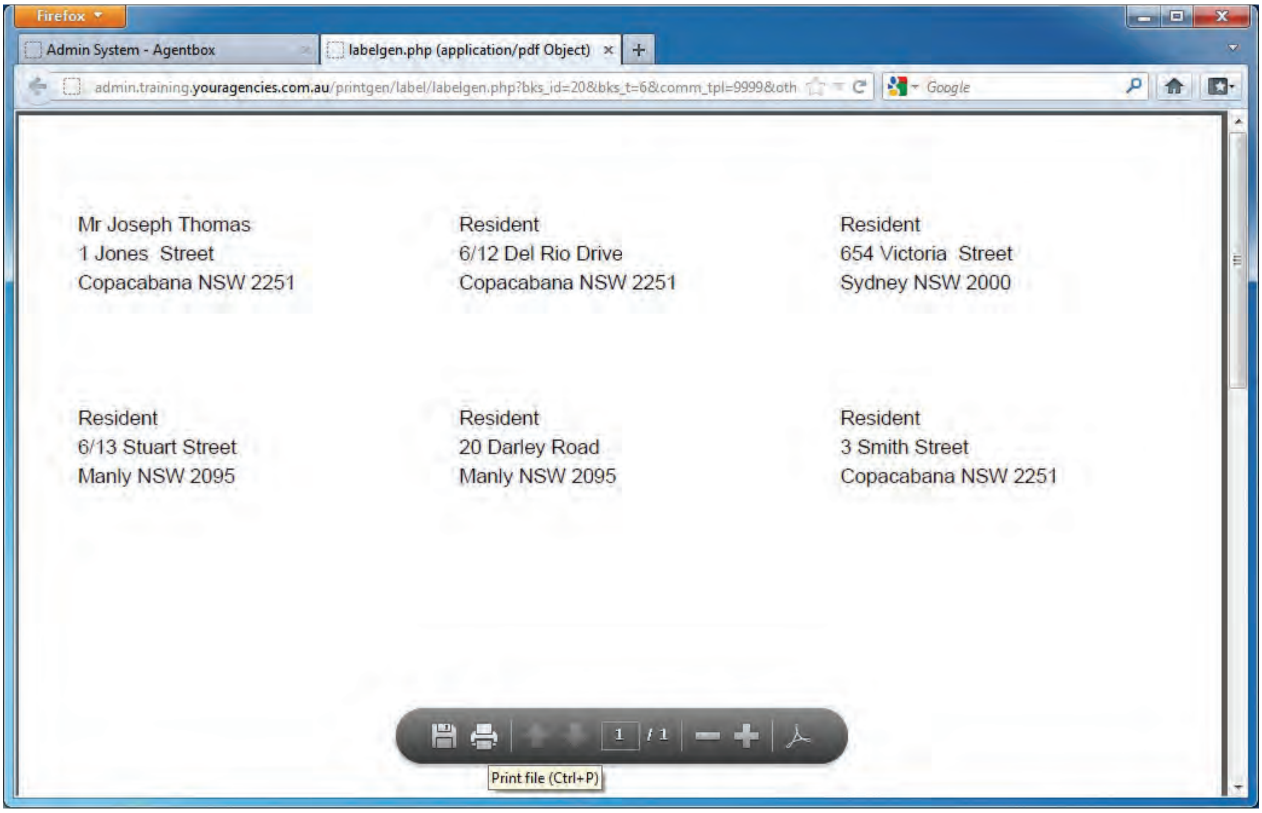


5. Click Print to generate your labels as a PDF document



6. Insert labels into your printer and click Print

**Please note, if sending to;*
*- a **group of properties** the labels will insert the Title, First Name and Last Name of the attached tenant (if one exists), else an attached owner/owner occupier (if one exists), If neither of these are assigned to the property the variable will display as RESIDENT.*
*- a **group of contacts** the labels will insert the Letter head which by default will Address the Custom Letter head entered (if one exists), else Title, First Name, Last Name, Company Name and postal address (if one exists), else Title, First Name, Last Name, Company Name and residential address .*



Variables

What are the available variables/merge fields for letter templates?

Variable	Name	Notes
GENERAL VARIABLES		
{$dmy}	30th April 2012	current date when producing the lett
CONTACT VARIABLES		
{$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}	#VENDOR_ADDRESS#	
{$vendor_fx}	#VENDOR_FAX#	
{$solicitor}	#SOLICITOR#	
{$solicitor_fn}	#SOLICITOR_FIRSTNAME#	
{$solicitor_sn}	#SOLICITOR_SURNAME#	
{$solicitor_cp}	#SOLICITOR_COMPANY#	
{$solicitor_dear}	#SOLICITOR_SALUTATION#	
{$solicitor_ph}	#SOLICITOR_PHONE#	
{$solicitor_mo}	#SOLICITOR_MOBILE#	
{$solicitor_em}	#SOLICITOR_EMAIL#	
{$solicitor_lh}	#SOLICITOR_LETTER_HEAD#	
{$solicitor_loc}	#SOLICITOR_ADDRESS#	
{$solicitor_fx}	#SOLICITOR_FAX#	
{$developer}	#DEVELOPER#	
{$developer_fn}	#DEVELOPER_FIRSTNAME#	
{$developer_sn}	#DEVELOPER_SURNAME#	
{$developer_cp}	#DEVELOPER_COMPANY#	
{$developer_dear}	#DEVELOPER_SALUTATION#	
{$developer_ph}	#DEVELOPER_PHONE#	
{$developer_mo}	#DEVELOPER_MOBILE#	
{$developer_em}	#DEVELOPER_EMAIL#	
{$developer_lh}	#DEVELOPER_LETTER_HEAD#	
{$developer_loc}	#DEVELOPER_ADDRESS#	
{$developer_fx}	#DEVELOPER_FAX#	
{$accountant}	#ACCOUNTANT#	
{$accountant_fn}	#ACCOUNTANT_FIRSTNAME#	
{$accountant_sn}	#ACCOUNTANT_SURNAME#	
{$accountant_cp}	#ACCOUNTANT_COMPANY#	
{$accountant_dear}	#ACCOUNTANT_SALUTATION#	
{$accountant_ph}	#ACCOUNTANT_PHONE#	
{$accountant_mo}	#ACCOUNTANT_MOBILE#	
{$accountant_em}	#ACCOUNTANT_EMAIL#	
{$accountant_lh}	#ACCOUNTANT_LETTER_HEAD#	
{$accountant_loc}	#ACCOUNTANT_ADDRESS#	
{$accountant_fx}	#ACCOUNTANT_FAX#	
{$tenant}	#TENANT#	
{$tenant_fn}	#TENANT_FIRSTNAME#	
{$tenant_sn}	#TENANT_SURNAME#	
{$tenant_cp}	#TENANT_COMPANY#	
{$tenant_dear}	#TENANT_SALUTATION#	
{$tenant_ph}	#TENANT_PHONE#	
{$tenant_mo}	#TENANT_MOBILE#	
{$tenant_em}	#TENANT_EMAIL#	
{$tenant_lh}	#TENANT_LETTER_HEAD#	
{$tenant_loc}	#TENANT_ADDRESS#	
{$tenant_fx}	#TENANT_FAX#	
{$landlord}	#LANDLORD#	

{$landlord_fn}	#LANDLORD_FIRSTNAME#	
{$landlord_sn}	#LANDLORD_SURNAME#	
{$landlord_cp}	#LANDLORD_COMPANY#	
{$landlord_dear}	#LANDLORD_SALUTATION#	
{$landlord_ph}	#LANDLORD_PHONE#	
{$landlord_mo}	#LANDLORD_MOBILE#	
{$landlord_em}	#LANDLORD_EMAIL#	
{$landlord_lh}	#LANDLORD_LETTER_HEAD#	
{$landlord_loc}	#LANDLORD_ADDRESS#	
{$landlord_fx}	#LANDLORD_FAX#	
{$investor}	#INVESTOR#	
{$investor_fn}	#INVESTOR_FIRSTNAME#	
{$investor_sn}	#INVESTOR_SURNAME#	
{$investor_cp}	#INVESTOR_COMPANY#	
{$investor_dear}	#INVESTOR_SALUTATION#	
{$investor_ph}	#INVESTOR_PHONE#	
{$investor_mo}	#INVESTOR_MOBILE#	
{$investor_em}	#INVESTOR_EMAIL#	
{$investor_lh}	#INVESTOR_LETTER_HEAD#	
{$investor_loc}	#INVESTOR_ADDRESS#	
{$investor_fx}	#INVESTOR_FAX#	
{$owner_occupied}	#OWNER_OCCUPIED#	
{$owner_occupied_fn}	#OWNER_OCCUPIED_FIRSTNAME#	
{$owner_occupied_sn}	#OWNER_OCCUPIED_SURNAME#	
{$owner_occupied_cp}	#OWNER_OCCUPIED_COMPANY#	
{$owner_occupied_dear}	#OWNER_OCCUPIED_SALUTATION#	
{$owner_occupied_ph}	#OWNER_OCCUPIED_PHONE#	
{$owner_occupied_mo}	#OWNER_OCCUPIED_MOBILE#	
{$owner_occupied_em}	#OWNER_OCCUPIED_EMAIL#	
{$owner_occupied_lh}	#OWNER_OCCUPIED_LETTER_HEAD#	
{$owner_occupied_loc}	#OWNER_OCCUPIED_ADDRESS#	
{$owner_occupied_fx}	#OWNER_OCCUPIED_FAX#	
{$referrer}	#REFERRER#	
{$referrer_fn}	#REFERRER_FIRSTNAME#	
{$referrer_sn}	#REFERRER_SURNAME#	
{$referrer_cp}	#REFERRER_COMPANY#	
{$referrer_dear}	#REFERRER_SALUTATION#	
{$referrer_ph}	#REFERRER_PHONE#	
{$referrer_mo}	#REFERRER_MOBILE#	
{$referrer_em}	#REFERRER_EMAIL#	
{$referrer_lh}	#REFERRER_LETTER_HEAD#	
{$referrer_loc}	#REFERRER_ADDRESS#	
{$referrer_fx}	#REFERRER_FAX#	
{$tradesperson}	#TRADESPERSON#	
{$tradesperson_fn}	#TRADESPERSON_FIRSTNAME#	
{$tradesperson_sn}	#TRADESPERSON_SURNAME#	
{$tradesperson_cp}	#TRADESPERSON_COMPANY#	
{$tradesperson_dear}	#TRADESPERSON_SALUTATION#	

{$tradesperson_ph}	#TRADESPERSON_PHONE#	
{$tradesperson_mo}	#TRADESPERSON_MOBILE#	
{$tradesperson_em}	#TRADESPERSON_EMAIL#	
{$tradesperson_lh}	#TRADESPERSON_LETTER_HEAD#	
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{$supplier}	#SUPPLIER#	
{$supplier_fn}	#SUPPLIER_FIRSTNAME#	
{$supplier_sn}	#SUPPLIER_SURNAME#	
{$supplier_cp}	#SUPPLIER_COMPANY#	
{$supplier_dear}	#SUPPLIER_SALUTATION#	
{$supplier_ph}	#SUPPLIER_PHONE#	
{$supplier_mo}	#SUPPLIER_MOBILE#	
{$supplier_em}	#SUPPLIER_EMAIL#	
{$supplier_lh}	#SUPPLIER_LETTER_HEAD#	
{$supplier_loc}	#SUPPLIER_ADDRESS#	
{$supplier_fx}	#SUPPLIER_FAX#	
{$conjunctional_agent}	#CONJUNCTIONAL_AGENT#	
{$conjunctional_agent_fn}	#CONJUNCTIONAL_AGENT_FIRSTNAME#	
{$conjunctional_agent_sn}	#CONJUNCTIONAL_AGENT_SURNAME#	
{$conjunctional_agent_cp}	#CONJUNCTIONAL_AGENT_COMPANY#	
{$conjunctional_agent_dear}	#CONJUNCTIONAL_AGENT_SALUTATION#	
{$conjunctional_agent_ph}	#CONJUNCTIONAL_AGENT_PHONE#	
{$conjunctional_agent_mo}	#CONJUNCTIONAL_AGENT_MOBILE#	
{$conjunctional_agent_em}	#CONJUNCTIONAL_AGENT_EMAIL#	
{$conjunctional_agent_lh}	#CONJUNCTIONAL_AGENT_LETTER_HEAD#	
{$conjunctional_agent_loc}	#CONJUNCTIONAL_AGENT_ADDRESS#	
{$conjunctional_agent_fx}	#CONJUNCTIONAL_AGENT_FAX#	
{$buyer_solicitor}	#BUYER_SOLICITOR#	
{$buyer_solicitor_fn}	#BUYER_SOLICITOR_FIRSTNAME#	
{$buyer_solicitor_sn}	#BUYER_SOLICITOR_SURNAME#	
{$buyer_solicitor_cp}	#BUYER_SOLICITOR_COMPANY#	
{$buyer_solicitor_dear}	#BUYER_SOLICITOR_SALUTATION#	
{$buyer_solicitor_ph}	#BUYER_SOLICITOR_PHONE#	
{$buyer_solicitor_mo}	#BUYER_SOLICITOR_MOBILE#	
{$buyer_solicitor_em}	#BUYER_SOLICITOR_EMAIL#	
{$buyer_solicitor_lh}	#BUYER_SOLICITOR_LETTER_HEAD#	
{$buyer_solicitor_loc}	#BUYER_SOLICITOR_ADDRESS#	
{$buyer_solicitor_fx}	#BUYER_SOLICITOR_FAX#	
{$vendor_solicitor}	#VENDOR_SOLICITOR#	
{$vendor_solicitor_fn}	#VENDOR_SOLICITOR_FIRSTNAME#	
{$vendor_solicitor_sn}	#VENDOR_SOLICITOR_SURNAME#	
{$vendor_solicitor_cp}	#VENDOR_SOLICITOR_COMPANY#	
{$vendor_solicitor_dear}	#VENDOR_SOLICITOR_SALUTATION#	
{$vendor_solicitor_ph}	#VENDOR_SOLICITOR_PHONE#	
{$vendor_solicitor_mo}	#VENDOR_SOLICITOR_MOBILE#	
{$vendor_solicitor_em}	#VENDOR_SOLICITOR_EMAIL#	

{$vendor_solicitor_lh}	#VENDOR_SOLICITOR_LETTER_HEAD#	
{$vendor_solicitor_loc}	#VENDOR_SOLICITOR_ADDRESS#	
{$vendor_solicitor_fx}	#VENDOR_SOLICITOR_FAX#	
{$auctioneer}	#AUCTIONEER#	
{$auctioneer_fn}	#AUCTIONEER_FIRSTNAME#	
{$auctioneer_sn}	#AUCTIONEER_SURNAME#	
{$auctioneer_cp}	#AUCTIONEER_COMPANY#	
{$auctioneer_dear}	#AUCTIONEER_SALUTATION#	
{$auctioneer_ph}	#AUCTIONEER_PHONE#	
{$auctioneer_mo}	#AUCTIONEER_MOBILE#	
{$auctioneer_em}	#AUCTIONEER_EMAIL#	
{$auctioneer_lh}	#AUCTIONEER_LETTER_HEAD#	
{$auctioneer_loc}	#AUCTIONEER_ADDRESS#	
{$auctioneer_fx}	#AUCTIONEER_FAX#	
{$business}	#BUSINESS#	
{$business_fn}	#BUSINESS_FIRSTNAME#	
{$business_sn}	#BUSINESS_SURNAME#	
{$business_cp}	#BUSINESS_COMPANY#	
{$business_dear}	#BUSINESS_SALUTATION#	
{$business_ph}	#BUSINESS_PHONE#	
{$business_mo}	#BUSINESS_MOBILE#	
{$business_em}	#BUSINESS_EMAIL#	
{$business_lh}	#BUSINESS_LETTER_HEAD#	
{$business_loc}	#BUSINESS_ADDRESS#	
{$business_fx}	#BUSINESS_FAX#	
{$prospective_vendor}	#PROSPECTIVE_VENDOR#	
{$prospective_vendor_fn}	#PROSPECTIVE_VENDOR_FIRSTNAME#	
{$prospective_vendor_sn}	#PROSPECTIVE_VENDOR_SURNAME#	
{$prospective_vendor_cp}	#PROSPECTIVE_VENDOR_COMPANY#	
{$prospective_vendor_dear}	#PROSPECTIVE_VENDOR_SALUTATION#	
{$prospective_vendor_ph}	#PROSPECTIVE_VENDOR_PHONE#	
{$prospective_vendor_mo}	#PROSPECTIVE_VENDOR_MOBILE#	
{$prospective_vendor_em}	#PROSPECTIVE_VENDOR_EMAIL#	
{$prospective_vendor_lh}	#PROSPECTIVE_VENDOR_LETTER_HEAD#	
{$prospective_vendor_loc}	#PROSPECTIVE_VENDOR_ADDRESS#	
{$prospective_vendor_fx}	#PROSPECTIVE_VENDOR_FAX#	
{$purchaser}	#PURCHASER#	
{$purchaser_fn}	#PURCHASER_FIRSTNAME#	
{$purchaser_sn}	#PURCHASER_SURNAME#	
{$purchaser_cp}	#PURCHASER_COMPANY#	
{$purchaser_dear}	#PURCHASER_SALUTATION#	
{$purchaser_ph}	#PURCHASER_PHONE#	
{$purchaser_mo}	#PURCHASER_MOBILE#	
{$purchaser_em}	#PURCHASER_EMAIL#	
{$purchaser_lh}	#PURCHASER_LETTER_HEAD#	
{$purchaser_loc}	#PURCHASER_ADDRESS#	
{$purchaser_fx}	#PURCHASER_FAX#	
{$prospective_landlord}	#PROSPECTIVE_LANDLORD#	

{$prospective_landlord_fn}	#PROSPECTIVE_LANDLORD_FIRSTNAME#	
{$prospective_landlord_sn}	#PROSPECTIVE_LANDLORD_SURNAME#	
{$prospective_landlord_cp}	#PROSPECTIVE_LANDLORD_COMPANY#	
{$prospective_landlord_dear}	#PROSPECTIVE_LANDLORD_SALUTATION #	
{$prospective_landlord_ph}	#PROSPECTIVE_LANDLORD_PHONE#	
{$prospective_landlord_mo}	#PROSPECTIVE_LANDLORD_MOBILE#	
{$prospective_landlord_em}	#PROSPECTIVE_LANDLORD_EMAIL#	
{$prospective_landlord_lh}	#PROSPECTIVE_LANDLORD_LETTER_HEAD #	
{$prospective_landlord_loc}	#PROSPECTIVE_LANDLORD_ADDRESS#	
{$prospective_landlord_fx}	#PROSPECTIVE_LANDLORD_FAX#	
{$past_purchaser}	#PAST_PURCHASER#	
{$past_purchaser_fn}	#PAST_PURCHASER_FIRSTNAME#	
{$past_purchaser_sn}	#PAST_PURCHASER_SURNAME#	
{$past_purchaser_cp}	#PAST_PURCHASER_COMPANY#	
{$past_purchaser_dear}	#PAST_PURCHASER_SALUTATION#	
{$past_purchaser_ph}	#PAST_PURCHASER_PHONE#	
{$past_purchaser_mo}	#PAST_PURCHASER_MOBILE#	
{$past_purchaser_em}	#PAST_PURCHASER_EMAIL#	
{$past_purchaser_lh}	#PAST_PURCHASER_LETTER_HEAD#	
{$past_purchaser_loc}	#PAST_PURCHASER_ADDRESS#	
{$past_purchaser_fx}	#PAST_PURCHASER_FAX#	
{$past_vendor}	#PAST_VENDOR#	
{$past_vendor_fn}	#PAST_VENDOR_FIRSTNAME#	
{$past_vendor_sn}	#PAST_VENDOR_SURNAME#	
{$past_vendor_cp}	#PAST_VENDOR_COMPANY#	
{$past_vendor_dear}	#PAST_VENDOR_SALUTATION#	
{$past_vendor_ph}	#PAST_VENDOR_PHONE#	
{$past_vendor_mo}	#PAST_VENDOR_MOBILE#	
{$past_vendor_em}	#PAST_VENDOR_EMAIL#	
{$past_vendor_lh}	#PAST_VENDOR_LETTER_HEAD#	
{$past_vendor_loc}	#PAST_VENDOR_ADDRESS#	
{$past_vendor_fx}	#PAST_VENDOR_FAX#	
{$other}	#OTHER#	
{$other_fn}	#OTHER_FIRSTNAME#	
{$other_sn}	#OTHER_SURNAME#	
{$other_cp}	#OTHER_COMPANY#	
{$other_dear}	#OTHER_SALUTATION#	
{$other_ph}	#OTHER_PHONE#	
{$other_mo}	#OTHER_MOBILE#	
{$other_em}	#OTHER_EMAIL#	
{$other_lh}	#OTHER_LETTER_HEAD#	
{$other_loc}	#OTHER_ADDRESS#	
{$other_fx}	#OTHER_FAX#	
{$contact}	#CONTACT#	
{$contact_fn}	#CONTACT_FIRSTNAME#	
{$contact_sn}	#CONTACT_SURNAME#	

{$contact_cp}	#CONTACT_COMPANY#	
{$contact_dear}	#CONTACT_SALUTATION#	
{$contact_ph}	#CONTACT_PHONE#	
{$contact_mo}	#CONTACT_MOBILE#	
{$contact_em}	#CONTACT_EMAIL#	
{$contact_lh}	#CONTACT_LETTER_HEAD#	
{$contact_loc}	#CONTACT_ADDRESS#	
{$contact_fx}	#CONTACT_FAX#	
{$resident}	#RESIDENT#	draws from an attached tenant or ow
{$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#	
{$prop_commis}	#PROPERTY_COMMISION#	
{$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#	
{$prop_bed}	#PROPERTY_BEDROOM#	
{$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#	
{$prop_external_size}	#PROPERTY_EXTERNAL_SIZE#	
{$prop_strata_rate}	#PROPERTY_STRATA_RATES#	
{$prop_council_rate}	#PROPERTY_COUNCIL_RATES#	
{$prop_water_rate}	#PROPERTY_WATER_RATES#	
{$prop_catg}	#PROPERTY_CATEGORY#	

{$prop_auth}	#PROPERTY_LISTING_TYPE#	
{$prop_mail_address}	#PROPERTY_MAIL_ADDRESS#	
AGENT /OFFICE VARIABLES		
{$listing_agent}	#LISTING_AGENT#	
{$listing_agent_fn}	#LISTING_AGENT_FIRST_NAME#	
{$listing_agent_sn}	#LISTING_AGENT_LAST_NAME#	
{$listing_agent_mobile}	#LISTING_AGENT_MOBILE#	
{$listing_agent_email}	#LISTING_AGENT_EMAIL#	
{$listing_agent_jobtitle}	#LISTING_AGENT_JOB_TITLE#	
{$property_manager}	#PROPERTY_MANAGER#	
{$property_manager_fn}	#PROPERTY_MANAGER_FIRST_NAME#	
{$property_manager_sn}	#PROPERTY_MANAGER_LAST_NAME#	
{$property_manager_mobile}	#PROPERTY_MANAGER_MOBILE#	
{$property_manager_email}	#PROPERTY_MANAGER_EMAIL#	
{$property_manager_jobtitle}	#PROPERTY_MANAGER_JOB_TITLE#	
{$associate_agent}	#ASSOCIATE_AGENT#	
{$associate_agent_fn}	#ASSOCIATE_AGENT_FIRST_NAME#	
{$associate_agent_sn}	#ASSOCIATE_AGENT_LAST_NAME#	
{$associate_agent_mobile}	#ASSOCIATE_AGENT_MOBILE#	
{$associate_agent_email}	#ASSOCIATE_AGENT_EMAIL#	
{$associate_agent_jobtitle}	#ASSOCIATE_AGENT_JOB_TITLE#	
{$selling_agent}	#SELLING_AGENT#	
{$selling_agent_fn}	#SELLING_AGENT_FIRST_NAME#	
{$selling_agent_sn}	#SELLING_AGENT_LAST_NAME#	
{$selling_agent_mobile}	#SELLING_AGENT_MOBILE#	
{$selling_agent_email}	#SELLING_AGENT_EMAIL#	
{$selling_agent_jobtitle}	#SELLING_AGENT_JOB_TITLE#	
{$property_assistant}	#PROPERTY_ASSISTANT#	
{$property_assistant_fn}	#PROPERTY_ASSISTANT_FIRST_NAME#	
{$property_assistant_sn}	#PROPERTY_ASSISTANT_LAST_NAME#	
{$property_assistant_mobile}	#PROPERTY_ASSISTANT_MOBILE#	
{$property_assistant_email}	#PROPERTY_ASSISTANT_EMAIL#	
{$property_assistant_jobtitle}	#PROPERTY_ASSISTANT_JOB_TITLE#	
{$referral_agent}	#REFERRAL_AGENT#	
{$referral_agent_fn}	#REFERRAL_AGENT_FIRST_NAME#	
{$referral_agent_sn}	#REFERRAL_AGENT_LAST_NAME#	
{$referral_agent_mobile}	#REFERRAL_AGENT_MOBILE#	
{$referral_agent_email}	#REFERRAL_AGENT_EMAIL#	
{$referral_agent_jobtitle}	#REFERRAL_AGENT_JOB_TITLE#	
{$appraisal_agent}	#APPRAISAL_AGENT#	
{$appraisal_agent_fn}	#APPRAISAL_AGENT_FIRST_NAME#	
{$appraisal_agent_sn}	#APPRAISAL_AGENT_LAST_NAME#	
{$appraisal_agent_mobile}	#APPRAISAL_AGENT_MOBILE#	
{$appraisal_agent_email}	#APPRAISAL_AGENT_EMAIL#	
{$appraisal_agent_jobtitle}	#APPRAISAL_AGENT_JOB_TITLE#	
{$mname}	#AGENT STAFF NAME#	
{$mtitle}	#AGENT STAFF JOB TITLE#	
{$mmobile}	#AGENT MOBILE#	

{$m_em}	#AGENT EMAIL#	
{$mof_ph}	#OFFICE NUMBER#	
{$mof_fx}	#OFFICE FAX#	
{$moffice}	#AGENT OFFICE#	
{$maddress}	#OFFICE ADDRESS#	

E-Newsletters

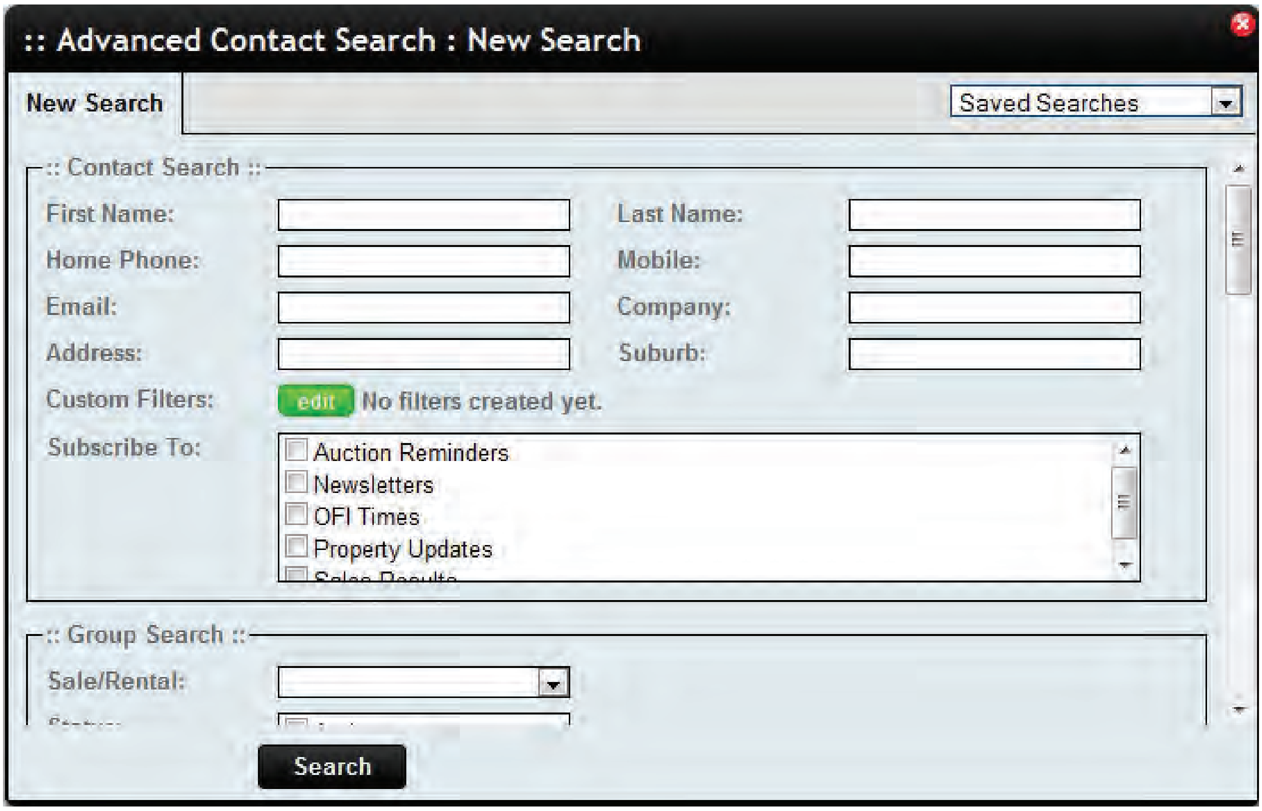
E-Newsletters

You can access the E-Newsletter tool using the E-Newsletter Action Icon on the property and various search results and target lists.

Send Bulk E-Newsletter

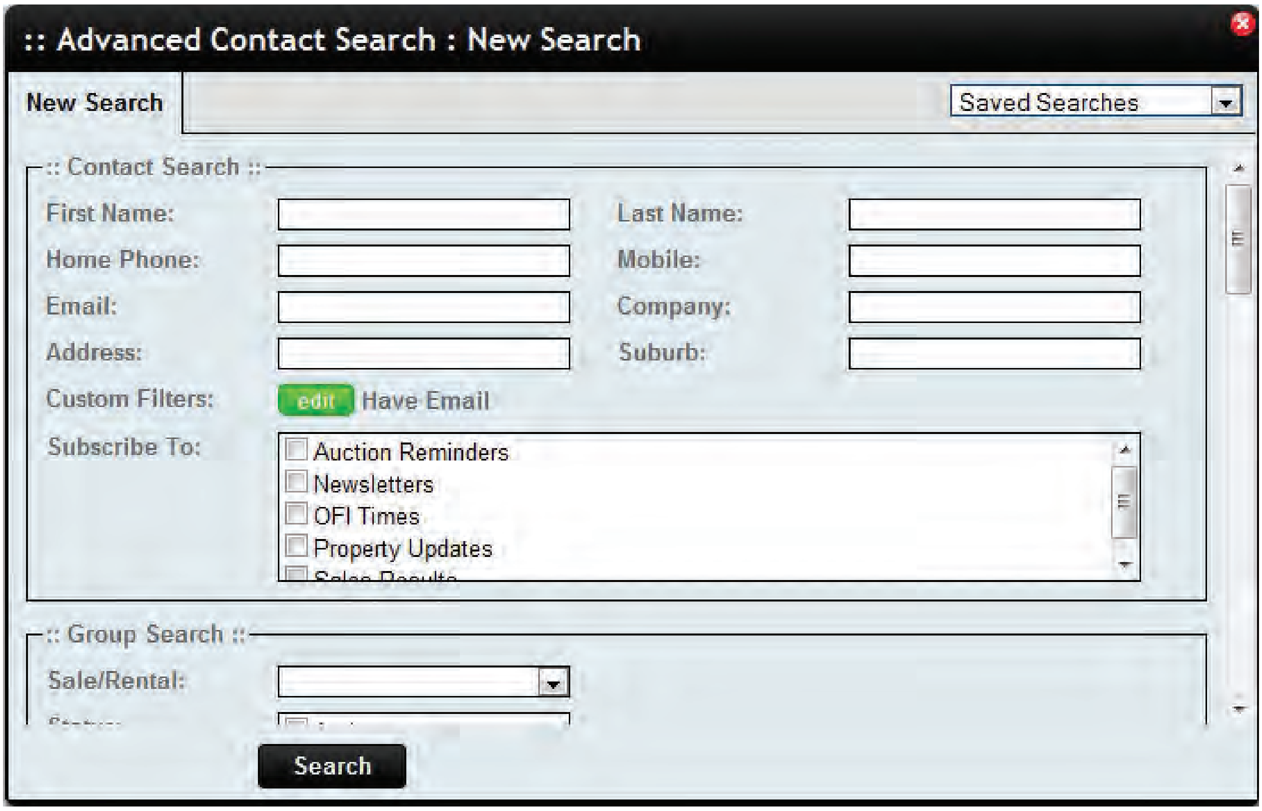
How do I send an E-Newsletter all Newsletter Subscribers?

1. Open an Advanced Contact Search

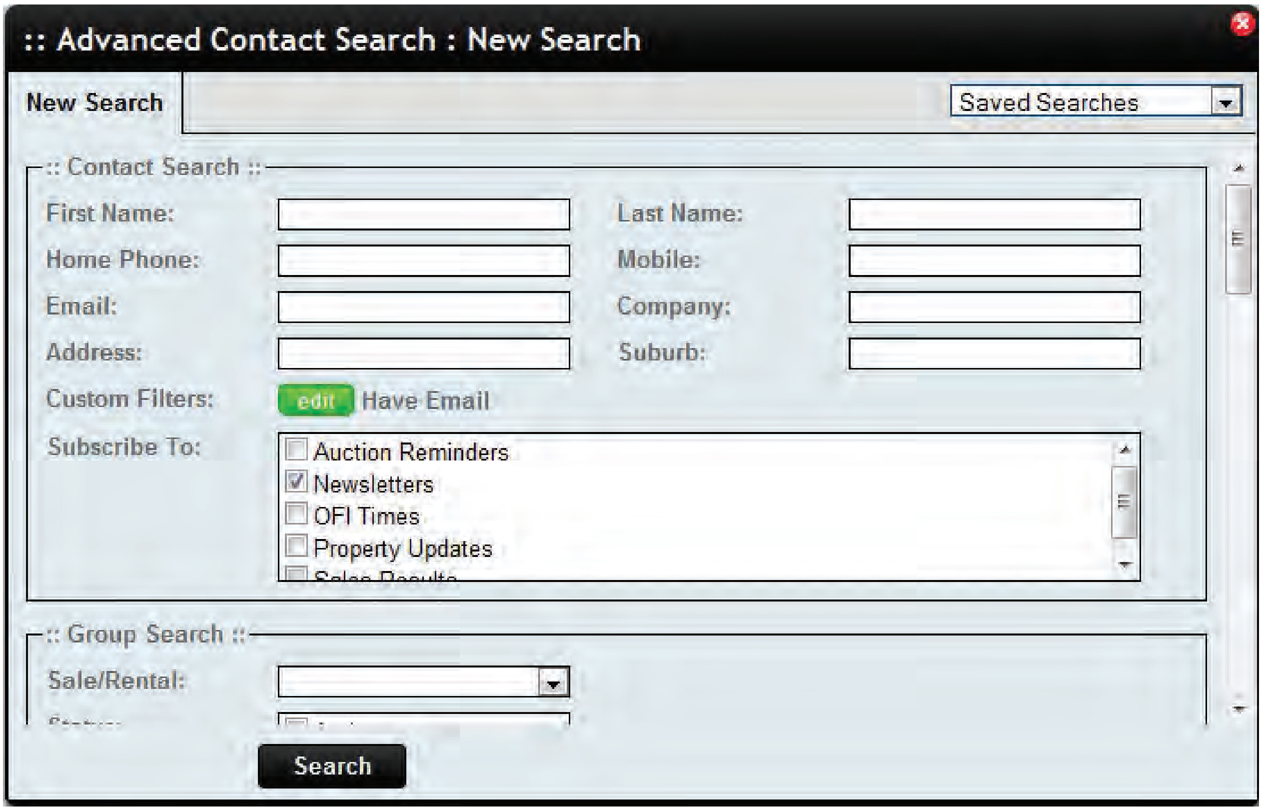


2. Add Filter: Have Email (this is not required however it will give you a more accurate target list. For example you might have 456 contacts in your search but only 324 have an email address).

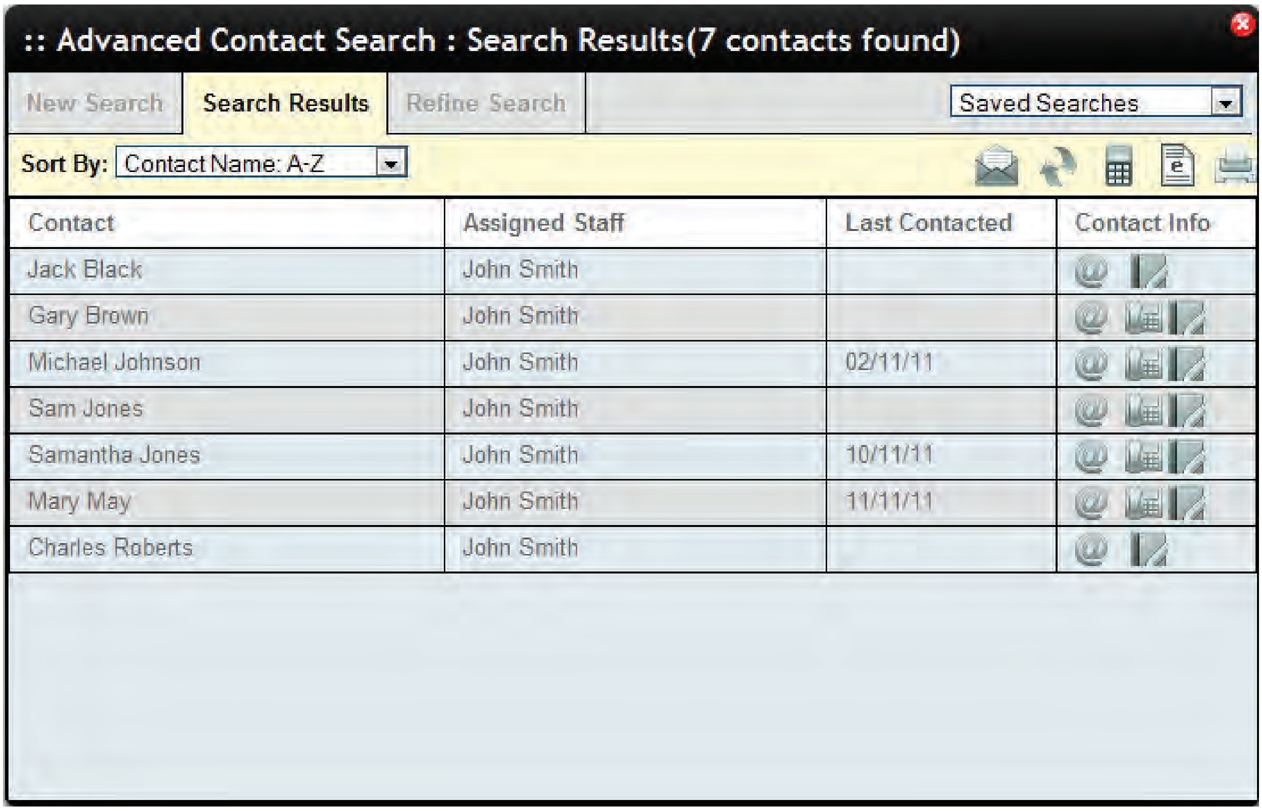
3. Click Save



3. Tick Newsletters under Subscribe To:



4. Click Search



5. Click on the E-Newsletter action icon

**Note: These contacts will appear as recipients.*

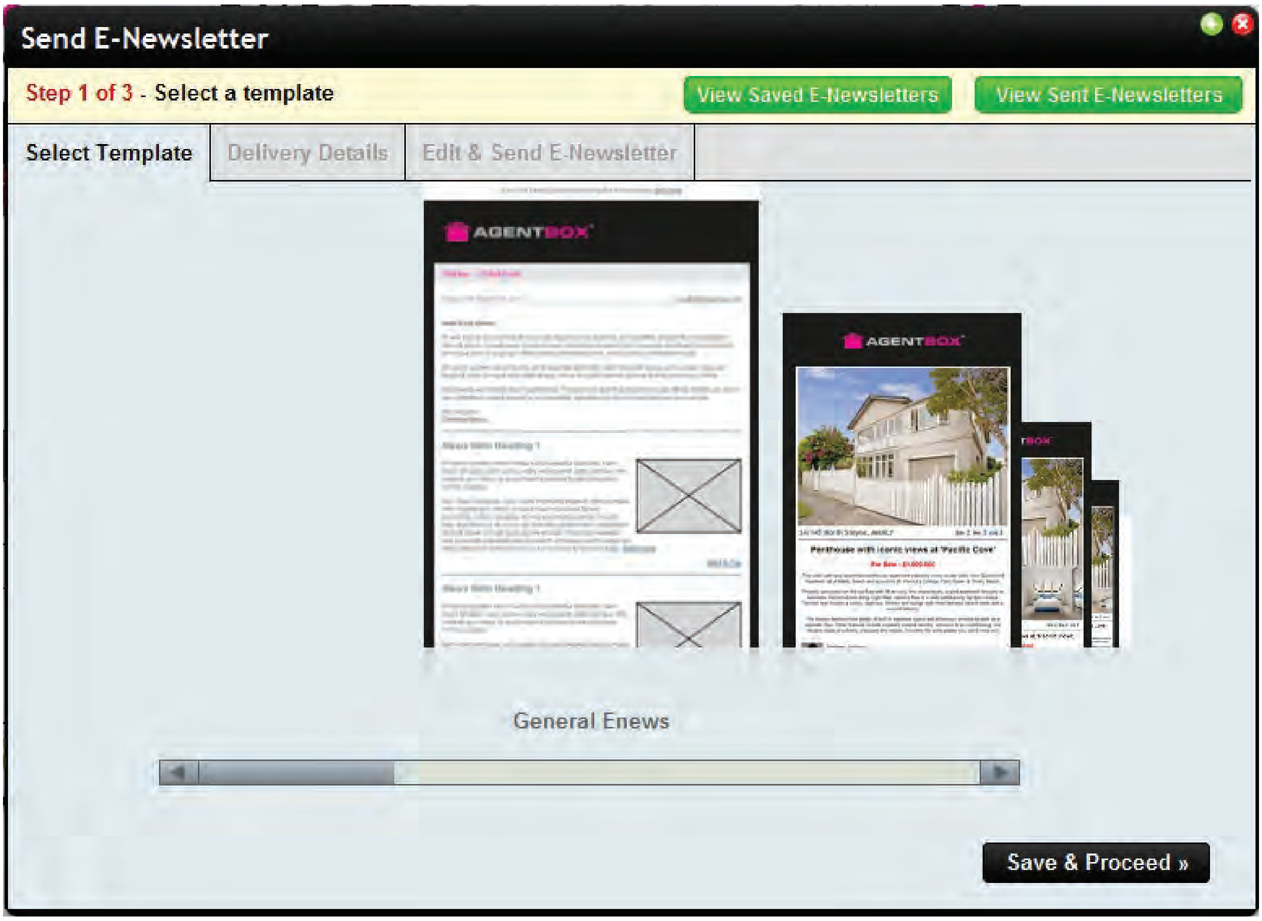
6. Follow the steps under [How to Create an E-Newsletter]

Create an E-Newsletter

How do I create an E-Newsletter?

You may send an E-Newsletter to a single contact or to a list of contacts (provided they are subscribed to receive E-Newsletters). To do this you can go through the property card, the contact card or following an advanced contact search. To generate an E-Newsletter, follow the steps below.

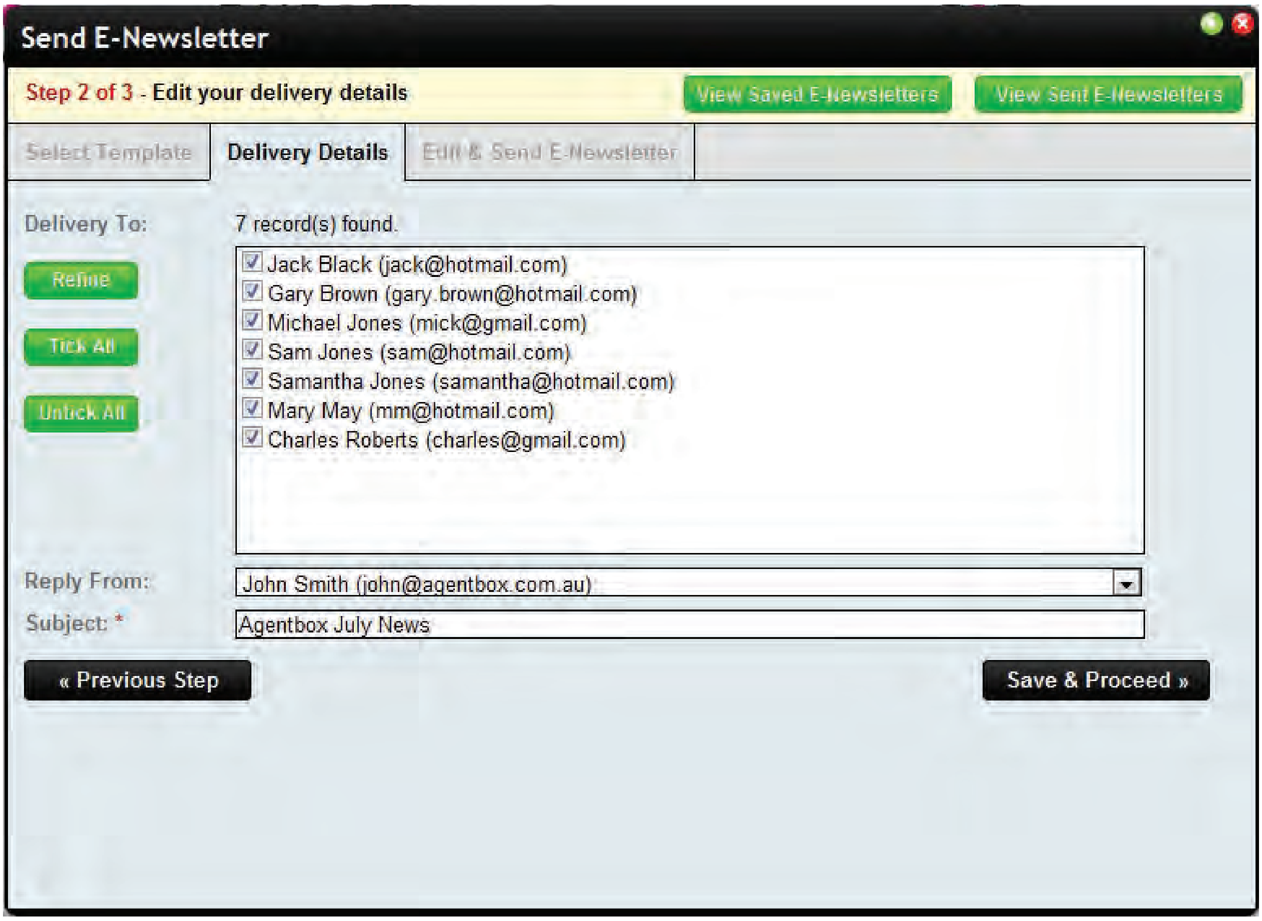
1. Click on the E-Newsletter Action icon .



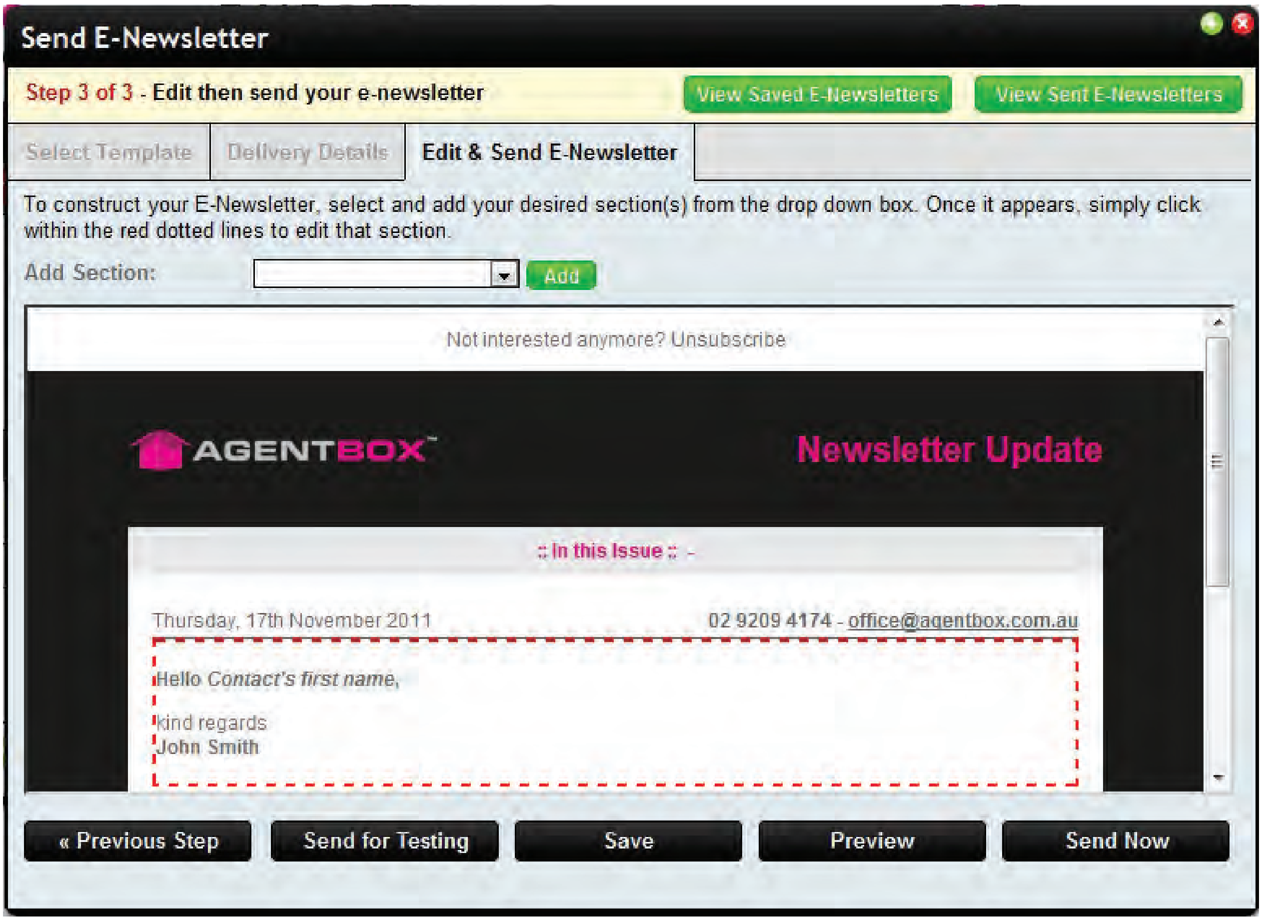
2. Select a template.

3. Refine the recipients list (not available if sending direct to a single contact via their contact card).

4. Enter the E-Newsletter Subject.



5. Add sections by selecting from the drop down menu and clicking add, to edit/remove a section click inside the red dotted lines and an edit box will open.



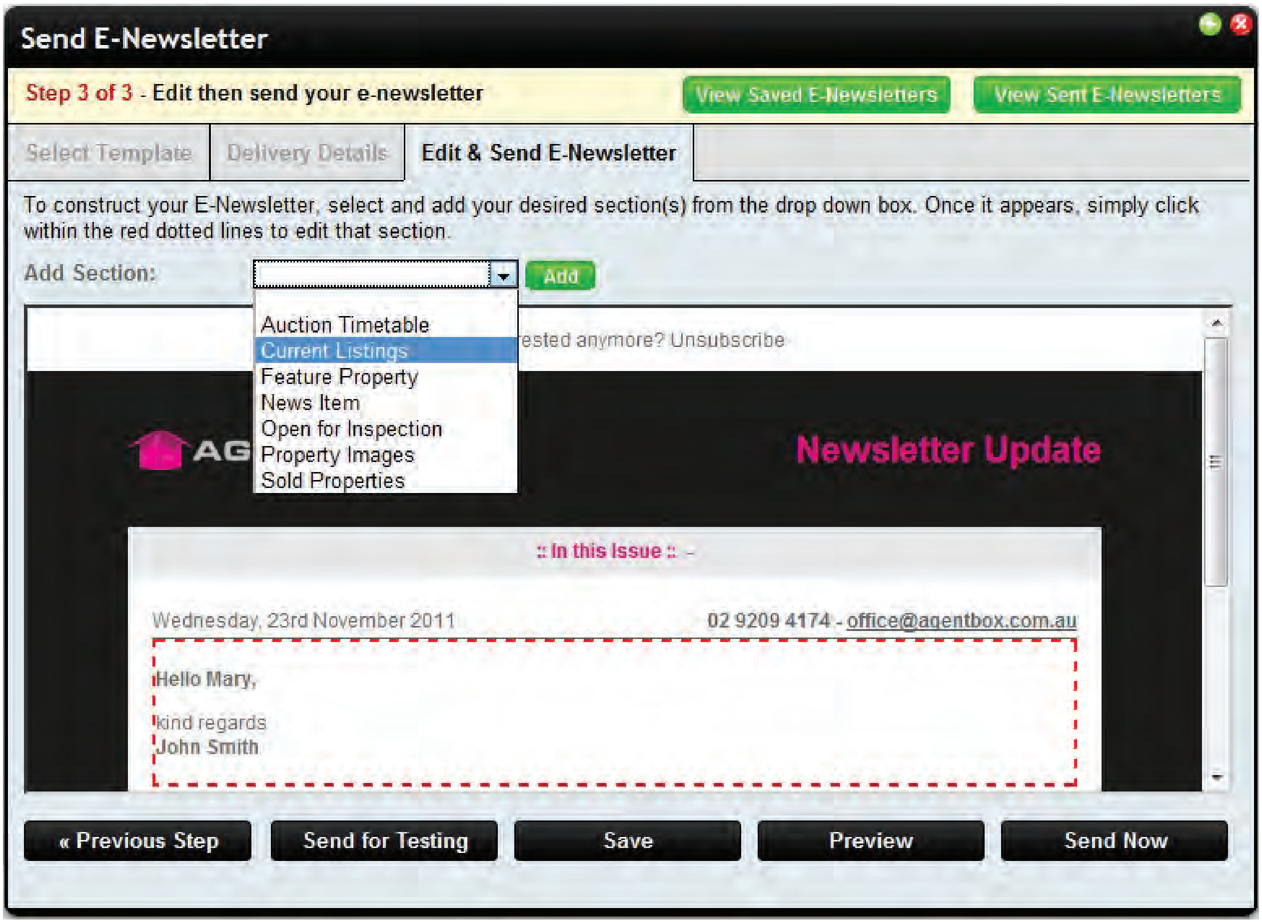
*Note:
- The sections will be inserted in the order you add them.
- If you create an e-newsletter via a property or advanced property search it can only be accessed from other properties or property searches.
- If you create an e-newsletter via a contact or advanced contact search it can only be accessed from other contacts or contact searches.

Add E-Newsletter Sections

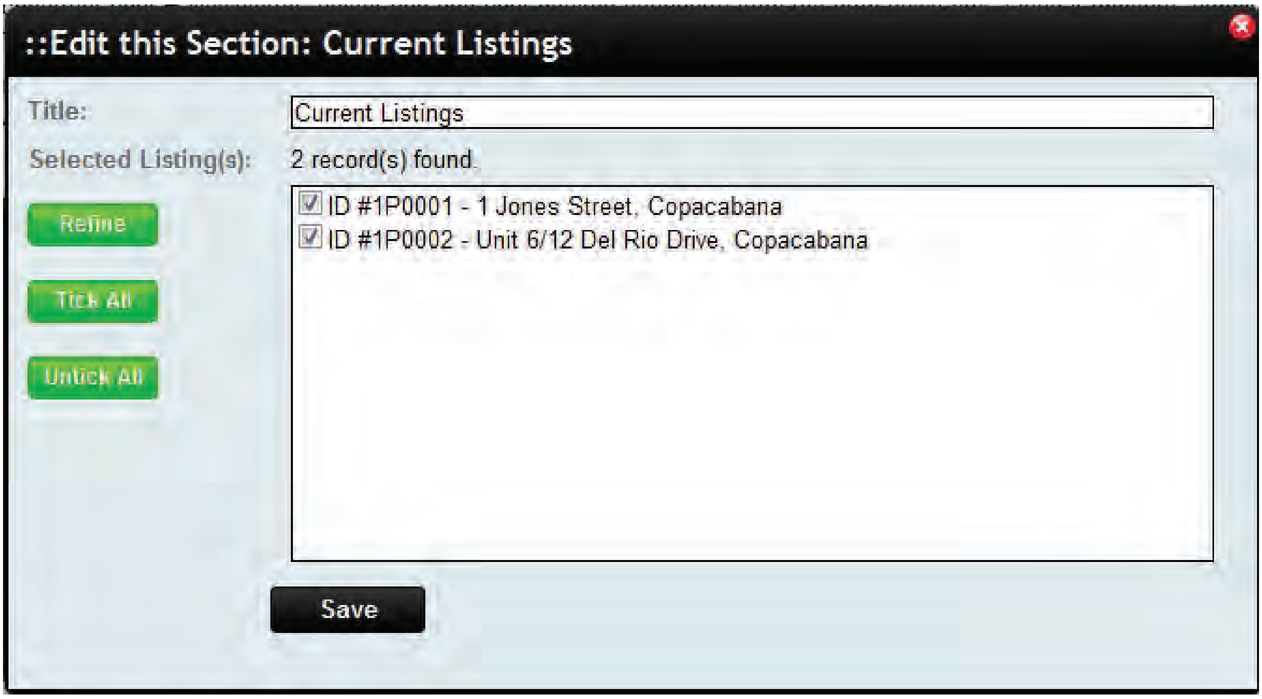
How do I enter an Auction Timetable, Current Listings, Feature Property, News Item, OFI or Sold Properties etc to my E-Newsletter in Agentbox?

1. Click on the Add Source drop down
2. Select Option
3. Click on Add

Current Listings will be used for this example:
4. Select Current Listings to add to your E-Newsletter

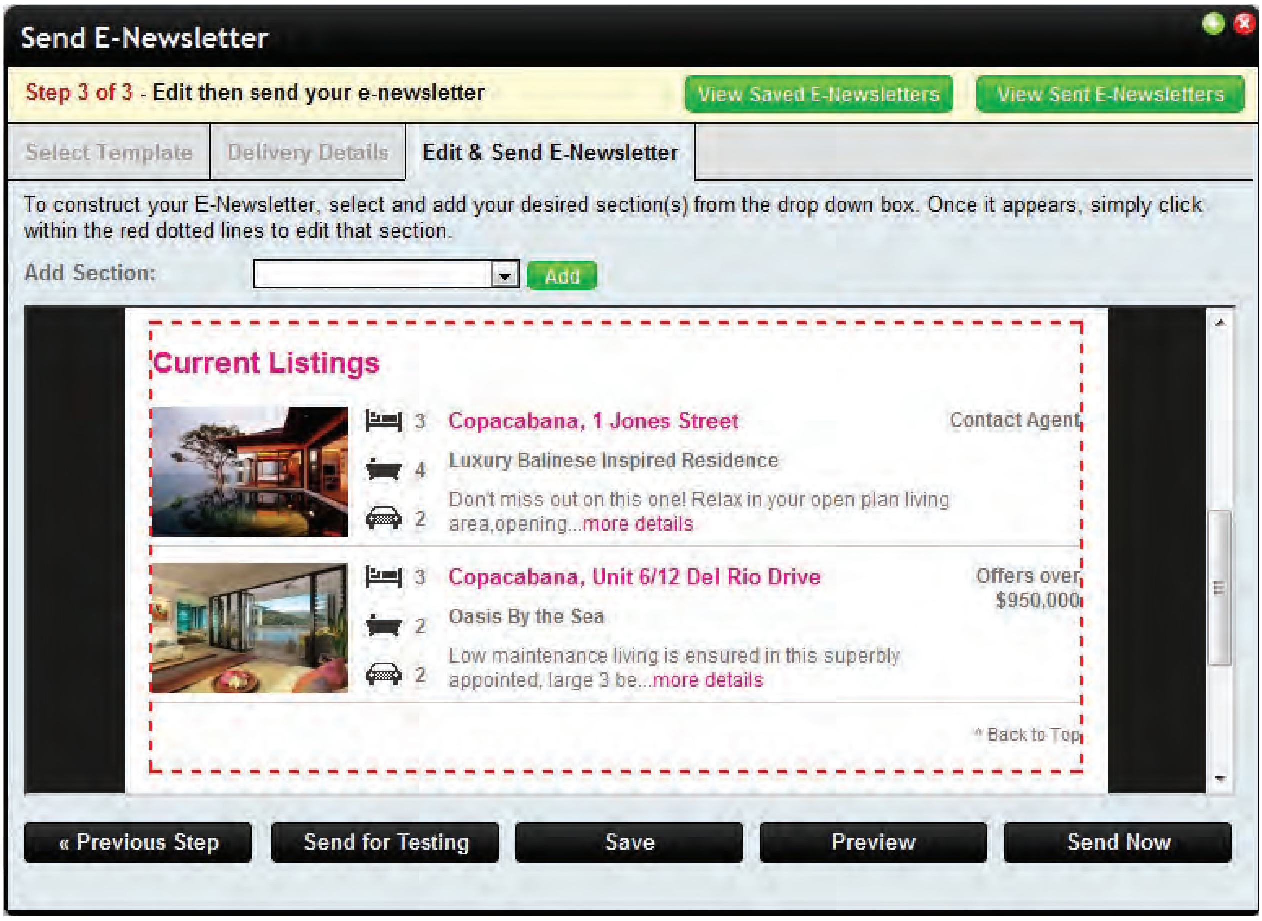


5. Click on Add



6. Click on Save

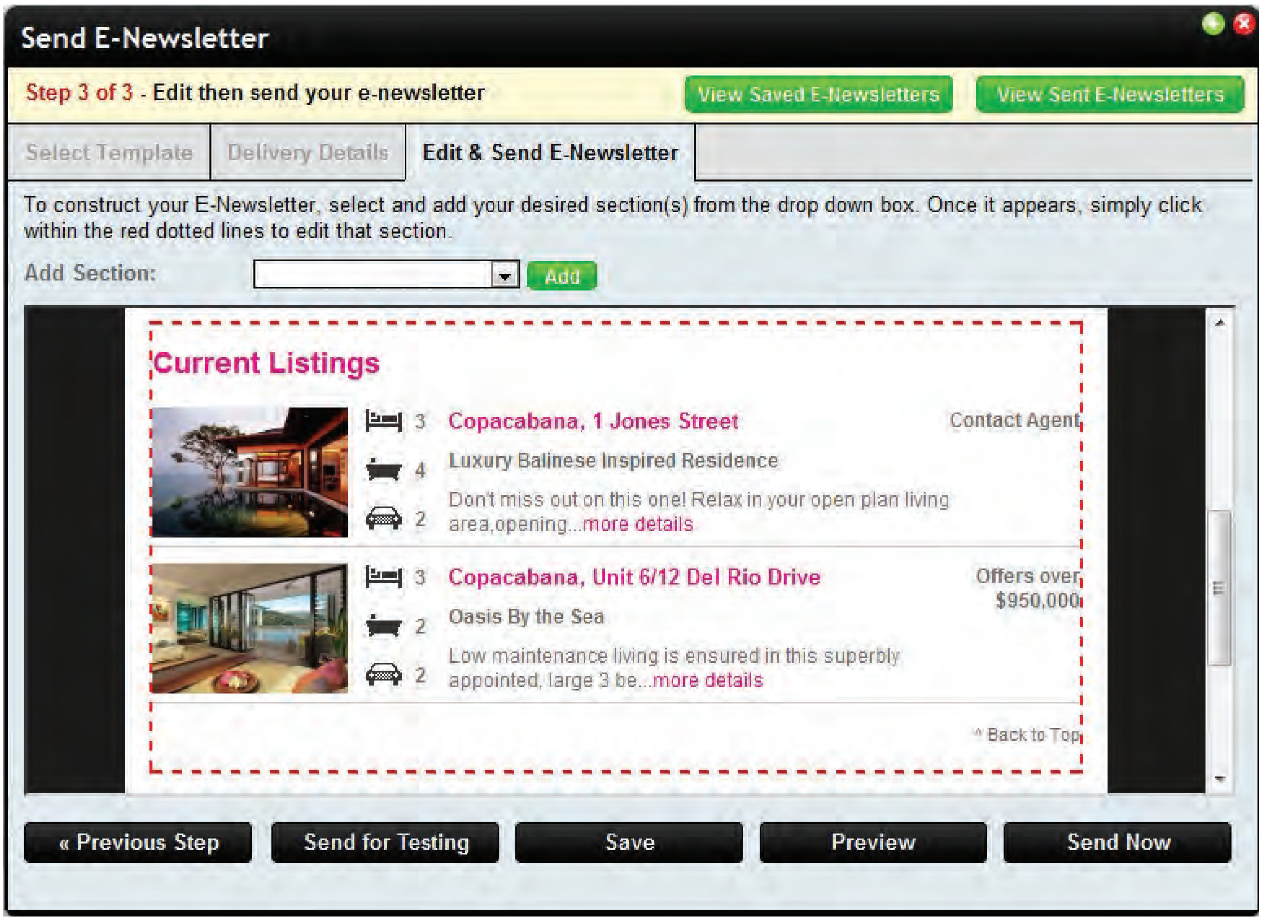
7. Current Listings will be added to your E-Newsletter



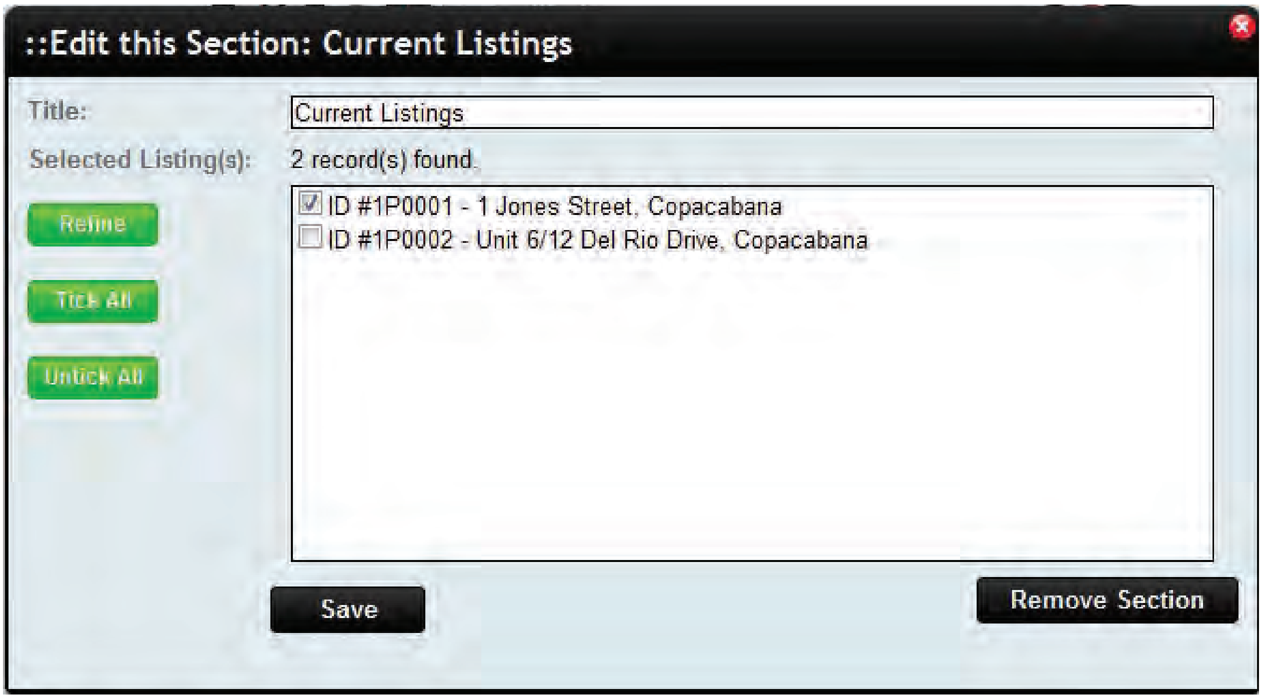
Edit E-Newsletter Section

How do I edit the content of my E-Newsletter?

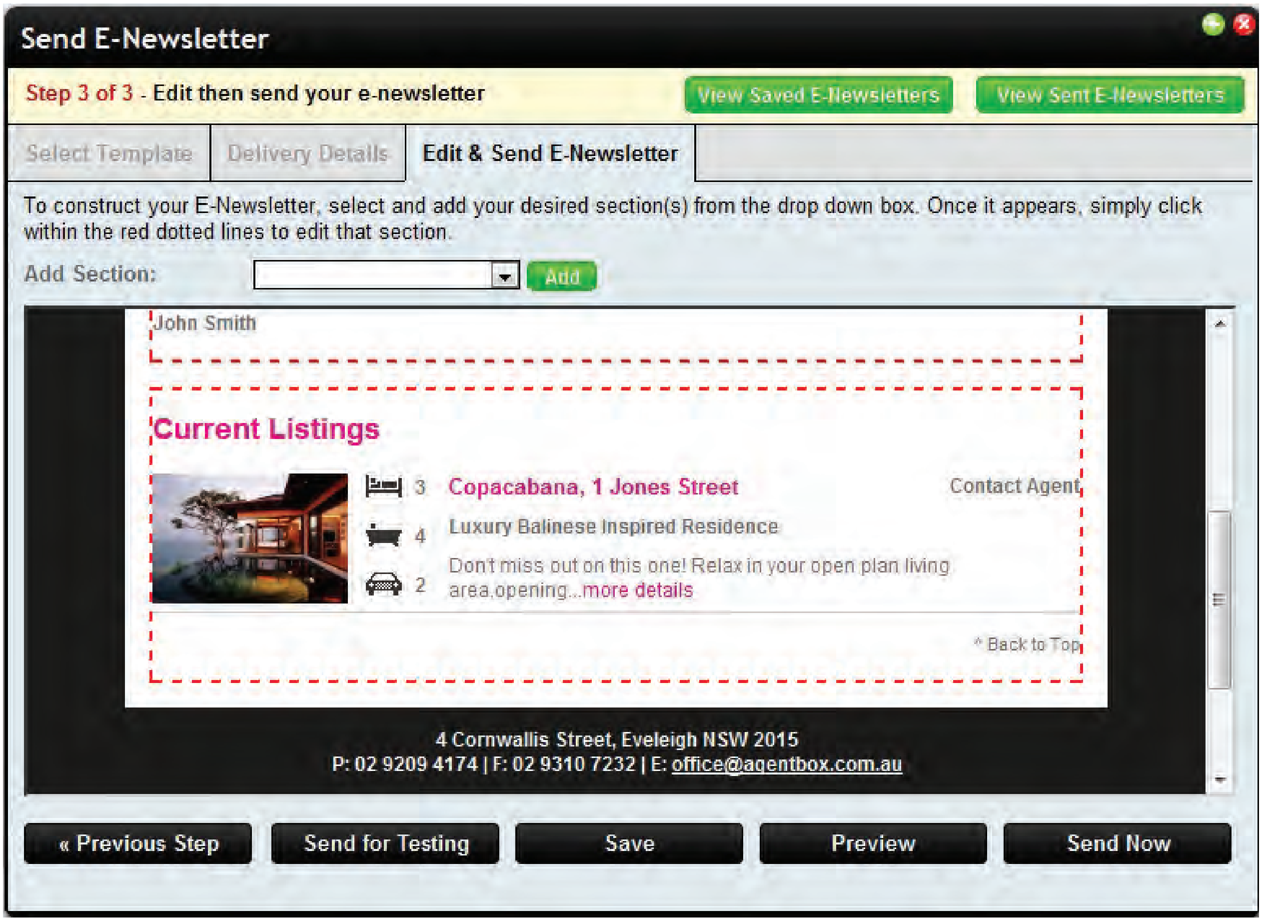
1. Click on the section highlighted by a red dashed line you wish to edit



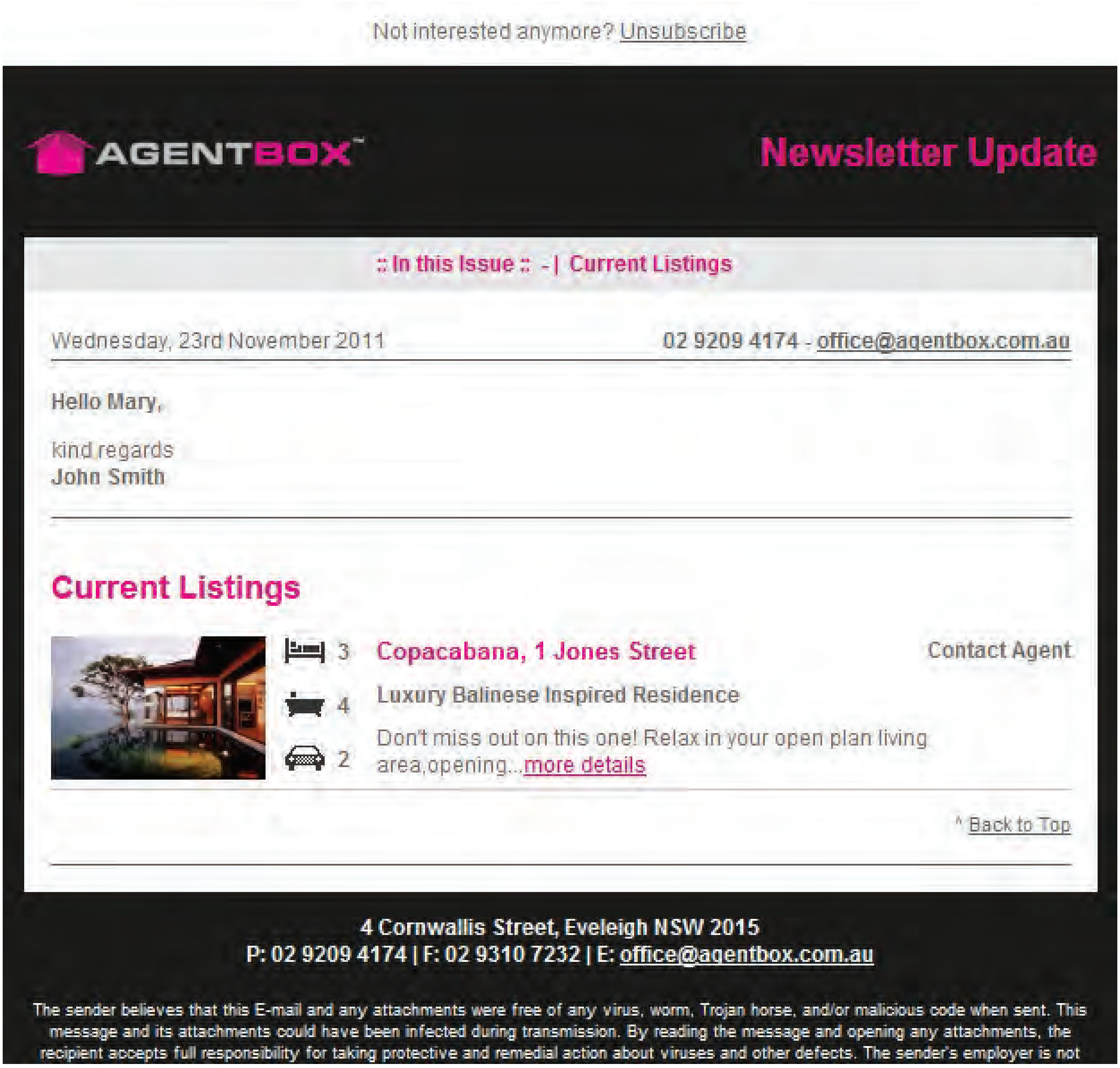
2. Edit as you wish



3. Click on Save



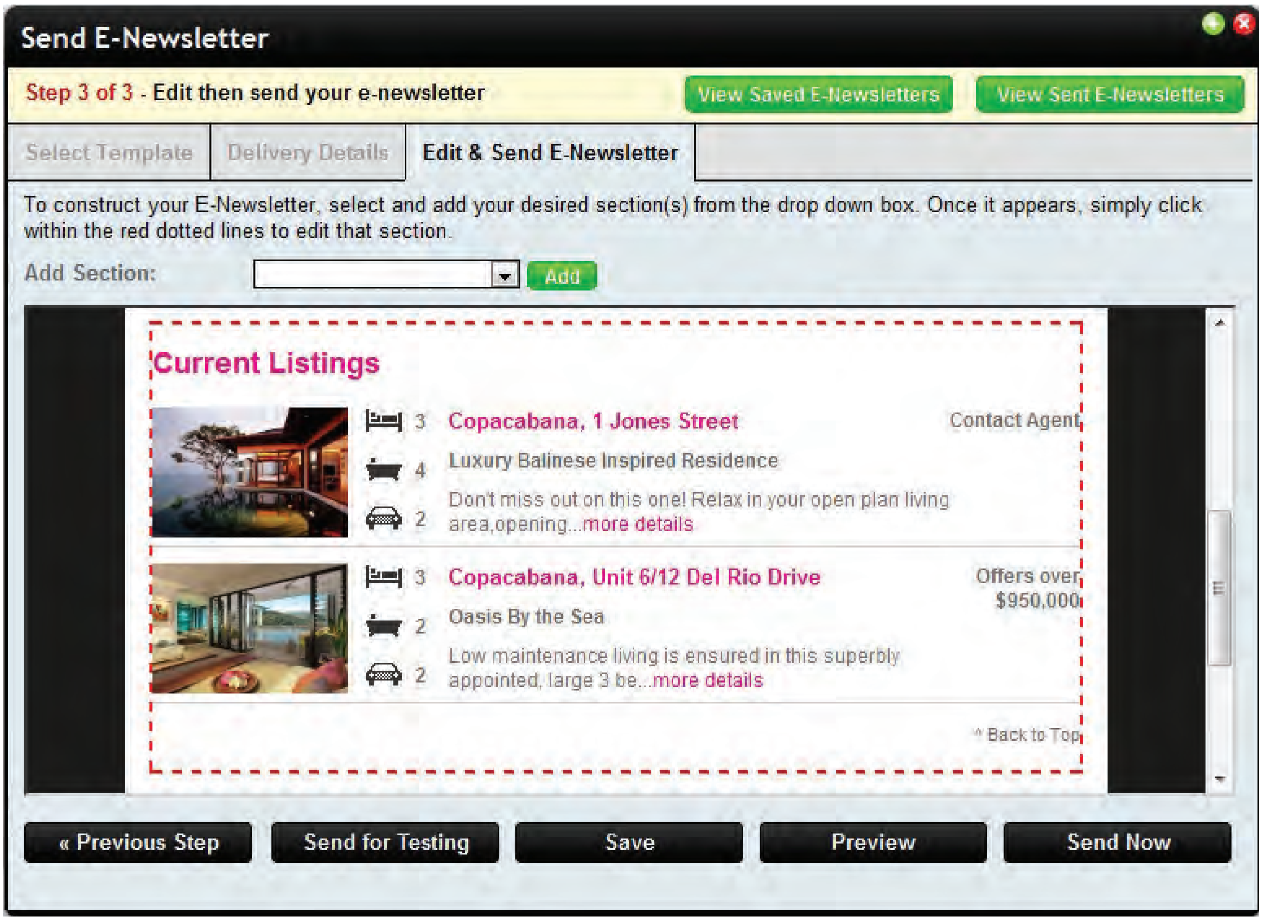
4. Click on Preview to view the contents of your Newsletter

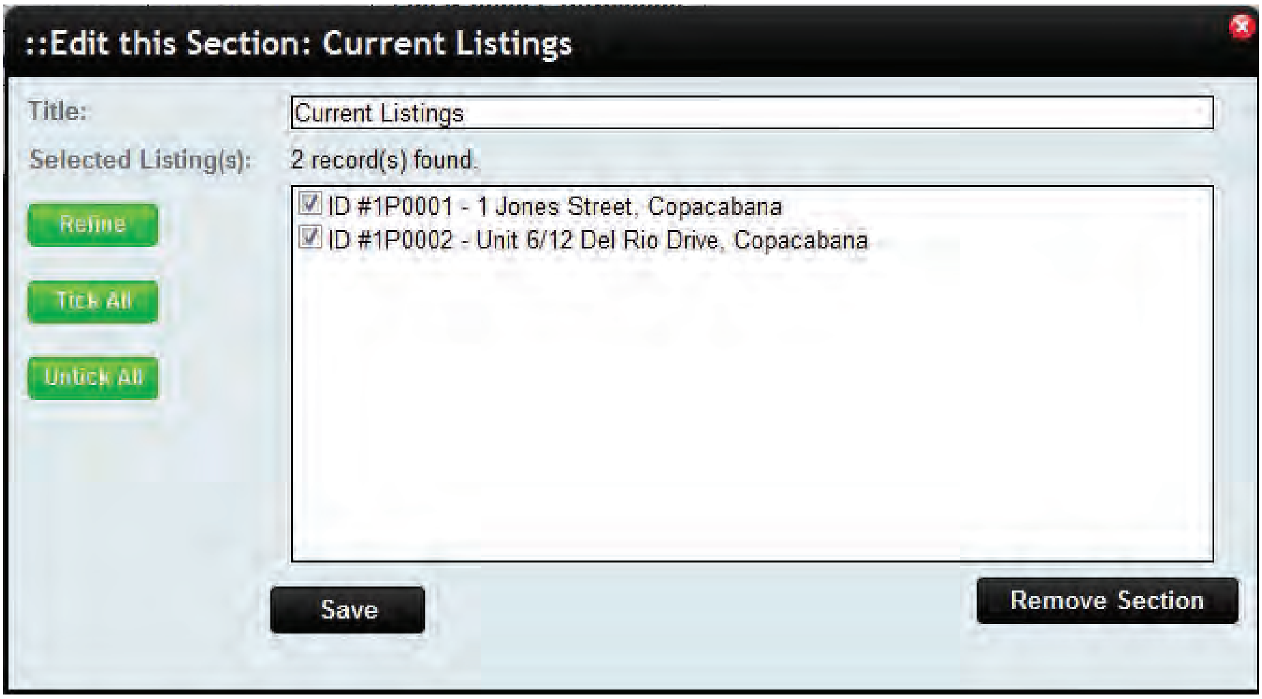


Remove E-Newsletter Sections

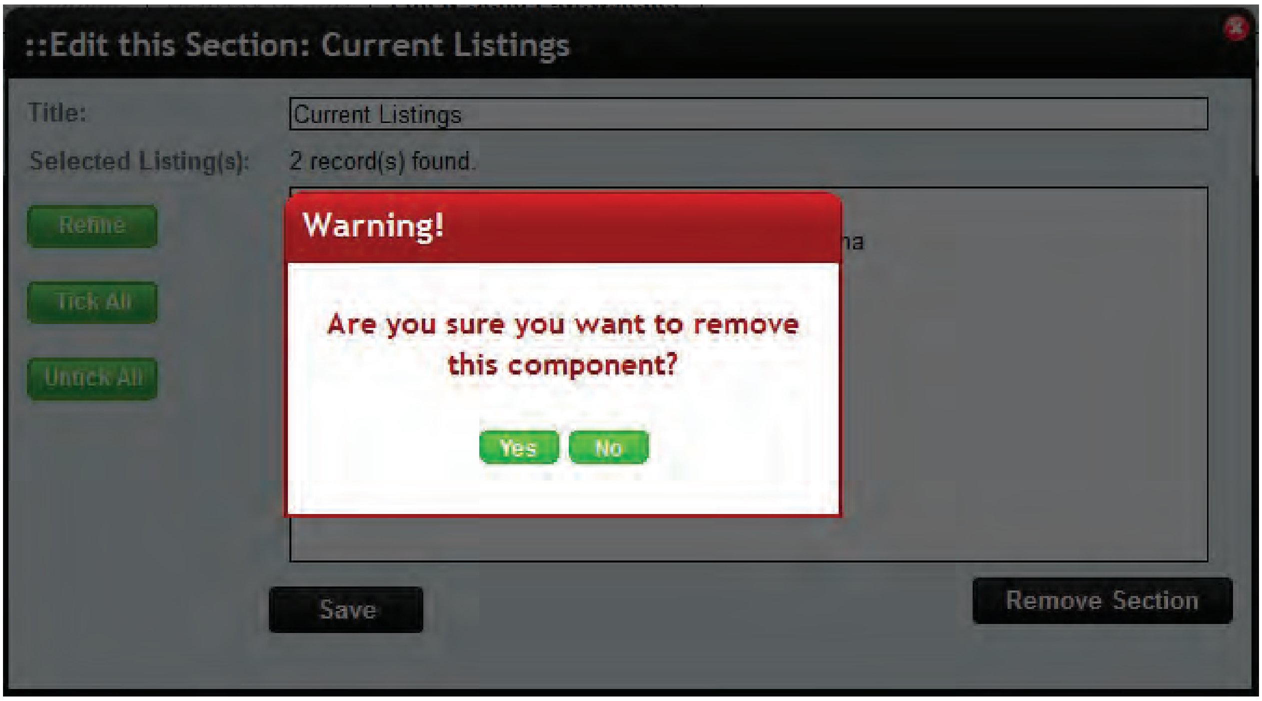
How do I remove a section placed in my E Newsletter in Agentbox?

1. Click on the area surrounded by a red dashed line you wish to remove

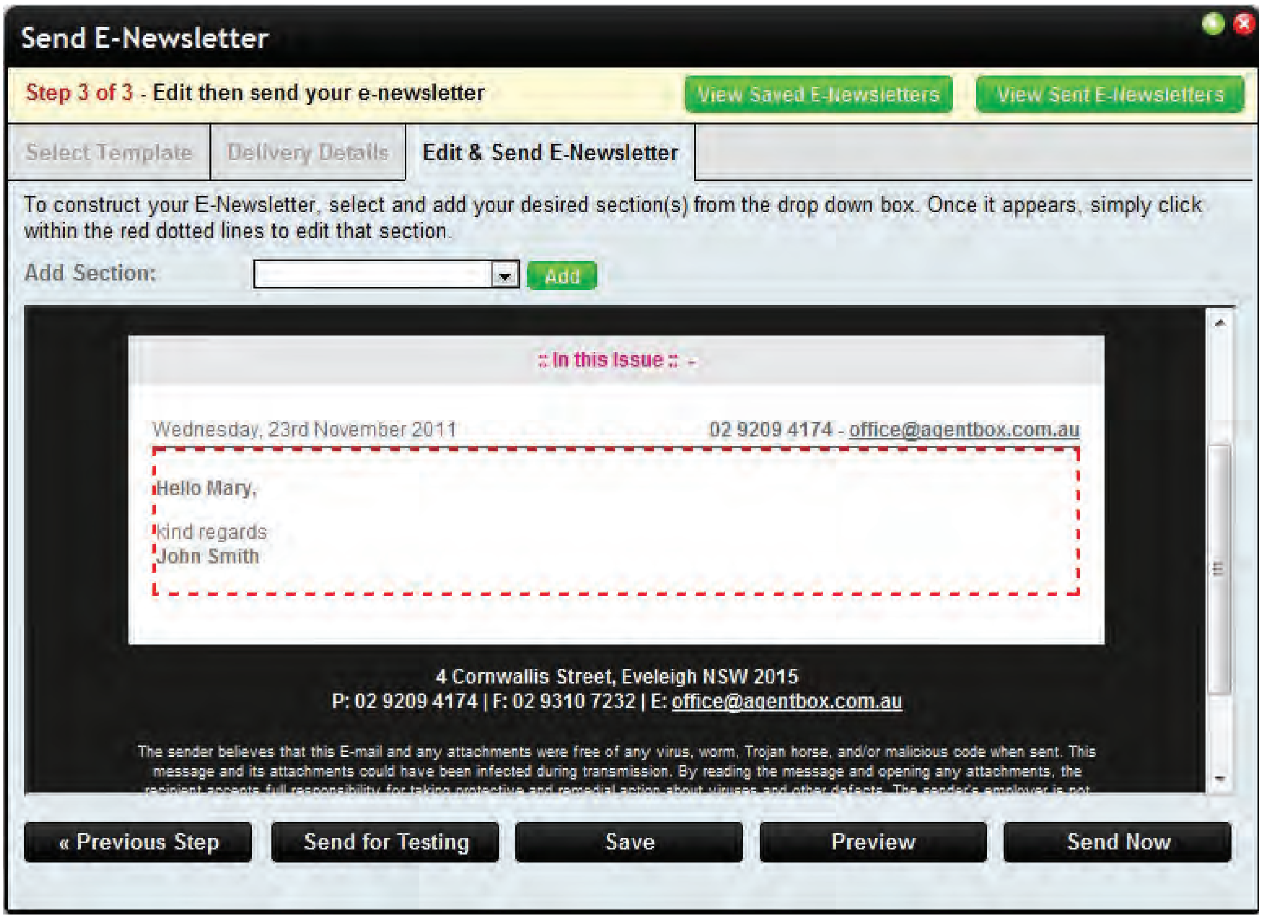




2. Click on Remove Section


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

3. Click Yes


Send E-Newsletter
Step 3 of 3 - Edit then send your e-newsletter
View Saved E-Newsletters
View Sent E-Newsletters
Select Template
Delivery Details
Edit & Send E-Newsletter
To construct your E-Newsletter, select and add your desired section(s) from the drop down box. Once it appears, simply click within the red dotted lines to edit that section.
Add Section:
Add
:: In this Issue ::
Wednesday, 23rd November 2011
02 9209 4174 - office@agentbox.com.au
Hello Mary,
kind regards
John Smith
4 Cornwallis Street, Eveleigh NSW 2015
P: 02 9209 4174 | F: 02 9310 7232 | E: office@agentbox.com.au
The sender believes that this E-mail and any attachments were free of any virus, worm, Trojan horse, and/or malicious code when sent. This message and its attachments could have been infected during transmission. By reading the message and opening any attachments, the
« Previous Step
Send for Testing
Save
Preview
Send Now

General FAQ

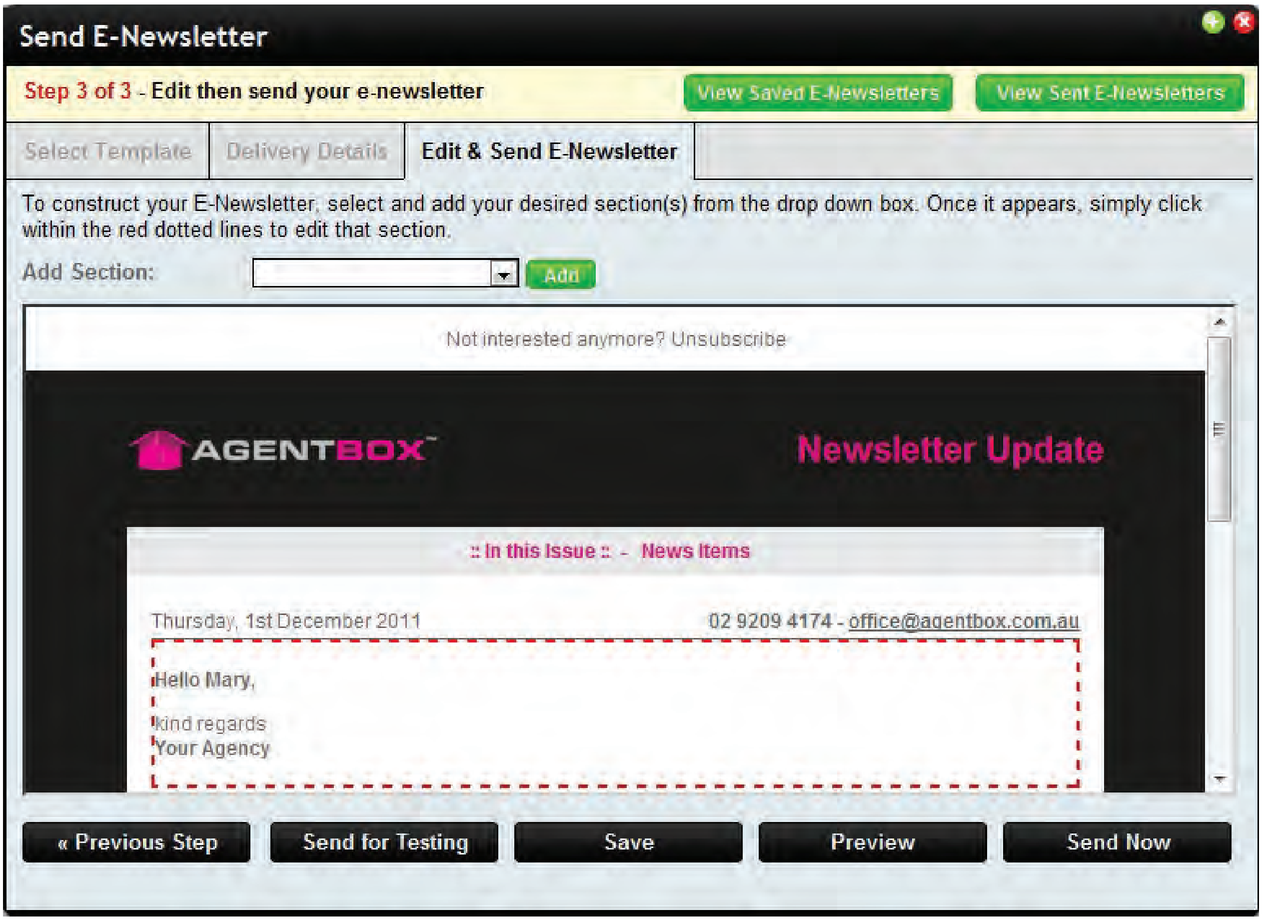
Frequently Asked Questions

Below are commonly asked questions to our support team. If you can't find the answer here you can contact the support team between 9am - 5pm Sydney time, Monday to Friday on (02) 9209 4174 or email support@agentbox.com.au.

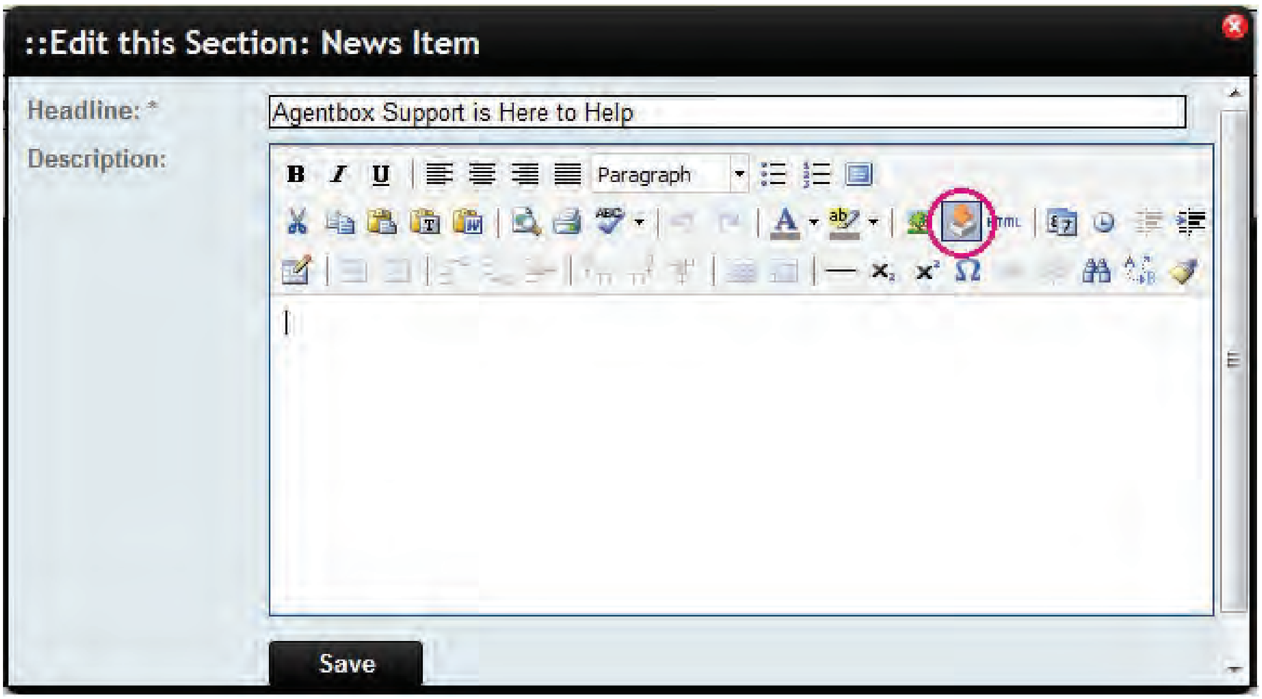
Insert Images to E-Newsletters

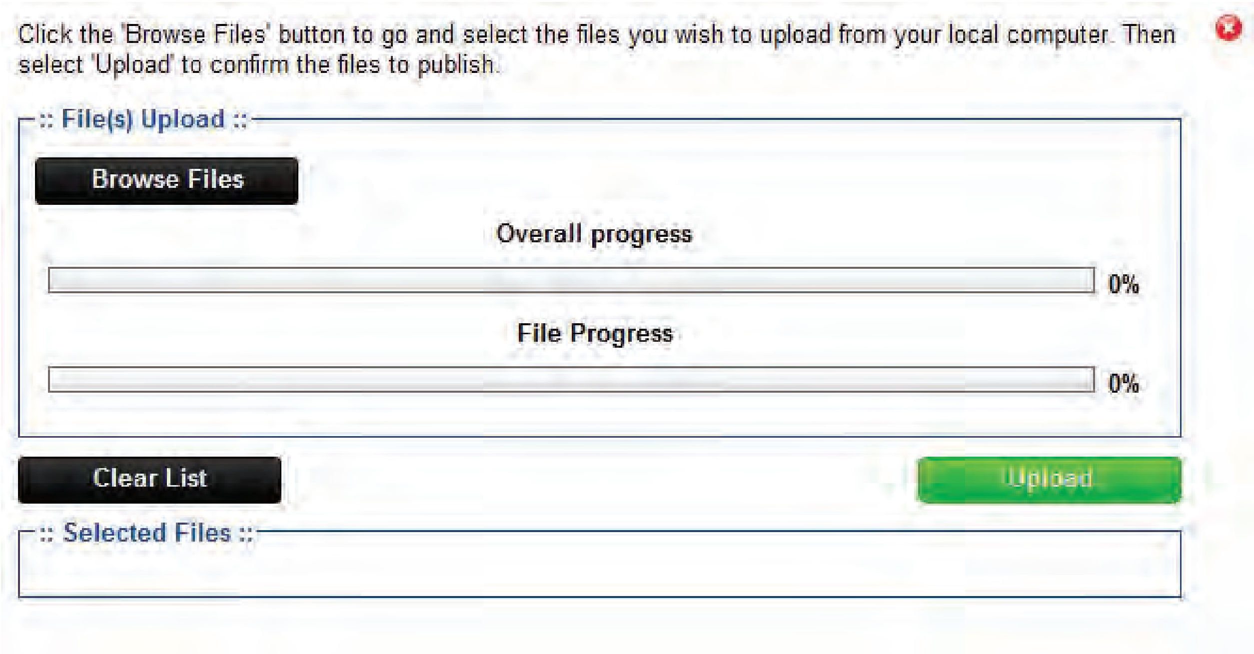
How to Insert Custom Images into E-Newsletters

1. Open an E-Newsletter Template.
2. Click within the red dotted box to edit an existing section or add a new E-Newsletter section from the Add Section drop down.

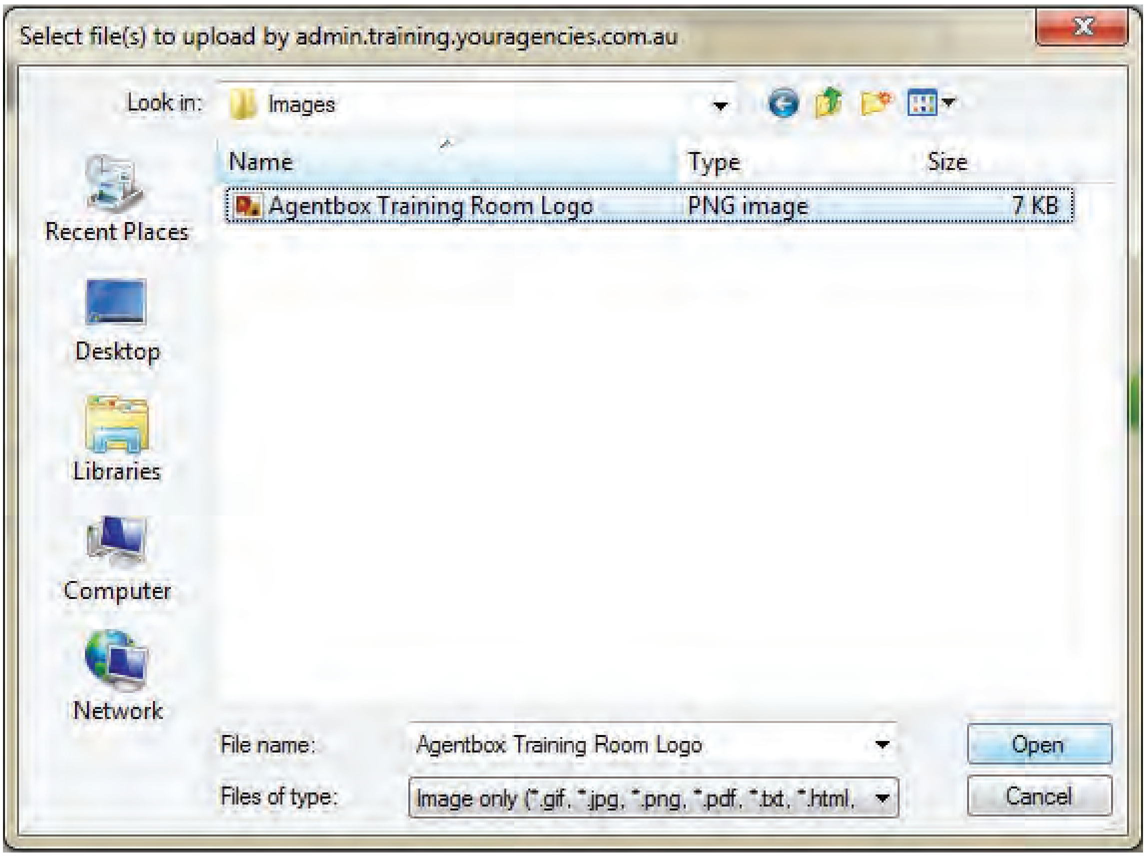


3. Click on the Custom Upload icon

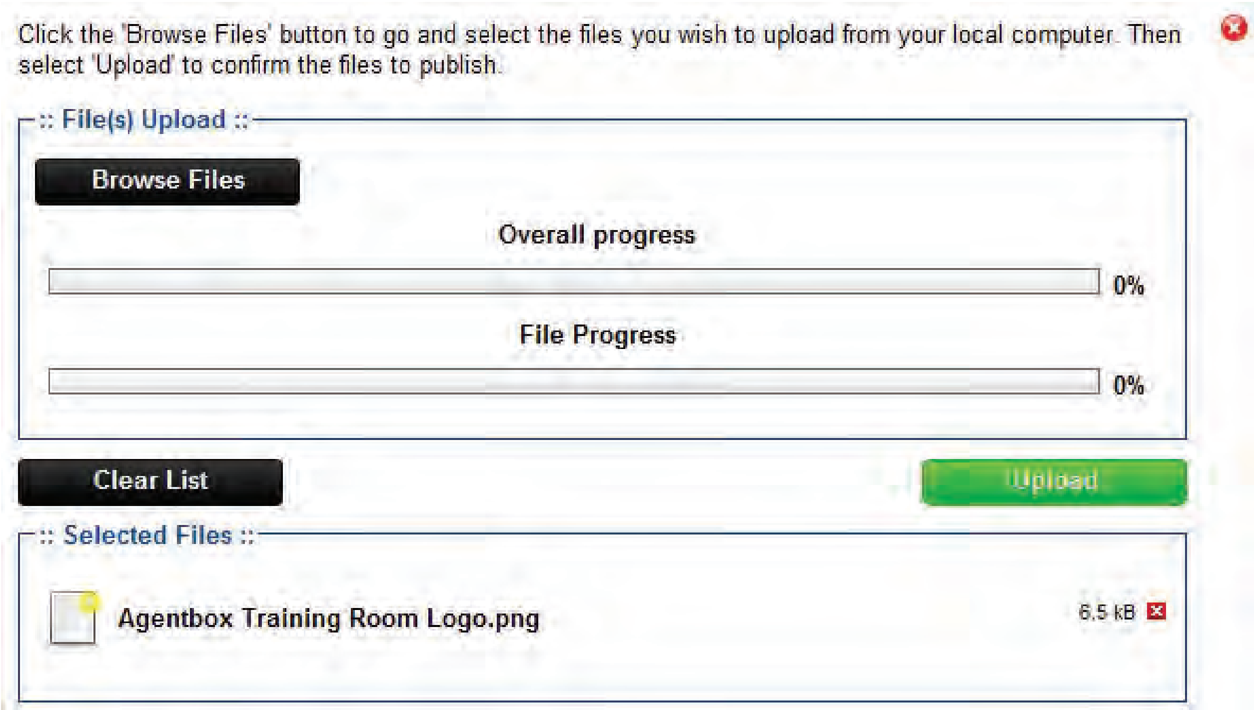




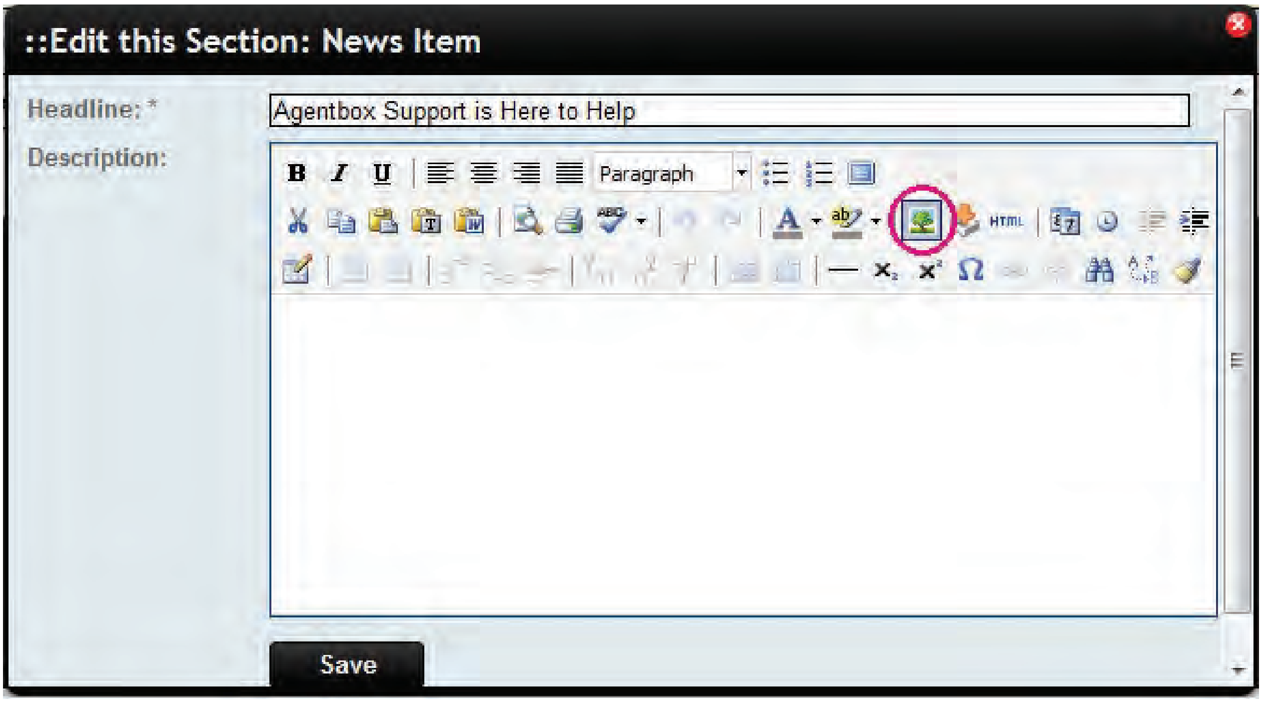
4. Select Browse and select the image you want to upload and click Open.

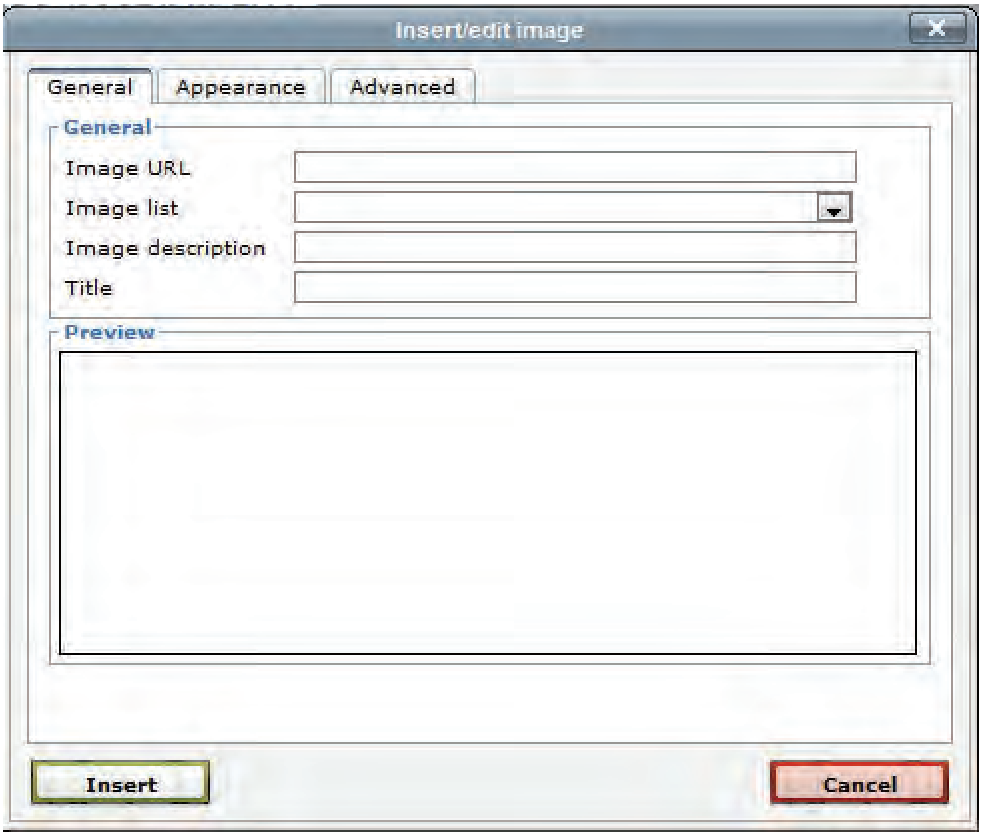


5. Click Upload

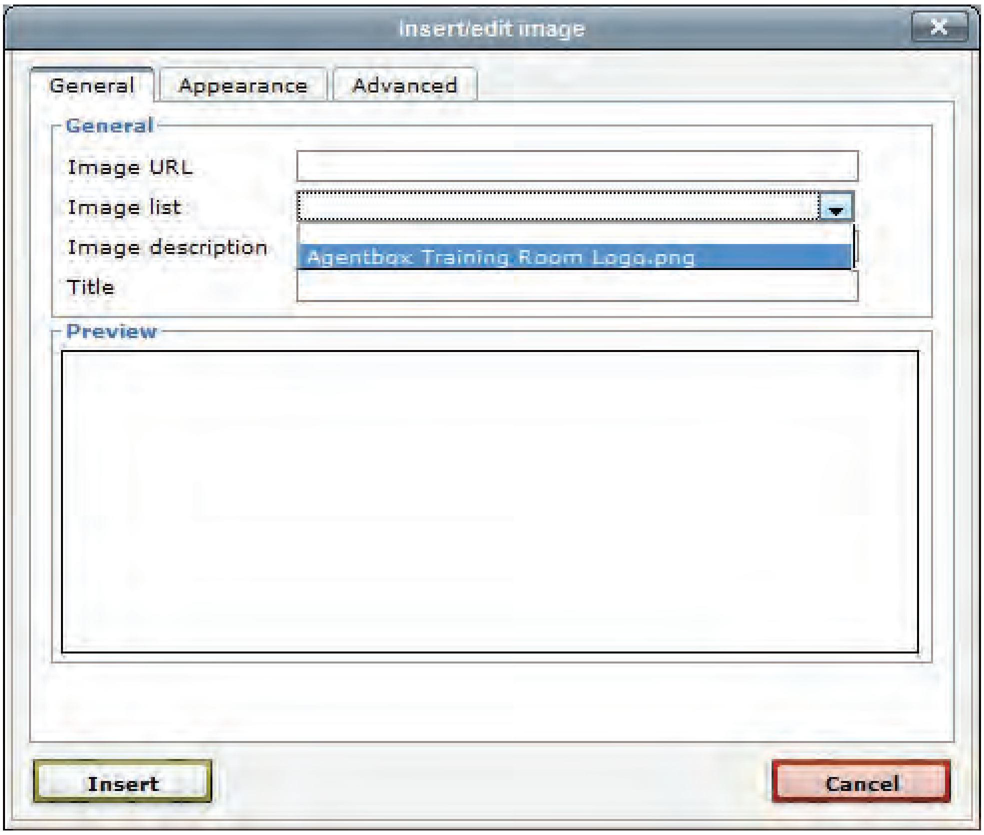


6. Select the insert image icon .

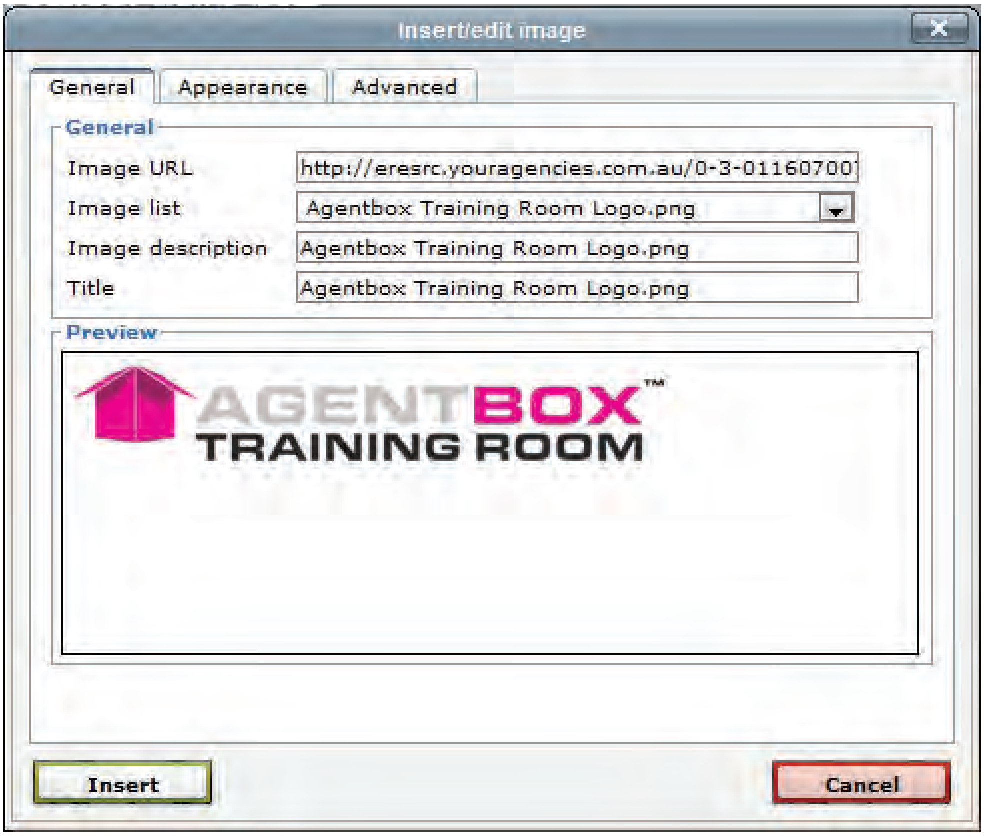




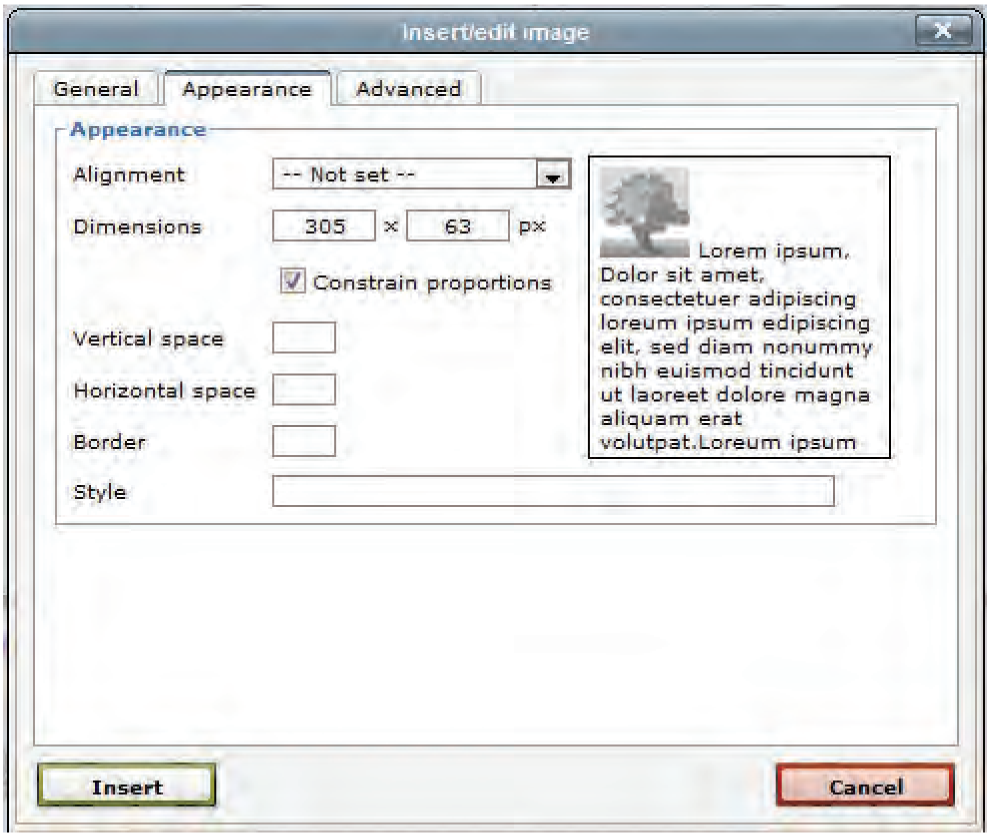
7. Select the image from the image list drop down.



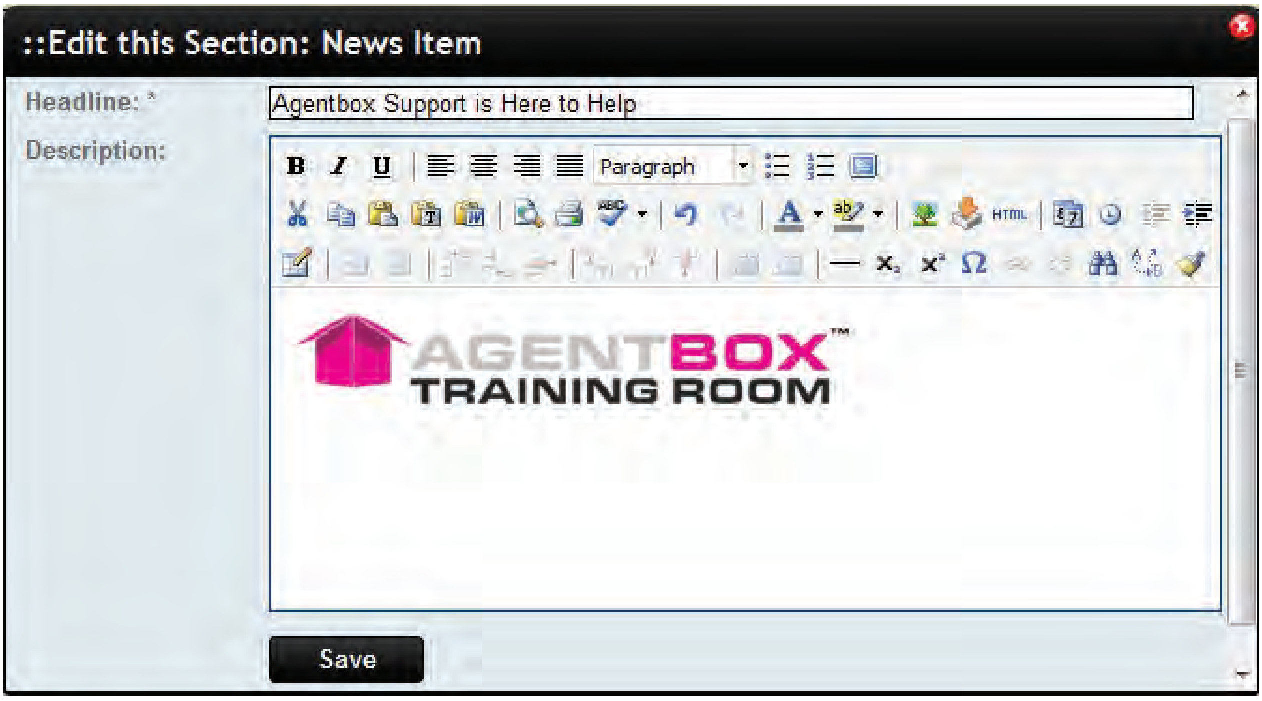
8. Image will appear in window.



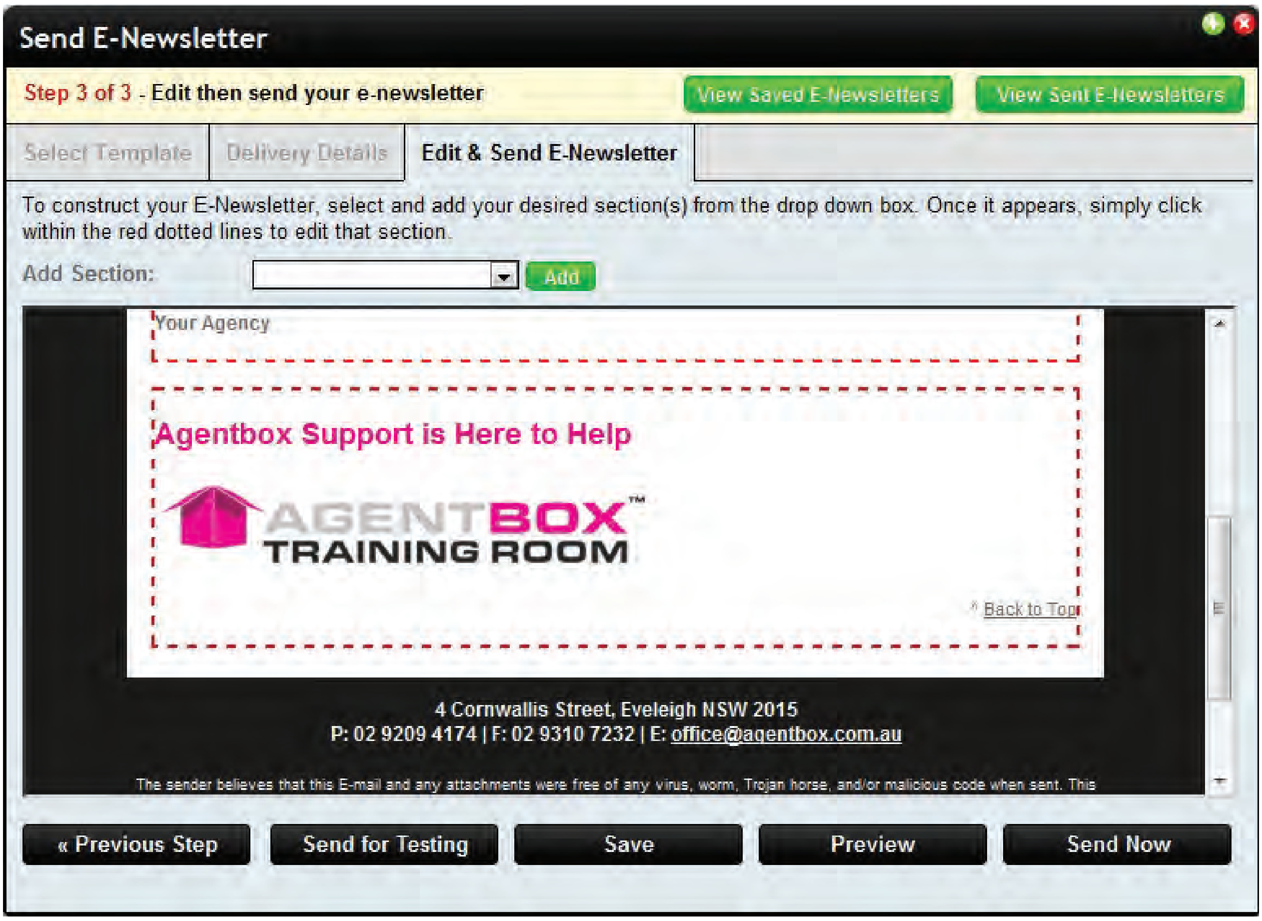
9. You can edit the positioning and dimensions of the image in the Appearance tab.



10. Click insert



11. Click Save

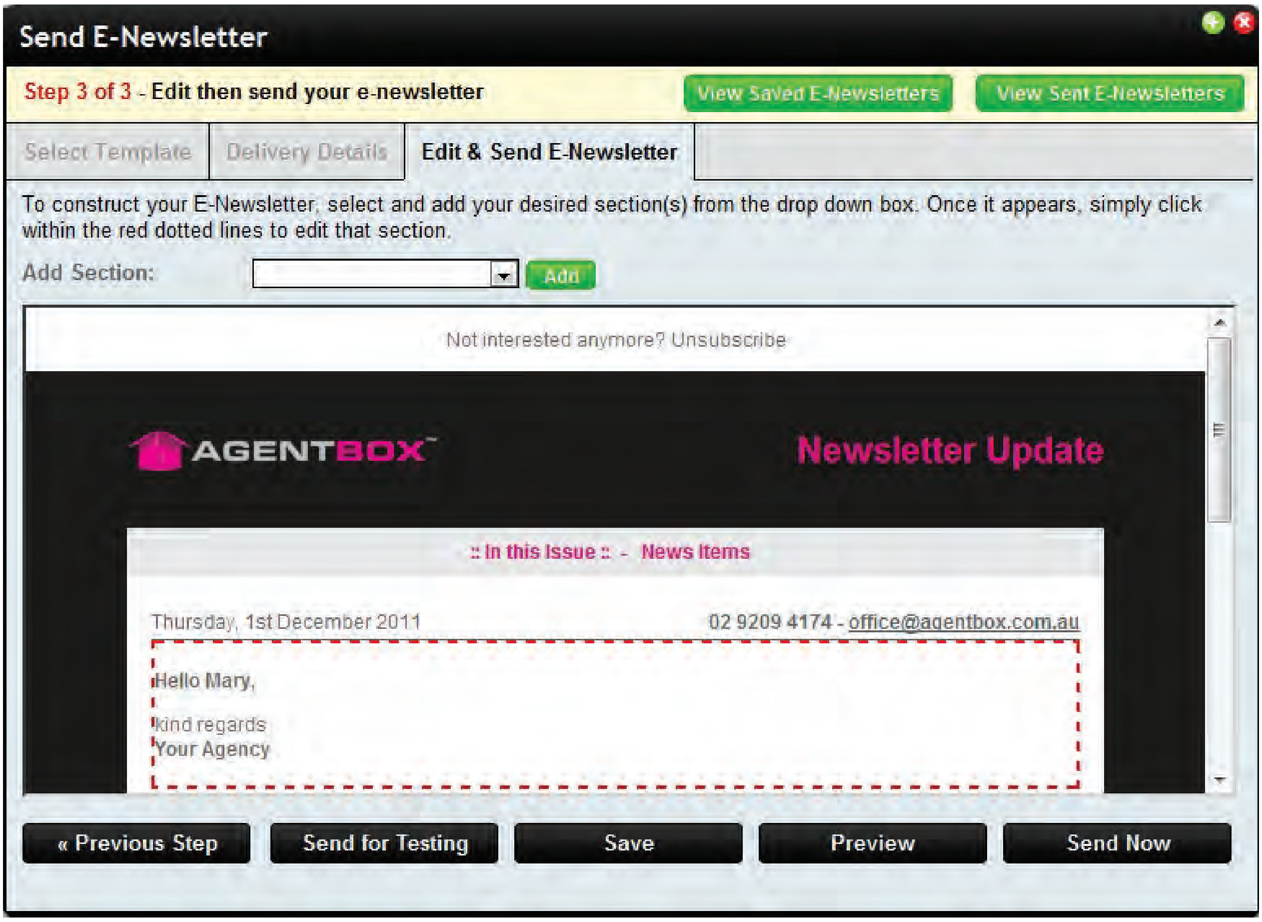


Insert Links to E-Newsletters

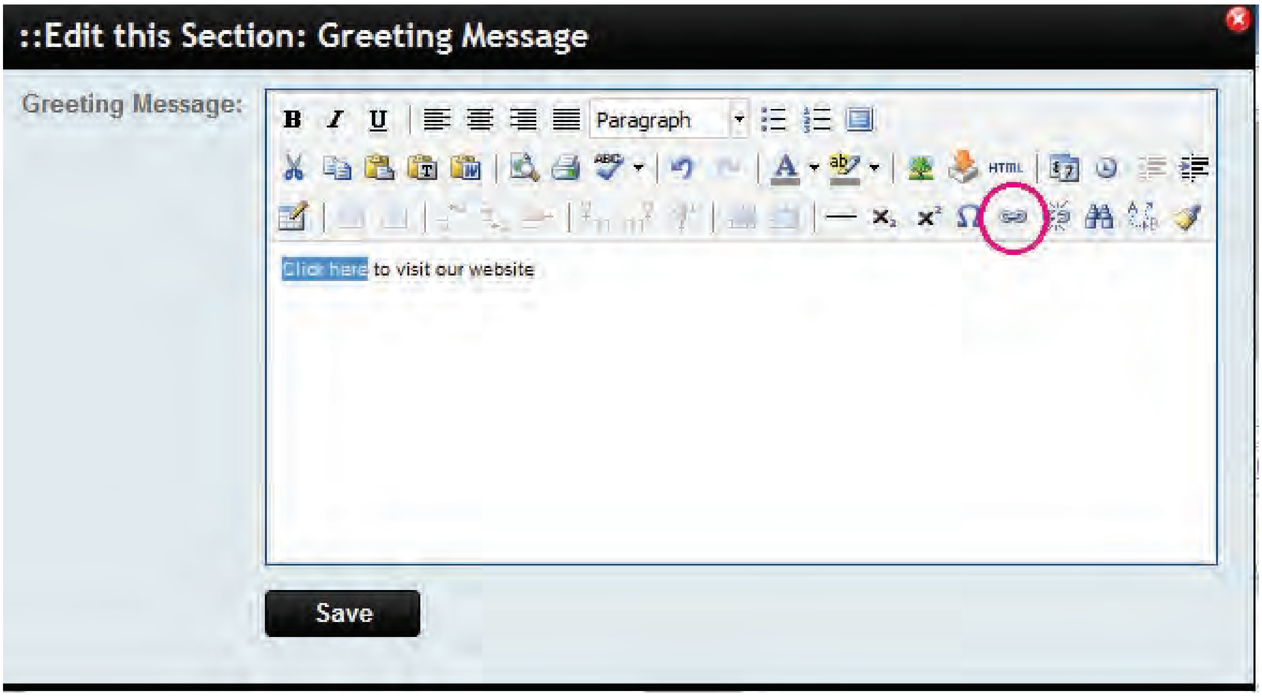
How to Insert Custom Links into E-Newsletter

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.

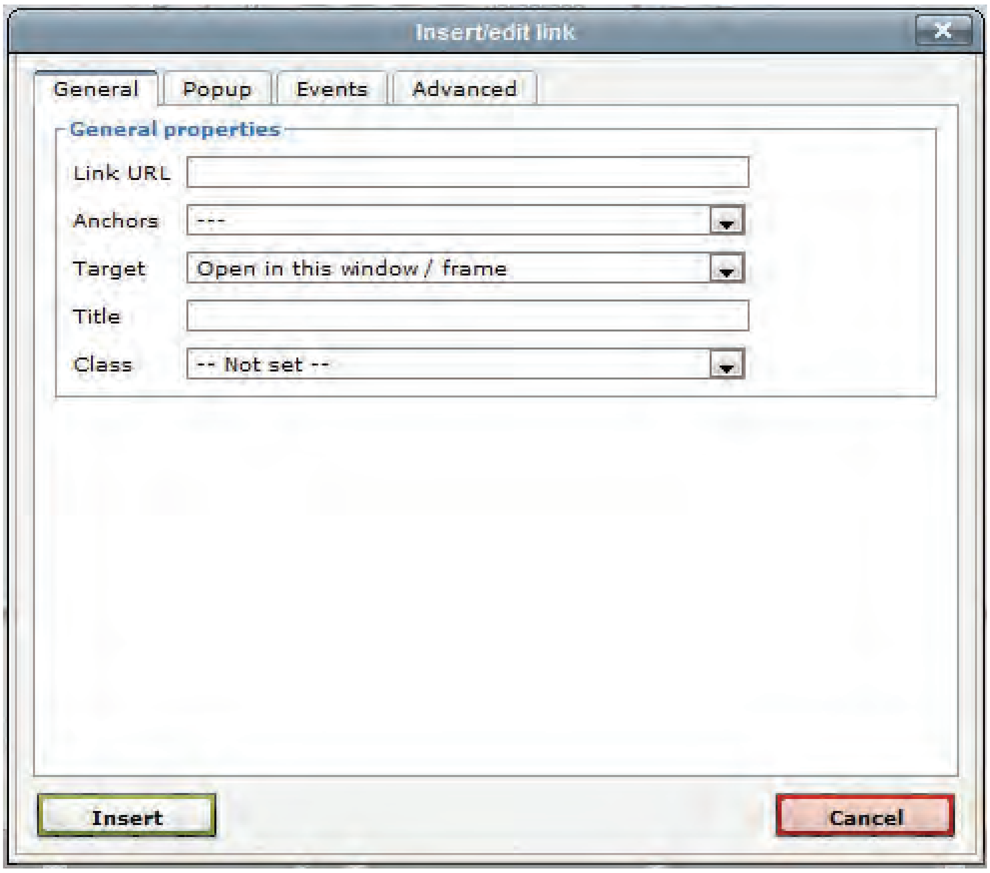
1. Open an E-Newsletter Template.
2. Click within the red dotted box to edit an existing section or add a new E-Newsletter section from the Add Section drop down.



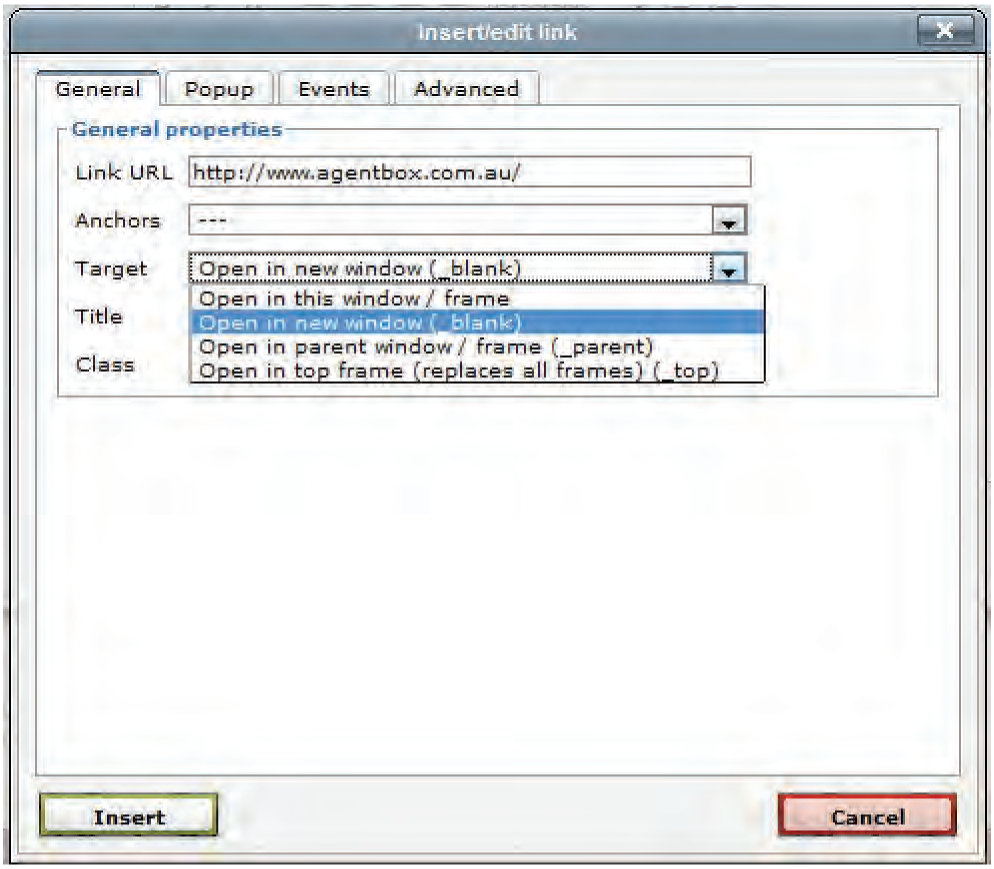
3. Type the text you would like to link, then highlight to select the text



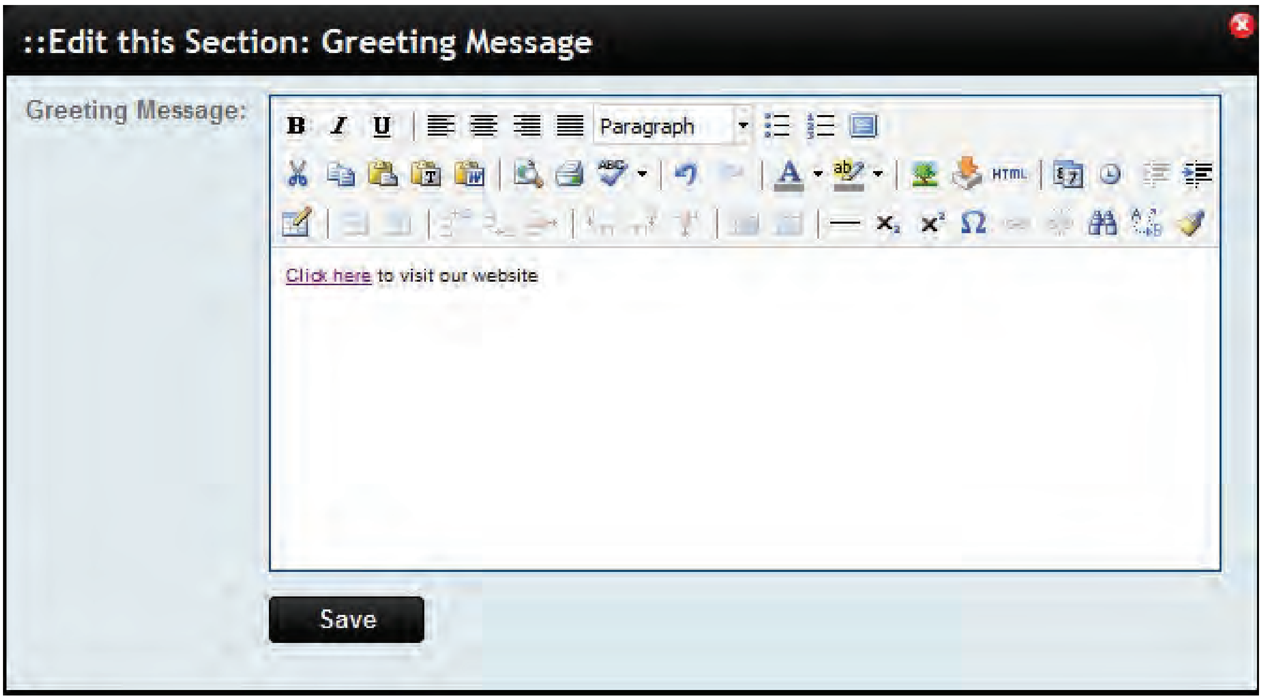
3. Click on the insert link icon 



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

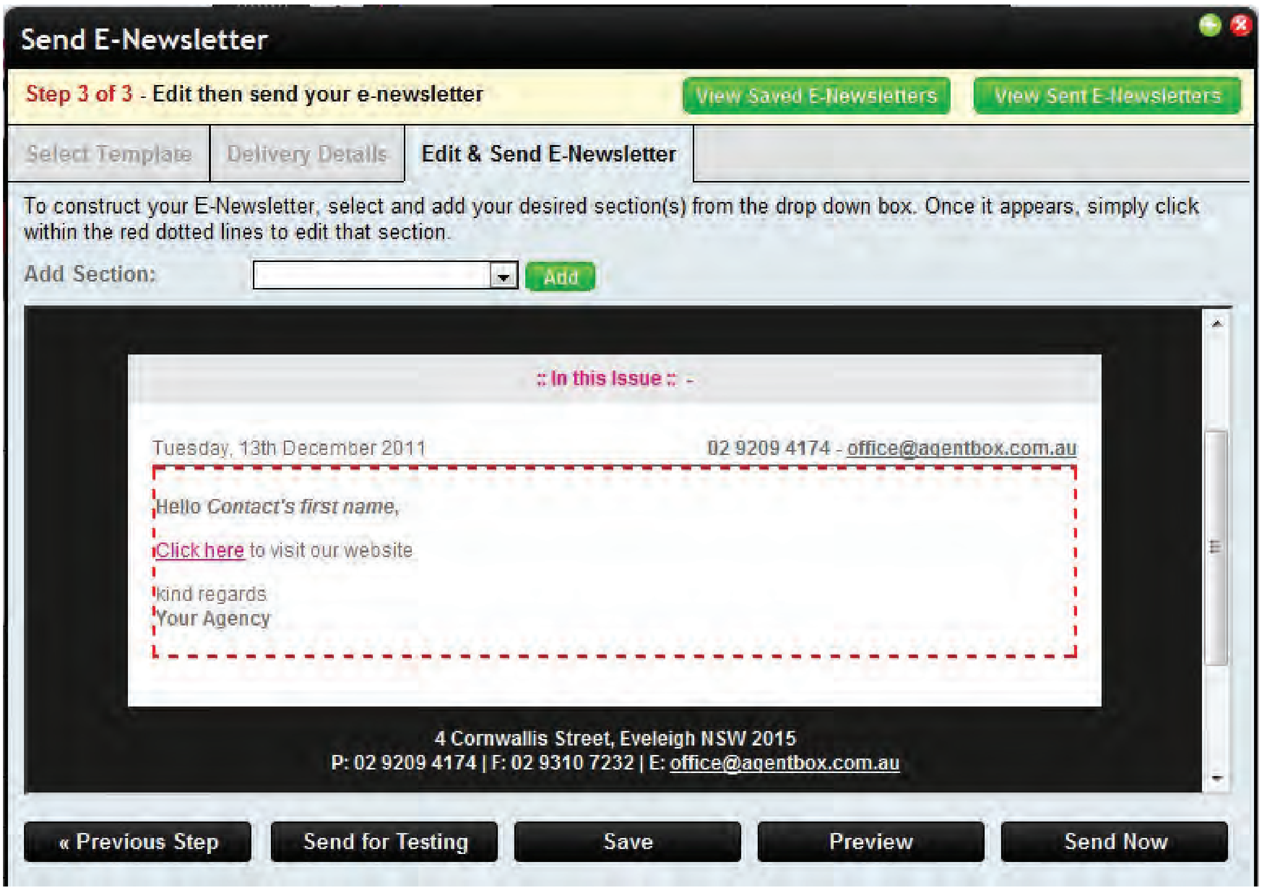


5. The text will now be linked. Click Save



6. You can test this link by clicking the Preview button  before sending.

** Note: please only preview if you have selected 'Open in New Window' as the target in step 4.*



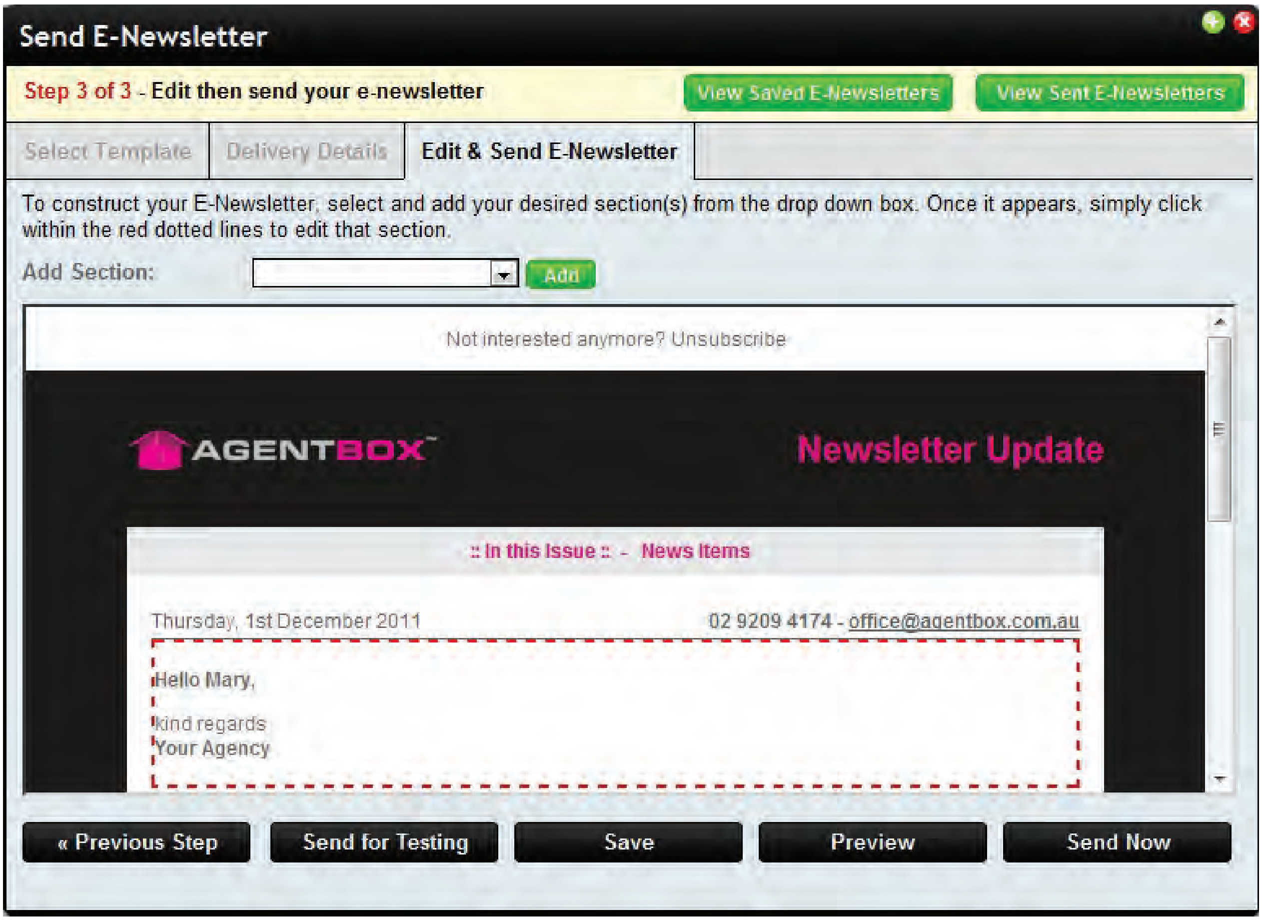
7. You can now send the E-Newsletter by selecting Send Now.

Attach file to E-Newsletter

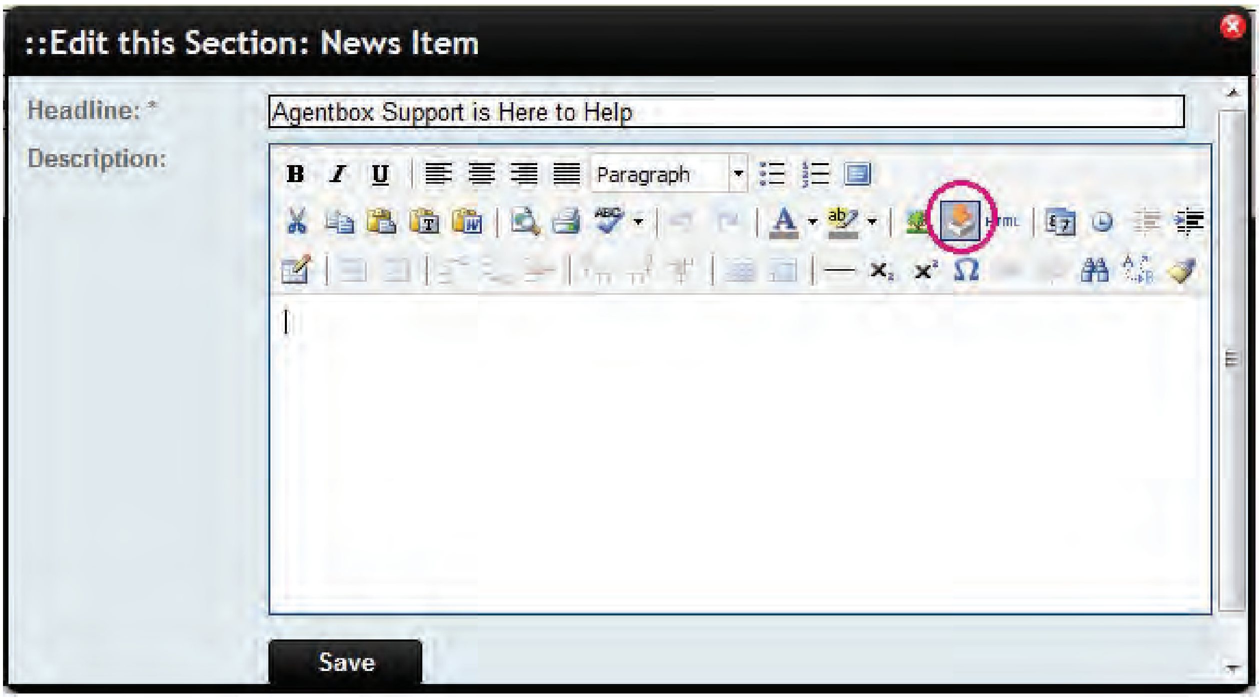
How do I attach a file to an E-Newsletter?

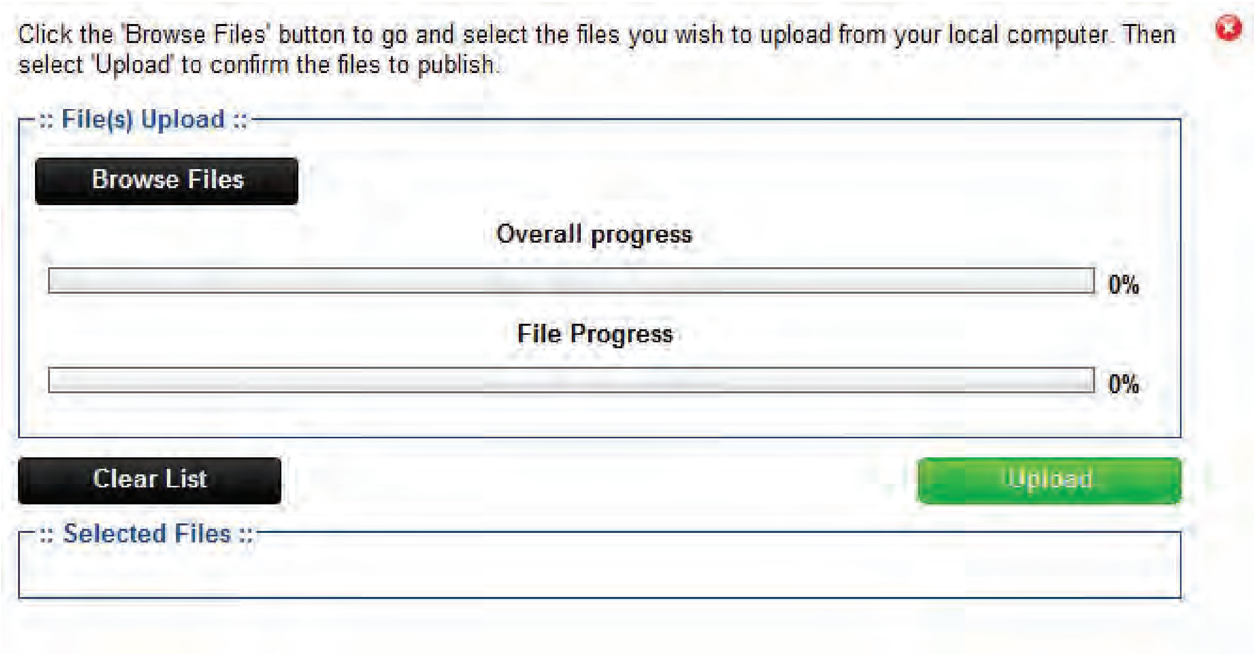
You are not able to attach a file to an E-Newsletter in Agentbox. You can however upload a file and then create a link to the file e.g. Click here to download our Market Update.

1. Open an E-Newsletter Template.
2. Click within the red dotted box to edit an existing section or add a new E-Newsletter section from the Add Section drop down.

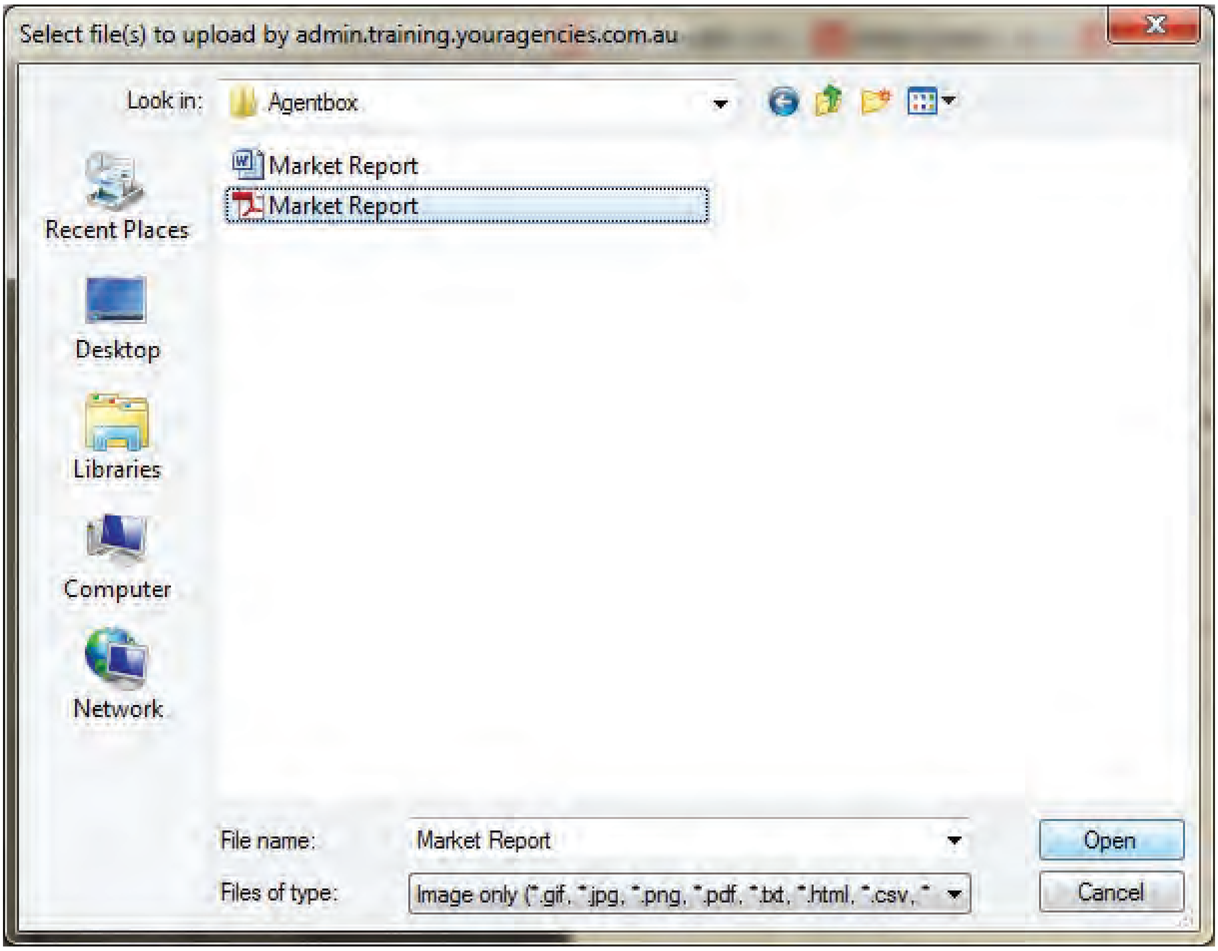


3. Click on the Custom Upload icon

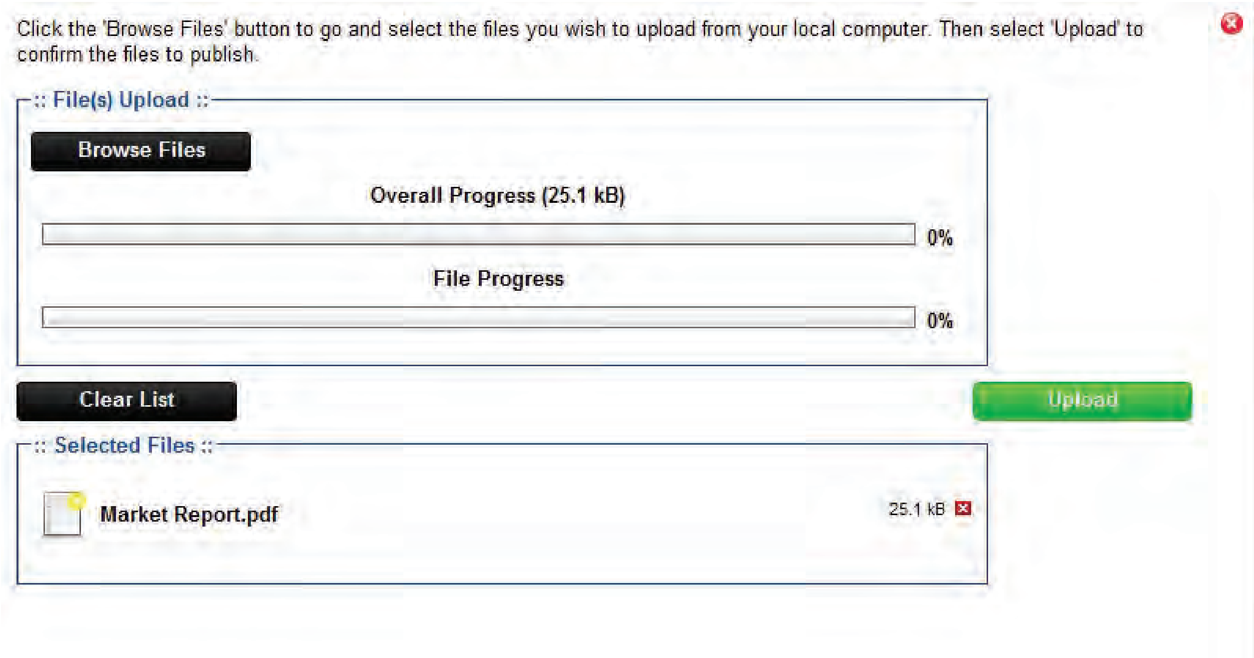




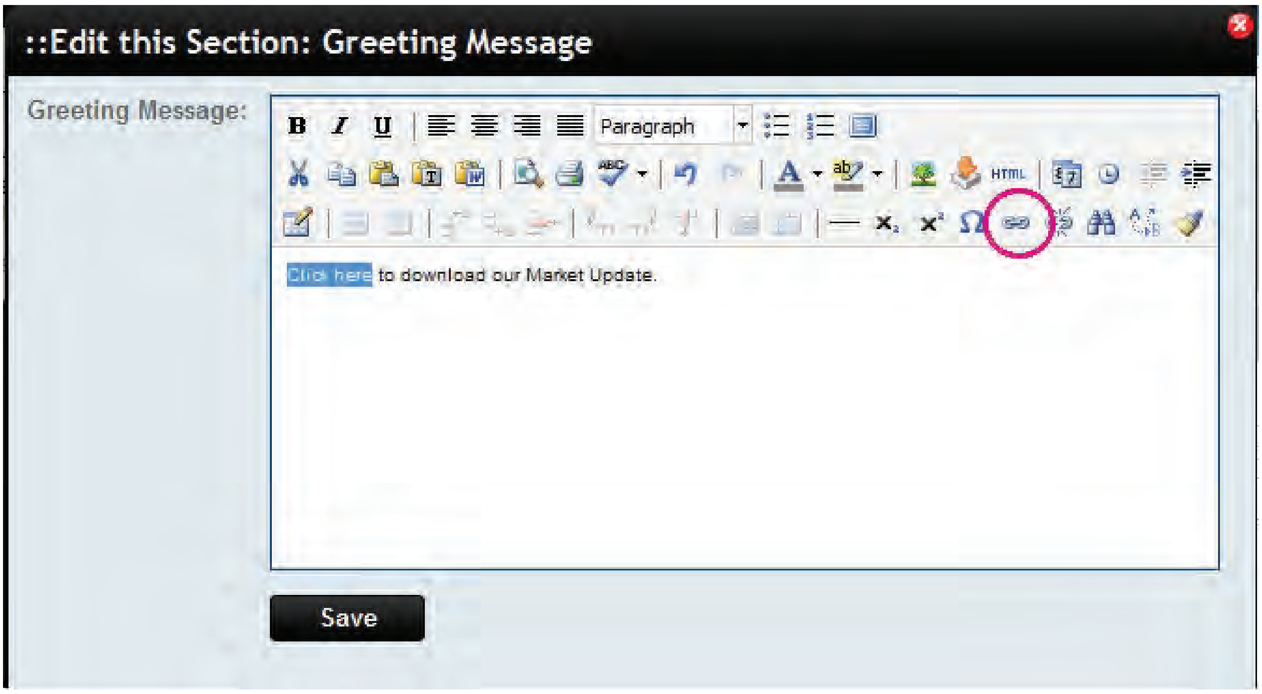
4. Select Browse and select the image you want to upload and click Open.



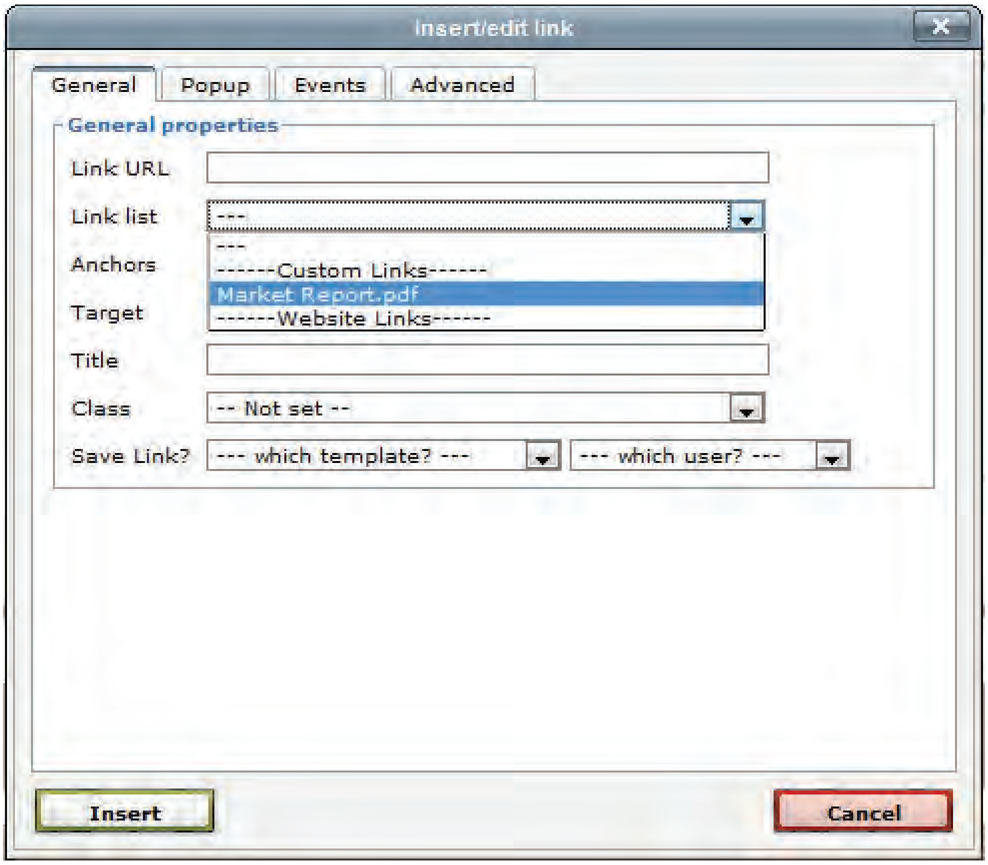
5. Click Upload



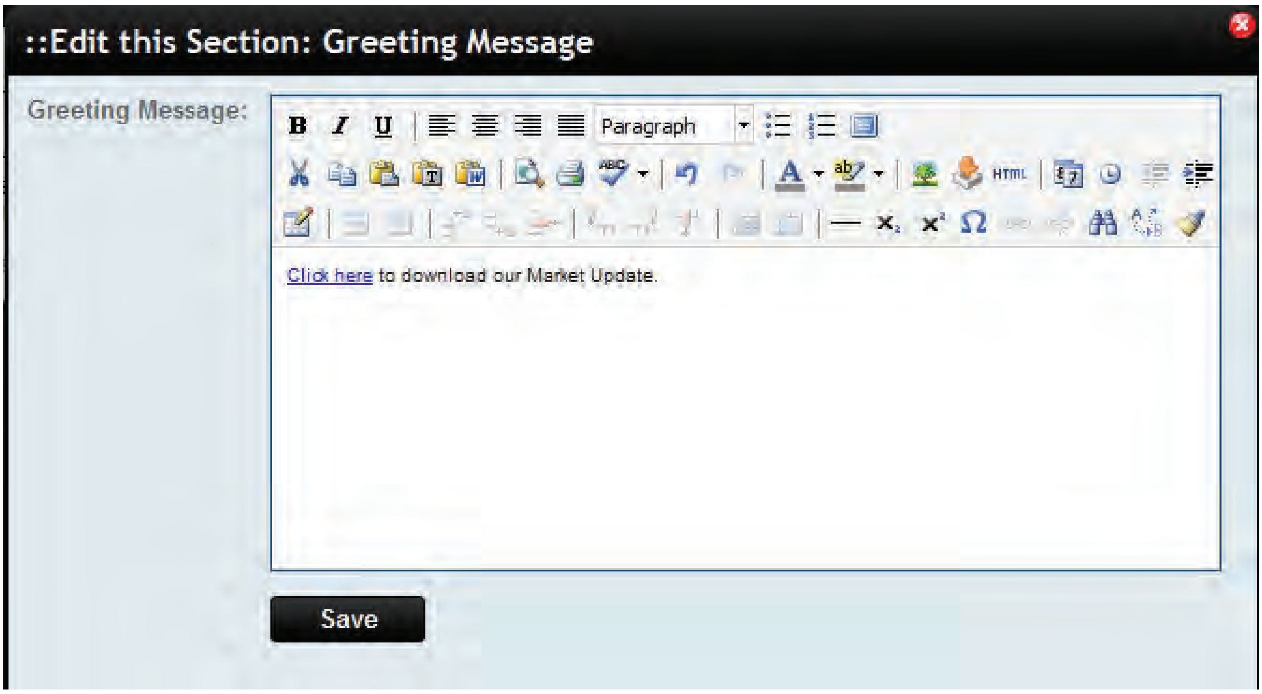
6. Type the text you would like to link, then highlight to select the text



7. Click on the insert link icon and select the file from the Link List Drop Down and and select the target we recommend 'Open in New Window'



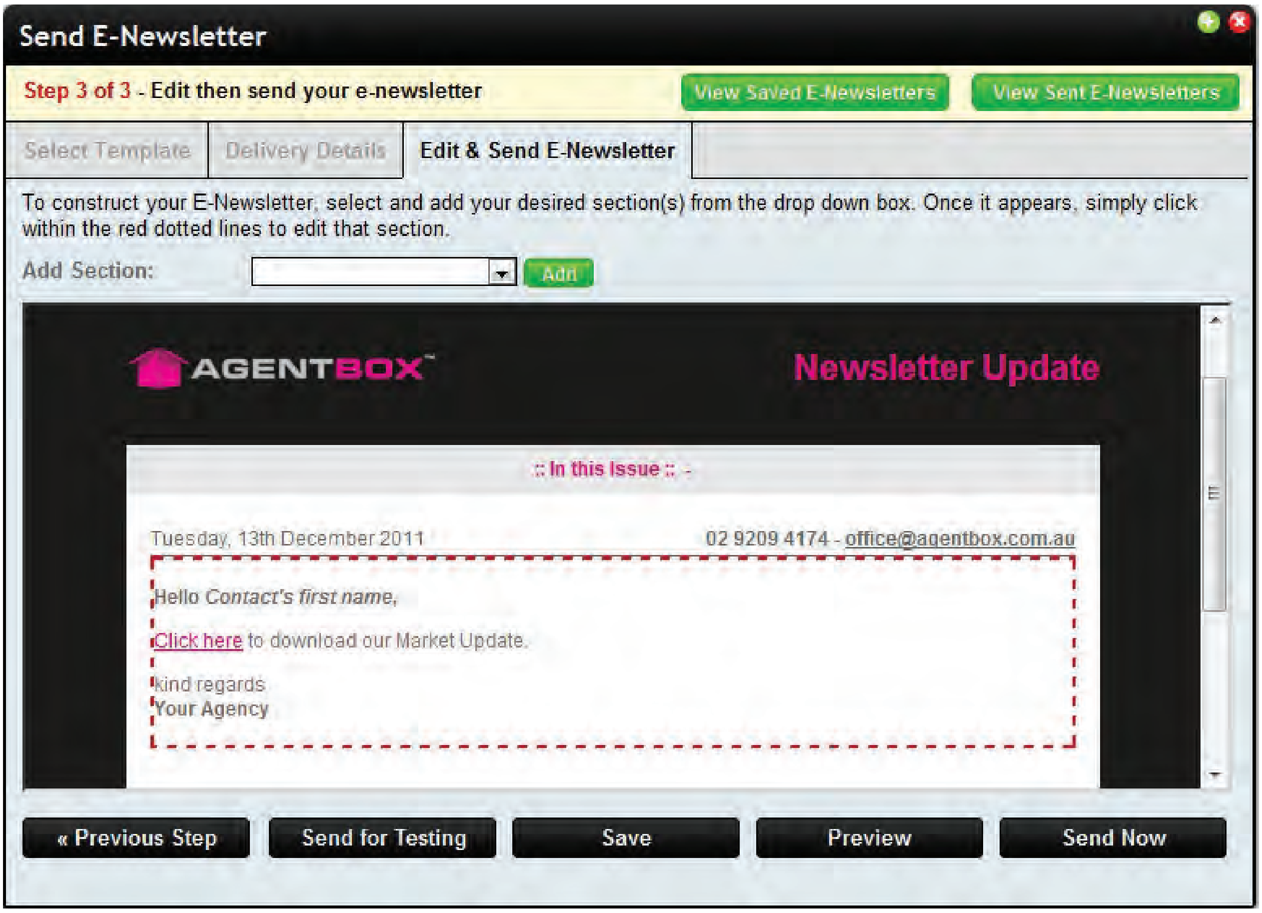
8. Click insert



9. Click Save

You can test this link by clicking the Preview button  before sending.

** Note: please only preview if you have selected 'Open in New Window' as the target in step 7.*



10. You can now send the E-Newsletter by selecting Send Now.

Changing a property Status

Changing a property status

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

Available: Property advertised on your website and portals as current/available
Under Contract: Property advertised on your website and portals as 'under contract'
Exchanged - Conditional: Property advertised on your website and portals as current/available
Exchanged - Unconditional: Property advertised on your website and portals as SOLD [Sold Date = Contract Date]
Settled: Property remains advertised on your website and portals as SOLD [Sold Date = Contract Date]

Detailed Property Status Information

Status	Sub Status	For Sale/ For Lease	Meaning	

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

Settled	**n/a**	For Sale Only	The sale has settled	disp pag 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"

4. A temporary password will be emailed to your email address

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

5. Once you have successfully logged in follow the steps under Change Password to help change your password.

Can't View Agentbox or Website

I can't view the log in page or my website but I can view all other websites.

Please contact Agentbox Support with this issue on 9209 4174 or support@agentbox.com.au ASAP

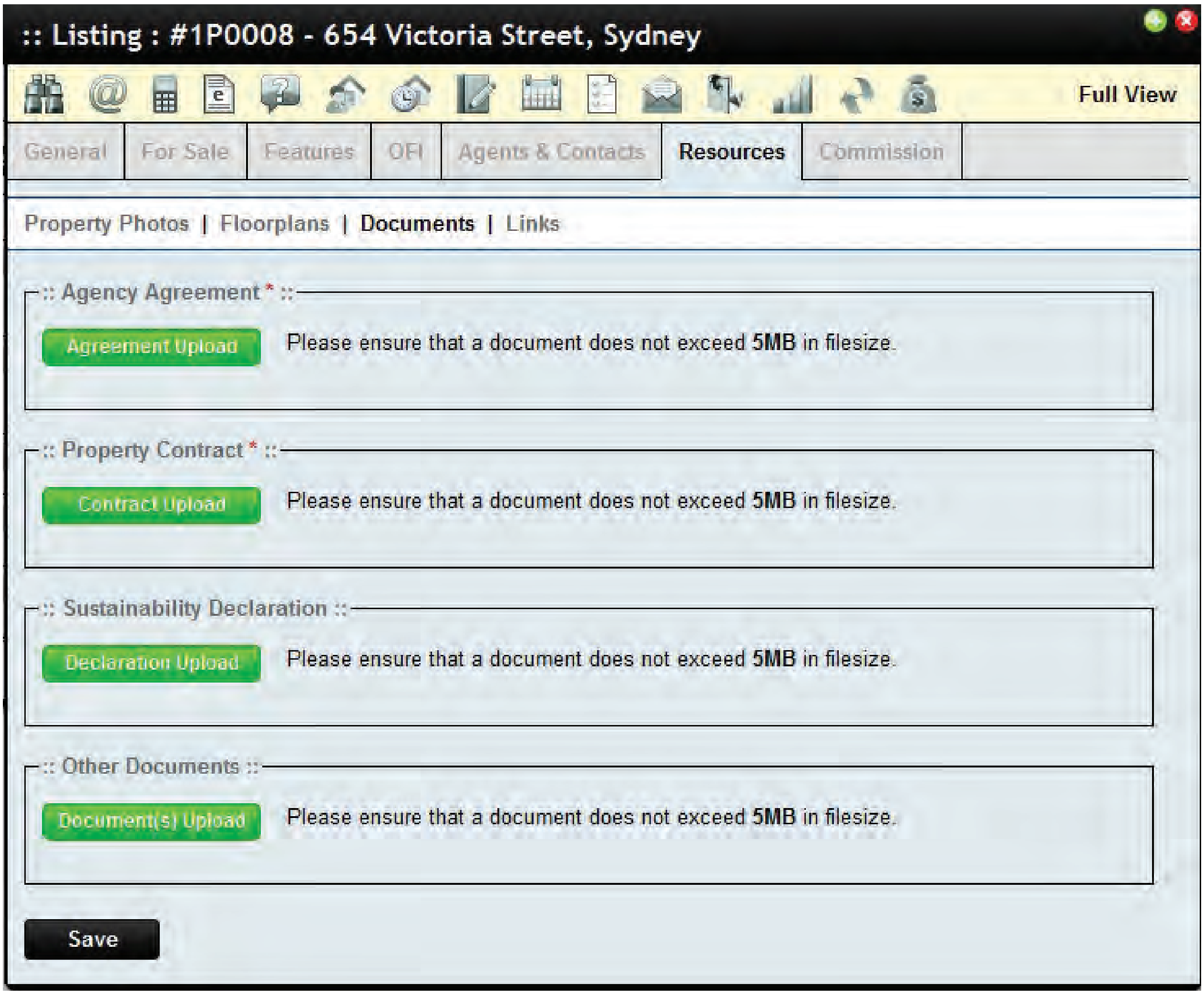
Can't Make Property Available

Why can't I make a property Available?

1. A property can only be changed to 'Available' if it is Offline.
2. A property can only be changed to 'Available' if the user has the permission to "Publish Listings Live" (please contact your master user)
3. A property cannot be made Available unless the correct documents have been uploaded. This is a safety measure to ensure you are legally protected.

**Note: necessary documents will differ according to state.*

3a. To upload these documents go to the Documents sub tab under the Resources tab in a Property Card.



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.

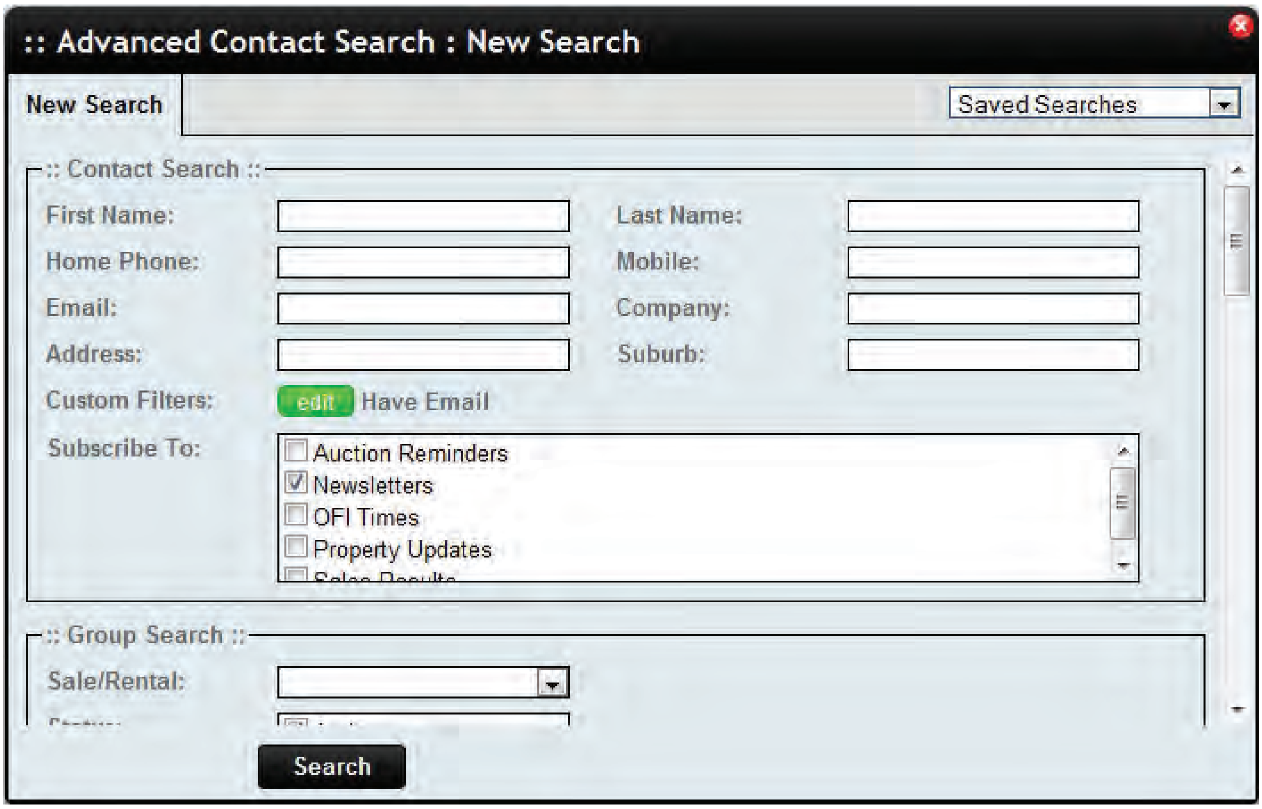
Contact CSV Download

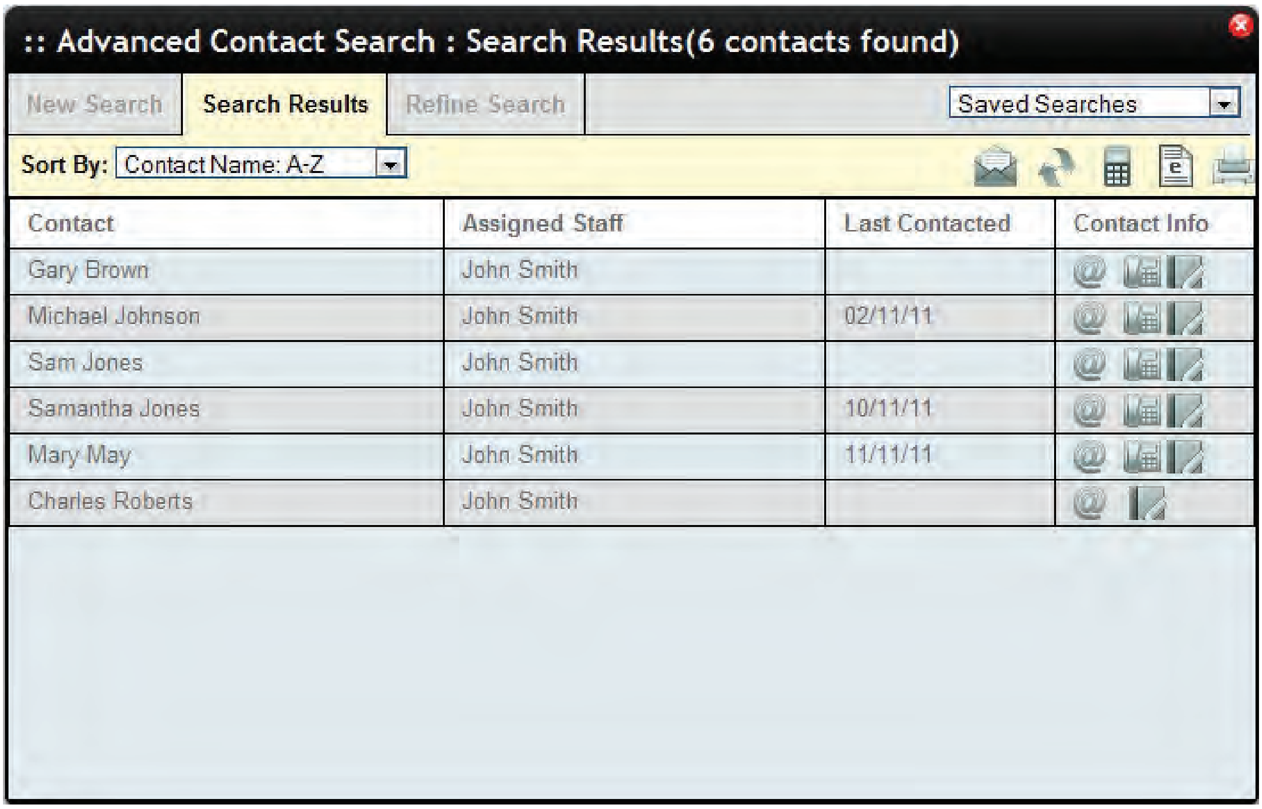
How do I download a CSV file of my Contacts?

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.





Contact	Assigned Staff	Last Contacted	Contact Info
Gary Brown	John Smith		
Michael Johnson	John Smith	02/11/11	
Sam Jones	John Smith		
Samantha Jones	John Smith	10/11/11	
Mary May	John Smith	11/11/11	
Charles Roberts	John Smith		

4. Hit the Download CSV action icon

5. Select to download either a Letter head/Label CSV or a Standard Contact CSV

The Letter head/Label CSV contains the contacts salutation and their letter head in another column.
**Note: The Letter head by default will Address the Custom Letter head entered (if one exists), else Title, First Name, Last Name, Company Name and postal address (if one exists), else Title, First Name, Last Name, Company Name and residential address.*

	A	B	C
1	Salutation	Letter Head	
2	Miss Mary May	Miss Mary May 1 Miles Road Camperdown NSW 2050	
3	Mr Michael Johnson	Mr Michael Jones PO Box 456 Sydney NSW 2000	
4	Mr Sam Jones	Mr Sam Jones Sj Photography 72 Monash Road Sydney NSW 2000	
5	Sammy	Miss Samantha Jones 7 Smith Street Sydney NSW 2000	

The standard contact CSV contains the contacts Title, First Name, Last Name, Preferred Name, Email, Mobile, Phone, Work Phone, Company, Address, Suburb, State, Postcode, Letter head, Assigned Staff and contact classes.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q
1	Title	First name	Last Name	Preferred Name	Email	Mobile	Phone	Work Phone	Company	Address	Suburb	State	Postcode	Letter Hea	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	Camperdo	NSW	2050	Miss	Jane Smith	Buyer;Vendor;Devel	
3	Mr	Michael	Johnson	Mr Michael Johnson	mick@gmail.	0411 222 333	02 9564 2533			5 Miles Road	Sydney	NSW	2000	Mr	Jane Smith	Buyer;Vendor	
4	Mr	Sam	Jones	Mr Sam Jones	sam@hotma	0452 333 666	02 9854 6596		Sj Photogra	72 Monash Roa	Sydney	NSW	2000	Mr Sam	Jane Smith	Buyer;Supplier;Hot B	
5	Miss	Samantha	Jones	Sammy	samantha@h	0425 135 698	02 9856 4523			7 Smith Street	Sydney	NSW	2000	Miss	Jane Smith	Buyer;Vendor;Hot Bu	
6	Mr	Thomas	Train	Mr Thomas Train	tt@hotmail.c	0452 333 653			Signboards	52 Elizabeth Str	Surry Hills	NSW	2010	Mr	Jane Smith	Vendor;Owner Occu	
7	Mr	Gary	Brown	Mr Gary Brown	gary.brown@	0456 231 528				17 Tranmere St	Gosford	NSW	2250	Mr Gary	Jane Smith	Buyer;Vendor;Purch	

6. Click to download and save the CSV file.

**Note: Each CSV file has a limit of 1000 contacts (this may differ depending on your office set up). If a greater list is required please contact Agentbox Support on 02 9209 4174 or support@agentbox.com.au.*

Set Up SMS Tool

How do I set up the SMS tool and how do I allocate credits to staff?

Set-Up

1. Contact Agentbox Support on 02 9209 4174 or support@agentbox.com.au with your SMS Setup

request.

Allocation

1. Once the SMS feature has been successfully setup in your system Support will contact you to guide 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

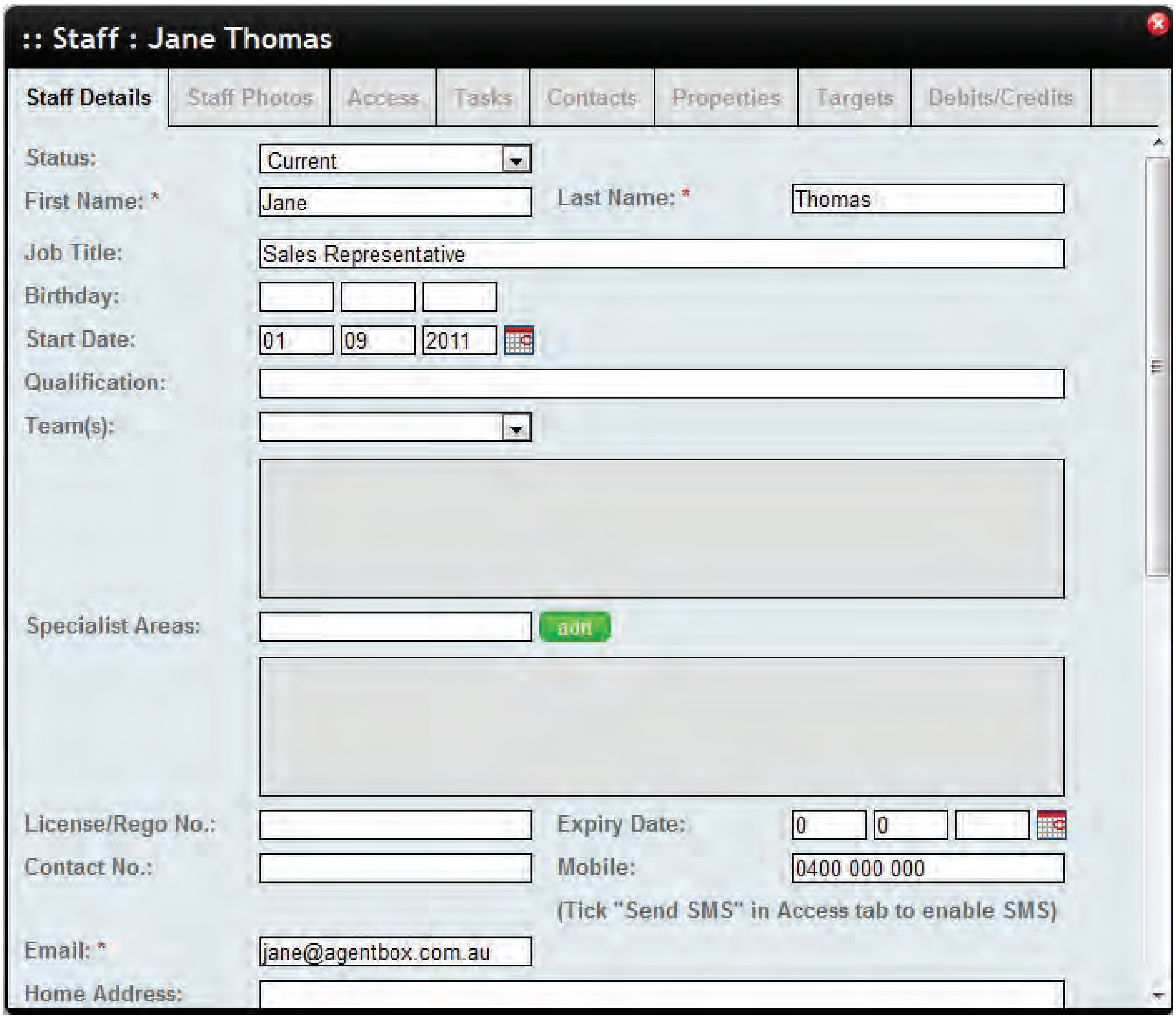
Distribute SMS Access

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.

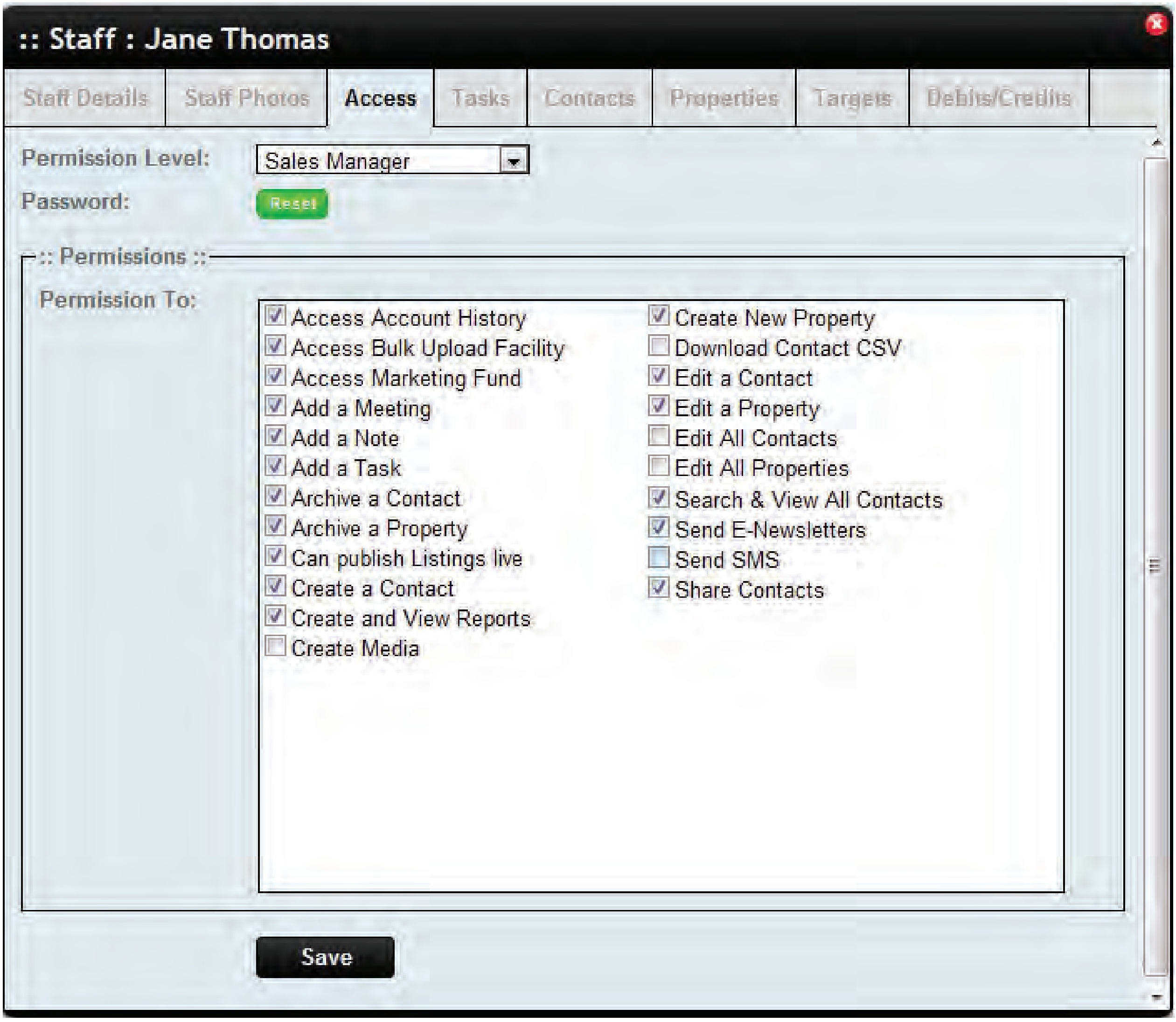
2. Enter a mobile number on the General tab



3. Click Save

4. Go to the Access tab

5. Tick the SMS Access Permission check box



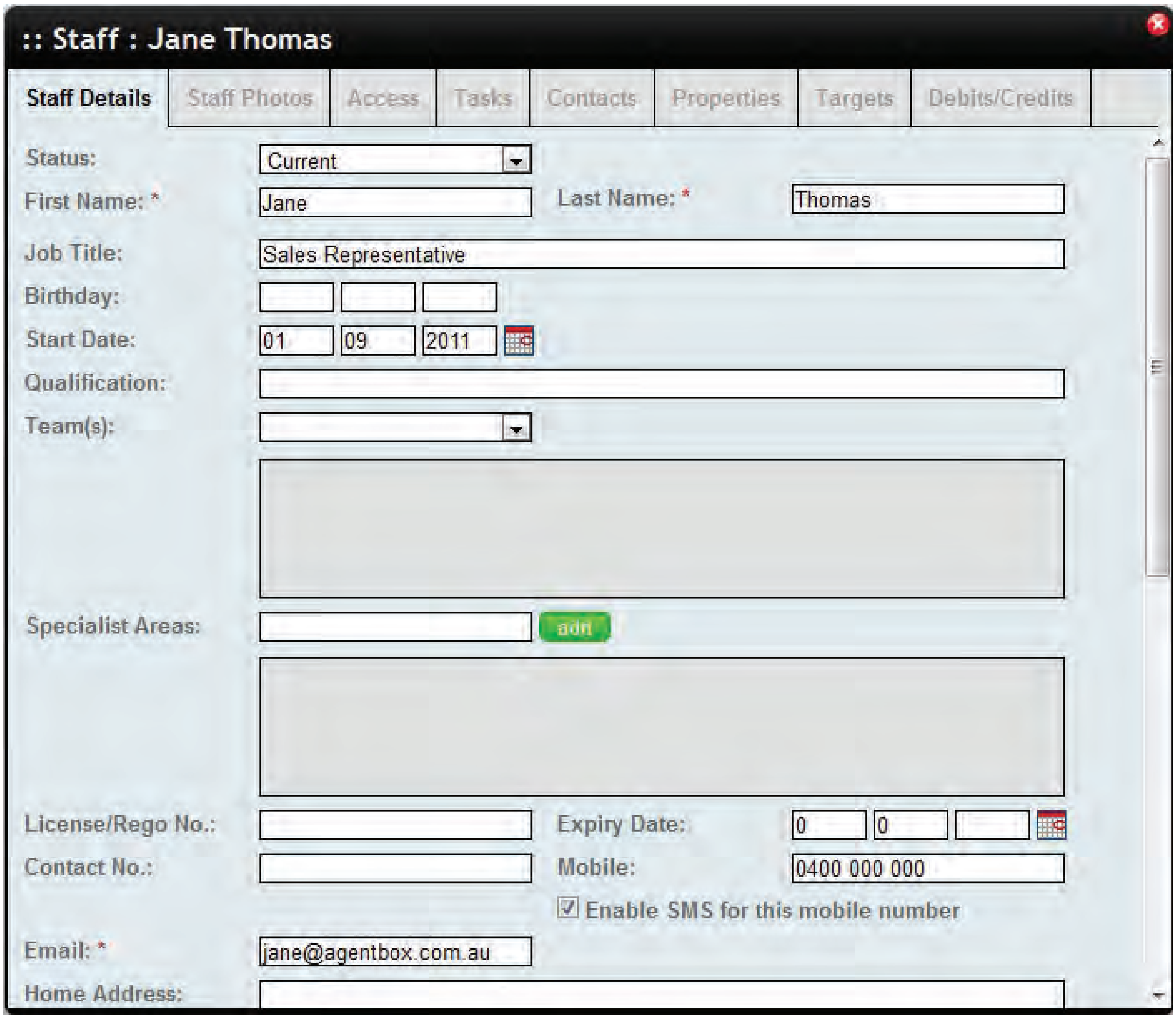
6. A pop-up will appear and an SMS will be sent to the mobile number entered with a code

7. Enter the code in the pop-up

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.



11. Click Save

12. The staff member now has access to send SMS through Agent box.

Cannot Find Photo

I cannot find my photo file on my computer.

1. Agentbox only supports JPEG files with the extension .jpg
2. Please ensure your photos are saved in this format

Issues Uploading Photos

Why can't I upload photos and/or documents?

**Note: Please ensure you follow the following steps in order listed below.*

1. How big are the files you are trying to upload?

    - Photos: max 5MB in file size and the minimum dimensions of that photo are no smaller than 800px wide x 600px high.
    - Documents: max 5MB in file size

2. Is there an error message appearing?

    - Record the error message and contact Agentbox Support on 02 9209 4174 or support@agentbox.com.au.

3. Do you have adobe flash installed on your computer?

    - To check go to Tools
    - Click on Add Ons
    - Click on Plug Ins
    - Search for Shockwave Flash
    - If Shockwave Flash is not visible, please go to http://get.adobe.com/flashplayer/ to download Adobe Flash Player. This program is required for features such as image uploads.

4. Where is the file located?

    - If the file is located on an external server this may cause issues.
    - Please save the photo onto the desktop to test if this is the cause.

5. Is this happening to anyone else in your office? Are you able to upload the same photos from another computer in your office?

    - YES – This may be due to a slow Upload Speed
      To check, please follow the instructions below:
        1. Go to www.speedtest.net and press Begin Test.
        2. Once the test is completed you will be shown your average Download and Upload

Speed.
3. Agentbox recommends a minimum Upload speed of 1mb/s.

- NO – Please contact your IT support to investigate why this is only affecting your computer.

**Note: You may experience an issue during an upload. If this occurs simply click on Refresh Here which will take you back to the Property Resources tab.*

6. If you still cannot upload photos please contact Agentbox Support on 02 9209 4174 or support@agentbox.com.au.
**Note: Ensure to explain all the steps you have followed to help Agentbox Support staff resolve your issue quickly.*

Mobile Access

How do I access Agentbox on my iPhone, iPad or Smart phone?

This is accessed via Agentbox Mobi Admin (beta version).
**Note: As this is a beta release, we encourage you to provide feedback. Please direct any feedback and enquiries to mobisupport@agentbox.com.au so that it can be collated and prioritised.*

1. Go to the URL provided e.g. http://adminmobi.youragency.com.au
2. Use your normal user name and password to login.

3. If you do not see the login screen, the Mobi Admin may not have been set up for your office. Please contact support@agentbox.com.au to activate this, 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.

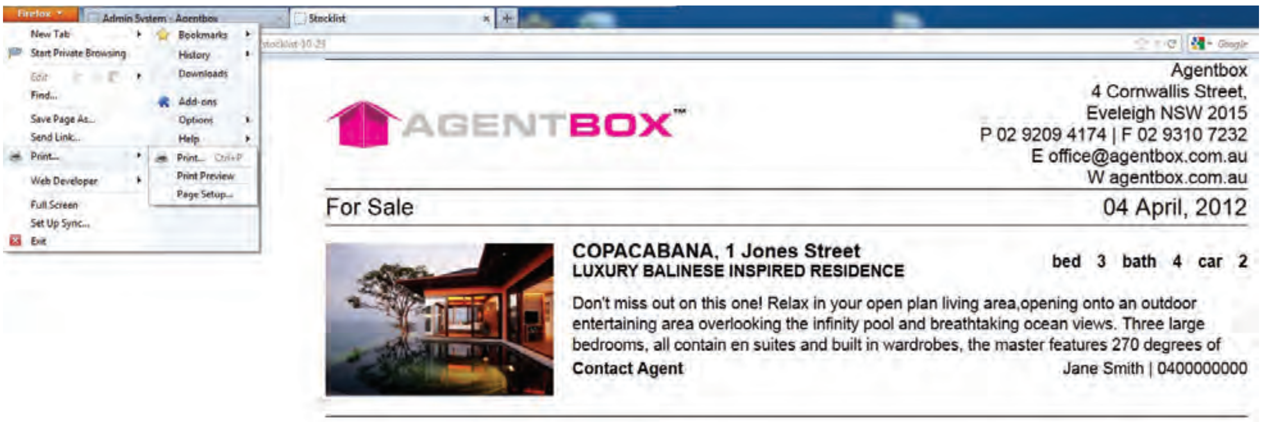
5. We will use the initial data to test the import and if it is ok we will activate the automatic import at our end and confirm by email that your new feed is active.

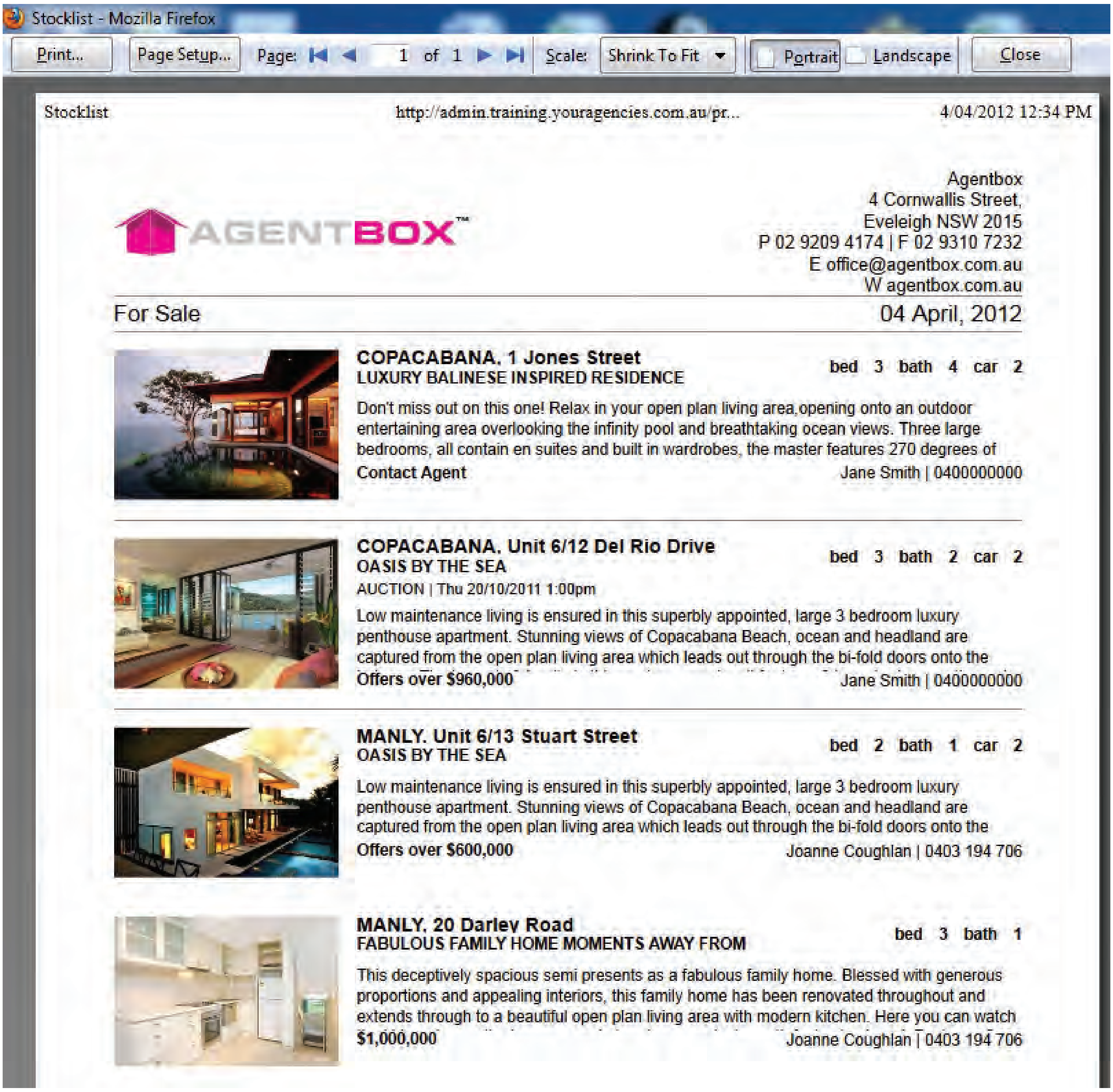
Print Settings

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





Stocklist http://admin.training.youragencies.com.au/pr... 4/04/2012 12:34 PM

AGENTBOX™

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

For Sale 04 April, 2012

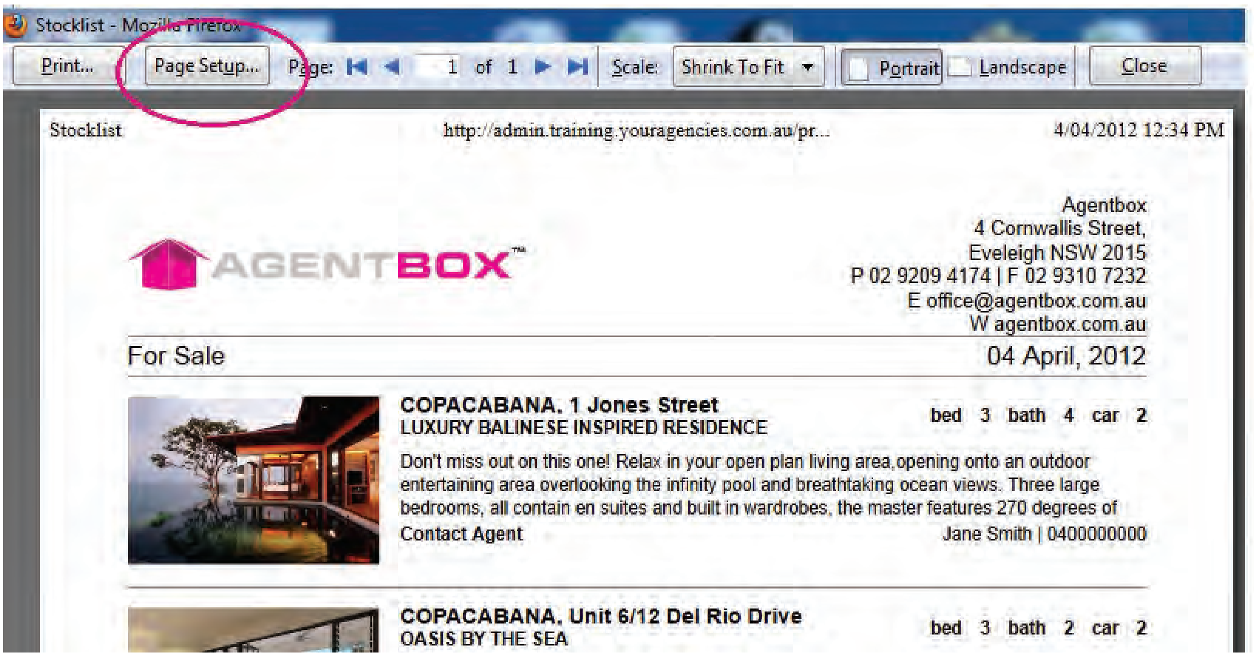
COPACABANA, 1 Jones Street bed 3 bath 4 car 2
LUXURY BALINESE INSPIRED RESIDENCE
Don't miss out on this one! Relax in your open plan living area,opening onto an outdoor entertaining area overlooking the infinity pool and breathtaking ocean views. Three large bedrooms, all contain en suites and built in wardrobes, the master features 270 degrees of
Contact Agent Jane Smith | 0400000000

COPACABANA, Unit 6/12 Del Rio Drive bed 3 bath 2 car 2
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 which leads out through the bi-fold doors onto the
Offers over $960,000 Jane Smith | 0400000000

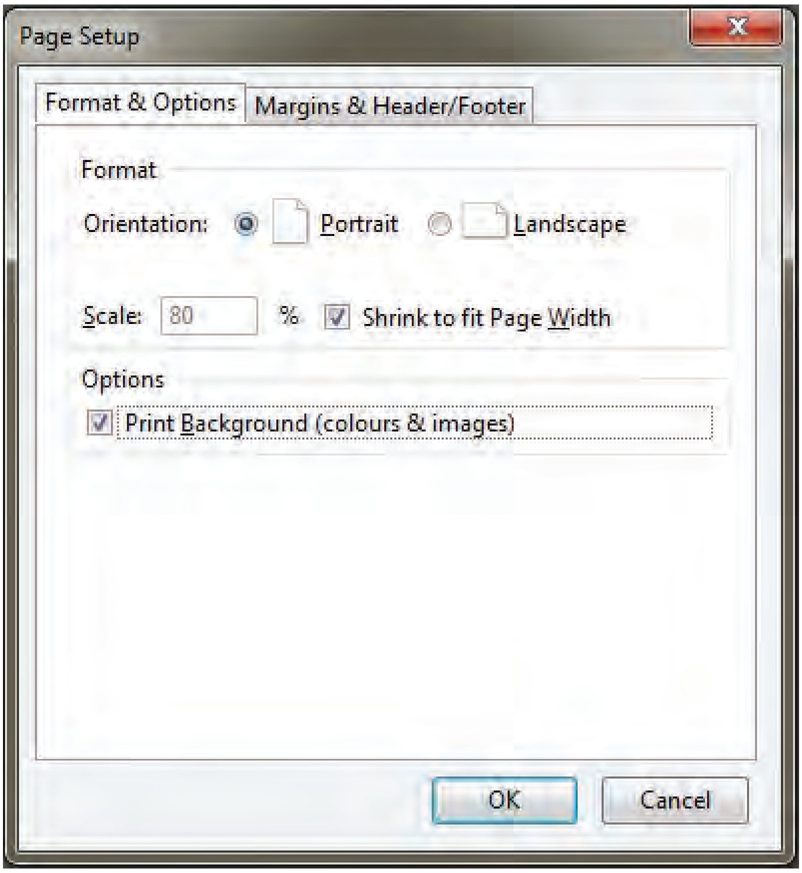
MANLY, Unit 6/13 Stuart Street bed 2 bath 1 car 2
OASIS BY THE SEA
Low maintenance living is ensured in this superbly appointed, large 3 bedroom luxury penthouse apartment. Stunning views of Copacabana Beach, ocean and headland are captured from the open plan living area which leads out through the bi-fold doors onto the
Offers over $600,000 Joanne Coughlan | 0403 194 706

MANLY, 20 Darley Road bed 3 bath 1
FABULOUS FAMILY HOME MOMENTS AWAY FROM
This deceptively spacious semi presents as a fabulous family home. Blessed with generous proportions and appealing interiors, this family home has been renovated throughout and extends through to a beautiful open plan living area with modern kitchen. Here you can watch
$1,000,000 Joanne Coughlan | 0403 194 706

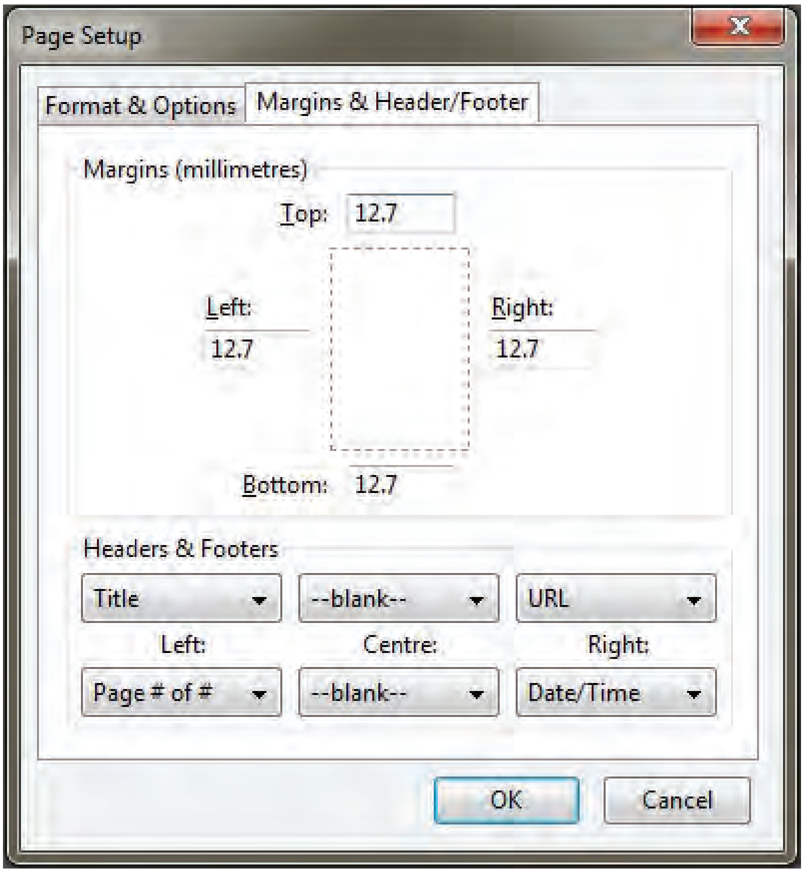
3. Click on Page Setup



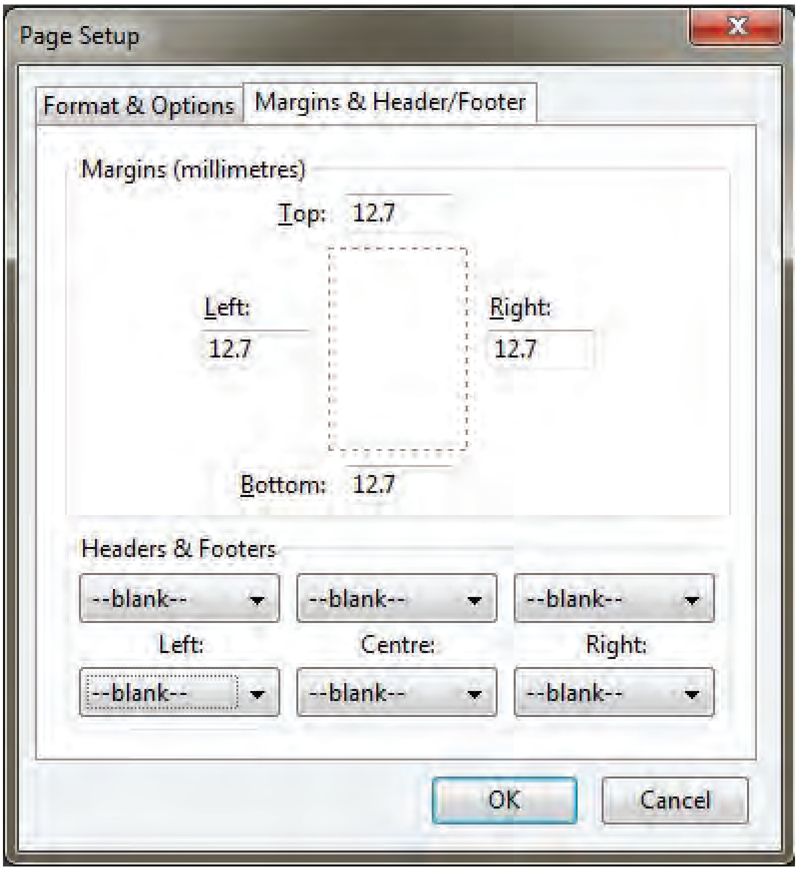
4. Ensure Print Background (colours & images) is ticked.



5. Click on Margins & Header/Footer

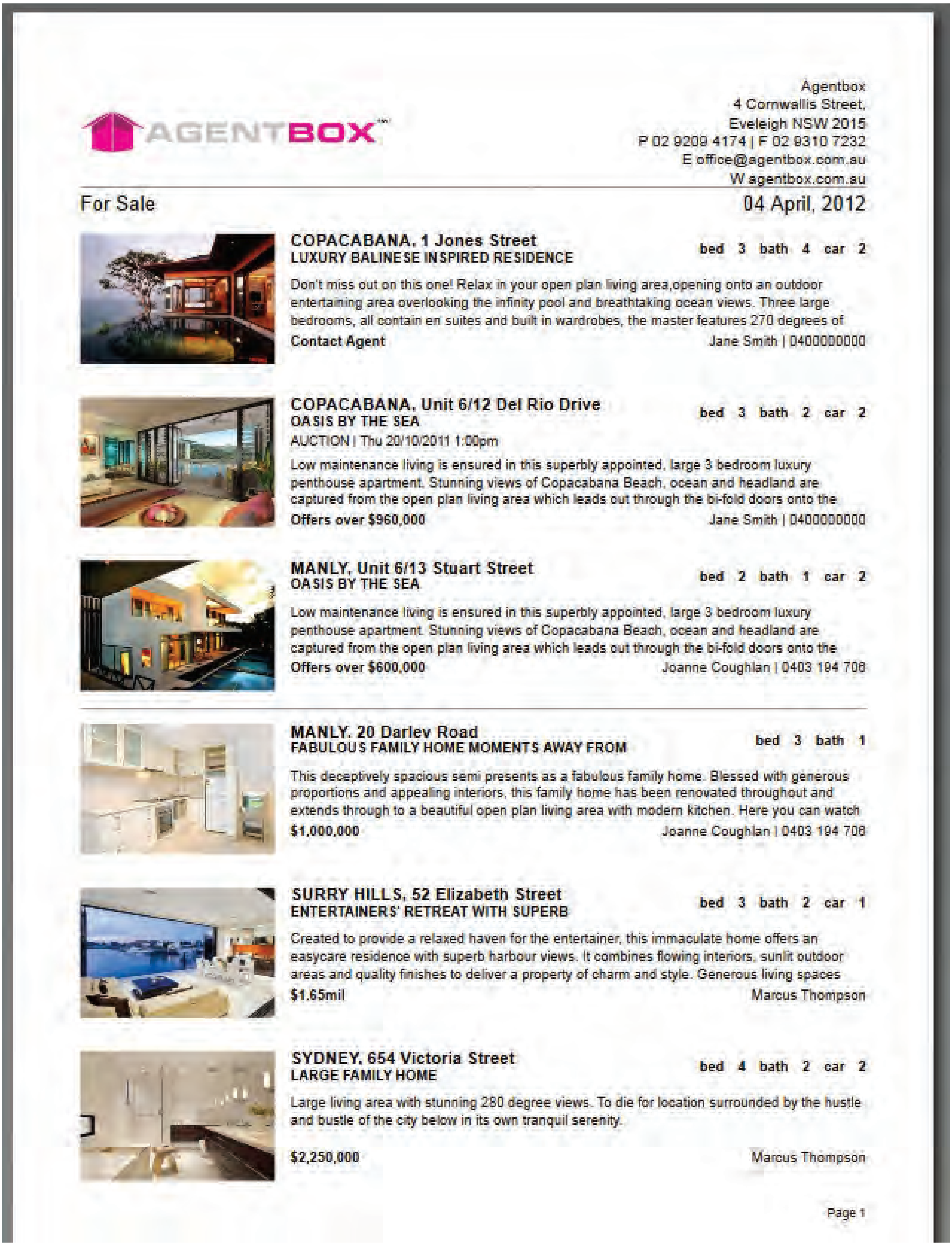


6. Change all other to --blank-- to eliminate all headers, footers and URL details.



7. Click Ok

8. Now if you generate a print preview before printing your html reports e.g. a stock list, or when conducting a mail merge you will notice they fit one per page.



Agentbox
4 Cornwallis Street,
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For Sale

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bed 2 bath 1 car 2

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$1,000,000 Joanne Coughlan | 0403 194 706

SURRY HILLS, 52 Elizabeth Street
ENTERTAINERS' RETREAT WITH SUPERB
bed 3 bath 2 car 1

Created to provide a relaxed haven for the entertainer, this immaculate home offers an easycare residence with superb harbour views. It combines flowing interiors, sunlit outdoor areas and quality finishes to deliver a property of charm and style. Generous living spaces

$1.65mil Marcus Thompson

SYDNEY, 654 Victoria Street
LARGE FAMILY HOME
bed 4 bath 2 car 2

Large living area with stunning 280 degree views. To die for location surrounded by the hustle and bustle of the city below in its own tranquil serenity.

$2,250,000 Marcus Thompson

Page 1