System Overview - Scheduler

Introduction

The Multilink Scheduler is a Contact Management Program and an Office Automation Program, designed to keep you on track, set up your office procedures and scheduling them to happen in a uniform and routine manner. Even if a key member of staff is away no task will be left undone.

Set up and Operation

Throughout the Proplink and the Presentations programs you can schedule contacts to be made as you go. In Proplink at the Current Listings, Potential Vendors, Shared Listings simply click onto the small photo of the property or if you are in the 'Text' mode double click on to the address (If you are in the Buyers Register double click on to the Buyers Name) and a "Dialogue Box' will appear. Type in your message and then double click onto the date. When the calendar appears select the date that you wish to be reminded. The message you put in is now stored against that date and will be listed in the Daily Tasks for that date. If you are in the Homeowners Directory located within the Presentations Program, you can double click onto the Property Address to create the same 'Dialogue Box' to insert your message and Contact Date.

To setup the Automation Routines for Potential Vendors, Current Listings, and After Sale properties please read the following.

From Login you arrive at the Scheduler Main Menu

In the left-hand frame there are 4 buttons. Each button relates to a Proplink Database

Pre Listing
Current Listing
After Exchange
History

In the right hand frame there are 4 buttons.
Master returns all the uncompleted tasks between nominated dates

Daily Tasks allows the user to set up tasks required to be done on a daily basis
Setup allows the user to setup their own sequence of activities for properties in any of the 4 databases in the Setup Menu
Schedule Transfer, allows outstanding tasks to be transferred between sales staff in the event of a member of staff resigning and being deleted as a User in Proplink.

To begin

- Click **Set Up** button to set up templates of standard tasks you require for properties registered in the Pre Listing, Current Listing or Sales History databases
- Type in the tasks required and in the Number of Days column insert which day you want this task performed. *Example: In the Current Listing database a Task may be to Instruct sellers Solicitors. The day you want this task to be scheduled is 3 days from the Listing date or in the Pre Listing database you may wish to follow-up a Potential Vendor on a particular date.*
- Set up a whole series of tasks for each database.

Attaching a property to the scheduler

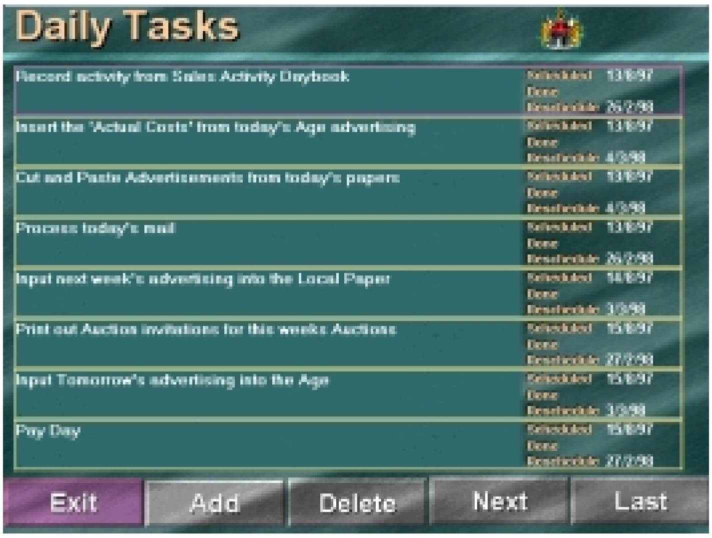
In the MLS Scheduler Main Menu select the database you require

- Click the Import button to view all the properties in that database

- Select the property you wish to attach to the Scheduler and then click the Done button. The selected property will now be added to the Scheduler program
- Click onto the address of the imported property. At the left side of the screen will be an empty frame with 6 small buttons at the bottom.
- Click the small Add button to manually inset the tasks required OR click the small Import button to return the pre programmed template of tasks.
- In the Pre Programmed template you can manually select the tasks you require, by clicking into the check box next to the task. Then once you have selected all of the tasks you require click the OK button.

  OR
- If you wish to attach ALL of the scheduled tasks to the property simply click the ALL button and all of the scheduled tasks will be returned against the subject property.
- Add new tasks by clicking the small Add button or Delete scheduled tasks by nominating the task (by clicking onto it) and then clicking the small Delete button.
- Change any of the dates by double clicking the word Schedule, Done or Reschedule. This action will return a calendar. Simply click the required date and then click the Change button
- Clicking the small Print button will print a report detailing the scheduled tasks and the date on which they were to be done as well as the date that they were actually done. This report provides the In-Process control required by ISO 9002.

Operating the Scheduler



Clicking the Master button on the MLS Scheduler Main Menu will allow you to return all uncompleted tasks between any two dates. Once a task has been completed click the word Done and then click a date on which the task was performed. If a task needs to be rescheduled, click on to the word Reschedule and select a new date.

- ➪ If a Daily Task is of a repetitive nature e.g. 'Cut out and Cost yesterday's advertisements', then, once the Task has been completed it should be immediately rescheduled to be performed the following Day/Week/Month etc. or on any other appropriate date. Clicking Done will simply retire it to the Daily Task Template
- ➪ It is recommended that the Master button on the MLS Scheduler be used every day to stay proactive and on course.

Clicking the Transfer button on the MLS Scheduler Main Menu allows you to transfer a whole schedule to another member of staff. This function is activated immediately a sales person has been deleted from the Proplink User table. If the retiring sales person has uncompleted Tasks they can be itemised and Transferred to another member of Staff to complete

How to automate the Pre Sale process

After you have saved a property in Current Listing

- Open the Scheduler program
- Import the newly listed property into the scheduler for Current Listings
- Import your schedule of events for the Pre Sale process
- Every day open your Master button in the Scheduler program and complete all of the tasks nominated there.
- When a task requires you to use the Pre Sale Presentations program, simply find that property in Presentations and then click on to the required task and then click Print
- When you have completed the task simply click 'Done' against that task in the Scheduler program

How to automate the After Sale process

After you have Sold a property

- Open the Scheduler program
- Import the newly sold property into the scheduler for After Exchange
- Import your schedule of events for the After Exchange process
- Every day open your Master button in the Scheduler program and complete all of the tasks nominated there.
- When a task requires you to use the After Sale Presentations program, simply find that property in Presentations and then click on to the required task and then click Print
- When you have completed the task simply click 'Done' against that task in the Scheduler program