Multilink Systems

Manual for the Personal Assistants of High Achievers in Real Estate

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Key Tasks for PAs

A Manual for the PA behind a High Achiever

Every Top Real Estate Agent needs the support of a Personal Assistant. The Multilink System has its own on-board 'Virtual Personal Assistant' program that keeps the agent in front of their clients (where the money is to be made)
This manual details these activities and delivers the role of the dynamic PA in the real estate 'Business Cell'.
The Dynamic Personal Assistant works in unison with the real estate agent following-up, administrating and providing the Customer Relationship fundamentals that every estate agent requires

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Part B

Personal Assistants to High Achievers

1 HIGH ACHIEVERS - PA TASKS

1.1 Overview

MULTILINK QUICK START

Real Estate Agents are in the SERVICE industry.

Service your customers well and they will look after you.

- Successful estate agents rely heavily on 'Referral' business.
- Referrals originate from
    - previous Customers who have had a happy experience when they were doing business with you OR
    - people who know of a Customer who has had that 'happy experience' when they did business with you.

Referred sellers are prepared to pay higher commissions.

So who are these 'Customer Categories' that create referrals? And, how can you GUARANTEE that every one of these 'Customer Categories' who deals with any member of your company will have that 'Happy Experience'?

The answer is

1. "Define what YOU call a 'Happy Shopping Experience" for each individual Category of Customer that you engage with.
2. Put SYSTEMS into place to GUARANTEE that 'Happy Shopping Experience' EVERYTIME

Who are the 6 Categories of Customers that a real estate agent engages with?

- Sellers
- Buyers
- Purchasers
- Potential Sellers
- Suppliers
- Employees
    - Sales Team
    - Administration

Each Category needs to be managed a different way
How do you GUARANTEE that each of the above 6 Customer Categories has that 'Happy Experience' with your company?

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SYSTEMISING THE REAL ESTATE PROCESS

Objective #1 –
Creating a Happy Experience for your
SELLER CATEGORY.

Keep your 'Current Vendors' informed throughout the selling process.
There are many key contact points with a seller – your vendor relationship could suffer if you neglect to perform at any of these contact points.
Key Contact Points exist during the Pre Sale and After Exchange periods. Keeping in-touch 'After Settlement' is not a Key Contact Point (it is an Optional Extra).

Key Contacts Points are

- OFI Reports -at the end of every OFI
- Activity Reports – every Tuesday
- Pre Sale Activities – Located in 'Tasks' under 'Pre Sale Activities'
- After-Exchange Activities - Located in 'Tasks' under 'After Exchange Activities'

Issue all Sales Staff with – a) 'Buyer Enquiry Forms' – from Proplink 'Stationery Cabinet'
b) 'Open-For-Inspection Reports' – specially printed reports with carbonized cover sheets that can be torn off and left at the property.

At OFI's

- all attendees must leave their Name & Mobile No. recorded on 'OFI Report'.
- The 'Original Face Sheet' of this report to be left behind (with a quick précis) after every OFI.

At Office

- all enquiries must leave their Name & Mobile No. recorded on 'Buyer Enquiry Form'

At the end of every working day every sales person MUST register **ALL** 'OFI Attendees' and 'Enquiries' for that day into **Proplink** > **Contacts** –

- In the 'Category' field of the 'Contacts Card' select 'Unqualified Buyer'
- In the 'Notes' field insert why and how that person contacted you e.g. OFI @ 2 Smith St or The Age on 2 Smith St or Board @ 2 Smith Street, Internet@ 2 Smith St etc.
- In the 'Enq Source' field select the source of enquiry

To view a video of this task click here

At the beginning of each working day PA searches **'Contacts'** database for '**Unqualified Buyers**'. All of the 'Unqualified Buyers' will be returned. Clicking onto a name in the index on the right side of the screen returns that 'Unqualified Buyer's" card and also displays the Initials of the sales person who registered that 'Unqualified Buyer' at the top RH of the screen
The PA phones each Unqualified Buyer and qualifies them using the script below:

QUALIFYING PROCESS BY PERSONAL ASSISTANT (Script)

Hello *(Buyer's Name)*
I'm *(Your Name)*
From *(Company Name)*
In *(Suburb)*
I'm *(Salesperson's Name)* 'Personal Assistant'

You met *(Salesperson' First Name)* at *(OFI Address)* on Saturday
or
You spoke with *(Salesperson' First Name)* on the phone yesterday about a property you saw advertised in *(Newspaper Name)*

(Salesperson's First Name) asked me to give you a call to see if there is any further information he can forward to you about that property?
(If yes) Could I get *(Salesperson's First Name)* to give you a call back?

(If No) Would you be interested in receiving information about our New Listings before they are released to the Open Market?
(If Yes)
(Buyer's First Name) we have a **'Preferential Buyer Program'** that sends pre-release 'Electronic Brochures' and 'SMS Text Invitations' to attend special week night showings prior to that property's release on to the open market.
Could I take your email address?

The Preferential Buyer Program also offers a range of other services such as free Mortgage Comparison to make sure you are getting the best mortgage available. On average you can find out how to save at least $15pw on your mortgage. Would you be interested to know how that's done? – Fine, I will get *(Banker's Name)* our Mortgage Expert to give you a call.

Just a couple more quick questions?

(Buyer's First Name)
Could you please give me your preferred Buying Price Range?
And what type of property are you looking for?
Will you be living in the new property yourself?
Could I also ask for a Home Contact Number?
Do you want to make your purchase within the next 3 months?
Will you be selling a property when you purchase?
(If Yes) Could we offer you a Free Opinion of its value?

Thank you very much *(Buyer's First Name)*; *(Salesperson's First Name)* will be in touch with you shortly.

Information Collected and entered on the Buyer's Card by the end of a successful conversation

Email Address?	❑	
Mortgage Potential?	❑	** Contact Multilink to setup your Personal Bankers
Price Range up to?	❑	
Property Type?	❑	
Home Phone No?	❑	
O/O or Investor?	❑	
Hot Prospect?	❑	
Potential Seller?	❑	
Potential Referral?	❑	Open 'Research' program if you want to manage referrals

At the end of the conversation you can now fully complete the buyers card inserting the 'Price To' details plus all of the new information that you have just found out, then change the 'Category' on the Contacts Card from 'Unqualified Buyer' to 'Buyer' by unticking 'Unqualified Buyer' and ticking 'Buyer' and then tick the 'Potential Vendor', 'Potential Mortgage', 'Hot Prospect' boxes (if applicable). To view a video of this task click here

The Unqualified Buyer is now a Buyer. At the bottom of the Buyers Card you will now observe that Proplink has returned properties that match this buyer's profile. **'Found'** = Number of matching properties: '**New'** = Number of properties Found that have not been Introduced to that Buyer as yet and **'Other'** = Number of properties Found in other Property Types that match Area and Price profile of that Buyer.

Click **'Properties'** button if you wish to view the 'Found' properties.
Click onto any of the returned properties and if you wish to Introduce this property to the Buyer click 'Send' then select 'SMS Text' or 'E-Brochure'.
If you wish to send that Buyer multiple 'E-Brochures' or wish to alert that Buyer to several properties via 'SMS Text', hold the 'Ctrl' key down when you click onto each of the properties required, then click 'Send' then 'E-Brochure' or 'SMS Text'.
To view a video of the 'Sending EBrochure' task click here
To view a video of the 'Sending SMS Text' task click here

To dispatch the 'E-Brochures' go to 'Maintenance' > Transfers > Transfer. (E-Brochures should be sent in bulk only once or twice per day, usually after you have qualified ALL of the 'Unqualified Buyers') To view a video of the 'Dispatching EBrochures' task click here

If you do not feel a 'Found' property will suit the Buyer - select that property by clicking on to it, click 'Add Activity' > in 'Activity Type' select 'Introduced' > in 'Activity Result' select 'Not Interested', and insert reason in 'Notes' (optional). If you feel that several of the returned 'Found' properties will not suit that Buyer, the hold the 'Ctrl' key down > select those properties > click 'Add Activity' > in 'Activity Type' select 'Introduced' > in 'Activity Result' select 'Not Interested', and insert the reason in 'Notes' (optional). To view a video of how to record 'Unsuitable Properties' click here

All Buyers who attend OFI's will need to be registered against that OFI Property's Activity Report. To do this > When a Buyer is registered > locate the OFI property they attended by clicking 'Properties' (if the OFI Address they attended is not visible > click 'Search' and find it > highlight it > click 'Add Activity' > in 'Activity Type' select 'Inspected' > in 'Activity Result' select the result of that activity e.g. Not Interested and insert the reason in 'Notes'. In 'Activity Date' select the Date Inspected. To view a video of how to record 'OFI Attendees' click here

When you leave that Buyers Card, at the bottom of the card, New should = 0 which means that all properties 'Found' have been dealt with.

The second action that MUST be taken so that accurate 'Property Activity Reports' can be produced every Tuesday is every time a new 'Current Listing' is created in Proplink, select that New Listing then click 'Contacts' which will return registered 'Buyers' whose profile matches that property.

To alert Buyers of a New Listing via SMS Text.
Highlight a Buyer (to alert several Buyers at the same time) > hold the 'Ctrl' key down and select those Buyers who you feel may be interested in viewing the property) then click 'Send' > SMS Send (SMS can only be sent to those Buyers who have a mobile phone number)

To send Buyers an 'E-Brochure' of a New Listing
Hold the 'Ctrl' key down and select those Buyers who you feel may be interested in receiving the 'E-Brochure' then click 'Send' > 'E-Brochure'. All 'E-Brochures' are distributed when you do your next Transfer (Maintenance > Transfers > Transfer). 'E-Brochures' can only be sent to those Buyers who have an email address.

**** Remember – if the above tasks are not religiously performed every day, the activity on every property will not be monitored and your 'Activity Reports' will be deficient.

To create a weekly 'Property Activity Report'

- Select the property in 'Current Listings' > 'Activity' > 'Print'.
- For 'Hard Copies' of the 'Activity Report' > select your printer and print.

To view a video on creating a 'Property Activity Report - hard copy click here

- For email of the 'Activity Report' > in the Print dialog box select > 'Print to file' and then in the 'Type' box select PDF. In the … box select at folder into which you file all of your Property Activity Reports > click OK to file this Activity Report as a PDF File in that selected Folder.
- Return to the main 'Current Listings' screen > double click on that vendor's email address. Write a small note (pro-forma notes are found in 'Tasks') > attach the 'Activity Report' > Send.

To view a video on creating a 'Property Activity Report' - email click here

Every Wednesday send your Vendor an updated OFI Schedule (if the original schedule has been altered).

To manage the other 'Tasks' associated with Pre Sale activities. Go to Proplink > Current Listings >

Select a property > Tasks > Pre Sale Activities.
To view a video of 'Pre Sale Tasks' click here
To view a video of 'Ordering For Sale Board' click here
To view a video of 'Ordering Brochures' click here
To view a video of 'Ordering Local Paper and Company Magazine' click here

To monitor the weekly activity of each sales person
Open 'Research' > 'Key Performance Indicators'

When Contracts are exchanged both the Purchaser AND the Vendor still need to be managed correctly during this 'After Exchange' period, prior to Settlement. In Proplink go to Sales History > Search for a property > Tasks > After Exchange Activities. To view a video of 'After Exchange' tasks click here

To automatically Schedule 'Daily Activities' (required to be done every day in your business), or to automatically Schedule the 'Pre Sale' Activities (required to be performed on a property after it is listed and before it is sold), or, to automatically Schedule the 'After Exchange' Activities (required to be performed between the time that Contracts are Exchanged and the property is 'Settled'), and, to track their progress. Go to the 'Scheduler' program in the Multilink Systems suite of programs (see the Multilink Systems Manual or 'Key Tasks' to find out how to operate the Scheduler program). The Scheduler Program keeps you structured by reminding you what activity needs to be done every day.

Objective #2 –
Creating a Happy Experience for your
BUYER CATEGORY.

The first thing an agent does when the secure a Listing is to advertise for a Buyer. Agents spend a lot of money advertising for buyers but exert very little effort to effectively manage them. The buyer for your next listing is probably already on your database.
Buyers are

- **what every seller wants**
- **the source of listings**
- **the source of mortgages**
- **the source of referrals**
- **future property owners in your area**
- **potential landlords**

At the end of every working day 'welcome' all of the New Buyers who registered with you that day.
Bulk Messaging > activate Contacts > Search > 'First Contacted From' and 'First Contacted To' > under 'Restrict search to records that have' activate 'Email' > under 'Restrict search to these categories' activate 'Buyer' > click 'Search.
Every Buyer who registered that day with an email address will be returned > click 'Emails' > select 'Current Buyers' > select '1. Starting the Relationship' > click 'Send'. The message in your Welcome Email will be distributed.

Every Thursday – Build the relationship by sending every Buyer in your database a Catalogue of <u>All</u> your New Listings.
Bulk Messaging > activate Contacts > Search > under 'Restrict search to records that have' = activate 'Email' > under 'Restrict search to these categories' = activate 'Buyer' > click 'Search. Every Buyer who is registered in your database with an email address will be returned > click 'Emails' > select 'Current Buyers' > select '2. Weekly New Listing Catalogue' > click 'Send'. The message in your New Listings Catalog will be distributed.
NB: You can tailor this message every week to personalize it a little.

Double click on the http://www.multilink.com.au in the 'URL' Column > when the page opens > File > Edit with Microsoft FrontPage > insert your little message at the top of the email > close the page and save your changes > close the email > click 'Send'.

When a Buyer returns an email and tells you they have purchased through another agent, you can still continue to build the relationship (they are now a future Landlord, Vendor, Referral Source)
Go into Proplink > Contacts > Search for that Buyer > Change their 'Category' to 'Bought via other agency' > go to 'Bulk Messaging' > activate Contacts > Search for that Buyer > click 'Emails' > select 'Current Buyers' > select '3. Purchased through External Agent' > click 'Send'. The 'Congratulations on your New Purchase' email will be distributed.

On the Last day of every month Verify that every Buyer in your database is still active. Show them that you are still interested in them.
Bulk Messaging > activate Contacts > Search > under 'Restrict search to records that have' = activate 'Email' > under 'Restrict search to these categories' = activate 'Buyer' > click 'Search. Every Buyer who is registered in your database with an email address will be returned > click 'Emails' > select 'Current Buyers' > select '4. Monthly Buyer Verification' > click 'Send'. Every registered Buyer will be sent an 'Are You Still Looking For Real Estate' email.

To automatically Schedule all of the above 'Daily Activities' and 'Pre Sale Activities' and to track their progress. Go to the 'Scheduler' program in the Multilink Systems suite of programs (see the Multilink Systems Manual or 'Key Tasks' to find out how to operate the Scheduler program. The Scheduler Program keeps you structured by reminding you what activity needs to be done every day.

Objective #3 –
Creating a Happy Experience for your PURCHASER CATEGORY.

Buyers become Purchasers. Purchasers become Landlords and/or Potential Sellers (on average 5-7 years into the future) plus they become an ongoing Referral base.

Track the 'Tasks' you need to perform for Purchasers by selecting the property address in Proplink > Sales History > Tasks > After Exchange Activities

To automatically Schedule the above 'After Exchange Activities' and to track their progress. Go to the 'Scheduler' program in the Multilink Systems suite of programs (see the Multilink Systems Manual or 'Key Tasks' to find out how to operate the Scheduler program. The Scheduler Program keeps you structured by reminding you what activity needs to be done every day.

Objective #4 –
Creating a Happy Experience for your POTENTIAL SELLERS.

Potential Sellers want two things from their Agent

1. To find them a Buyer
2. To negotiate a price that is in their favour

The agent they select to sell their property will be the one that convinces them they will achieve the above two objectives.

Many times Potential Sellers take several weeks or months to organize themselves before they commit to selling. During this period it is imperative to keep in touch.

Every Month send all Potential Sellers a Catalogue of Recently Sold Properties, accompanied by a 'Market Wrap'

Bulk Messaging > activate Potential Vendors > Search > under 'Restrict search to records that have' = activate 'Email' > click 'Search. Every Potential Vendor who is registered in your database with an email address will be returned > click 'Emails' > select 'Potential Vendors' > select 'Local Property Update' > click 'Send'. Every Potential Vendor with an email will be sent an update of Recently Sold Properties (yours and/or other agents' sales).
You can also Print these reports in Proplink and send them as hard copy newsletters – if required)

Every 3 months send EVERY CATEGORY a 'Homelink Newsletter'
Bulk Messaging > activate Contacts > Search > under 'Restrict search to records that have' = activate 'Email' > click 'Search. Every Contact who is registered in your database with an email address will be returned > click 'Emails' > select 'Homelink Newsletter' > select 'Newsletter'. Every registered Contact will be sent your latest Newsletter.
NB: You can tailor this Newsletter.
Double click on the http://www.multilink.com.au in the 'URL' Column > when the page opens > File > Edit with Microsoft FrontPage > insert your message > close the page and save your changes > close the newsletter email > click 'Send'.

Objective #5 –
Creating a Happy Experience for your SUPPLIER CATEGORY.

Every agent has several suppliers

- Board Companies
- Internet Publishers
- Photographers
- Graphic Houses
- Ad Placement Agencies
- Pointer Board Erectors
- Accountants
- Valuer General
- Solicitors
- Other 'Strategically Aligned' real estate offices
- Etc. Etc

Proplink makes it easy to deal with your suppliers. The 'Advertising Templates' located in Tasks enable you to create your own 'Board', 'Brochure', 'Local Paper', 'Daily Paper, advertising proofs in seconds.

To create a advertising proof.

Select a property in Proplink > Current Listings > then click 'Tasks' > 'Advertising Templates' > select the Template you require > Design > Preview. The proof can then be emailed to your supplier.

The 'Body Copy' of any of the proofs will default to the 'Advertising Copy' you place into Proplink. If you have tailored copy for your Boards, Brochures, Local Paper etc. These tailored 'Body Copies' can be inserted into Proplink by clicking the 'Additional Copy' button next to Advertising Copy.

If you insert separate advertising copies for Boards, Brochures etc you will need to instruct the Advertising Templates to read those additional 'Body Copies' rather than reading the default Advertising Copy.

To reset the 'Advertising Templates' to read the 'Additional Copy' field instead of the default Advertising Copy field.

- Go into Tasks > Advertising Templates > select the appropriate Template > Edit > Copy

Name = change to the appropriate advertising 'Body Copy' > OK.

- Then go into that appropriate Template through clicking 'Design' > click onto the box containing the Copy then in the Tool Bar at the top of the screen click the drop-down-box arrow and change the words from "Precis_Description' by selecting the 'Copy_Body' field.

Proplink will multi-load to all of your Internet Sites simultaneously. When you alter a Current Listing it will automatically update all of those Internet Sites.
See instructions in Manual

Proplink has a 'merge-letter-library' located in Tasks to automate your communications with Solicitors etc.

Proplink automates downloads of Sales History information from the 'Valuer General'

Increase your chances of selling any of your listings by forming your own Strategic Alliance Network with other real estate offices of your choice. If you share a listing with any of those strategic alliance offices and they Introduce a lead that buys a property you can pre set the commission split you wish to pay (or alter it at your wish).
When any of your listings arrive at a Strategic Alliance Office it can be viewed by clicking the 'Shared Listings' button. Proplink automatically matches buyers registered on the database of every Strategic Alliance Office and alerts that office of any potential buyers they may have. If the Strategically Aligned offices Introduced any of your listings to their Buyers, Proplink records this information and informs your office of that activity. The activity by those Strategically Aligned offices will also be recorded on your Property Activity Reports.

Your office can also receive properties for sale - from other real estate offices of your choice - giving your office the opportunity to Introduce and Sell those properties to buyers registered on your database.

Objective #6 –
Creating a Happy Experience for your
EMPLOYEE CATEGORY.

Sales people enjoy working in a structured, organised and disciplined environment. Creating an environment where 'ordinary' people can achieve 'extra-ordinary' results is the job of the principal of the office.

Systemising your sales processes, simplifying the workloads for both your Administration Staff and Your Sales Team at the same time as you service your client base better should be the sole objective of management.
See the help files of

- 'Key Tasks' for Personal Assistants (Key Tasks_PA) and
- 'Key Tasks' for Sales Staff (Key Tasks_Sales)

1.2 Managing Bulk Messaging

Bulk Messaging can be via Email, Print Mail or SMS Text and can be any message you wish to send.
'Bulk Messaging' enables you to send messages to any number of Contacts at the same time. The possibilities are endless.
You can export a 'Merge List' to a Source File and then integrate the Merge List into a Document for printing.

You can export mobile phone numbers, create a message and send that message via SMS Text to those mobile numbers.
You can export automatically insert a 'Merge List' into any 'html template' you wish to create and email those 'html templates' to that 'Merge List'.

Bulk Messaging has 3 components
A) Templates - both email and paper based mail
B) Links or Attachments
C) Merge Lists

Templates - convey the messages you wish to send
Links - are inserted into the emails; Attachments - accompany the paper based mail
Merge Lists - Are the lists of reciepients to which you wish to send the Bulk Message

Templates require no alterations once they are established
Links need to be updated on a weekly, monthly or periodic basis
Merge Lists need to be created every time you want to send a Template

Every week the following .pdf Email Links need to be updated
1. Buyer-Lists
2. New-Listings Catalogue

Every month the following .pdf Email Links need to be updated
1. Sales-History Catalogue

'Bulk Messaging' enables you to send messages to any number of Contacts at the same time. The possibilities are endless.
You can export a 'Merge List' to a Source File and then integrate the Merge List into a Document for printing.
You can export mobile phone numbers, create a message and send that message via SMS Text to those mobile numbers.
You can automatically insert a 'Merge List' into any 'html template' you wish to create and email those 'html templates' to recipients on that 'Merge List'.

Examples of 'html Templates' are.
- A **'Welcome to a New Property Seeker'** sent to every buyer that registers with your company
- A **'New Listing Catalog'** sent to your Buyer Database every week.
- A **'Buyer Update'** query sent to your 'Buyer Database' once a month asking if they are still active buyers.
- A **'Recent Sales Catalogue'** sent to your 'Potential Vendors'.
- A **'Congratulations on your Purchase'** message sent to your buyers who have purchased through another agent.
- A regular **'Newsletter'** to every Category in your database.
- A response to the '**1300 tele-link'** prospecting leaflet
- Regular communications to **'Potential Sellers'**

These 'html Templates' usually have Ancillary Documents or Links that are attached to them. These links can be 'Static' i.e. they stay constant OR they can be 'Dynamic' i.e.they are constantly changing.
Suggestions for 'Static Links' are
- Your Mortgage Originator
- A choice of Solicitors
- A choice of recommended 'Furniture Removalists'
- A message about your 'Rental Department'
- 'Pre Settlement' check list
- Change-of-Address info

etc.

Suggestions for 'Dynamic Links' are

- 'Recently Sold Properties'
- 'Recently Leased Properties'
- 'New Listing Catalogue' from your Current Listings
- 'New Listing Catalogue' from your Shared Listings
- 'Current Buyers' lists

the 'Dynamic' links are '.pdf' files and need to be updated constantly so that your 'html' communication stays current.

Obviously it is much cheaper, simpler and more convenient if you can communicate the Bulk Message via email instead of printing and posting.

So, to manage the Bulk Messaging process via email you need to have 2 components

1. The 'html templates' (containing your Messages plus their Merge Fields)
2. The Ancillary Documents or Links.

BULK MESSAGING VIA EMAIL

The following email 'html templates' already found in Bulk Messaging and their purposes are

- **'Welcome to a New Property Seeker'** sent every day to all new buyers that register with your
- **'New Listing Catalog'** keeping your buyers up-to-date with New Listings and t
- **'Buyer Update'** sent monthly to all Buyers to update your database
- **'Congratulations on your Purchase'** sent to all buyers (even if they have purchased through
- **'Newsletter'** sent to every Contact in your database
- **'1300 tele-link'** sent to all people who respond to your '1300' leaflets
- **'Potential Sellers'** sent regularly to all Potential Sellers

these templates can be easily tailored to suit your company and your locality. Tailoring to your locality is important if you want your communications to be interesting. Centralised 'generic' messages are boring and do not get read!

Setting-up and Tailoring your email 'html Templates': (see Multilink Set-up & Installation)

Editing your HTML email templates

To open the templates and edit them

Start > Programs > Open Microsoft Front Page > file > open site > my computer > go to c:\multilink_frontpage_web > double click > single click on folder > open > navigation > open pages and edit > you will need to be shown how to edit the templates.

How To Create a 'Recently Sold .pdf Catalogue'

Proplink > Sales History > Search for Recently Sold Properties between dates that you specify > when the search is returned > hold the 'Ctrl' key down and click on to the properties you want in the report > Print > in the 'Which Properties' panel activate 'Selected' > In the 'Print Format' panel activate 'Catalog' in the 'Sort By' panel activate whichever 'radio box' you require > in the 'Custom Title' panel activate the tick box and type in 'Recent Sales' > Print > click the Printer Icon > activate 'Print to File' > in the 'Type' box scroll down and then select 'PDF File' > in the 'Where' box click the '...' button and locate the 'Email Links' folder > OK > insert the file name > Save > OK > Close > Exit

How To Create a 'Recently Leased .pdf Catalogue'

Login to Proplink using Renta status > Leaded History > Search for Recently Leased Properties between dates that you specify > when the search is returned > hold the 'Ctrl' key down and click on to the properties you want in the report > Print > in the 'Which Properties' panel activate 'Selected' > In the 'Print Format' panel activate 'Catalog' in the 'Sort By' panel activate whichever 'radio box' you require > in the 'Custom Title' panel activate the tick box and type in 'Recent Sales' > Print > click the Printer Icon > activate 'Print to File' > in the 'Type' box scroll down and then select 'PDF File' > in the 'Where' box click the '...' button and locate the 'Email Links' folder > OK > insert the file name > Save > OK > Close > Exit

To Create a 'New Listing .pdf Catalogue' from Current Listings
Proplink > Current Listings > Search for New Listings > when the search is returned > hold the 'Ctrl' key down and click on to the properties you want in the report > Print > in the 'Which Properties' panel activate 'Selected' > In the 'Print Format' panel activate 'Catalog' in the 'Sort By' panel activate whichever 'radio box' you require > in the 'Custom Title' panel activate the tick box and type in 'New Listings' > Print > click the Printer Icon > activate 'Print to File' > in the 'Type' box scroll down and then select 'PDF File' > in the 'Where' box click the '...' button and locate the 'Email Links' folder > OK > insert the file name > Save > OK > Close > Exit

To Create a 'Shared Listing .pdf Catalogue' from Shared Listings
Proplink > Shared Listings > Search for New Listings > when the search is returned > hold the 'Ctrl' key down and click on to the properties you want in the report > Print > in the 'Which Properties' panel activate 'Selected' > In the 'Print Format' panel activate 'Catalog' in the 'Sort By' panel activate whichever 'radio box' you require > in the 'Custom Title' panel activate the tick box and type in 'New Listings' > Print > click the Printer Icon > activate 'Print to File' > in the 'Type' box scroll down and then select 'PDF File' > in the 'Where' box click the '...' button and locate the 'Email Links' folder > OK > insert the file name > Save > OK > Close > Exit

To Create a 'Current Buyers .pdf List'
Proplink > Contacts > activate 'Buyers' insert a price range (buyers lists become extensive, so it is better to divide the Buyers List in to 3 or 4 different Price Ranges) > Search > when the search is returned > Print > click the Printer Icon > activate 'Print to File' > in the 'Type' box scroll down and then select 'PDF File' > in the 'Where' box click the '...' button and locate the 'Email Links' folder > OK > insert the file name > Save > OK > Close > Exit

The above .pdf files will be linked to your Email Templates.

To attach (link) the above .pdf 'Links' to your email 'HTML Principal Templates'
1. Create the .pdf file you require (see above)
2. Create an 'Email Link' address' for that file: to create this l'ink address' ->
Proplink > Maintenance > Attachments > Add > locate the 'Email Links' folder you created (see above) > select the .pdf file that you require > Open > check that the 'Email Link' file name appears on the 'Attachments' screen > Exit > Transfers > Transfer (this will send your 'Email Link' to the Internet and return an 'Internet Link Address' for that 'Link Document' to your local computer) > when Transfer is finished > Exit > Attachments > highlight the 'Link Document' name on the 'Attachments' screen > Get Link > highlight the 'Internet Link Address' > right click on mouse > copy > go to the Microsoft Front Page or Composer > go file->open site. browse to "My Documents"->"My Web Sites". single click on proplink_emails2. click open > click navigation tab at the bottom of window > open the Email Template .htm file you require > right click on to the 'click here' position that opens the link you want to edit > a right click menu will appear > Hyperlink Properties > in the Address Box replace the existing address with the new address copied from Proplink Attachments

This link will stay with this Email Template until you change it

BULK MESSAGING VIA PRINTED 'SURFACE MAIL'
You need to set-up 2 folders on your computer. The first folder named '**Merge Lists**' (contains the information you wish to merge into your templates e.g. the customer's names, addresses etc.) and the second folder named '**Templates**' (contains the message you wish to send to your customer base - into which your customers names, addresses etc. will be merged).

These 2 folders should reside in another folder called '**Bulk Messaging'**

If you are Bulk Messaging via printed 'Surface Mail' what is a 'linked' .pdf file in an email message must be printed separately and added to your mail-out envelope (if you wish to include it with your message).

How To Create a printed version of the 'Recently Sold Catalogue'
Proplink > Sales History > Search for Recently Sold Properties between dates that you specify > when the search is returned > hold the 'Ctrl' key down and click on to the properties you want in the report > Print > in the 'Which Properties' panel activate 'Selected' > In the 'Print Format' panel activate 'Catalog' in the 'Sort By' panel activate whichever 'radio box' you require > in the 'Custom Title' panel activate the tick box and type in 'Recent Sales' > Print > click the Printer Icon > select the printer and print the report.

How To Create a printed version of the 'New Listing Catalogue'
Proplink > Current Listings > Search for New Listings > when the search is returned > hold the 'Ctrl' key down and click on to the properties you want in the report > Print > in the 'Which Properties' panel activate 'Selected' > In the 'Print Format' panel activate 'Catalog' in the 'Sort By' panel activate whichever 'radio box' you require > in the 'Custom Title' panel activate the tick box and type in 'New Listings' > Print > click the Printer Icon > select the printer and print the report.

How To Create a printed version of the 'Shared Listing Catalogue'
Proplink > Shared Listings > Search for New Listings > when the search is returned > hold the 'Ctrl' key down and click on to the properties you want in the report > Print > in the 'Which Properties' panel activate 'Selected' > In the 'Print Format' panel activate 'Catalog' in the 'Sort By' panel activate whichever 'radio box' you require > in the 'Custom Title' panel activate the tick box and type in 'New Listings' > Print > click the Printer Icon > select the printer and print the report.

How To Create a printed 'Current Buyers List'
Proplink > Contacts > activate 'Buyers' insert a price range (buyers lists become extensive, so it is better to divide the Buyers List in to 3 or 4 different Price Ranges) > Search > when the search is returned > Print > click the Printer Icon > select the printer and print the report.

How To create a 'Merge List' to insert into your printed documents.
Bulk Messaging > Search > insert your search criteria > Search > when search results are returned > Export To Merge File > Select > locate 'Merge Lists' > insert 'File name' > Save > Start Export > OK > close Bulk Messaging program.

How To create Templates for printing
Open Microsoft Word > type the message you wish to send to: a) a New Buyer: b) Your Buyer Database (containing your New Listing Catalog): c) A Buyer who has Purchased through another agent: etc.> Save each Message in your 'Templates' folder. How-to's and tips
Mail merge 101. go to <http://go.microsoft.com/?linkid=1082896>
It's easier than you think to use the mail merge features in the Microsoft Office System. See how to send letters, newsletters, and faxes, and to make labels and envelopes for up to thousands of addresses at a time.

1.2.1 Updating Email Links

Click on to 'Buyer Lists' ; 'New Listings Catalogue' ; 'Recent Sales Catalogue' ; opposite

1.2.1.1 Buyer Lists

'Buyer-Lists' are
1. Linked into the emails you send to Potential Sellers.
2. Printed an attached to documents you send by 'surface mail' to Potential Sellers

To create your 'Buyer-Lists'
It is better to create 'Buyer Lists' in 3 different price ranges and separately link each 'Buyer List' to your Email Template rather than creating just the one large Buyer-List

Proplink > Contacts > tick 'Buyers' > Search > Print > activate 'All Potential Customers' > insert a Price Range in the 'Customers Price Range From' box > activate 'Price' in 'Sort by' > Print > click the 'Printer Icon' > activate ''Print to File' > locate 'PDF File' in the 'Type' box > locate the 'Buyer Lists' report and Save it into the 'Where' box (C:/Proplink > Email_Templates > '.pdf_LInks' folder > and save as 'Buyer Lists'.pdf file) > OK

To link the 'Buyer Lists' to your Email Template
1. Create the Link
Proplink > Maintenance > Attachments > Add > locate 'Buyer Lists' (C:/Proplink > Email_Templates > '.pdf_LInks' folder > 'Buyer Lists'.pdf file) > Click onto the Buyer List required > Open > the file will be placed in the Attachments screen (the 'tick box' in the row next to the new attachment will be empty) > Exit > Transfers > Transfer
When the Transfer is complete > Exit transfer > re-enter Attachments > Highlight the 'Buyers List' you require > (the 'tick box' will now be ticked) signifying that it has received an 'Internet Address' from the Transfer.

2. Prepare the appropriate Email Template to receive the new 'Buyer Lists' link
Go to the Microsoft Front Page or Composer > go file->open site. browse to "My Documents"->"My Web Sites". single click on proplink_emails2. click open > click navigation tab at the bottom of window > open the Email Template .htm file you require > right click on to the 'click here' position that opens the link you want to edit > a right click menu will appear > Hyperlink Properties > in the Address Box replace the existing address with the new address copied from Proplink Attachments (see below)

3. Insert the new Link into your Email Template
In Proplink > Maintenance > Attachments > Highlight the 'Buyers List' you require > Get Link > in the dialog box that appears highlight the Link Address and Copy it (Ctrl/C) > Alt/Tab to the Email Template in Microsoft Front Page or Composer > right click on to the position you want to insert the new Link > a right click menu will appear > select Hyperlink > In the 'Text to display' box > type-in the words 'click here' > in the 'Address' box > Paste the new Link (Cntrl/V) > the long Internet Link Address will appear > OK
The new 'click here' will now relate to the updated Link and its contents

To test the New Link > hold the 'Cntrl' key down and click on to the 'click here' - It should take you to the new link.Save your work

1.2.1.2 New Listings Catalogue

'**New Listing Catalogs**' are Linked into the weekly emails you Bulk-Send to Buyers. These Weekly Catalogs can be for your own 'Current Listings' and for your 'Shared Listings'.

To create your 'Weekly Catalogs'

New 'Current Listings' Catalogue
Proplink > Current Listings > Search > Date From (1 week prior) > date To (today) > Search > Print > in 'Which Properties' activate 'All' > in 'Print Format' activate 'catalog' > in 'Sort By' activate 'Price' > in 'Custom Title' activate the 'tick box' and type 'New Listings' > Print > click the 'Printer Icon' > activate ''Print to File' > locate 'PDF File' in the 'Type' box > locate the 'New Current Listings Catalogue' report and Save it into the 'Where' box (Proplink > Email_Templates > '.pdf_Links' folder > New Listings Catalogs > Save > OK > Close > Exit > Exit

New 'Shared Listings' Catalogue
Proplink > Shared Listings > Search > Date From (1 week prior) > date To (today) > Search > hold the 'Ctrl' key down and click on to those Shared Listings you wish to include in the report > Print > in

'Which Properties' activate 'Selected' > in 'Print Format' activate 'Catalog' > in 'Sort By' activate 'Price' > in 'Custom Title' activate the 'tick box' and type 'New Listings' > Print > click the 'Printer Icon' > activate "Print to File' > locate 'PDF File' in the 'Type' box > locate the 'New Shared Listings Catalogue' report and Save it into the 'Where' box (Proplink > Email_Templates > '.pdf_Links' folder > New Shared Listings Catalogs.pdf) > Save > OK > Close > Exit > Exit

To link the 'New Listing Catalogs' to your Email Template
1. Create the Link
Proplink > Maintenance > Attachments > Add > locate 'New Listings Catalogs' .pdf file or the 'New Shared Listings Catalogs'.pdf file > Click onto the New Listings Catalogue required > Open > that file will be returned to the 'Attachments' screen (the 'tick box' of the new attachment will be empty) > Exit > Transfers > Transfer
When the Transfer is complete > Exit transfers > re-enter Attachments > Highlight the 'New Current Listings.pdf' or 'New Shared Listings.pdf' you require > (the 'tick box' will now be ticked)

2. Prepare the appropriate Email Template to receive the new 'New Listings Catalogs' link
Go to the Microsoft Front Page or Composer > go file->open site. browse to "My Documents"->"My Web Sites". single click on proplink_emails2. click open > click navigation tab at the bottom of window > open the Email Template .htm file you require > right click on to the 'click here' position that opens the link you want to edit > a right click menu will appear > Hyperlink Properties > in the Address Box replace the existing address with the new address copied from Proplink Attachments (see below)

3. Insert the new Link into your Email Template
In Proplink > Maintenance > Attachments > Highlight the 'New Listings Catalog' you require > Get Link > in the dialog box that appears highlight the Link Address and Copy it (Ctrl/C) > Alt/Tab to the Email Template in Microsoft Front Page or Composer > right click on to the position you want to insert the new Link > a right click menu will appear > select Hyperlink > In the 'Text to display' box > type-in the words 'click here' > in the 'Address' box > Paste the new Link (Cntrl/V) > the long Internet Link Address will appear > OK
The new 'click here' will now relate to the updated Link and its contents

To test the New Link > hold the 'Cntrl' key down and click on to the 'click here' - It should take you to the new link.Save your work

1.2.1.3 Recent Sales Catalogue

'**Recent Sales Catalogue**' This .pdf file is Linked into the '1300 Responder' template and in to the 'Welcome to a 'New Buyer' template and is updated Monthly.

To create your 'Recent Sales Catalogue' .pdf

Proplink > Sales History > Search > Date From (1 month prior) > date To (today) > Search > hold the 'Ctrl' key down and click on to those Sales History properties you wish to include in the report (there are 24 properties per page) > Print > in 'Which Properties' activate 'Selected' > in 'Print Format' activate 'Catalog' > in 'Sort By' activate 'Price' > in 'Custom Title' activate the 'tick box' and type 'Recent Sales' > Print > click the 'Printer Icon' > activate "Print to File' > locate 'PDF File' in the 'Type' box > locate the 'Recent Sales' report and Save it into the 'Where' box (C:/Proplink > Email_Templates > '.pdf_LInks' folder > and save as 'Recent Sales Catalog' .pdf file > Save > OK > Close > Exit > Exit

To link the 'Recent sales catalogue' .pdf to your Email Template
1. Create the Link
Proplink > Maintenance > Attachments > Add > locate 'Recent Sales.pdf file > Open > that file will be returned to the 'Attachments' screen (the 'tick box' of the new attachment will be empty) > Exit > Transfers > Transfer

When the Transfer is complete > Exit transfers > re-enter Attachments > Highlight the 'Recent Sales.pdf' you require > (the 'tick box' will now be ticked)

2. Prepare the appropriate Email Templates to receive the new 'Recent Sales Catalogue' link
Go to the Microsoft Front Page or Composer > go file->open site. browse to "My Documents"->"My Web Sites". single click on proplink_emails2. click open > click navigation tab at the bottom of window > open the Email Template .htm file you require > right click on to the 'click here' position that opens the link you want to edit > a right click menu will appear > Hyperlink Properties > in the Address Box replace the existing address with the new address copied from Proplink Attachments (see below)

3. Insert the new Link into your Email Template
In Proplink > Maintenance > Attachments > Highlight the 'Recent Sales Catalog' you require > Get Link > in the dialog box that appears highlight the Link Address and Copy it (Ctrl/C) > Alt/Tab to the Email Template in Microsoft Front Page or Composer > right click on to the position you want to insert the new Link > a right click menu will appear > select Hyperlink > In the 'Text to display' box > type-in the words 'click here' > in the 'Address' box > Paste the new Link (Ctrl/V) > the long Internet Link Address will appear > OK
The new 'click here' will now relate to the updated Link and its contents

To test the New Link > hold the 'Ctrl' key down and click on to the 'click here' - It should take you to the new link. Save your work

Alt/Tab to Proplink > highlight the 'Recent Sales.pdf you require > Get Link > highlight the Link Address and Copy it (Ctrl/C) > Alt/Tab to the '1300 Response' or the 'Welcome to a new Preferential Buyer.doc' Template > click on to the position you want to insert the new Link > Paste the new Link (Ctrl/V) > the long Internet Link Address will appear > Highlight this New Address > right click on mouse > Hyperlink (or Edit Hyperlink) > in the 'Text to Display' box delete the existing long address and type in the words 'click here' > OK
The new 'click here' will now relate to the updated Link

To test the New Link > hold the 'Ctrl' key down and click on to the 'click here' - It should take you to the new link. Save your work
Links

1.3 Managing Buyers

Every day 'New Buyers' that register with your company during that day, need to be welcomed.
1. Bulk Messaging > Contacts > Search > activate 'Buyer' > In 'First Contacted From' box insert date > In 'First Contacted To' box insert date > Search > A List is returned > 'Export to Merge File' > 'Select' > Proplink > Bin > Bulk Messaging > Merge Lists > Buyers Welcome - daily > overwrite existing 'Buyers'.xls file . Save. The Merge File name now appears in the 'Destination File' box > 'Start Export' > OK > Close and also close the 'Bulk Messaging' program

2. Open Microsoft Word > Tools > Letters and Mailings > Mail Merge > activate 'E-mail messages' > 'Next - Starting Document' > activate 'Start from existing document' > Open 'More Files' > go to Proplink > Bin > Bulk Messaging > Templates > Emails > open 'Real Estate Gallery welcomes a new Preferential Buyer.doc' > No > activate 'Use the current document' > Next: select recipients > activate 'Use an existing list' > Browse > locate merge file in Proplink > Bin > Bulk Messaging > Merge lists > Buyers Welcome - daily > double click Buyers.xls > OK > OK > Next: Write your email message > Next: Preview your email message > Next: Complete the merge > Electronic Mail > In 'Subject Line' > insert " (Your Agency Name) welcomes a Preferential Buyer. Close the document and don't save it.

Every week 'Existing Buyers' need to be sent a New Listing Catalogue
1. Bulk Messaging > Contacts > Search > activate 'Buyer' > Tick 'Email' in the "Restrict search to records that have an" box > Tick 'Buyer' in the "Restrict search to these categories" box > Search > A List is returned > 'Export to Merge File' > 'Select' > Proplink > Bin > Bulk Messaging > Merge Lists >

Buyers EMagazine Weekly > overwrite existing 'All Buyers'.xls file . Save. The Merge File name now appears in the 'Destination File' box > 'Start Export' > OK > Close and also close the 'Bulk Messaging' program

2. Open Microsoft Word > Tools > Letters and Mailings > Mail Merge > activate 'E-mail messages' > 'Next - Starting Document' > activate 'Start from existing document' > Open 'More Files' > go to Proplink > Bin > Bulk Messaging > Templates > Emails > open 'New Listings.doc' > No > activate 'Use the current document' > Next: select recipients > activate 'Use an existing list' > Browse > locate merge file in Proplink > Bin > Bulk Messaging > Merge lists > Buyers EMagazine Weekly > double click All Buyers.xls > OK > OK > Next: Write your email message > Next: Preview your email message > Next: Complete the merge > Electronic Mail > In 'Subject Line' > insert " (Your Agency Name) New Listings. Close the document and don't save it.

Once a Fortnight buyers that have "Purchased through another Agent' need to be contacted
1. Bulk Messaging > Contacts > Search > activate 'Buyer' > Tick 'Email' in the "Restrict search to records that have an" box > Tick 'Bought via other agency' in the "Restrict search to these categories" box > Search > A List is returned > 'Export to Merge File' > 'Select' > Proplink > Bin > Bulk Messaging > Merge Lists > Bought via other agency - weekly > overwrite existing 'External Purchaser.xls' file > Save. The Merge File name now appears in the 'Destination File' box > 'Start Export' > OK > Close and also close the 'Bulk Messaging' program

2. Open Microsoft Word > Tools > Letters and Mailings > Mail Merge > activate 'E-mail messages' > 'Next - Starting Document' > activate 'Start from existing document' > Open 'More Files' > go to Proplink > Bin > Bulk Messaging > Templates > Emails > open 'Congratulations on your real estate purchase.doc' > No > activate 'Use the current document' > Next: select recipients > activate 'Use an existing list' > Browse > locate merge file in Proplink > Bin > Bulk Messaging > Merge lists > Bought via other agency - weekly > double click 'External Purchaser.xls' > OK > OK > Next: Write your email message > Next: Preview your email message > Next: Complete the merge > Electronic Mail > In 'Subject Line' > insert "Congratulations on your real estate purchase". Close the document and don't save it.

1.4 Managing Current Listings

After a new listing has been entered into Proplink it should then be imported into 'Scheduler' and assigned the sequence of pre-determined tasks designated by your company.

Such tasks will vary from company to company but may be similar to the following:
VENDORS SOLICITORS INSTRUCTED
Take PHOTOGRAPHS and attach to property details in Proplink
Post property information and Photographs on the INTERNET
Distribute property to ALLIANCE OFFICES< RELOCATION COMPANIES< INVESTMENT ADVISERS
ADVERTISING SCHEDULE prepared and inserted into Advertising Manager
ADVERTISING COPY written for Board, Brochures, Daily Paper, Local Paper, Window Display
WELCOME LETTER and ADVERTISING SCHEDULE sent to Vendor
DISPLAY ADVERTISING BOOKED on Weekly Advertising Boards
FOR SALE BOARD ordered
SKETCH & FLOOR PLAN ORDER
Send Buyers in database SMS MESSAGE and/or EMAIL of the New Listing
BROCHURES and COMPANY MAGAZINE adds ordered
POINTER BOARD "REQUESTS" delivered
EDITORIAL submitted to all the newspapers
COMPANY MAGAZINE adds ordered
Q.A.M LETTER with HOMEBOOK PREPARATORY LETTER
KEY SAFE installed at property
JUST LISTED NEIGHBOUR letters delivered
POINTER BOARDS ERECTED
POINTER BOARD "THANK YOU" letters delivered
HOMEBOOK prepared
OFI UPDATE Inform Seller of weekend OFI times
PROPERTY ACTIVITY REPORT week 1
OFI UPDATE Inform Seller of weekend OFI times
PROPERTY ACTIVITY REPORT week 2
OFI UPDATE Inform Seller of weekend OFI times
PROPERTY ACTIVITY REPORT week 3
AUCTION INVITATIONS sent
Pre Auction VENDOR MEETING
OFI UPDATE Inform Seller of weekend OFI times
Pre Auction "BEST WISHES LETTER"
PROPERTY ACTIVITY REPORT week 4
Managing Director "30 DAY LETTER"
PASSED-IN LETTER (if required) the Monday after the Auction
OFI UPDATE Inform Seller of weekend OFI times
PROPERTY ACTIVITY REPORT week 5

Instructions on how to perform all of the above tasks are explained by double clicking on to 'Managing Current Listings' in the Table of Contents on the left side of this screen.

Whenever you have completed one of the above tasks always inform 'Scheduler' as follows

Login to **Scheduler** > **Master Tasks** > insert the Dates > the Master-In-Process form will display "**Current Listing Addresses**" and the tasks that are required to be done. When that task has been completed you must click **'Done'** and insert the date the task was done. This action creates a log. If the task needs to be rescheduled click **'Rescheduled'** and insert the rescheduled date.

1.4.1 Managing Photos in Proplink

Photos can be either downloaded into Proplink from a Digital Camera, Scanned from Prints or downloaded from you Professional Photographer

1. Downloading Photos

Set up a Folder to receive photos from camera
Start > **Programs** > **Windows Explorer** > suggest C or D:**Photos**

In the **Photos** folder each time you download a new set of photos it is a good idea to open a new 'sub folder' and name it after the property address (Street name first and then the street number) > this way you create a 'Photos Directory' containing the original photos of every property. It is now easy to copy these photos from the property address 'sub folder' into Proplink.

When all of the photos have been successfully downloaded from the Camera and you are happy that they are all on your Hard Disc

Delete the Photos from Camera
Once you have downloaded the photos into the Photo sub folder and have process them in Proplink and have attached them to a property you should delete the photos in the camera. Depending on the camera software this process is usually > View > Select all > hit the Delete Button on Keyboard > wait till all photos disappear

Download the photos from a Digital Camera or a Scanner directly into this Photo Directory

Downloading photos from a Professional Photographer or a Graphics House

The size of 'High Resolution' photos make them very difficult to transfer electronically. Your Graphic House or Photographer can make smaller .jpg files of all of the photographs they have taken and load them onto the Multilink Server. The next time you do a Transfer these photographs will be received in the Proplink 'Received Pool'. You can view these 'proofs' and select the ones you want the Graphics House to use on For Sale Boards, Brochures etc (see 'Ordering from Suppliers' chapter). These .jpg 'proofs' can then be kept and attached to the property information in Proplink and sent to the Internet and your other Strategic Alliances
To view these photos received from your Graphic House or Photographer in Proplink
Login to **Proplink** > **Current Listings** > search for the property > **Details** > **Pictures** > **Pool** > **Received** > **Cut** > select which one of the 9 'photo boxes' you want that photo to appear by clicking on to it > **Paste** > Give the photo a name > **OK**

2. Move photos from the 'Property Folder' into Proplink

Go to the sub folder for the property address and copy the photos you have downloaded from the camera > Go to **Windows Explorer** > **Proplink** > **Photobin** and paste
(if the Multilink 'Photo Manager' shortcut folder has been added to your 'Multilink Systems' menu - that is attached to the Microsoft Task Bar > click Start > Multilink Systems > Photo Manager > Photobin > Paste).

The photos are now in Proplink. The next step is to process them.

In Proplink Main Menu > **Maintenance** > **Load Pictures** > **Pictures Automatic**
(if the 'Load Pictures' shortcut has also been added to your Multilink Systems menu - that is attached to the Microsoft Task Bar then click Start > Multilink Systems > Photo Manager > Load Pictures > Pictures Automatic.

The photos are now in the Picture Pool waiting to be attached to a property.

3) Attach the Photos to a property

In **Proplink** locate the property into which you want to paste the photos > **Current Listings** or **Potential Vendors** or **Sales History** > highlight the property to which you want to attach the photos by clicking on to it > **Details** > **Pictures** > **Pool** > **Office** > select the photo you require by clicking onto it > **Cut** > nominate (by clicking onto it) which one of the 9 boxes on the returned screen you wish the photo to be located > **Paste** > insert the name of the photo e.g. Facade, Living etc. > repeat the exercise for the remaining photos.

4) Photos attached to the wrong Property

If you have incorrectly attached photos to a wrong property and have not yet 'saved' the photos against that wrong property > **Exit** > a dialog box will appear "Quit without saving?" > **Yes**

If you have already saved the photos against the wrong property then you will need to go into that property and individually remove them as follows:
In **Proplink** > click onto the property > **Details** > **Pictures** > click on to the incorrect photo > **Cut**
This will automatically create two files in the Proplink > 'Temp' directory
If you want to use the photos again
You will need to send these photos through the Proplink Process again to get the photos back into the Proplink Photopool
On the Microsoft Task Bar > **Start** > **Windows Explorer** > **Proplink** > Double Click **'Temp'** Folder > the system creates 2 images for every photo. One is a jpg and one is a bmp.
The 2 files named 'Copy Temp.jpg' and 'Copy Temp.BMP' are the two photos that you have cut
Click on to 'Copy Temp.jpg' and copy it. Then open **Proplink** > **Photobin** folder and **paste** the Copy Temp.jpg file > return to the property in Proplink and cut the next photo > in Proplink 'Temp' folder copy the 'Copy Temp.jpg' photo > paste it in Photobin (you may have to rename it or it might over write the previous photo)
Redo the **Load Photos** routine in Maintenance
The photos are now in Photopool ready for you to attach it to the correct property

1.4.2 Vendors Solicitors Instructed

Pre Sale
Login to **Current Listings >** highlight the property you require **> 'Tasks' > Pre Sale Activities> Solicitors Instructions > Design > Preview >** Check the letter is correct and all of the merge fields have been returned **> Print** document**.**

Whenever you have completed the above task always inform **'Scheduler'** as follows
Login to **Scheduler** > **Master Tasks** > insert the Dates > the Master-In-Process form will display "**Current Listing Addresses**" and the tasks that are required to be done. When that task has been completed you must click **'Done'** and insert the date the task was done. This action creates a log. If the task needs to be rescheduled click **'Rescheduled'** and insert the rescheduled date.

1.4.3 Attaching a Floor Plan to a property

Login to **Proplink** > **Current Listings** > Search for the property > **Details** > **Attachments** > **Attach** > locate the file you require > **Open**

1.4.4 Attach a Vendor's Statement to a property

In Victoria the Government require a Vendor's Statement or Section 32 to be signed by a Purchaser prior to paying a deposit.

Scan the document and create a .pdf file and save it to your Hard Disc. The maximum size allowed for this .pdf file is 400k (large Vendor Statements need to be broken down into several smaller .pdf files)

Login to **Proplink** > **Current Listings** > Search for the property > **Details** > **Attachments** > **Attach** >

locate the file you require > **Open**

1.4.5 Posting information on the Internet

Login to **Proplink** > **Current Listings** > **Details** > **Sharing** > Check that the **Distributor** column displays all of the Internet Sites you want to publish your listing > close **Current Listings** > **Maintenance** > **Transfers** > **Transfer**

The **Transfer** can be done after you have also nominated the **Strategic Alliance** offices you wish to receive your listing

1.4.6 Distribute property to Alliances

Login to **Proplink** > **Current Listings** > **Details** > **Sharing** > Check that the **Alliances** column displays all of the Alliance Offices you want to receive your listing > close **Current Listings** > **Maintenance** > **Transfers** > **Transfer**

The **Transfer** can be done after you have also nominated the **Internet Sites** you wish to publish your listing

1.4.7 Prepare Advertising-Schedule

Login to **Advertising Manager** > To log in user must be a 'Super User' > **Advertising Manager** > **Import** [imports the New Listing] into Advertising Manager > Select the property you wish to import by clicking onto it > **Done**

If all the fields for the imported property are not completed at the time of Importing the record the missing fields can be included manually by clicking the **Details** button on the Advertising Management screen.

After Importing the Property Information > **Media** button > **Import** a 'Standard Schedule' or manually create your own.

All expenditure that is not Media is classed as 'Other'. To add 'Other Expenses' to the advertising schedule click the **Other** button on the Advertising Management screen and import those Other expenses as appropriate.

If there has been any 'Pre Payment' of advertising click on to the 'Pre Paid' button then insert the Amount and Date.

1.4.8 Send Welcome-Letter & Advertising-Schedule to Vendor

Login to **Current Listings >** select a property - by clicking on to it **> Tasks > Pre-Sale > "Welcome Letter" > Print or Display > Preview >** Check the letter is correct and all of the merge fields have been returned **> Print** document**.**

To print Advertising Schedule
Login to **Advertising Manager** > Select the property address by clicking on to it > **Print** > **Print Schedule** > **Preview** > if happy with preview > **Print** icon

Whenever you have completed the above task always inform **'Scheduler'** as follows
Login to **Scheduler** > **Master Tasks** > insert the Dates > the Master-In-Process form will display "**Current Listing Addresses**" and the tasks that are required to be done. When that task has been completed you must click **'Done'** and insert the date the task was done. This action creates a log. If

the task needs to be rescheduled click **'Rescheduled'** and insert the rescheduled date.

1.4.9 Advertising-Copy collected

ADVERTISING COPY written for Board, Brochures, Daily Paper, Local Paper, Window Display

1.4.10 Diaplay-Advertising booked

Login to **Design Studio** > Select the **Medium** [Local Paper, Company Magazine, Brochure, Window Display, Daily Newspaper] > Select the **Date of Insertion** > either "Reserve" the space in the Template or insert the "Advertisement" ready to send to Publisher.

1.4.11 For-Sale Board, Sketch & Floor Plan, Brochures ordered

Login to **Proplink** > **Current Listings** > Select the property > **Orders** > **Add** > select For Sale Board or Sketch or Floor Plan or Brochures [complete the instructions] > **OK** > Select the **Supplier** > **OK**.

These instructions will be sent the next time you do a **Transfer**.

Whenever you have completed the above task always inform **'Scheduler'** as follows
Login to **Scheduler** > **Master Tasks** > insert the Dates > the Master-In-Process form will display "**Current Listing Addresses**" and the tasks that are required to be done. When that task has been completed you must click **'Done'** and insert the date the task was done. This action creates a log. If the task needs to be rescheduled click **'Rescheduled'** and insert the rescheduled date.

1.4.12 Pointer-Board request

Login to **Current Listings >** highlight the property you require Pointer Boards for **> Tasks > Pre-Sale Activities > "Pointer Board" requests" > Design > Preview >** Check the letter is correct and all of the merge fields have been returned **> Print** document**.**

24 Hours after "Pointer-Board request' - contact your Pointer Board erector and specify property addresses on to which they can erect Pointer Boards. Insert these addresses against the property in Proplink

Login to **Proplink** > **Current Listings** > Search for property > **Details** > **Vendor** > **Vendor Notes** = insert addresses for Pointer Boards

Whenever you have completed the above task always inform **'Scheduler'** as follows
Login to **Scheduler** > **Master Tasks** > insert the Dates > the Master-In-Process form will display "**Current Listing Addresses**" and the tasks that are required to be done. When that task has been completed you must click **'Done'** and insert the date the task was done. This action creates a log. If the task needs to be rescheduled click **'Rescheduled'** and insert the rescheduled date.

1.4.13 Editorial submitted

Submit editorial to Daily and Local Newspapers
Login to **Current Listings >** highlight the property you require an Editorial for **> Details > Additional Copy > Add >** under 'Copy Name' select **Edirorial1 >** insert Editorial Copy **> OK > Exit > Save > Exit > Tasks > Pre Sale Activities > Editorial Copy > Design > Preview >** Check the Editorial is correct and all of the merge fields have been returned **> Print** document**.**

Whenever you have completed the above task always inform **'Scheduler'** as follows
Login to **Scheduler** > **Master Tasks** > insert the Dates > the Master-In-Process form will display "**Current Listing Addresses**" and the tasks that are required to be done. When that task has been completed you must click **'Done'** and insert the date the task was done. This action creates a log. If the task needs to be rescheduled click **'Rescheduled'** and insert the rescheduled date.

1.4.14 Q.A.M- Letter with Homebook Preparatory Letter

Login to **Current Listings >** highlight the property you require QAM Letter for **> Tasks > Pre-Sale Activities > Preparing Homebook letter > Design > Preview >** Check the letter is correct and all of the merge fields have been returned **> Print** document**.**

Whenever you have completed the above task always inform **'Scheduler'** as follows
Login to **Scheduler** > **Master Tasks** > insert the Dates > the Master-In-Process form will display "**Current Listing Addresses**" and the tasks that are required to be done. When that task has been completed you must click **'Done'** and insert the date the task was done. This action creates a log. If the task needs to be rescheduled click **'Rescheduled'** and insert the rescheduled date.

1.4.15 Install Key-Safe

Login to **Proplink** > **Current Listings** > **Details** > **Inspection** > Insert Key-Safe number

Whenever you have completed the above task always inform **'Scheduler'** as follows
Login to **Scheduler** > **Master Tasks** > insert the Dates > the Master-In-Process form will display "**Current Listing Addresses**" and the tasks that are required to be done. When that task has been completed you must click **'Done'** and insert the date the task was done. This action creates a log. If the task needs to be rescheduled click **'Rescheduled'** and insert the rescheduled date.

1.4.16 Just-Listed-Neighbour letters

Login to **Current Listings >** highlight the property you require the 'Just Listed Neighbour Letter' to represent **> Tasks > Pre-Sale Activities > Just Listed Neighbour Letter > Design > Preview >** Check the letter is correct and all of the merge fields have been returned **> Print** document**.**

Whenever you have completed the above task always inform **'Scheduler'** as follows
Login to **Scheduler** > **Master Tasks** > insert the Dates > the Master-In-Process form will display "**Current Listing Addresses**" and the tasks that are required to be done. When that task has been completed you must click **'Done'** and insert the date the task was done. This action creates a log. If the task needs to be rescheduled click **'Rescheduled'** and insert the rescheduled date.

1.4.17 Pointer Board "Thank You" letters

Login to **Current Listings >** highlight the property you require the 'Pointer Board - thank you letter' to represent **> Tasks > Pre-Sale Activities > 'Pointer Board' thank you letter > Design > Preview >** Check the letter is correct and all of the merge fields have been returned **> Print** document**.**

Whenever you have completed the above task always inform **'Scheduler'** as follows
Login to **Scheduler** > **Master Tasks** > insert the Dates > the Master-In-Process form will display "**Current Listing Addresses**" and the tasks that are required to be done. When that task has been completed you must click **'Done'** and insert the date the task was done. This action creates a log. If the task needs to be rescheduled click **'Rescheduled'** and insert the rescheduled date.

1.4.18 Prepare Homebook

Login to **Current Listings >** highlight the property you require the 'Homebook' to represent **> Tasks > Pre-Sale Activities > Homebook > Design > Preview >** Check the document is correct and all of the merge fields have been returned **> Print** document**.**

Whenever you have completed the above task always inform **'Scheduler'** as follows
Login to **Scheduler** > **Master Tasks** > insert the Dates > the Master-In-Process form will display "**Current Listing Addresses**" and the tasks that are required to be done. When that task has been completed you must click **'Done'** and insert the date the task was done. This action creates a log. If the task needs to be rescheduled click **'Rescheduled'** and insert the rescheduled date.

1.4.19 OFI Updates-Inform Seller of weekend OFI times

Login to **Proplink** > **Current Listings** > Select a property by clicking on to it > **Details** > **Inspection** > **OFI Times** > Insert OFI Times > **Save** > **Print** > in '**Which Properties**' frame activate **'OFI'** and in '**Print Format**' frame activate '**OFI Report**' > **Print**

1.4.20 Property-Activity Reports

Every Tuesday every Vendor should be sent a Property Activity Report covering all of the activity on their property for the previous week. Each report should be accompanied by the corresponding weekly 'Cover Letter'

Property Activity 'Cover Letter"
Login to **Current Listings >** highlight the property you require the 'Activity Report cover letter' to represent **> Tasks > Pre-Sale Activities > Select the Activity Report Week number > Design > Preview >** Check the letter is correct and all of the merge fields have been returned **> Print** document**.**

Property Activity
Login to **Proplink > Current Listings >** highlight the property you require the 'Activity Report' for **> Activity > Print >** in the Print Preview screen **> Print** icon **>** if printing a hard copy select the printer and print or if you wish to attach the Activity Report to an email activate **'Print to File'** and in **'Type'** select **pdf file** and in **'Where'** browse to a folder that you have previously created called Activity Reports. Each Activity Report in this folder should be filed by Address and Date **> OK.** When you have completed your overview in your email attach this pdf file from your Activity Reports folder

Whenever you have completed the above task always inform **'Scheduler'** as follows
Login to **Scheduler** > **Master Tasks** > insert the Dates > the Master-In-Process form will display "**Current Listing Addresses**" and the tasks that are required to be done. When that task has been completed you must click **'Done'** and insert the date the task was done. This action creates a log. If the task needs to be rescheduled click **'Rescheduled'** and insert the rescheduled date.

1.4.21 Auction-Invitations

Login to **Current Listings >** highlight the property you require the 'Auction Invitations' to represent **> Tasks > Pre-Sale Activities > Auction Invitation letter > Design > Preview >** Check the document is correct and all of the merge fields have been returned **> Print** document**.**

Whenever you have completed the above task always inform **'Scheduler'** as follows
Login to **Scheduler** > **Master Tasks** > insert the Dates > the Master-In-Process form will display "**Current Listing Addresses**" and the tasks that are required to be done. When that task has been completed you must click **'Done'** and insert the date the task was done. This action creates a log. If the task needs to be rescheduled click **'Rescheduled'** and insert the rescheduled date.

1.4.22 Best-Wishes letter

Login to **Current Listings >** highlight the property you require the 'Best Wishes letter' to represent **> Tasks > Pre-Sale Activities > Auction 'Best Wishes' letter > Design > Preview >** Check the document is correct and all of the merge fields have been returned **> Print** document**.**

Whenever you have completed the above task always inform **'Scheduler'** as follows
Login to **Scheduler** > **Master Tasks** > insert the Dates > the Master-In-Process form will display "**Current Listing Addresses**" and the tasks that are required to be done. When that task has been completed you must click **'Done'** and insert the date the task was done. This action creates a log. If the task needs to be rescheduled click **'Rescheduled'** and insert the rescheduled date.

1.4.23 Passed-in letter - if required

Login to **Current Listings >** highlight the property you require the 'Passed-in letter' to represent **> Tasks > Pre-Sale Activities > Auction 'Passed-in' letter > Design > Preview >** Check the document is correct and all of the merge fields have been returned **> Print** document**.**

Whenever you have completed the above task always inform **'Scheduler'** as follows
Login to **Scheduler** > **Master Tasks** > insert the Dates > the Master-In-Process form will display "**Current Listing Addresses**" and the tasks that are required to be done. When that task has been completed you must click **'Done'** and insert the date the task was done. This action creates a log. If the task needs to be rescheduled click **'Rescheduled'** and insert the rescheduled date.

1.5 Managing the After Exchange-Pre Settlement

When an offer has been accepted and Contracts have been Exchanged between a Purchaser and a Vendor the file should be imported into 'Scheduler' and assigned the sequence of pre-determined tasks designated by your company. The Settlement Date in 'Scheduler' should be adjusted to co-inside with the date on the sales file

Such tasks will vary from company to company but may be similar to the following:
ISSUE RECEIPT and BANK DEPOSIT
REMOVE PROPERTY INFO from Current Listings
CLOSE-OFF ADVERTISING
INSERT COMMISSIONS
Sign off 'IN-PROCESS' Pre Sale
JUST SOLD - Vendors kit
VENDORS SOLICITOR INSTRUCTED
PURCHASERS SOLICITOR INSTRUCTED
JUST PURCHASED - Purchasers kit
JUST SOLD - Neighbours letter
REMOVE KEY
POINTER BOARDS - Thank you letter
REMOVE POINTER BOARDS
BALANCE OF DEPOSIT is due
REMOVE FOR SALE BOARD
ACCOUNT SALES SENT
HOUSEHOLD INVENTORY BOOKLET prepared and delivered
QUESTIONNAIRE to vendor
INTRODUCING NEW NEIGHBOURS letter
Settlement Day Gift
AFTER SETTLEMENT letter and QUESTIONNAIRE to purchaser
Set up SALES HISTORY activity

Instructions on how to perform all of the above tasks are explained by double clicking on to 'Managing the After Exchange-Pre Settlement' heading in the Table of Contents on the left side of this screen

Whenever you have completed any of the above tasks always inform **'Scheduler'** as follows
Login to **Scheduler** > **Master Tasks** > insert the Dates > the Master-In-Process form will display "**Current Listing Addresses**" and the tasks that are required to be done. When that task has been completed you must click **'Done'** and insert the date the task was done. This action creates a log. If the task needs to be rescheduled click **'Rescheduled'** and insert the rescheduled date.

1.5.1 Issue Receipt and Open Trust Ledger

Login to **Money** [must be a 'Super User'] > **Trust Account** > **New** > Insert the Date [click on to the icon] > in the next column click on to the 'drop-down-box' and select 'Credit' [insert the Receipt Number > in the next column insert the names of the Purchasers > in the 'Deposit' column insert the amount of the deposit > 'Double Click' where it says 'Double Click' > in the 'New' box insert the property address > in the next Memo column Double Click and select the Done

All subsequent receipts will remember the previous receipt number

1.5.2 Remove property from Current Listings

Login to **Proplink** > **Current Listings** > **Details** > **Save** > **Sold** > Insert Details of the sale and record as an **Internal Sale** > Click on to **Salesperson** box and nominate the Selling Salesperson > Click on to **Sale Date** > **OK**

The next time you do a **Transfer** the property will be withdrawn from all of the **Internet Sites** and all of your **Alliance Offices**. The Property Details and the Purchaser Details still reside in Proplink **Sales History**

All subsequent tasks will draw on the information you have already put into Proplink

1.5.3 Close-off Advertising

Login to **Advertising Manager** > Select the property by clicking on to it > **Print Invoice** > **Print**

1.5.4 Insert Commissions and Advertising Expenditures in "Money"

Login to **Money** > **Sales Exchanged** > **Import** > search for the sold property address > **Done** > when the property address is returned click on to it > **Adv.** [returns the advertising expenditures for that address] > the amounts that have been returned are now visible when you click the **'Expenses'** button > **Comm.** [returns the Commission calculation screen] > Complete the information required on the right hand side of the screen. If there is an over expenditure in advertising you have the choice to deduct it from the Gross Commission > **Refresh** > **New** > returns a new 'row' on the left side of the screen > Double Click in the **Name** column and select the sales person > Double Click in the **Action** column and select the action > Double Click in the **%** column and insert the percentage for the action > the amount will be automatically calculated > **New** > returns another new 'row' below the previous one, on the left side of the screen > Double Click in the **Name** column and select the sales person > Double Click in the **Action** column and select the action > Double Click in the **%** column and insert the percentage for the action > the amount will be automatically calculated > Repeat the previous Action until the **Total Commission** agrees with the **Net Commission**

1.5.5 Sign off 'In-Process' - Pre Sale

Have you performed all of the tasks your pre-determined service levels required during the Pre Selling period? If any corrective action is required submit the report to the next Management Review Meeting

Login to **'Scheduler'** > **Current Listings** > select the property address > **Print** (small button)

Once you have printed your pre sale 'In-Process' report, your pre sale 'Scheduled Tasks' are no longer required so you can now 'Delete' this function before you exit the 'Scheduler' program

1.5.6 Just-Sold - Vendor Kit

Login to **Sales History >** highlight the property you require the 'Just Sold Vendor Kit' to represent **> Tasks > After Exchange Activities > Vendor Letter & Kit > Design > Preview >** Check the document is correct and all of the merge fields have been returned **> Print** document**.**

Whenever you have completed the above task always inform **'Scheduler'** as follows
Login to **Scheduler** > **Master Tasks** > insert the Dates > the Master-In-Process form will display "**Current Listing Addresses**" and the tasks that are required to be done. When that task has been completed you must click **'Done'** and insert the date the task was done. This action creates a log. If the task needs to be rescheduled click **'Rescheduled'** and insert the rescheduled date.

1.5.7 Vendors Solicitor Instructed

Login to **Sales History >** highlight the property for which you require the Solicitors to be instructed **> Tasks > After Exchange Activities > Instructing Vendor's Solicitor > Design > right click on to the letter > Edit > manually insert the deposit you are holding** (this will be automated shortly) **> Close > Save > Preview >** Check the document is correct and all of the merge fields have been returned **> Print** document**.**

Whenever you have completed the above task always inform **'Scheduler'** as follows
Login to **Scheduler** > **Master Tasks** > insert the Dates > the Master-In-Process form will display "**Current Listing Addresses**" and the tasks that are required to be done. When that task has been completed you must click **'Done'** and insert the date the task was done. This action creates a log. If the task needs to be rescheduled click **'Rescheduled'** and insert the rescheduled date.

1.5.8 Purchasers Solicitor Instructed

Login to **Sales History >** highlight the property for which you require the Solicitors to be instructed **> Tasks > After Exchange Activities > Instructing Purchaser's Solicitor > Design > right click on to the letter > Edit > manually insert the deposit you are holding** (this will be automated shortly) **> Close > Save > Preview >** Check the document is correct and all of the merge fields have been returned **> Print** document**.**

Whenever you have completed the above task always inform **'Scheduler'** as follows
Login to **Scheduler** > **Master Tasks** > insert the Dates > the Master-In-Process form will display "**Current Listing Addresses**" and the tasks that are required to be done. When that task has been completed you must click **'Done'** and insert the date the task was done. This action creates a log. If the task needs to be rescheduled click **'Rescheduled'** and insert the rescheduled date.

1.5.9 Just Purchased - Purchasers kit

Login to **Sales History >** highlight the property for which you require the 'Purchaser's letter and kit' to represent **> Tasks > After Exchange Activities > Purchaser's Letter & Kit > Design > Preview >** Check the document is correct and all of the merge fields have been returned **> Print** document**.**

Whenever you have completed the above task always inform **'Scheduler'** as follows
Login to **Scheduler** > **Master Tasks** > insert the Dates > the Master-In-Process form will display "**Current Listing Addresses**" and the tasks that are required to be done. When that task has been completed you must click **'Done'** and insert the date the task was done. This action creates a log. If the task needs to be rescheduled click **'Rescheduled'** and insert the rescheduled date.

1.5.10 Vendor Appreciation letter & Gift

Fourteen Days after the sale, send a letter of appreciation and a gift to the sellers.

Login to **Sales History >** highlight the property for which you require the Vendor's Appreciation Letter to represent **> Tasks > After Exchange Activities > Vendor's Appreciation letter > Design > Preview >** Check the document is correct and all of the merge fields have been returned **> Print** document**.**

The gift you attach is up to you

1.5.11 Just Sold - Neighbours letter

Login to **Sales History >** highlight the property for which you require the Just Sold Neighbour letter to represent **> Tasks > After Exchange Activities > 'Just Sold' neighbour's property > Design > Preview >** Check the document is correct and all of the merge fields have been returned **> Print** document**.**

Whenever you have completed the above task always inform **'Scheduler'** as follows
Login to **Scheduler** > **Master Tasks** > insert the Dates > the Master-In-Process form will display "**Current Listing Addresses**" and the tasks that are required to be done. When that task has been completed you must click **'Done'** and insert the date the task was done. This action creates a log. If the task needs to be rescheduled click **'Rescheduled'** and insert the rescheduled date.

1.5.12 Remove Key

Remove Key from property, tag it and file it in "Keys Awaiting Settlement" safe.

Login to **Proplink** > **Sales History** > Search for property > **Details** > **Inspection** > **Key No** = "Keys Awaiting Settlement" number

Whenever you have completed the above task always inform **'Scheduler'** as follows
Login to **Scheduler** > **Master Tasks** > insert the Dates > the Master-In-Process form will display "**Current Listing Addresses**" and the tasks that are required to be done. When that task has been completed you must click **'Done'** and insert the date the task was done. This action creates a log. If the task needs to be rescheduled click **'Rescheduled'** and insert the rescheduled date.

1.5.13 Pointer-Boards - Thank you letter

Login to **Sales History >** highlight the property for which you require the Pointer Board - than you letter to represent > **Tasks > After Exchange Activities > Pointer Board Appreciation Letter > Design > Preview >** Check the document is correct and all of the merge fields have been returned **> Print** document**.**

Whenever you have completed the above task always inform **'Scheduler'** as follows
Login to **Scheduler** > **Master Tasks** > insert the Dates > the Master-In-Process form will display "**Current Listing Addresses**" and the tasks that are required to be done. When that task has been completed you must click **'Done'** and insert the date the task was done. This action creates a log. If the task needs to be rescheduled click **'Rescheduled'** and insert the rescheduled date.

1.5.14 Remove Pointer Boards

Contact your Board Contractor and request removal of every Pointer Board. The addresses of the pointer boards can be found as follows

Login to **Proplink** > **Sales History** > Search for property > **Details** > **Vendor** > **Vendor Notes** = addresses for Pointer Boards can be found here

Whenever you have completed the above task always inform **'Scheduler'** as follows
Login to **Scheduler** > **Master Tasks** > insert the Dates > the Master-In-Process form will display "**Current Listing Addresses**" and the tasks that are required to be done. When that task has been completed you must click **'Done'** and insert the date the task was done. This action creates a log. If the task needs to be rescheduled click **'Rescheduled'** and insert the rescheduled date.

1.5.15 Balance of deposit is now due

When you Exchanged Contracts and activated the Scheduled Tasks for the After Exchange (Pre Settlement) period, you will have changed the 'due date for the Balance of Deposit' to the actual date the balance of deposit is due. When that date arrives, check the status of money held against that property in your Trust Account as follows

Login to **Money** > **Trust Ledgers** > locate the property address > **Done** = Check to see if the deposit has been paid. If not follow it up.

1.5.16 Remove 'For-Sale' Board

Instruct Board Company to remove the Board

1.5.17 Account-Sales sent

Login to **Sales History >** highlight the property for which you require the Account Sales to represent **> Tasks > After Exchange Activities > Account Sales > manually insert the following information** (this process will be automated shortly) **> click on to the money amount (opposite the 'Deposit Received' box (the $ amount in that box will be displayed at the top left side of the screen) > manually insert the Deposit Received amount in to this box at the top left side of the screen > repeat this process as required > Preview >** Check the document is correct and all of the merge fields have been returned **> Print** document**.**

Whenever you have completed the above task always inform **'Scheduler'** as follows
Login to **Scheduler** > **Master Tasks** > insert the Dates > the Master-In-Process form will display "**Current Listing Addresses**" and the tasks that are required to be done. When that task has been completed you must click **'Done'** and insert the date the task was done. This action creates a log. If the task needs to be rescheduled click **'Rescheduled'** and insert the rescheduled date.

1.5.18 Household Inventory Booklet prepared

To help the New Purchaser with their Household Insurance you can publish and deliver to them this 'Household Inventory Booklet'

Login to **Sales History >** highlight the property for which you require the Household Inventory Booklet to represent **> Tasks > After Exchange Activities > Household Inventory Booklet > Design > Preview >** Check the document is correct and all of the merge fields have been returned **> Print** document**.**

Whenever you have completed the above task always inform **'Scheduler'** as follows
Login to **Scheduler** > **Master Tasks** > insert the Dates > the Master-In-Process form will display "**Current Listing Addresses**" and the tasks that are required to be done. When that task has been completed you must click **'Done'** and insert the date the task was done. This action creates a log. If the task needs to be rescheduled click **'Rescheduled'** and insert the rescheduled date.

1.5.19 Questionaire to vendor

Will your vendors refer you to any of their friends or recommend your service?

Login to **Sales History >** highlight the property for which you require the Vendor's Questionnaire to represent **> Tasks > After Exchange Activities > Vendor's Questionnaire > Preview >** Check the document is correct and all of the merge fields have been returned **> Print** document**.**

Whenever you have completed the above task always inform **'Scheduler'** as follows
Login to **Scheduler** > **Master Tasks** > insert the Dates > the Master-In-Process form will display

"**Current Listing Addresses**" and the tasks that are required to be done. When that task has been completed you must click **'Done'** and insert the date the task was done. This action creates a log. If the task needs to be rescheduled click **'Rescheduled'** and insert the rescheduled date.

1.5.20 Introducing-New-Neighbours letter

Login to **Sales History >** highlight the property for which you require the Introducing New Neighbour letter to represent **> Tasks > After Exchange Activities > Introducing New Neighbour > Design > Preview**. Check that the merge fields have been returned **> Print** document**.**

Whenever you have completed the above task always inform **'Scheduler'** as follows
Login to **Scheduler** > **Master Tasks** > insert the Dates > the Master-In-Process form will display "**Current Listing Addresses**" and the tasks that are required to be done. When that task has been completed you must click **'Done'** and insert the date the task was done. This action creates a log. If the task needs to be rescheduled click **'Rescheduled'** and insert the rescheduled date.

1.5.21 Settlement Day Gift

A Hamper for the Purchasers?
A Pizza Voucher?
A Tradesperson for a day?

1.5.22 After-Settlement letter and Questionaire to purchaser

Login to **Sales History >** highlight the property for which you require the Vendor's Questionnaire to represent **> Tasks > After Exchange Activities > Purchaser's Questionnaire > Design > Preview >** Check the document is correct and all of the merge fields have been returned **> Print** document**.**

Whenever you have completed the above task always inform **'Scheduler'** as follows
Login to **Scheduler** > **Master Tasks** > insert the Dates > the Master-In-Process form will display "**Current Listing Addresses**" and the tasks that are required to be done. When that task has been completed you must click **'Done'** and insert the date the task was done. This action creates a log. If the task needs to be rescheduled click **'Rescheduled'** and insert the rescheduled date.

1.5.23 Set up Anniversary Sales-History activity

Every year send your Purchasers (Now Vendors) an anniversary card plus any Birthday Cards etc

Login to **Scheduler** > **History** > **Import** (large Button) > insert address > **Done** > **Import** (small Button) > if you want to insert added tasks click **Add** and insert the date you want the task to be performed > **Exit**

1.5.24 Sign off 'Process Control'

Have you performed all of the tasks your pre-determined service levels required during the After Exchange period? If any corrective action is required submit the report to the next Management Review Meeting

Login to **'Scheduler'** > **After Exchange** > select the property address > **Print** (small button)

Once you have printed your After Exchange 'Process Control' report, your After Sale 'Scheduled Tasks' are no longer required so you can now 'Delete' this function before you exit the 'Scheduler' program

1.6 Administration

Instructions on how to perform other Administration tasks are explained by 'double-clicking' on to **'Administration'** in the **Table of Contents** on the left side of this screen

The majority of Tasks performed by Administration fall into either 'Scheduled Tasks' or 'Recurring Tasks'.
'Scheduled Tasks' occur as a result of a Sale or Listing or Rental or Prospecting. 'Recurring Tasks' are events that happen every day, week or period. In Scheduler you can setup these Recurring Tasks, allocate them a date on which they need to be performed. When then are performed they should be 'Rescheduled' to the next day, week or period that they will need to be redone.

Login to **Scheduler** > **Recurring Tasks** > Add/alter the existing list > Next to 'Schedule" change the date to the next date (or day) that you want to see these Tasks appear.

If you click on to **Today's Tasks** you will receive all of the tasks that need to be done that day (click on 'Rescheduled' when you have completed a 'Recurring Task' and click on 'Done' when you have completed a 'Scheduled Task'). If a 'Scheduled Task' cannot be done on the day allocated 'Reschedule' it to the appropriate date.

If you click on to Master you can insert any set of Dates to return both 'Scheduled' and 'Recurring' Tasks. Often this function is required to project into the future or to complete unfinished tasks from the past

1.6.1 Creating a New Merge Letter in Tasks

The easiest way for you to create a Merge Letter in Proplink is to simply copy one that is already there and change it.
Proplink > Potential Vendor > tasks > click 'Pre Listing' > click '01 - Pre Listing - Appointment Letter' > Design > File > Save As > "save it somewhere" > Close out of the screen > under the 'Name' column click the Add button > give the letter a name > OK > Design > File > Open > select the letter you have just saved > Open > right click on the big box containing the letter's text > Edit > create your letter > to insert a 'merge field' click on to where you want that merge field to be located > Edit > Insert Field > select the field you require > OK > when you have finished close the 'Rich Text Editor' and Save > click the 'Preview' tab > close out when you are happy > and save your work. You now have a letter that you can send.
To send to multiple Potential Vendors > click onto the Potential Vendors you require (while holding down the 'Ctrl' key) > Tasks > select then letter you want > Print
To view a video of this task click here

1.6.2 Downloading the Lastest Multilink Systems Manuals

http://www.multilink.com.au/downloads/downloads.htm

click here

1.6.3 Recurring Tasks

Every Day, Week, Month and Year there are Recurring Tasks that Administration needs to perform. To access the Recurring Tasks

Login to **Scheduler** > **Master** > insert dates > view the recurring tasks that need to be performed > click **Reschedule** for the same day next week etc.

Recurring Tasks should not be deleted because they will be needed again either next week, next month etc.

Every office may have different Recurring Tasks but here are a few to get you started

MONDAY	Record Internal Sales made on the weekend & Process
	Input Auction results from the weekend into Sales History
	Update all Advertising Schedules with the Actual Sizes and Costs of advertisements from the weekend
	Update Proplink from Sales Activity Daybook
	Update Advertising Notice-boards & Pin up OFI Schedule, Property Run and redirect ads for the coming fortnight
	Issue any Advertising Invoices to vendors if required
	Approve payments for invoices received
	Input Qualified Buyers into Proplink from weekend and print out reports
	Insert incomplete Buyer Information on Buyer Inquiry form
	Update Diary
	Check 'In-Process' Management for any 'Contracts Exchanged' files that need to be progressed
	Check Today's Recurring Tasks.
	Create 'In Process' for any New Listings
	Print out daily banking sheet and take deposits to the bank
	Send 'Passed-in" letters if required
	Enter new listings, Print out Call Sheets, Group Fact Sheets
TUESDAY	Update system from Sales Activity Daybook
	Chair Managers Meeting and Sales Meeting
	Enter new listings, Print out Call Sheets, Group Fact Sheets
	Prepare Sales Kits for New Auction & Exclusive listings
	Record Sales made Yesterday & Process
	Input yesterdays buyers into the system and print out reports
	Input results of last night's follow-ups
	Prepare Weekly Property Activity Reports for All vendors
	Prepare Wednesdays Advertising & allocate costs
	Check Today's Daily Tasks
	Update Diary
	Approve Payment for Invoices Received
	Print out Auction Invitations and give to sales persons
	Check In-Process Vendor Management for any files that need to be progressed
	Print out daily banking sheet and take deposits to the bank

WEDNESDAY Record Sales made Yesterday & Process

Update system from Sales Activity Notebook

Enter new listings, Print out Call Sheets, Group Fact Sheets

Prepare Sales Kits for New Auction & Exclusive listings

Check New Listings Letterbox for buyers & print out

Cut and Paste today's Advertisements

Fax a copy of all new listings to other top agents in your area.

Check Today's Daily Tasks. Perform required tasks immediately or make a list

Print out "Buyers not contacted for 21 Days" reports from each sales persons Buyers Register and give the report to each sales person for them to follow-up.

Update Diary

Print and Distribute new stock sheet

Check In-Process Vendor Management for any files that need to be progressed

Print out daily banking sheet and take deposits to the bank

THURSDAY Advertising & Sales meeting

Input Saturday's forthcoming Auctions from the Internet

Property Run

Record Sales made Yesterday & Process

Prepare Sales Kits for New Auction & Exclusive listings

Input yesterdays buyers into system and print out reports

Input results of last night's follow-ups

Enter new listings, Print out Call Sheets, Group Fact Sheets

Update system from Sales Activity Notebook

Prepare Sales Kits for New Auction & Exclusive listings

Prepare Local Paper Advertisements & allocate costs

Prepare Weekend's Advertisements & allocate costs

Update Diary

Pay Day - Wages & Advances & Commissions

Prepare OFI's for the weekend and notify vendors

Check In-Process Vendor Management for any files that need to be progressed

Print out daily banking sheet and take deposits to the bank

FRIDAY	Record Sales made Yesterday & Process
	Input yesterdays buyers into system and print out reports
	Prepare Sales Kits for New Auction & Exclusive listings
	Input results of last night's follow-ups & telemarketing
	Enter new listings, Print out Call Sheets, Group Fact Sheets
	Update Diary
	Update system from Sales Activity Notebook
	Check Today's Daily Tasks. Perform required tasks immediately or make a list
	Check Calendar to see if any Pre Sale or After Sale files are scheduled to be progressed
	Complete Open for Inspection report for weekend and distribute to sales team.
	Print out Auction "Best Wishes" letters
SATURDAY	Check that all ads appeared as ordered, cut and paste them

1.6.3.1 Sorting the 'Current Listings' & 'Shared Listings' Screens

You can set up both the Current Listings and Shared Listings screens to suit your requirements.

Example: - to sort the screens by Property Type:
Click on to the 'Text' tab at the top of the screen > click on to the 'Type' heading and hold down left side of mouse while you drag the 'Type' label into the 'yellow box' then release the left side of the mouse. The screen will now sort all of the properties by 'Type'. Click on to the + sign next to 'Type' to open all of the properties in that 'Type'. Click on to the - sign next to 'Type' to close all of the properties in that 'Type'.

You can choose to sort the screens by any 'Column' or 'Group of Columns'

You can also re-arrange the order that columns are presented on the screen by 'dragging and dropping' the Column Heading wherever you wish in the 'Blue' Column Heading row.

Clicking on to the 'Images' tab - at the top of the screens - will return Images of properties in the same order that they were returned on the previous 'Text' screen.

Clicking on to each Image will return that property's 'Details' on the left side of the screen.

You can have as many or as few Images per screen that you require by moving your cursor to the side of any of the images and when the <-> arrow appears moving it sideways. Moving the cursor to the left will reduce the size of the Images and return additional Images on to the screen. Moving the cursor to the right, will increase the size of the Images and reduce the number of Images on the screen.

1.6.3.2 Helpful Keystrokes

To minimise a Proplink Screen > click the 'Show Desktop' icon on the Microsoft 'Task Bar'

When inserting information, hit the 'Tab' key every time you wish to move to the next field
Hit the Shift/Tab keys to move back to the previous field
Hit the Ctrl/C keys to Copy whatever you have highlighted
Hit the Ctrl/V keys to Paste whatever you have copied
Hit the Ctrl/X keys to Cut whatever you have highlighted
Hit the Alt/Tab keys to move from one 'opened' program to another 'opened' program. Take your finger off the Tab key when you arrive at the program you wish to display

1.6.3.3 Rental List

Rental Lists need to be regularly printed or emailed. The list can be of **'All'** available properties or can be of **'Selected'** properties only.

If **'All'** available properties
Login to **Proplink** with your Rent user name and password > **Current Listings** > **Print** > in the '**Which Properties**' frame > activate **All** > in the '**Print Format**' frame activate the format you require > in the '**Sort By**' frame activate the way you wish the report to be sorted . You can change the Title of the Report by inserting a Title in the '**Custom Title**' box > You can tailor the 'Shared Listings' in the report to be specific to the Postcodes you require by clicking **Postcodes** and inserting the Postcodes you require > **Print**

If **'Selected'** properties only
Login to **Proplink** with your Rent user name and password > **Current Listings** > highlight a property by clicking on to it > **Select** > highlight the next property > **Select** > repeat until you have selected all of the properties you want in the report > **Print** > in the '**Which Properties**' frame > activate **Selected** > in the '**Print Format**' frame activate the format you require > in the '**Sort By**' frame activate the way you wish the report to be sorted . You can change the Title of the Report by inserting a Title in the '**Custom Title**' box > You can tailor the 'Shared Listings' in the report to be specific to the Postcodes you require by clicking **Postcodes** and inserting the Postcodes you require > **Print**

1.6.3.4 Inserting a New Listing in Proplink

Both **Sales** and **Rental** Listings can be inserted and Managed in Proplink. Any task that can be done for a Sales File can also be conducted for a Rental File.
The only difference is how you log in to Proplink. If you login with a Rental Password the system sets up for Rentals. If you login with a sales Password the system sets up for sales (see 'Proplink' in 'Setting up the Multilink System')

Login to **Proplink** > **Add Property** > select type of listing (both the 'Auction' and 'Private' types insert a + sign next to the price plus the automatic matching-search-criteria for Buyers differs from the other listing types - See Multilink Set up - Tools)

The next screen has 'Buttons' at the bottom and 'Tabs' at the top

Basic - tab
Insert Address, Suburb (click the ... button to search for a Suburb name and corresponding postcode) Postcode, Map Ref, Substitute Address Display (whatever you insert in this field will be displayed on the Internet in lieu of the Address), Property Type (select from drop-down-box), Price, Listing Authority (select from drop-down-box), Expiry Date (if required), Substitute Price/Display Range (If you want to display a Price Range on the Internet in lieu of the Price inserted previously, you insert the Price

Range here), Advertising Title (insert the title you would like to see on the Internet, Local Paper, Brochures, Window Display etc.), Property id (is automatically given to each property by the system), Advertising Copy (for display on the Internet and Internal Reports)

Vendor - tab
Vendor Company Name (if vendor is a company), Vendor title (insert or choose from drop-down-box), Vendor First Name, Vendor Surname, Vendor Address, Vendor Suburb, Postcode, Vendor Phone ah, Vendor Phone bus, Vendor Mobile, Vendor Fax, Vendor Email, Vendor Notes (anything you want to add about the Vendor or Property)

Inspection - tab
Occupier (insert or choose from drop-down-box), Tenant First Name, Tenant Surname, Tenant Phone ah, Tenant Phone bus, Tenant Mobile, Tenant Fax, Tenant Email, Rent Being Paid, Lease End Date (from drop-down-box), Tenant Notes, Inspection Notes, Key Number,
OFI Times button (Open for Inspection Times) > Add > Insert OFI Dates and Times). These times will be displayed on the Internet or could be printed out. To print all OFIs for the following 7 day period

Login to **Proplink** > **Current Listings** > **Print** > in 'Which Properties' frame > activate **OFI** > in 'Print Format' frame > activate **OFI Report**.

Description - tab
Title (type in or select from drop-down-box), Floor Area, Land Size (type-in land size with no spaces to automatically calculate Land Area e.g. 16.45x32.71 then hit the 'tab' key, Land Area (inserted automatically if you have previously inserted the Land Size or type it in manually), Zoning, Facing, Construction, Construction Date, Water Rates, Council Rates, Strata Levies, Roof (type in or select from drop-down-box), Balcony, Verandah, Car Parking, Type of HWS (Hot Water System), Heating, Air Conditioning, No. of Toilets,

Internal - tab
Number of Rooms, Number of Bedrooms, Hall, Study, Lounge, Dining Room, Family Room, Rumpus Room, Other, Laundry, Breakfast Area, Bedroom 1, Bedroom 2, Bedroom 3, Bedroom 4, Bedroom 5, Bedroom 6, Bathroom 1, Bathroom 2,

Remarks - tab
Kitchen description, Extra Notes, Describe Features of Property, Locality Description (if you have inserted the Map Ref mentioned previously and you insert a Locality Description then every time you insert that same Map Ref. against other properties in the future this Locality Description will be automatically included)

Agent - tab
Listing Agent (your company name from Proplink Set up will be automatically included), Agent Address (your company name from Proplink Set up will be automatically included), Agent Suburb (your company name from Proplink Set up will be automatically included), Agent Phone (your company name from Proplink Set up will be automatically included), Lister (will return the name of whoever logged in - if you wish to change the Lister - click on to the Lister box > select another sales person > OK, Manager (if you wish to add a Manager - click on to the Manager box > select a sales person > OK, Contact 1 (if you wish to add a Contact Salesperson - click on to the Contact 1box > select a sales person > OK, Contact 2 (if you wish to add another Contact Salesperson - click on to the Contact 2 box > select a sales person > OK, Contact 3 (if you wish to add another Contact Salesperson - click on to the Contact 3 box > select a sales person > OK, Contact 4 (if you wish to add another Contact Salesperson - click on to the Contact 4 box > select a sales person > OK, Contact 5 (if you wish to add another Contact Salesperson - click on to the Contact 5 box > select a sales person > OK, Contact 6 (if you wish to add another Contact Salesperson - click on to the Contact 6 box > select a sales person > OK, Agreed Advertising Amount (insert the amount that the vendor has agreed to spend), Commission (insert the commission formula or amount, Commission Split (insert the formula or amount you will pay another agent if they sell the property, Conjunctional Agent, Last Changed (will be automatically updated each time you add or change information to the

record)

Solicitor - tab
Solicitor Company, Solicitor Address, Suburb, Postcode, Solicitor First Name, Solicitor Surname, Solicitor Phone, Solicitor Fax, Solicitor Mobile, Solicitor Email

Trustees - tab
If Property is a Deceased Estate and the Vendors are the Trustees (on behalf of the Deceased) insert the Deceased's First Name, Surname, Address, Suburb, Postcode

Tours - tab
Displays the link supplied by your Virtual Tour Supplier on the Internet so that anyone viewing this property on the Internet can also have a Virtual Tour.
Virtual Tour URL 1 (Insert the Internet Link address supplied by your Virtual Tour supplier) for that property, Virtual Tour Type (Insert The Virtual Tour Supplier from the drop-down-box)

Attachments - tab
Attach any type of file in this screen e.g. Gif (Floor Plans), PDF (Vendor Statements, Architectural Plans, Word Documents etc.
Plan 1 (click **Attach** button to locate the file you wish to attach, click **View** button to view that file, click **Delete** button to delete the attachment), Add up to 6 attachments per property.

Sharing - tab
This is the Distribution Centre command screen. Instead of manually instructing this screen every time you list a property you can automatically instruct this screen with default instructions (See Proplink Setup)
In the '**Share List Type**' box choose **Alliances** from the drop-down-box
Distributor 1 (should always read **INTERNET**)
To instruct the Distributor column > in the **'Type'** frame > activate **'Distributors'** > locate the distributor that you want within the Distributor Names supplied (scroll down to see more names) > click on to the name of the Distributor e.g REALESTATE.COM > hold down the left hand side button of the mouse and drag the Distributor Name into the **Distributor 2** box and then let go of the mouse button. That Distributor Name should now be in the Distributor 2 box. Repeat this process until all the Distributors that you want to engage are entered > go back to the **'Type'** frame and activate **'Alliances'** > a new list of Alliance Names will be returned > in the '**Share With**' frame activate **'Office'** > select the Alliance Office name you would like to share this property listing with by clicking on to it > hold down the left hand side button of the mouse and drag the Alliance Office Name into the **Alliance 1**box and then let go of the mouse button. That Alliance Office Name should now be in the Alliance 1box. Repeat this process until all the Alliance Office Names that you want to engage are entered.
If you want to share the listing with more than one Alliance Office in the same group > e.g. Several Franchise Offices within the same area > in the '**Share With**' frame activate **'Branch'** > select the Branches you would like to share this property listing with by clicking on to it > hold down the left hand side button of the mouse and drag the Branch Name into the **Alliance** box and then let go of the mouse button. That Alliance Branch should now be in the Alliance box. Repeat this process until all the Alliance Branch Names that you want to engage are entered.
If you want to share the listing with more than one Branch of a Group > e.g. All Franchise Offices within the group > in the '**Share With**' frame activate **'Group'** > select the Group you would like to share this property listing with by clicking on to it > hold down the left hand side button of the mouse and drag the Group Name into the **Alliance** box and then let go of the mouse button. That Group Name should now be in the Alliance box. Repeat this process until all the Group Names that you want to engage are entered.
Next time you do a **Transfer** the listed property will now automatically be sent to all of the **Distributors** and all of the **Alliances** you have on the Screen.

If you do not want the listing information to leave your office
In the '**Share List Type**' box choose **Internal** from the drop-down-box

If you want to Multiple List the listing information to every agent, everywhere.
In the '**Share List Type**' box choose **Multilist** from the drop-down-box. You will notice that the **Alliance** Column has now been renamed to **'Enemy'**. You can now exclude Offices, Branches or Groups from receiving this information by dragging and dropping their names as above.

Purchaser - tab
The Purchaser's Details will be entered when the property is sold

Purchaser's Solicitor - tab
The Purchaser's Solicitor Details will be entered when the property is sold

When the Text Data has been entered you should now add the Pictures to the property (See - 'Downloading Photos into Proplink' - in 'Managing Current Listings' section)
To view a video of this task click here

1.6.3.5 Recording Internal Sales

Login to Proplink > click on to the property > Details > Save > Sold > activate Internal > fill in the dialogue box. To view a video of this task click here

1.6.3.6 Activating 'Scheduler' after a Sale

Whenever you sell a property there are many future tasks that need to be performed. So that you do not forget to perform any of these important functions you can automate them

Login to **Scheduler > After Exchange > Import** (the one at the bottom of the screen) > Enter the new Listing's address. > When the property address is returned **> Done > Import** (the small Import button) **> S**elect the tasks you wish to Import by activating the tick box next to each task **> OK** (if you wish to automatically Import all of the tasks simply click the **'All'** button)**.** You can **Add** or **Delete** tasks after they have been returned
These tasks will now automatically appear in your **Master** task function. Each time you perform a required task set for that day click the **Done** button and record the Date. When the After Exchange settles you can click the **Print** button and receive an 'In-Process' report that compares your Scheduled vs Actual activities To view a video of this task click here

1.6.3.7 Activating 'Scheduler' after a New Listing

When you List a property you can activate a list of Scheduled Tasks to manage that listing. Before you activate any Schedule List you must first establish what tasks you want to perform (see Multilink Setup)

Login to **Scheduler > Current Listings > Import** (the big 'Import' button is located at the bottom of the screen) > Enter the new Listing's address. > When the property address is returned **> Done > Import** (the small Import button) **>** Select the tasks you wish to Import by activating the tick box next to each task **> OK** (if you wish to automatically Import all of the tasks simply click the **'All'** button). You can **Add** or **Delete** tasks after they have been returned
These tasks will now automatically appear in your **Master t**ask function. Each time you perform a required task set for that day click the **Done** button and record the Date. When the Current Listing sells you can click the **Print** button and receive an 'In-Process' report that compares your Scheduled vs Actual activities To view a video of this task click here

1.6.3.8 Updating Advertising Schedules

After you have cut out the adds and pasted them in your Add Book you need to update the Advertising Manager program with the 'Actual Size' and 'Actual Cost' of the advertisements. You can then compare the 'Actual' with the 'Predicted'

Login to **Advertising Manager** > **Advertising Management** > select a property > **Media** > click on **Actual Size** column > insert the Actual Size of the add -if a line-add, insert the number of lines immediately followed by the letter L (no spaces) then hit the 'tab' key or if the add was a Display Add insert the size of the add e.g. 6x2 (no spaces) or 12u if measured by 'Units' and then hit the 'tab' key. The cost of the add will be returned including 'Company Cost' and Casual (or Client) Cost. To view a video of this task click here

To update an Advertising Cost - that is not media
Login to **Advertising Manager** > **Advertising Management** > select a property > **Other** > Import > tick the Items you want to include then click **OK** To view a video of this task click here

To set-up the 'Media Costs' template see Multilink Set-up [Advertising Manager]

1.6.3.9 When the Advertising Invoice arrives

Login to **Advertising Manager** > click on to a property > **Media** > Locate the advertisement referred to in the Invoice and change its status from 'Unapproved' to 'Approved'
Go to the next advertisement and repeat the above. To view a video of this task click here

If the invoice was for an item other than Media
Login to **Advertising Manager** > click on to a property > **Other** > Locate the Item referred to in the Invoice and change its status from 'Unapproved' to 'Approved' To view a video of this task click here

1.6.3.10 Paying the Advertising

When you are ready to pay the 'Media Advertising' Invoices

Login to **Advertising Manager** > **Master Marketing Report** > activate **'Media' Approved Report** > **Print**. This will print out a report of all of the Media Invoices that you have previously approved for payment.

Manually insert the cheque number and date against those amounts that you wish to pay then.
Login to **Advertising Manager** > click on to a property > **Media** > Locate the advertisement referred to and change its status from 'Approved' to 'Paid'. File the print-out. To view a video of this task click here

When you are ready to pay the 'Other' Invoices

Login to **Advertising Manager** > **Master Marketing Report** > activate **'Other' Approved Report** > **Print**. This will print out a report of all of the 'Other' Invoices that you have previously approved for payment.

Manually insert the cheque number and date against those amounts that you wish to pay then.
Login to **Advertising Manager** > click on to a property > **Other** > Locate the Item referred to and change its status from 'Approved' to 'Paid'. File the print-out. To view a video of this task click here

1.6.3.11 Balancing Trust Account

Periodically the Trust Account must be balanced.

Login to **Money** > **Reconcile** > does the Opening Balance Agree with Bank Statement? (if it is your first reconciliation and you do not want to include all of your previous ledges, you will need to run 2 trust balances until all of the previous trust ledges have been closed) > insert the ending balance on your Bank Statement > **OK** > locate a payment on the left side of the screen > locate the corresponding payment on your Bank Statement > tick the Bank Statement > click that payment on the screen (a "c" will appear next to the payment). Repeat until all of the payments that have been cleared on the Bank Statement have been ticked.
If there is a payment on the Bank Statement that has not been included in the Trust Account or if a payment in the Trust Account needs to be altered > 'Right' click on to that payment > select 'New Transaction' (to add a record), 'Edit Current Transaction' (to change the existing details), 'Delete Current Transaction' (to delete the record).
When all **Payments** and **Deposits** amounts have been agreed the amount in the "**Difference**" box (located at the bottom right-hand-side of the screen) should return a **$0.00** amount > **Finished** > Make sure that the Balance Date is the last day of the month > **Print** a Summary Copy of the Report (the other reports mentioned are also recommended) To view a video of this task click here

You will need to verify the figure contained in this **"Reconciliation Summary at (Date)"** report, against the Balances in all of your Sales Trust Ledgers. The figure that needs to agree with the Balances in your Trust Ledgers, is the amount shown next to **"Register Balance as of (date)"**.

To obtain a print out of your Ledger Balances
Login to **Money** > Trust Account **'Reports'** > **Ledgers** > leave date in the **'From'** date box 'blank' and insert the last day of the monthly balance period in the **'To'** date box > activate '**Current Cashbook**' only > **Print** To view a video of this task click here

When a Sales Ledger is finished and the Ledger Balance = $0.00 and the Ledger Amounts have been reconciled with the Bank, you can move that ledger into History Ledgers.
Login to **Money** > **Trust Ledgers** > select a property address > **Done** > **Print** (place the print out in the Sales File) > **History** (you can still access the ledger by clicking on to **History Ledgers**) To view a video of this task click here

1.6.3.12 Preparing for a Sales Meeting

ADVERTISING EXPENSES
Every sales person should be responsible for their own expenditures and must be kept informed of what was Predicted for the previous week against what was Actually Spent during that week.

a) If you want a **'By Sales Person'** report of Advertising Expenditures
Login to **Advertising Manager** > **Master Marketing Report** > activate **'By Salesperson'** > click in to the **Salesperson** box and select a sales person > **Done** > **Print**. If you want all of the Sales People to be on the same report do not click on to the Salesperson box.

b) If you want a **'By Property'** report of Advertising Expenditures
Login to **Advertising Manager** > **Master Marketing Report** > activate **'By Property'** > click the 'drop-down-box' next to **Address** and select the property you require > **Print**
To view a video of this task click here

KEY PERFORMANCE INDICATORS
Will tell you how a sales person or how the entire sales team are performing in Key Areas

Login to **Research** > **Key Perf. Indicators** > insert the number of days you want the report to cover >

click in to the **Salesperson** box and select a sales person > **OK** > **OK**. If you want the activity of all of the Sales People to be on the same report do not click on to the Salesperson box > **OK**
To view a video of this task click here

NEW LISTING REPORT

Displays the new listings since the last property report so that they can be discussed and included in the office 'Property Run'.

Login to **Research** > **New Listing Report** > insert the number of days you want the report to cover > click in to the **Salesperson** box and select a sales person > **OK** > **OK**. If you want the New Listing Report to cover all of the New Listings of all Sales People since the last report do not click on to the Salesperson box > **OK**
To view a video of this task click here

INTERNAL SOLD PROPERTIES REPORT

Displays the sold properties since the last report

Login to **Research** > **Sold Properties Report** > insert the number of days you want the report to cover > click in to the **Salesperson** box and select a sales person > **OK** > **OK**. If you want the Sold Properties Report to cover all of the Sold Properties of all Sales People since the last report do not click on to the Salesperson box > **OK**
To view a video of this task click here

PRINT A STOCK SHEET

Login to **Proplink** > **Current Listings** > **Print** > activate 'Stock Sheet' or 'Stock Sheet Condensed' (abbreviated version) > **Print**
To view a video of this task click here

PRINT OR EMAIL ALL 'ACTIVITY REPORTS'

All 'Property Activity Reports' should be reviewed and signed-off before distribution to property sellers

Login to **Proplink** > **Current Listings** > select a property > **Activity** > the next screen will ask you if you want to "Print a Sales Person Report" click **Yes** if you want the contact details of Buyers to be returned or click **No** if you do not want the contact details of the buyers to be returned. If the Activity Report is going to the property seller always click **No**

To **'Print'** the Activity Report click the **'Print'** icon and select your printer.

To **'Email'** or to **'Save'** the Activity Report, click the 'Print' icon and the activate '**Print to file**'. In the '**Type**' drop-down-box select **PDF File**. Next to the '**Where**' box click the **...** button and select (or create) the destination folder in to which you want to save the Activity Report > **OK**
You now have a saved PDF File that you can attach to the email that you can send to the Property Seller.
To view a video of this task click here

CALL SHEETS

When a sales person registers a Buyer, that Buyer's Card will match that information against all of the possible properties fit that profile and return this result at the bottom of that Buyer's Card. Clicking the 'View List' button will return photos and details of all of those properties. Every day a sales person should return this information to 'zero', which means they are contacting all of their database (this contact can be SMS Text, Email or Phone Call or Letter).

Login to **Proplink** (as a Super User) > **Buyers** > **Print** > **Call Sheets** > **Print** will return a report highlighting every sales person and the Buyers they have that potentially match either Current LIstings or Shared Listings in your company database. When a sales person is on top of their Buyer's Database they should have 'zero' Buyers returned.
To view a video of this task click here

MORTGAGE ORIGINATOR'S REPORT
If you are using the Multilink 'Virtual Personal Assistant' service you will be receiving daily updates from your Mortgage Originators. These updates will include - further qualification of the buyers, email addresses, more contact phone numbers, their status as 'Potential Sellers' etc. The 'Successful Mortgage Sales' made during the week should be highlighted at the sales meeting. All reports from the 'Virtual Personal Assistant' service will be submitted to your office via Email.
To view a video of this task click here

EXTERNAL SALES RESULTS
Every week each 'Area Manager' should address the sales meeting and update them on all properties sold in their allocated trading area. These sales may also include sales made by other agents (if you are using the Proplink 'Sales History' downloads. To produce this report:
Login to **Proplink** > sales History > **Search** dates required > **Print** > in "**Which Properties**" frame activate **'All'** > in "**Print Format**" frame select the type of report you require (suggest Catalog) > in "**Sort By**" frame > select the sort by type you require (suggest Map Reference - so that each "Area Manager' can explain to the meeting what happened in their allocated area).
To view a video of this task click here

1.6.3.13 Cloning a Property

Cloning is used to copy an entire record including all of its photos. This function can be used when listing a project such as a block of apartments. Many of the units will be identical in plan and style with perhaps just a price variation. Another time this function can be used is when a Sales History property is being relisted after several years. Again you may have a listing in your database which represents several properties. Example Apartments 1-3 and 5 are all-identical and are all the same (or similar prices). When one of them is sold, simply clone the record and save the Clone as Sold. This means you do not disturb the Property Activity Report for the other remaining apartments etc. will find many other times when Cloning will save lots of time.

Login to **Proplink** > **Current Listings**, **Potential Vendor** or **Potential Landlord** or **Sales History** button > Highlight the property to be Cloned > **Save** > **Clone** > **Save** the Clone wherever you require
To view a video of this task click here

1.6.3.14 Internet - S32 download

Enable potential purchasers to download their own copies of a Section 32 directly from the Internet

Scan the paper S32 received from the solicitor > **Save** the scan as a .pdf file > file size must be under 400K >a large S32 may need to be saved as several .pdf files > login to **Proplink** > **Current Listings** > highlight the property to which you want to attach the S32 > **Details** > click on to the 'Attachments' tab > **Attach** > locate the saved .pdf S32 file > **Open** > **Save** > **Current Listings** > **Exit** > **Maintenance** > **Transfers** > **Transfer** To view a video of this task click here

1.6.3.15 Registering Attendees from an Open House

Any attendee at an open house must be first treated as a 'suspect'. They become a 'Prospect' after they have been qualified. Sometimes it is too busy at an open house to qualify them. In this case a follow-up phone call must be made so that they can be qualified. **Proplink only accepts the registration of Qualified Buyers** . Sometimes an attendee at an open house is searching for a property in another price range. To record this attendee in the Property Activity Report for the open house and to register them as a buyer in their correct price range

Login to **Proplink > Buyers >** complete the buyers details inserting their correct price to > if the open house property is not returned as an option when you click the **View List** button **> Search** button **>** insert the address of the open house **> Done** button **>** when the open house property is returned **> Inspected** button **>** follow the prompts.To view a video of this task click here

If a snoopy neighbour attends an open house and you want to record their attendance but do not want to register them as a Buyer

Login to **Proplink > Current Listings** button **>** select the open house property by clicking on to it **> Activity** button **> Add** button **>** Insert the snoopy neighbours name **> Inspected** button To view a video of this task click here

1.6.3.16 Pay Day

On pay day for the Sales Team it is time to move commissions from the **Trust Account** to the **General Account** and to **Draw** the **Commissions**.

1. Login to **Money** > **Sales Exchanged** > Select a 'Settled Property' address by clicking on to it > **Drawn** > enter the date > Select the next Settled Property address by clicking on to it > **Drawn** > enter the date > Repeat process as required. To view a video of this task click here

2. Draw a cheque for the amounts Drawn in the Trust Account
   Login to **Money** > **Trust Account** > **New** > Insert the Date > select **'Debit'** from drop-down-box **(*** make sure the Debit Number that is returned corresponds with your Trust Account cheque number)** > Insert the name of your Company General Account > Insert the Gross Amount of the Cheque > **Splits** > Double Click the **'Category'** box > activate **From Existing Ledgers** > locate the property address of the first settled property > in the **'Memo'** box insert what the payment is for (e.g. 'Sales Commission', 'GST', Management Fee', Advertising', 'Debits Tax', 'Letting Fee' etc.) > insert the amount > **Save** > **New** (you will be told that you are inserting a 'Duplicate Number' i.e. a Duplicate Cheque Number "are you sure?" answer > **Yes** (because you will be inserting several entries under this one cheque number) > Double Click the **'Category'** box > activate **From Existing Ledgers** > locate the property address of the first settled property > in the **'Memo'** box insert what the payment is for (e.g. 'Sales Commission', 'GST', Management Fee', Advertising', 'Debits Tax', 'Letting Fee' etc.) > insert the amount > **Save** > **New** (you will be told that you are inserting a 'Duplicate Number' i.e. a Duplicate Cheque Number "are you sure?" answer > **Yes**
   Repeat the above process until the **'Splits Total'** balances with the **'Transaction Total'** at the bottom right hand side of the **Splits** screen > **Exit** > **Save** To view a video of this task click here

3. **Prepare a Commissions Drawn report for the Sales Person**
   Login to **Money** > **Commissions Drawn** > **Summary** > activate '**Commissions Drawn**' > activate **Salesperson** > click the drop-down-box button and select the sales person > activate '**Drawn Date**' > click into 'Drawn Date' box and insert the date from the last 'Pay Day' to 'Today' > **Done** > **Advert** > returns the Advertising Summaries between the selected dates > **Print** > returns a Statement of

the Commissions drawn between the selected dates To view a video of this task click here

4. **Prepare an Awaiting Settlement report for the Sales Person**
Login to **Money** > **Commissions Drawn** > **Summary** > activate **'Awaiting Settlement**' > activate **Salesperson** > click the drop-down-box button and select the sales person > activate '**Drawn Date**' > click into 'Drawn Date' box and insert the date from the last 'Pay Day' to 'Today' > **Done** > **Advert** > returns the Advertising Summaries between the selected dates > **Print** > returns a Statement of the '**Commissions Awaiting Settlement**' between the selected dates To view a video of this task click here

The sales person now has a Commissions Drawn Report and an Awaiting Settlement report.

This program also enables you to create a **Commissions Earned** report between any two dates (either 'By Sales Person' or 'By Office')

5. Enter income from the Trust Account into the General Account

1.6.3.17 Working with the General Account

Working with the General Account is very similar to the Trust Account

To record a Deposit
Login to **Money** [must be a 'Super User'] > **General Account** > **New** > Insert the Date [click on to the icon] > in the next column click on to the 'drop-down-box' and select 'Credit' [insert the Receipt Number > in the next column insert the names of the Payees > in the 'Deposit' column insert the amount of the deposit > 'Double Click' where it says 'Double Click' and insert the 'Category' against which you want to record the Deposit (you can set up your own Categories) > If a Deposit has several parts then do not click on 'Double Click', instead click Splits > Double Click in the 'Category' box as before To view a video of this task click here

All subsequent receipts will remember the previous receipt number

To record a Payment

Login to **Money** > **General Account** > **New** > Insert the Date > select **'Debit'** from drop-down-box **(*** make sure the Debit Number that is returned corresponds with your cheque number)** > Insert the name of the Payee > Insert the Gross Amount of the Cheque > If the Gross Amount represents several different payments > **Splits** > Double Click the **'Category'** box > select an existing Category or create a new one > in the **'Memo'** box insert what the payment is for (e.g. 'Advertising', 'GST', etc.) > insert the amount > **Save** > **New** (you will be told that you are inserting a 'Duplicate Number' i.e. a Duplicate Cheque Number "are you sure?" answer > **Yes** (because you will be inserting several entries under this one cheque number) > Double Click the **'Category'** box again > select the Category > in the **'Memo'** box insert what the payment is for (e.g. 'GST', 'Wages', 'Govt Tax', etc.) > insert the amount > **Save** > **New** (you will be told that you are inserting a 'Duplicate Number' i.e. a Duplicate Cheque Number "are you sure?" answer > **Yes**
Repeat the above process until the **'Splits Total'** balances with the **'Transaction Total'** at the bottom right hand side of the **Splits** screen > **Exit** > **Save** To view a video of this task click here

All subsequent cheques will remember the previous cheque number. A 'Direct Debit' is an amount directly debited from your General Account. A 'Direct Credit' is an amount directly credited to your General Account. An 'Xfer Credit' or 'Xfer Debit' is for Internal Journal Transfers.

Periodically the General Account must be balanced.

Login to **Money** > **General Account Reconcile** > does the Opening Balance Agree with Bank Statement? (if it is your first reconciliation and you do not want to include all of your previous ledges, you will need to run 2 General Account balances until all of the previous General Account ledges have

been closed) > insert the ending balance on your Bank Statement > **OK** > locate a payment on the left side of the screen > locate the corresponding payment on your Bank Statement > tick the Bank Statement > click that payment on the screen (a "c" will appear next to the payment). Repeat until all of the payments that have been cleared on the Bank Statement have been ticked.
If there is a payment on the Bank Statement that has not been included in the General Account or if a payment in the General Account needs to be altered > 'Right' click on to that payment > select 'New Transaction' (to add a record), 'Edit Current Transaction' (to change the existing details), 'Delete Current Transaction' (to delete the record). If you add or change a transaction you must Save the alteration before you exit.
When all **Payments** and **Deposits** amounts have been agreed the amount in the "**Difference**" box (located at the bottom right-hand-side of the screen) should return a **$0.00** amount > **Finished** > Make sure that the Balance Date is the last day of the month > **Print** a Summary Copy of the Report (the other reports mentioned are also recommended)

You will need to verify the figure contained in this **"Reconciliation Summary at (Date)"** report, against the Balances in all of your General Ledgers. The figure that needs to agree with the Balances in your General Ledgers, is the amount shown next to **"Register Balance as of (date)"** of your print out.

To obtain a print out of your Ledger Balances
Login to **Money** > **Ledgers** > insert dates in **'To'** and **'From'** date boxes > **Print**

When a Sales Ledger is finished and the Ledger Balance = $0.00 and the Ledger Amounts have been reconciled with the Bank, you can move that ledger into History Ledgers.

1.6.3.18 Emailing Activity Reports, Newsletters and Catalogues

Activity Report

Login to Proplink > **Current Listings** > Select the property for which you require an Activity Report > **Activity** > **Print** > The Activity Report will now feature in a Print Preview screen > click the **Print icon** on the Print Preview page > on the next screen click '**Print to File'** > in the **'Type'** drop down box select '**PDF file'** > to insert the file name in the **'Where'** box, click the **... icon** at the right hand side of the 'Where' box to locate the file in which you file all of your .pdf files > go to **Outlook Express** or whatever program you use to send your emails > create your email letter > attach this .pdf file > **Send**
To view a video of this task click here

Pictorial Sales Newsletter to Potential Vendors
Keep your Potential Sellers up-to-date with current market conditions by sending them monthly newsletters of your sales activity and prices achieved. To create the Pictorial Newsletter

Login to **Proplink** > **Sales History** > Search for properties sold in the last 30 or 69 days > this report prints 18 Thumbnail photos and Prices per A4 page > When the search is returned you can tailor the report by clicking on to a property and clicking the **Select** button and the repeating the process 17 more times > **Print** > activate **Selected** radio box in '**Which Properties**' frame and then activating **'Thumbnails'** in the '**Print Format**' frame > **Print** > click the **Print icon** and activate the '**Print to File'** tick box. In the **'Type'** drop-down-box select **PDF file** and in the **'Where'** box click the **...** button and save the file to a Newsletter folder > Create an email to one of your Potential Vendors in your email program and bcc all of your other Potential Vendors that have emails > attach the Newsletter file to the email > **Send** To view a video of this task click here

This Pictorial Newsletter Report .pdf can also be sent to your Printer who can place the information into a Pre-Formatted template and mass print it for hand delivery.

Catalogue

Login to Proplink > **Current Listings** > highlight one required property > **Select** > highlight the next required property > **Select** > repeat the selection process as required > **Print** > activate "**selected**" > activate "**Catalogue**" > **Print** > The Catalogue will now feature in a Print Preview screen > click the **Print icon** on the Print Preview page > on the next screen click **'Print to File'** > in the **'Type'** drop down box select **'PDF file'** > to insert the file name in the 'Where' box, click the **... icon** at the right hand side of the 'Where' box to locate the file in which you file all of your .pdf files > go to **Outlook Express** or whatever program you use to send your emails > create your email letter > attach this .pdf file > **Send** To view a video of this task click here

1.6.3.19 Internet - Publishing Price Range only or No Price quote

To publish a "Price Range" or "No Price" on the Internet

In Proplink add the price range in the **'Substitute Price Display/Range'** field. If you do not want to mention any price range simply insert 'Contact Agent' or 'P.O.A' in the 'Substitute Price Display/Range' field. To view a video of this task click here

1.6.3.20 Inserting your company logo into Proplink

Inserting your company logo in Proplink
D > **Proplink** > **Graphics** > scbbs2.bmp

1.6.3.21 Downloading Valuer General sales info into CMA

Downloading Valuer General's Sales History

Go to www.prism.vic.gov.au > insert your user name and password to access the Valuer General information > search information required > when search results are returned > Download > click "click here to download file" > Save > Save to Hard Disk > download the information on to your office computer (suggest you use the file name 'Valuer General' > Close > Close the Prism internet file as well > Login to **CMA** > **Import** > click 'Count' to see how many records currently exist in the database > make a note of the results > **OK** > Click 'Import' again > Prism > **OK** > go to where you previously downloaded the information (Valuer General) folder > **Open** > the information will now be downloaded into CMA > when import is completed check that the 'inserts', 'updates', and 'unchanged', balance with the number of records Prism said will be downloaded ("Errors" usually indicates the number of records received from PRISM that are not valid) To view a video of this task click here
The Valuer General's information is now in the CMA 'External' database and can be accessed for CMA reports.

The Valuer General download also contains the Buyers and Sellers information. You can access this Buyer and Seller information in two areas of the Multilink System.
Area 1
Start > **Multilink Systems** > **CMA** > Login to **CMA** > **Analysis** > activate **'Comparable from External'** > insert the search criteria > **Done** > **V/P Info.** You can copy this information from 'External Data Source' into Proplink's Sales History by clicking the **'To Proplink'** button
Area 2
Start > **Multilink Systems** > Login to **Presentations** > **Sales Directory** > click on to the letter you wish to send > **Listing** > insert your search criteria > highlight another address you require > **Select** > highlight another address you require > **Select** > **Preview** or **Print**.

1.6.3.22 Sending and Receiving Information

Login to **Proplink > Maintenance > Transfers > Transfer**

This Task allows you to

1. Electronically Send any Listings you wish to share with other offices
2. Electronically Receive Listings from Other Agents, Project Developers, New Home Builders etc.
3. Receive 'Activity Reports' from other offices in your network. Whenever you distribute a Current Listing to another office and someone from that office Introduces any of their buyers to that Current Listing this activity automatically recorded in that office and is returned to your office when you do your next Transfer.
4. Receive Sales History information for your Trading Area.

To view a video of this task click here

To control the information you wish to receive go to 'Receive Set-up' in your Proplink Manual. To control the information you wish to send go to 'Sharing' in the 'Add Property' section in the Proplink Manual

1.6.3.23 Laptop Timed Out

If the laptop times out . Connect it to the office network > log In **Tools** program (located in the Multilink Systems suite) click **Laptop Msg/Key** button. The office server will automatically reactivate the Laptop. You must be a Super User to enter the **Tools** program To view a video of this task click here

1.6.3.24 Creating an Open House list

After a Sales Meeting when the sales staff have scheduled their Open Houses for the next 7 days an Open House Report should be printed. This report can be put in the Front Window, published in the Company Magazine, posted on to the Internet, given out at Open Houses.
Before printing a report each property needs to be brought up-to-date.

Login to **Proplink** > **Current Listings** > **Details** > **Inspection** > **OFI Times**

An 'Open House Report' can be either a 'Catalog' or an 'OFI Report'. To Print either of these Reports Login to **Proplink** > **Current Listings** > **Print** > in the **'Which Properties'** frame activate **OFI** > in the **'Print Format'** frame activate **OFI Report** or **Catalog** > in the **'Sort By'** frame activate whatever you wish > **Print** To view a video of this task click here

You also have the option to include some or all of the properties that are in your Shared Listings database into the Open House Report.
If you do not want to include 'All' of the properties that are in your Shared Listing database, when asked the question "include Shared Listings?", you will need to activate the **Postcodes** button (before you print) and select the Postcodes that you want to include in the print out. To view a video of this task click here

1.6.3.25 Managing the Sales Activity Daybook

The Sales Activity Daybook can be found in the Proplink 'Stationery Cabinet' which is located in the Multilink System. To locate the Stationery Cabinet

Click **Start** (on the Microsoft task bar) > **Programs** > **Multilink Systems** > **Stationery** > **Proplink** > **Sales Activity Daybook.doc**

These activity pages should be always kept at the front counter and the sales team should insert their New Listings, Updates and Sales information here.

Every day this information should be added to Proplink and signed off.

1.7 Questions and Answers

A person who is logged into Proplink as a sales person can enter rental data but cannot view it once it is saved.
In Current Listings when the 'type of authority' is 'Rent' it goes into the rental database. To access this database you need to use the Rental User Name and Password. I would suggest that you register a generic Rental user with a user name such as Rent and a password of 11111. That way all of the sales people can also access the rental list by re-logging.

Commercial/Industrial rental data appears grouped with residential data. This is not satisfactory when producing or reading lists.
You can produce a Commercial Rental List by clicking Print then Stock Sheet and then selecting your name from the Salesperson button. Commercial Listings are produced separately when you print out a Stock Sheet. If you only want to print out the Commercial Listings on the Stock Sheet when the Print Preview of the Stock Sheet appears exit all of the pages unit the Commercial Listings appear in Print Preview and then click the print Icon. To view only the Commercial Listings on the Current Listings or Shared Listings screen click the Search button and then in the 'Property Type' combo box select Commercial/Industrial

The data entry screen should reflect the terminology used for rental property, i.e. landlord NOT vendor etc.
If you log in as a Rental User (as explained above) and place the information from the Rental database screens you will have the terminology you require.

If a property is both a sale and a rental does it need to be entered twice?
The answer is YES. However you do not have to key the information in twice. Once you have keyed in all the information that you need you click the Details button then click the Save button and save the listing as Current Listing. Then click the Details button again and then click the Clone button. This function creates an exact replica of the original information. You then change the "Type of Listing Authority' to Rent and save it as Current. This time the property information will be saved as a Current Rental property. You will now have one listing in sales Current Listings and one listing in rental Current Listings. Now both records can be managed separately.

There appears to be some issues with our administrator whom I believe is a "super user" but is not being able to view all properties. Similarly our Manager is not able to view records created by our administrator.
All users irrespective of whether they are Super user rights or Salesperson user rights can view <u>all</u> of the properties in Proplink under Current Listings and Shared Listings and Sales History. A person registered as a Salesperson can only view their own Buyers Cards and their own Potential Vendors. A person with Salesperson rights can print a list of All the buyers that every salesperson has registered if they want to produce a list of potential buyers at a Listing Presentation. In this circumstance the contact details of all of the buyers is deliberately omitted.
A Super User can view ALL of the Buyers and ALL of the Potential Vendors registered by every sales person in Proplink. The Super User status should only be used when the Super User requires <u>All</u> of the information from every sales person to be in one location at the same time. This is usually required when they are performing management tasks. Super Users who also act in the capacity of a Sales Person should also have a second registration in Proplink as a sales person to avoid confusing all of their sales person information with the records of all the other sales people.

When I Clone a Sales History property and then save it as a rental property the labels do not alter.
When you have logged in as 'Sales' the system assumes that you will be logging Sales Information only. When you login as 'Rent' the system assumes that you will be managing Rental Information only. If you are in the Sales mode when you change the property information to Rental Mode don't panic, it will be displayed correctly when you log-in Rental mode.

With regard to cloning data can this be also done from the rental input screen?
Yes

I want to send an 'Electronic Brochure' of a property but I do not want that property to appear on the Internet.

Make sure the only instruction that exists in the Distributor Section of the Sharing Page of the property listing says "Internet". The "Internet" refers to the Everywhere Electronic Post Office. The property information must be sent to the Everywhere Electronic Post Office before 'Electronic Brochures' can be dispatched to potential buyers. Having the property information at the Everywhere Electronic Post Office does not mean that the property will be published on the Internet.

I want to fax Activity Reports and Catalogues to my customers
You will need to install Fax Software> If you are working with Windows NT or Windows XP you will have it included

I want to email Activity Reports and Catalogues
Firstly you will need to convert the Activity Report to a .pdf file. To do this you will need to install Adobe Distiller which is a part of Acrobat Writer

I cannot send an Electronic Brochure from Proplink
Check that you have an email address registered in your Proplink User Information. You can only access this User Information in Proplink if you are a Super User.

I cannot send an SMS Text Message
You will need to open an account with Xacom

I want to put a 'Price Range' on the Internet, in my emails and in my Catalogues etc.
In Proplink add the price range in the 'Price Description/Range' field

Adjusting the Search Formula for Buyers and Properties.
When a Buyer searches for properties or when a Property searches for buyers there is formula that Multilink Systems uses. To easily understand this formula
Proplink. Click on to 'Property Showings'
Click 'All Current' button
Insert $100,000 in to the Price Selection and then click 'Done'
The price ranges returned on the next screen are a result of the formula that is in use.

To change this formula
Go to Tools in the Multilink software bundle located on the Task Bar.
Click 'Proplink Setup'
Click 'Search Property by Buyer' to adjust this formula
Click ' Search Buyer by Property' to adjust this formula.

How do I Back-up the Multilink System?
The Multilink System Validates the database at the same time as it is performing the Backup. This way no "bugs" can sneak in the Backed Up databases. Backups should be performed regularly. The procedure for a backup is as follows
Open Tools program located in Multilink software bundle on the Task Bar
Click 'Backup' button
Nominate the Folder you want the Backup to go to. (Preferably on another Drive to Proplink.) To create a Backup Folder, go to W'95 or Windows NT Explorer. Nominate D Drive i.e. if Proplink is on C Drive etc. Click File the Click New and then rename Folder 'Backup Monday'. You might also create 2 other Folders called 'Backup Wednesday and Backup Friday'.
Click onto the Databases you wish to back up. You can do this individually or nominate all of the databases by holding the 'Shift Key' down whilst you click onto each one.
Make sure you have the correct Backup Folder open and then click OK
Whilst the system is being backed up if the Validation detects an internal corruption it will cease the back up function and report the problem on the screen. At this point you should attempt to

Repair the corrupt database. You do this by
Clicking 'Validation' button
Nominating the Database you wish to repair

Clicking OK.
When the corruption is repaired then attempt the Backup again.

If the corruption cannot be repaired then your only option is to restore the last uncorrupted Database. You do this by
Clicking 'Restore' button. Locate the Restore Source. The last backup of the Database will overwrite your current corrupt database.

How often should you back up
Every day you should backup each database individually in a separate folder, so that you don't have to pay the price of overwriting every database should a corruption occur in just one database.

Validating a Database without backing up
Click 'Validation'
Nominate the Database you wish to Validate or nominate them all
Click OK

Upgrading Multilink programs from the Internet?
Open the Tools program located in Multilink software bundle on the Task Bar
Click 'Upgrade Utility' button
Nominate which Multilink Program you wish to upgrade (either one or several)
If for some reason Multilink needs to withdraw any upgrade then you can simply nominate to return to the Previous Version of that program.

Upgrading a new version of the software on to your Workstation or Laptop?
If your workstation has been allocated direct Internet Access you can update directly from the workstation using the Tools Program. If Internet Access is only through your Server then using the 'Tools Program' download the Upgrades to your Server.
From there copy Proplink Bin Directory from Server to Proplink Directory in Workstation or Laptop as follows
From Workstation or Laptop, find Server computer through Network Neighbourhood in Windows Explorer.
Find where Proplink is installed on the server eg C Drive
Find Bin under Proplink Directory
In the Bin Directory highlight the program you want to upgrade
If upgrading Proplink remember you must Copy the Transfer.exe, the Map.DLL, the Proplink.exe and Prop.pic.exe
Then in your workstation or Laptop paste the files in your Proplink Bin Directory.
They will overwrite the existing files.

Downloading the Homeowners Directory for my area?
Open the Tools program located in Multilink software bundle on the Task Bar
Click 'Load Utility' button
Click Homeowners
Nominate the Postcodes you require
Click OK

Inserting extra maps into my database?
Open the Tools program located in Multilink software bundle on the Task Bar
Click 'Load Utility' button
Click Map
Nominate the Maps you require. Then nominate the sections of each Map. Sydney and Melbourne maps are divided into 6 sections per page.
Click OK

Inserting your own Local Area Street Maps into your Database
Multilink is equipped to provide Street Maps for every part of Australia (Both Cities and Country

Towns) A user can set-up their own database of Local Maps for their Local Trading area by Opening the Tools program located in Multilink software bundle on the Task Bar. Then click Proplink Setup

Downloading Photos and Floor Plans and Valuer General information from Head Office into my computer?
Opening the Tools program located in Multilink software bundle on the Task Bar. Then click 'Load Utility' button.

Sending Buyers to the Mortgage Originator
In the Proplink Transfer program > Click on to Send Buyers. The system remembers which buyers have been sent and will not send them a second time. The software at the Mortgage Origination end will also only receive the buyer's details once (from the office that sends them first).

How do I upgrade the Tools program?
Close Tools program. Open Proplink. In Main Menu click Maintenance then Click Upgrade Tools button then click OK button.

How do I upgrade my workstation?
If your workstation is configured to have direct Internet access, use the Upgrade Utility in the Tools program. If your workstation does not have a direct Internet connection then using the computer that is directly connected to the Internet, download any of the Multilink programs. Once the Internet enabled computer has been updated follow the steps below
In Windows Explorer, go to Proplink and then Bin
Inside the Bin Folder you will find the .exe file for the program you want to update.
With the exception of Proplink, you simply **copy** the .exe file you require and **paste** it in your own workstation in the Proplink, Bin folder. Click on to the .exe file you want to upgrade and then click **paste**. It will then overwrite the existing .exe file that is already in your workstation Bin folder.
If you are upgrading your Proplink .exe you will need to copy and paste all of the following files Transfer.exe, Map.DLL, Proplink.exe, Proppic.exe

1.8 Email Report

To print out a report of the emails you have sent
Start Bar > **Multilink Systems** > **Reports** > **Email Report**

1.9 How do I?

Users Guide - Proplink

Creating a Catalogue

A Catalogue presents up to 7 properties per A4 page and contains a Photograph, Property Address Price, Map Reference and Advertising Copy for each property.
From Main Menu
Click **Current Listings** or **Shared Listings, or Sales History** button
Click on to a property
Click **Select** button
Click on to the **next** property
Click **Select** button again
(Repeat the procedure as many times as you wish)
Click **Print** button

Click **Selected**
Click **Catalogue**
Click **Print**

to print all properties into the same catalog click **Print**, click **All**, click **Catalogue**

Creating a Fact Sheet

A Fact Sheet is a detailed description of a property including a 6" x 4" photograph. It does not include the Owner's Details or Price. Used in Presentations or to give to Customers
From Main Menu
Click **Current Listings** or **Shared Listings** button
If Fact sheet required for Potential Vendor, Click **Potential Vendor** button
If you require Fact Sheets for several properties, Click on to a property
Click **Select** button
Click on to the next property
Click **Select** button again
(Repeat the procedure as many times as you wish)
Click **Print** button
Click **Selected**
Click **Fact Sheet**
Click **Print**
If you require a Fact Sheet for just one property, highlight the property by clicking on to it, then click **Print** then click **Current,** click **Fact Sheet** then click **Print**

to print a Fact Sheet for all properties click **Print**, click **All**, click **Fact Sheet**

Creating a Full Details Sheet

Includes ALL details of the property. This report is used by Sales or Rental Staff as an 'in field' reference.
From Main Menu
Click **Current Listings** or **Shared Listings** button
Click on to a property
Click **Select** button
Click on to the next property
Click **Select** button again
(Repeat the procedure as many times as you wish)
Click **Print** button
Click **Selected**
Click **Details**
Click **Print**

Creating a Stock Sheet

A condensed summary of Currently Listed properties either For Sale or For Lease. Your Current Listings and Shared Listings may be merged into one Stock Sheet if required.
From Main Menu
Click **Current Listings** or **Shared Listings** button
Click **Print** button
Click **Stock Sheet**
Click **Print**

Match Buyers with Sellers or Tenants with available Properties

Buyers or Tenants are automatically matched against properties in Current Listings and Shared Listings databases 3 ways. In **Buyers** the results of the matches are reported at the bottom of each individual Buyers or Tenants Card. To automatically match ALL your registered Buyers or Tenants against ALL your Current and Shared Listings in your database.
From Main Menu
Click **Contacts** button
Search for Buyers
Click **Print** button
Click **Call Sheets**
Click **Print** button

Registering "Lookers" and "Other Price Buyers" who attend an Open for Inspection

Not every person who attends an Open House can be classified as a Buyer. Some are just "Lookers". Some are also Potential Buyers for properties in other Price Brackets than the property they have inspected.

How do I manage these two situations and still include both the "Lookers" and "Other Price Buyers" in the Property Activity Report for the Open House?

With Lookers we want to include them in our Property Activity Report but we do not want to clog up our Registered Buyers database with their information.

To register a "Looker"

On Main Menu click **Current Listings** select property by clicking on to it.
Click **Activity** button
Click **Add** button
Add name of Looker
Click on **Introduced** or **Inspected**
Type in the name etc.
When completed click **Exit**
All the Lookers will be registered but not entered in the Buyers Table
To change an Inspection Result in the Activity report. Double click on the Result and select another Result

Registering a buyer who has inspected a property outside of their price range.

Register the Buyer in the normal way including their correct buying price in the "Price To" box. Once the Buyer's Card has been completed the correct number of Properties Found will be returned.

If the property a buyer inspected at an Open for Inspection is not returned in as one of the Found Properties after you enter their details

click **View List** button
Click **Search** button
In 'Search for Address' field type in the address of the property that was Open for Inspection then click '**Inspected'**. That buyer will now also be included in the Open House Property Activity Report
or simply click the **Done** button in the search screen to return all of the Current Listings and then click on to the property required and then click the **Inspected** button

Sending an SMS Text message

To send an SMS Text message from the Buyers or Tenant's Card

Click on the 'Properties' button > Select a property by clicking on to it. To select other suitable properties, hold the 'Ctrl' key down and click on to other addresses.
Click the 'Send' button > click 'SMS'. This task will return the default SMS text message. If you want to change the message you can do so. If you want to create a new default message (be careful that you do not delete the name and phone number of the sender).
The 'SMS List' button on each Buyers Card under the 'Details' tab will return a list of all the SMS Text massages sent to that buyer.

To send an SMS Text message from Current Listings

Click on to a property > click the 'Contacts' button > click on to a buyer's name in the index > To select other suitable Buyers, hold the 'Ctrl' key down and click on to other Buyer's Names > click the 'Add Activity' button > click the 'Send' button > click 'SMS' > A dialogue box containing the message to be sent and all of the recipients' names will be displayed > click the 'Send' button in the dialogue box to batch-send the message.

To send an Email Brochure from the Buyers or Tenant's Card

Click on the 'Properties' button > Select a property by clicking on to it. To select other suitable properties, hold the 'Ctrl' key down and click on to other addresses.
Click the 'Send' button > click 'eBrochure'.
The 'Email List' button on each Buyers Card under the 'Details' tab will return a list of all the eBrochures sent to that buyer.
To dispatch the eBrochures you will need to do a Transfer.
From Main Menu > Maintenance > Transfers > Transfer
Laptops cannot do Transfers. Do a 'Replication' first and then do a 'Transfer' from your Office Server

To send an Email Brochure from Current Listings

Click on to a property > click the 'Contacts' button > click on to a buyer's name in the index > To select other suitable Buyers, hold the 'Ctrl' key down and click on to other Buyer's Names > click the 'Add Activity' button > click the 'Send' button > click 'eBrochure' > click the 'Maintenance' button on the main Menu > Click the 'Transfers' button then click 'Transfer' button.

All SMS Messages and Email Brochures will be recorded in the Activity of a property.

Removing Buyers or Tenants from the Call Sheet list

Proplink will automatically remove any Buyer or Tenant from the Call Sheets report if they have been <u>Introduced</u> to or have <u>Inspected</u> that property. There are 2 ways to record your Introductions or Inspections
From Main Menu
Click **Buyers** or **Tenants**
Click the **Buyers** or **Tenants Name** (in the index at the RHS of the screen)
(When that Buyer's or Tenant's Card appears)
Click **View List** button
Click on to the returned Property Addresses
Click **Introduced** or **Inspected** Buttons.
OR
From Main Menu
Click **Current Listings** or **Shared Listings**
Locate the property address
Click **Buyers** or **Tenants** button

Click onto a Customers name
Proplink then returns a list of customers matched against the property.
Click **Introduced** or **Inspected** buttons
These actions also automatically create the Property Activity Report (See below).

Creating a Property Activity report

A Property Activity report is a list of all Buyers or Tenants that have been Introduced to or have Inspected a property. The report records the date and time of the Activity and the name of the sales person who generated the activity. The information on this report also includes Introductions and Inspections generated from other offices and also the number of Hits and Detailed Introductions generated by the Internet. A Hit means that that particular property was offered to a customer as a result of an Internet search. A detailed introduction means that the Internet Customer inspected that property in more detail by viewing whichever other photos, floor plans, locality maps you may have for that property.
The information on the Property Activity screen can be sorted Alphabetically or in Date order. You exercise these options by clicking the right hand mouse button.

From Main Menu
Click **Current** Listings
Select a property by clicking on to it
Click **Activity**
You can only edit the Notes field in this screen
Click **Print**
There are 2 different reports that can be printed:
Sales Person report will print the buyers that already inspected the property and include their contact numbers for sales staff to follow up.
Property Activity report will print a list of all the potential buyers that have been Introduced or who have Inspected the property.
See above for how to enter "Lookers" and "Other Price Buyers" on to a Property Activity Report

Emailing a Property Activity Report directly from Proplink to the Vendor

Select the property in Current Listings
Click **Activity**
Click **Print** button
A 'dialog box' will appear asking you whether the report is for a Sales Person
Click NO
Click the Printer icon
Tick the 'Print to File' box
In the 'Type' box select PDF file
In the 'Where' box click the … button and select the place you wish to file the report
Click OK
Exit back to Current Listing screen
Double Click on to the Vendor's Email Address to open Outlook Express
Attach the saved .pdf 'Activity Report' to the email
Insert the message in the email you wish to convey to the Vendor

Faxing a Property Activity Report directly from Proplink to the Vendor

On Main Menu click **Current Listings**
Click **Print** button
Click **Setup** button and change Printer to **Fax**

Exit back to Main Screen

Select the property you want by clicking on to it
Click **Activity** button
Click **Print** button
Click the **Printer** icon at the top of the screen
A 'dialog box' will appear asking you whether the report is for a Sales Person
Click NO
The Report will then be compiled
Click the **Printer** icon at the top of the screen
A fax dialogue box will appear
Follow the prompts

To print out a report of the emails you have sent

Contact Help Desk and we will send the .exe to you.

Sending or Receiving information to or from Other Offices and the Internet

Electronically send any Listings you wish to share with other offices, also Electronically Receive Listings from Other Agents, Project Developers, New Home Builders etc., as well as receiving Activity Reports on your Current Listings performed by other offices, Updates and Sales History information. To control the information you wish to receive See 'Receive Set-up'. To control the information you wish to send go to 'Sharing' in the 'Add Property' section
From Main Menu
Click **Maintenance** button
Click **Transfers** button
Click **Transfer** button depending on which function you wish to perform.
The **Transfer** function can be performed automatically during after hours by setting the Auto function (see Transfers)

Transferring a Current Listing to another sales person

Sometimes a property listing needs to be transferred to another sales person. This Transfer function is different to nominating another sales person to manage a listing (which is described under the Details section of Add Property).
From Main Menu
Click **Current Listings** button
Select the property by clicking on to it
Click **Details** button
Click on to 'Agent' Tab located at the top of the Details page
Click in to the "Lister" field on the Agent Details page
Select another name from the 'pop up' list supplied
Transferring a Buyer to another sales person
Sometimes a Buyer needs to be transferred to another sales person.
From Main Menu
Click **Buyers** button
Select the Buyer to be transferred by clicking on to the Customer's Name which is located in the Buyers Index on the right hand side of the screen
Click **Transfer** button
Select a new salesperson's name from pop up menu by clicking on to it.

Printing a List of your personal Buyers or Tenants

There are several options when printing a list of Buyers or Tenants. A Personal Customer List

contains ALL the Buyers or Tenants registered by the logged in person
From Main Menu
Click **Buyers** or Tenants button
Click **Print**
Click Personal **Customers List**
Nominate a Price Range
Click **Print**

Printing a List of all Registered Buyers or Tenants for a Listing Presentation

This command also includes the names of Buyers or Tenants registered by other sales staff but does not include the contact numbers of those Buyers or Tenants. This report is designed to be included in a Listing Presentation presenting to a potential client by demonstrating the numbers of potential customers there are in the company.
From Main Menu
Click **Buyers** or **Tenants** button
Click **Print** button
Click **'All Potential Customers'**
Nominate the price range on the screen
Click **Print**

Printing a List of Potential Vendors registered between specific dates

From Main Menu
Click Potential Vendors
Click Search
Insert dates

Finding Buyers or Tenants that might match a Potential Vendor or Landlord

Sometimes Potential Clients can be tempted to sell or Lease if you can produce a customer immediately.
From Main Menu
Click **Potential Vendor** or **Potential Landlord** button
Click **Buyers** or **Tenants** button

Withdrawing a property from Sale

From Main Menu
Click **Current Listings** button
Click on to the property to be withdrawn
Click **Details** button
Click **Save** button
Click **Potential Vendor** or **Potential Landlord** button

Deleting a property from Proplink

Property information is a valuable resource. Whilst a property may be withdrawn from sale it still may be a Potential Vendor or Potential Landlord for a later time. If the property becomes listed with another agent it still may be a Potential Vendor or Potential Landlord if that agent does not Sell or Lease it. Even if the property is Sold or Leased by another agent the information you are storing is a valuable resource in your Sales History database. Add the sale price when it is available then file information in Sales History
From Main Menu
Click **Current Listings**, **Potential Vendor** or **Potential Landlord** button
Click on to the property to be deleted

Click **Save** button
Click **Delete**

Cloning a Property

Cloning is used to copy an entire record including all of its photos.
This function can be used when listing a project such as a block of apartments. Many of the units will be identical in structure and style with perhaps just a price variation. Another time this function can be used is when a Sales History property is being relisted after several years. Again you may have a listing in your database which represents several properties. Example Apartments 1-3 and 5 are all-identical and are al the same (or similar prices). When one of them is sold, simply clone the record and save the Clone as Sold. This means you do not disturb the Property Activity Report for the other remaining apartments etc.
will find many other times when Cloning will save lots of time.

From Main Menu
Click **Current Listings**, **Potential Vendor** or **Potential Landlord** or **Sales History** button
Click on to the property to be Cloned
Click **Save** button
Click Clone

Recording a Sale or Lease

When a property has been Sold or Leased from Current Listings
From Main Menu
Click **Current Listings**
Click on to the property that has been Sold/ Leased
Click **Details** button
Click **Save** button
Click **Sold/Leased** button
Insert the required details
Click **OK**

Adding a property to Rentals

Proplink also manages Rental properties in the same way that it manages For Sale properties. See "User Set-up" in Getting Started for registering Rent users.
To file a property in the Rental database
From Main Menu
Click **Add Property** button
In the Authority Type combo box select '**Rent**'

Adding a New User to the Rentals

From Main Menu
Click **Maintenance** button
Click **User Information** button
Add a New User making sure their Rights say Rent

Knowing which Buyers or Tenants have not been contacted for any nominated number of days

From Main Menu
Click **Buyers** or **Tenants** button
Click **Print**
Click Num of Days List then nominate the number of days you wish the list to contain e.g. **21 Days**
Click **Print**

Remembering the last time that a Buyer or Tenant was contacted

Click the **Contacted** button on the Buyer's or Tenant's Card or
Their card will be automatically updated when you click 'Introduced' or 'Inspected'

Creating a Potential Vendor or Potential Landlord

From Main Menu
Click **Add Property** button
Complete whatever detail you know
Click **Save** button
Click **Potential Vendor** or **Potential Landlord** button

Adding Sales History or Leasing History information manually

Sales information or Lease Information automatically arrives from Proplink Current Listings when a Sale or Lease occurs. Sales or Lease information can also be downloaded in bulk on floppy disk from an external source. In Victoria this external source is either from the REIV or the Valuer General (see ***System Overview - CMA***). Outside Victoria phone Multilink for Details.

To input Sales or Lease information manually:

From Main Menu
Click **Add Property** button
Click **Details**
Insert Information
Save as **Sold**
When entering information manually it is advisable to 'tag' the source of information in the Features section of Property Details because at some later stage this information may also arrive from another source and you will need to perform some housekeeping to merge the relevant information into one record. When you click Sales History the screen that is returned is designed to display a summary of the most relevant information immediately. If a record is duplicated i.e. two records for the same sale have been entered from differing sources then typing the information source when you manually input a record e.g. "Auction Results (and the date)' will quickly alert the user as to the source of the information before them on the screen.
Adding Photos to a Sold Property
From Main Menu
Click **Sales History** or **Lease History** button
Click **Details**
Click **Pool**
See Adding Photos to a Listing in User Guide below
Save as Sold/Leased

Attaching Pictures To A Property Listing

Pictures can be attached to Properties at any one of four locations in the Main Menu of Proplink.
The 4 locations are in
Add Property
Current Listings
Sales or Lease History
Potential Vendor or Potential Landlord

You can attach a Locality Map from any of the same 4 locations in the Main Menu above mentioned above.

1. From Add Property
Click **Pictures** button
See Continue……… (Below)
2. From Current Listings
Select the property by clicking on to it
Click **Details** button
Click **Pictures** button
See Continue……… (Below)
3. From Sales History or Lease History
Select the property by clicking on to it
Click **Details** button
Click **Pictures** button
See Continue……… (Below)
4. From Potential Vendors or Potential Landlord
Select the property by clicking on to it
Click **Details** button
Click **Pictures** button

Continue ……….
Clicking the **Pictures** button will return the Picture Insertion screen displaying any pictures currently attached to that listing.
Click the **Pool** button to proceed to the Picture Pool of photos which have been down loaded from the camera and which have also been processed in the **Load Picture** program (See Maintenance) Select the photo you require by clicking on to it
Click **Cut** button, or if you wish to use that same picture again click the **Copy** button.
The screen will automatically return to the Picture Insertion screen
Nominate where you want the photo to go by clicking on to one of the 9 photo boxes (which will become highlighted after you click on to it)
Click the **Paste** button
You must describe the photo e.g. Front, Kitchen etc.
Click **OK**
The photo will be displayed in the nominated box
Click the **Pool** button to select another Picture from the Picture Pool
Repeat the procedure until you have all the photos you need pasted against the listed property.
Exit
Do not forget to save your work - Click the **Save** button

Attaching a Locality Map to a property

You can attach a Locality Map from any of the same 4 locations in the Main Menu above mentioned above.
To attach a Locality Map
Click the **Pictures** button
Continue…………
Click the **Maps** button. You will now go to the Maps Pool
The maps are numbered as per the Street Directory dividing the Street Directory in to 6 parts. Each part is then called T for Top, M for Middle and B for Bottom. The page is also divided in half and so the Top becomes TL for Top Left or TR for Top Right, ML for Middle Left, MR for Middle Right, BL for Bottom Left or BR for Bottom right. Select the appropriate Map by clicking on to it
Click **Copy** button
You will automatically return to the Picture Insertion page
Select one of the 9 boxes by clicking on to it

Click the **Paste** button
The system will automatically rotate to a Full View screen
Locate the property position on the larger screen
Click your cursor on to the position you require, then immediately click on to the **Mark** button
A red dot will appear on the screen in the position you have nominated

Don't forget to always save your information by clicking on to the Save button before you leave. You now have several choices as to where you can Save (file) the property information you have just created.

Photos attached incorrectly to the wrong Property

In Proplink
Click onto the property
Click Details
Click Pictures
Click on to the incorrect photo
Click Cut
This will automatically create two files in the Proplink > Temp directory

If you want to use the photos again

You will need to send these photos through the Proplink Process again to get the photos back into the Proplink Photopool
Click Start Bar
Click Windows Explorer
Double Click Proplink Folder
Double Click Temp Folder
The system creates 2 images for every photo. One is a jpg and one is a bmp.
The 2 files named 'Copy Temp.jpg' and 'Copy Temp.BMP' are the two photos that you have cut
Click on to Copy Temp.jpg and copy it
Open Proplink> Photobin folder and paste the Copy Temp.jpg file
Back in Proplink
Redo the Load Photos routine in Maintenance
The photo is now in Photopool ready for you to attach it to the correct property

If you want to cut several photos at the one time

After you have cut the first one from Proplink you will need to rename the Copy Temp.jpg and Copy Temp.bmp files otherwise when you cut the next one from Proplink it will overwrite the first file.

If you want to do something else with the photos e.g include them into an email

In your email click 'Attach' button
Open Proplink > Temp
Click on the Jpg file to attach

Downloading Photos from the Camera or Scanner into Proplink

From Windows'95 Task Bar
Click **Start**
Click **Programs**
Then locate the Camera Program
Open the Camera Program
Click **Camera**
View slides in camera
When the thumbnail photos appear on the screen nominate a photo by clicking onto it
When the photo is displayed on the screen double click the selected photo to open it
Click **File**
Click **Save As**

Change file type to TIF
Change Driver to C: (or to whichever Drive Proplink is located in)
In directories, double click onto C; (or to whichever Drive Proplink is located in)
Scroll to Proplink and double click on it
Scroll to Photobin and double click on it
Click **OK**. This will save the photo
Then click **File**
Click **Close** (to Close the photo). You will return to the screen with all the thumbnail photos.
Select the next photo by clicking onto it.
Double click to open the next photo and repeat the above procedure (the Proplink/Photobin file is now open and does not need to be reset again during this downloading session)
When all photos are saved, close Camera Program by clicking **File** then **Close** to return to Proplink.

Loading Photos into Proplink Photo Pool & then attaching them to a Property

This section details how to compress and load into the Proplink Photo Pool. To download pictures from your camera you must first use the camera program (see Camera Program User's Guide)
Login to **Proplink**
From the Main Menu click on **Maintenance**
Click on **Load Pictures**
Click on **Pictures Automatic**
After all photos have been processed
Click on **Exit**
Now that the photos have been processed, go to **Attaching Pictures to a Property Listing** (page 5-5) for instructions on how to attach them to a property listing.

Changing a property from Current Listing to Sold

In Current listings click on to the Sold Property
Click Details
Click Save
Click Sold
Insert the Sale Price
If the sale was made by a member of your sales team, click 'Internal'
Then nominate the sales person
If the sale was made by another agent, click 'External'
Insert what other details you know on the details page
Click OK
You can insert extra information at a later date. The Current Listing will now be found in Sales History

Helpful Keystrokes
Tab to move forward
Shift/Tab to move back
Ctrl/C to Copy
Ctrl/V to paste
Ctrl/X to Cut