

The logo for EstatesIT, featuring the text "EstatesIT" in white, bold, sans-serif font inside a green, rounded, pill-shaped border with a slight gradient and shadow.

EstatesIT



Basic PCHomes Training

By David Weller

“Knowledge is Power!”



How To Add A Negotiator

- Fill in tab 1 “Contact“ on the “Negotiator” screen.
- Tab 2 “Security” the importance of setting up the correct security level & access group.
- Setting up the password for the Negotiator.

NOTES

Preparing A Property For Valuation

- New property will open in “EDIT” mode:
 “GREEN FOR GO & WHITE FOR NO!”
- Fill in the property address. TRY to get a full postcode (PAF Software).
- Is the property for sale or to rent?
- Select the type of property i.e. Flat, House etc...
- Number of bedrooms?
- Note: if you don't win the instruction, update your availability date to the best of your knowledge.

NOTES

Add A Landlord & Vendor

“More contact information = more business”

“Knowledge is Power!”

- Fill in Tab 1 on the **“Landlord”** screen.
Especially the source field e.g. Rightmove – Test & Measure your marketing.
- Usage of notes field (time stamp) and colours (“How Hot”).
- Importance of dates and phone calls (contact reminders).
- Send email(s) to multiple addresses in one go!

NOTES



Convert a vendor to a landlord

In PCHomes landlords & vendors are different person types.

You will need to create a separate record for each.

Step 1 – clone the original record

Step 2 – change the person type as appropriate using field in top left hand corner.

Step 3 – notice the changed code usually (L) or (V) will be added to the new record.

If you do not do this : when you click on the record from a property screen you will be looking at a seemingly random record. It is actually the record at the top of the list but it means that PCHomes cannot find the correct record.

NOTES



Booking A Valuation

- Booking a valuation via the “**Events**” screen.
- Different outputs & email / SMS confirmation of valuations.
- Updating valuations to Outlook and synching to your smart phones.

NOTES

Closing A Valuation

- Add valuation amount to the diary event.
- Add asking price & fees to the property record.
- Produce & send the market appraisal letter.
- Take on the property and commence marketing (EPC and T & C signoff).

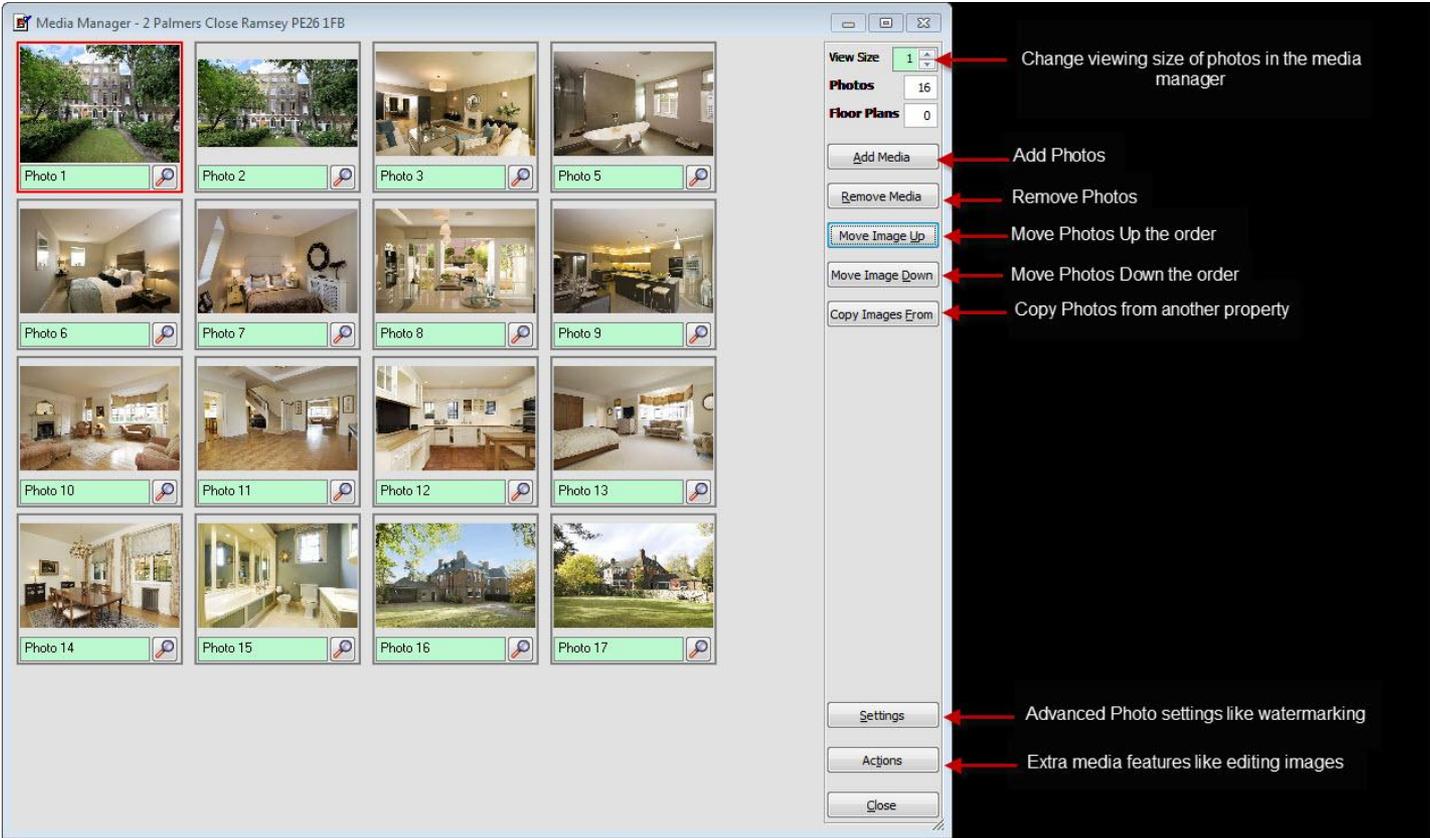
NOTES

Preparing A Property For Marketing

- Fill in the “**Details**” tab (Brief Description).
REMEMBER SPELL CHECK F7
- Use Media Manager to customise & add photos / floor plans.
- Fill in the “**Descriptions**” tab (full description / bullets).
- Uploading your property to your website & Portals.
- Producing window cards and particulars.
- Producing letters & documents.
- Document storage & reproducing documents (“open docs”).
- Adding EPC’s to comply with current legislation.

NOTES

Media Manager



The screenshot shows the Media Manager application window titled "Media Manager - 2 Palmers Close Ramsey PE26 1FB". The main area displays a grid of 17 photos, labeled "Photo 1" through "Photo 17". The first photo is highlighted with a red border. On the right side, there is a control panel with the following elements:

- View Size:** A dropdown menu currently set to "1".
- Photos:** A numeric input field set to "16".
- Floor Plans:** A numeric input field set to "0".
- Add Media:** A button to add new photos.
- Remove Media:** A button to remove photos.
- Move Image Up:** A button to move photos up the order.
- Move Image Down:** A button to move photos down the order.
- Copy Images From:** A button to copy photos from another property.
- Settings:** A button for advanced photo settings like watermarking.
- Actions:** A button for extra media features like editing images.
- Close:** A button to close the application.

Red arrows point from the text labels on the right to the corresponding controls in the interface.

Adding An EPC

- **Add EPC's to ALL properties advertised after 6th April 2012.**
- The EPC can be added to your website & particulars:

For Particulars - add page 1 of the EPC document to property details using Merge PDF.

View Video: <http://videos.estatesit.com/player/how-to-add-epc-to-particulars-in-pchomes>

For Website - add the EPC document to website using links on tab 9.

View Video: <http://videos.estatesit.com/player/how-to-add-epc-documents-to-websites>

NOTES



Applicant Matching

- Create a new Applicant.
- Matching in PCHomes & different matching options.
- Create email lists to applicants via a match.
- Revisit the property screen and match to list of applicants.
- Booking viewings via matched applicants.
- Pro active call logging.

NOTES



Applicant Management

- Colour coding applicants via “How Hot” options (prioritise your calls).
- Contact management screens (“Contacts today” & “Buzz” screen).
- Creating contact diary events via (phone/email/mobile).

NOTES



Booking A Viewing

- Booking a viewing via matched applicants.
- Different outputs & email / SMS confirmation of viewings.
- Updating viewings to Outlook and syncing to your smart phone.
- Creating multi viewings (“Road Trip”).
- “Buzz screen” and “Valuation 2 Offer.”

NOTES

Making & Accepting Sales Offers

- Make offers in the “Events” screen of the property.
- Offers appearing on the “Buzz” screen & Diary.
- Accepting an Offer ... “PCHomes Pays Off.”
- Create Solicitors (Vendors & Purchasers).
- Create letters such as memo of sale etc...

NOTES

Making & Accepting Lettings Offers

- Make offers in the “Events” screen of the property.
- Offers appearing on the “Buzz” screen & Diary.
- Update Notes in the diary offer event e.g. waiting on references etc...
- If references are NOT accepted then update notes and click done in diary event.
- If references pass then update notes, add refs to open docs and accept offer.
- On Finance tab 7 fill in (Deposits/Fees).
- On Detail tab 1 fill in (Tenure/Tenancy start & end dates).
- Run out appropriate letters e.g. receipts, Tenant Initial cost summary & TA etc...

NOTES



6 to 12 months later!

- Check buzz screen for “Section 21.”
- Producing Section 21 notice letter.
- Renew or End Tenancy?
- Check “Rentals Coming Soon” 31 days less availability date.

NOTES



The Diary

- Different views of the Diary (daily/people/list).
- What are “My Event Choices”...
- Add events if they are not associated to a property.
- Create diary events lists.

NOTES



Email Reader

- Reading Email leads e.g. Rightmove into PCHomes.
- Add an Applicant.
- Mailshot & Followup (Colour coding revisited).
- Adding some information to an Applicant.
- Booking viewings / appointments.

NOTES



Sidebar Features

- All Applicants function.
- Rentals coming soon (in next 31 days).
- SSTC/Under Offer.
- Property Events (Filtering the diary).
- Converting word docs to PDF.
- Mail shot function.

NOTES



Fun with Finding

- Different ways to find applicants?
- Selection of different find Windows.
- Wild cards in PCHomes.
- Current valuations and advance filtering.
- Property touting via a list of valuation properties.

NOTES

Online Backup

There are 2 different backup processes which can be run from PCHomes.

To gain access to both options click on “Data” on the top menu (If you do not see this option then call customer support desk 0208 859 1700 opt 2) and then select one of the following:

Online Backup (Quick) – Run this daily

This option will backup all your data excluding Photos/Docs.

Online Backup (Full) – Once a week

This option will backup ALL of your data including Photos/Docs.

NOTES

Keyboard Reference Card for PCHomes

- F1** - Access the help menu and link to training videos.
- F3** - Use to clone a record.
- F5** - Use to create a new record.
- F7** - Use to spell Check description field in edit mode.
- Ctrl + A** - Highlight all text in a field.
- Ctrl + C** - Copy selected text in a field.
- Ctrl + V** - Paste selected text.
- Ctrl + X** - Cut selected text.
- Ctrl + T** - Insert date and timestamp and users name in a field.
- Tab** - Move to the next field.
- Home** - Moves you to the beginning of the field.

Other Courses Worth Considering

- Management Courses (Feb/March):
 - Book keeping accounts (e.g. Rent reconciliation etc...).
 - Collection of rents/fees/deposits/landlord payments.
 - Gas Checks and management visits.
 - Easy 5 steps to a happy landlord.
- Advanced PCHomes:
 - Creation of document templates.
 - Negotiator Statistics reporting.
 - Pipeline reporting.
 - CMS amending & adding website content via PCHomes.
 - And much more...