EstatesIT.Software Training

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Add a new valuation via flyout menu

From the flyout menu on the right hand side click on Add Valuation £ Icon.

Setting up a valuation

1. Add contact information into the top part of the screen. If they already exist you can select them from the find option. The red tabbed sections must be added.

2. Add property information into the bottom part of the screen. If they already exist you can select them from the find option.

3. If the valuation is a new property the address can be added via the postcode lookup. Make sure to change the Price Type field from Rent/Sale.

4. Click on the diary tab to book the valuation in the diary select the timeslot then click on Save/Save & Review.
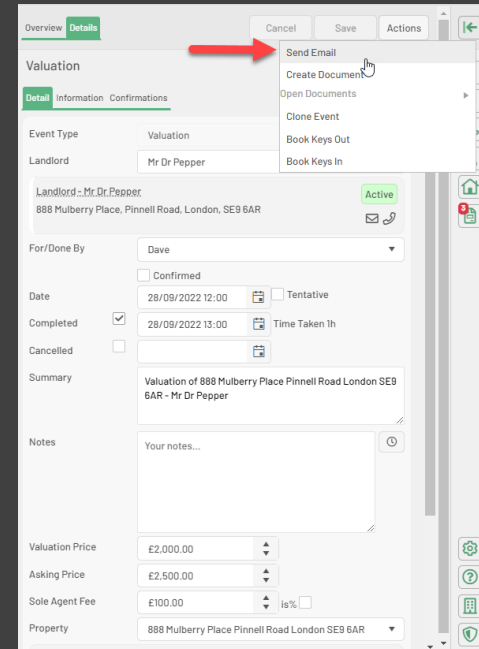
Save = You can save this valuation and deal with it later on.

Save & Review = Will open the valuation event If you need to add notes or update the record.

Send the valuation confirmation Email

1. Click on Actions then Send Email.

2. Select the Valuation Appointment confirmation output.

3. You can click on Preview button and If you are happy with the Email click on Send.

Complete the valuation event

1. From the Buzz menu option you should see your Valuation event in the follow ups.

2. Select your Valuation to open the event.

3. Add the Valuation Price & Asking Price if they are different.

4. Add any notes.

5. Add your Sole Agent fee.

6. Tick on the completed box to complete your valuation.
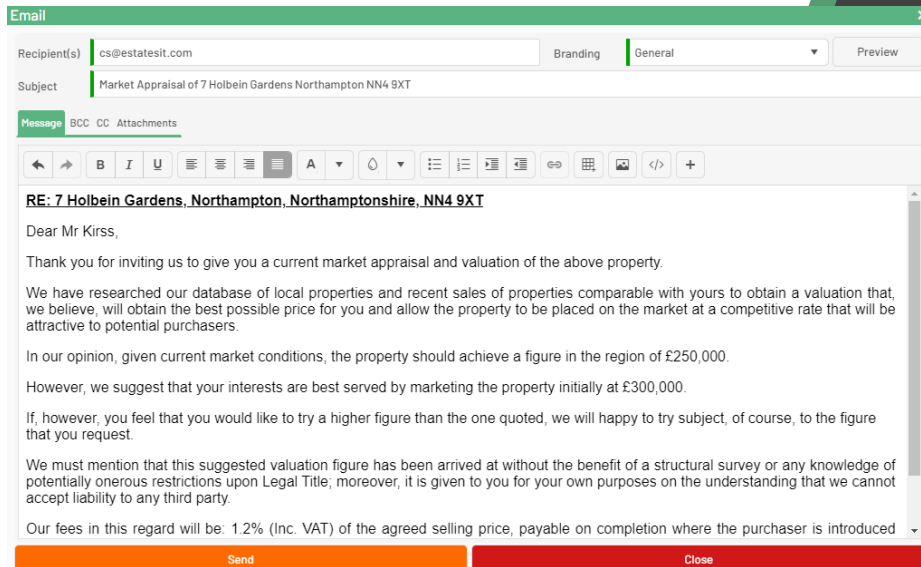
![EstatesIT Software logo]

Send Market Appraisal Email

1. Click on Actions then Send Email.

2. Select Market Appraisal to Owner.

3. If you wish to view the email press on Preview button.

4. If you are happy click on Send.

Preparing the property for marketing

1. If the valuation of the property is recent you will find the property in the Recent tab on the property section.

2. To prepare the property for marketing you need to fill in the following sections:

Details Section

Detail – Market/Bedrooms/Receptions/Bathrooms/Tenure.
Attributes – Portal Attributes/Features.
Descriptions – Brief & Full Descriptions/Bullet Points.
Media – Photos/Floorplans (See other slide).
Rooms – Room Information.
Links/EPC – EPC/Map Information for websites.
Finance - Recheck Fee Information.

Click on Save.
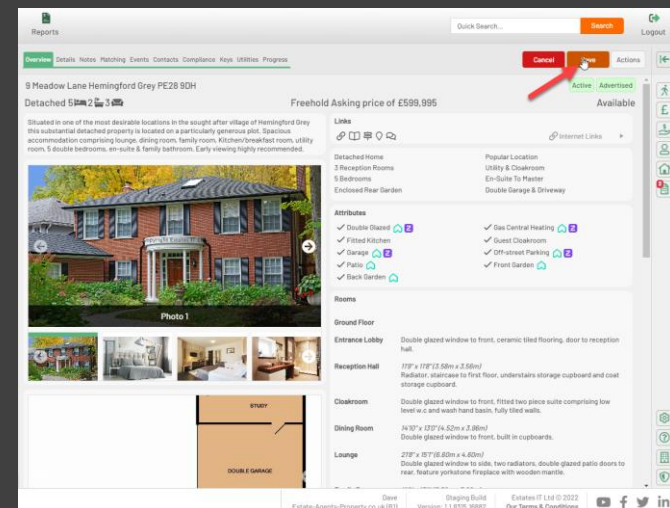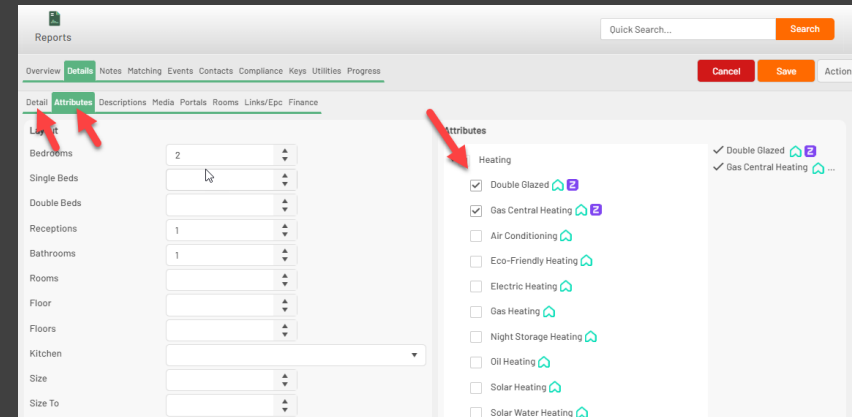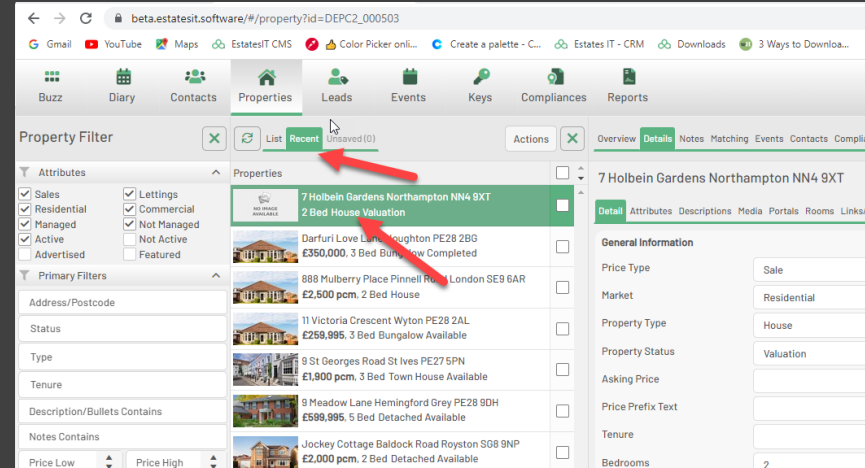
Creating particulars for approval

1. To create a set of particulars click on Actions then Create Particulars & Window Cards.
2. Tick the output you would like to generate then click on Create.
3. This will go to your output rack when the document is ready. You will see this from your flyout menu.
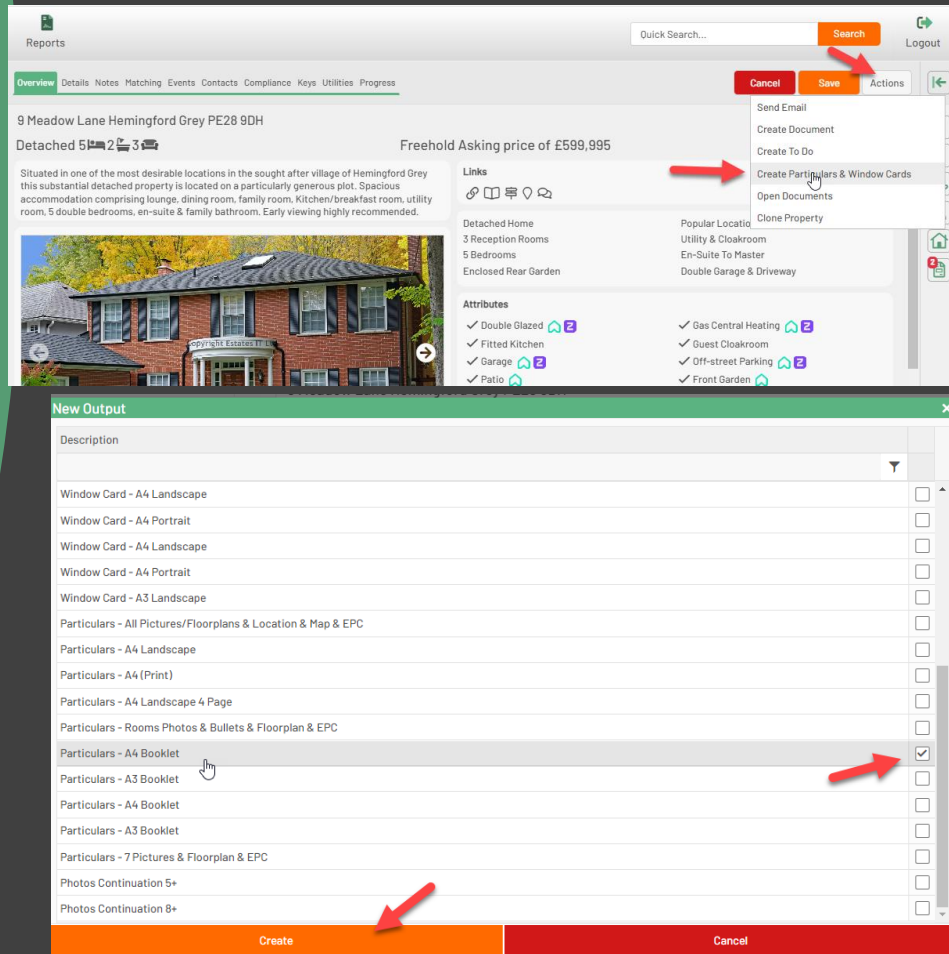4. Click on the little document icon and this will open up the flyout menu select the output that is ready.

NOTE

The particulars will open in word online which may not display correctly.

At the top of the screen you can click on Editing and open in desktop app.
This will open the particulars in your local word software.

Save this as a PDF copy this into Sharepoint.

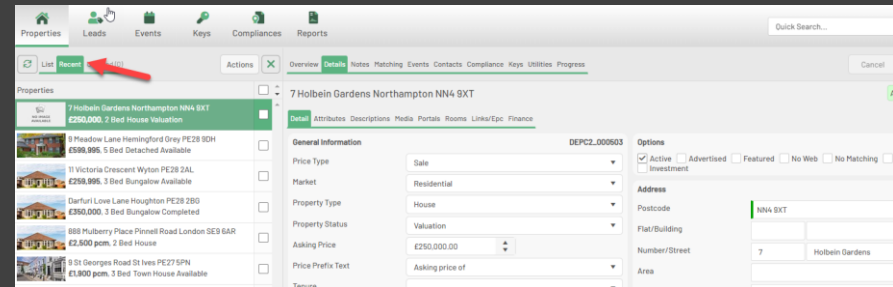You can then attach this to an Email.

Advertise the property

1. Find your property which you would like to advertise again this should be in the recent section.
2. Click on Details/Detail section and then click on Advertised tick box.
3. Dropdown the Property Status box and select Available.
4. Click on Save button to save the property and publish it online.

![EstatesIT Software logo]

What is the Leads section

The leads section will allow you to monitor any leads which come from online (Portals/Websites).

The actions you can do are different based on the lead.