



# EstatesIT.Software Training

By David Weller



## 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.

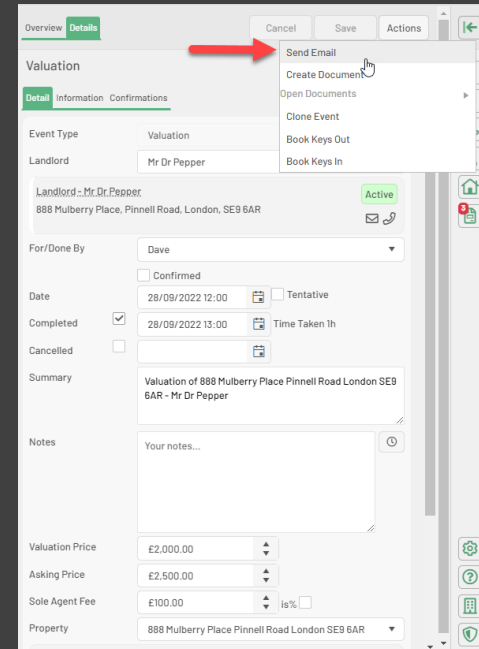
**Save** = You can save this valuation and deal with it later on.

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

This screenshot shows the 'Add Valuation' form with the 'Details' tab selected. The form is divided into two main sections: 'Contact' and 'Property'. The 'Contact' section includes fields for 'Find' (with a search icon and a red 'X' icon), 'Title', 'First Name', 'Surname', 'Source', 'Email', 'Mobile', 'Work Phone', and 'Person Type'. There is a checkbox for 'Create second name'. The 'Property' section includes fields for 'Find', 'Postcode' (with a 'Postcode Lookup...' button), 'Flat/Building', 'Number/Street', 'Area', 'Town/City', 'County', and 'Country' (set to 'United Kingdom'). It also has checkboxes for 'Furnished' and 'Contact address is different'. The 'Price Type' is set to 'Rent (pcm)', 'Market' is 'Residential', and 'Type' is a dropdown menu. There are also dropdowns for 'Tenure', 'Bedrooms', 'Bathrooms', and 'Receptions'. At the bottom, there are three buttons: 'Save' (orange), 'Save & Review' (orange), and 'Cancel' (red).This screenshot shows the 'Add Valuation' form with the 'Diary' tab selected. The form displays a calendar view for 'Tuesday, 11 October 2022'. At the top, there are fields for 'Who is this for?' (set to 'Dave'), 'Date/Time' (set to '11/10/2022'), 'From' and 'To' time slots, and a 'Confirmed' checkbox. Below these, there is a 'Today' button and a 'Show full day' button. The main area shows a list of time slots from 09:00 to 13:00. A dropdown menu is open, showing 'Dave' as the selected option. At the bottom, there are three buttons: 'Save' (orange), 'Save & Review' (orange), and 'Cancel' (red).

## 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.



Overview Details

Cancel Save Actions

Valuation

Detail Information Confirmations

Event Type Valuation

Landlord Mr Dr Pepper

Landlord: Mr Dr Pepper  
888 Mulberry Place, Pinnell Road, London, SE9 6AR

For/Done By Dave

☐ Confirmed ☐ Tentative

Date 28/09/2022 12:00

Completed ☒ 28/09/2022 13:00 Time Taken 1h

Cancelled ☐

Summary  
Valuation of 888 Mulberry Place Pinnell Road London SE9 6AR - Mr Dr Pepper

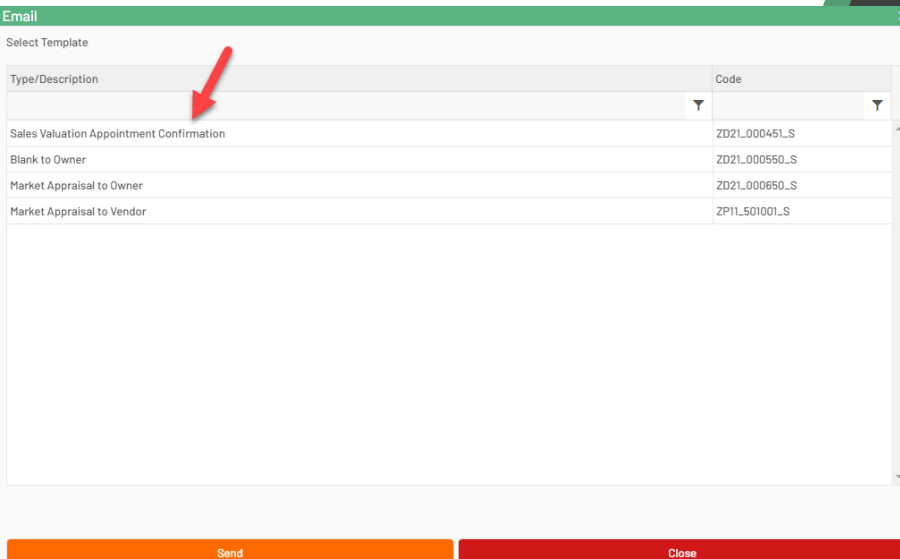
Notes  
Your notes...

Valuation Price £2,000.00

Asking Price £2,500.00

Sole Agent Fee £100.00 Is % ☐

Property 888 Mulberry Place Pinnell Road London SE9 6AR

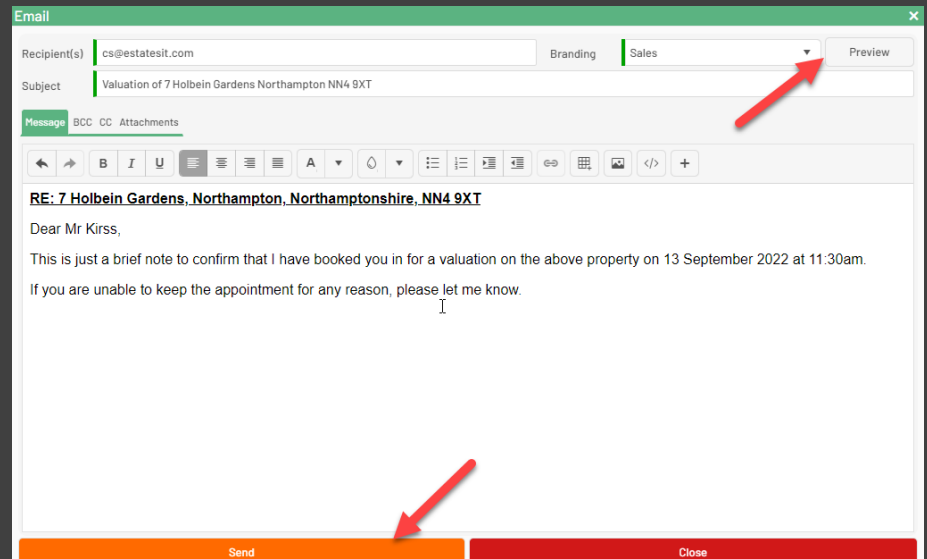


Email

Select Template

Type/Description	Code
Sales Valuation Appointment Confirmation	ZD21_000451_S
Blank to Owner	ZD21_000550_S
Market Appraisal to Owner	ZD21_000650_S
Market Appraisal to Vendor	ZP11_501001_S

Send Close



Email

Recipient(s) cs@estatesit.com Branding Sales

Subject Valuation of 7 Holbein Gardens Northampton NN4 9XT

Message BCC CC Attachments

RE: 7 Holbein Gardens, Northampton, Northamptonshire, NN4 9XT

Dear Mr Kirss,

This is just a brief note to confirm that I have booked you in for a valuation on the above property on 13 September 2022 at 11:30am.

If you are unable to keep the appointment for any reason, please let me know.

Send Close

## 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.

Quick Search... Search Log

Dashboard Filter Estate Agents Property

Follow Ups ↗ Last 31 Days

Appointments Valuation Viewing Meeting To Do Property Events Offers Others All

Event	Description	Date
Valuation	Valuation of 7 Holbein Gardens Northampton NN4 9XT - Mr Davidd Kirss	11/10/2022
Viewing	Viewing for Room 1 15 Hay Street Steeple Morden SG8 0PD	10/10/2022
Viewing	Viewing for Room 2 13 Hay Street Steeple Morden SG8 0PD, Mr Adams, 07909 00018T	10/10/2022
Viewing	Viewing for Room 2 13 Hay Street Steeple Morden SG8 0PD	09/10/2022
Viewing	Viewing for Room 3 13 Hay Street Steeple Morden SG8 0PD	09/10/2022
Viewing	Viewing for Room 3 13 Hay Street Steeple Morden SG8 0PD	08/10/2022
Viewing	Viewing for Room 3 13 Hay Street Steeple Morden SG8 0PD	08/10/2022
Viewing	Viewing for Room 3 13 Hay Street Steeple Morden SG8 0PD	07/10/2022
Viewing	Viewing for Room 3 13 Hay Street Steeple Morden SG8 0PD	07/10/2022
Viewing	Viewing for Room 3 13 Hay Street Steeple Morden SG8 0PD	07/10/2022
To Do	To Do for 19 Acacia Avenue St Ives PE27 6TN	07/10/2022
Viewing	Viewing for Room 3 13 Hay Street Steeple Morden SG8 0PD	07/10/2022
Valuation	Valuation of 111 Mulberry Place Pinnell Road London SE9 6AR - Mr Tesy	07/10/2022

Overview Details Cancel Save Actions

Valuation DEPC2\_000768

Details Information Confirmations

Event Type Valuation

Vendor Mr Davidd Kirss

Vendor - Mr Davidd Kirss  
7 Holbein Gardens, Northampton, Northamptonshire, NN4 9XT Active

For/Done By Dave

Date 11/10/2022 11:30 Confirmed Tentative

Completed ☐ 11/10/2022 12:30 Taken In

Cancelled ☐

Summary Valuation of 7 Holbein Gardens Northampton NN4 9XT - Mr Davidd Kirss

Notes Your notes...

Valuation Price £250,000.00

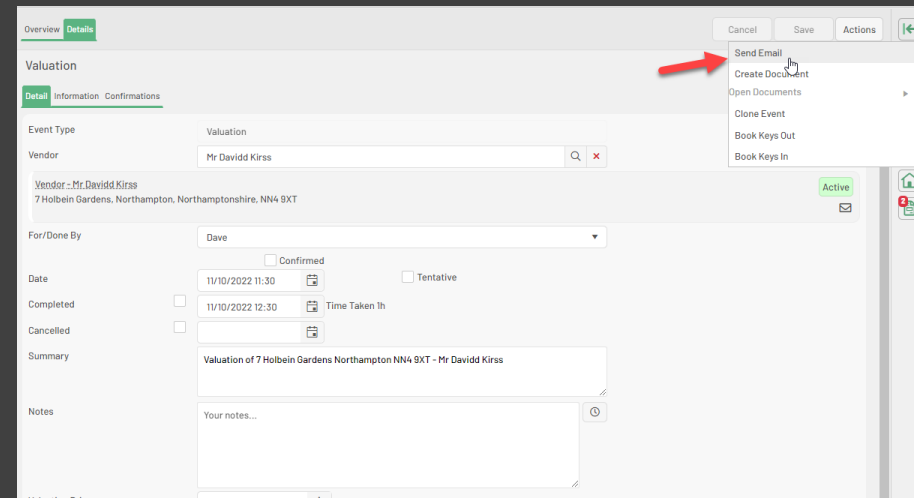
Asking Price £300,000.00

Sole Agent Fee 1%

Property 7 Holbein Gardens Northampton NN4 9XT

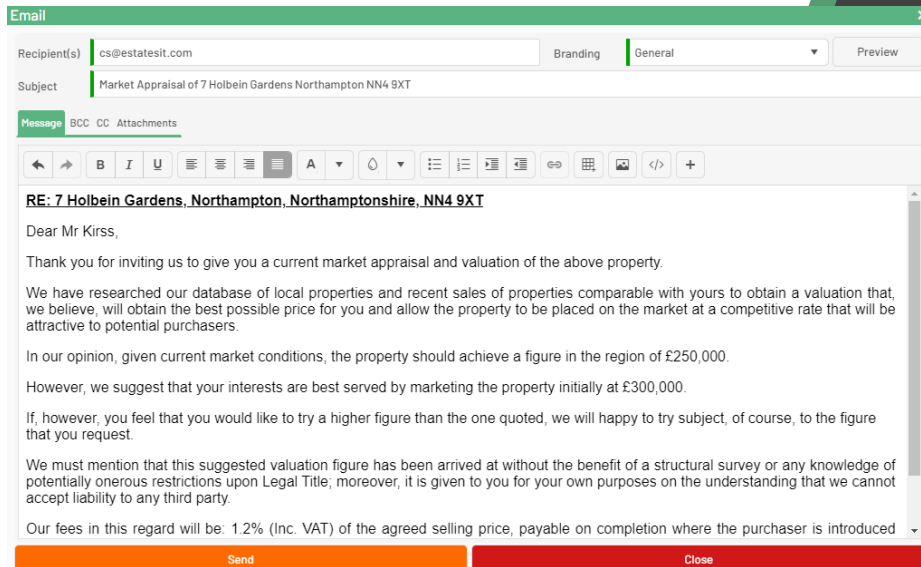
## Send Market Appraisal Email

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.



The screenshot shows the 'Valuation' form in the EstatesIT software. The 'Actions' menu is open, and 'Send Email' is highlighted with a red arrow. The form contains the following details:

- Event Type:** Valuation
- Vendor:** Mr Davidd Kirss
- Vendor Address:** 7 Holbein Gardens, Northampton, Northamptonshire, NN4 9XT
- For/Done By:** Dave
- Date:** 11/10/2022 11:30
- Completed:** 11/10/2022 12:30
- Cancelled:** [ ]
- Summary:** Valuation of 7 Holbein Gardens Northampton NN4 9XT - Mr Davidd Kirss
- Notes:** Your notes...



The screenshot shows the email preview window. The recipient is 'cs@estatesit.com' and the subject is 'Market Appraisal of 7 Holbein Gardens Northampton NN4 9XT'. The email content is as follows:

**RE: 7 Holbein Gardens, Northampton, Northamptonshire, NN4 9XT**

Dear Mr Kirss,

Thank you for inviting us to give you a current market appraisal and valuation of the above property.

We have researched our database of local properties and recent sales of properties comparable with yours to obtain a valuation that, we believe, will obtain the best possible price for you and allow the property to be placed on the market at a competitive rate that will be attractive to potential purchasers.

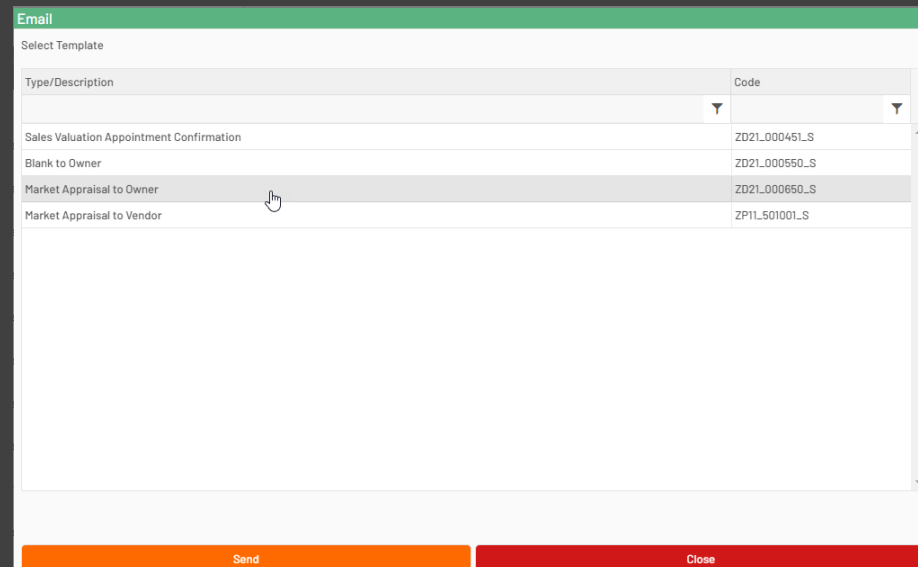
In our opinion, given current market conditions, the property should achieve a figure in the region of £250,000.

However, we suggest that your interests are best served by marketing the property initially at £300,000.

If, however, you feel that you would like to try a higher figure than the one quoted, we will happy to try subject, of course, to the figure that you request.

We must mention that this suggested valuation figure has been arrived at without the benefit of a structural survey or any knowledge of potentially onerous restrictions upon Legal Title; moreover, it is given to you for your own purposes on the understanding that we cannot accept liability to any third party.

Our fees in this regard will be: 1.2% (Inc. VAT) of the agreed selling price, payable on completion where the purchaser is introduced



The screenshot shows the email template selection window. The 'Market Appraisal to Owner' template is selected. The table below shows the available templates:

Type/Description	Code
Sales Valuation Appointment Confirmation	ZD21L_000451.S
Blank to Owner	ZD21L_000550.S
<b>Market Appraisal to Owner</b>	<b>ZD21L_000650.S</b>
Market Appraisal to Vendor	ZP11L_501001.S

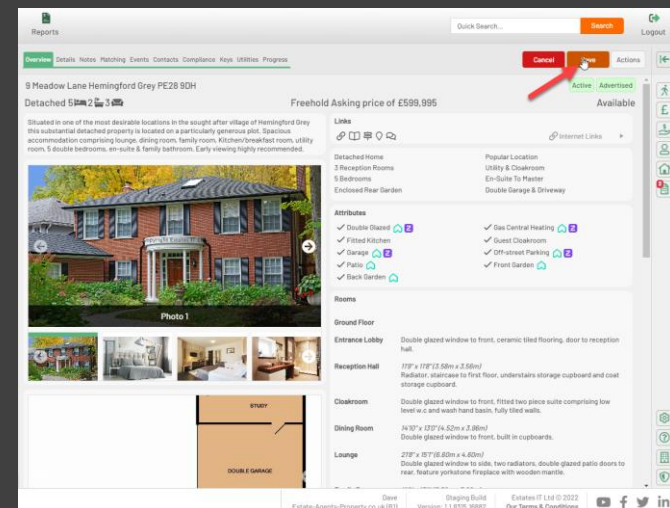
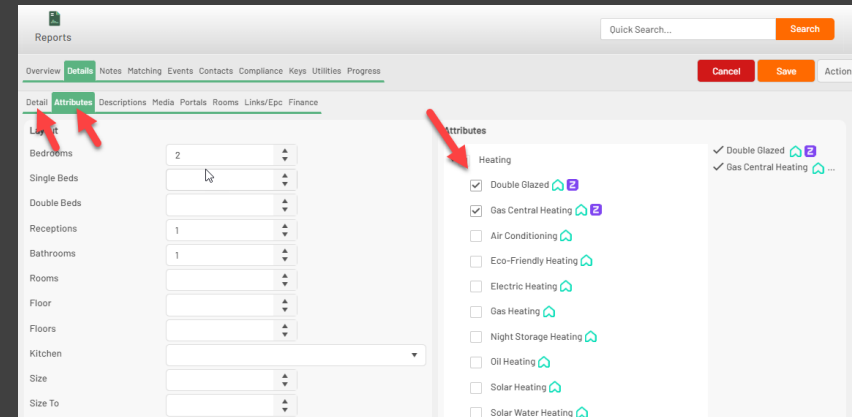
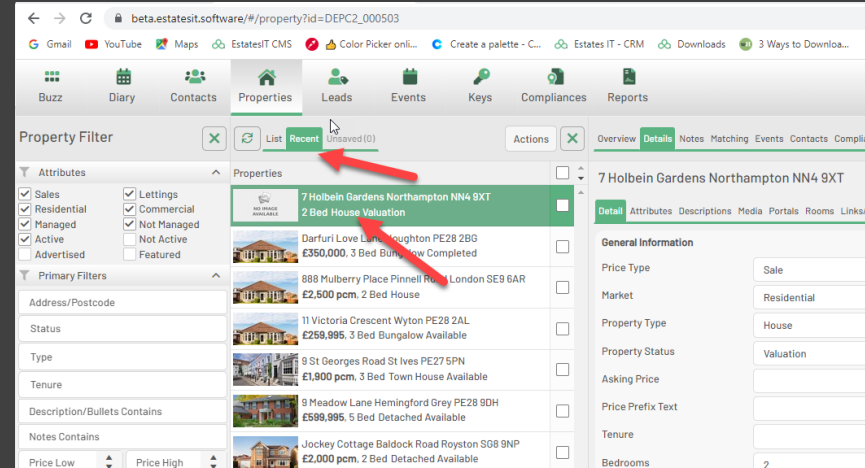
## Preparing the property for marketing

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.

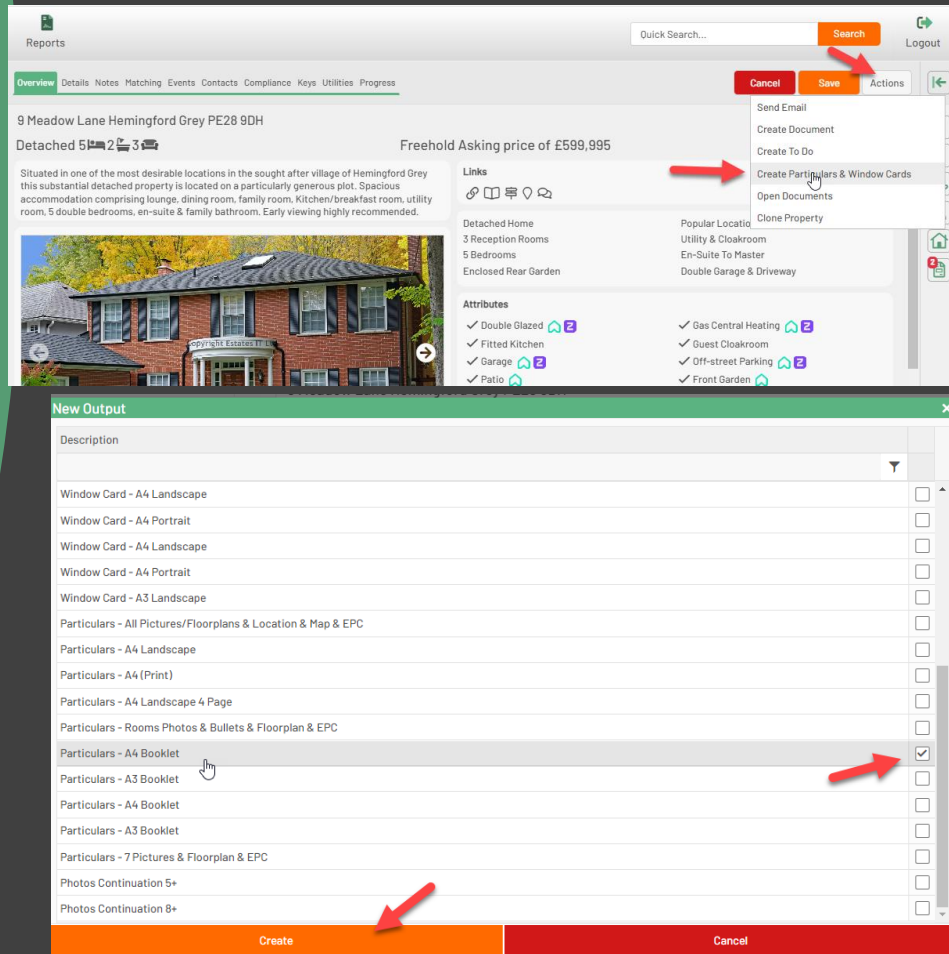
### NOTE

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.



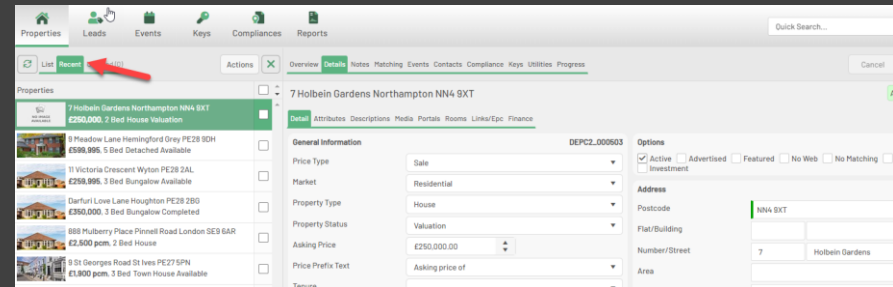
The screenshot displays the EstatesIT software interface. At the top, there's a navigation bar with 'Reports' and a search bar. Below this, a property listing for '9 Meadow Lane Hemingford Grey PE28 9DH' is shown, including its detached status, 5 bedrooms, and a freehold asking price of £599,995. A photo of the property is featured. To the right, a 'Links' section provides additional details like 'Detached Home', '3 Reception Rooms', and '5 Bedrooms'. Below this, 'Attributes' are listed, such as 'Double Glazed', 'Fitted Kitchen', and 'Garage'. A 'New Output' window is open, showing a list of document templates. The 'Particulars - A4 Booklet' option is selected, and the 'Create' button at the bottom is highlighted. A red arrow points to the 'Create' button. Another red arrow points to the 'Actions' menu in the top right corner, which contains options like 'Send Email', 'Create Document', 'Create To Do', 'Create Particulars & Window Cards', 'Open Documents', and 'Clone Property'. A third red arrow points to the 'Particulars - A4 Booklet' option in the 'New Output' window. A fourth red arrow points to the 'Particulars - A4 Booklet' option in the 'New Output' window, which is highlighted. A fifth red arrow points to the 'Particulars - A4 Booklet' option in the 'New Output' window, which is highlighted. A sixth red arrow points to the 'Particulars - A4 Booklet' option in the 'New Output' window, which is highlighted. A seventh red arrow points to the 'Particulars - A4 Booklet' option in the 'New Output' window, which is highlighted. A eighth red arrow points to the 'Particulars - A4 Booklet' option in the 'New Output' window, which is highlighted. A ninth red arrow points to the 'Particulars - A4 Booklet' option in the 'New Output' window, which is highlighted. A tenth red arrow points to the 'Particulars - A4 Booklet' option in the 'New Output' window, which is highlighted.





## 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.



Properties Leads Events Keys Compliances Reports

Quick Search...

Cancel

Link Recent Actions

Overview Details Notes Matching Events Contacts Compliance Keys Utilities Progress

Properties

7 Holbein Gardens Northampton NN4 9XT  
£250,000. 2 Bed House Valuation

3 Meadow Lane Hemmingford Grey PE28 8DH  
£598,995. 5 Bed Detached Available

11 Victoria Crescent Wyton PE28 2AL  
£258,995. 3 Bed Bungalow Available

Darford Love Lane Houghton PE28 2BG  
£350,000. 3 Bed Bungalow Completed

888 Mulberry Place Pinnel Road London SE3 6AR  
£2,500 psm. 2 Bed House

8 St Georges Road St Ives PE27 5PN  
£3,900 psm. 3 Bed Town House Available

7 Holbein Gardens Northampton NN4 9XT  
DEPC2\_000503

General Information

Price Type: Sale

Market: Residential

Property Type: House

Property Status: Valuation

Asking Price: £250,000.00

Price Prefix Text: Asking price of

Tenure: Asking price of

Options

☒ Active ☒ Advertised ☐ Featured ☐ No Web ☐ No Matching ☐ No Portals

Address

Postcode: NN4 9XT

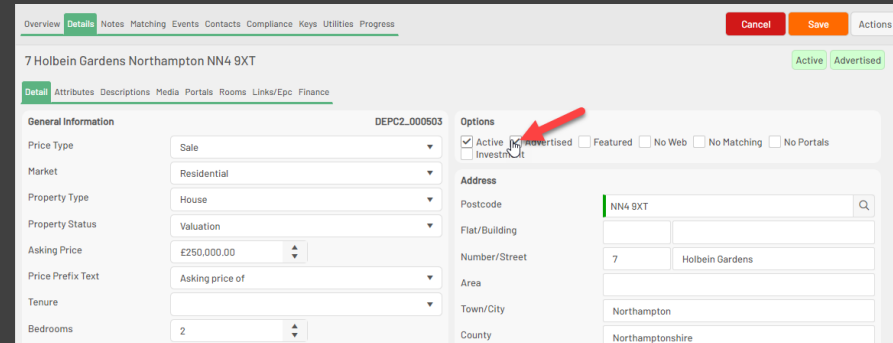
Flat/Building: 7

Number/Street: Holbein Gardens

Area: Northampton

Town/City: Northamptonshire

County: Northamptonshire



Overview Details Notes Matching Events Contacts Compliance Keys Utilities Progress

Cancel Save Actions

7 Holbein Gardens Northampton NN4 9XT

Detail Attributes Descriptions Media Portals Rooms Links/Epc Finance

General Information

Price Type: Sale

Market: Residential

Property Type: House

Property Status: Valuation

Asking Price: £250,000.00

Price Prefix Text: Asking price of

Tenure: Asking price of

Bedrooms: 2

Options

☒ Active ☒ Advertised ☐ Featured ☐ No Web ☐ No Matching ☐ No Portals

Address

Postcode: NN4 9XT

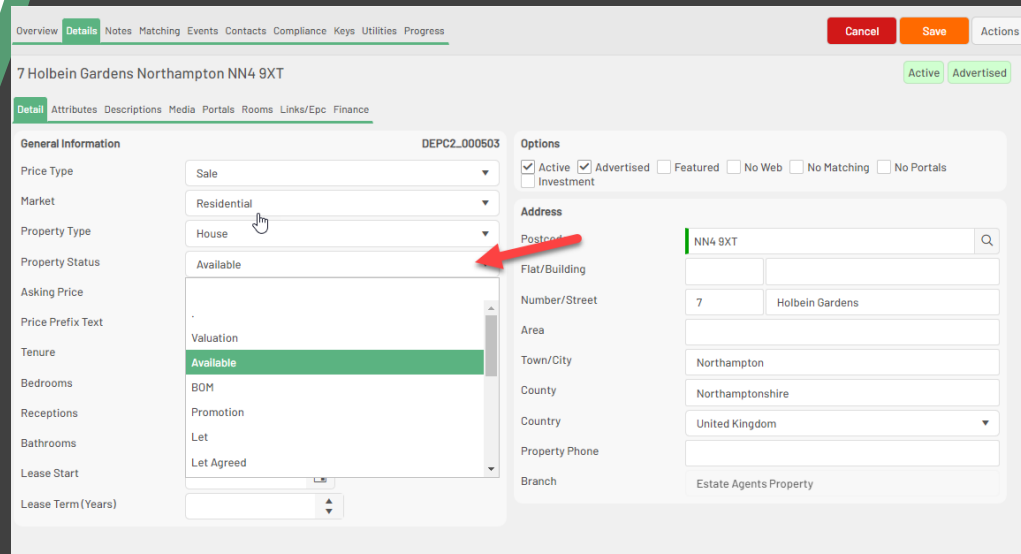
Flat/Building: 7

Number/Street: Holbein Gardens

Area: Northampton

Town/City: Northamptonshire

County: Northamptonshire



Overview Details Notes Matching Events Contacts Compliance Keys Utilities Progress

Cancel Save Actions

7 Holbein Gardens Northampton NN4 9XT

Detail Attributes Descriptions Media Portals Rooms Links/Epc Finance

General Information

Price Type: Sale

Market: Residential

Property Type: House

Property Status: Available

Asking Price: .

Price Prefix Text: .

Tenure: .

Bedrooms: BOM

Receptions: Promotion

Bathrooms: Let

Lease Start: Let Agreed

Lease Term (Years): .

Options

☒ Active ☒ Advertised ☐ Featured ☐ No Web ☐ No Matching ☐ No Portals

Address

Postcode: NN4 9XT

Flat/Building: 7

Number/Street: Holbein Gardens

Area: Northampton

Town/City: Northamptonshire

County: United Kingdom

Property Phone: Estate Agents Property

Branch: Estate Agents Property



## 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.

