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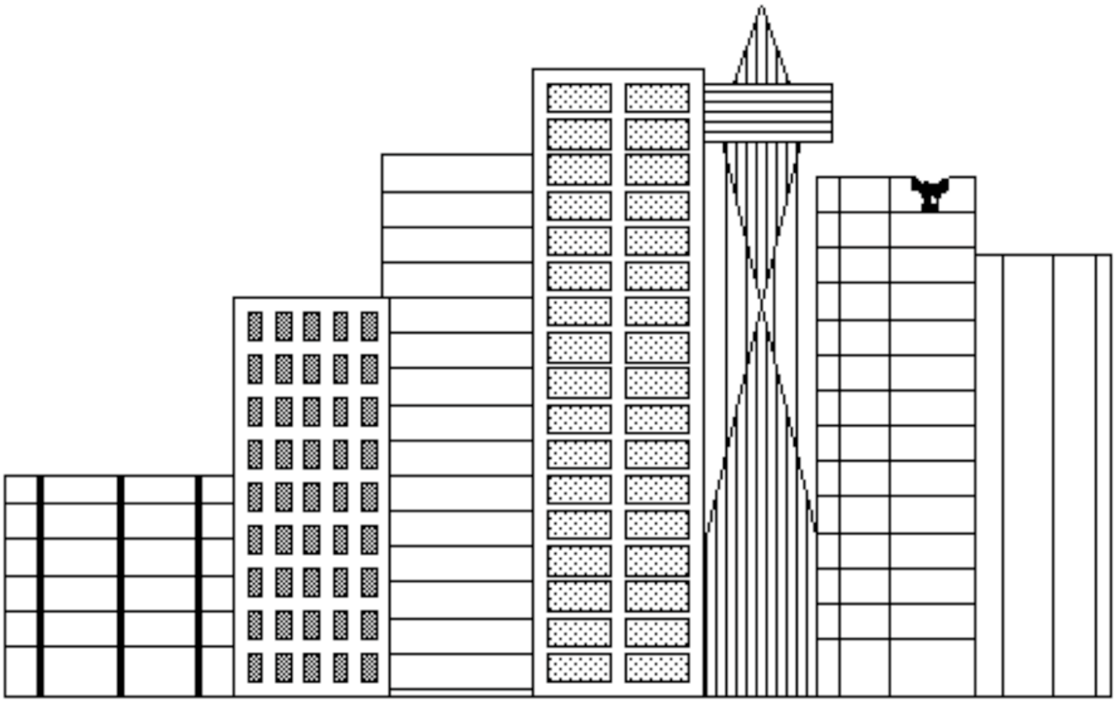

ListPro

Listing and Prospecting Database

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Real Solutions Listpro Database

Listing Book

The Real Solutions ListPro Listing book software is a database template designed around the Filemaker Pro program. The aim of the database is to keep a detailed record of all listings in the office and to use those listings to produce professional presentations of the property, current listing reports, salespersons activities and statement and all sales letters and advice's. All listings entered can then be published on your own web page.

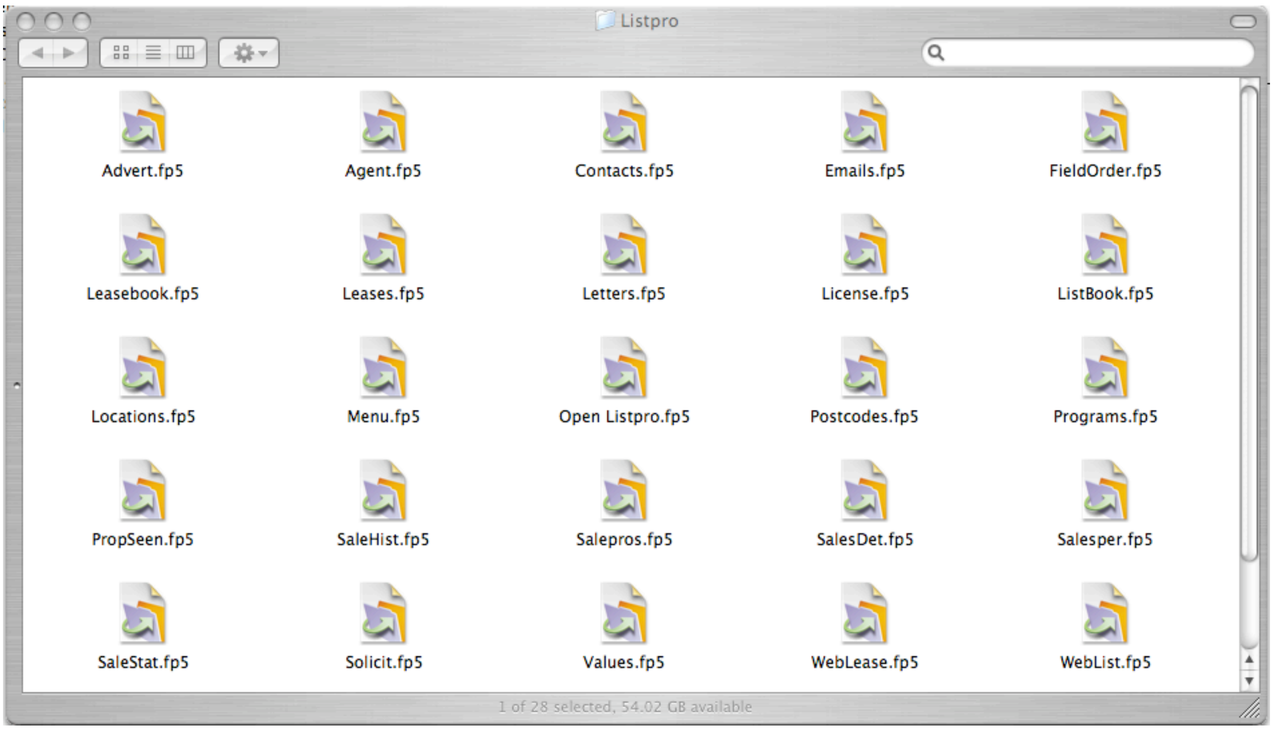
Sales & Prospects

The Real Solutions Sales & Prospects database is the next step after a property has been sold. A detailed sales register of properties transferred from the listing book that can be used for ongoing marketing to new vendors, historical sales analysis, and general mailing and letter writing functions to allow you follow up both vendors and other prospects.

The databases are available as unlocked templates so customized databases can be arranged.

There are 25 separate databases that make the ListPro system. Each of the databases forms an integral part of the overall software, each database being related to other databases in such a way as to make all information readily accessible in many different forms. When the **Menu** database is opened all of the related databases will be opened at the same time. This may take a minute or so to complete, but then all of the databases are ready for immediate use after they are opened.

When installed the databases may appear as follows in the Listpro window;



The sequence of the files may not be same on your screen, however the **Menu.fp5** file is the first one you should open each time on the local computer. If you are making shortcuts to open **ListPro** then make the shortcut to the **Menu** database. This will then open all other databases in the package.

When accessing Listpro over a network the computer that the database resides on must open the Menu.fp5 first which then opens all of the other databases. If you are using the **Filemaker Pro Server** product then this is done automatically when that computer is running. Either way the Listpro databases must be open on one computer before any other computer can access it.

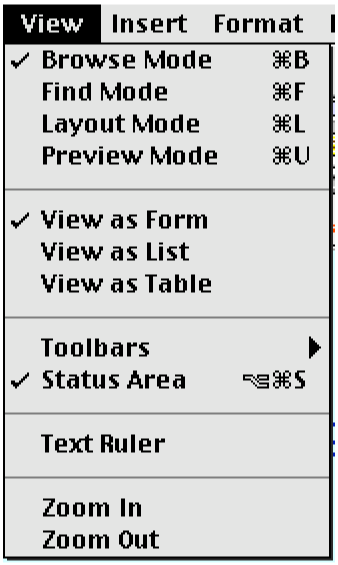
Once this is done then the **Open Listpro.fp5** icon shown above can be copied onto each of the other computers that will be using Listpro and it is this shortcut that must be opened on the other computers.

Using Filemaker Pro

What follows is a general description on how Filemaker Pro works. This only refers to the minimum details about Filemaker that are relevant to the Listing Book. For further more detailed information about Filemaker you should consult the Filemaker manual and work through the Tutorial section of that manual. This will give you a full understanding of Filemaker thus enabling you to undertake the more complex functions of changing layouts.
Windows/Macintosh Note - when the Apple symbol is displayed in the manual it is the same as the ⌘ key on the Macintosh keyboard, on a Windows keyboard it is the **Control** or **Ctrl** key which is the equivalent.

Menus

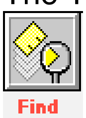
View Menu
The View Menu has four options that are important. The important part is displayed as follows;



The options on it are important to understand. Firstly the different modes of operation of Filemaker. The mode that is currently selected always appears at the bottom of the screen.

Browse The browse mode is the normal mode of Filemaker. When a database is opened it immediately goes into browse mode. In browse mode you can scan through records or edit them.

Find The Find mode allows you to find and search for records. In many cases a



button will appear on the screen that is the same as selecting the Find option on the select menu. If there is no Find button on the screen, then you can use the Select menu.

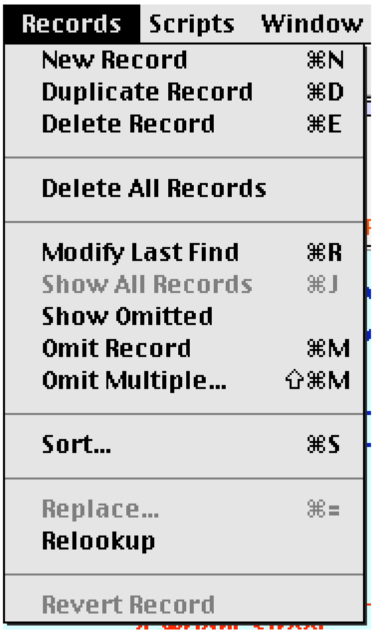
Layout The layout mode will let you into the designing side of Filemaker thus allowing you to alter screens and reports. This is only for advanced users and should never be used unless you have a current backup of your database.

Preview The Preview mode allows you to look at a report on the screen before printing it.

The remainder of the View Menu is not relevant to the Listpro database.

Records Menu

The Records Menu has some useful options on it as well.



Show All Records This is used to find all records in the council records and clears the Found Set.

Show Omitted This will find all records that were omitted from the previous find. So if your last find showed up 200 records out of 25,000, then **Find Omitted** will show up the other 24,800 records.

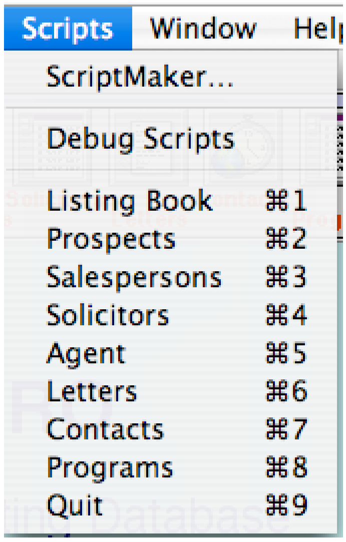
Modify Last Find This allows you to use the same find criteria that you last used but then change some details of it. So if you enter a detailed Find criteria based on a number of fields and it does nor produce the right result, then Modify Last Find can be used to display the same criteria again and then you may change some of the criteria such as expanding the price range or the date range.

Omit Record This is used to exclude some records from the Found Set before printing a list of records. Omitted records are not deleted from the database and can be displayed again by selecting **Find** or **Find All**.

Omit Multiple Can be used to **Omit** a number of records from the list.

Script Menu

The **Script** Menu is a list of shortcuts that can be used to access any of the options normally shown on the **Main Menu** screen.

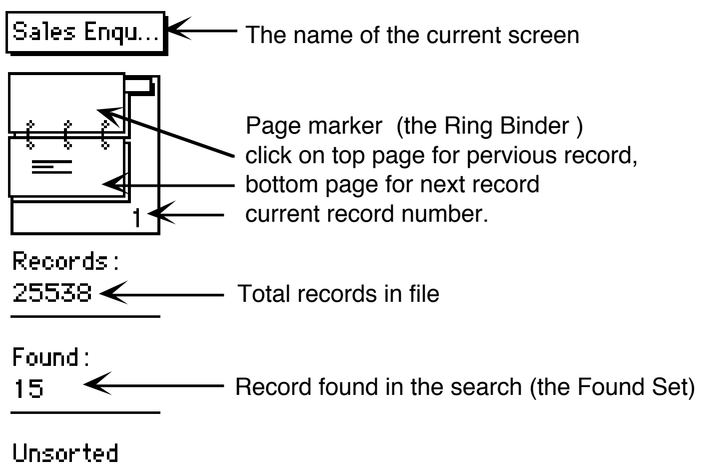


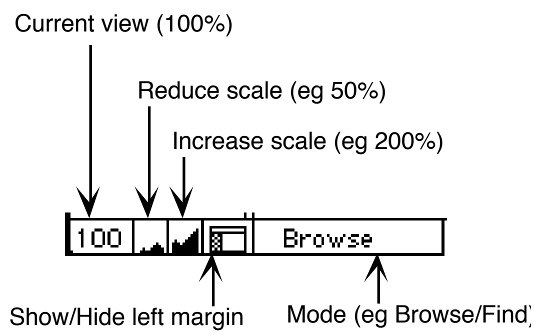
Not all options are available on this menu and you should rely on the **Main Menu** screen for a full list of options.

Screen Layout

The basic Filemaker screen has features such as the left margin and the bottom button panel that appear on all screens. These are described below.

On the left hand margin of the screen, an open book appears with the number of records in the database followed by the number of records found in this search. In the middle of the book is the current record number.





Down the bottom of the screen is the word Browse that indicates that you are in the browsing mode. Next to Browse is a miniature screen. By clicking on this screen, the left margin will disappear, leaving you with a full screen of information.

This is far easier to read as it contains more information. To display the record count again, simply click on the screen again and it will revert back to the original form.

To move from one record to the next, click on either the bottom page of the open book (to go forward) or the top page of the book (to go backwards). If the top or the bottom page is blank, then you have reached the start or the finish of the database. To go straight to a particular record number in the file, click in the middle of the book where the current record number is and enter a new record number.

The vertical scroll bar on the right hand side of the screen may be used to scroll up or down through the file as well. Click in the grey area beneath the elevator box to go down a page at a time, or click above the elevator box to go up a page at a time.

The horizontal scroll bar at the bottom of the screen may be used to move across and see the rest of the information on the screen. This screen is also used to print out a list of Recent Sales, so the information on the right hand side of the screen will be printed as well. Normally the most important information is displayed on the left side of the screen where it may be seen immediately, with the less important information displayed on the right where it can be scrolled across to or printed out.

Finding and Selecting Records

The method to find records is firstly to decide which screen is the best to use, for instance to find from a list of properties the use the List Menu screen, but as this has a limited number of fields to find on you may go to the Listing screen where you can find on more fields. The rule to follow for finding is that you can find on any field in any screen, there are no limitations.
The Find option may be selected from the **View Menu**, or in most screens there is a button that does the same job and should always be used in preference to the menu option. In addition the **Records** menu has additional Find options.
The options that may be used on the **Records** menu are **Modify Last Find**, **Show All Records**, **Omit Record**, **Omit Multiple** and **Show Omitted**.

Modify Last Find **R** Refind records using the last set of find information entered.

Show All Records ** G** Find and display all records ignoring last find instructions.

Omit Record ** M** Omit leaves out records from the list. So after finding a group of records, you may notice that some of them are not required in a report (e.g. council owned property) so you may click on the record and the Omit it.

Omit Multiple **^M** Omit multiple allows you to specify how many records you wish to leave of the list. So if a whole lot of properties are owned by the council and they all appear together on the list then Omit Multiple will leave out all of the records.

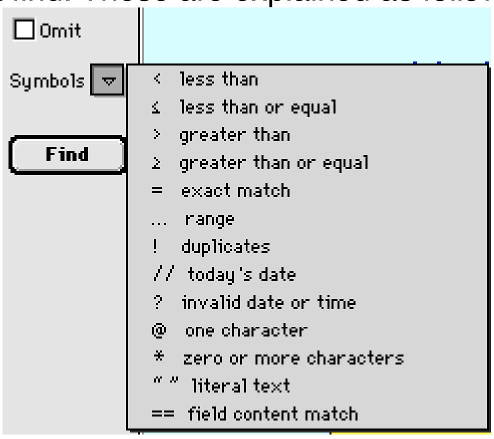
Records that are omitted are not removed from the file.

Find Omitted This will retrieve just the records that have been omitted.

Find
Select **Find** to initiate the finding of records. Tab to the field that you wish to find on and enter the data that the field should match. For instance to find all of the properties in Abbey Street, simply enter Abbey in the street field and press Return. All of the matching records will be found very quickly using this method.
More detailed finds may be entered by selecting all properties in Abbey Street that have been sold recently. In this case enter Abbey in the street field and then tab to the Listed Date field and enter >1/1/2002 or a similar date. Note that > is the greater than sign above the full stop on the keyboard.
Any combination of information may be entered in the fields to find matching records, but remember, the more fields you enter information into to be matched, the slower the find will become. If a find is taking too long then, press the □. (full stop) key sequence and the find will stop.
Multiple finds may be entered by using the ** N** (Apple key, Macintosh or Control key, Windows) or D key after each find, the difference being that **N** creates a new find request while **D** copies the previous request.. So enter the first set of find information, then press ** N or D** instead of Return and enter another set. Keep doing this until you have entered all the sets of information to be found and then press Return. This technique is useful for finding all properties

in Abbey Street **and** Brown Street **and** Smith Street etc. On some of the **Search** screens there will be a **Copy** button that will create an additional search request.
Remember that if you try and find a record by entering too much information in too many fields then big chance the record will not be found. Try and be brief in your find requests.
Secondly always remember whether you are in the Find mode or the Browse mode. After a find has been done, and if no record has been found, a warning will be displayed allowing you to cancel of Modify the Find. If you want to add the record in, then make sure you select Cancel first to stop the Find process then New to create a new record. If you select Modify Find and then select New then you are actually adding a new find request and when you have finished your record you thought you just added will not be there. Therefore when adding a new record, always make sure you are in the Browse mode.

If the left margin is showing during the find, then a number of symbols will appear. These symbols may be used during a find. These are explained as follows;



< less than. Amount to be found must be less than value entered i.e. <$200,000.

> greater than. Amount to be found must be greater than value entered i.e. >$100,000.

≤ less than or equal to. As above but may be equal to as well as less than.

≥ greater than or equal to. As above but may be equal to as well as greater than.

= equal to. Must be exactly equal to value entered.

... Between ranges. Must be between from and to range ie $100,000...$150,000.

! Duplicate records. Find all records with duplicate value in field.

// Today's Date. Find all records with today's date in field.

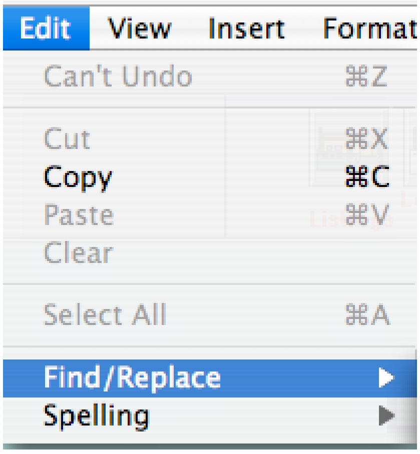
If none of these symbols are used in a find, then the information entered may be contained anywhere in the field, i.e. enter North and North Street, Northlands Avenue, Junction North will all be found.

Modify Last Find
This option will display the last set of find information entered and allow you to alter it or press Return to accept it.

Show All Records (Find All)
This will re-display all records in the database, thus allowing a new find to be performed or some other action to occur.

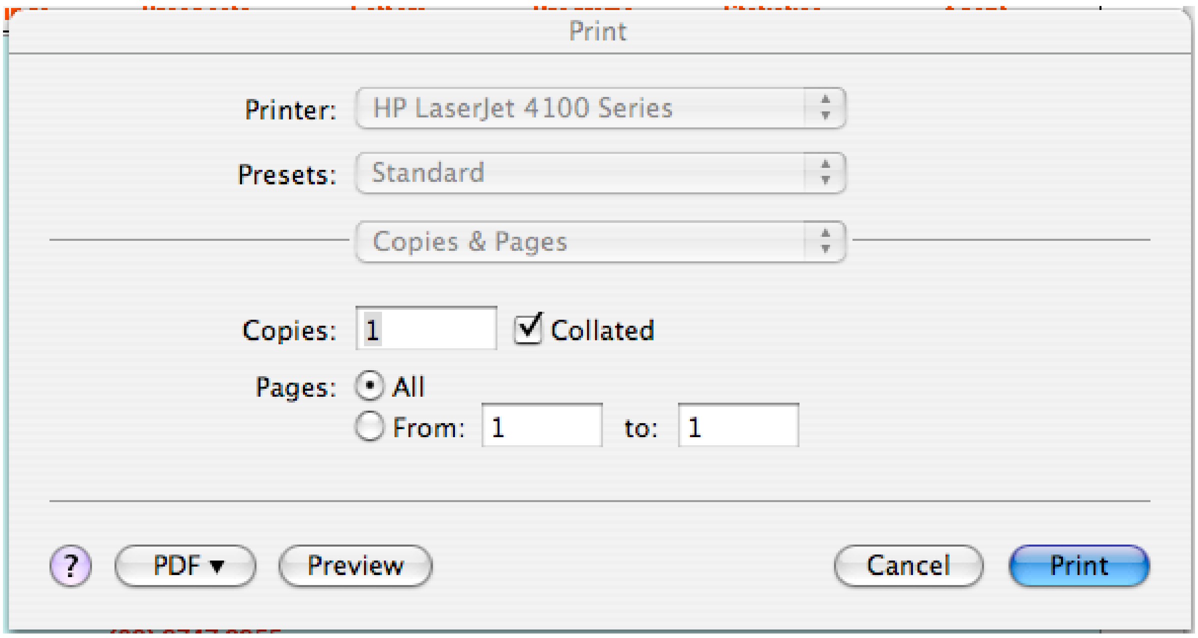
Other Options

The Edit menu has a number of options that are useful. In general though, if any of these options are required throughout the database, then a button has been made available so that you do not need to go looking for the option.
The Cut Copy and Paste options are the standard Mac/Windows options and are useful for copying information to the clipboard and pasting it into another area.



Print Dialogue (Macintosh)

Each time you select the print option/button the following screen will appear;



The main option to check on this screen is which records are to be printed. The **Records being browsed** option will print the number of records in the Found Set. The **Current record** option will print just the record shown on the screen at the time. Usually this is pre set by the program so that when you print a list, Records being browsed is selected. When you print a single Property File then Current record only is selected. You may change this if you wish, but be careful not to print hundreds of Property Files as each one takes up a page at a time.

Passwords

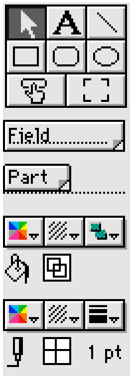
Passwords may be set into the program to prevent unauthorised access to your data, or to simply lock in the formats so they can be used but not altered.
This is the most typical use of passwords. You can design and alter the layouts within the system to suit your requirements, and then password protect those changes. Then any other persons or salespersons can access the layouts (window cards, brochures, letters etc) to print them out, but they cannot change the positioning and font style used within the layouts. This enables you to keep a consistent appearance for all documents produced by the system.

When the program ships, it is automatically password protected. The first thing you need to do is change the password from our standard one to one that you will remember. You may then add extra passwords for other users within the office as well.

Customizing Formats, Letters and Layouts

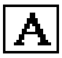
All customizing of the database should only be undertaken by suitably qualified or experienced people. In saying that, it is not difficult to perform minor layout and style changes and persons with a reasonable degree of computer literacy will find it both simple and lots of fun.
It is highly recommended that you have at least worked through the Filemaker tutorial prior to attempting to change any of the layouts in this database. In any case you should make a backup of the Listing Book before attempting to add or change letters.

Adding or Changing Formats
Go to the **Select** menu and select **Layout**. You are now in the layout and design mode. Note that in some systems we have set up, you will need to enter a password before selecting Layout. When the layout mode is selected a toolbox appears in the left margin.

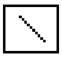


The tools available her are as follows;

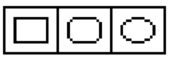
This is used to click and select an item to be changed, moved or formatted. Holding down the Shift key while clicking on objects will select multiple objects to be moved or formatted at the same time.



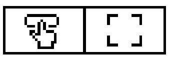
This is the text tool and is used to add or alter text on the layout.



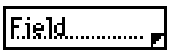
This is the line tool that allows you to draw a straight line. To make the line vertical or horizontal, hold down the Shift key while drawing.



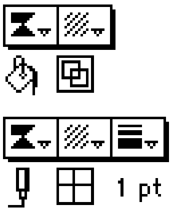
These tools are for drawing rectangles, rounded corner rectangles and circles. To make a perfect square or circle, hold down the Shift key while drawing.



Create a button and create a portal tool, only for advanced users.



Add a new field to the layout. Simply click and drag this icon out onto the layout and let go where you want it. A list of all available fields will be displayed. Select the field you want and it will appear on the layout. Then you can format it from the Format menu.



These are for colour selection, line width and fill patterns. Experiment with these after you have drawn a box, just to see what effect they have.

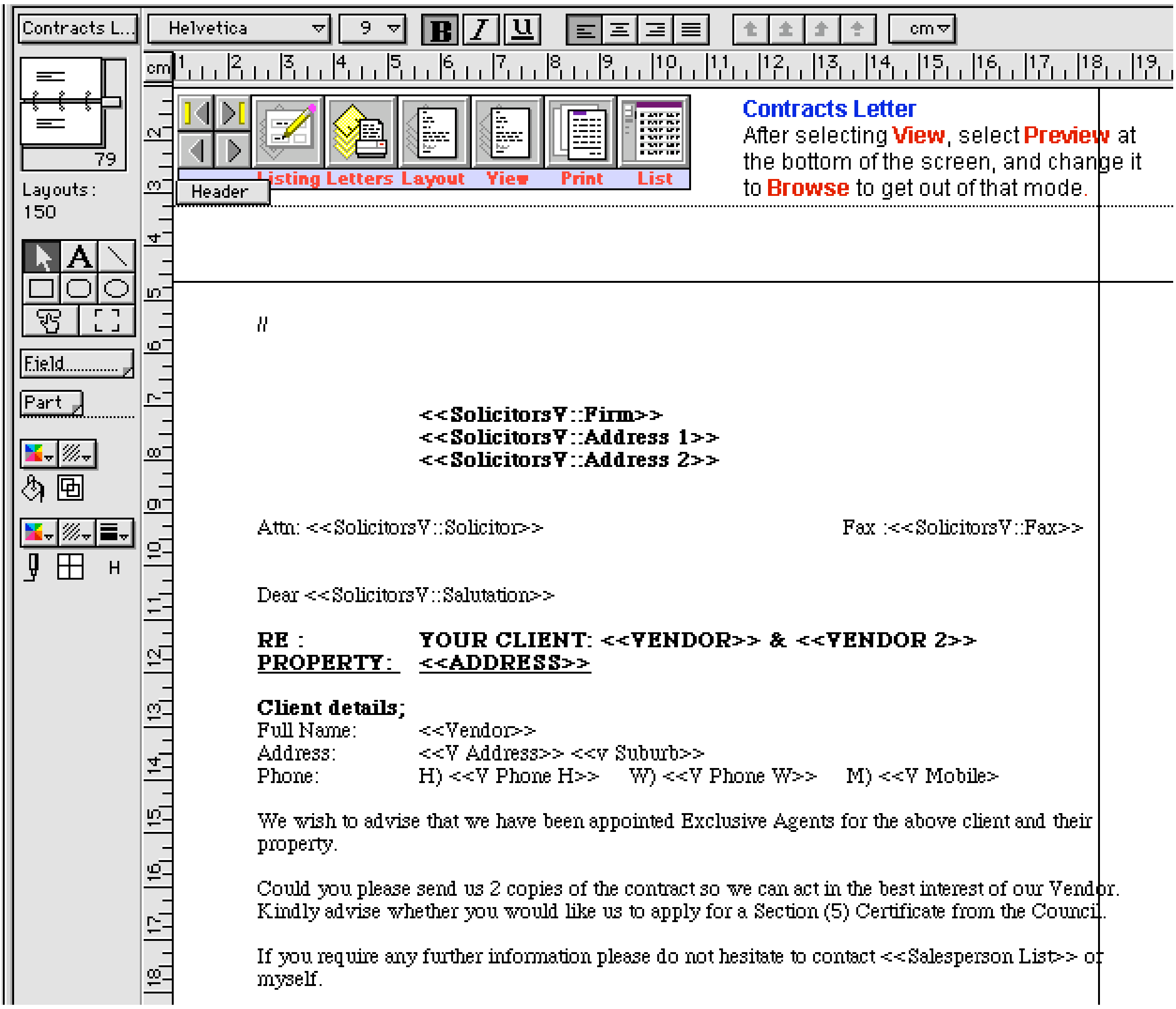
Customizing Letters

Now you know what the tools are, here is how we use them.

You must first select the letter you wish to change. You can do this by clicking on the current screen menu in the top left corner of the margin. Scroll down to the letter you want to change. Note that spare letters are called **Letter 1** to **8**. Sales letters are listed together as **Vendors Letter** etc. Consult the Letters flowchart to find the layout number of the letter that you want to change and then type in that layout number to find the letter (e.g. layout 79 is shown at right).

On the left side of the screen is the Toolbox and in the Toolbox is the **text tool A.** Click on this tool and you will now get the I beam text cursor. Move your cursor onto the name of the available letter e.g. Letter 1, and click in the middle of the name. Now go to the **Edit** menu and select **Select All**. The whole name of the letter will be selected. Now type in a name for the letter you wish to write. keep it as brief and simple as possible. When you have finished, go to the **Select** menu and select **Browse**. This takes you out of the layout and design mode and back into the data entry mode.

Now click on the name of the letter you have just changed, This will take you to the actual letter that is available for changing. The letter will be displayed as follows;



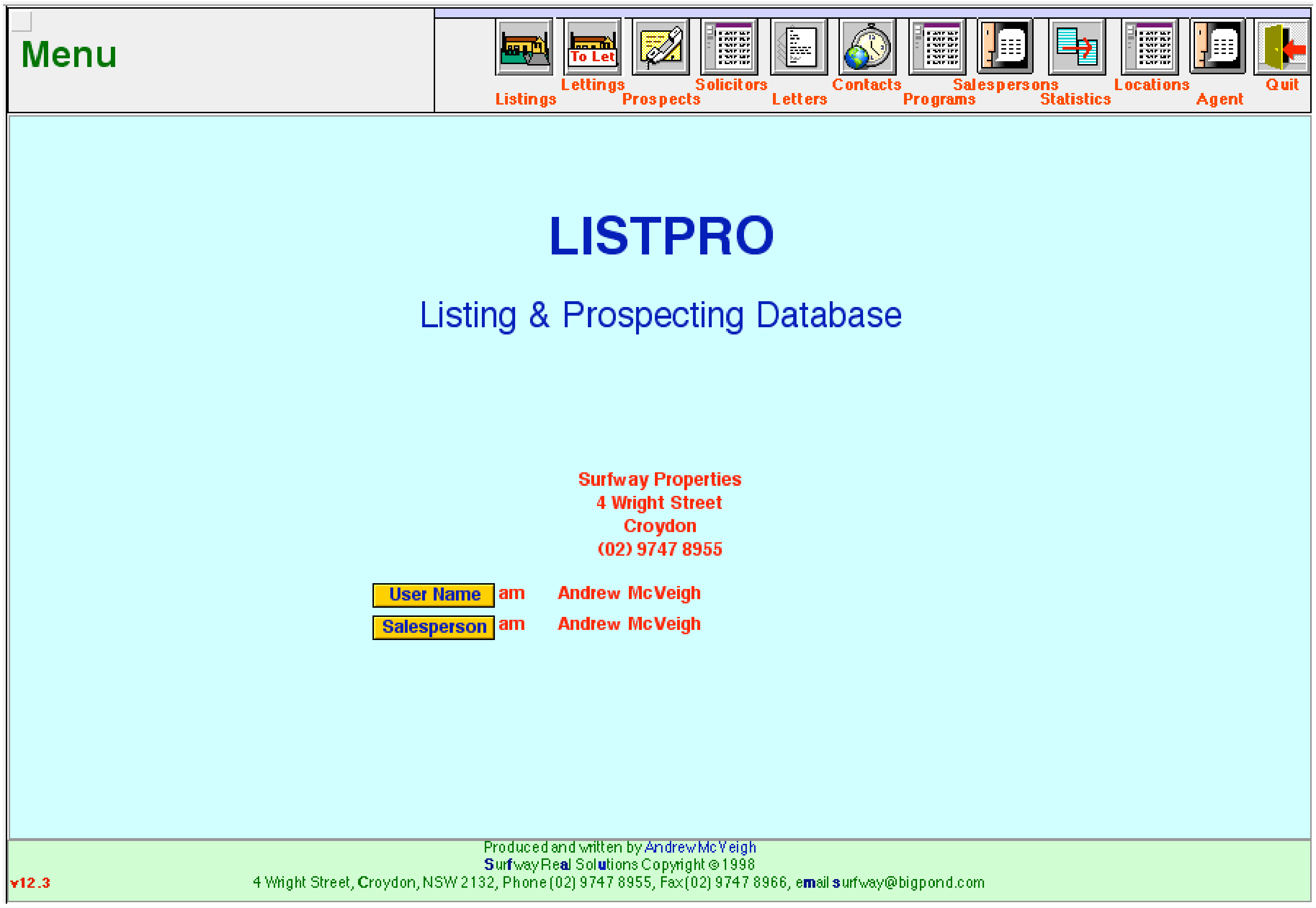
We now use the same method to change the content of the letter.

Firstly select **Layout** from the **Select** menu. Then click on the text tool **A** again. Now click in the middle of the letter where you are instructed to do so, **Select All** from the **Edit** menu, and start typing your letter in. You may use the **Format** menu to change Font types, sizes and styles as well as the alignment of the letter. The **Edit**, **Paste Special**, **Merge Field** or **Apple-M** (**Ctrl-M**) option is used to insert merge fields into a letter. merge fields are those shown as follows; **<<SolicitorsV::Address 2>>**.
When you have finished, go back into the **Browse** mode form the **Select** menu, and then click on the **Print** button and print a letter to the **Current record only** to check the letter out. You may change the letter again and again by using the above methods.

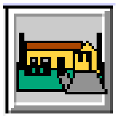
This method may be repeated until you have filled up all of the available letters on the Letter menu. If you require more letters, and cannot even re-use some of the existing ones, then call **Real Solutions** and we will update your system for you to include more letters.

Main Menu

Whenever you open the **Menu** database the following screen is displayed;

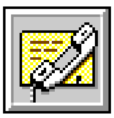


When the **Menu** is first opened you will be prompted to first identify yourself as the **User Name** for data entry and then the **Salesperson** if you are entering data on behalf of a salesperson. There is a 5 second wait loop to give you time to enter or accept the names that are highlighted. If you miss the time, then just click on either of the User Name or Salesperson buttons to change the salesperson. These names are used as defaults in the data entry process so it is a shortcut to registering the correct salesperson against any activities that may be entered.
To select any of the other databases click on any of the buttons at the top of the window.

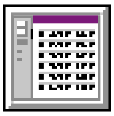


Opens the **Listbook** database for working with all Property listings.

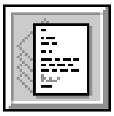
Opens the **Leasebook** database for working with rentals.



Opens the **SalesPro** database for working with Vendors and Prospects.

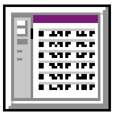


Opens the **Solicitor** database for working with Solicitors.



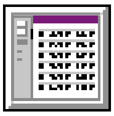
Opens the **Letters** database for working with Mail Merge letters.

Opens the **Contacts** database for working with all contact activities for vendors, purchasers and prospects.



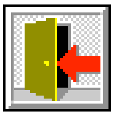
Opens the **Programs** database for working with your marketing programs.

Opens the **Salesperson** database for working with your Salespersons.



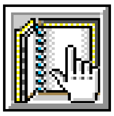
Opens the **Locations** database for adding all the suburbs/areas that you sell in.

Opens the **Agent** database for working with your office details, defaults and preferences.

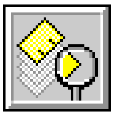


Quits or Exits from the database completely.

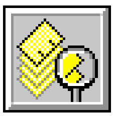
Other common buttons that appear throughout the databases are as follows;



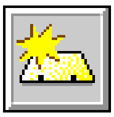
Returns to the **Menu** from any other database.



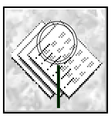
Selects the **Find** option to find any record in the database.



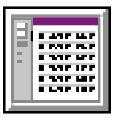
The **Find All** shows all records in the database.



Selects the **New** record options to add a new Listing, Prospect or other record.



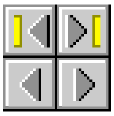
Selects the **Search** screen relevant to the database that is being used.



Returns to the **List** screen relevant to the database you are working in e.g., List Menu or Prospects Menu.

Sorts the listed record in ascending sequence depending on the field selected.

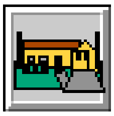
Will display more detail on the selected record.



These options allow you to move through the records in file, clockwise starting from the top left they are, **First Record**, **Last Record**, **Next Record** and **Previous Record**.

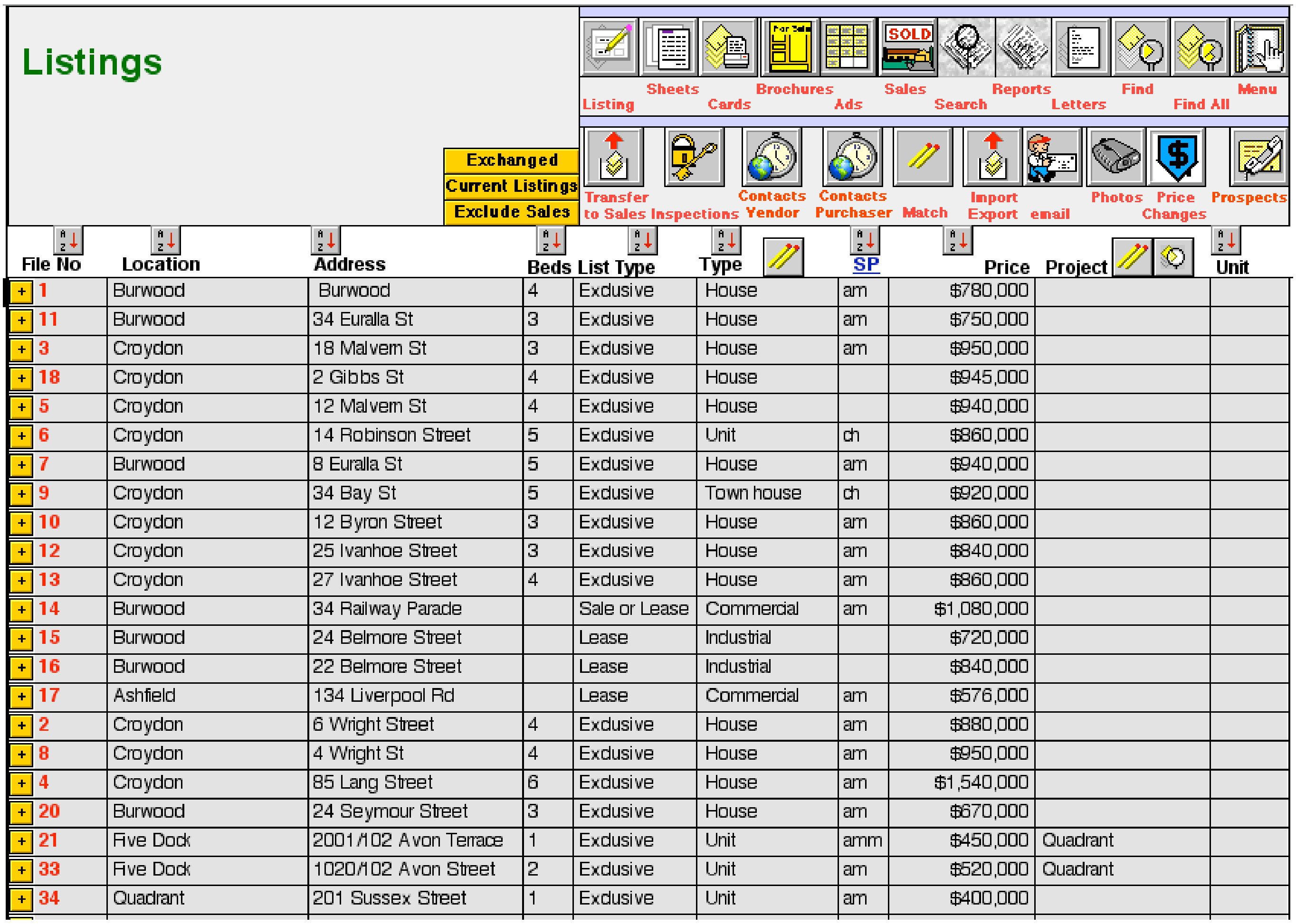
Type

Any text in blue and underlined is a link, usually to a definition of a lookup list.



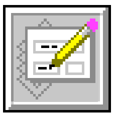
List Book

When selecting **Listings** from the **Menu** or any other databases the following screen is displayed. This will list all property listings that you have entered. .

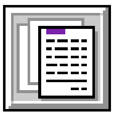


File No	Location	Address	Beds	List Type	Type	SP	Price	Project	Unit
1	Burwood	Burwood	4	Exclusive	House	am	$780,000		
11	Burwood	34 Euralla St	3	Exclusive	House	am	$750,000		
3	Croydon	18 Malvern St	3	Exclusive	House	am	$950,000		
18	Croydon	2 Gibbs St	4	Exclusive	House		$945,000		
5	Croydon	12 Malvern St	4	Exclusive	House		$940,000		
6	Croydon	14 Robinson Street	5	Exclusive	Unit	ch	$860,000		
7	Burwood	8 Euralla St	5	Exclusive	House	am	$940,000		
9	Croydon	34 Bay St	5	Exclusive	Town house	ch	$920,000		
10	Croydon	12 Byron Street	3	Exclusive	House	am	$860,000		
12	Croydon	25 Ivanhoe Street	3	Exclusive	House	am	$840,000		
13	Croydon	27 Ivanhoe Street	4	Exclusive	House	am	$860,000		
14	Burwood	34 Railway Parade		Sale or Lease	Commercial	am	$1,080,000		
15	Burwood	24 Belmore Street		Lease	Industrial		$720,000		
16	Burwood	22 Belmore Street		Lease	Industrial		$840,000		
17	Ashfield	134 Liverpool Rd		Lease	Commercial	am	$576,000		
2	Croydon	6 Wright Street	4	Exclusive	House	am	$880,000		
8	Croydon	4 Wright St	4	Exclusive	House	am	$950,000		
4	Croydon	85 Lang Street	6	Exclusive	House	am	$1,540,000		
20	Burwood	24 Seymour Street	3	Exclusive	House	am	$670,000		
21	Five Dock	2001/102 Avon Terrace	1	Exclusive	Unit	amm	$450,000	Quadrant	
33	Five Dock	1020/102 Avon Street	2	Exclusive	Unit	am	$520,000	Quadrant	
34	Quadrant	201 Sussex Street	1	Exclusive	Unit	am	$400,000		

The available options appear as buttons on the top of the screen. In addition the + button is used to display the full listing sheet for any of the listings. Many of the buttons are also available from the Listing Sheet window.

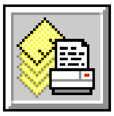


Listing Use this option to add new listings, alter existing listings or to remove listings. There are three separate listing sheet formats (Houses, Land or Rural) depending on the type of property to be listed. After selecting this option the selected Listing Screen will be displayed and you make a selection from the available buttons.

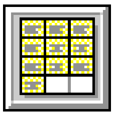


Sheets Use this option to print listing sheets for completed listings. There is a button on the **Enter Listing** screen that will do the same job. A menu selection of different listing sheets will be shown. (See Listing Sheets)

Brochures This option will display a further selection screen showing samples of the different types of brochures available to be printed. You may then select the brochure layout to be printed for the property. (See Brochures)

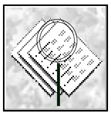


Cards This option will display a further selection screen showing samples of the different types of window cards available to be printed. You may then select the window card layout to be printed for the property. (See Window Cards)

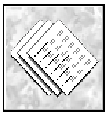


Ads This option is used to select the properties to be advertised or included in any of the many advertising layouts available in the database.

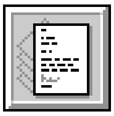
Sales This option is used to enter the details of a purchaser and sale to be included in a sales advise and sales letters that may be printed from the Sales screen.



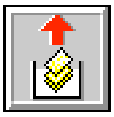
Search This option will display the search screen, from where you may enter details relevant to a purchaser’s inquiry and produce a list of properties that may be suitable. A further option is then to print the list.



Reports This option will display a further menu detailing the reports available in the database. Selections can be made from this list to print out all your listings in different formats and sequences.



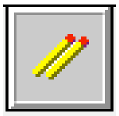
Letters This option displays a screen with a list of different letters that may be sent out to vendors. There are a number of spare letters that may be changed to be your own standard letters.



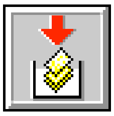
Transfer This option transfers the listing and new owners details to the prospecting database to add to the Sales Register and follow up list held in that database.

Inspections This screen allows you to detail any inspections on a property. The purchaser must be in the Prospects database before an inspection can be recorded.

Contacts **Vendor** or **Purchaser** This screen allows you to detail any discussions, notes, follow up **Programs** or diary activities that you wish to make about the vendor or purchaser. Both the Vendor and the Purchaser have a separate set of contact notes available.

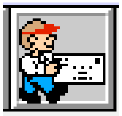


Match Match the selected property up with any potential purchasers.

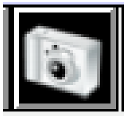


Import Export The import option allows listings to be imported from another database or from a mobile copy of the list book database.

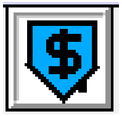
The export option allows listings to be exported to another database or a copy of the List book database. The two import and export options may be used to update a master database located in the office from a remote copy held elsewhere. The exported file may be emailed to the office and imported into the master database.



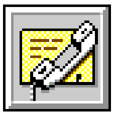
email This allows you to send emails to vendors and purchasers.



Photos This allows you to add photos for listings



Price Change This option will allow you to detail any price changes in a listing and is used in conjunction with the **Market Study** report to details the statistics behind each sale.



Prospects This option will take you to the Sales and Prospects database.

Exchanged

This button filters the list of properties so that only listings that have exchanged or settled will be shown.

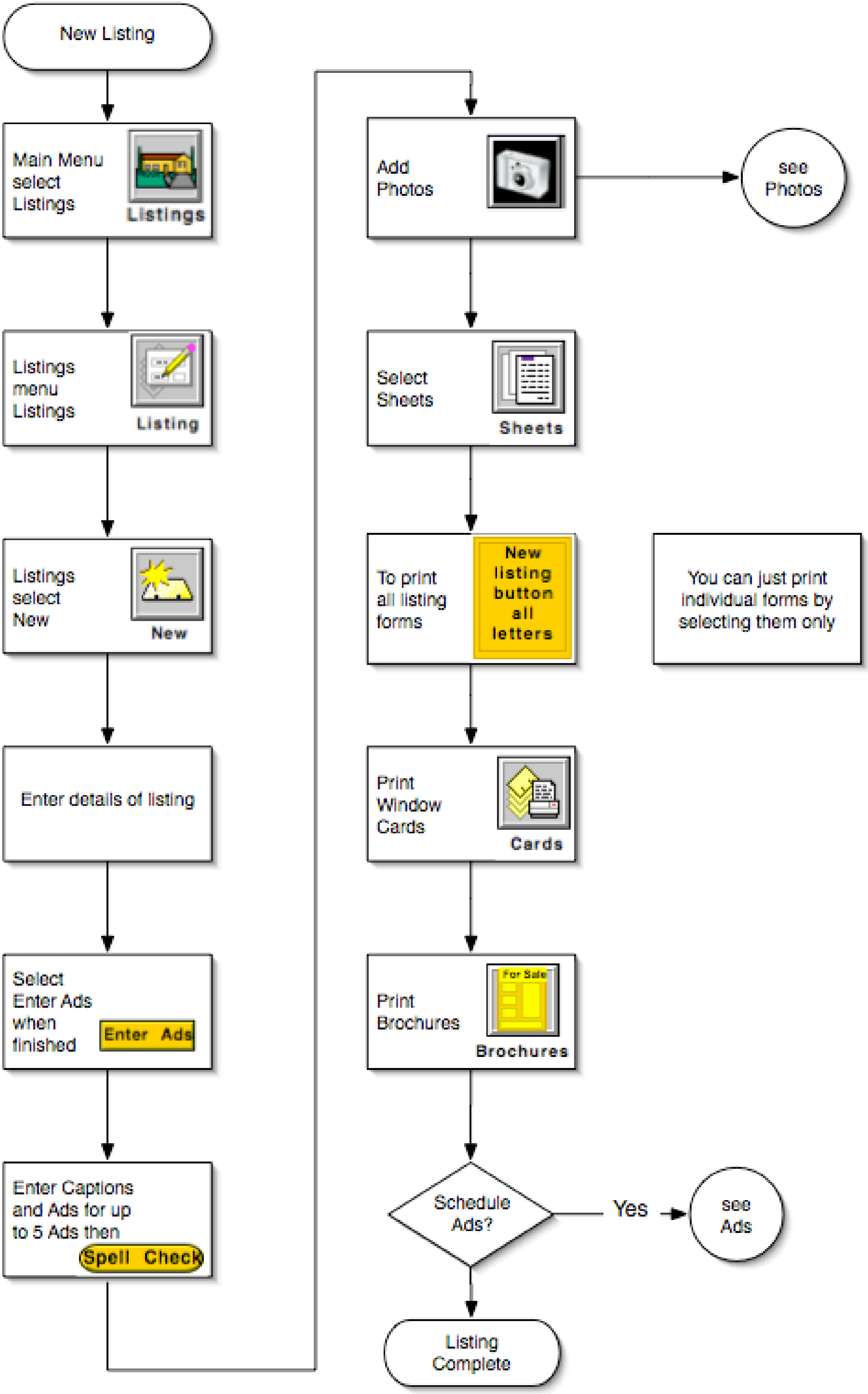
Current Listings

Will filter the displayed list to just current listings. This will exclude any sale that has had a deposit made to it and is in the Pending status or later in the sale process.

Exclude Sales

Does the same as **Current Listings** except that a sale must be exchanged and unconditional to be excluded. Deposits taken (Pending or Unconditional) are included in this selection. Make sure you select **Find All** before selecting this.

Enter Listing Flowchart

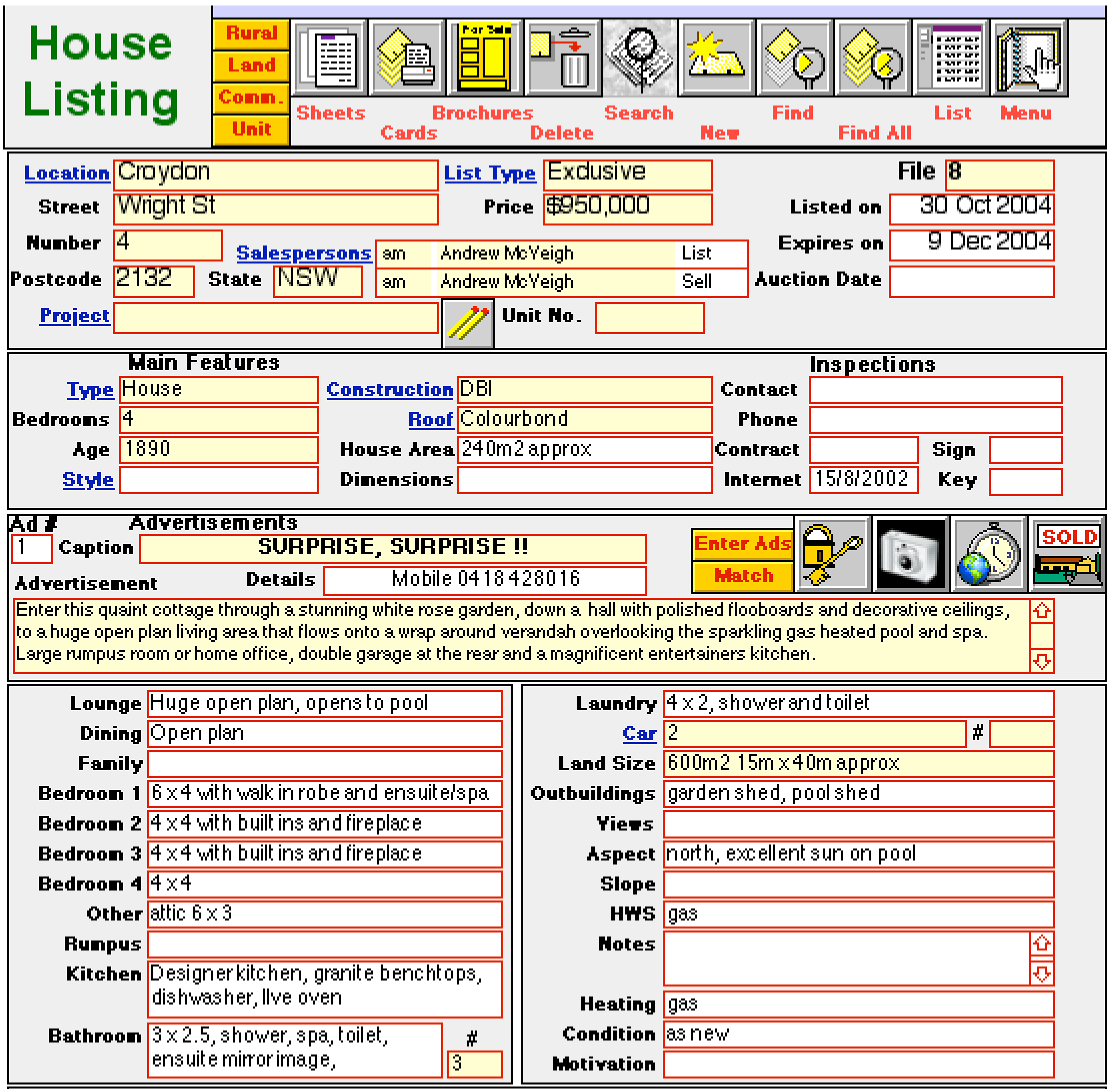


Enter Listing - Houses/Rural/Land/Commercial

The process of adding a listing contains the following steps;

1. Add the listing in Listing screen.
2. Enter the text of the ads for the listing
3. Add in the photos for the listing
4. Print of the Sheets that you require for the listing
5. Print Window Cards and Brochures
6. Schedule the ads and marketing program for the listing

The Listing screen is used to enter the details of each of your houses listed. It is also used to change any details of existing listings. While entering details of a listing, do not change the format, size or font of the text as you enter it, otherwise the text will not display correctly in other reports and windows.



Depending on which type of listing you selected (Homes, Land or Rural) determines which listing screen will be displayed. While the information is slightly different on each of the screens, the method of adding, altering and deleting listings is the same, therefore the details below will apply to all three types of listing screens.

Once this screen has been displayed, a panel of buttons is available at the top of the screen.

The functions of the buttons are as follows;

Rural — Displays the **Rural** listing sheet for farms and acreages.

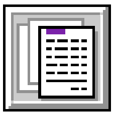
Land — Displays the **Land** listing sheet for vacant land.

Comm. — Displays the **Commercial** listing sheet.

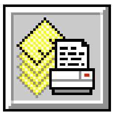
Enter Ads — Displays the Ad entry screen where all ads for the listing may be entered.

Match — Matches the selected property with any potential purchasers.

Prints an envelope for the person who the icon appears next to, either the Vendor, Purchaser or their solicitors.

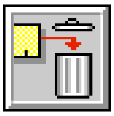


This button will display the **Print Listing Sheet** screen from where you can select the type of listing sheet to be printed.

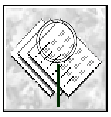


This button will display the **Window Card** screen from where you can select the type of Window Card to be printed.

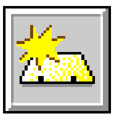
This button will display the **Brochure** screen from where you can select the type of Brochure to be printed.



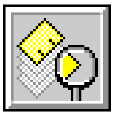
Use this button to remove a listing. Be careful about removing listings this way, particularly if the property has been settled. Always make sure that the salespersons figures have been updated and the sale has been transferred to the prospects file first. The **Transfer Sales to Prospects** process also has the option to delete a listing and it is better to use that option rather than the Delete button on this screen. This delete option can be safely used if the property has been withdrawn from sale rather than sold.



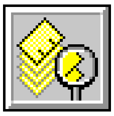
This button takes you to the **Search** screen so that a list of properties may be displayed and searched to meet criteria. This may also be accessed from the **Listings** screen and is the ideal way to find a list of properties that match a clients requirements.



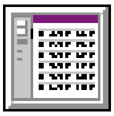
Use this button to start a new blank listing. Use the **Tab** key to move through the fields and enter data. Tab all the way back to the top so that the buttons come into view again.



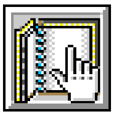
Use this button to start the find process. During a Find you can enter details into any field on the screen in order to find the required listing/s. The File No is the ideal and quickest field to find a listing on, however if you do not know the File No., then you may enter the street name, the street number and suburb in the respective fields to find the required listing. There is no limit to the number of fields you use to find a listing, but the general rule is the less fields the quicker the find.



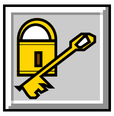
After a **Find** has selected a short list of records, the **Find All** option is used to show the full list of records again.



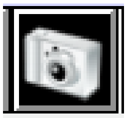
This button takes you back to the **Listings** screen where all of the current listings are displayed.



This button takes you back to the **Menu** screen where all of the other databases may be accessed.



This button displays the Inspections screen detailing all inspection entered against the selected property. Inspections are best entered from the Prospects database.



Displays the photo entry screen from where all photos can be attached and resized for the selected property.

This button will display the contacts screen for the **Vendor**.

Other Buttons

There are other buttons located on the listing sheet that may be used as well.

Location — This will display the **Locations** database allowing you to add edit or delete any suburbs, areas or buildings that you work in. This changes the drop down list that appears when you tab into the Location field.

Project — This will display the **Locations** database but limit the records to Project Sales only.

Salespersons — This will display the **Salespersons** file allowing you to add or alter a salespersons details before entering them on the listing. Each listing can have three salespersons involved, either two listers and one seller or one lister and two sellers or one lister and one seller. When you initially enter the listing you need only fill in the listers details, the sellers details may be entered on the **Sales Details** screen.

This will display the values in the drop down list for the following fields

[List Type](#)
[Type](#)
[Style](#)
[Construction](#)
[Roof](#)
[Car](#)
[Strata Manager](#)

Solicitors — When allocating a solicitor to the listing, you can access the full list of solicitors by clicking on this button, From there you can ad or alter the list of solicitors. On some versions of Filemaker you may have to close the list of solicitors and open it again before any new solicitors will appear on the drop down list. This appears to be a known bug in the Filemaker program.

Hot Links

Any word that is shown in blue and underlined is a hot link to a further option. If that word is next to a drop down list then it will display the possible values for that list such as Type for instance. Other hot links that are available are as follows;

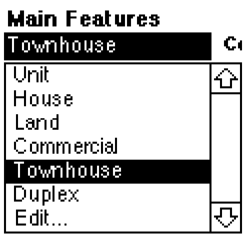
As above — Copies the Vendors name from the Inspect field, the phone number from the Inspect Phone and the address from the property address field, this saving some data entry. Make sure the full Vendors name is entered ready for the contract.

Phone H — Automates the dialing of the vendors phone number if the computer is connected to a compliant direct dialing phone system (TAPI compliant). This applies for Vendor and Purchaser Home, Work and Mobile numbers. Only works if a phone number is in the field.

email — Initiates an email to the Vendor or Purchaser using Microsoft Outlook, only if an email address is present.

Data Entry Techniques

Drop Down Lists



As you tab through the screen, some fields have drop down menus that allow you select from a number of options. You may select an option by either double clicking on it with the mouse, or by pressing the up and down arrows to move to the entry or press the first letter of the option. In both of these keyboard methods, make sure you press the **Return** key to register your selection.

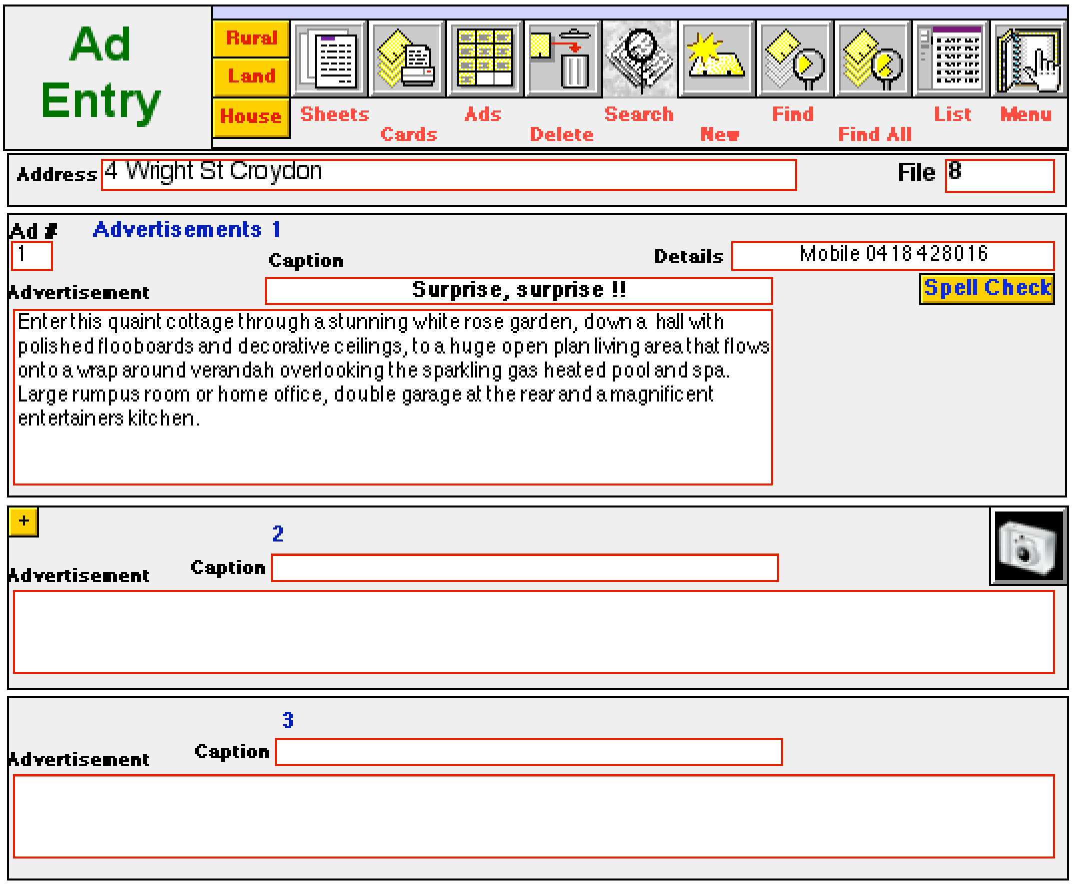
Some of the menus have an **Edit...** option at the bottom of the menu. Select the Edit option and you can change the items on the drop down list to be customized for your agency.

Menus without an edit option have a hotlink beside the description such as Type for instance, where clicking on the hot link word will display the

Values file along with the available options for this field. Extra options may be added in this screen. Further details on editing Values are found later in this manual.

Advertisements

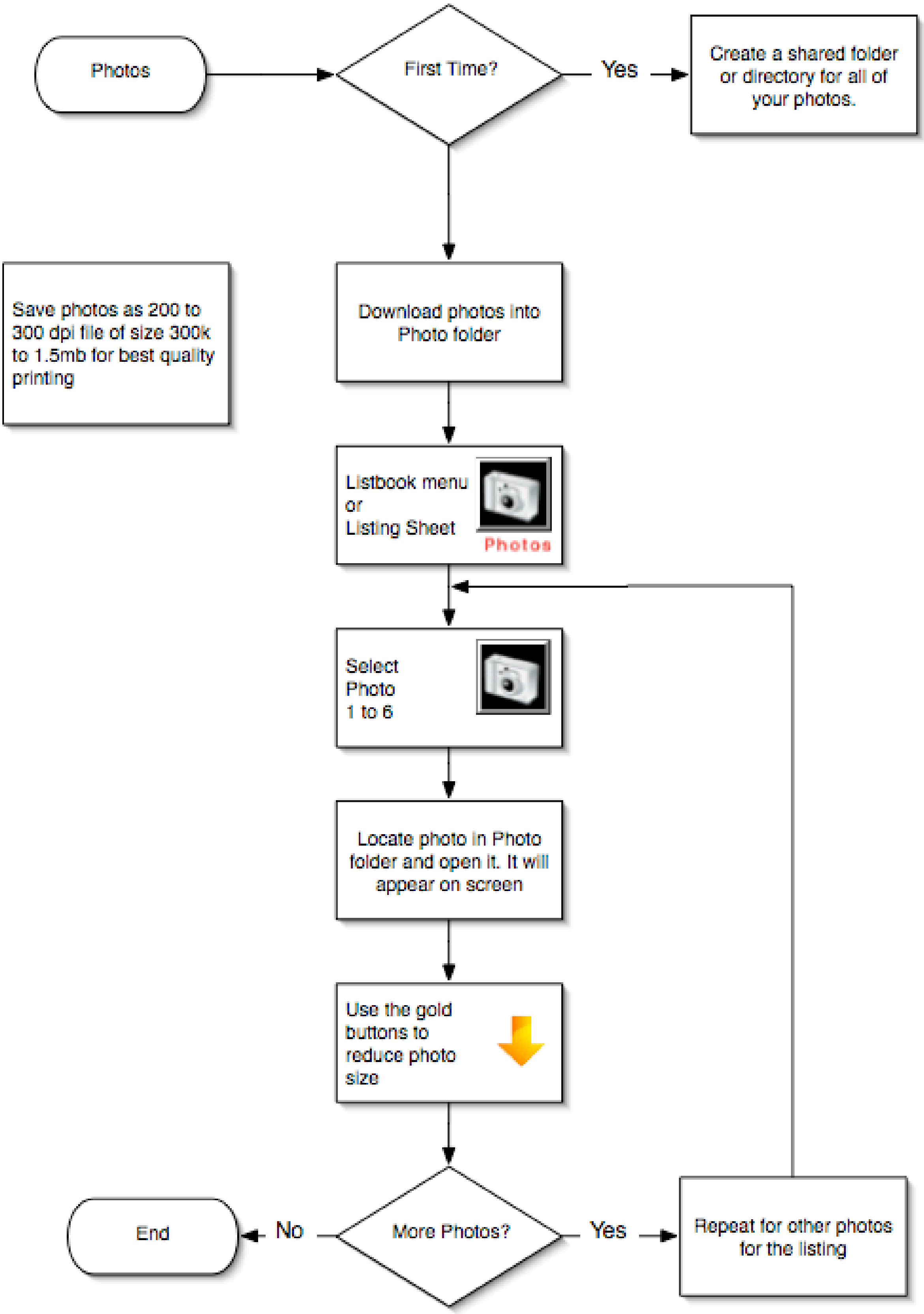
This is the entry screen for advertisements. Ads are used for producing window cards, brochures, flyers and the different advertising layouts available within the database.
Up to 5 ads can be entered for each property. Ad 1 is used for all window cards and brochures, while any of the other ads can be scheduled for use in any of the advertising layouts. The **Ad #** field in the top left corner determines which of the 5 ads is used in the **Ad Schedules**. See the full discussion on setting up and scheduling ads in the **Advertising** section of the manual.
Spell Check is used to spell check all of the ads that have been entered. You will be given the option to add words to your own list with the **Learn** option. If nothing appears to happen when you do a spell check, then use the **Edit** menu, then **Spelling** then the **Select Dictionaries** option to find the dictionaries in the Filemaker folder (in System folder for Mac, Program Folder for Windows).



The **Rural**, **Land** and **House** buttons return to either of the listing sheets.

The concept between the 5 ads is that Ad 1 is used for brochures and window cards, while ads 2 to 5 may be used for specific publications, so 2 is for one local paper, 3 for the other local paper, 4 for the classifieds and 5 for an editorial for instance. Then when scheduling the ads to be printed or booked, the correct ad may be included in the schedule for automatic printing.

Adding Pictures Flowchart

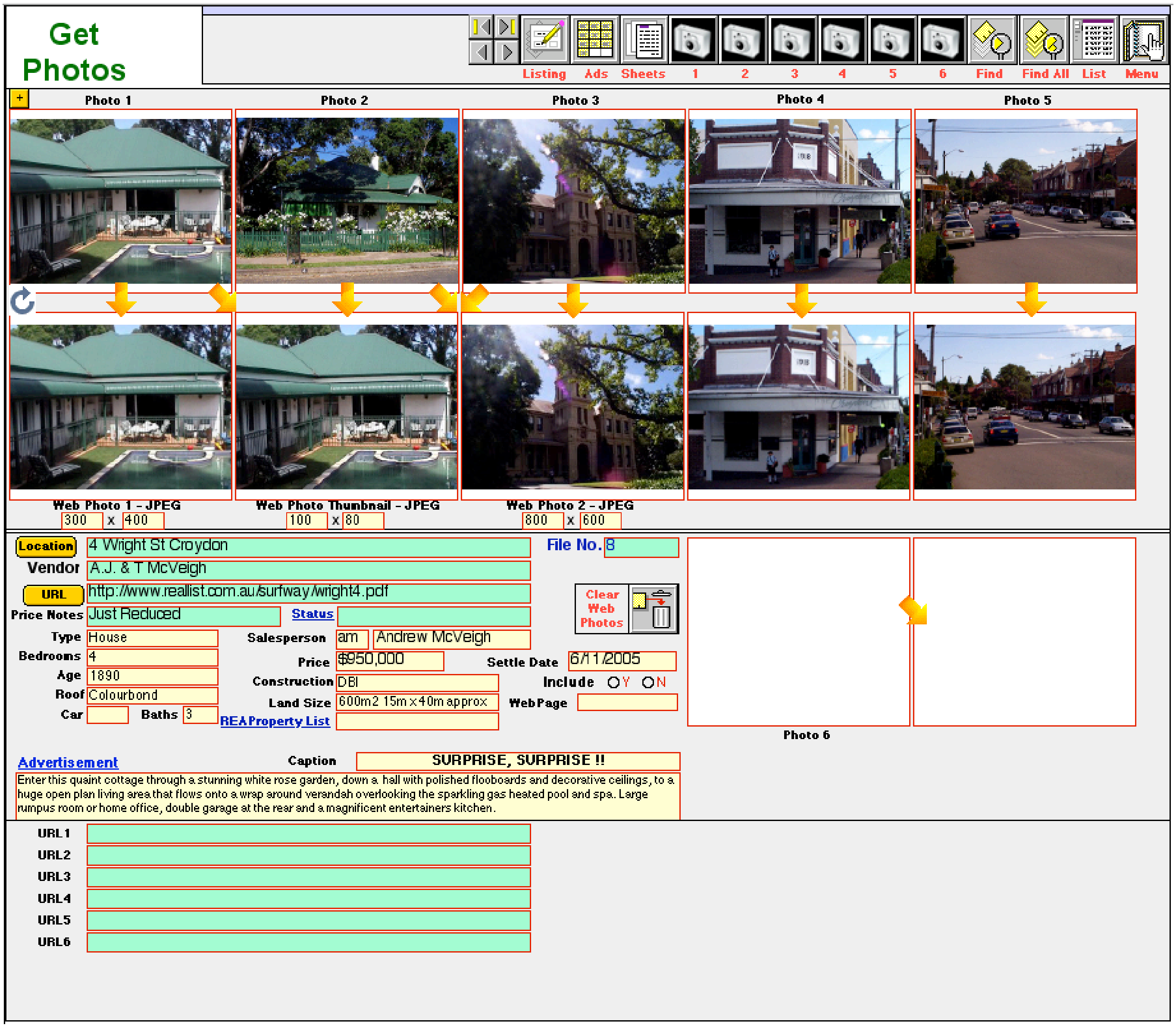


Adding Pictures

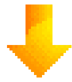
This option is available for you to add photos of properties into your database. The photos may be download from a digital camera, scanned from a print or saved from an email or internet web site. The photos can then be used to produce window cards, brochures and advertising layouts as well as being uploaded to the internet.

Using either of these methods, you will need to save the photos into a folder that we can access them from. Once this is done we can then load them into the database.

When you select the Pictures option from the Main Menu, the following screen is displayed;



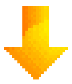
The major issue when dealing with photos is to make sure that the full sized photo is **not** inserted into the database as this will lead to a very large database size which then could cause corruption to the database. Instead photos should be linked to the database so the original photo is not held in Listpro. To do this effectively so all users can see the photos they need to be saved into a network drive that all computers have access to.

The alternative to this is that one person loads all of the photos and then uses the  to reduce the photo size down a more manageable size that will not corrupt the database. The size of the photo is reduced to the number of pixels detailed under the photo and this size can be changed by the user to suit different window card or brochure or web page sizes. Once a size has been set for a photo then it should not be changed otherwise the photos will all have inconsistent sizes (even though they appear the same size on the screen).

The settings for each photo size can be changed on this screen or in the Agent file. The DPI setting for the photos is set at 72 dpi and can only be changed in the Agent file.

If the property you wish to add the picture to is not the one currently displayed, then select **Find** and find the property first.

Then you may click on the **Photo 1** to **6** buttons you will prompted for a picture to get, select the correct picture by moving through your files and folders and then opening the picture you want. The picture will then be loaded onto the screen and automatically saved.

The  icons can then be used to reduce the photos down to the selected sizes. The  icon can be used to rotate a photo around from landscape to portrait or vice versa.

For the photo importing and reduction to work without errors a number of plugins must be loaded. These plug-ins are located with the **Externals** folder on the Listpro installer CD. On a Macintosh they need to be loaded into the **Filemaker Extensions** folder within the **Filemaker Pro** folder within Applications, or in Windows they need to be loaded into the **System** folder within **Filemaker Pro** within the Program Files folder.
The plug-ins that are required for all platforms are;

ExportFM
DialogMagic
SMTPit
And for Windows
PC Outlook Manipulator

Which allows you to communicate with Outlook.

In addition Quicktime version 5.0 or later needs to be installed. This comes pre installed on all Macintoshes and Windows XP PC's but will need to be installed on older PC's. The installer is located in the Externals folder as well.

Photos Notes

When storing a photo as a reference only, the photo is held in its folder and a reference to that folder is held in the database. This makes the display and use of photos much quicker and keeps the file size down to manageable levels. The only requirement of this method is that the photo must always be in that same folder at all times when it is being used. If it has been moved to another folder, renamed or deleted then the reference link will be broken and you will have to relink the reference again. **The best method** of keeping photos is to establish a folder called Photos on your hard disk or a network folder and store all photos of current listings in that folder. As soon as the listing is no longer current, move the photo to a backup folder or delete it, and the link will be removed from the database. Some agents back up all photos to a CD first so they always have a copy of the photo of the property available.

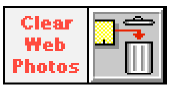
Photo 1 is the photo used for most of the layouts. There are a number of brochure layouts that support three pictures of the property. If you intend on using these layouts then you can load three photos in, otherwise you will only be wasting space in the database.

The quality of the photo will affect the speed at which the photo is loaded and used. High resolution photos give the best quality but take the most time. There will be a compromise between quality and speed that is dependant on the speed of your computer and printer. Ideally greyscale photos should be scanned or taken at 150-300 dpi while colour photos are better taken and held at 150dpi maximum otherwise the file size will exceed 4mb for each photo. Of course if you have a 400mhz G3 or Pentium with gigabytes of space and memory, and a fast 1200dpi colour printer, then 300dpi is ideal for photo quality prints.

Web Photos

These photos must be stored in the database so they can be loaded to the Web Page. Web photos generally need to be the following sizes.

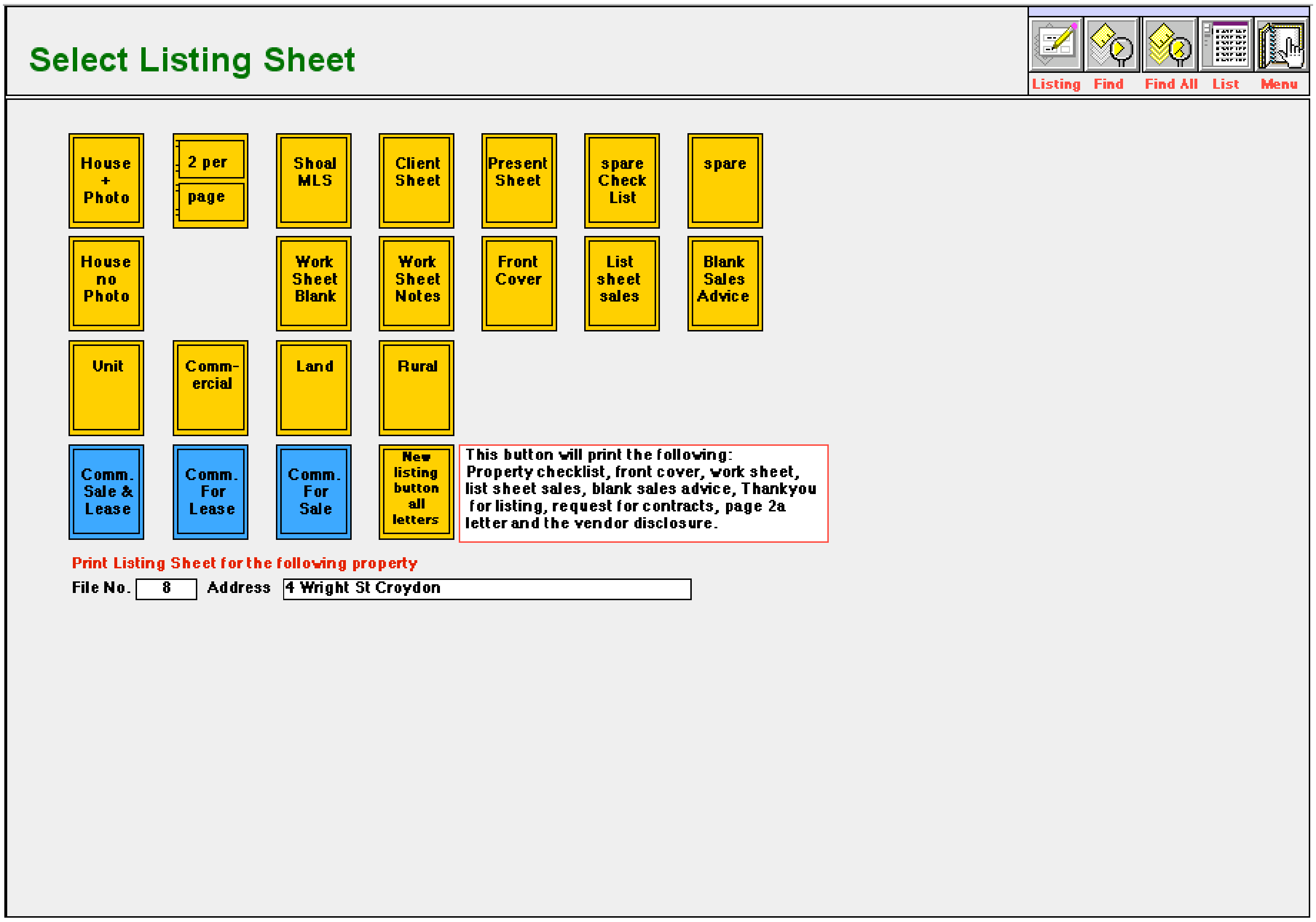
Photo Web 1 = JPEG, 400 pixels wide, 75 dpi, file size less than 70k (ideal = 40k).
Photo Web Thumbnail = JPEG, 150 pixels wide, 75 dpi, file size less than 20k (ideal = 10k)
Photo Web 2 = as per Photo Web 1
Location Photos and Map = JPEG, 200 pixels wide, 72 dpi, file size less than 40k.

Once the listings have been loaded to the web, you may clear all of the photos from the database by selecting the 

option. This will keep the database down to a reasonable size so it can be backed up easily.

Print Listing Sheet

This screen has a number of different listing formats that may be printed out as well as other standard forms that may be produced to compliment each listing sheet. This screen is displayed by selecting **Print** from one of the **Listing** screens or **Sheet** from the **Listings** screen. The screen is displayed as follows;



Each of the listing sheet formats is displayed as a button. Just click once on the listing sheet button you wish, the sheet will be displayed and then you can click on the **Print** button and the sheet will be printed out. The main two formats are the A4 Page 1 & 2, the 1 has a small picture of the listing on the sheet, and the 2 does not have a picture on it.
The Two Per Page format will print out suitable for the small listing book formats popular with EAC listings books.

A **Client Sheet** differs from a listing sheet in that it has all confidential details regarding the listing removed so that only information pertinent to a purchaser is printed. It also has a place for a photo to be placed on or scanned into.

The **Land** sheet prints out a Listing Sheet in the Land listings format and a Rural sheet in the Rural format.

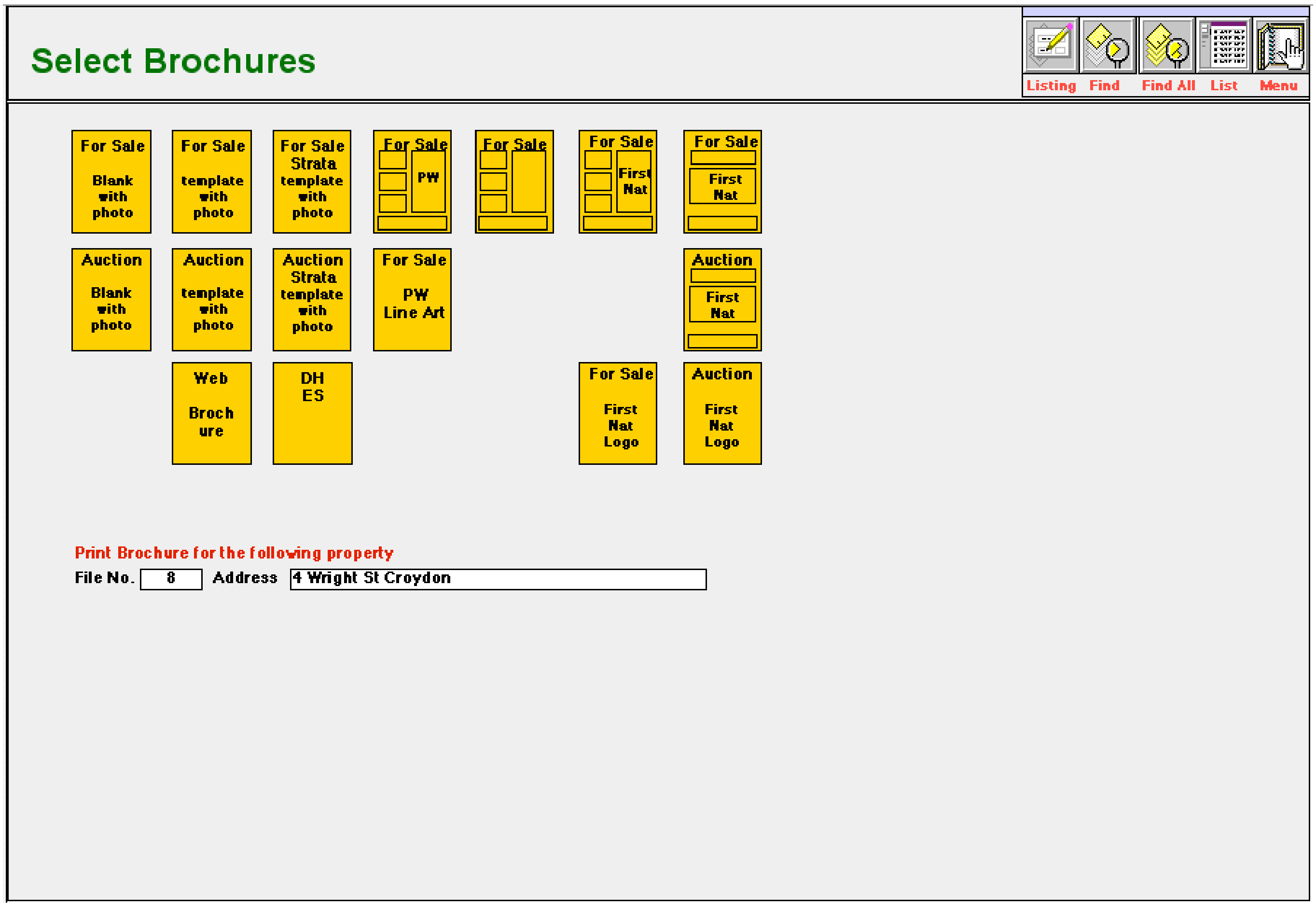
When printing out listing sheets, you may select a number of copies to be printed (one for each salesperson and one master) and make sure that the **Current Record** option is selected just to print the displayed record only. You may also use this option to print out a blank listing sheet by selecting the **Blank Records showing fields as formatted** option.

The **Listing Sheet** plus the **Work Sheet**, **Front Cover** and **Blank Sales Advice** may be printed out as a set for manual use by salespersons when they either do not have access to computers or it is not their job to enter the data, but pass completed sheets onto a sales assistant. Use the button down the bottom of the page to automate the printing of all these work sheets.

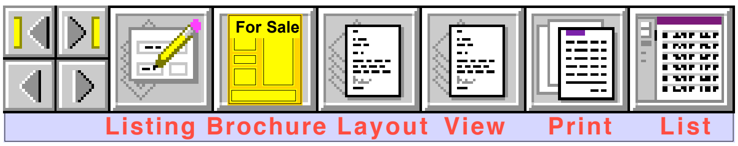
The **Work Sheet Notes** will print out a work sheet with any notes that have been entered for the Vendor in the **Contacts** screen. This is useful if the salespeople have access to a computer. The **Work Sheet Blank** will print the same sheet but with blank lines ready to have notes filled in on them. This is used for a manual paper system when computers are not available for all salespersons.

Brochures

The **Brochures** screen displays the different types of brochures available to be printed. Each agent may have a screen with more brochures on it. In any case printing a brochure is simply a matter of clicking on the required brochure displayed on the screen and waiting for it to print. All of the text and detail on the screen is extracted from the listing sheet so any alterations may be made on the listing sheet before printing the brochure.



When a brochure format is selected, the property detailed at the bottom of the Brochures menu will be the one to have a brochure printed for it.
A further set of buttons are available when the brochure itself is displayed.



Navigation First, last, next and previous buttons.

Listing Will take you back to the Listing entry screen.

Brochures This will take you to the **Brochures** Menu.

Layout This will display the Page Setup/Print Setup window.

View This will do a print preview to the screen prior to printing the card.

Print	This will print the brochure. Make sure you select **Current record only** option on the print screen.
List	This will return you to the **Listings** screen.

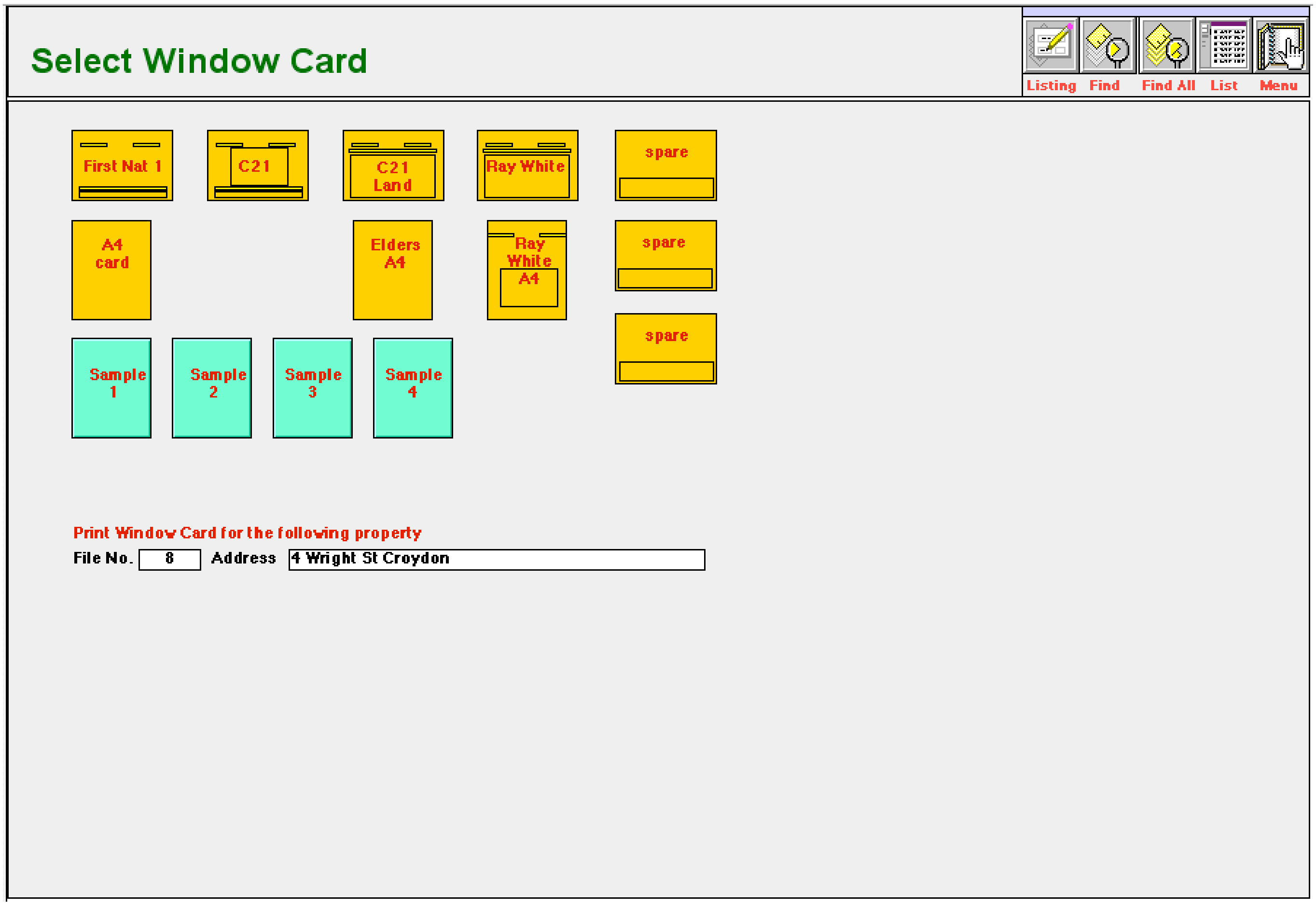
Prior to printing the brochure, you can alter any details on the brochure. Use the **Tab** key to move through the brochure from field to field. Change any details as necessary. Do not use the Format menu to change the appearance of the text, as this will cause the text to change in all another screens as well.

Changing Brochure style.

The appearance of the brochures may be changed and customized to suit individual agents and franchise groups. Notes on how to make permanent changes to formats are included at the end of the manual under the heading ***Changing & Customizing Formats****.*

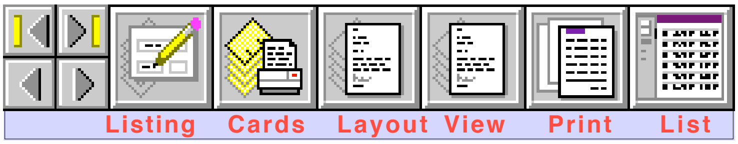
Window Cards

The **Window Cards** screen displays the different types of window cards available to be printed. Each agent may have a screen with more cards on it. In any case printing a card is simply a matter of clicking on the required card displayed on the screen. This will then take you to a screen where the final card will be displayed. You may then alter any text on the card as necessary before printing it.



When the card is displayed a small panel of buttons are available so that you can return to the **Menu**, go back and select a different **Cards** format, **Preview** the card on the screen or **Print** the card out.

A further set of buttons are available when the brochure itself is displayed.



Navigation First, last, next and previous buttons.

Listing Will take you back to the Listing entry screen.

Cards This will take you to the **Brochures** Menu.

Layout This will display the Page Setup/Print Setup window.

View This will do a print preview to the screen prior to printing the card.

Print This will print the brochure. Make sure you select **Current record only** option on the print screen.

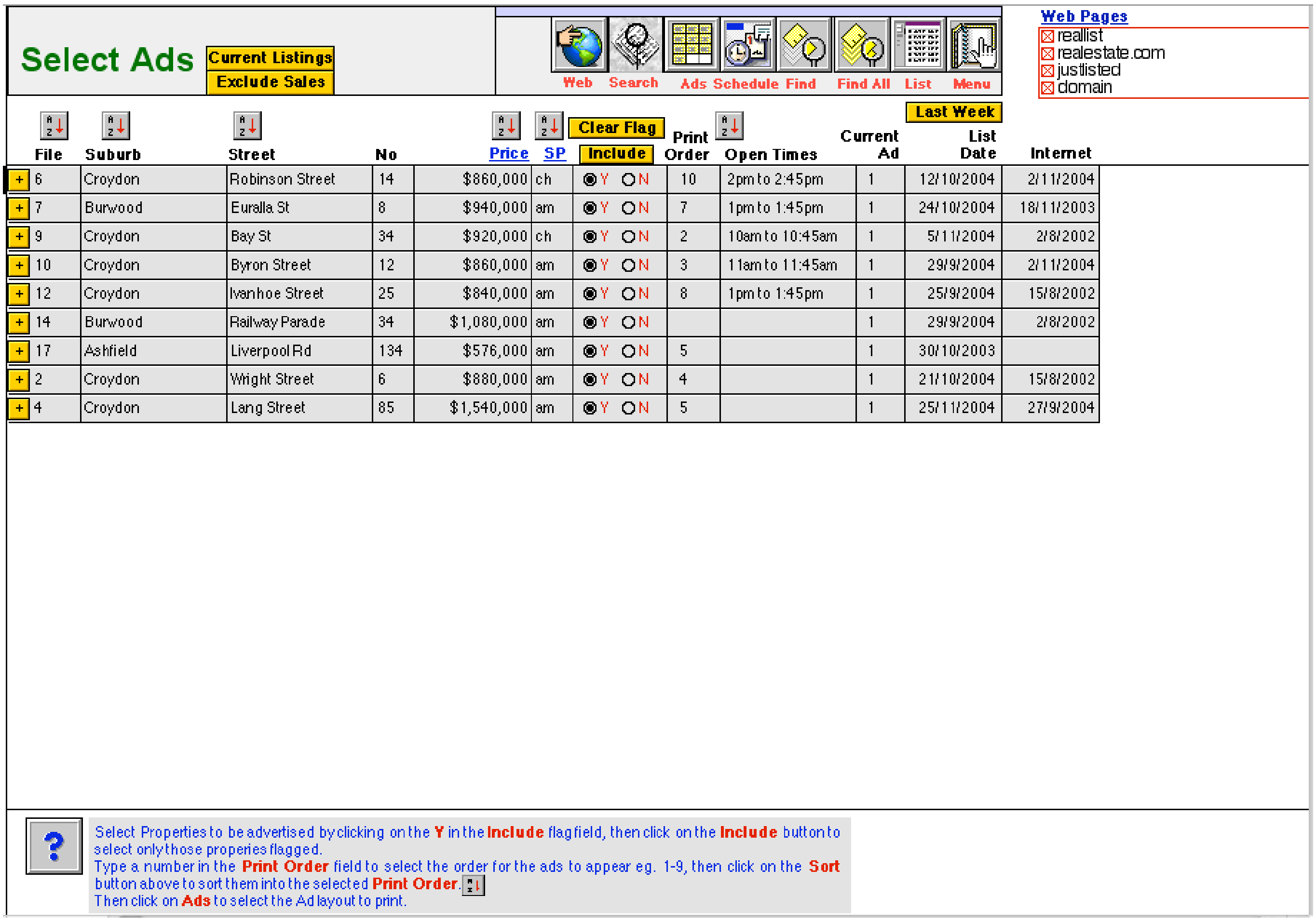
List This will return you to the **Listings** screen.

Prior to printing the card, you alter any details on the card. Use the **Tab** key to move through the card from field to field. Change any details as necessary. Do not use the Format menu to change the appearance of the text, as this will cause the text to change in all another screens as well.

Changing Card style. *see notes on changing Brochures style on the previous page.*

Select & Print Ads

The **Select & Print Ads** option allows you to list all of the properties on the screen and select which ones you wish to advertise. There are many different ad formats in the system that may be used, some are full page, half page, three to a page etc. To best use this system, select the type of ad you wish to print and how many properties are going to use this ad format. Then select the matching number of properties to be advertised, i.e. for a four per page ad, select either 4, 8, 12 etc properties. Some ad formats such as the open house list just keep going on from page to page, so any number can be selected to be printed.
Also included is the ability to create an export file with photos that can be compressed or zipped up and sent to a newspaper to simplify the weekly advertising.
A number of the ad formats have also a place for a photo or picture that must be loaded before.



Scheduling and Placing Ads

The database can also be used to completely automate the scheduling and placing of ads in the media. This process starts when each property is listed. An advertising schedule may be set for each property by using the **Schedule** button. When the ads are due to be booked (i.e. faxed to the paper) the **Search** button can be used to flag the properties scheduled to be placed that day. Finally the list of properties to be advertised along with the ads themselves can be printed for faxing to the paper. Each of these processes, **Scheduling**, **Searching**, and **Printing** are described in separate sections below.

Manually Selecting Ads

The first step in selecting properties is to select the **Find All** button. This will list all of the properties on the screen. Any properties that were selected last time will have a black dot in the **Y** option in the **Include** field. You may wish to clear the **Y** from all of the **Include** fields first. To do this simply click on the Clear Flag button. All of the dots in the Y N options will be cleared.
Now you can go down the list of properties, clicking on the **Y** button for all properties to be advertised. A blank or a **N** is the same, and will not include the property.
When you have finished selecting the properties, click on the Include button and only those properties with a **Y** will be displayed. You may then determine the order you want the ads to appear by changing the number in the **Print Order** field. Once you have numbered all the properties accordingly, click on the A Z button and the properties will be sorted by the number in that field.
The **Current Ad** field is used to determine which of the 5 ads is going to be used for each property.

Don't forget to click on the Current Listings or Exclude Sales button to make sure you don't advertise any properties that have been sold.

Sorting Ads

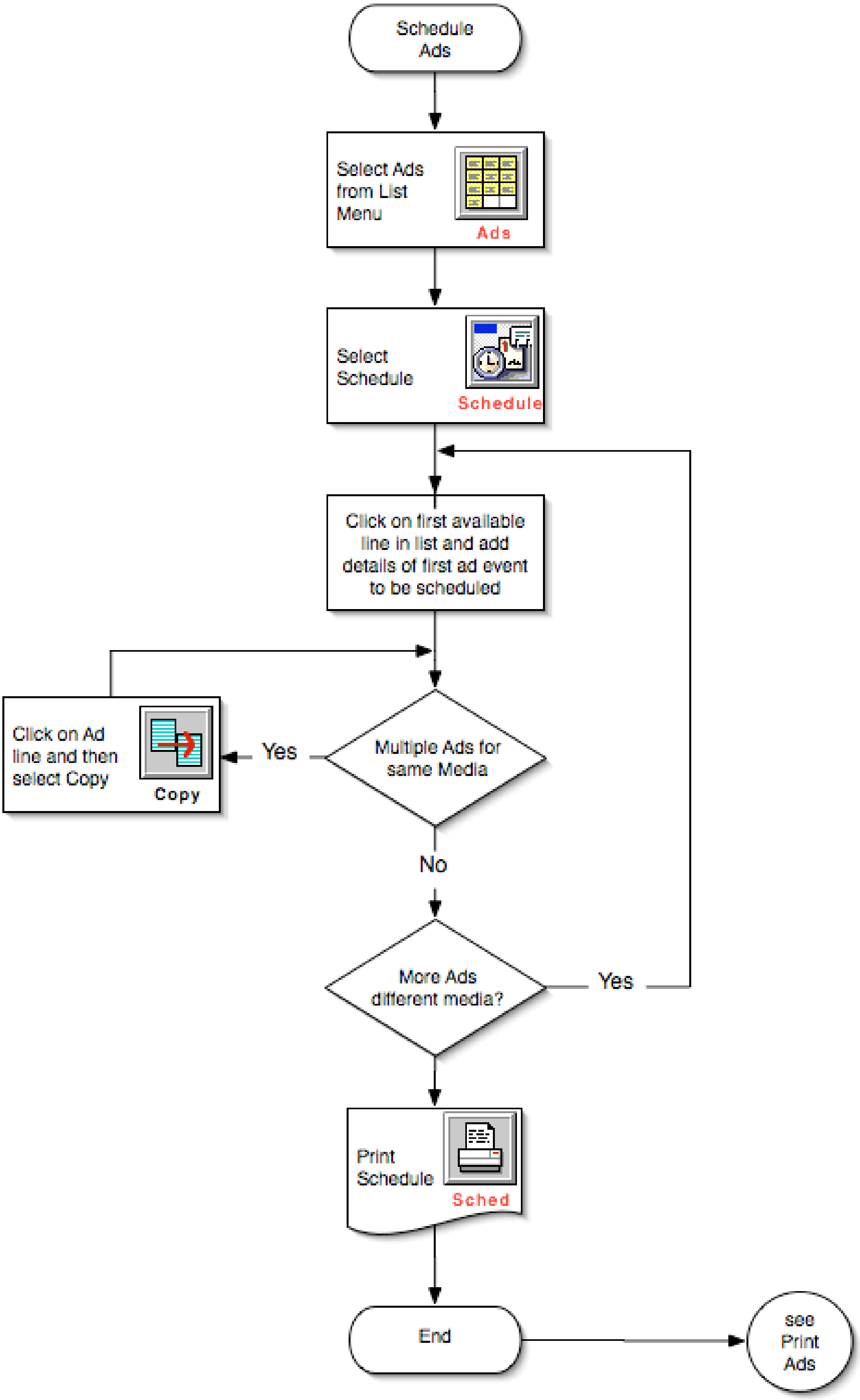
Like the **Search** screen, there a number of fields that have A Z above the column headings. These buttons are sort buttons that will sort the list of properties in different orders. For instance clicking on the A Z above **Price** will cause all properties to be sorted by **Price** etc. The **Print Order** field may be altered to set up a custom sorting order.

Click on the **Ads** button to display the **Ads** screen where you can select which ad format to print.

Automatic Selection of Ads

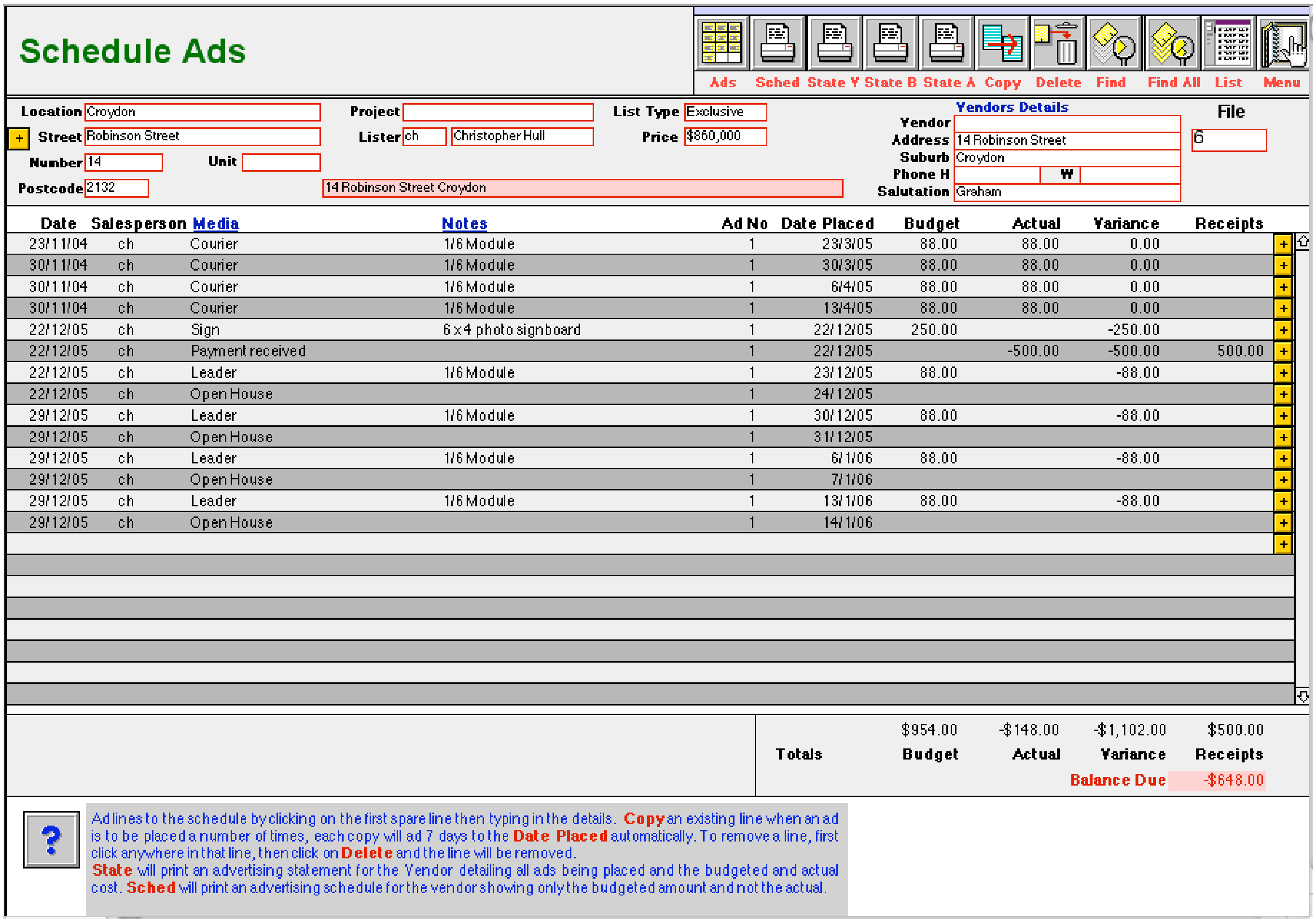
This section describes the **Scheduling**, **Searching**, and **Printing** of ads to be placed.
Before scheduling any ads you should decide which of the 5 ads can be entered for each property are going to be used for each media type. For instance Ad 1 may be for Window Cards and Brochures, Ad2 for a display ad in the local paper and Ad 3 for a classified ad. Ad 4 may be an editorial and 5 may be for a property guide. This is an example only to show how the ads may be used. The importance of this is that when scheduling the ads, the media type, date of the ad and the number of the ad to be placed are required. If no ad number is entered, ad 1 is used as the default.

Scheduling Ads Flowchart



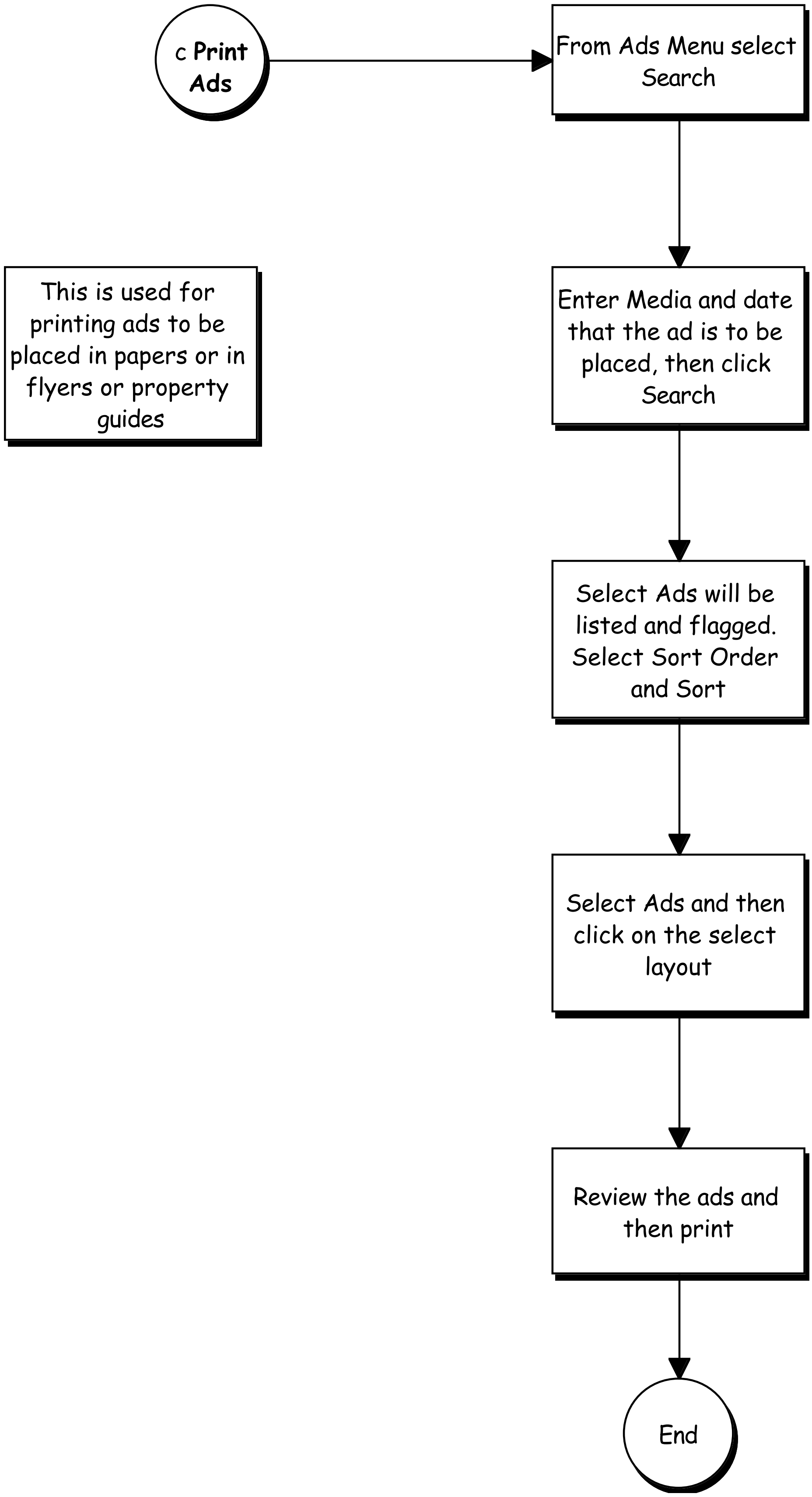
Scheduling Ads

Click on the **Schedule** button to display the following screen;

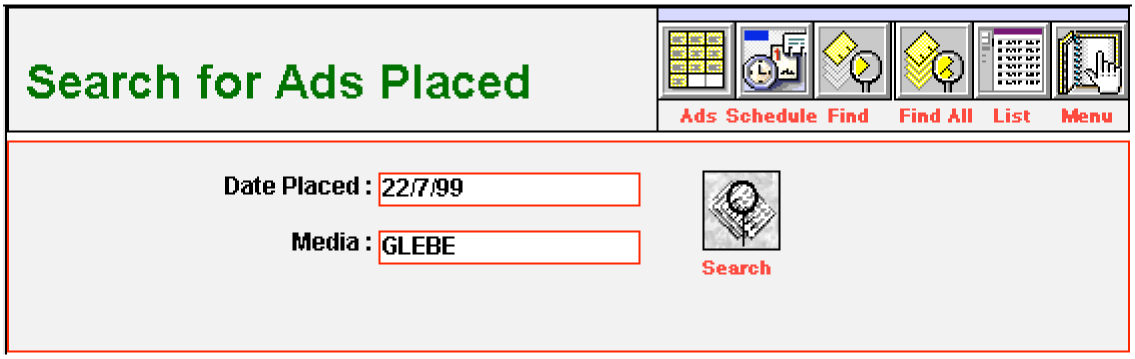


Firstly **Find** the property you want to schedule if it is nor already displayed. Then click in the first line of the list and enter the details of the ad to be placed.
The **Date** is simply the date the schedule is being entered and is for reference purposes only. The **Media** field will be a drop down box that will list the **Media** types available. At the bottom of the List is the **Edit** option that will allow you to customize the list to your Media types. Signboards, Brochures, Flyers and any other advertising expenses can also be included in the list so that a full cost schedule can be produced for the property. The **Notes** field is used to describe the ad to be placed, either the size, number of lines or caption for the ad. The **Ad No** is used to set which of the 5 ads is to be used, the **Date Placed** must be the date that the ad will appear (not the day it must be booked by), the **Budget** is for an estimate of the cost and is used in the Vendors Advertising Schedule report that may be printed, and the **Actual** amount can be filled in from invoices received so a full Advertising Statement can be produced for a vendor.
When an ad line is finished, if there is going to be a repeat of the ad on a weekly basis, click on the **Copy** button and a duplicate of the ad will appear for 7 days hence.
The **Delete** button can be used to remove a line, first click on the line then select **Delete** to remove it. The **Sched** button is used to print the Vendors Advertising Schedule report. The **State** buttons are used to print different formats of the Vendors Advertising Statement report.
Use the **Ads** button to return to the **Select Ads** screen.

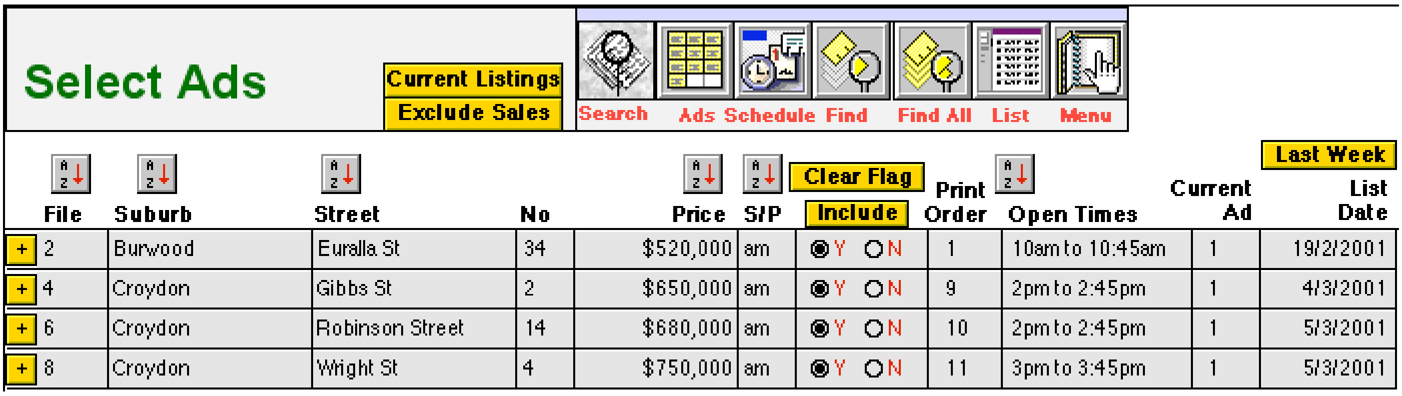
Searching for Ads to Printed



From the **Select Ads** screen click on the **Search** button to display the following screen;



Click in the **Date Placed** field and enter the date to search for and then in the **Media** field to select the media that the ads are to be placed in. Then click on the **Search** button to start the search. If there are any properties found in the search then they will be displayed when the screen returns to the **Select Ads** screen. So for the above search the following ads were found and displayed.



File	Suburb	Street	No	Price	S/P	Include	Print Order	Open Times	Current Ad	List Date
2	Burwood	Euralla St	34	$520,000	am	◉Y ○N	1	10am to 10:45am	1	19/2/2001
4	Croydon	Gibbs St	2	$650,000	am	◉Y ○N	9	2pm to 2:45pm	1	4/3/2001
6	Croydon	Robinson Street	14	$680,000	am	◉Y ○N	10	2pm to 2:45pm	1	5/3/2001
8	Croydon	Wright St	4	$750,000	am	◉Y ○N	11	3pm to 3:45pm	1	5/3/2001

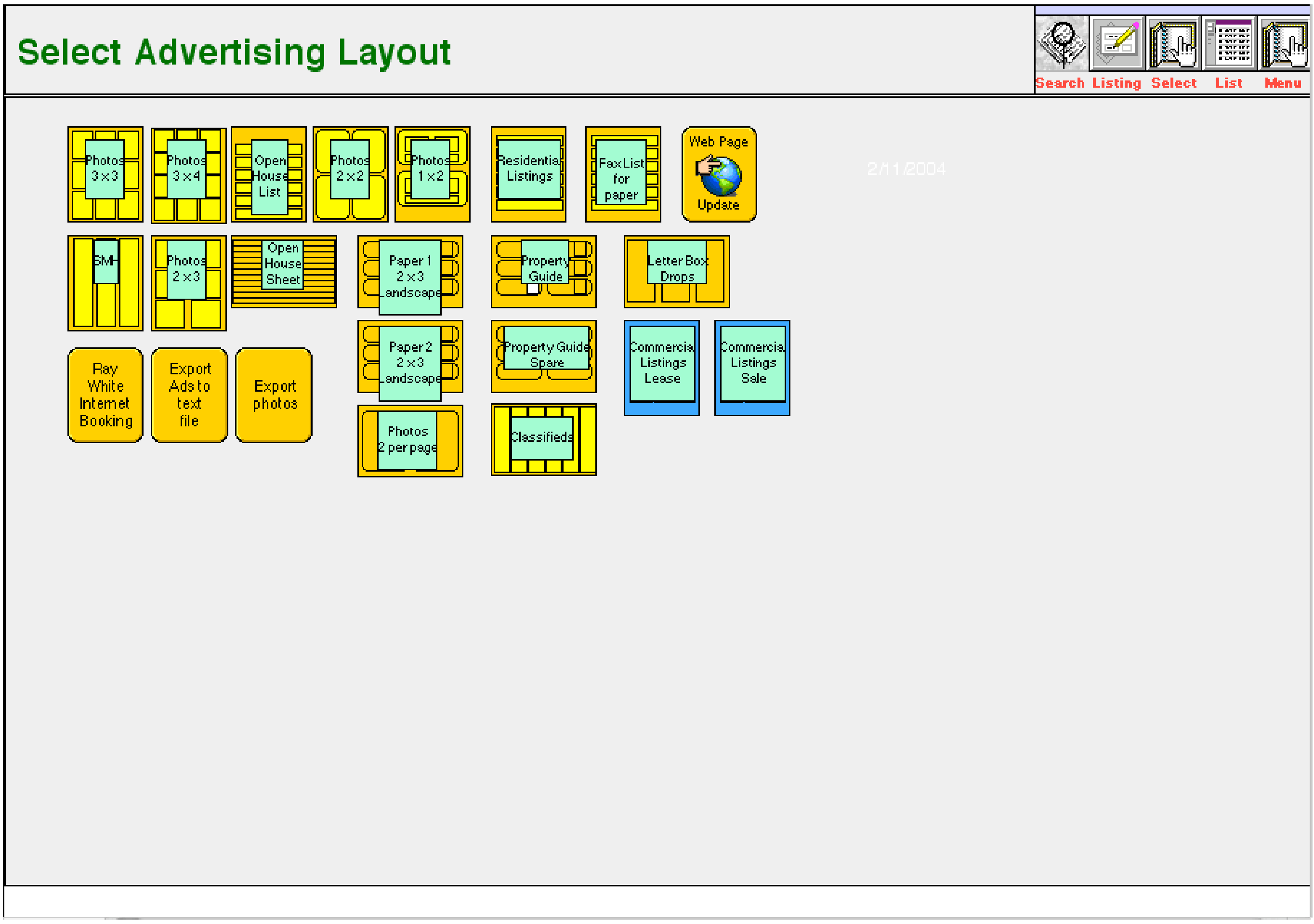
which are all the ads scheduled to be placed in the Glebe newspaper on the 22/7/99. They all have the **Include Flag** set to **Y**. The **Print Order** field can then be used to set the order the ads are to appear. The **Print Order** field is also included on the ad layouts to be faxed to the paper so the same number can be written on the matching photos. After setting the **Print Order** field numbers, click on the button to sort the ads into the correct sequence before printing.

Manual Selection of Ads to be Printed

Note that this process of searching and finding the ads to be printed is only one of the methods of selecting ads. The other method is the manual selection process. Start this process by clicking on **Find All** to list all of the properties, then **Clear Flag** to clear any previous selection of ads. Then scroll through the list clicking **Y** on the ads you want to print. When you have selected the ads, click on the **Include** button to find and list just those properties that have been flagged. From here you can then print the ads in the same way as the **Searching** method.

Printing Ads

Once you have selected a list of ads to be printed, click on the **Ads** button to take you to the selection screen for the ad layout to be used.



From this screen you can select the following options;

Listing displays the **Ad Entry** part of the **Listing Sheet** where ad details can be changed.

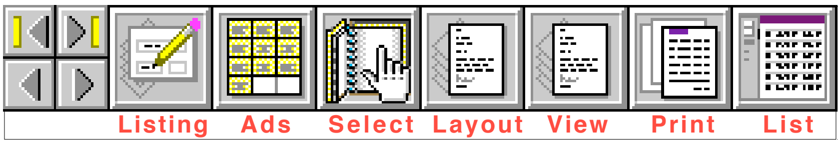
Select displays the **Select Ad** screen where the list of ads to be printed can be selected.

List to display the **List Menu**.

This screen may be different for each agent as you can customise your own ad formats.

To select the ad style to print, click on the matching ad style on the screen and the first ad will be displayed.

To change any of the ads, select the **Listing** button to go to the **Ad Entry** screen. You may review all of the ads by clicking on the **navigation** buttons.



Print Ads

After selecting **View**, select **Preview** at the bottom of the screen, and change it to **Browse** to get out of that mode.

Finally you can click on the **Print** button to print the ads out.

Listing takes you to the **Ads** section of the full listing sheet for the selected listing where the ads themselves may be changed.

Ads takes you back to the **Advertisements** screen as above.

Select takes you back to **Select Ads** screen.

Layout displays the **Page Layout** screen allowing to change the standard settings before printing. These settings are preset for each layout and should not need to be changed, but they can be is necessary by using this option.

View displays a **Page Preview** showing how all of the selected ads will be printed. The only way out of the **Preview** mode is to select the **Browse** option from the **Mode** menu or from the bottom left corner of the screen or by press **Apple B** (Mac) or **Control B** (Windows).

Print when you are ready to print the Ads, click on this button. Make sure the **Records being browsed** is selected to print more than one listing.

List takes you back to the **List Menu**.

Ad Layouts

The format and layout of the ads can easily be changed with a little Filemaker layout practice. It is always a good idea to back up the ListPro folder before attempting to change any of the layouts.
Some of the layouts are preset to fit on certain page sizes with certain numbers of ads so for instance the 4 per page layout fits 4 ads on an A4 page, so when thinking about changing the layout be very careful about changing the overall dimensions of the ad otherwise it may not fit on the page again. By all means change the font style and positioning of the fields but not the overall size.
Also when printing a layout such as 4 per page, then you should select multiples of 4 properties for inclusion or for the 9 per page, multiples of 9.
Other layouts such as the Open House List and the Fax Ads to Paper list are free format and expand to suit the number of ads to be printed so are more easily changed to suit.

Web Update

This option allows you to select a list of properties and publish them on the Web. The selection process is the same as for normal ads, the end result far more powerful.
A separate database is included with the system called **Web Update.fp5** which is where the ads/listings get transferred to through this option. The **Web Update** database can then be published or hosted on a web server and a search page designed to access the listings. This is an alternative to publishing your listings on a large listing site such as property.com or realestate.com when you want to maintain your own web page presence.
The process of updating properties to the Webpage is as follows;

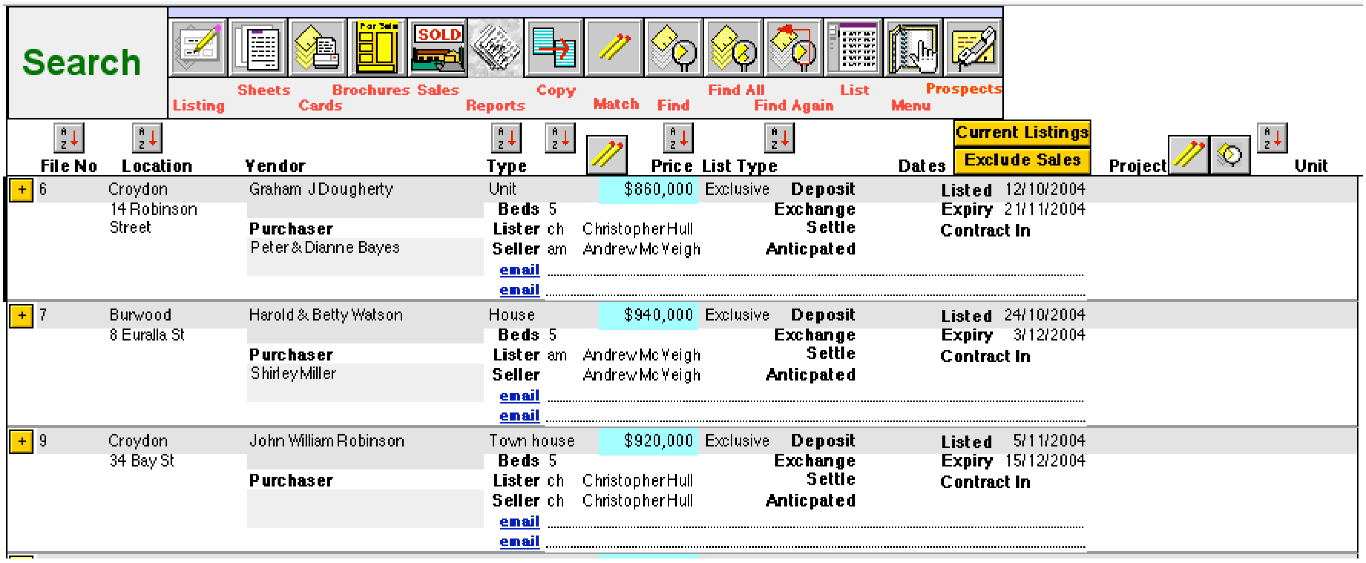
1. Select Properties to be Updated. This can be done by using the **Last Week** button to select all properties listed within the last week for instance. An alternative is to select the **Find** option and then type in a range of dates e.g. 1/4/01...14/4/01 rather than use the Last Week search.

2. Review all Photos for Properties to make sure they comply with the requirements for web photos. These requirements are as follows;
   Photo Web 1 = JPEG, 400 pixels wide, 75 dpi, file size less than 70k (ideal = 40k).
   Photo Web Thumbnail = JPEG, 150 pixels wide, 75 dpi, file size less than 20k (ideal = 10k)
   Photo Web 2 = as per Photo Web 1
   Location Photos and Map = JPEG, 200 pixels wide, 75 dpi, file size less than 40k.
3. Select Adverts, then Ads, then Web Update to commence upload to Web. This must be done on a computer with Internet Access as well as Listpro access, as an attempt will be made to connect to the Host Database published.
4. All selected photos will be exported to a file called **WebExp.fp3/WebExp.fp5** located either on the **Desktop** for Macintosh or in **My Documents** on a Windows PC (this can be changed if required to any other folder).
5. The **WebPage** database will then be opened on the host and you will be requested for a password. Press enter as there is no password. You will then be prompted for the location of the **WebExp** file which will be located in the directory discussed in point 4. Open this database and the update will begin. Depending on the number of photos and listings to be updated as well as the speed of the internet connection, this process can take some time so do not be concerned. A time line should appear on the screen showing the progress of the update.

NOTES, because of the time of the update, your internet connection will need to be set to not timeout if inactive for at least 1 hour if not longer for large scale updates. Estimates of time can be made by timing an update of 2 to 3 properties for instance and then multiplying this time by the number of properties updated in an average weekly update.

Searching Listings

The search screen may be used to find and list properties using criteria typed in. The **Search** screen is displayed by selecting **Search** from the **List Menu** or clicking on the **Search** button in any of the button palettes. The **Search** screen appears as follows;

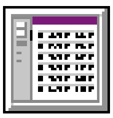


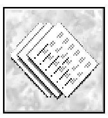
The **Find** option is the most used button on this screen. It is used to start the find process whereby you may type in the criteria used for the search. A sample of criteria is displayed on the above screen. We have selected Ashfield in the Suburb field, <u>House</u> in the Type field, from 3 to 4 bedrooms and from price $350,000 to $400,000 and construction as Brick Veneer.
It is not always wise to narrow your selection down too much on the search screen as you may miss a property that is borderline on being suitable. So in general most people want either a House or Unit, they have a minimum number of bedrooms and they have a price range. Therefore use these three fields as the main search fields. Some search techniques are as follows;

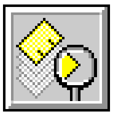
Range To enter a range i.e. from $250,000 to $300,000, type in the from range followed by three fullstops **...** and then the to range.

More or Less To find all entries with more than or less than a certain number, then use the greater than and less than symbols, **< >** or include the equals sign for a greater than or equal to search, **>=**. etc.

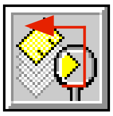
The following buttons may be used to help in the search;


List This returns to the **List Menu**.

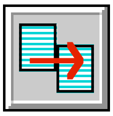

Reports This button displays the list of available reports that may be printed. This is selected after you have found the properties that you want to print firstly. It is the same **Reports** option that may be selected from the **Menu.**



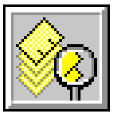
Find This button is used to start a find. Any fields may be used for the find, simply enter the data you require to search on and press **Return** or **Enter** to find.



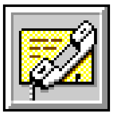
Find Again This button starts the find mode with the last find requests you made still there, thus allowing you to alter the previous find.



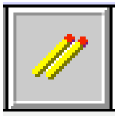
Copy This option only works when you are in the **Find** mode. In the **Find** mode it is useful as it can duplicate a find criteria so that you can find for instance all houses from $200000 to $250000 and the **Copy** which creates a new line on the search criteria. You can then alter the Type field from House to Unit and keep the price range current. As such you can find listings based on a number of search criteria.



Find All This button will display all listings currently entered. This should be selected if you are printing out reports for all listings.



Prospects Use this button to return to the Prospects screen when you have used the **Match** button in Prospects to display this search screen.

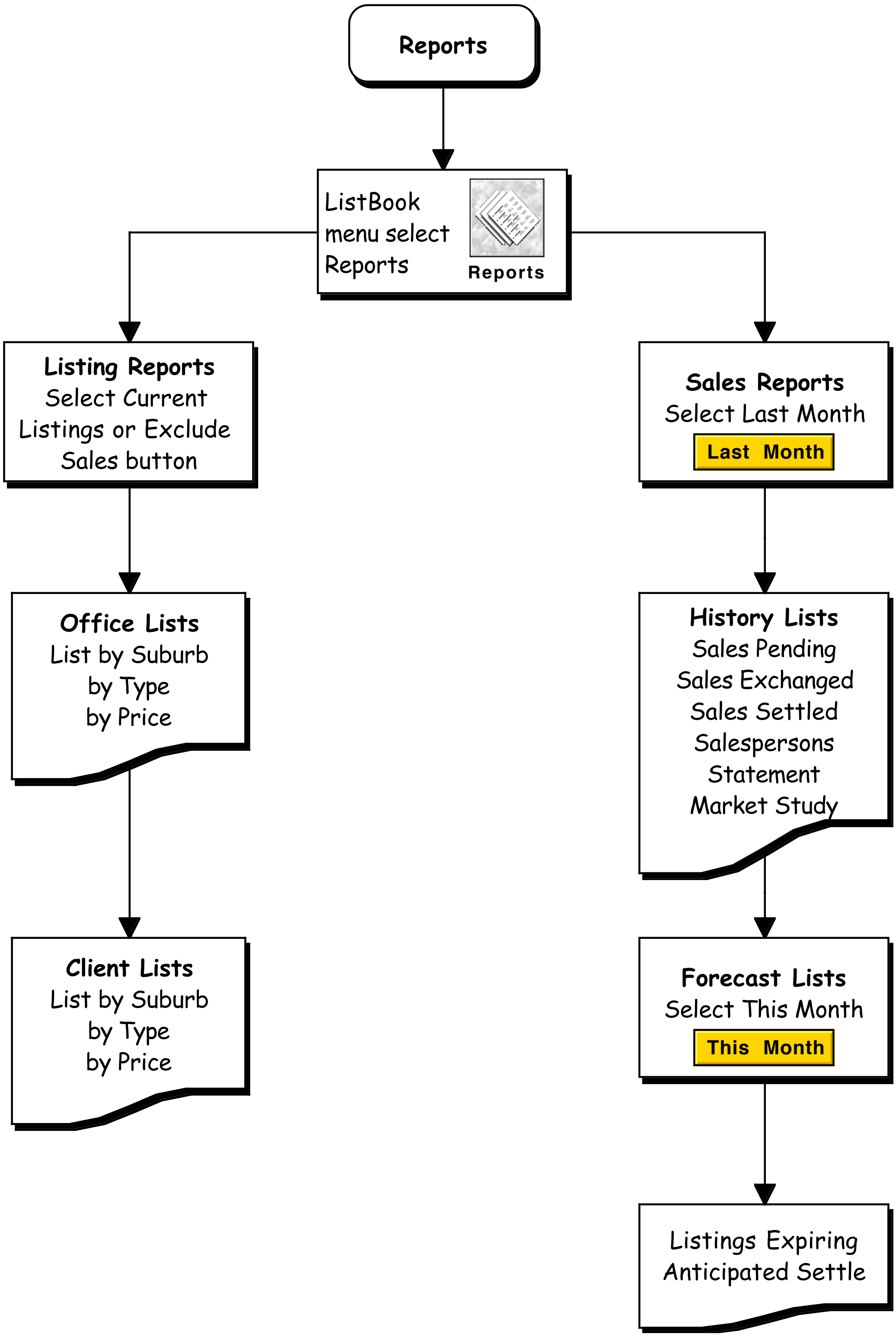


Match This will search the Prospects database to find any purchasers who match the currently selected listing.

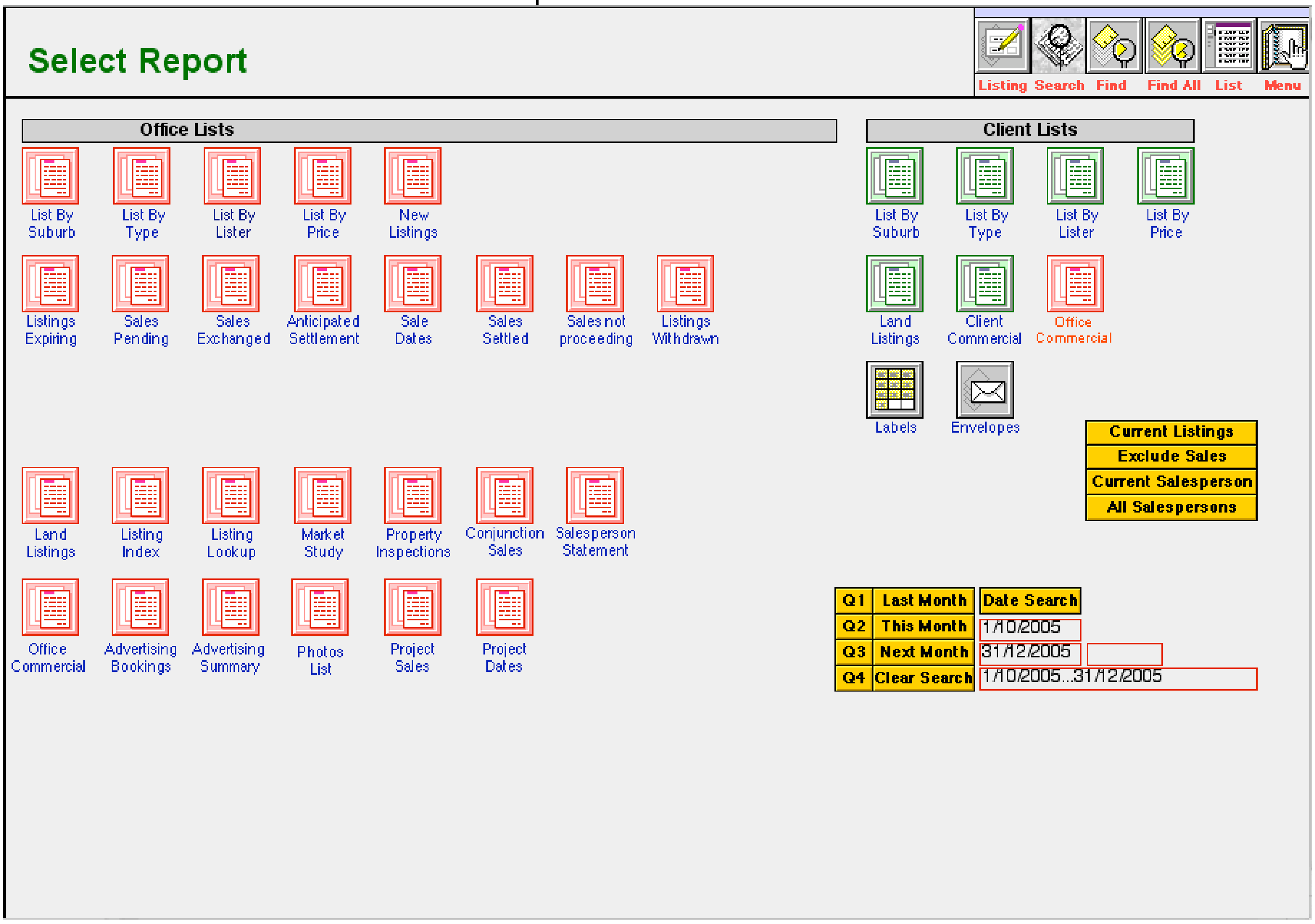
Current Listings This button will automatically find all your current listings only. To do this it checks that there is no date in the Deposit Date, Exchange Date, Settle Date or Fallover Date fields. Only listings without those dates will be displayed.

Exclude Sales This button can be used in conjunction with any other search to exclude any listings have been either sold or withdrawn. To use this option, firstly perform the find that you want e.g. Find all houses. Once you have found these listings, click on **Exclude Sales** and any listings that have been found e.g. all houses, will be checked to see if they have a date in the Deposit Date, Exchange Date, Settle Date or Fallover Date fields and then excluded from the list. This option should always be used prior to printing out any of your current listing reports.

Printing Reports Flowchart



This is the **Reports Menu** that displays a list of all of the available reports. This menu may differ from agent to agent depending on the required reports. Basically they are broken into three types, Office lists that display confidential information, Client lists that print the same reports without any confidential information on them and Salespersons List designed to track Salespersons Activities.
To print a report simply click on the button for the required report. All of the reports have been set up so that they will sort and print in the required sequence. When the print dialogue box appears, make sure you have selected the **Records being browsed** option so that all records found or listed will be included in the report.



Prior to printing out any report, you may wish to go to the Search screen and select a group of listings to be included in the report. Use the find option in the Search screen to select listings, then select the Report button to get to the above screen. Then select the report to be printed.
Some reports also use the **Date Search** facility at the bottom of the screen. Select the **Last Month**, **This Month**, or **Next Month** buttons to set up a specific search. The Reports that use these dates include **New Listings**, **Listings Expiring**, **Sales Pending**, **Sales Exchanged**, **Anticipated Settlement** and **Sales Settled** reports.

Report Summary

There are two types of reports, Office Lists that contain confidential information, and Client Lists that may be handed out to purchasers.

List by Suburb	A list sorted by price within suburb, with page breaks for each suburb.
List by Type	A list by type i.e. Houses, Units, Land in price order and a new page for each type.

List by Salesperson A list by price by listing salesperson, with each salesperson starting on a new page. Ideal for sales meetings.

List by Price A list in straight price order (low to high) with no page breaks.

New Listings A list of all new listings selected by the search date. A date selection must be entered first before printing this report.

Listings Expiring A list of all listings that will expire within the date selection. Make sure a date selection is entered first.

Sales Pending A list of all sales that have a Deposit Date but no Exchange Date within the date select range.

Sales Exchanged A list of all sales that have an Exchange Date but no Settle Date within the date select range.

Sales Settled A list of all sales that have a Settle Date within the date select range.

Sales not Proceeding A list of all sales that have a Fallover Date within the date select range.

Listings Withdrawn A list of all listings with a Withdrawn Date within the date select range.

Land Listing A list of land only in price order. This will include all listings with the word **Land** in their property type field e.g. Land, Rural Land, Land and House.

Listing Index An abbreviated list of all listings with File No's for reference purposes.

Conjunction Sales A list of all sales with conjunction agents. A conjunction agent must be entered with a conjunction percentage and a settled or exchanged date.

Advertising Booking Sheets This report first prompts for a number days in advance that you wish to display the bookings and then prints the report out. So if you have ads scheduled for next weeks paper, but need to book them this week, select 14 days in advance and this will list all ads that need to be booked this week for display next week.

Salesperson Statement A complete Salesperson statement in approved form that details all Sales Affected (Exchanged) and Sales Settled with a selected period. The period may be selected from the next screen that appears. For further details see **Salespersons Statement** screen.

Sale Dates	A detailed list of all sales in progress and the dates associated with the sale.
Property Inspections	A report detailing all inspection made at listings, taken from data entered in the Property Inspections screen.
Listing Lookup	A summary list of all listings with vendor contact details.
Market Study	A report detailing the statistics behind each sale based on information enter in the **Price Changes** screen. This includes the time on market before any price reduction and then the time it took to sell after a price reduction.
Photos List	This will print out a list of the selected properties showing the names and locations of all linked photos, useful if you need to clean up any photos for non current listings.
Project Sales	This report will print out all sales for individual projects with totals for each project.
Project Dates	This will print out a list of all project sales showing the relevant dates for that project.

Client Lists

List by Suburb A list sorted by price within suburb, with page breaks for each suburb.

List by Type A list by type i.e. Houses, Units, Land in price order and a new page for each type.

List by Salesperson A list by price by listing salesperson, each salesperson starting on a new page

List by Price A list in straight price order with no page breaks.

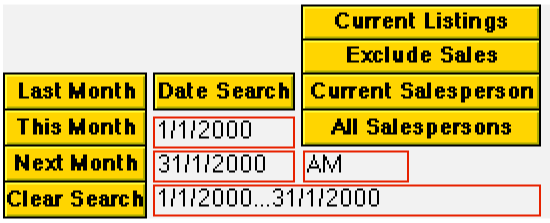
Land List A list of land only in suburb then price order.

Labels This option will print labels to all vendors if you want to do a mail out. The format of the label is 2 across and 7 down the page with 1cm margin at top on bottom of a standard A4 page. This format can be changed in the **Layout** mode to suit any label format.

Envelopes This option will print envelopes to all vendors if you want to do a mail out. The format of the envelope is standard DL in landscape mode. This format can be changed in the **Layout** mode to suit any envelope format.

Search Options

The following search buttons are available for automating the selection of listings to be included in reports.



Current Listings Use this button to omit any sales from your reports. This would be used mainly for the 'on market' reports such as List by Price/Type/Suburb etc. All listings with a Pending Date or greater will be omitted.

Exclude Sales As per the Current Listings option, the main difference is that Sales Pendings will not be omitted with this option.

Last Month Will set the date range to the whole of last month.

This Month Will set the date range to the whole of this month.

Next Month Will set the date range to the whole of next month.

Date Search Will enable a selection of From and To dates to be manually entered.

Current Salesperson Will set the salesperson search field to be the current salesperson as selected from the **Menu**. Then when any of the date selection buttons are used, only those selected within the date range that belong to the selected salesperson will be displayed.

All Salespersons After using the **Current Salesperson** button, this button can be used to select all listings for all salespersons.

Each month when you print out your reports, certain guidelines should be used for selecting properties to be included in those reports. Assuming that you wait for a day or two after the end of month before printing the reports (to make sure all solicitors instructions have been received and entered), then the following is an example of the reports you may print.

Last Month New Listings, Sales Pending, Sales Exchanged, Sales Settled, Sale Dates, Market Study, Sales not Proceeding, Listings Withdrawn.

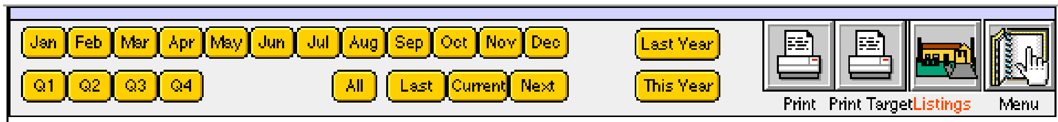
This Month Anticipated Settle, Listings Expiring

Next Month Anticipated Settle, Listings Expiring

This is an example only but may be used as a guide to the reports that should be printed each month.

Salespersons Statements

This screen is where you select which period or date range you wish to print a salespersons statement for. It is displayed by selecting the Salesperson Statement button in the Reports screen above.



1/10/2005
31/12/2005

Selected Printing Month October, 2005 or date range 1/10/2005...31/12/2005

Property		Salesperson	Action		Action Date	Month	Year	LKey	Type	RSN	
27 Ivanhoe Street Croydon	am	Andrew McYeigh	2	Sales Settled	13/12/2005	12	2005	206	List	10	400,000
27 Ivanhoe Street Croydon	am	Andrew McYeigh	2	Sales Settled	13/12/2005	12	2005	206	Sell	11	400,000
4 Wright St Croydon	am	Andrew McYeigh	2	Sales Settled	6/11/2005	11	2005	201	List	18	470,000
4 Wright St Croydon	am	Andrew McYeigh	2	Sales Settled	6/11/2005	11	2005	201	Sell	19	470,000
1020/102 Avon Street Five Dock	am	Andrew McYeigh	1	Sales Effected	18/10/2005	10	2005	225	List	22	600,000
34 Euralla St Burwood	am	Andrew McYeigh	1	Sales Effected	9/12/2005	12	2005	194	List	25	418,250
5/10-12 Crane Street Concord	sal	Simon Alam	2	Sales Settled	11/12/2005	12	2005	239	List	29	48,000
3/10-12 Crane Street Concord	lm	Lilly Masada	1	Sales Effected	15/10/2005	10	2005	241	List	31	250,000
34 Euralla St Burwood	am	Andrew McYeigh	1	Sales Effected	9/12/2005	12	2005	194	Sell	32	418,250
3/10-12 Crane Street Concord	lm	Lilly Masada	1	Sales Effected	15/10/2005	10	2005	241	Sell	33	250,000
1020/102 Avon Street Five Dock	am	Andrew McYeigh	1	Sales Effected	18/10/2005	10	2005	225	Sell	34	600,000
2001/102 Avon Terrace Five Dock	amm	Amelia McYeigh	1	Sales Effected	27/10/2005	10	2005	213	List	35	0
2001/102 Avon Terrace Five Dock	ch	Christopher Hull	1	Sales Effected	27/10/2005	10	2005	213	Sell	36	0
5/10-12 Crane Street Concord	rb	Robert Blanco	2	Sales Settled	11/12/2005	12	2005	239	Sell	37	240,000
101/10 Wharf Rd Balmain	am	Andrew McYeigh	1	Sales Effected	15/12/2005	12	2005	229	List	38	82,500
101/10 Wharf Rd Balmain	rb	Robert Blanco	1	Sales Effected	15/12/2005	12	2005	229	Sell	39	82,500
207/19 Joanna Street East Melbourne	am	Andrew McYeigh	1	Sales Effected	6/11/2005	11	2005	48	Sell	43	225,000
407/19 Joanna Street East Melbourne	am	Andrew McYeigh	1	Sales Effected	30/11/2005	11	2005	49	Sell	158	250,000
507/19 Joanna Street East Melbourne	am	Andrew McYeigh	1	Sales Effected	9/12/2005	12	2005	50	Sell	159	325,000
18 Malvern St Croydon	am	Andrew McYeigh	1	Sales Effected	5/10/2005	10	2005	195	List	228	470,000
18 Malvern St Croydon	ch	Christopher Hull	1	Sales Effected	5/10/2005	10	2005	195	Sell	229	470,000

There are two standard methods for printing statements depending on whether you pay monthly or quarterly commissions.

Monthly

Simply select which month you wish to print the statement for by clicking on the relevant button **Jan** to **Dec**. This will find all sales details for the selected month. The selected month and year will be displayed at the top of the screen. Then click on **print** to print the statement.

Quarterly

Simply select the **Q1** to **Q4** button to select the quarter you wish to print for. Q1 is 1/1/YY to 31/3/YY and Q4 is 1/10/YY to 31/12/YY. You may also wish to select the **This Year** or **Last Year** option depending on which quarter you are printing. Typically for Q1, Q2, Q3 you will use the **This Year** button and for Q4 you will use the **Last Year** button as it will be January before you will get around to printing the Q4 report.

Salesperson

Selecting this button will allow you select sales details for just one salesperson. Firstly make your month or quarter selection then click on the **Salesperson** and enter the initials of the salesperson to print.

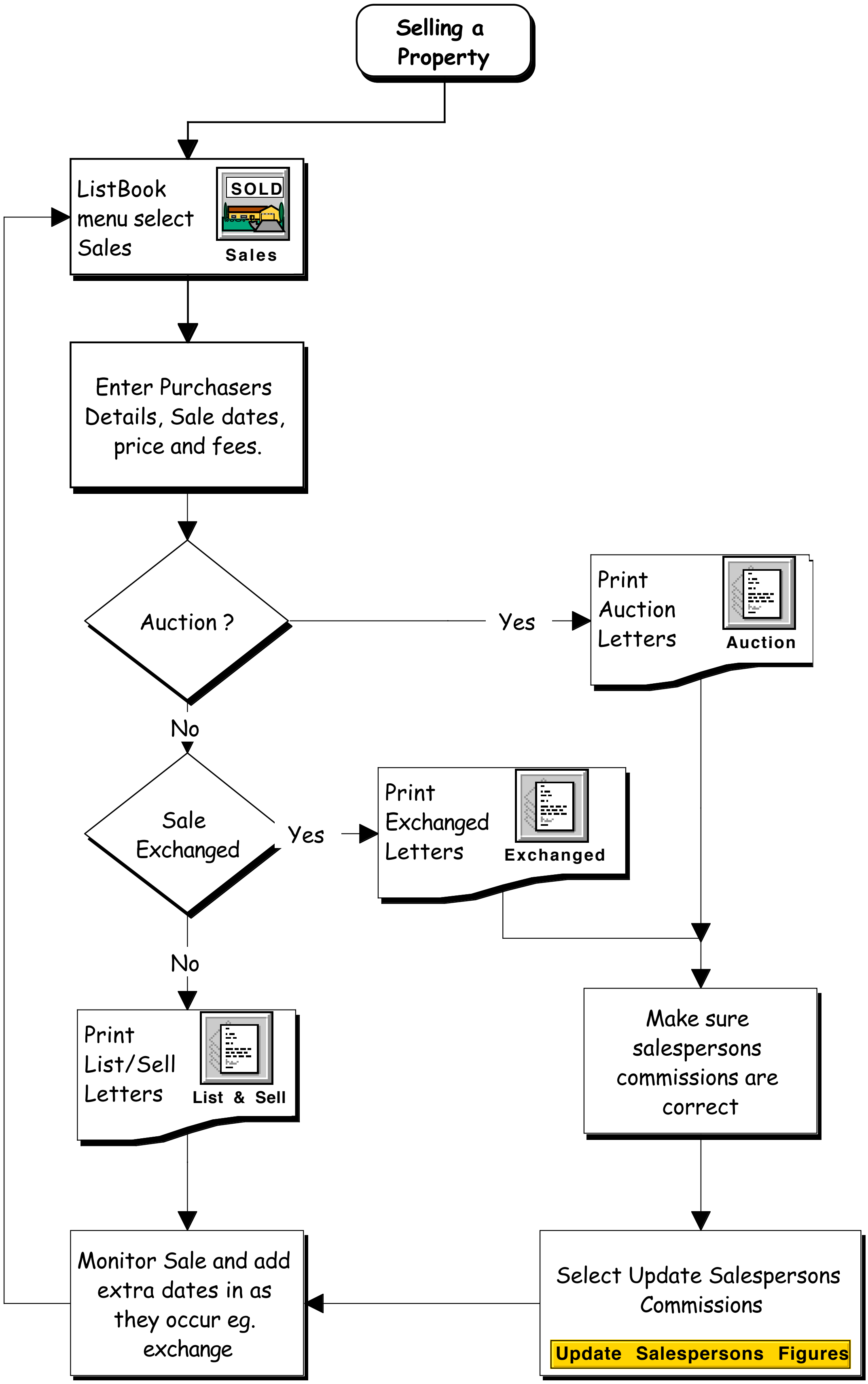
Statement Types

There are two main statement types that can be printed out.

Print This will print out a standard statement suitable for commission only salespersons.

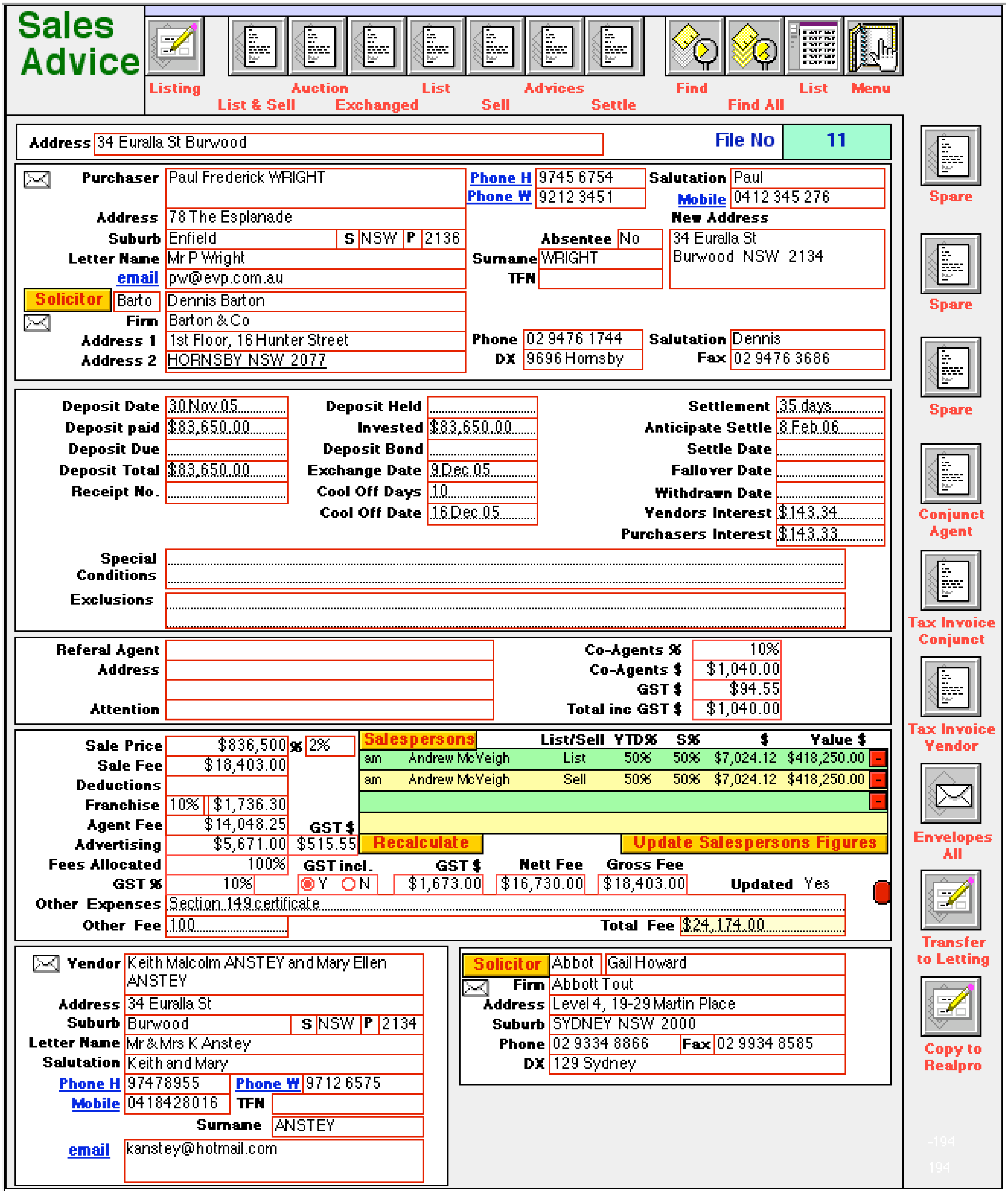
Print Target This statement is better suited to salespersons that have a target or budget to meet or are on a credit debit system.
The targets or monthly debit for each salesperson can be entered in the Salespersons screen.

Selling a Property Flowchart



Sales Advice

The Sales Details option allows you to enter the details of the sale or activity of a property and print out a sales advice and sales letters as well as update salespersons statistics. The screen is displayed as follows;



The first thing to do is find the property. Select the **Find** button and type in the address of the property and **Return** to find it. Then Tab through the screen filling in all the details of the purchaser and sale. Alternatively if you have the Purchaser listed on the Inspections screen for the property, then you can use the **Buy** button to transfer their details onto the Sales Advice.

This screen is also used to enter further details of sale such as when it is exchanged and settled, or when it has fallen over. It is vital to update this information regularly and accurately so that the sales reports may be printed correctly.

Sales Dates
The sales dates determine the status of the listing. A **Deposit Date** should be entered when Offer and Acceptance has occurred even if as deposit has not been paid. This is treated as the start of the business date and will keep the property off the **Current Listings** selection. The **Exchange Date** when entered will keep the property off the **Exclude Sales** list, if a **Cool Off Days** has been entered then the **Cool Off** date will be calculated and the property will not be deemed to be exchanged until the Cool Off date has passed at which point the Exchange Date becomes effective.
The **Anticipated Settle** date will calculate when a number of days is entered in the **Settlement** field. The Settlement field is also used on the sales letters and should typically come from the settlement period specified on the contract.
The **Settle date** should only be entered when the property has settled.
Fallover Date and **Withdrawn date** are entered when the event occurs, if the property is still on the market then the fallover date should be cleared along with all of the purchasers details.

Deposit Amounts
The **Deposit Paid** and **Deposit Due** amounts are added together to make the **Deposit Total**. This same amount should be entered in either of the **Deposit Held**, **Invested** or **Deposit Bond** fields. Held means held in your sales trust, Invested is in an IBD and Bond is if no cash has been paid but a deposit guarantee has been lodged. It is important to fill in these fields correctly as three different letters will be printed depending on the value of these fields. Refer to the Sales Letters flowcharts for more details on which letters get printed when.

Conjunction Agents
There is a section for the entry of a conjunction agent for the sale. The name and address entered here will be used to address the sales details letters to. The **Conjunction %** is the amount of commission to be given to the co-agent. The **Conjunction $** is calculated as the **Conjunction %** multiplied by the **Sale Fee** less **Deductions**. The **Agent Fee** is then the balance of the commission less **Franchise Fee**. All salespersons commissions are then calculated using the **Agent Fee** amount. If there is no co-agent, no Deductions and no Franchise Fee, then the **Sale Fee** and the **Agent Fee** will be the same amount.

Commissions
There is a section for the entry of commission details for the sale. The Sale Price and Sale Fee must be entered (no automatic calculations). The **Deduction** field is for any deduction prior to salespersons commissions are calculated such as multi-list fees or marketing allowances. The **Advertising** field is an amount that prints on the sales advise advising the Vendors Solicitor that this amount of advertising will be taken from the deposit. Do not use this field if advertising has been pre paid. **Fees Allocated** is calculated There are two percentages that can be allocated to a salesperson, firstly the **YTD% percentage** which is the percentage of the sale amount that is credited to each salespersons total sales value, and secondly the **S%** which is the amount of commission that gets credited to the salespersons monthly commission earnings. A commission only salesperson will most likely have a different **YTD%** to the **S%** so while they

may be credited with 50% of the sale for listing a property, they may only get paid 20% of the total commission. A salesperson on a target or credit/debit system may have the **YTD%** and the **S%** the same so if they get credited with 50% of the sale figure they also get 50% of the commission credited towards their target or credited to their ledger.
The **Franchise Fee** is a percentage that is taken from the **Agent's File** that calculates an amount to be deducted from the total commission before the Salespersons Commission is calculated.

To try and simplify the calculations look at the above example.

In the above example the Sale Fee is manually entered then the Agent Fee is calculated as follows;

Sale Price	$836,500	manually entered
Percentage	2%	manually entered
Sale Fee	$18,403	calculated the first time only, once any changes have been made you need clear all the fields before it will calculated automatically again.
Deductions	$500.00	manually entered (e.g. marketing levy etc)
Conjunct. Fee	$1,790.30	(Sale Fee less Deductions * Conjunction percentage) inc GST
Franchise Fee	$1,611.27	(Sale Fee less Deductions less Conj * Franchise Fee) inc GST
Agent Fee	$12,991.18	(Sale - Deductions - Conjunction – Franchise - GST)

The $12,991.18 is then used to calculate the salespersons commissions.

Salesperson List YTD%	$418,250	50% of Sale Price
Salesperson List S%	$7,024.12	50% of Available Fee
Salesperson Sell YTD%	$418,250	50% of Sale Price
Salesperson Sell S%	$7,024.12	50% of Available Fee

The Advertising and Other expenses fields do not affect the commission calculation but do appear on the sales advice, tax invoice and sales letters as extra amounts owed on settlement.

The **Salespersons details** required are their Initials, List/Sell and the commission % allocated to both the sales history and the salespersons statement. The two percentages differ in that the Statement commission is the percentage of the net commission that will be allocated to a salespersons monthly statement for payment of commissions, whereby the credit percentage is that used to allocate a percentage of the sale to the salespersons yearly sales figures. So while the salesperson may only be paid say 20% of the commission, they may be allocated 50% of the sale for purposes of yearly sales figures and commission brought into the office.

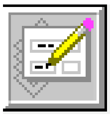
After any of the commission figures have been altered, the resulting calculations may not be redrawn on the screen immediately. They may be viewed by clicking on the **Recalculate** button. In addition once a sale price and sale fee % have been entered for the first time the sale fee $ will be calculated automatically. If either the sale amount or the sale fee % change, then you need to clear the sale fee field plus the sale fee % and sale price field before the calculation will happen automatically again.

All of this commission information is used to produce the **Salespersons Statement** (See **Reports**). As far as letters go, the first salesperson listed is deemed to be the listing

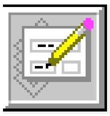
salesperson and the last one listed is the selling salesperson. So in letters to the Vendor the first salespersons details are used to sign off the letter, while letters to the purchaser use the last salespersons details. If only one salespersons details are shown, then they become the lister and seller on the letters.
Once the property has settled, the salespersons yearly figures can be updated. Make sure all of the commission calculations are correct before selecting the **Update Salespersons Figures** option. The calculated figures will be added to the monthly totals for the salesperson, the month being selected using either the month of the Exchange Date or the Settle Date depending on which date is selected in the Agent's file (**Update Date** field).

The red can be used to clear any of the salespersons lines but this should not be done once the salespersons figures have been updated.

The button can be used to Undo the **Update Salespersons Figures** process if you have the administrators password.



Transfer to letting — This button will transfer the sale property to the Lettings database in the case where the property has become a management.



Copy to Realpro — This button will transfer the sale property to the RealproX software where it becomes part of the trust accounting software. In RealproX, go to the Sales File screen and select Paste to complete the transfer.

Printing Sales Letters and Advices

There are different types of sales letters and sales advices that can be printed. The sales letters that print are in a series that match the circumstances, so when you have an offer an acceptance there are a series of letters for that situation, the same for sale at auction, and exchange in office and so on.

A flowchart of the letters that get printed and the matching layout number for each letter are contained in Appendix A at the back of the manual. This is useful if you have built up the skills to change the letters and need to know where to go to find the letters.

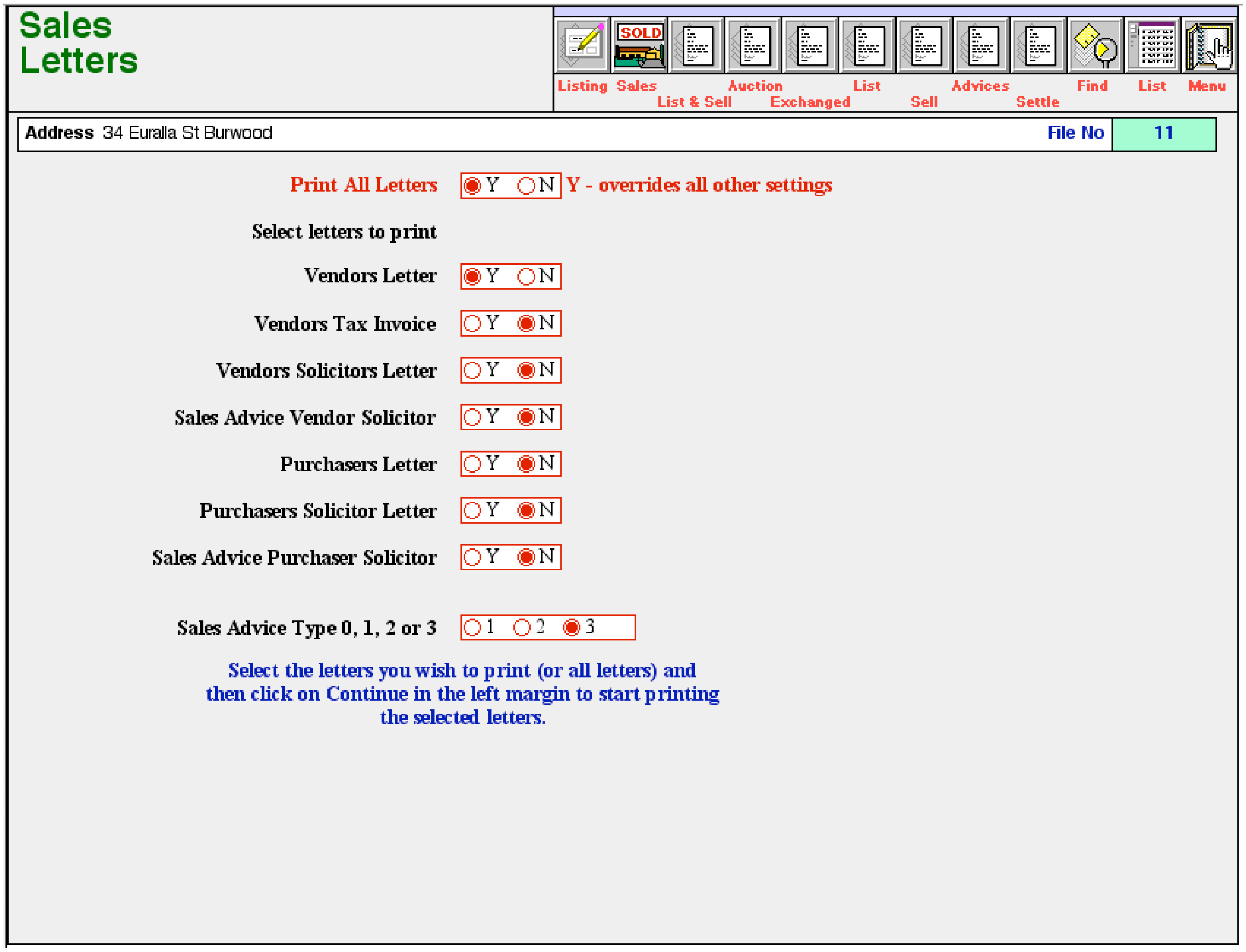
List & Sell	The standard sales advice that prints out a letter to Vendor, Purchaser and both solicitors and two sales advices'.
Auction	The standard sales advice that prints out a letter to Vendor, Purchaser and both solicitors and two sales advices's when a property has been sold at auction. There are different letters printed depending on whether there is advertising owing or not.
Exchanged	This will print a set of Exchanged letters out when the property has been exchanged. This is used either when the cool off period has expired or you have been informed by the solicitors that the property has exchanged.
List	A sales advice for conjunction sales when we are the listing agent. Prints out letters to Vendor and Vendors solicitor and one sale advise.
Sell	A sales advice when we are the conjunction agent. Prints out a letter to the purchaser and purchaser's solicitor and one sales advice only.
Advices	Will print out just the sales advices without any letters.
Settle	Prints out a letter congratulating the vendor and purchaser on completion of the sale/purchase of the property

Other additional custom letters are also available for special circumstances. They are listed down the right hand side of the screen. There a number spares that can be altered to suit.

Customizing Letters	*Sales Letters may be customized to suit, however care should be taken before doing this and a backup should always be made first. For further details on changing letters, see the section at the end of the manual on **Customizing Formats, Letters and Layouts.***

Printing Sales Letters

When any of the Sales Letter options are select (List and Sell, Auction etc.) a screen will appear that lets you select which of the series of letters you want to print. So if you have already printed the List and Sell series of letters and a name was spelled incorrectly on one of the letters and needs to be reprinted then this screen will allow you to select which letter of the series needs to be reprinted.



Print all Letters in a Series

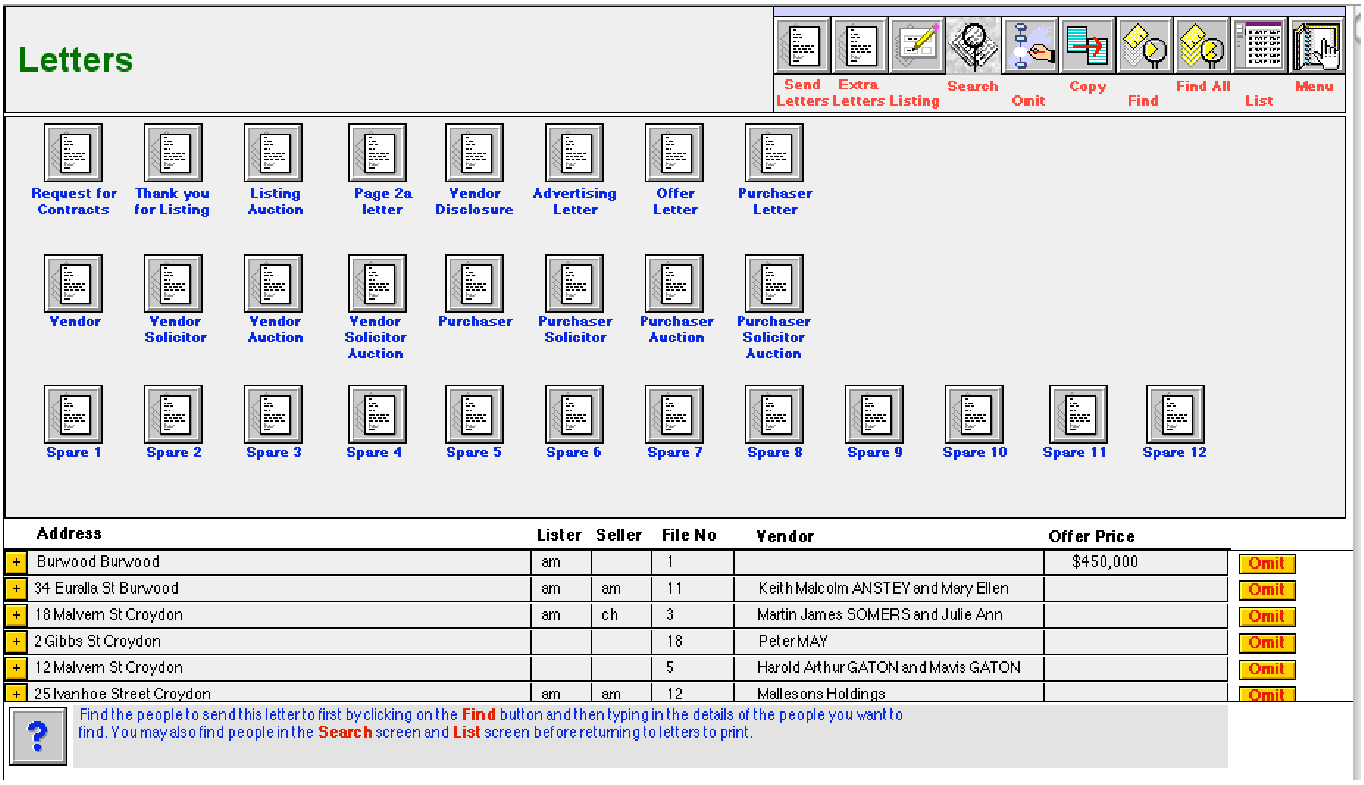
When you want to print out all letters in a series such as when an offer and acceptance has just been completed, simply click on the **Y** of the **Print All Letters** option and then **Continue** in the left margin. All the letters in the set will be printed.
You will be prompted for page setup and printer locations for the first letter and then all letters will follow from the same setup.

Printing Single Letters from a Series

Should you need to reprint a letter from a series then click on **N** of the **Print All Letters** option and then select the **Y** or **N** options from the list of letters below.
This way only the select letters will be printed.

Letters

The Letters option allows you to enter and print out a series of standard letters to selected vendors and purchasers. You should initially select the properties to be mailed through the Search screen or Listings screen.
There are a number of standard letters built into the basic system, but other letters may be added.



Printing Letters

To print any of the letters, simply click on the name of the letter and the print screen will be displayed. Make sure though before you decide to print the letter or letters that you have selected the correct person or group of people to send the letter to.

Single Letters

To print a letter to a single person, select **Find** and type in the address of the property. Make sure the property is on top of the list at the bottom of the screen, then click on the letter. When the print box is displayed, select **Current Record Only** as your selection.

Multiple Letters

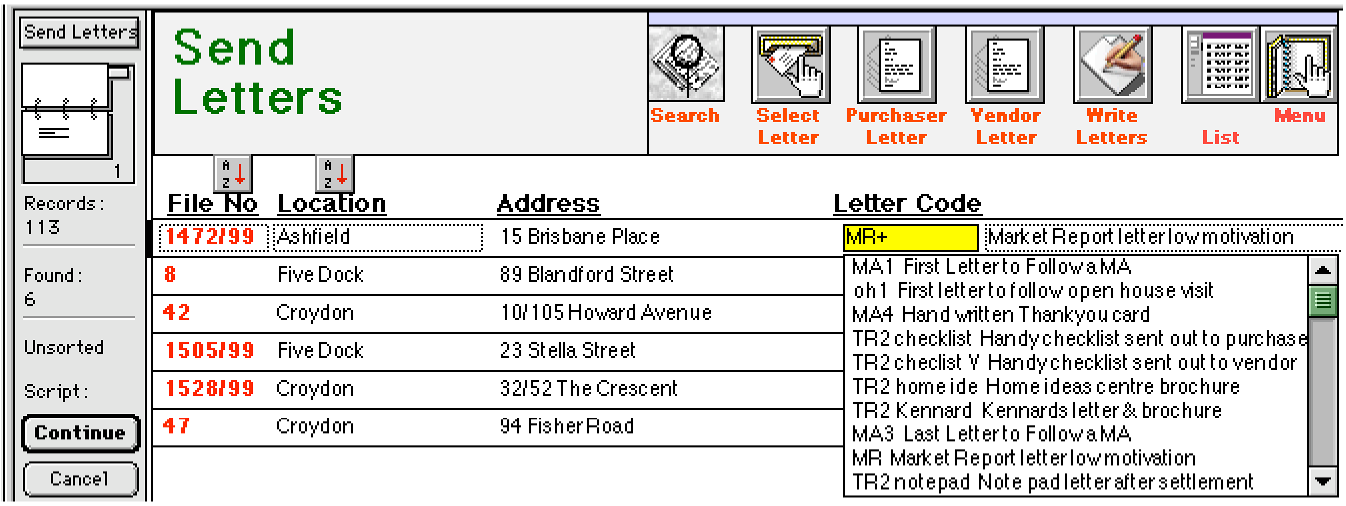
To print the same letter to a group of people, select that group of people, either from this screen, from the Search screen or from the Enter Listing screen. Once that group of people have been selected, return to the Letters screen and the list of people will be displayed at the bottom of the screen. Now click on the letter you wish to print and when the print box is displayed, select **Records Being Browsed.** This will then start printing letters to all the people on the list.

Adding or Changing Letters

This option requires a good working knowledge of Filemaker and should not be tried by novices. In any case you should make a backup of the Listing Book before attempting to add or change letters.
Full details on changing letters may be found at the end of the manual in the section ***Customizing Formats, Letters and Layouts.***

Send Letters
While the above letters are what we consider as being fixed letters that may be changed and then locked in place for future use without change, there is a further option to enter and send letters that may be changed at any time or extended to include any other letters that you wish to add to the list. The only restriction on these type of letters is the formatting of the letters which is very standard and cannot be changed. The letters are just typed and sent without any further formatting or changes involved. If you want to send a specially formatted letter with customized graphics, layouts and fonts, then you learn to use Filemaker and gain control over the formatting capabilities of the program.

The send letters option displays the following screen;



As soon as this screen is displayed a list of available letters will be displayed. These letters are those that have been entered through the **Letters** option available from the **Main Menu.** See the notes on the **Letters** option that describe how to add and edit letters in this part of the system.

Once the letter has been selected from this list, click on the **Continue** button in the left margin or press the **Enter** key on the numeric keypad. Without completing this step, the printing of letters will not work so make sure this step is completed.

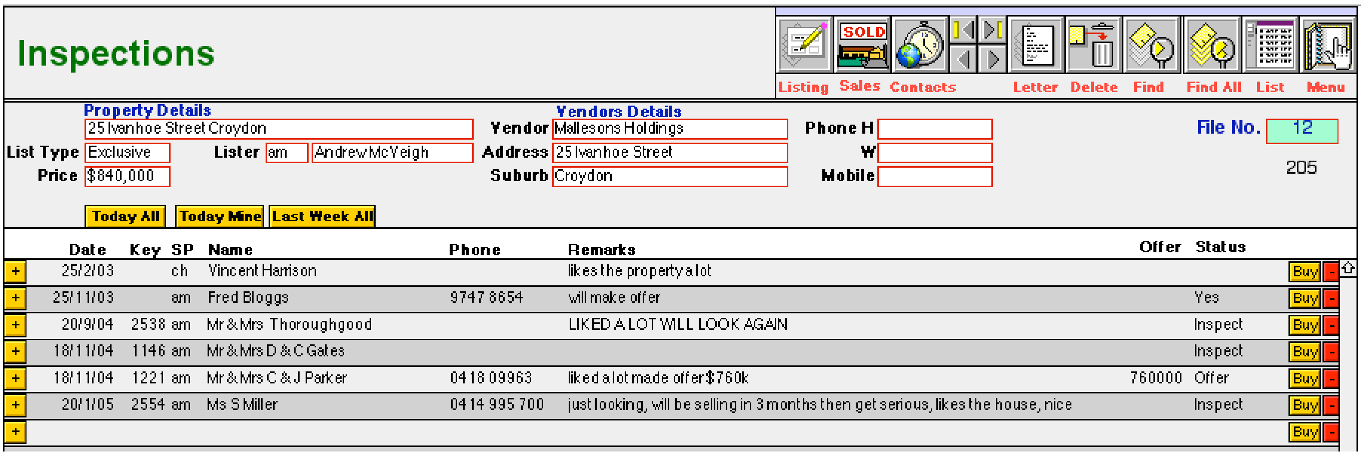
As soon as **Continue** is selected the selected letter will be merged with all of the selected vendors or purchasers. The selected letter is now ready to be sent to the selected persons. If it a letter that is to be addresses to the **Vendor** then click on the **Vendor Letter** button, if it is a letter to be address to the **Purchaser** the click on the **Purchaser Letter** button. The Print prompt will be displayed and you can select the Print Destination, Print Setup and the records the letter is to be sent to. After the letter is printed for each of the selected records, an **Contact** record will be recorded against that listing file detailing which letter was sent and when it was sent.

The other options available on this screen are;

Letters	This will take you back to letters screen.
Search	This will display the **Search** screen where a different selection of **Vendors** or **Listings** may be selected to be sent Letters.
Merge letter	This will display the list of available letters allowing a different letter to be selected and merge with the selected list of **Vendor/Purchasers**.
Purchaser Letter	This will print a letter addressed to the purchaser of the property. In this case you should make sure that the letter you have merged is a purchaser letter rather a letter intended for vendors.
Vendor Letter	This will print a letter addressed to the vendor of the property. In this case you should make sure that the letter you have merged is a vendor letter rather a letter intended for purchasers.
Write Letters	Displays the screen that allows you to add or edit letters to be sent.
List	Displays the **List Menu** screen.

Inspections

This option is used to add details of inspections made on a property for reporting back to a vendor. Details of the date, the potential purchaser and their remarks may be added so the report can be produced. Due to the large number of prospective purchasers that may end up in the **Prospects** database in relation to the number of listings that an office will ever have, the linking of **Prospect** to **Listings** is best done by using the matching **Inspections** option available in the **Prospects** Database. To use the option in the **Listings** database the **Record Key** of the prospective purchaser must be known. This **Key** is available by finding the **Prospect** in the **Prospects** database and clicking on the Record Key 1221 button to copy the key to the clipboard. Then in the **Inspections** screen, click in the **Key** field and select **past** from the **Edit** menu to link the **prospect** with the listing.



To add an extra line to the inspections just click on a blank line below the property details.

Buttons

Listings Goes back to the Listing Entry screen

Sales Goes back to the Sales Advice screen. This is useful after you have selected the **Buy** option to transfer a purchasers details to the sales advice and you need to fill in the rest of their details.

Contacts Goes to the Vendor Contact screen to add further notes.

Find Standard find button to find the right property.

Letter Will print out a letter for the vendor detailing the inspections made on their property.

Today All Click on this button to find all properties that have had an inspection on them today. Use the navigation buttons to move through the properties on the screen.

Today Mine Click on this button to find just those properties where you (the current salesperson as set in the Main Menu) are the lister and an inspection has been done today. This is used when other salespersons may have had an

inspection on one of your listings during the day, at the end of the day click on this button and view all inspections so you can report back to vendors and keep and eye on what is happening.
When the inspection is made the salesperson who did the inspection should record there initials against the inspection so the listing salesperson knows who did it.

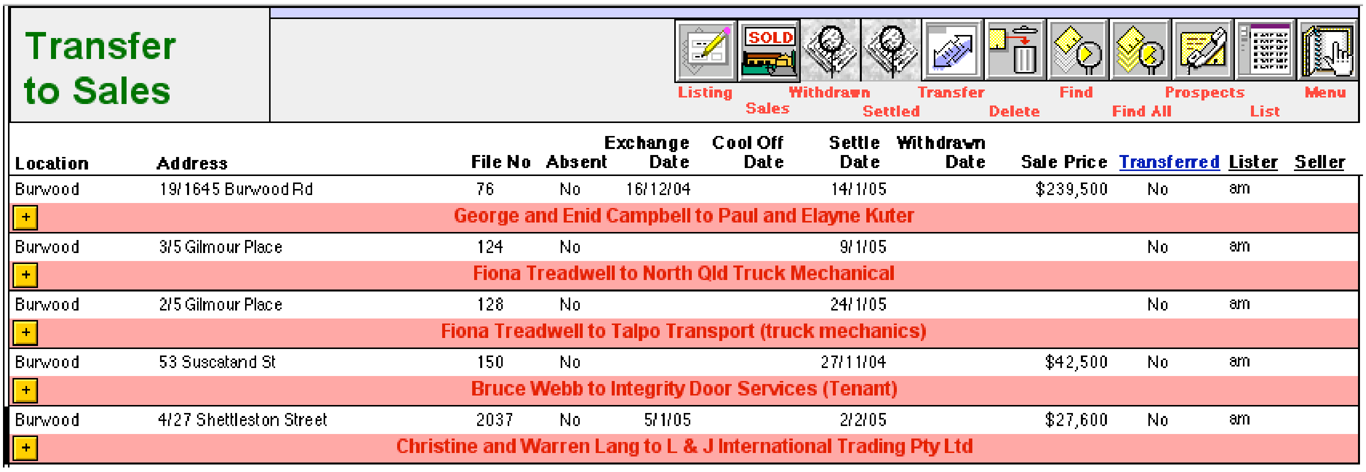
Last Week All This is a managers button that will select all properties that had an inspection in the last week. Ideal for reviewing all comments made on properties that have been inspected and also to allow the printing of a report that includes all inspections for last week.
Should you want to vary the selection period from a week you can select the **Find** button and then type in the date range required in the date field such as 1/2/06…28/2/06 or >1/2/06.

Inspection Reports

You can also use the Property Inspection report option in the **Reports** screen to select a range of inspections over different dates such as this week, last week etc to produce a number of different reports.

Transferring Sales to Prospects

This process is used to move the details of sales made out of the current listing book and into a historical record of all sales made. This record is held in the Prospects database under Vendors and may be printed out as a Sales Register as well as statistical performance reports.
Sales that have fallen over and listings that have been withdrawn can also be transferred over to the Prospects database.
After listing and sales information have been transferred, the records may be deleted from the listing book.
Prior to performing this process a complete backup should be made of the listing book.
The transfer screen appears as follows;



Location	Address	File No	Absent	Exchange Date	Cool Off Date	Settle Date	Withdrawn Date	Sale Price	Transferred	Lister	Seller
Burwood	19/1645 Burwood Rd	76	No	16/12/04		14/1/05		$239,500	No	am	
+	George and Enid Campbell to Paul and Elayne Kuter										
Burwood	3/5 Gilmour Place	124	No			9/1/05			No	am	
+	Fiona Treadwell to North Qld Truck Mechanical										
Burwood	2/5 Gilmour Place	128	No			24/1/05			No	am	
+	Fiona Treadwell to Talpo Transport (truck mechanics)										
Burwood	53 Suscatand St	150	No			27/11/04		$42,500	No	am	
+	Bruce Webb to Integrity Door Services (Tenant)										
Burwood	4/27 Shettleston Street	2037	No	5/1/05		2/2/05		$27,600	No	am	
+	Christine and Warren Lang to L & J International Trading Pty Ltd										

A detailed set of instructions on using this function are displayed at the bottom of the screen.

It is advisable to perform this process at the start of each new month and only after you have printed all reports for the previous month. The reports that should be printed first are **Sales Exchanged**, **Sales Settled**, **Sales not Proceeding**,. **Listings Withdrawn** and **Salespersons Statements**.
The preferable way to transfer sales to prospects is either when the sale has settled or the Listing has been withdrawn. That way all exchanged properties and sales not proceeding remain in the listing book until they have either been settled or withdrawn.

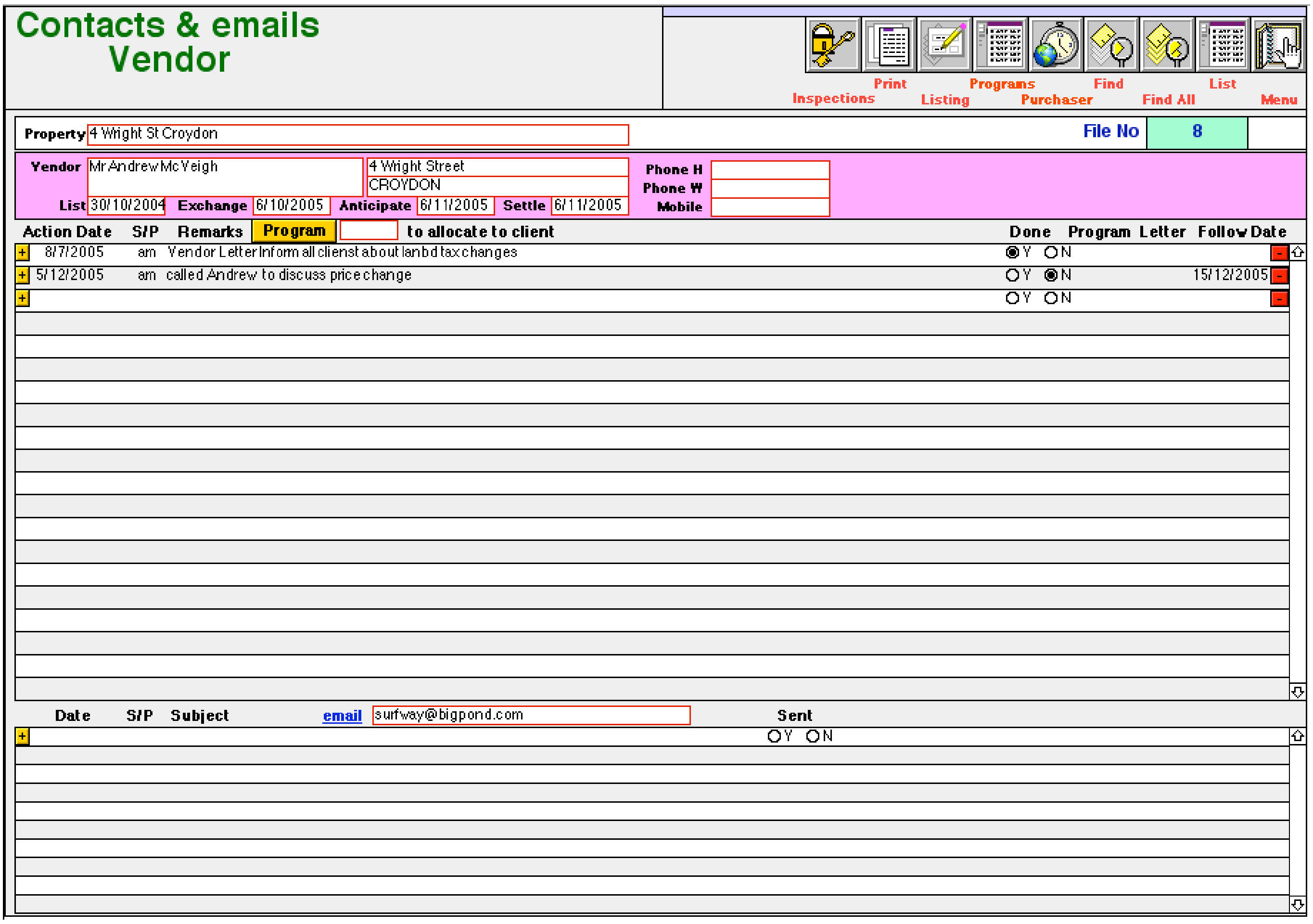
Once the sales and listings have been transferred, they then may be deleted. Note that when transferring the purchasers details to the **Prospects** database make sure the **Absent** flag is set correctly on the **Sales Detail** screen. If the flag is set to **No** (i.e. the purchaser is not going to be an absentee owner or investor), then the Purchasers name is transferred along with the property address as their new address. If the **Absent** flag is set to **Yes** then the Purchasers current address will be transferred instead of the property address. The Purchaser will be flagged as a **Vendor Future** in the **Prospects** database.
For **Vendors** the Vendors current address (not the property address) will be transferred as their new address. Therefore make sure you have updated the Vendor's address in the **Sales Details** screen before transferring the listing. The Vendor will be flagged as a **Vendor Past** in the **Prospects** database. The option is there to delete the Vendor from the **Prospects** database if they have moved out of the area and you no longer want to keep them on file.
When transferring **Withdrawn Sales** the vendors details are transferred to the Prospects database as a **Vendor Withdrawn**..

The **Transferred** heading will filter the list to those properties that have not already been transferred.

The  button will go to the **Sales Advice** screen where any details may be corrected before the property is transferred to the Prospects database.

Contacts (Vendors)

The Contacts screen is used to note down discussions and follow up notes regarding vendors and purchasers. These notes include a follow up date so they appear on a salespersons daily/weekly worksheet and activity report. The screen is displayed by selecting the **Contacts** option from the **List Menu.**



To use the screen, first find the Vendor/Purchaser you wish to make the note for. Then click on the first available line in the remarks field and start typing the note. The **Action date** will default to today and the **S/P** will default to the currently selected Salesperson selected at the **Main Menu**. The **Follow Date** is used to position the note on a future activity sheet and diary.

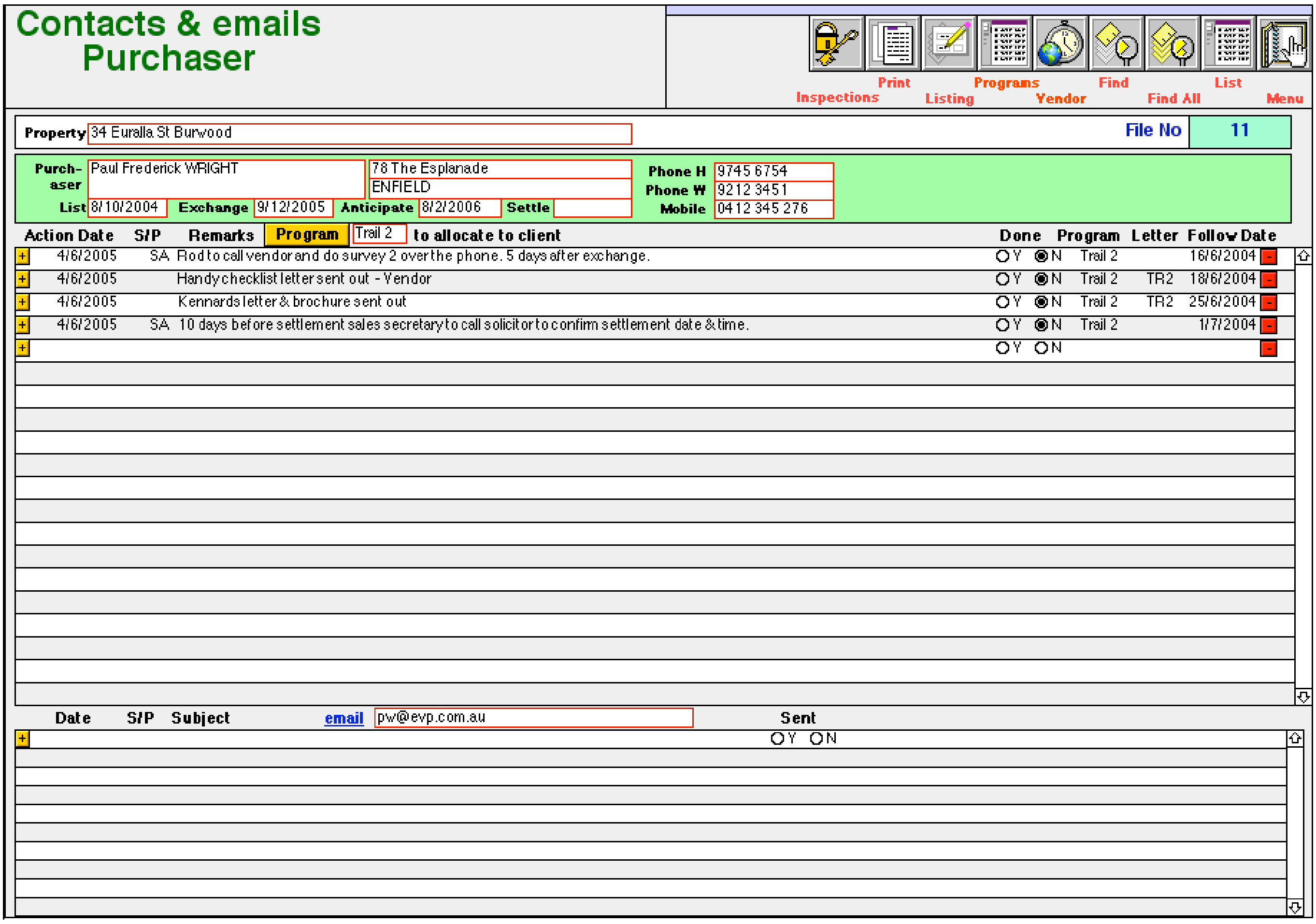
Programs and Letters

A **Marketing Program** may be allocated to a Vendor/ that automates the activities that follow. See the section on **Programs** for a full description of how to set up the **Program**.

To allocated a program to a Vendor click in the box next to **Program** and select a program from the list that pops up. Once you have selected the program, click on the **Program** button and you will be prompted to allocate the program to the Vendor. This will add any number of activities that have been set up for the program to the activity sheet for the vendor. This can include reminder notes as well as letters to be printed.

Contacts (Purchasers)

The Contacts screen is used to note down discussions and follow up notes regarding vendors and purchasers. These notes include a follow up date so they appear on a salespersons daily/weekly worksheet and activity report. The screen is displayed by selecting the **Contacts** option from the **List Menu.**



To use the screen, first find the Vendor/Purchaser you wish to make the note for. Then click on the first available line in the remarks field and start typing the note. The **Action date** will default to today and the **S/P** will default to the currently selected Salesperson selected at the **Main Menu**. The **Follow Date** is used to position the note on a future activity sheet and diary.

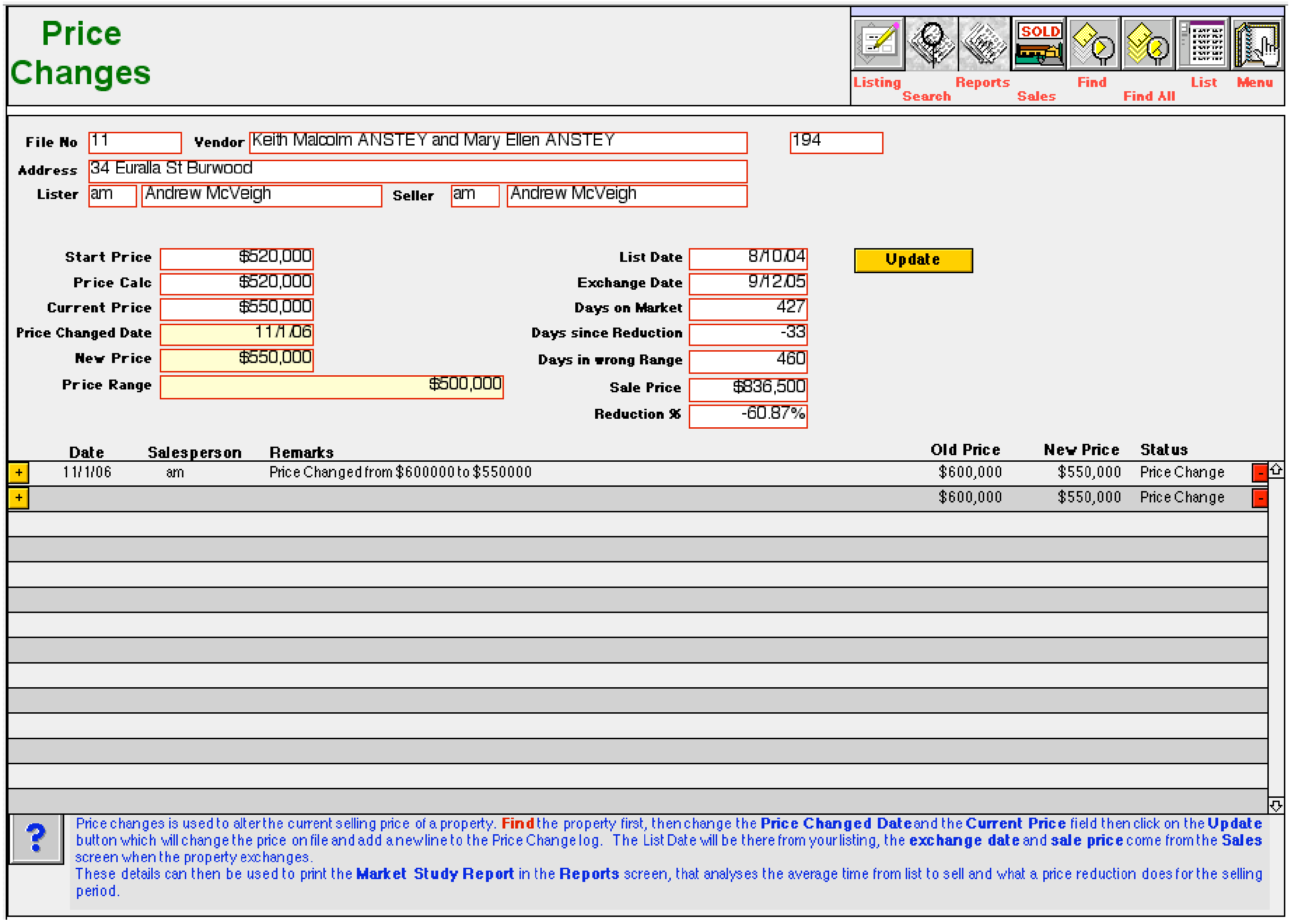
Programs and Letters

A **Marketing Program** may be allocated to a Purchaser that automates the activities that follow. See the section on **Programs** for a full description of how to set up the **Program**.

To allocated a program to a Purchaser click in the box next to **Program** and select a program from the list that pops up. Once you have selected the program, click on the **Program** button and you will be prompted to allocate the program to the Purchaser . This will add any number of activities that have been set up for the program to the activity sheet for the Purchaser . This can include reminder notes as well as letters to be printed.

Price Changes

The **Price Changes** The screen is displayed by selecting the **Price Changes** option from the **List Menu.** It is used to detail the amount and date of any changes to the list price of a property. This is then used in the **Market Study** report to calculate and report on the statistics behind each sale, that is how long a property takes to sell after a price change.



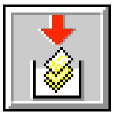
The fields that should be entered in this screen are the **Start Price** of the property which is entered the first time a reduction is made, the **Price Changed** date for this change in price and the **New Price** and the **Price Range** field if you use price ranges.

When you have entered these fields click on the 

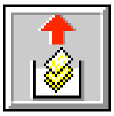
button and the current price will be changed to the new price and an extra line will be added to the list below. All price changes shown on this list will also be shown on the Inspections list screen and reports. The most recent price change will also be included in the **Market Study** report.

The main aim of the **Market Study** is to determine and average how long a property was on the market in the wrong price range before the price reduction that created the sale. A comparison is then made of the how long before and after the change was made and what the average price reduction was that created the sale, all valuable vendor conditioning information.

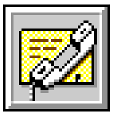
Other Options



Import This option allows you to import data into the program from another source including a remote **ListBook** or Listbook on another computer or from another office. Care must be taken if using this option so as not to either end up with duplicate records or with records with the data in the wrong fields.



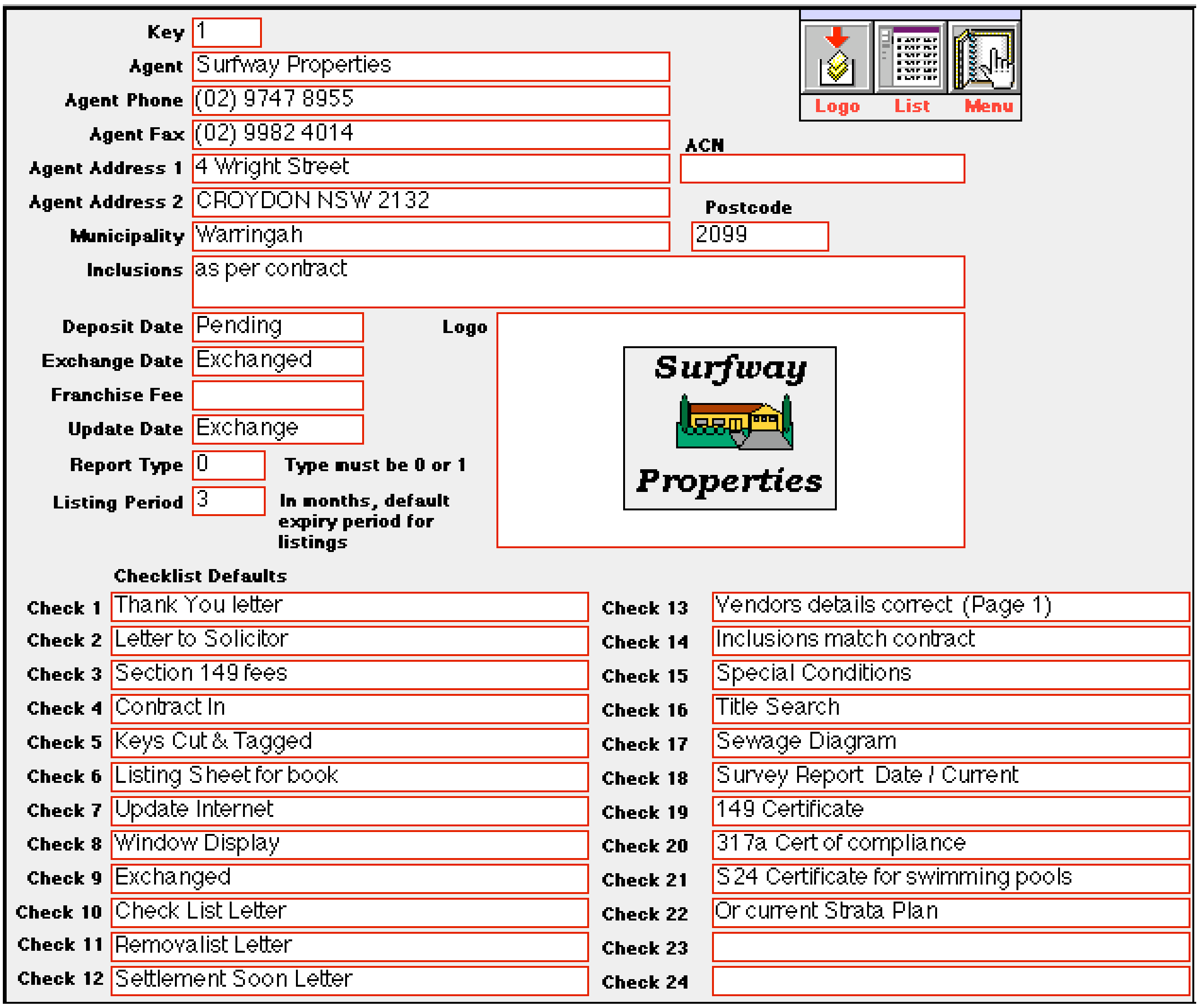
Export This option allows you to export the data to another program or **ListBook**. Again care must be taken when using this option to make sure data is not duplicated or fields do not end up in the wrong order. It is best used to send data to a word processor or spreadsheet.



Prospects This is a shortcut the other main database in the system, the **Prospects** database where all your future prospects and past sales details are held.

Agents File

The Agents file maintains details about the agent as well as defaults for the listing book. The screen may be found by selecting the **Agent** option from the Main Menu. The following screen is then displayed;



Key	1
Agent	Surfway Properties
Agent Phone	(02) 9747 8955
Agent Fax	(02) 9982 4014
Agent Address 1	4 Wright Street
Agent Address 2	CROYDON NSW 2132
Municipality	Warringah
Inclusions	as per contract
Deposit Date	Pending
Exchange Date	Exchanged
Franchise Fee	
Update Date	Exchange
Report Type	0
Listing Period	3
ACN	
Postcode	2099

Type must be 0 or 1

In months, default expiry period for listings

Logo

Logo List Menu

Checklist Defaults

Check 1	Thank You letter	Check 13	Vendors details correct (Page 1)
Check 2	Letter to Solicitor	Check 14	Inclusions match contract
Check 3	Section 149 fees	Check 15	Special Conditions
Check 4	Contract In	Check 16	Title Search
Check 5	Keys Cut & Tagged	Check 17	Sewage Diagram
Check 6	Listing Sheet for book	Check 18	Survey Report Date / Current
Check 7	Update Internet	Check 19	149 Certificate
Check 8	Window Display	Check 20	317a Cert of compliance
Check 9	Exchanged	Check 21	S24 Certificate for swimming pools
Check 10	Check List Letter	Check 22	Or current Strata Plan
Check 11	Removalist Letter	Check 23	
Check 12	Settlement Soon Letter	Check 24	

There is normally only one Agents record and this maintains details of the Agent for use in report headings and defaults for listing sheets.
You may then Tab through the fields changing them as you wish. Your Logo may be brought in as well. It should be saved in a PICT format, although Filemaker will accept and read many different kinds of formats. Any logo brought in will be printed on any of the layouts that use the logo.

Multiple Offices

Extra records may be added to the Agent file for other related offices within a group. In this case each Agent record must be given a unique key (e.g. 1, 2, or 3). Then the name and address details of that office may be changed on their own unique record.
Each salesperson must then be linked to an office so all the details of that office will appear on any letter or other document produced with Listpro.

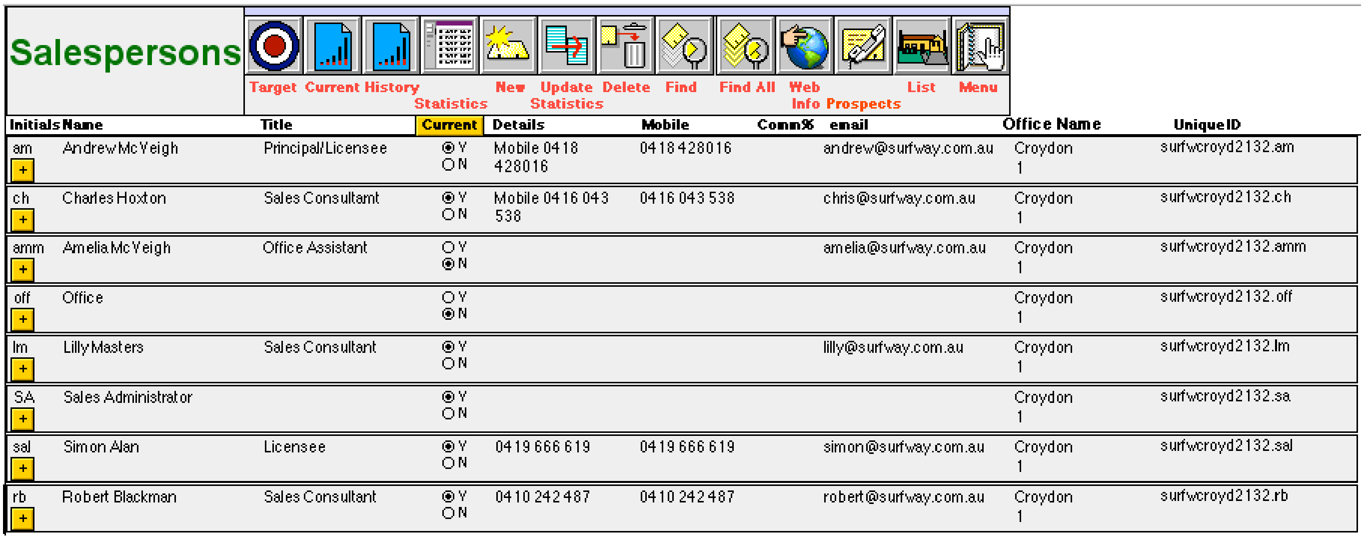
Fields

The **Deposit Date** and **Exchange Date** fields are descriptions that vary from state to state. In NSW they should be Pending and Exchanged respectively, denoting when the sale began and when it exchanged. In WA they should be Conditional and Unconditional. The **Exchange Date** is used for including properties in salespersons statements.
The **Franchise Fee** field is the default franchise fee to be paid on commissions. This percentage is deducted from commissions on sales prior to salespersons commissions being calculated.
The **Update Date** field denotes what date is to be used for the purposes of updating salespersons yearly sales figures and can either be Exchange or Settle. If Exchange is selected then the salespersons figures will be added to their monthly totals for the month that property exchanged in, and likewise if Settle is selected then the figures will be added to month when the property settles.

Other options on the screen include defaults for the listing book. You may change your default council area, or the list of inclusions on a contract or the default franchise fee to be deducted from sales commissions.
When you have finished with this screen, select **Menu** to get back to the Main Menu.

Salespersons

The Salespersons option is used to add, change or remove salespersons from the list. It is also used to look at and report on salespersons current and historical sales figures. The screen can be displayed by selecting **Salespersons** from the **Main Menu**.



Initials	Name	Title	Current	Details	Mobile	Comm%	email	Office Name	Unique ID
am	Andrew McVeigh	Principal/Licensee	◉ Y ○ N	Mobile 0418 428016	0418428016		andrew@surfway.com.au	Croydon 1	surfwcroyd2132.am
ch	Charles Hoxton	Sales Consultant	◉ Y ○ N	Mobile 0416 043 538	0416 043 538		chris@surfway.com.au	Croydon 1	surfwcroyd2132.ch
amm	Amelia McVeigh	Office Assistant	○ Y ◉ N				amelia@surfway.com.au	Croydon 1	surfwcroyd2132.amm
off	Office		○ Y ◉ N					Croydon 1	surfwcroyd2132.off
lm	Lilly Masters	Sales Consultant	◉ Y ○ N				lilly@surfway.com.au	Croydon 1	surfwcroyd2132.lm
SA	Sales Administrator		◉ Y ○ N					Croydon 1	surfwcroyd2132.sa
sal	Simon Alan	Licensee	◉ Y ○ N	0419 666 619	0419 666 619		simon@surfway.com.au	Croydon 1	surfwcroyd2132.sal
rb	Robert Blackman	Sales Consultant	◉ Y ○ N	0410 242 487	0410 242 487		robert@surfway.com.au	Croydon 1	surfwcroyd2132.rb

The options on this screen are to create a **New** salespersons record, alter an existing record or to add a photo to the salespersons file. You can scroll through the list of salespersons, then click on the one you wish to alter. Then Tab to the fields to be changed.

To remove a salesperson, firstly select the salesperson by clicking on the salespersons record, then select the **Delete** button. You will be prompted first before the record is deleted. It is not wise to remove salespersons even if they no longer work for you. The Sales Register report that holds details of all sales made keeps details of which salesperson made the sale, so if you remove them the Sales Register will lose the details of who made the sale. It is better to leave their initials in the database but change their name to a current salesperson so their name will appear on the bottom of letters but the sale will still be listed against the original salespersons initials. In addition any salesperson history records will also be removed if the salesperson is removed.

Other Options

Current This will display a screen showing the salespersons current year sales figures.

History This will display all salespersons with a summary of previous years sales figures. From this summary you may select a years figures to be viewed in full detail.

Statistics This displays the salespersons statistics window showing the accumulation of monthly statistics on each salespersons activities.

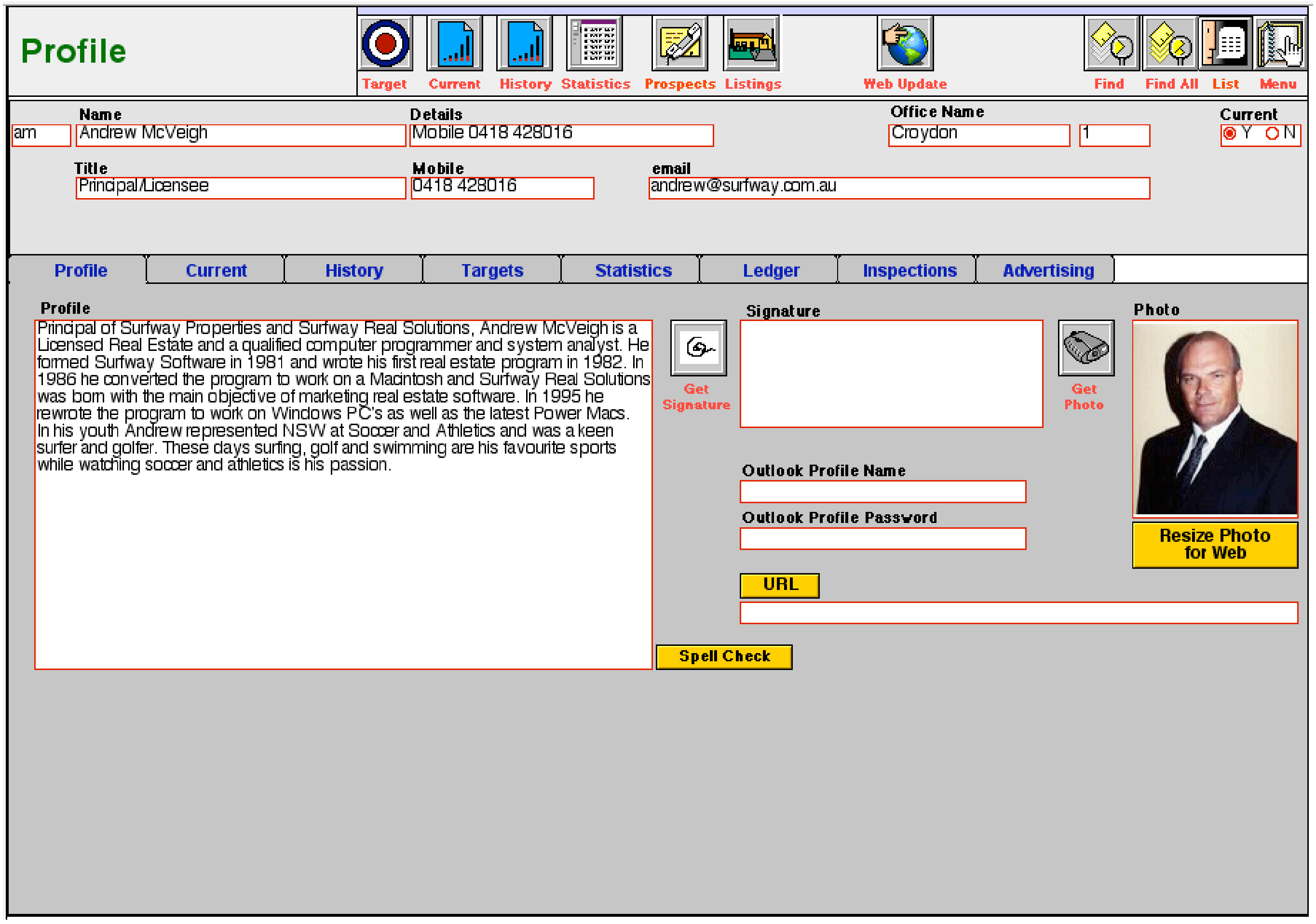
Update Statistics This option must be run monthly to update the salespersons statistics. Usually you will run this process after the month is complete and all data has been updated for the previous month. In this case when running this option select the **Previous** button so it the month just completed gets updated. You can run this process any number of times so if for instance the first run does not show up all the statistics you think should be there, then complete the data entry process and then Update again. Only the current month or previous month can be updated so you must update within the month. See **Statistics** for further details.

+ This will take you to further details and statistics about the salesperson.

Menu Select this button to return to the Main menu.

Further Details

Profile Screen

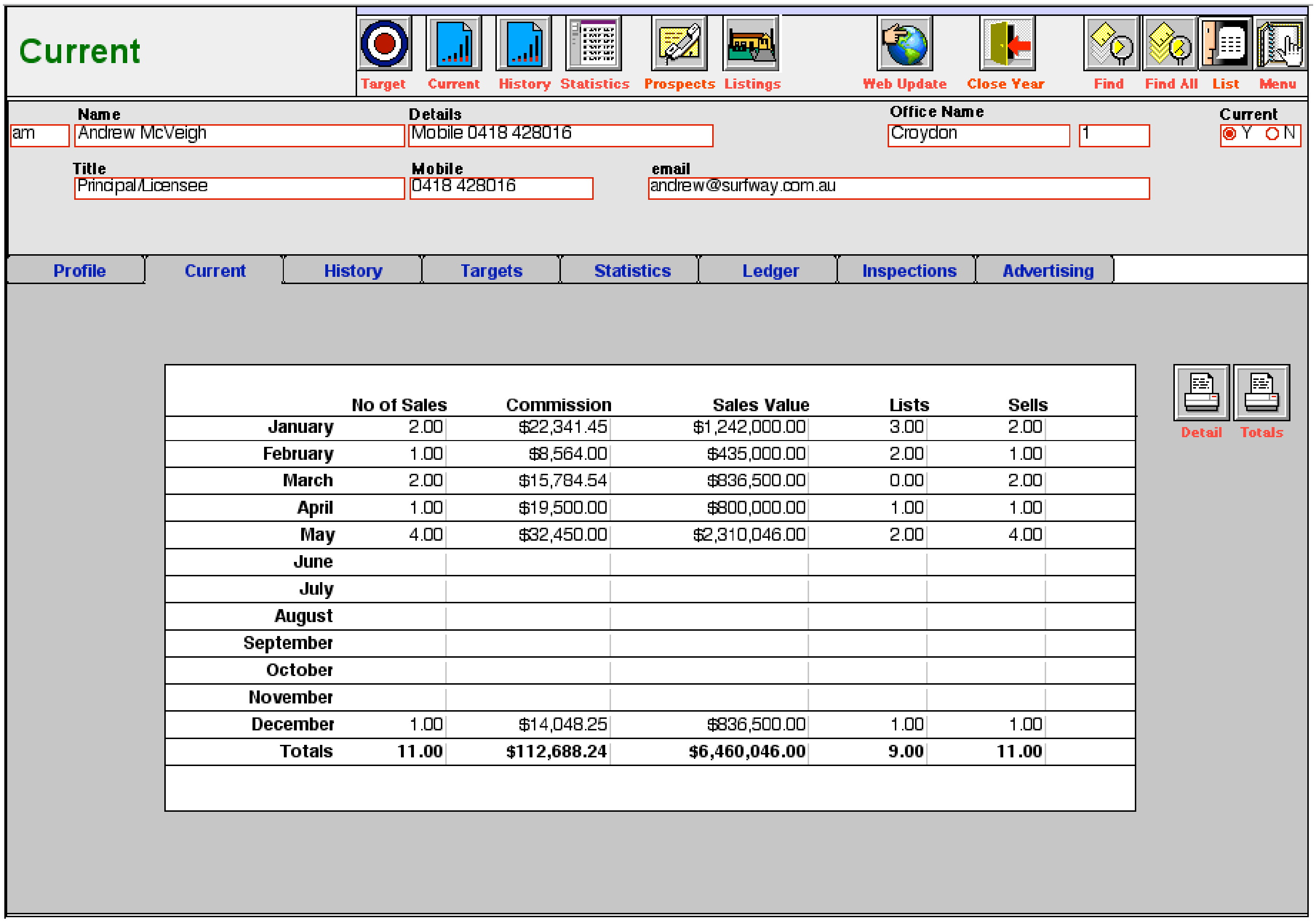


This screen shows the profile of the salesperson. The main reason for updating this profile is to upload it to a web site. Alternative uses are to include the photo of the salesperson on brochures and letters and advertising materials.
The signature can also be scanned and imported to be used at the bottom of merge letters.

The Outlook profile name and password can be entered to allow you to synchronise prospects and contacts with your Outlook address book and task list. This only works if you are using Exchange Server.

Current Sales Figures

The current year sales figures for a salesperson may be viewed by clicking on the **Current** button on any of the salespersons screens. The figures in this screen are updated when you select the **Update** option in the **Sales Details** screen in the **Listing Book**. The screen appears as follows;

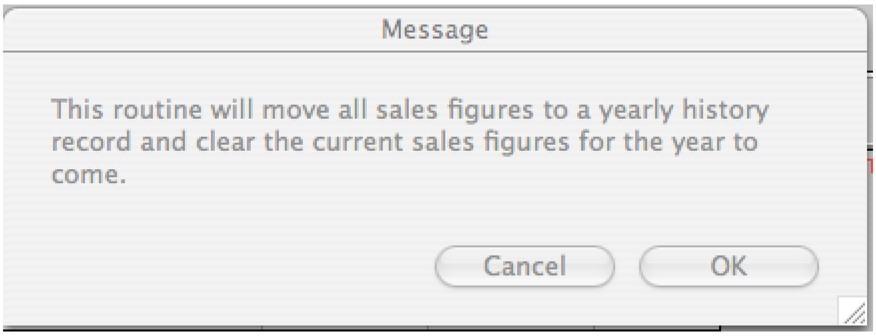


	No of Sales	Commission	Sales Value	Lists	Sells
January	2.00	$22,341.45	$1,242,000.00	3.00	2.00
February	1.00	$8,564.00	$435,000.00	2.00	1.00
March	2.00	$15,784.54	$836,500.00	0.00	2.00
April	1.00	$19,500.00	$800,000.00	1.00	1.00
May	4.00	$32,450.00	$2,310,046.00	2.00	4.00
June					
July					
August					
September					
October					
November					
December	1.00	$14,048.25	$836,500.00	1.00	1.00
Totals	11.00	$112,688.24	$6,460,046.00	9.00	11.00

Buttons

Find	To find a salespersons current figures.
Find All	To show all salespersons figures. Use the Page Up and Down to scroll through all salespersons.
List	Will display the **Salespersons List** screen as shown above.
Detail	Will print out a report of all salespersons current yearly figures.
Totals	Will display a report of all sales totals of all salespersons for the year.
History	Will allow you to view a salespersons sales figures for any year.

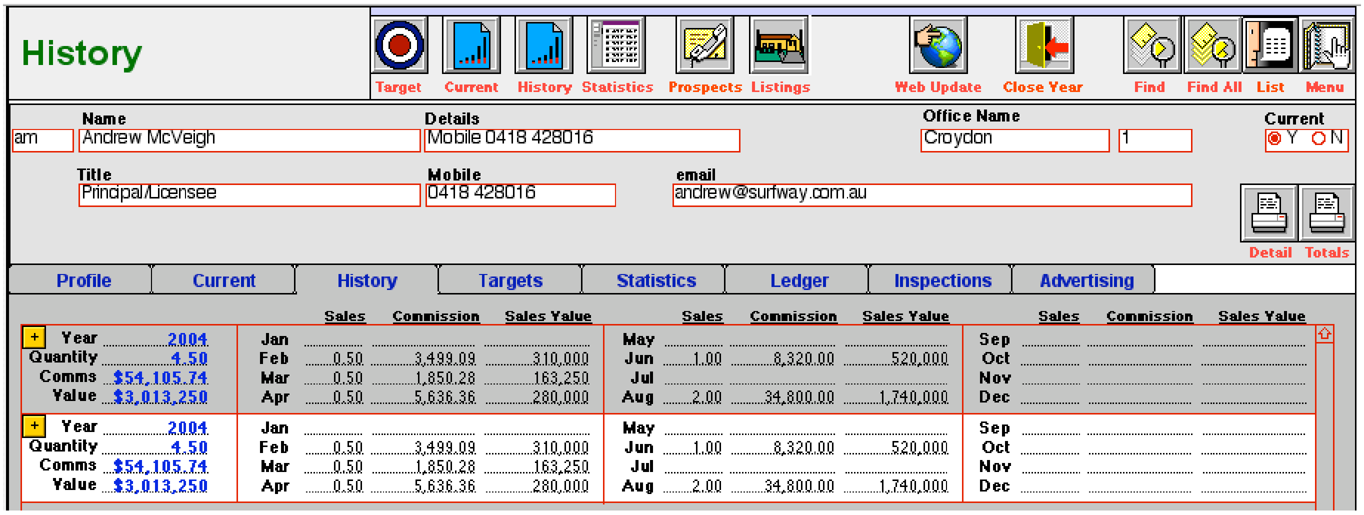
Close Year This will close a years figures off, creating a history record using the current years figures then clearing all the current figures for all salespersons ready for the next year. When you select this option the following warning will appear;



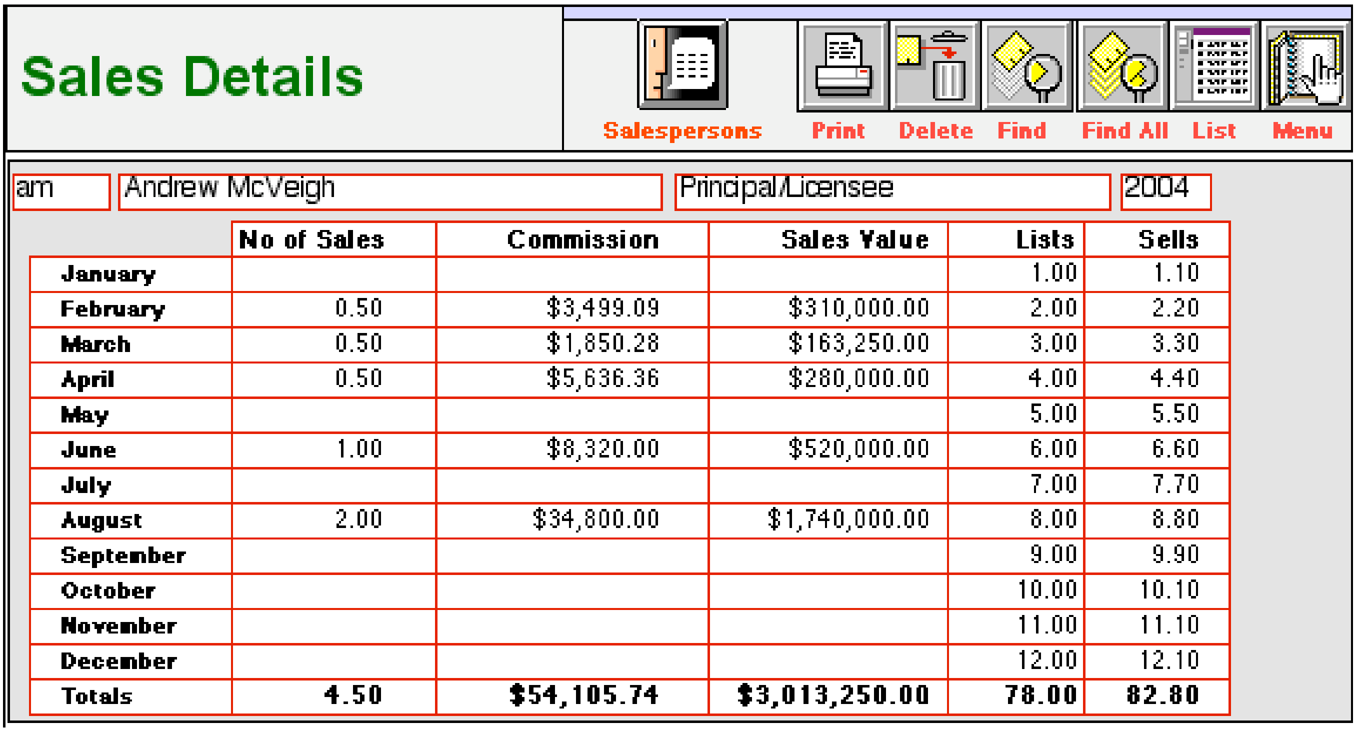
Select **OK** to start the process, or **Cancel** if you are not sure. It is a good idea to make a backup before you Close the Year off.

Salespersons History

The History screen allows you to select a salesperson and a year to view sales history for. Simply click on the **Detail** button beside the history record you wish to view and that record will be displayed in detail. The up and down arrow may be used to scroll through all the years history before selecting the year to view.



Once you have clicked on  the full detail screen will appear as follows;



Sales Details

Salespersons Print Delete Find Find All List Menu

am | Andrew McVeigh | Principal/Licensee | 2004

	No of Sales	Commission	Sales Value	Lists	Sells
January				1.00	1.10
February	0.50	$3,499.09	$310,000.00	2.00	2.20
March	0.50	$1,850.28	$163,250.00	3.00	3.30
April	0.50	$5,636.36	$280,000.00	4.00	4.40
May				5.00	5.50
June	1.00	$8,320.00	$520,000.00	6.00	6.60
July				7.00	7.70
August	2.00	$34,800.00	$1,740,000.00	8.00	8.80
September				9.00	9.90
October				10.00	10.10
November				11.00	11.10
December				12.00	12.10
Totals	**4.50**	**$54,105.74**	**$3,013,250.00**	**78.00**	**82.80**

Buttons

Find To find another history record.

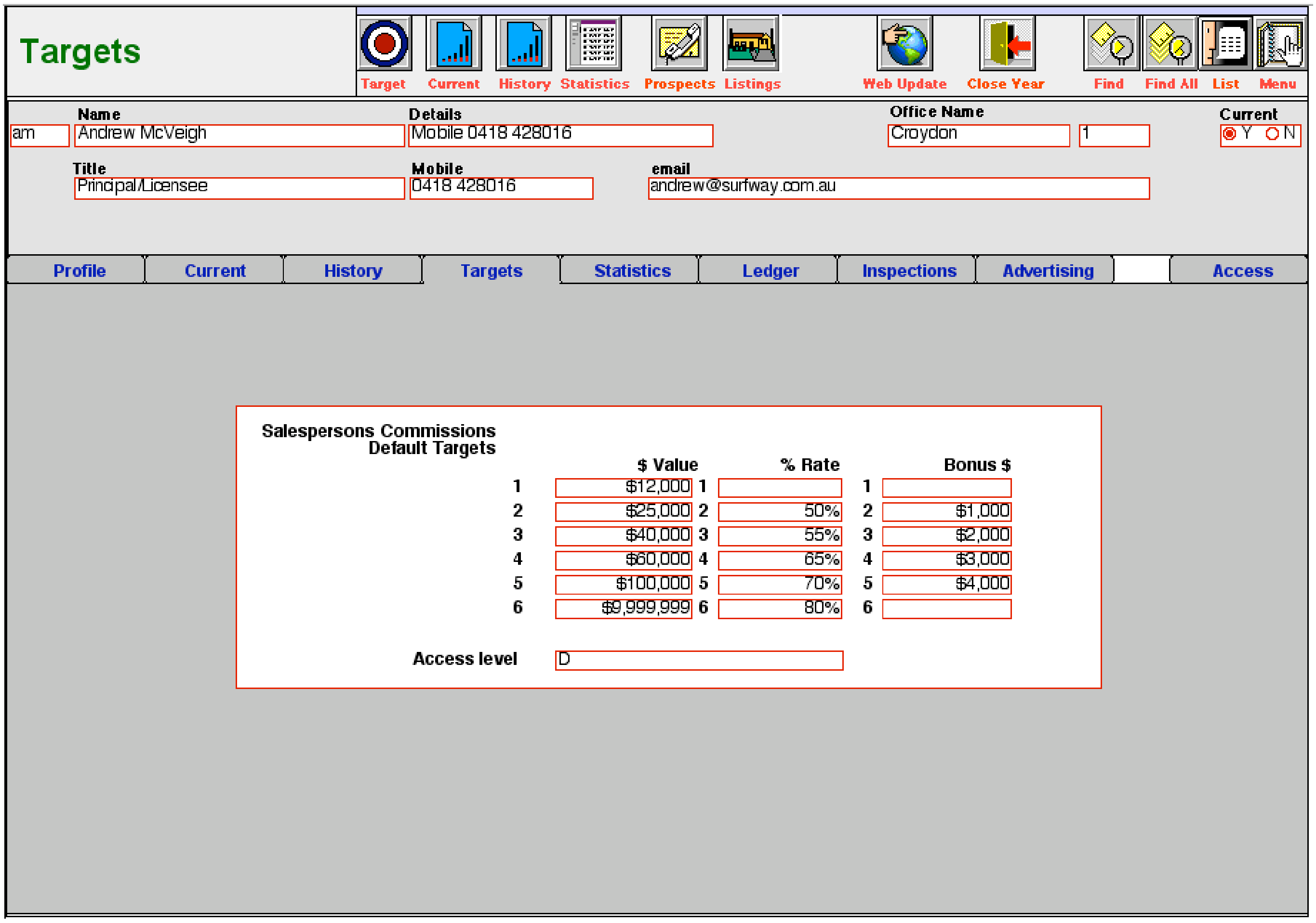
Current To display that salespersons current year sales figures.

Salespersons To display the previous **History** screen thus allowing another selection.

Print To print out a detailed report for all salespersons for that year selected. If no year has been selected you will be prompted either to cancel or print the report for all years.

Salespersons Targets

The details on this screen are used to set up the sales targets applicable to this salesperson. Targets are used for the calculation of commission based on the sales details entered on each sales advice.



Targets may be monthly or quarterly, they may be scaled as in the example above or single figure suitable for the credit debit type of commission system.

Targets

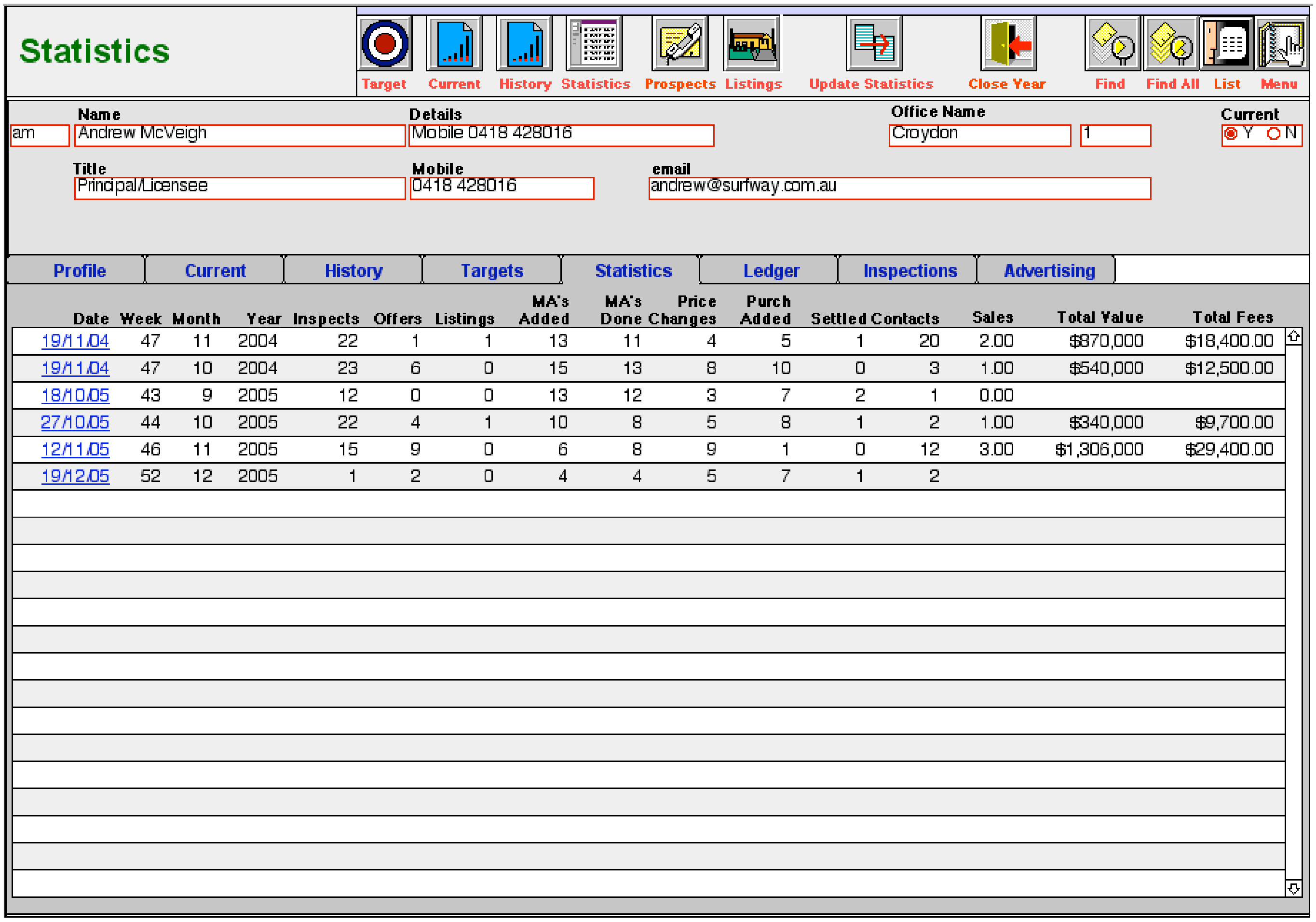
Targets are used when a salesperson has to reach a certain commission figure each month or quarter before they are paid. Once they reach this figure (Value field) the % Rate will be applied to all commission earnt over this value and up to the second value. Once the second value has been reached then any sales over this amount will use the second % Rate to calculate the commission earned up to the third value and so on.
The bonus amount is added to the % rate figure once a target has been achieved.

Credit Debit

In a credit debit system a single value and rate is entered on the first line. The value is altered each month depending on how much the salesperson has earned the previous month. So the value is altered to take into account and extra debit that applies plus superannuation and other debits. If the salesperson has reach target the previous month then value is only altered to reflect any extra superannuation that has been paid. In a credit debit system the value in line 1 will always be changed each month.

Salespersons Statistics

Salespersons Statistics is a method of accumulating statistics about the activities of all the salespersons within the office. These statistics are accumulated each month by running the **Update Statistics** option in the **Salespersons List** screen. This process updates the following statistics for the selected month; Total new listings, total sales (exchanges). gross dollar value of sales, gross dollar value of commission, total market appraisals, total inspections, total contact activities, total new purchasers.



Date	Week	Month	Year	Inspects	Offers	Listings	MA's Added	MA's Done	Price Changes	Purch Added	Settled	Contacts	Sales	Total Value	Total Fees
19/11/04	47	11	2004	22	1	1	13	11	4	5	1	20	2.00	$870,000	$18,400.00
19/11/04	47	10	2004	23	6	0	15	13	8	10	0	3	1.00	$540,000	$12,500.00
18/10/05	43	9	2005	12	0	0	13	12	3	7	2	1	0.00		
27/10/05	44	10	2005	22	4	1	10	8	5	8	1	2	1.00	$340,000	$9,700.00
12/11/05	46	11	2005	15	9	0	6	8	9	1	0	12	3.00	$1,306,000	$29,400.00
19/12/05	52	12	2005	1	2	0	4	4	5	7	1	2			

The **Update** process has two options, **Current** month or **Previous** month. Typically the month will have been completed by the time all of the data that makes up the statistics has been entered, so the normal update option will be **Previous** month. The **Current** month option can be used to update the current months statistics at any time during the month, and may be run any number of times to continually update the statistics. Only when all the data entry for the month has been completed will the Update yield the final figures for the month. Only the current or previous months statistics can be updated so if using the Previous month option, this can be done any time in the following month but must be done within that following month. After the Update option has been run, you will be asked to print the report for the month which is a good idea to agree with just to check on the statistics updated.

The **Sales Statistics** screen is displayed by selecting the **Statistics** option from the Salespersons screen. This can be used if you wish to print statistics for a quarter or a whole year at a time. Simply click on the **Last Year** or **This Year** button for a whole year or the **Q1** to **Q4** button to select a quarter, then click on the **Print** button to print the **Statistics** report.

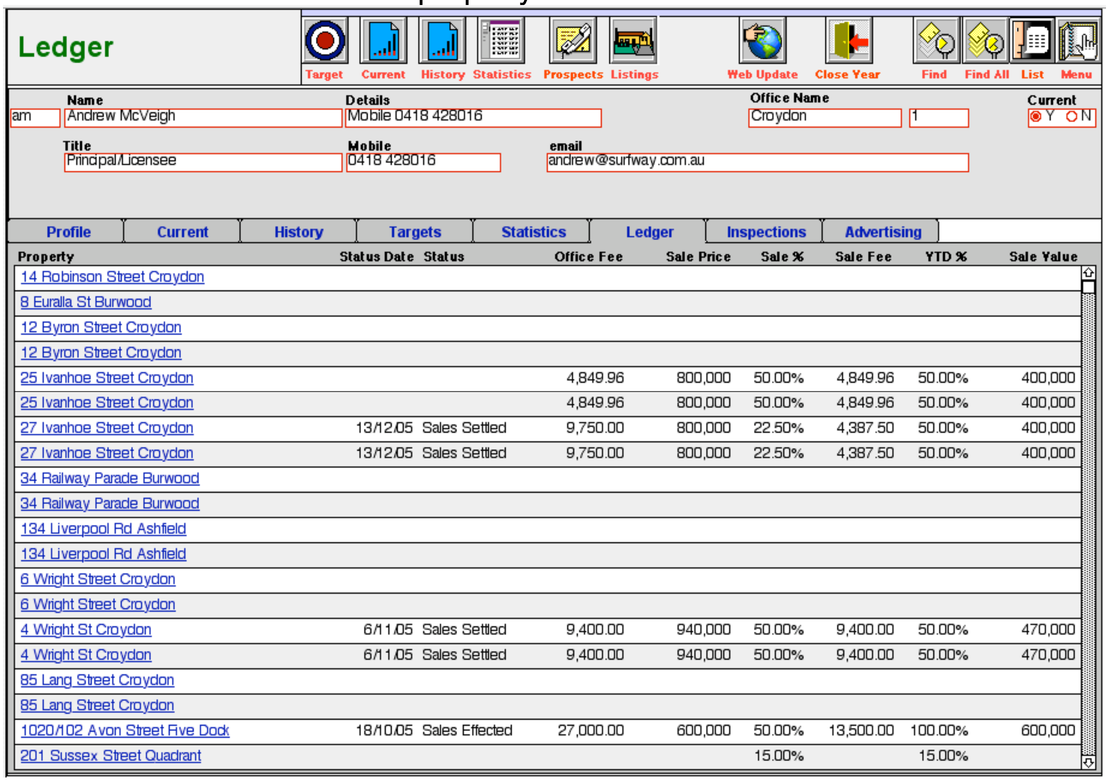
If you forget to update a particular month, then the only way to redo it is by altering the system date on the computer back a month or two then running the update. You must be careful using this method as some of the data that is used to complete the statistics may have been deleted e.g. a listing may have been sold, transferred to prospects and then deleted so they will be missing from the Sales statistics. It is obviously far better to remember to update after the end of each month.

The updating of statistics is like taking a snapshot of what is happening in your office at any one time. The moment the snapshot has been taken, the picture changes so the next snapshot will be different. In the same way extra data and activities are being entered into Listpro so the next update will capture different totals. This is why you can run progressive updates through out the month which will then show monthly accumulative totals, but make sure you run the final update for the month one or two days after the month is over and all data has been entered. Then select the Last Month option for the update.

The progressive totals that you accumulate during the month are ideal for presentation at sales meetings so this update should be run before each meeting using the Current Month option.

Ledger

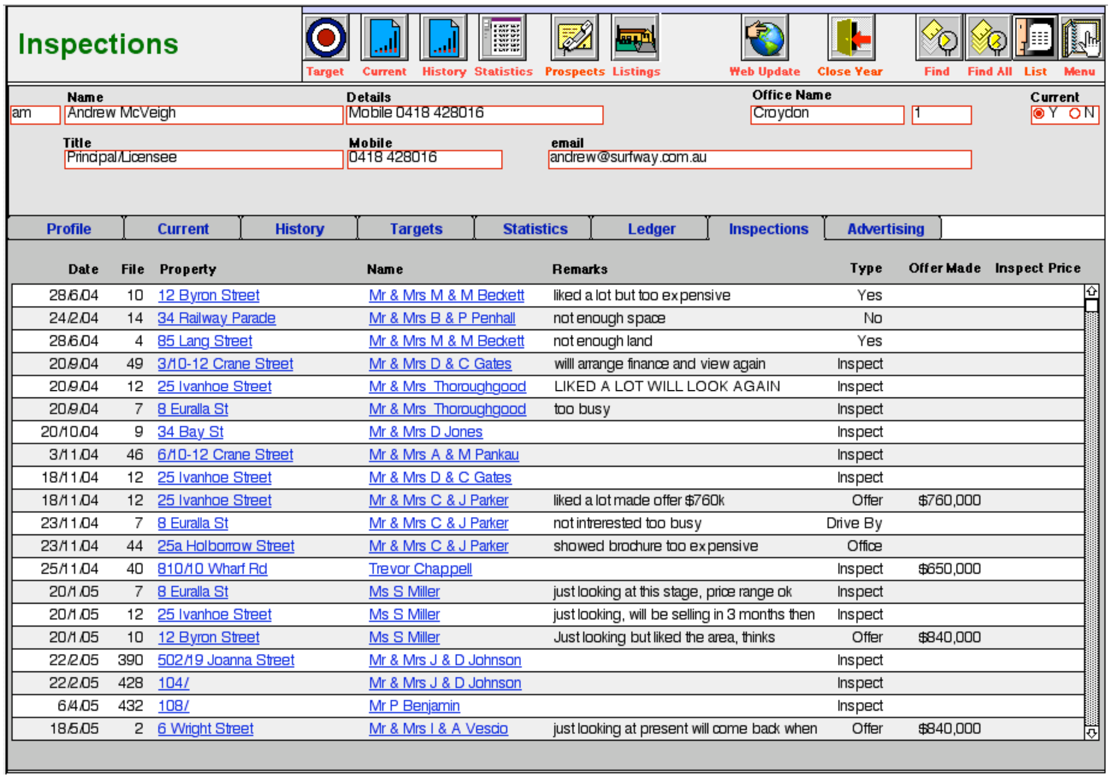
The ledger screen will show you all properties that a salesperson is currently involved with either as a lister or as the seller of the property.



Property	Status Date	Status	Office Fee	Sale Price	Sale %	Sale Fee	YTD %	Sale Value
14 Robinson Street Croydon								
8 Euralla St Burwood								
12 Byron Street Croydon								
12 Byron Street Croydon								
25 Ivanhoe Street Croydon			4,849.96	800,000	50.00%	4,849.96	50.00%	400,000
25 Ivanhoe Street Croydon			4,849.96	800,000	50.00%	4,849.96	50.00%	400,000
27 Ivanhoe Street Croydon	13/12/05	Sales Settled	9,750.00	800,000	22.50%	4,387.50	50.00%	400,000
27 Ivanhoe Street Croydon	13/12/05	Sales Settled	9,750.00	800,000	22.50%	4,387.50	50.00%	400,000
34 Railway Parade Burwood								
34 Railway Parade Burwood								
134 Liverpool Rd Ashfield								
134 Liverpool Rd Ashfield								
6 Wright Street Croydon								
6 Wright Street Croydon								
4 Wright St Croydon	6/11/05	Sales Settled	9,400.00	940,000	50.00%	9,400.00	50.00%	470,000
4 Wright St Croydon	6/11/05	Sales Settled	9,400.00	940,000	50.00%	9,400.00	50.00%	470,000
85 Lang Street Croydon								
85 Lang Street Croydon								
1020/102 Avon Street Five Dock	18/10/05	Sales Effected	27,000.00	600,000	50.00%	13,500.00	100.00%	600,000
201 Sussex Street Quadrant					15.00%		15.00%	

Inspections

The Inspection tab lists all inspection on current and sold properties for that salesperson.

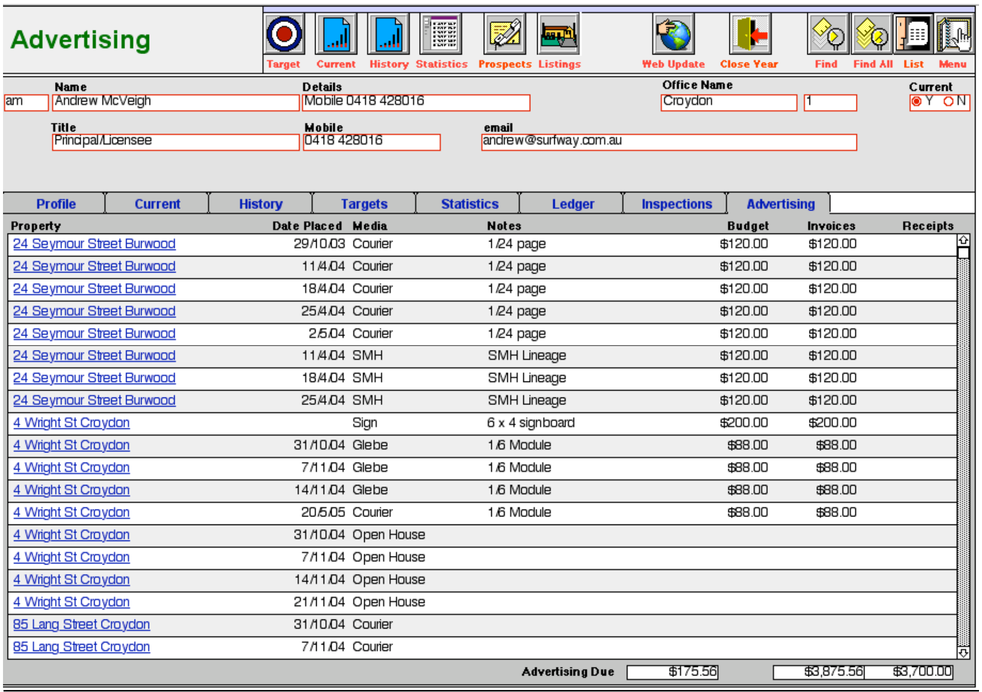


Date	File	Property	Name	Remarks	Type	Offer Made	Inspect Price
28/6/04	10	12 Byron Street	Mr & Mrs M & M Beckett	liked a lot but too expensive	Yes		
24/2/04	14	34 Railway Parade	Mr & Mrs B & P Penhall	not enough space	No		
28/6/04	4	85 Lang Street	Mr & Mrs M & M Beckett	not enough land	Yes		
20/9/04	49	3/10-12 Crane Street	Mr & Mrs D & C Gates	will arrange finance and view again	Inspect		
20/9/04	12	25 Ivanhoe Street	Mr & Mrs Thoroughgood	LIKED A LOT WILL LOOK AGAIN	Inspect		
20/9/04	7	8 Euralla St	Mr & Mrs Thoroughgood	too busy	Inspect		
20/10/04	9	34 Bay St	Mr & Mrs D Jones		Inspect		
3/11/04	46	6/10-12 Crane Street	Mr & Mrs A & M Pankau		Inspect		
18/11/04	12	25 Ivanhoe Street	Mr & Mrs D & C Gates		Inspect		
18/11/04	12	25 Ivanhoe Street	Mr & Mrs C & J Parker	liked a lot made offer $760k	Offer	$760,000	
23/11/04	7	8 Euralla St	Mr & Mrs C & J Parker	not interested too busy	Drive By		
23/11/04	44	25a Holborrow Street	Mr & Mrs C & J Parker	showed brochure too expensive	Office		
25/11/04	40	810/10 Wharf Rd	Trevor Chappell		Inspect	$650,000	
20/1/05	7	8 Euralla St	Ms S Miller	just looking at this stage, price range ok	Inspect		
20/1/05	12	25 Ivanhoe Street	Ms S Miller	just looking, will be selling in 3 months then	Inspect		
20/1/05	10	12 Byron Street	Ms S Miller	Just looking but liked the area, thinks	Offer	$840,000	
22/2/05	390	502/19 Joanna Street	Mr & Mrs J & D Johnson		Inspect		
22/2/05	428	104/	Mr & Mrs J & D Johnson		Inspect		
6/4/05	432	108/	Mr P Benjamin		Inspect		
18/5/05	2	6 Wright Street	Mr & Mrs I & A Vescio	just looking at present will come back when	Offer	$840,000	

You may view the inspections for each property by clicking on the property address link on any line. Alternatively you can look at all inspections for a purchaser by clicking on the purchaser name link.

Advertising

This screen will display all advertising that has been scheduled for each property where the salesperson is the lister of that property.



Property	Date Placed	Media	Notes	Budget	Invoices	Receipts
24 Seymour Street Burwood	29/10/03	Courier	1/24 page	$120.00	$120.00	
24 Seymour Street Burwood	11/4/04	Courier	1/24 page	$120.00	$120.00	
24 Seymour Street Burwood	18/4/04	Courier	1/24 page	$120.00	$120.00	
24 Seymour Street Burwood	25/4/04	Courier	1/24 page	$120.00	$120.00	
24 Seymour Street Burwood	2/5/04	Courier	1/24 page	$120.00	$120.00	
24 Seymour Street Burwood	11/4/04	SMH	SMH Lineage	$120.00	$120.00	
24 Seymour Street Burwood	18/4/04	SMH	SMH Lineage	$120.00	$120.00	
24 Seymour Street Burwood	25/4/04	SMH	SMH Lineage	$120.00	$120.00	
4 Wright St Croydon		Sign	6 x 4 signboard	$200.00	$200.00	
4 Wright St Croydon	31/10/04	Glebe	1/6 Module	$88.00	$88.00	
4 Wright St Croydon	7/11/04	Glebe	1/6 Module	$88.00	$88.00	
4 Wright St Croydon	14/11/04	Glebe	1/6 Module	$88.00	$88.00	
4 Wright St Croydon	20/5/05	Courier	1/6 Module	$88.00	$88.00	
4 Wright St Croydon	31/10/04	Open House				
4 Wright St Croydon	7/11/04	Open House				
4 Wright St Croydon	14/11/04	Open House				
4 Wright St Croydon	21/11/04	Open House				
85 Lang Street Croydon	31/10/04	Courier				
85 Lang Street Croydon	7/11/04	Courier				

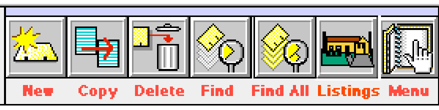
Advertising Due $175.56 $3,875.56 $3,700.00

Solicitors

This option can be used to maintain a list of all the solicitors that you normally deal with. Each solicitor is given a code that can be accessed when adding a listing or adding a purchasers details to the listing.

More than one person from the same solicitors office can be added to the list so that you can simplify the process of entering solicitors details, as well as producing a reference list of all solicitors.
To display the **Solicitors** screen, click on the **Solicitors** button on the **Main Menu** or the Solicitors buttons in the **List Book Entry** screen or **Sales Details** screen.

Solicitors



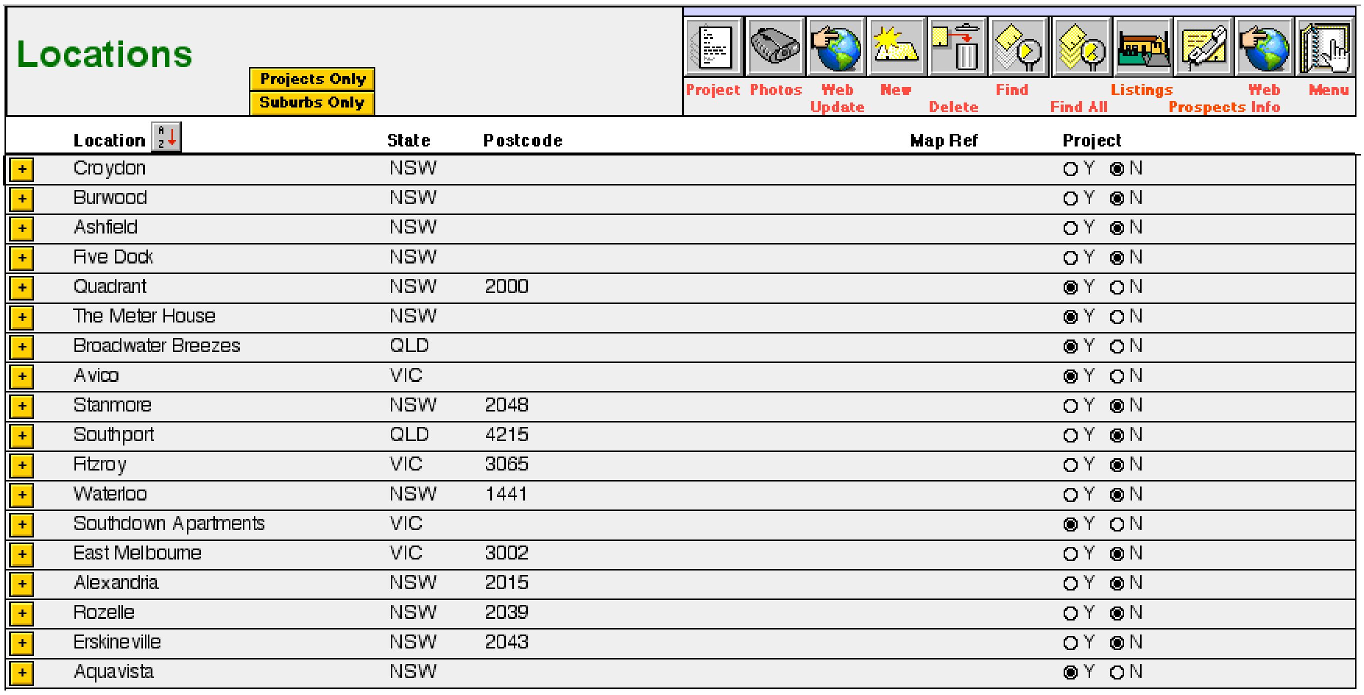
Key	Solicitor	Firm	Salutation	Address 1	Address 2	Phone	Fax	Mobile	Email	DX
L G Parke	Lindsay Parker	L G Parker & Co	Lindsay	1st Floor, 644 Pittwater Road	BROOKVALE NSW 2100	02 9938 4177	02 9938 2216			
Williams	Barry Woolf	Williams Woolf & Zuur	Barry	19 Pacific Parade	DEE WHY NSW 2099	02 9981 1399	02 9982 1849			P.O.Box653 Dee Why
WoodTW	Tricia Westall	Wood Linden Marshall Williams	Tricia	696 Pittwater Road	BROOKVALE NSW 2100	02 9938 2444	02 9938 1675			626 Sydney
McCooe &	Charles McCooe	McCooe & McCooe	Charles	Chancery Chambers, 8	MANLY NSW 2095	02 9977 6788	02 9977 6069			419 Sydney
O'Brien C		O'Brien Connors & Kennett	Mr Kennett	Level 2, 22-28 Fisher Road	DEE WHY NSW 2099	02 9982 1655	02 9982 1066			
THWalkH	Stephen Hedges	T H Walker, Hedges & Co	Stephen	1st Floor, 14 Starkey Street	FORESTVILLE NSW 2087	9451 3611	02 9451 5714			21303 Forestville
JamesRW	Robyn Wauchop	James Dive Partners	Robyn	681 Pittwater Road	DEE WHY NSW 2099	02 9981 1766	02 9971 2164			
C R Elvy	Craig Elvy	C R Elvy & Associates	Craig	1/7-9 Pittwater Road	MANLY NSW 2095	02 9977 7200	02 9977 8317			
StauntonJ	Janette Gatt	Staunton & Thompson	Janette	22 Central Avenue	MANLY NSW 2099	02 9977 5000	02 9977 0653			
Gary	Gary Stewart	Gary Stewart & Associates	Gary	4/2-10 Pittwater Road	DEE WHY NSW 2099	02 9977 7277	02 9977 0305			9202 Manly
TWMcCull	Terry McCully	T W McCully	Terry	45 Innes Road	MANLY VALE NSW 2093	02 9948 4230	02 9907 9107			
Wili	Lex Zuur	Wiliams Woolf & Zuur	Lex	19 Pacific Parade	DEE WHY NSW 2099	02 9981 1399	02 9982 1849			
HamerMH	Michael Hamer	Hamer & Hamer	Michael	The Centre, Glen Street	BELROSE NSW 2085	02 9451 9399	02 9451 2424			
THWalker	Tom Walker	T H Walker	Tom	1st Floor, Darley House, Darley	FORESTVILLE NSW 2087	02 9453 3044	02 9453 3141			21311 Forestville
Matthew &	Tommy Smith	Matthews & Severson	Tommy	1/2a Waters Road	NEUTRAL BAY NSW 2089	02 9953 9930	02 9953 9925			
Michael RH	Rosemary Hennell	Michael Clarke & Assoc	Rosemary	1338 Pittwater Road	NARRABEEN NSW 2101	02 9913 7334	02 9913 7960			9905 Mona Vale
Thom	Mark McDarra	Thomas McDarra	Mark	1 Oaks Avenue	DEE WHY NSW 2099	02 9982 6133	02 9971 7104			9105 Dee Why
Hones&L	Mr B Hones	Hones & Ledingham	Brian	Suite 101,621 Pacific Highway	ST LEONARDS NSW 2065	02 9439 6755	02 9437 4886			

The **New** button is used to create a new solicitors record. Each record must have a unique **Key** to ensure they can be found easily in the listing book.
The **Copy** button is used to copy the selected solicitors details into a new record thus allowing you to then change the name of the person at the solicitors office without having to enter all the name and address details again.
When finished in this screen, click on **Menu** and you will be returned to the Main Menu or **List** to go to the **List Book**.

Locations

The Location file holds a list of the suburbs, area or buildings that you sell in so the drop down list on the **Location** field can be customized. It can also be used to keep track of project sales with detailed screen handling different financial arrangements for project sales.

To display the **Locations** screen, click on the **Locations** button on the **Main Menu** or the **Locations** buttons in the **List Book Entry** screen



Location	State	Postcode	Map Ref	Project
Croydon	NSW			○ Y ◉ N
Burwood	NSW			○ Y ◉ N
Ashfield	NSW			○ Y ◉ N
Five Dock	NSW			○ Y ◉ N
Quadrant	NSW	2000		◉ Y ○ N
The Meter House	NSW			◉ Y ○ N
Broadwater Breezes	QLD			◉ Y ○ N
Avico	VIC			◉ Y ○ N
Stanmore	NSW	2048		○ Y ◉ N
Southport	QLD	4215		○ Y ◉ N
Fitzroy	VIC	3065		○ Y ◉ N
Waterloo	NSW	1441		○ Y ◉ N
Southdown Apartments	VIC			◉ Y ○ N
East Melbourne	VIC	3002		○ Y ◉ N
Alexandria	NSW	2015		○ Y ◉ N
Rozelle	NSW	2039		○ Y ◉ N
Erskineville	NSW	2043		○ Y ◉ N
Aquavista	NSW			◉ Y ○ N

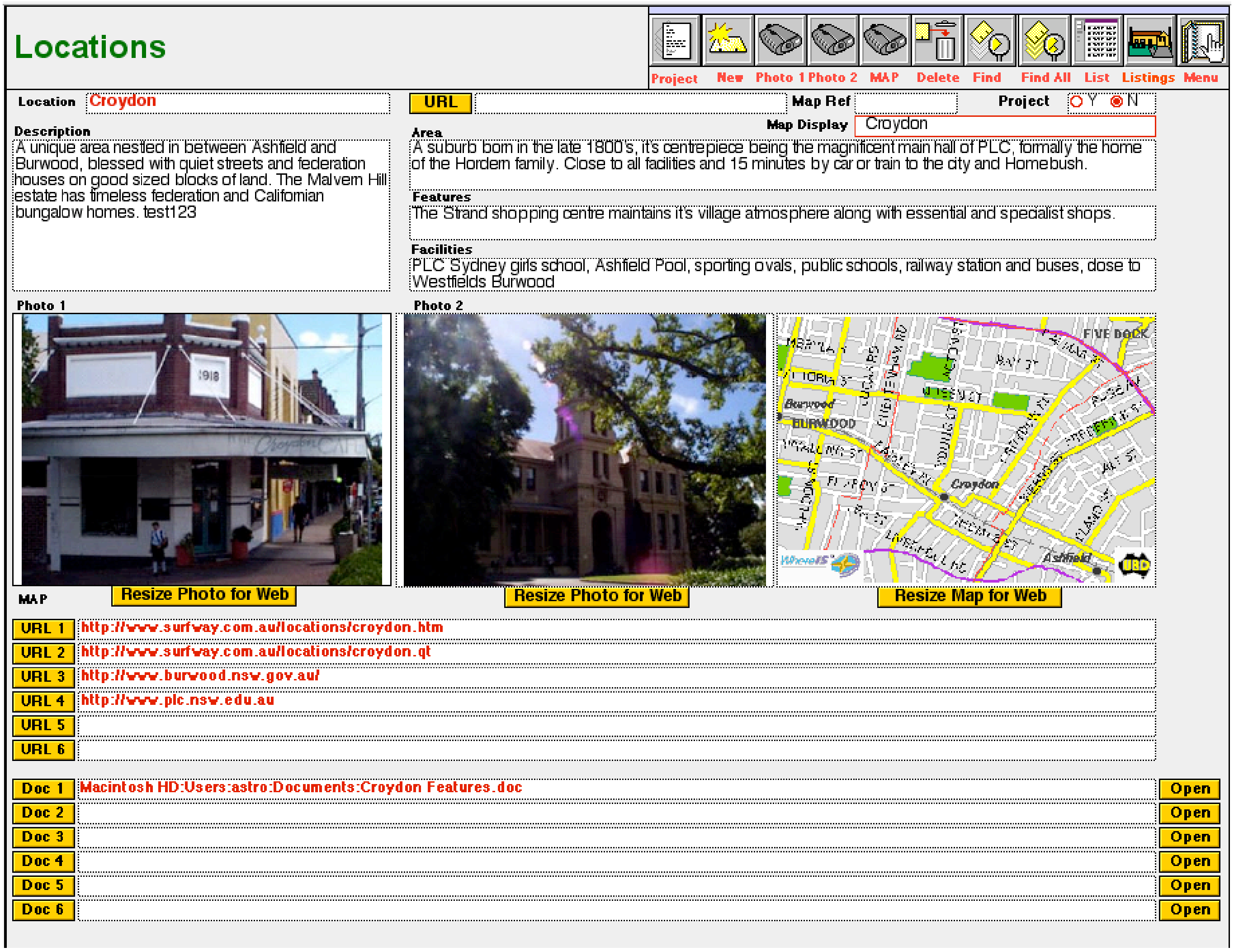
From this screen you can add **New** locations, edit existing locations or delete existing locations. The locations held in this screen make up the drop down list that appears when you tab into the **Locations** field in the Listing Entry screen or CMA Entry screen.

A Location must have the Project Y N button ticked as No for it to appear in the list of available suburbs for listings. Projects must have the Project button ticked as a Yes.

The Locations database can also be published on the Web along with the Webpage database, so summaries of different suburbs, areas or buildings can be available on your web page.
The **Web Update** option is used to upload all details about your suburbs/locations onto your web page so they are available as additional details of the area that a property is in to web browsers.

Additional links to web pages can be attached to each location, as well as links to documents on your computer or network drives.

The [+] button can be used to show the full data entry screen for the Location as follows;



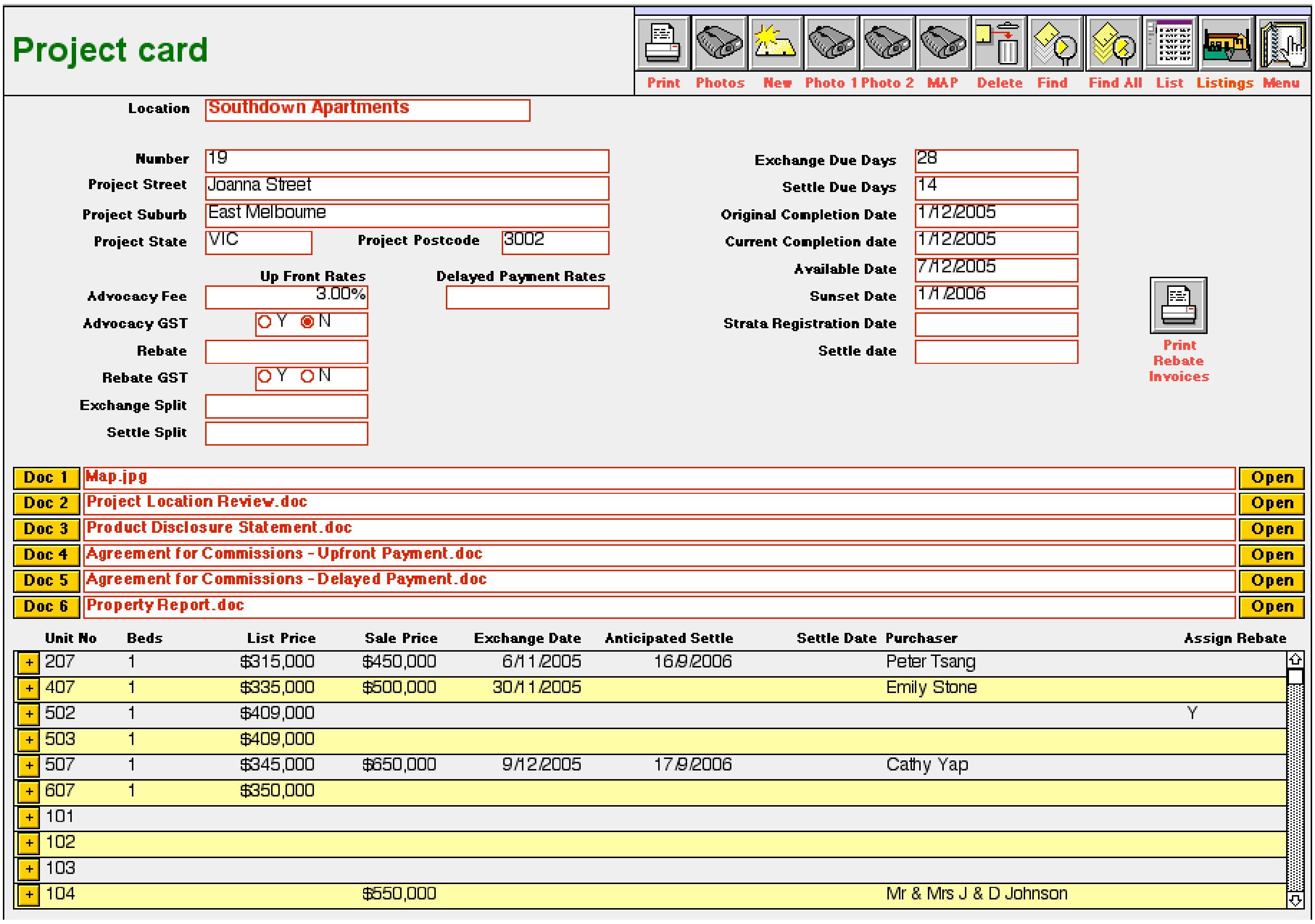
Photos can also be added to this database to be published on the web, by clicking on either of the **Photo** or **Map** buttons. The **URL** can be used to link the location window to further details about the area in a related web site, such as in this instance the locality of Croydon is linked to the PLC Sydney and Burwood Council web page to show details of the suburbs drawcards and features. Likewise another locality may be linked to the local councils website.

Click on one of the [URL 1] links to open the web page link. To get the link in there in the first place, use your browser to open up the web page and then copy the URL from the address bar and paste it into one of the URL fields.

Documents can also be attached to a location. Click on one of the [Doc 1] buttons to prompt you for the location of the document. Navigate your way through your hard drive or network and open the document. The location of the document will be inserted in the field. The [Open] button can then be used to open the documents.

Project Sales

A complete sub system is included in Listpro for the maintaining of listing and selling details for project sales. Due to the delayed nature of project sales, the commission structure is different and separate parameters must be set up to adequately keep track of when commissions are due and what the split between exchange and settlement commissions are.



This screen is displayed when you select a project and click on the Project button at the top of the screen. All of the available units in the project will be displayed on the screen along with details of the commission arrangements and any attached documents.

Once projects have been established in this file, purchasers may be added that have expressed interest in that project and may be matched to suitable units within the development.

Invoices to the developer may be raised from this screen after exchange and settlement of each unit. Separate Project Listings and Sales reports are available in the Listings database Reports screen.

Sales & Prospects

The Sales & Prospects database designed to keep a detailed record of all sales made by the office and all purchasers for and sellers of properties. In addition it may be used as a general mail list for storing all contacts such as builders, developers and the like.

Design

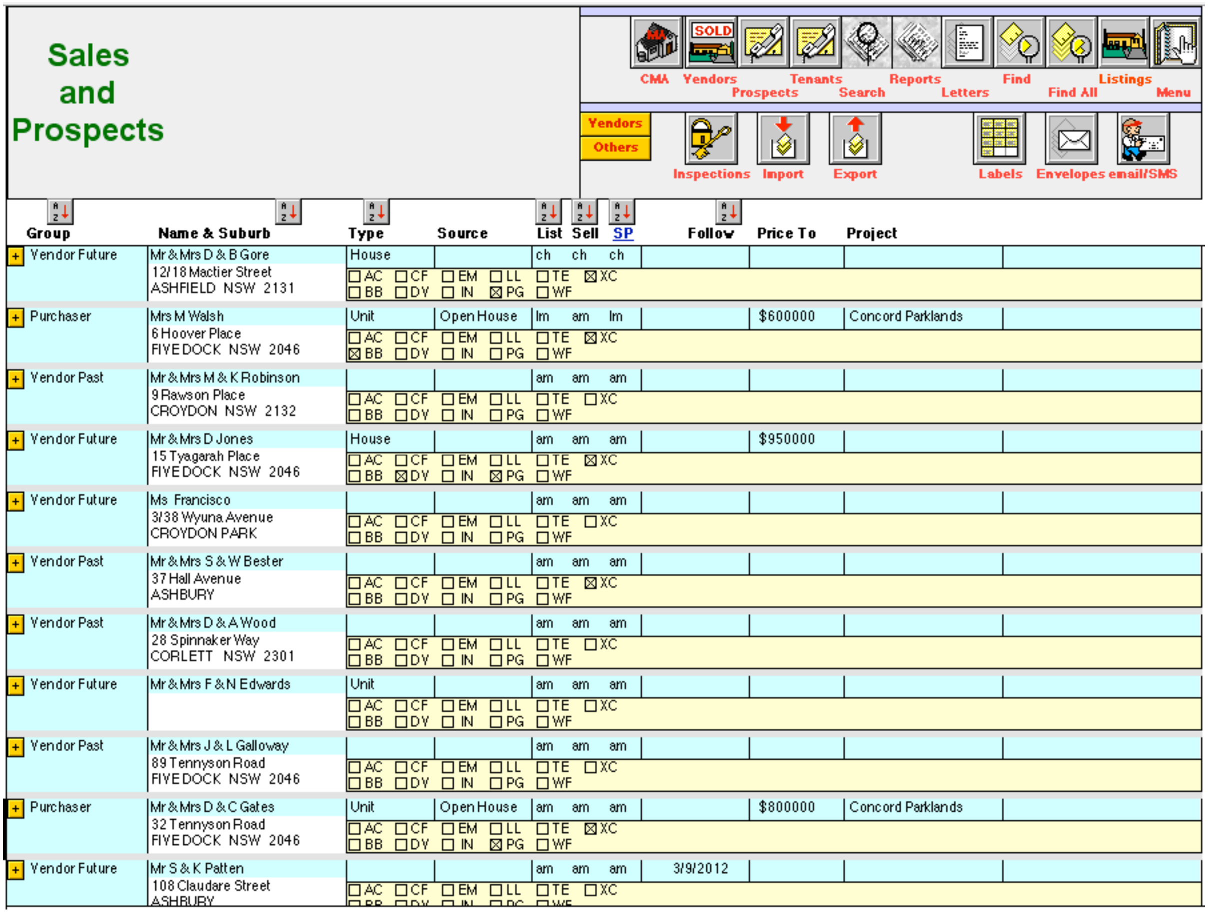
The design of the database allows for any names and addresses to be entered into the database. These names may be categorized into different types of contacts and different information entered for each type. This means that past purchasers of properties may be entered in with details of the property they bought. Current purchasers may be entered in with the details of the property they wish to purchase.

Once you have a database of names and addresses, up to date details of all contacts made with your clients may be kept as well as details of any properties shown. Marketing programs can be allocated to prospects with the aim of automating the follow up and letter writing process to prospects.

A series of standard letters may then be entered into the database to be sent to any grouping of clients at any time.

Main Menu

Whenever you open the Sales & Prospects the following screen is displayed.



Each of the options on this screen may be selected by clicking on button.

CMA	Comparative Market Analysis, this option allows the entry of all sales evidence data both of properties sold and properties for sale. This can be accumulated from your own sales, sales of other agents, your own listings and listings of other agents, in effect you are building up you own database of sales evidence so you don't have to rely on RP Data like information services.
Vendors	Use this option to add Vendors. A vendor is a person you have just sold a property to, so in effect they become future vendors. When this option is selected the Vendor entry screen will be displayed and you make a selection from the available buttons.
Prospects	Use this option to add Purchasers. A purchaser is a person who has made an inquiry regarding the purchase of a property. When this option is selected the Purchaser entry screen will be displayed and you make a selection from the available buttons.
Tenants	This allows the entry of commercial tenants details for matching with available commercial properties. It should not be used for residential tenants,
Search	This option will display the search screen, from where you may enter details relevant to a current listing and produce a list of purchasers that may be interested in that property. A further option is then to print the list.
Reports	This option will display a further menu detailing the reports available in the database. Selections can be made from this list to print out all your clients in different formats and sequences.
Letters	This option is used to display all the available letters that may be sent out. A selection of clients is available on this screen that firstly allows you to determine the list of people to send the letter out to.
Find	Starts a find where a selection of prospect may be found.
Find All	Finds and displays the full list of prospects.
Listings	Opens up the Listing Book menu.
Menu	Opens up the Main menu.
Inspections	This option will display the Inspections screen allowing you enter details of all properties shown to a prospect. This can also be reached by selecting Prospects and then the Inspections tab.

Export This option allows you to export all or part of the mail list out to a new mail list ready for merging with other programs such as word processors or email clients.

Import This option allows you to import a list of clients from any other source such as a text file or another mail list.

Labels This option will print labels for all persons on the mail list or a selection of clients. The label format is designed to suit an A4 sheet in an Apple Laserwriter.

Envelopes This option will print an envelope to a single person or a group of people on the mail list.. The envelope format is designed for the Apple Laserwriter printers.

Email/SMS This option displays the email screen where you can send bulk emails or SMS to prospects.

Vendors Filters the list to show all prospects in the **Vendor** group which includes Withdrawn, Past, Current and Future Vendors.

Others Filters the list to show all other prospects not included in a **Vendor** group.

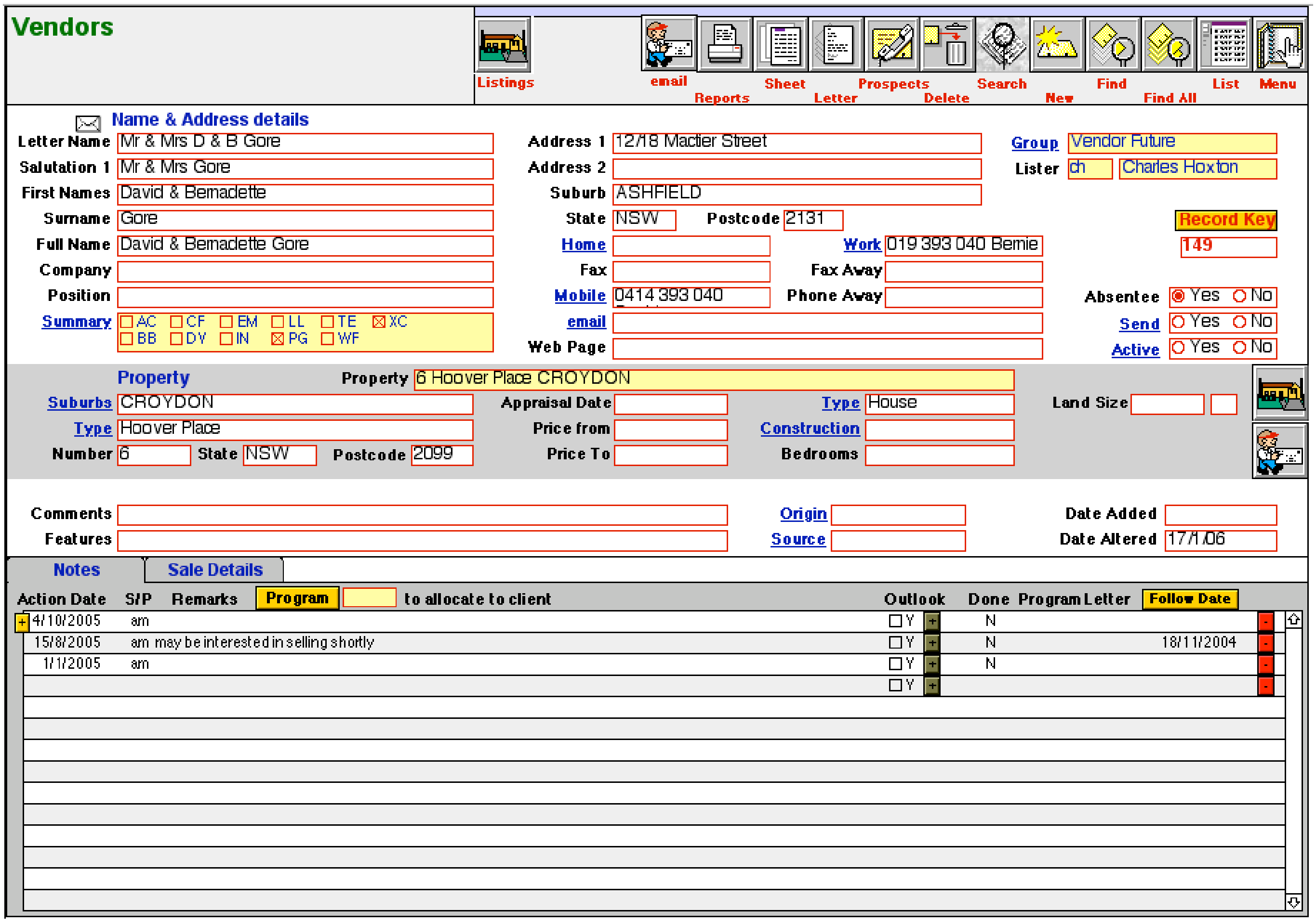
Displays the full detail screen for the selected prospect. If that prospect is in the **Vendor** group then the **Vendors** screen will be displayed otherwise the **Prospects** screen will be displayed.

This button will sort the list by the column selected, either by group or surname, type, Lister, Seller or Follow date.

S/P This label can be clicked on to filter the list to just those prospects that are yours, that is they match the initials of the log on user to Listpro.

Vendors

This screen is used to enter any Vendor details, be they appraisals for potential vendors or the new purchasers one of your sales or the past owner of the property just sold.
Clients who have just purchased a property are considered to be **Future Vendors** while the clients who just sold the property are **Past Vendors**. Both future and past vendors are transferred automatically from the Listings database to the Prospects database using the **Transfer to Sales** option in the Listings database.



Once this screen has been displayed, a panel of buttons is available at the top of the screen. The functions of the buttons are as follows;

Listings A shortcut to the Listings database.

Email A shortcut to the email and SMS screen.

Reports This button takes you to the Reports menu from where a report may be printed out from the selection of available reports.

Sheet This button prints out an activity sheet for the prospect. If there are no activities listed on the screen then no report will be printed..

Letter This button takes you to the Letters menu from where a letter may be printed out to a selection of clients on the mail list.

Prospects This button takes you to the Prospects entry screen which is similar to the Vendors screen except the sales details fields are replaced by purchaser requirement fields

Delete Allows you to delete a **Vendor**. You should not delete any vendors in the **Vendor Future** group as these records form part of the sales register and sales statistics report. Instead if you do not want to mail to them any more, then set the **Send** field to **No** and they can then be excluded from any mail outs

Search This button takes you to the **Search** screen where a selection of prospects may be found or flagged..

New Use this button to start a new blank vendor sheet. Use the **Tab** key to move through the fields and enter data. Tab all the way back to the top so that the buttons come into view again.

Find Use this option to find a vendor already in the computer. You can find a vendor by typing in any information in any field to identify the listing. Typically the Street Name and Number would be all that is required. Press **Return** or click on the **Find** button once the information has been entered. The listing will be found and displayed on the screen. You may then alter that listing by **Tabbing** through the fields and altering any information.

Find All Shows all Vendors on file. Use the ring binder to move through the records.

List This button shows all prospects in the database in a list format.

Menu This button takes you back to the **Menu** screen where all of the other options may be accessed.

<u>Special Use of Fields</u>

Send This field is used to filter a search to eliminate anyone that has the Send flag set to No. This is useful when a client in the database requests that you no longer send information to them but you still want to keep them on the database, or in the case of having multiple copies of a client where that client owns many properties and you only want to send information to one of their records.

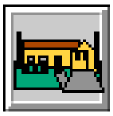
Active Use this flag to keep records off the mail list but still in the database. So if a purchaser who bought a property years ago (now is a Future Vendor) has sold that property and moved on, but you do want to keep the sales record for your sales register report and yearly performance reports, then you will set this field to **No** so that when you are **Search**ing for records to be mailed you can click on the **Active** button and any records that you have found that do not have **Yes** in the **Active** field will be omitted from the search.

Appraisal Date This is used to note down the date and time that a market appraisal has been completed for the potential vendor. This date can then be used to set up a marketing program for the vendor as well as including the record in searches and reports.

Default Salesperson Each record in the database can have a listing salesperson and a selling salesperson. The **Default** salesperson is then set at either the selling salesperson for **Vendor Future** groups or the listing salesperson for all other records. This determines who gets their name on the bottom of letters and who the follow up activities are assigned to. This field is on the Sales Details tab.

Origin This comes from the Listbook when sales are transferred or can be entered manually. It is used to keep the suburb of origin of the purchaser of the property and when transferred from the ListBook is the purchasers suburb field. A report may be printed detailing all suburbs that your purchasers originated from.

Source Like the Origin field except this is used to describe what marketing source the Vendor came from, such as advert, open house, signboard etc.



This button is used to convert a Market Appraisal into a Listing

<u>**Using the Vendors Screen**</u>

Vendor Future - Purchasers of your listings

There are two main uses for this screen. Firstly it is to review or change any sales details that have been transferred across from the ListBook automatically. All of the Purchasers details will have been transferred into the Vendors name and address fields at the top of the screen while all of the sales details will have been transferred to the Sales fields on the screen. Any other details may be added or altered to this screen at this point. The address of the vendor will either be the property address of the listing if the **Absent** flag is **No** or the Purchasers existing address if the **Absent** flag is **Yes**. For these vendors the default salesperson is the salesperson who sold them the property (the **Seller** salesperson).

Many salespersons refer to future vendors as <u>past purchasers</u> however this system refers to them as Vendor Future so they can be included in all reports relating to owners of properties.

Vendor Past - Vendors of your listings

When the sales are transferred across the vendors of the property are also transferred across with their current address as listed in the ListBook. Therefore before transferring the sales across you should attempt to find out the forwarding address of the vendor and enter it in the ListBook first. These vendors will all be transferred over under the **Vendor Past** group.

It may not be applicable to keep many of the past vendors details on file, particularly if it is estate matters or the vendors have moved out of the area or overseas. Different have agents have conflicting ideas on whether to keep all past vendors or to screen them once transferred and only keep those that may be of marketing value in the future.

Vendor Appraisal - Market Appraisals

This group of vendors are manually entered in after a market appraisal has been done for the vendor. They are considered as current not because they have listed with you, (they would be in the ListBook in this case), but because they are currently considering selling their property so they are current vendors.

In these cases the details entered should be all about the property they have to sell and make sure the M/A Date and Time has been entered if an appraisal has been done. This date is crucial if a marketing program is to be allocated to the current vendor as the program will be started at a certain date after the appraisal has been done.

Programs, Letters and Follow Ups

A **Marketing Program** may be allocated to a Vendor//Prospect that automates the activities that follow. See the section on **Programs** for a full description of how to set up the **Program**.

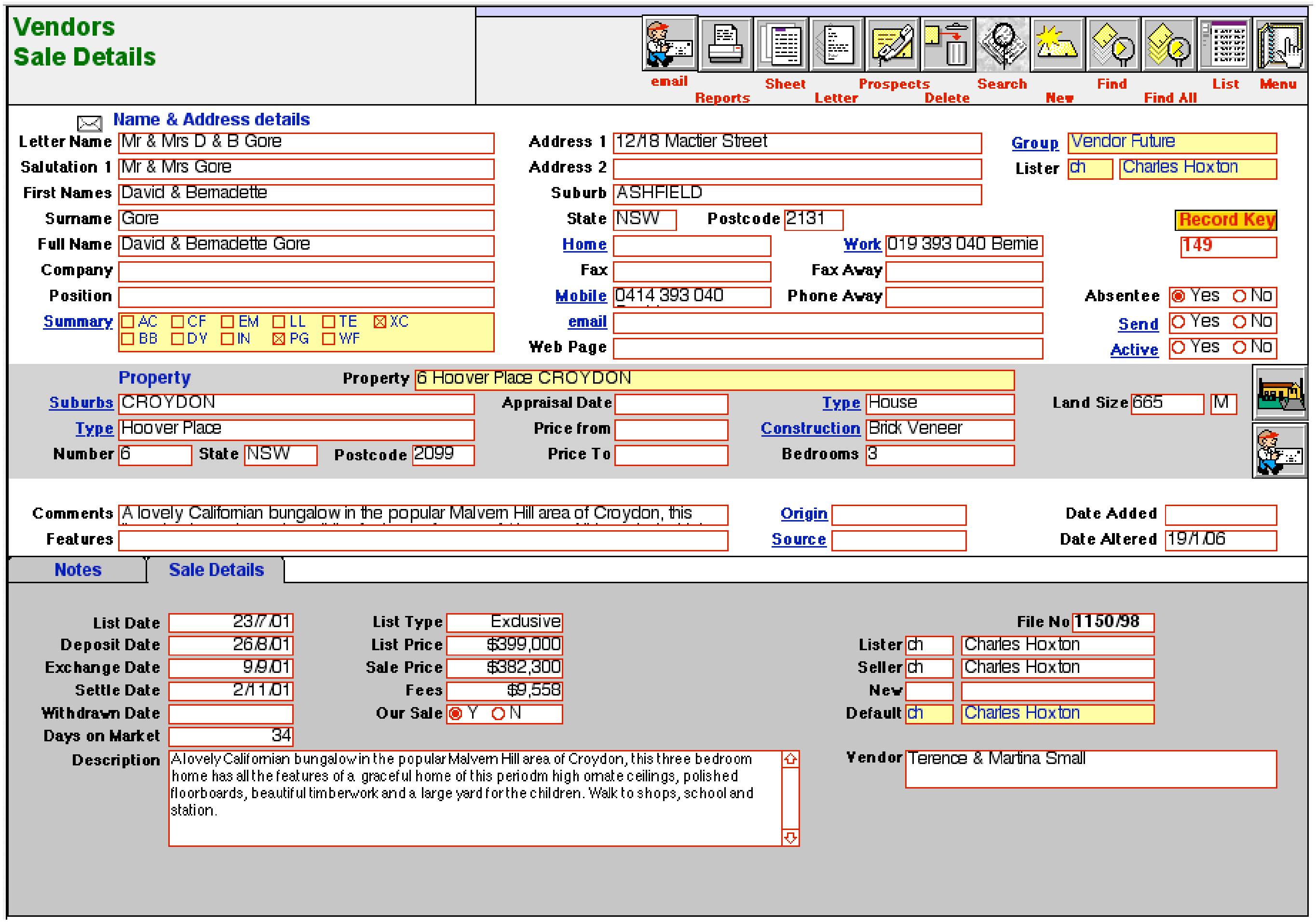
To allocated a program to a Vendor click in the box next to Program and select a program from the list that pops up. Once you have selected the program, click on the Program button and you will be prompted to allocate the program to the Vendor. This will add any number of activities that have been set up for the program to the activity sheet for the vendor. This can include reminder notes as well as letters to be printed.

Aside from allocating a Program to a Vendor, you can also enter any note regarding the vendor and attach a follow date to that note so the activity will appear on a diary and follow up report.

Note that any record with the word **Vendor** in the group e.g. Vendor Past, Vendor Future etc, will default to this screen when the + button is selected at the List screen. They will also be selected when the Vendors button is pressed on the List screen and all records from other groups will be excluded from the list.

Sales Details

This screen is part of the Vendors screen and is reached by clicking on the **Sales Details** tab.

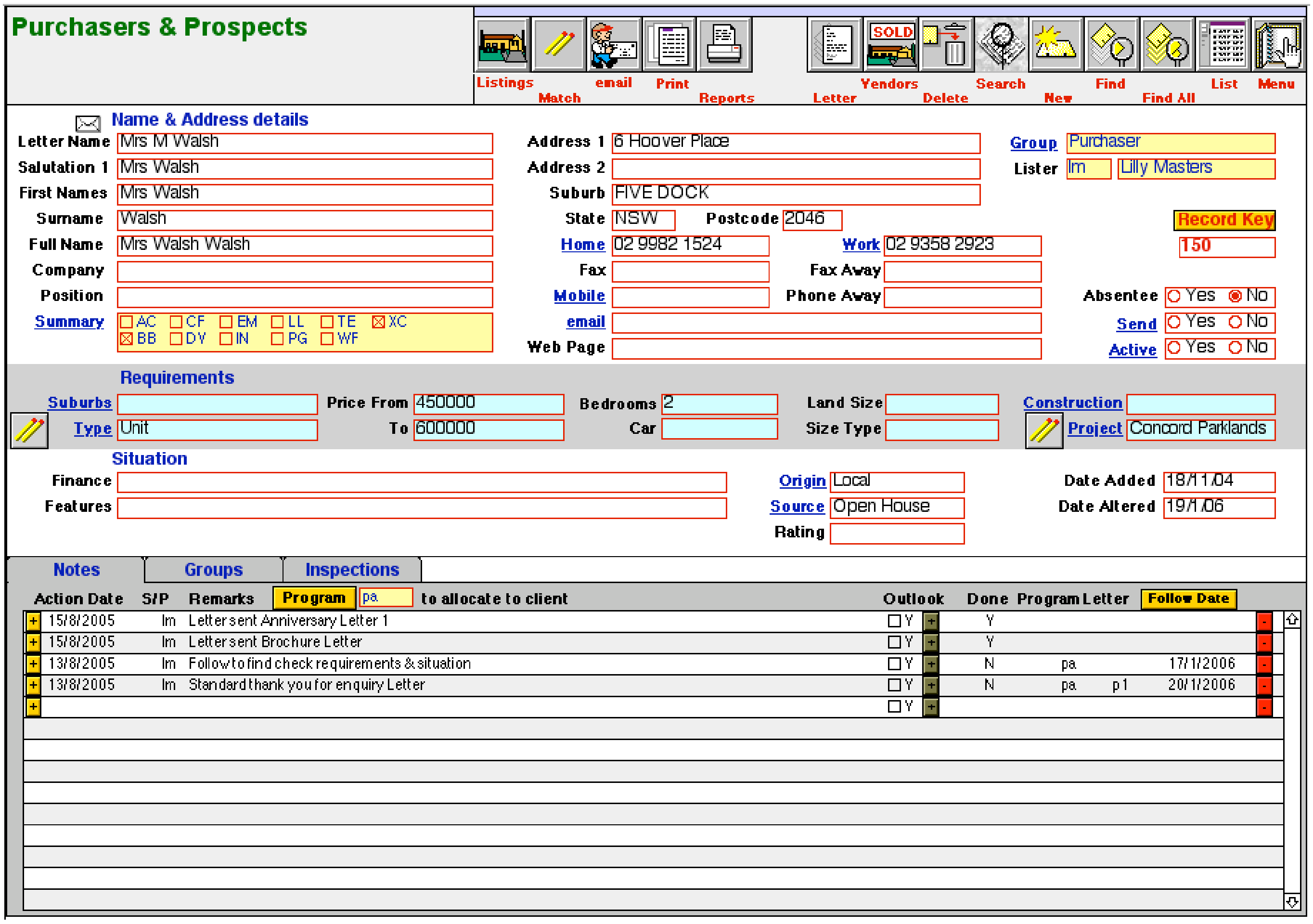


All of the details on this screen will be transferred from the Listing Sheet and Sales Advice once a property has settled. Always make sure that the forwarding address of the past owner of the property has been changed before transferring the property over. This will save the embarrassment of sending mail out to the property addressed to the old owner.

You can also use this screen to go back and add in historical sales records from before Listpro was installed so as to start sending out anniversary cards and letters.

Prospects

The **Prospects** screen allows a prospect record to be added, edited or deleted. Details of contacts made with those prospects may also be entered. These contact details are the same as those available on the Contacts screen.



Buttons

The buttons on this screen operate the same as those on the Vendors screen except for the following;

Match This button will take the requirements of the currently displayed purchaser and search the Listings database for matching properties.

Print This will print a Prospect Sheet with all the details of the Purchaser, their requirements, contacts and properties shown. A blank one can also be printed out to use as a data entry sheet by selecting the Blank Record option from the print dialog box.

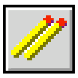
Vendors This button takes you to the Vendors entry screen which is similar to the Prospects screen except the purchaser requirement and situation fields are replaced by the sales details fields.

Find Use this option to find a prospect already in the computer. You can find a prospect by typing in any information in any field to identify the listing. Typically the Street Name and Number would be all that is required. Press **Return** or click on the **Find** button once the information has been entered. The listing will be found and displayed on the screen. You may then alter that listing by **Tabbing** through the fields and altering any information.

Find All Shows all Prospect (non vendors) on file. Use the ring binder to move through the records.

Fields

Requirements These fields can be filled in to detail the requirements of a purchaser. The fields **Type**, **From To price**, **Bedrooms** and **Location** are then used to match properties with the buyer. The **Location** field should only be used if the purchaser wants a specific suburb, otherwise it may corrupt the matching of properties by incorrect spelling of suburbs or inclusion of suburbs that you have no listings in.



Once requirements have been added you can use the **Match** button to search your listings for suitable properties. The **Search** screen from the List Book will be displayed with a list of matching properties. You have to be careful to not define a purchasers requirements too much so that properties just outside the requirements are not displayed. It is usually best to enter only a **To Price** that is marginally above the requirements of the purchaser so the search is just on properties that are below the **To Price** rather than being in a range. **Type** is important so only houses or units are searched for. There are two of these match buttons, the one on the left will match on price, type and bedrooms while the one on the right will match on Projects as well.

Origin Use this field to record where your enquiries are coming from (by Suburb). A report may be printed detailing all suburbs that your purchasers originated from thus allowing you to target your advertising. The **Source** field is also used for this purpose to record how the purchaser heard about you (e.g., paper, open house, walk in, mail out etc).

Using the Prospects Screen

Purchasers for your listings

The main use of this screen is to add details of potential purchasers of your listings, investors, developers, high wealth individuals, VIP customers and other miscellaneous contacts such as solicitors, other agents and other professional people that you may wish to mail to now or in the future. In effect this screen allows the entry of a large mail list of people for mailing purposes.
Each of the persons added can be grouped using the **Group** field, so that potential purchasers are entered in group **Purchasers** for instance.

At the bottom of the prospects screen are details of all the contacts that you have made with the prospect. The real success of a database like this is the accurate and constant updating of the database. The more information you type into the database, the more it can help you follow up those prospects.

Programs, Letters and Follow Ups

A **Marketing Program** may be allocated to a Vendor//Prospect that automates the activities that follow. See the section on **Programs** for a full description of how to set up the **Program**.

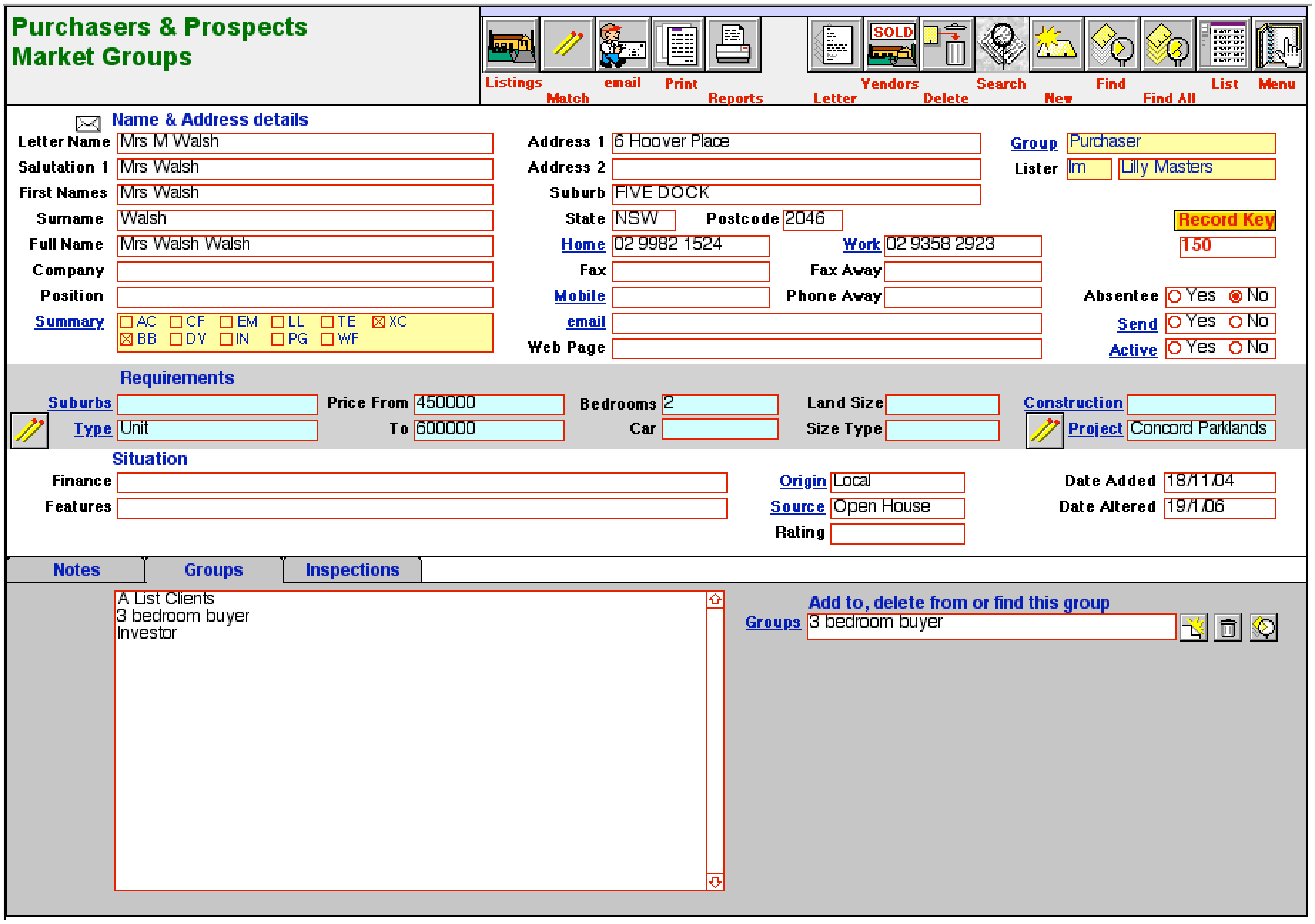
To allocated a program to a Vendor click in the box next to **Program** and select a program from the list that pops up. Once you have selected the program, click on the **Program** button and you will be prompted to allocate the program to the Vendor. This will add any number of activities that have been set up for the program to the activity sheet for the vendor. This can include reminder notes as well as letters to be printed.

Aside from allocating a Program to a Vendor, you can also enter any note regarding the vendor and attach a follow date to that note so the activity will appear on a diary and follow up report.

Note that any record with the word **Vendor** in the group e.g. Vendor Past, Vendor Future etc, will default to this screen when the + button is selected at the List screen. They will also be selected when the **Vendors** button is pressed on the List screen and all records from other groups will be excluded from the list.

Groups

This screens is reached by clicking on the **Groups** tab on the purchasers screen.



It is used to add the purchaser into different market groups so you can target them later on for specific mailings and searches.

Buttons

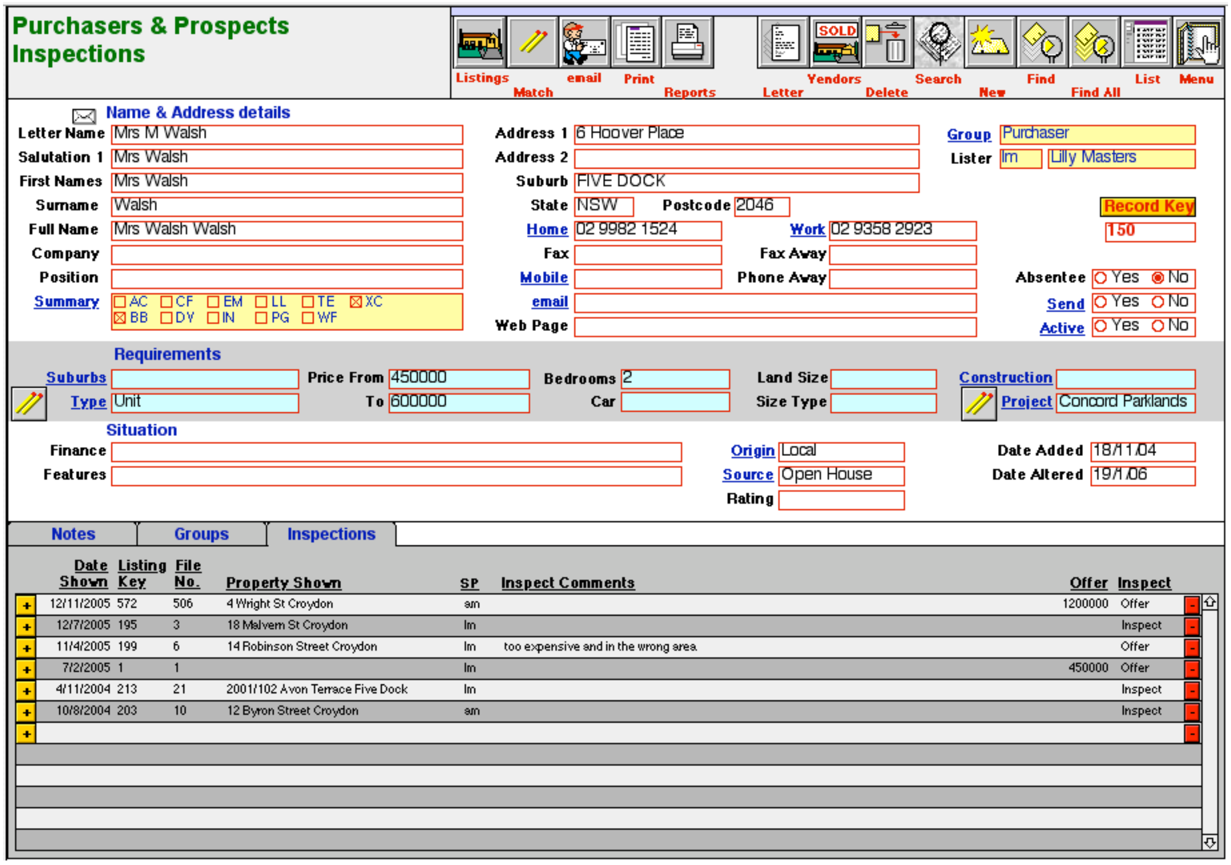
Use this button to add a group to the Purchaser record. First select the group from the drop down list and then click on this button to add that group.

Use this button to remove a group from the purchaser. First select the group you want to remove from the drop down list and then click on this button. Alternatively you can just drag through the group in the display box and delete it.

Use this button to search for all prospects in that group. First select the group from the drop down list and then click on this button to find all matching prospects. You can then look at the records found in the List view.

Inspections

The Inspections screen is used to enter details of all properties shown to a Prospect. When first selecting this screen you should **Find** the Prospect you wish to update first, then add the details of the properties shown. The list of properties shown may be cross referenced against the Listing Book file to automatically bring across the address of the property.



When entering the details of properties shown, the address of the property may be automatically transferred from the Listing Book by clicking on the **Listing Key** field. A drop down list of all properties in the List Book will be displayed. Scroll up and down the list and click on the property that was inspected and all of the details will be brought across. Then enter the

comments from the prospect and the date of the inspection. Inspections can also be entered through the List Book, however you must know the **Record Key** of the prospect to establish the link. The list of records in the Prospects database may grow to thousands so a drop down list is impractical, but the list of property listings will never exceed a couple of hundred so a drop down list is more applicable to select the property from in this screen.
Other options on this screen include;

Find Use this option to find a prospect or vendor already in the database. You can find a vendor by typing in any information in any field to identify the listing. Typically the Street Name and Number would be all that is required. Press **Return** or click on the **Find** button once the information has been entered.
You can also enter a property address in the Inspection list to find all prospects who have inspected that property. This is useful when you have sold the property and want to send a letter to all those prospects informing them of the sale and inviting them to view your other listings, or if the property is coming up to auction and you want to invite them to the auction.

+ This button is used to take you to the Inspections screen for the Listing that will show you all of the prospects that have inspected that property.

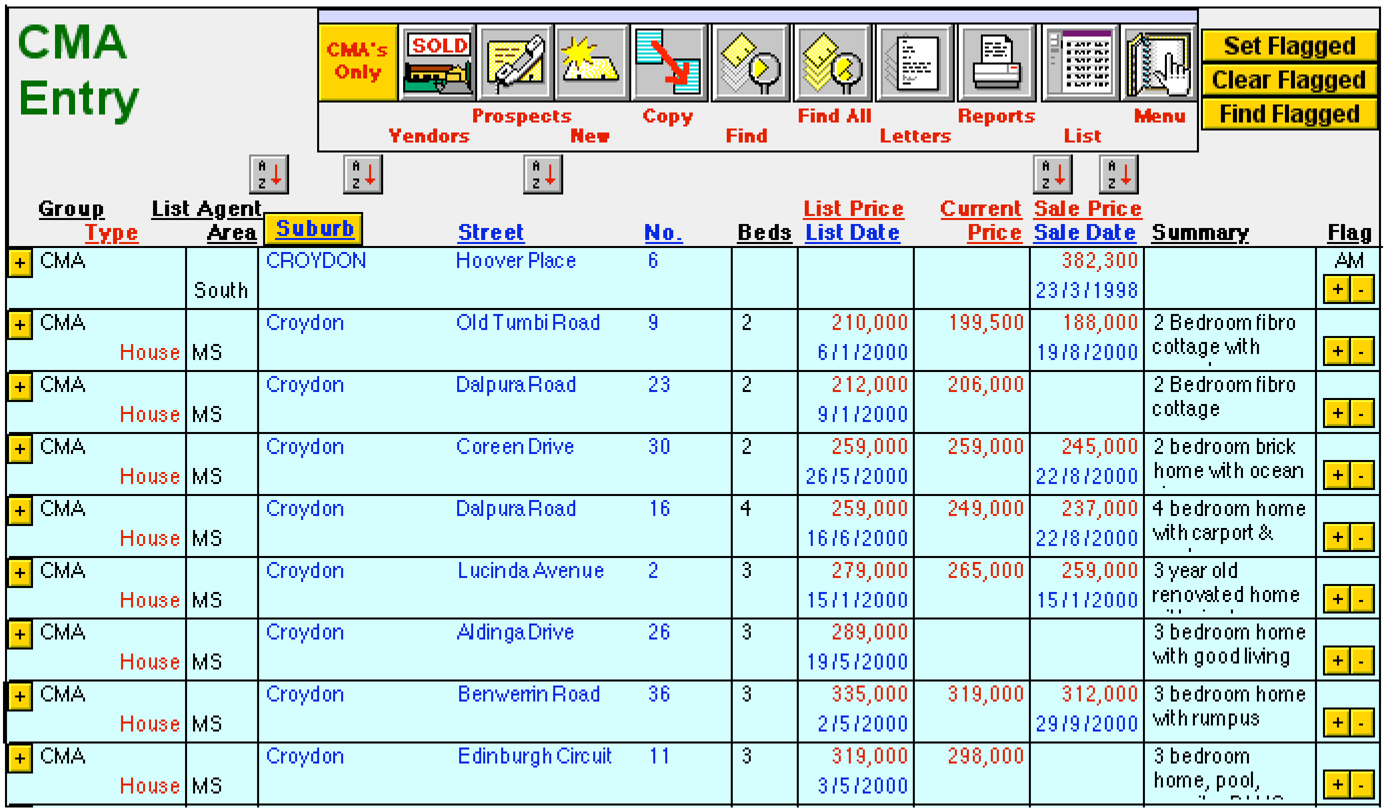
Fields

Offer Any offers on the property need to be recorded in this field in which case you would change the Inspect field to be an Offer. All offers are added into the Statistics report so make sure the Inspect field is changed to offer.

Inspect Use this field to note the type of Inspection, whether it was an Open House or a drive by or an office introduction or an offer made. Various values in this field are used for the Statistics reports so they should accurately reflect what type of inspection or activity occurred.

CMA (Comparative Market Analysis)

The **CMA** screen allows the entry of sale evidence data , both properties sold and properties for sale. Typically data for CMA's can be sourced by sign audits in your area or by looking through newspapers and the internet. The main purpose of a CMA report is to be able to present to the potential vendor a list of all properties currently on the market that are comparable (current competition) plus a list of all recent sales of comparable properties. Details of sales made will come from your own sales by searching for Vendor Future records or from sales records accessible over the internet or on line sources.



Group Type	List Agent Area	Suburb	Street	No.	Beds	List Price List Date	Current Price	Sale Price Sale Date	Summary	Flag
CMA	South	CROYDON	Hoover Place	6				382,300 23/3/1998		AM
CMA House	MS	Croydon	Old Tumbi Road	9	2	210,000 6/1/2000	199,500	188,000 19/8/2000	2 Bedroom fibro cottage with	
CMA House	MS	Croydon	Dalpura Road	23	2	212,000 9/1/2000	206,000		2 Bedroom fibro cottage	
CMA House	MS	Croydon	Coreen Drive	30	2	259,000 26/5/2000	259,000	245,000 22/8/2000	2 bedroom brick home with ocean	
CMA House	MS	Croydon	Dalpura Road	16	4	259,000 16/6/2000	249,000	237,000 22/8/2000	4 bedroom home with carport &	
CMA House	MS	Croydon	Lucinda Avenue	2	3	279,000 15/1/2000	265,000	259,000 15/1/2000	3 year old renovated home	
CMA House	MS	Croydon	Aldinga Drive	26	3	289,000 19/5/2000			3 bedroom home with good living	
CMA House	MS	Croydon	Benwerrin Road	36	3	335,000 2/5/2000	319,000	312,000 29/9/2000	3 bedroom home with rumpus	
CMA House	MS	Croydon	Edinburgh Circuit	11	3	319,000 3/5/2000	298,000		3 bedroom home, pool,	

To add records to the list select the **New** button, the record will be created with CMA as the group and will have the suburb and street copied from the previous selected record so you can enter a whole street at a time if you have the details.

Properties that are on the market should have the List Price, List Date and Current Price entered, while properties that have been sold should have the Sale Price and Sale Date entered. Keep in mind that when entering properties that have been sold, you do not need to enter your own sales as these can be transferred across from your Listings once they have been sold using the **Transfer to Prospects** option and do not have to be entered also in this screen. They will come up under the group **Vendor Future** and not the **CMA** group so if you are doing a search for all recent sales in an area you search for not only the CMA group but also the Vendor Future group. You can do this by a multiple search (using the **Copy** button).

The **List Agent** and **Area** fields may be used to allocate the records to a particular agent or area if you divide your market area up into different regions for different salespersons.

Searching Techniques

The **CMA's Only** button will display all records in the CMA group only, clearing any vendors and purchasers from the screen.

When you want to produce a CMA report it should be done in two steps, first all properties currently on the market should be found and then the **CMA For Sale** report printed, then all properties that have been sold should be found and the **CMA Sold** report printed. The same search criteria should be used for both searches, but the price range should be entered in the Current Price field for the **For Sale** search and then entered in the **Sale Price** field for the **Sale** search.

Finding Properties For Sale

The **Find** button is used to start a search and will automatically enter CMA in the **Group** field so that only CMA's will be found. Then you should tab to the Suburb filed and enter the suburb you want to search in (you may leave it blank to include all suburbs), then tab to Current price and enter a range of prices (enter the from price then three ... and then the to price e.g. 200000...300000). Before pressing Enter/return to start the search, you can also enter a range of dates to get more recent listings e.g. >1/1/2000 or 1/1/2000...31/12/2000 in the Date Listed field, you may also enter a particular region or List Agent as well, you can also copy the search by clicking on the **Copy** button and then change the Suburb for instance so you can search on the first line for all CMA's in Croydon currently on the market between $200,000 and $300,000 and then click copy and change the suburb to Burwood on the next line, this will then find all properties in both Croydon and Burwood currently for sale between $200,000 and $300,000. Once the search has found the list of properties you can either print the complete list out, or further refine the search using the 

buttons to flag selected properties for inclusion (see Flagging Properties for further details). Either way once you have a list selected, click on the **Reports** button and then the **CMA For Sale** button to print the report.

Finding Properties Sold

The second stage of producing a CMA report is to find all properties that have been sold. Start by clicking on **Find** and then entering a suburb and price range, this time typing the price range in the **Sale Price** and any Date range in the **Sale Date** field. Once this has been done, you should then click on the **Copy** button to create a new search line and then change the group from **CMA** to **Vendor Future** to find all sales that your agency has made. Then press Enter/return to find the properties, use the flag option if required, then click on **Reports** followed by **CMA Sold** to print the list of sales.

Flagging Properties

This option can be used if your initial search finds too many properties and you want to reduce the list down to a selected number. Start by clicking on the 

button to clear any previous selection, this should be done **prior** to commencing any search. Then do your normal find as detailed above. Either of two options may then be taken, firstly if you want to include most of the records, start by clicking on the 

to set the flag for all of the displayed records. Then click on the 

button to exclude any records not required. Secondly if you want to only select a small number of the records displayed, just click on the 

button to flag those records only.

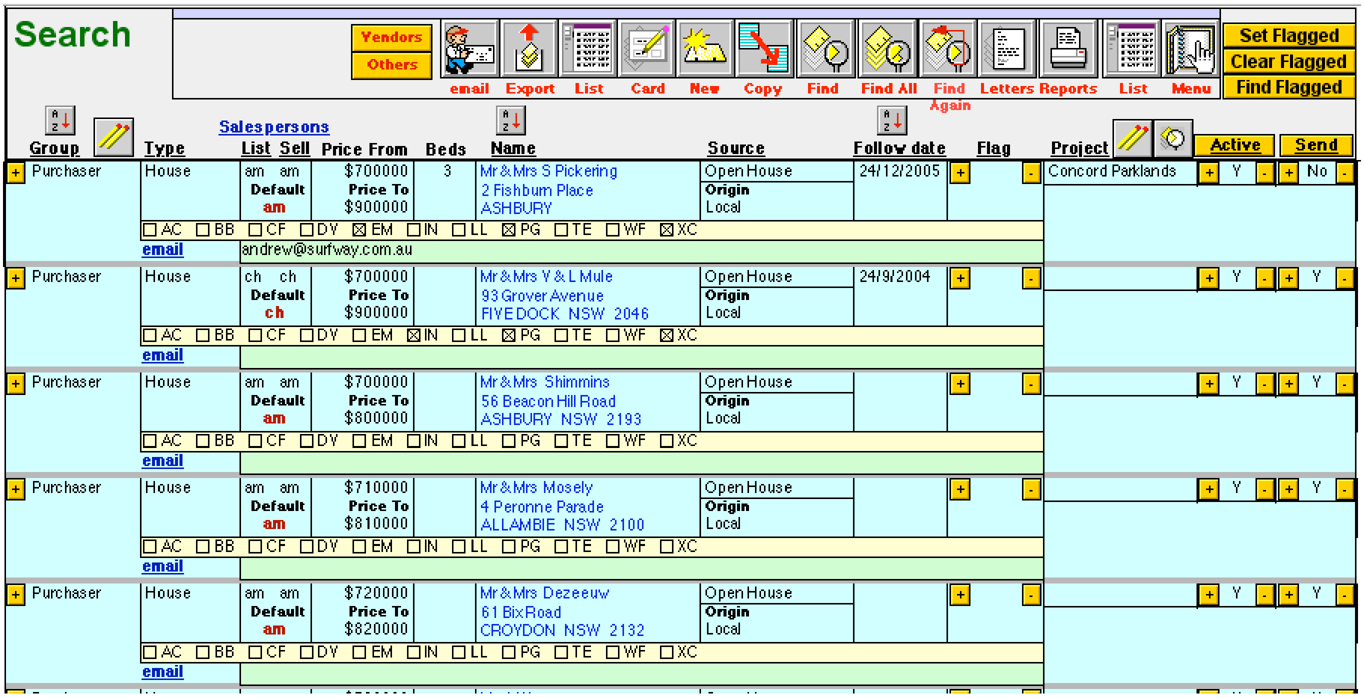
When you have made your selection, click on the 

button to select just those flagged properties. Then you can print the report. This technique can be used for either of the For Sale or Sold options.

Searching

The Search screen is used to find or search for a single prospect or a list of prospects that you wish to work with or print a list of or send letters, labels and envelopes to. You can also use this screen to flag and group prospects for marketing purposes.
When the Match option is used in the Listings database, the resulting purchasers found will be displayed on this search screen. This list may then be expanded or refined using the techniques described below.

The screen is displayed as follows;



Use the **Find** button to start the find process and then enter information into any of the fields that you wish to search on. A search can take place using multiple fields and multiple requests. Refer to the section on **Using Filemaker** to find out further information and tips on searching.

There are a number of fields that are important in the searching process. They are;

Summary This field is both flexible and powerful for grouping prospects. There are no set values for this field so you can define your own summary values. The first principal in using the summary field is to define a list of values to apply to prospects. A simply example is XC for Xmas Card or NL for newsletter or VIP for a VIP client. All three of these values can be in the Summary field or just one. As long as there is one space between the values then you will be able to search for any combination of values in this field. Another idea is to set up number codes so a 01 is a private buyer, 02 Investor, 03 Developer, 04 Professional, then 10 for interest in Units, 11 Houses, 12 Shops, 13 Factories. Then the Summary field for a developer interested in Units would be **03 10**. If they were also interested in Shops then they would be **03 10 12**. Then you can search for prospects interested in Shops by finding all with **12** in the summary field, or all developers by finding on **03**. Combinations and multiple find selections make this field one of the most powerful search features in the database if used in an organized manner.

Active This is a **Yes/No** field used to define whether the prospect is still active. An active prospect is essentially one that still resides at the same address. Once a prospect who has purchased a property off you (Vendor Future) moves on to another property then you can add them as a new record in that new property and then set the **Active** field to **No** for the old property. That way they are still held on file so your Sales Register and Monthly and Yearly Statistics reports are still complete, but they can be easily excluded from any mailings you do. After searching and finding a list of prospects, click on the **Active** to exclude all prospects without a **Yes** in this field. The **Y** or **N** can also be used instead of the full **Yes** and **No**.

Send This field is similar in use to the **Active** field to eliminate prospects who do not wish to have marketing materials mailed to them regularly. They are still Active in that they still live or own the same property but they object to mailouts. Again do the Find first then click on **Active** first to eliminate them first then **Send** to eliminate those prospects without a **Y** or **Yes** in the Send field.

Salespersons The listing and selling salesperson can also be used for the search so a Find can be narrowed down to those prospects that belong to a nominated salesperson. This can be combined with any other field so you can find all Developers that belong to Salesperson AP for instance.

Flag This field is used for temporary flagging of prospects for inclusion in a mail out. So you may do a find that selects a couple of hundred prospects which you then want to narrow down to handful for a mail out. Scroll down the list and click on the **+** button to set the flag to the Current Salesperson or **-** to remove the flag. Once you have selected the handful of records, click on the **Find Flagged** button to show only those flagged records. Before starting another mail out, make sure you click on the **Clear Flagged** button to remove all of the previously set Flags. If the Find that you start with gets the right list to start with then use the **Set Flagged** button to set the Flag for all of the records, then you can use the **-** button to remove some of the records you may not need, followed by the **Find Flagged** button to show only those selected records.

The standard buttons are available at the top of the screen to start options or move to other screens.

Sample Searches

Purchaser Search

The purchaser search is the most common use for this screen. Every time you list a property the Match option should be selected from the Listings screen. All purchasers that match the property type (House unit etc) and the price range of the property will be found and listed on the search screen. The **Find Again** button can then be used to refine this search to a broader or narrower range.
Alternatively you could start a new search for purchasers on this screen by selecting the **Find** option. Select Purchaser from the Group field and then the property type from the Type field, then in the Price To field enter a price range such as 800,000…900,000. Press enter to complete the search.
You may add in extra search fields as well such as a bedroom search like >2.

Salesperson Search

After any search has been completed the **Salespersons** word can be clicked on above the List and Sell column which will filter any search down to just those prospects that you are the lister of (the log on salesperson). If this filter does not work properly for you then check what initials have been entered in the Application Preferences screen.

Email Search

Like the salesperson search the **email** word can be clicked on to filter a search down to just those prospects that have email addresses. This is used when you have found a list of prospects and then want to email just those prospects with email addresses.

Mail out Search

The Summary field in yellow containing various checkboxes is the best way of identifying prospects for continual mail outs such as monthly newsletters or property guides. The PG box is used for Property Guide so any prospect you want to send this to should have this box ticked. Likewise for XC for Xmas cards. The definition of these boxes can be altered to suit so PG and XC may no longer be in your database.

Inactive Records

Always make sure you use the Active and Send filters once a list of prospects has been found. This will make sure that prospects who do not want to be mailed or no longer live at the property address are not mailed or emailed.

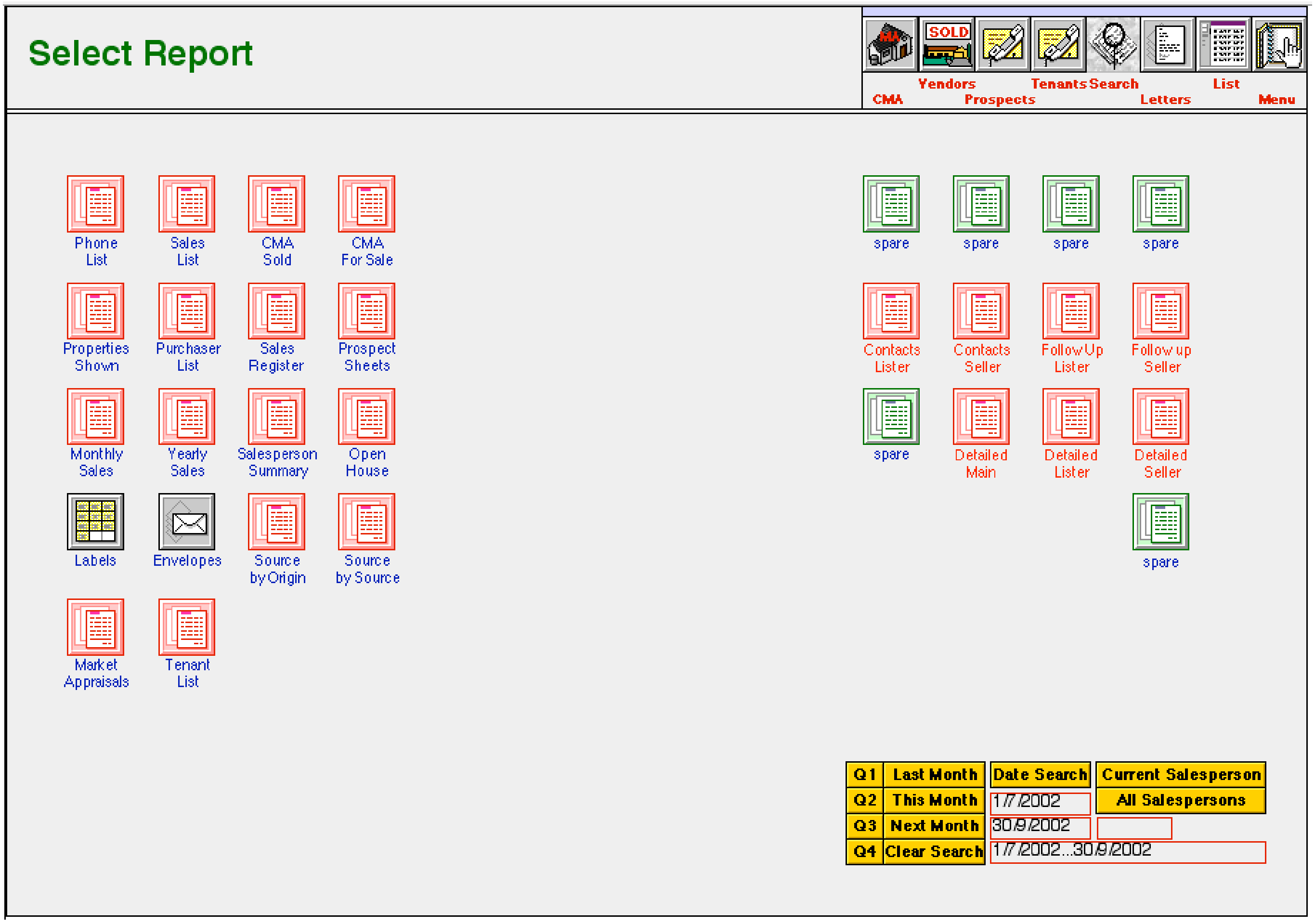
Multiple Searches

The **New** or **Copy** buttons can be used to generate multiple line searches. You can start your search on the first line and then either copy that search to the next line, alter one or two fields and then complete the search. This makes the search screen very powerful and capable of some very specific searches. The use of the **Omit** box in the left margin combined with searches allows you to exclude certain prospects from the list as well.

Reports

The Reports screen lists all of the available reports in the database. Some of the reports listed here are also available by clicking on the Print button in the relevant screen i.e. when entering information into the Properties Shown screen, click on List to print the Properties Shown List.

The screen is displayed as follows;



The buttons available on this screen are as follows;

CMA This will take you to the CMA screen

Vendors This will take you to the Vendors screen.

Prospects This will take you to the Prospects screen.

Tenants This will take you to the Tenants screen.

Search This will take you to the search screen. In general you would normally do a search for a specific list of prospects prior to printing out any of the reports.

Letters This button takes you to the Letters menu from where a letter may be printed out to a selection of clients on the mail list.

List This will take you back to the Prospects List screen.

Menu This button takes you back to the **Menu** screen where all of the other options may be accessed.

A selection of prospects to be included in some of these reports may be made in the Search screen. Three fields are used from the search screen, Group, Main Salesperson and Active for selection of prospects to be included in the reports. The reports that use these search fields are denoted by an *. Other reports have predefined searches (e.g. Sales Register, Salespersons Summary) which select all sales made.

The Reports that are available are described below;

Phone List A list of all selected persons in the database sorted by Surname showing all phone numbers and email address.

Sales List A list of all properties with Sale Prices and in Group Vendor Future with vendors and sales details sorted by Settle Date.

CMA Sold This report should be combined with a search conducted in the CMA screen for a selection of comparable properties that have been recently sold. This should draw from Vendor Futures and CMA groups.

CMA For Sale This report should be combined with a search conducted in the CMA screen for a selection of comparable properties that are on the market in opposition to your clients property.

Properties Shown A list of all prospects that have been shown properties and the properties they have been shown.

Purchasers List A list of all prospects grouped as Purchasers and their property requirements. This report should be printed after you have done a Purchaser search or Match in the search screen. So each time a new listing is entered, click on the Match button to find all purchasers that match that listings and then print this report out. A new page will be started for each salesperson so the report can be given to each salesperson to follow up their buyers.

Sales Register A detailed report of all sales made (group Vendor Future) with vendors details.

Prospect Sheet The prospect sheet report for individual prospects.

Monthly Sales Summary A summary of total sales made and commissions earned month by month.

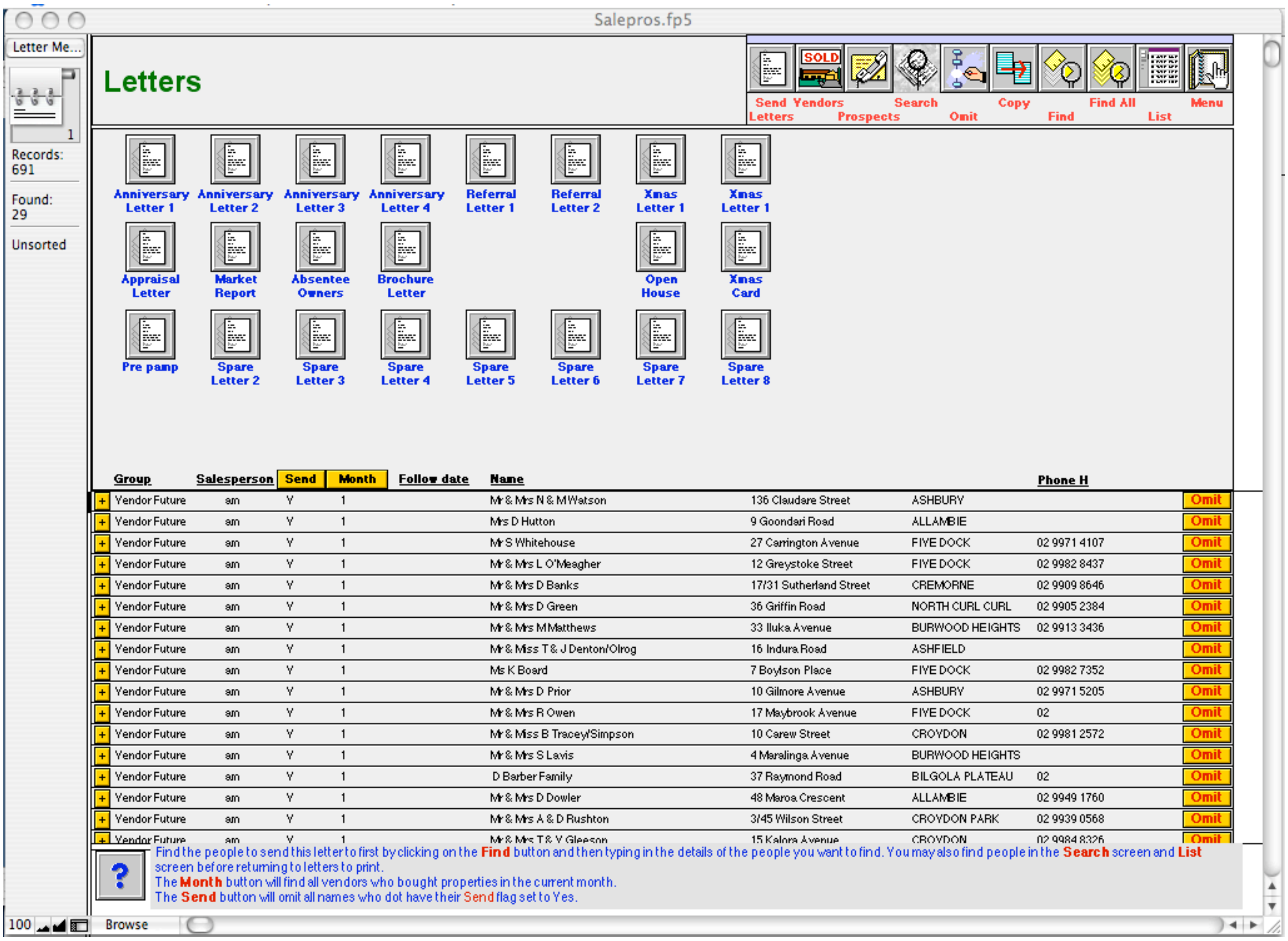
Yearly Sales Summary	As for the Monthly Summary, but with yearly totals only.
Salesperson Summary	A summary of all sales by salespersons by month and year.
Open House	This reports prints out blank Open House entry sheets to take to Opens.
Labels	Labels to all selected persons in the database (A4 16 per page, 2 x 8)
Envelopes	Envelopes to selected persons in the database.
Source List by Origin	A list of all prospects and from which areas those prospects came from.
Source List by Source	A list of all prospects and from which source those prospects came from.
Market Appraisals	A list of all market appraisals entered. Use the search screen first to limit this search to a date range or price range.
Tenant List	A list of all commercial tenants that suit a new property for lease.
Contacts List by Lister *	A list of all persons with contact details sorted by listing salesperson.
Contacts List by Seller *	A list of all persons with contact details sorted by selling salesperson.
Follow Up List by Lister *	A list of all prospects you should be following up sorted by listing salesperson.
Follow Up List by Seller *	A list of all prospects you should be following up sorted by selling salesperson.
Detailed by Main *	A list of all contact details for all prospects sorted by the default salesperson. Only those prospects with some contact activity lines will be included in these reports.
Detailed by Lister *	A list of all contact details for all prospects sorted by the listing salesperson.
Detailed by Seller *	A list of all contact details for all prospects sorted by the selling salesperson.

Note the reports with an * beside them, use the date search fields available on this screen.

Letters

The Letters screen lists all of the available letters in the database. Standard letters have been already added into the system, however these may be altered to suit your style and other letters may also be added to the list.

The screen is displayed as follows;



The list of people that the selected letter will be sent is listed at the bottom of the screen. If necessary you can go back to the **Search** screen to find a list of people you wish to send the selected letter to first. There are limited search features available on this screen as well. They are ;

Find Allows you find a selection of prospects/vendors to send letters to. You can Find by any of the fields listed on the screen. Once you have found a list of people, you can scroll down through the list to view them before printing letters.

Omit Once you have found a list of people, you can click on anyone on the list then on the **Omit** button to remove them from the list. They will not be removed permanently, just from this selection of people.

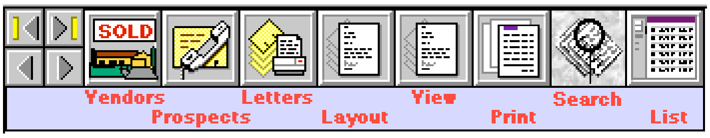
Month This button is at the bottom of the screen performs an automatic search for all vendors that you sold a property to in the current month for any year. This allows you to then send out the anniversary letters to those vendors.

Send After you have found a list of people to send letters to, click on the **Send** button to omit anyone that does not have a **Yes** in the **Send** field. This will allow you to stop sending automatic letters to any person on file that may have advised you such.

Send Letters This option takes you to the screen where any of the user entered letters may be sent to the selected list of prospects. These letters may be entered in the **Write Letters** option and are the same letters that can be attached to **Marketing Programs**. See the **Send Letters** options for more details.

Printing Letters

To print any of the letters, simply click on the name of the letter and the letter will be displayed with the following button panel;



Click on the **Print** button and the selected letter will be printed. Make sure though before you decide to print the letter or letters that you have selected the correct person or group of people to send the letter to.

Single Letters

To print a letter to a single person, select **Find** and type in the address of the property. Make sure the property is on top of the list at the bottom of the screen, then click on the letter. When the print box is displayed, select **Current record Only** as your selection.

Multiple Letters

To print the same letter to a group of people, select that group of people, either from this screen, from the Search screen or from the Enter Listing screen. Once that group of people have been selected, return to the Letters screen and the list of people will be displayed at the bottom of the screen. Now click on the letter you wish to print and when the print box is displayed, select **Records Being Browsed.** This will then start printing letters to all the people on the list.

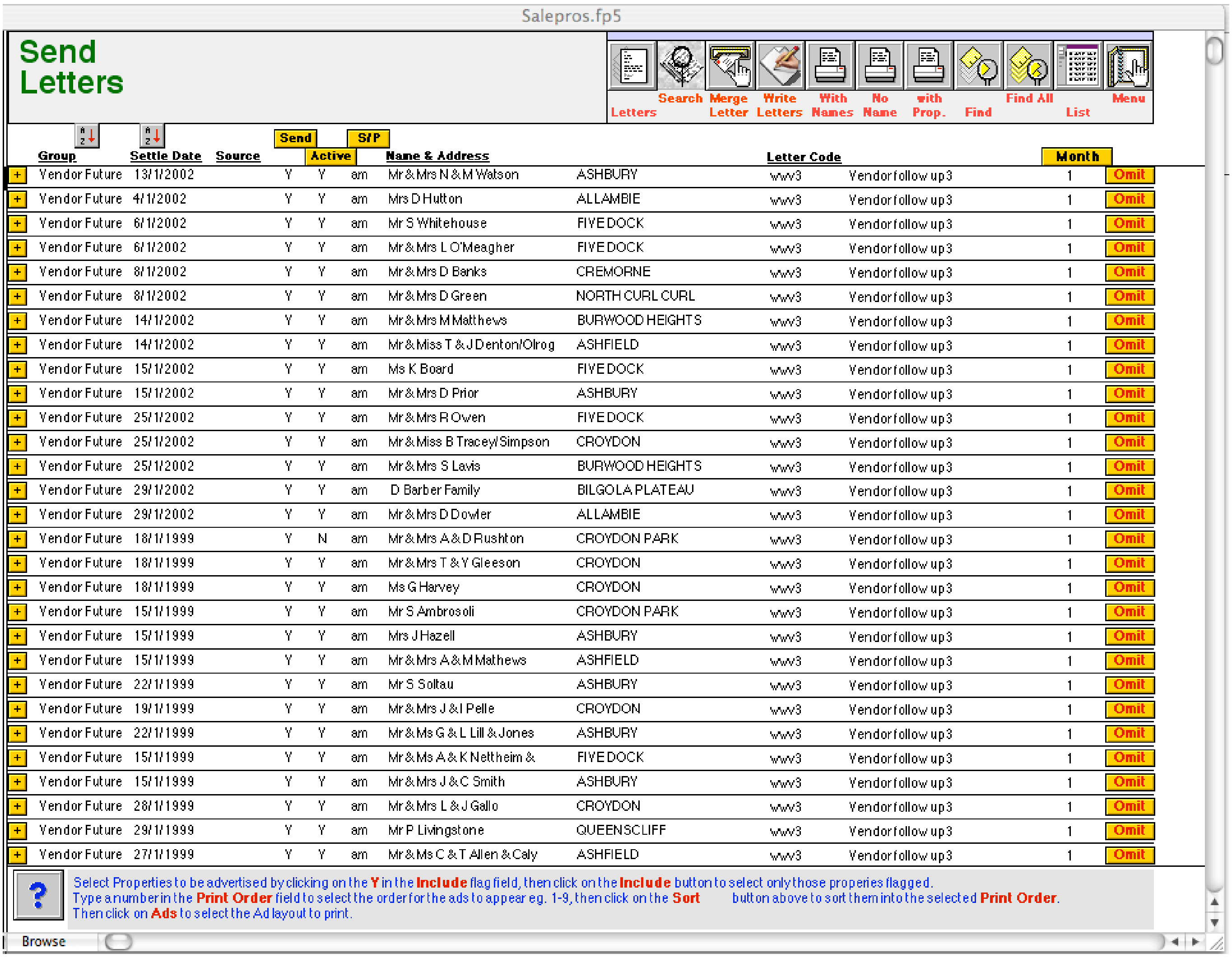
Adding or Changing Letters

The same method as used in the Listing Book to change letters can be used as well for the Sales & Prospects letters. Refer to the section of the manual regarding changing letters for more details.

Send Letters

While the above letters are what we consider as being fixed letters that may be changed and then locked in place for future use without change, there is a further option to enter and send letters that may be changed at any time or extended to include any other letters that you wish to add to the list. The only restriction on these type of letters is the formatting of the letters which is very standard and cannot be changed. The letters are just typed and sent without any further formatting or changes involved. No merged fields can be added to these letters with the exception of the prospects name and address at the top and the salespersons name and agents name at the bottom which are automatically merged in. If you want to send a specially formatted letter with customized graphics, layouts and fonts, then you learn to use Filemaker and gain control over the formatting capabilities of the program.

The send letters option displays the following screen;



Group	Settle Date	Source	Send	Active	S/P	Name & Address		Letter Code		Month	
Vendor Future	13/1/2002		Y	Y	am	Mr & Mrs N & M Watson	ASHBURY	wv3	Vendor follow up3	1	Omit
Vendor Future	4/1/2002		Y	Y	am	Mrs D Hutton	ALLAMBIE	wv3	Vendor follow up3	1	Omit
Vendor Future	6/1/2002		Y	Y	am	Mr S Whitehouse	FIVE DOCK	wv3	Vendor follow up3	1	Omit
Vendor Future	6/1/2002		Y	Y	am	Mr & Mrs L O'Meagher	FIVE DOCK	wv3	Vendor follow up3	1	Omit
Vendor Future	8/1/2002		Y	Y	am	Mr & Mrs D Banks	CREMORNE	wv3	Vendor follow up3	1	Omit
Vendor Future	8/1/2002		Y	Y	am	Mr & Mrs D Green	NORTH CURL CURL	wv3	Vendor follow up3	1	Omit
Vendor Future	14/1/2002		Y	Y	am	Mr & Mrs M Matthews	BURWOOD HEIGHTS	wv3	Vendor follow up3	1	Omit
Vendor Future	14/1/2002		Y	Y	am	Mr & Miss T & J Denton/Olrog	ASHFIELD	wv3	Vendor follow up3	1	Omit
Vendor Future	15/1/2002		Y	Y	am	Ms K Board	FIVE DOCK	wv3	Vendor follow up3	1	Omit
Vendor Future	15/1/2002		Y	Y	am	Mr & Mrs D Prior	ASHBURY	wv3	Vendor follow up3	1	Omit
Vendor Future	25/1/2002		Y	Y	am	Mr & Mrs R Owen	FIVE DOCK	wv3	Vendor follow up3	1	Omit
Vendor Future	25/1/2002		Y	Y	am	Mr & Miss B Tracey/Simpson	CROYDON	wv3	Vendor follow up3	1	Omit
Vendor Future	25/1/2002		Y	Y	am	Mr & Mrs S Lavis	BURWOOD HEIGHTS	wv3	Vendor follow up3	1	Omit
Vendor Future	29/1/2002		Y	Y	am	D Barber Family	BILGOLA PLATEAU	wv3	Vendor follow up3	1	Omit
Vendor Future	29/1/2002		Y	Y	am	Mr & Mrs D Dowler	ALLAMBIE	wv3	Vendor follow up3	1	Omit
Vendor Future	18/1/1999		Y	N	am	Mr & Mrs A & D Rushton	CROYDON PARK	wv3	Vendor follow up3	1	Omit
Vendor Future	18/1/1999		Y	Y	am	Mr & Mrs T & Y Gleeson	CROYDON	wv3	Vendor follow up3	1	Omit
Vendor Future	18/1/1999		Y	Y	am	Ms G Harvey	CROYDON	wv3	Vendor follow up3	1	Omit
Vendor Future	15/1/1999		Y	Y	am	Mr S Ambrosoli	CROYDON PARK	wv3	Vendor follow up3	1	Omit
Vendor Future	15/1/1999		Y	Y	am	Mrs J Hazell	ASHBURY	wv3	Vendor follow up3	1	Omit
Vendor Future	15/1/1999		Y	Y	am	Mr & Mrs A & M Mathews	ASHFIELD	wv3	Vendor follow up3	1	Omit
Vendor Future	22/1/1999		Y	Y	am	Mr S Soltau	ASHBURY	wv3	Vendor follow up3	1	Omit
Vendor Future	19/1/1999		Y	Y	am	Mr & Mrs J & I Pelle	CROYDON	wv3	Vendor follow up3	1	Omit
Vendor Future	22/1/1999		Y	Y	am	Mr & Ms G & L Lill & Jones	ASHBURY	wv3	Vendor follow up3	1	Omit
Vendor Future	15/1/1999		Y	Y	am	Mr & Ms A & K Nettheim &	FIVE DOCK	wv3	Vendor follow up3	1	Omit
Vendor Future	15/1/1999		Y	Y	am	Mr & Mrs J & C Smith	ASHBURY	wv3	Vendor follow up3	1	Omit
Vendor Future	28/1/1999		Y	Y	am	Mr & Mrs L & J Gallo	CROYDON	wv3	Vendor follow up3	1	Omit
Vendor Future	29/1/1999		Y	Y	am	Mr P Livingstone	QUEENSCLIFF	wv3	Vendor follow up3	1	Omit
Vendor Future	27/1/1999		Y	Y	am	Mr & Ms C & T Allen & Caly	ASHFIELD	wv3	Vendor follow up3	1	Omit

Select Properties to be advertised by clicking on the **Y** in the **Include** flag field, then click on the **Include** button to select only those properies flagged.
Type a number in the **Print Order** field to select the order for the ads to appear eg. 1-9, then click on the **Sort** button above to sort them into the selected **Print Order**.
Then click on **Ads** to select the Ad layout to print.

After this screen is displayed click on **Select Letter** so a list of available letters will be displayed. These letters are those that have been entered through the **Letters** option available from the **Main Menu.** See the notes on the **Letters** option that describe how to add and edit letters in this part of the system.

Once the letter has been selected from this list, click on the **Continue** button in the left margin or press the **Enter** key on the numeric keypad. Without completing this step, the printing of letters will not work so make sure this step is completed.

As soon as **Continue** is selected the selected letter will be merged with all of the selected vendors or purchasers. The selected letter is now ready to be sent to the selected persons. Click on **Print** and the Print prompt will be displayed and you can select the Print Destination, Print Setup and the records the letter is to be sent to. After the letter is printed for each of the selected records, an **Contact** record will be recorded against that listing file detailing which letter was sent and when it was sent.

There are a limited number of fields available to search on in this screen. You can either use these fields to search, or do your search in the Search screen or Prospects or Vendors screen first before coming to the Send Letters screen. Whatever list of prospects you have already found will be listed here on this screen when you open it.

The other options available on this screen are;

Search	This will display the **Search** screen where a different selection of **Prospects** may be selected to be sent Letters.
Select letter	This will display the list of available letters allowing a different letter to be selected and merge with the selected list of **Vendor/Purchasers**.
Write Letters	Displays the screen that allows you to add or edit letters to be sent.
List	Displays the **List Menu** screen.
Letters	Displays the **Letters** screen for printing the fixed letters.
With Names	Prints a letter with the salespersons name merged into the bottom of the letter.
No Name	Does not include the salesperson name and title at the bottom of the letter so this may be added to the letter when it is added. This is useful for a letter from the principal to all prospects for instance, where the standard letter will always have the listing salespersons name on the bottom, the No Name letter can be addresses from the one person.
With Prop.	This letter style includes a Re: line with the property address merged in. This is suitable for appraisal and vendor letters where you want to quote the vendors property address.

Envelopes

This option will print out an envelope to the currently selected prospect or vendor, or a number of prospects or vendors.

The number of envelopes printed depends on the number of records selected and whether the Current Record only option (Single Envelope) or the Records being browsed option (multiple records) is selected at the Print dialogue window.

The envelope that is printed is designed to fit on laser printer that accepts a centrally fed letter (i.e. not positioned on the left or the right). This is common to the Apple Laserwriter II range of printers. To change this to suit other laser writers, you may go into the Layout and Design mode and select the envelope layout. Then simply move the Header line up or down to suit your laser writer.

Labels

The Labels option is designed to print out a sheet of labels with the selected range of prospects on them.

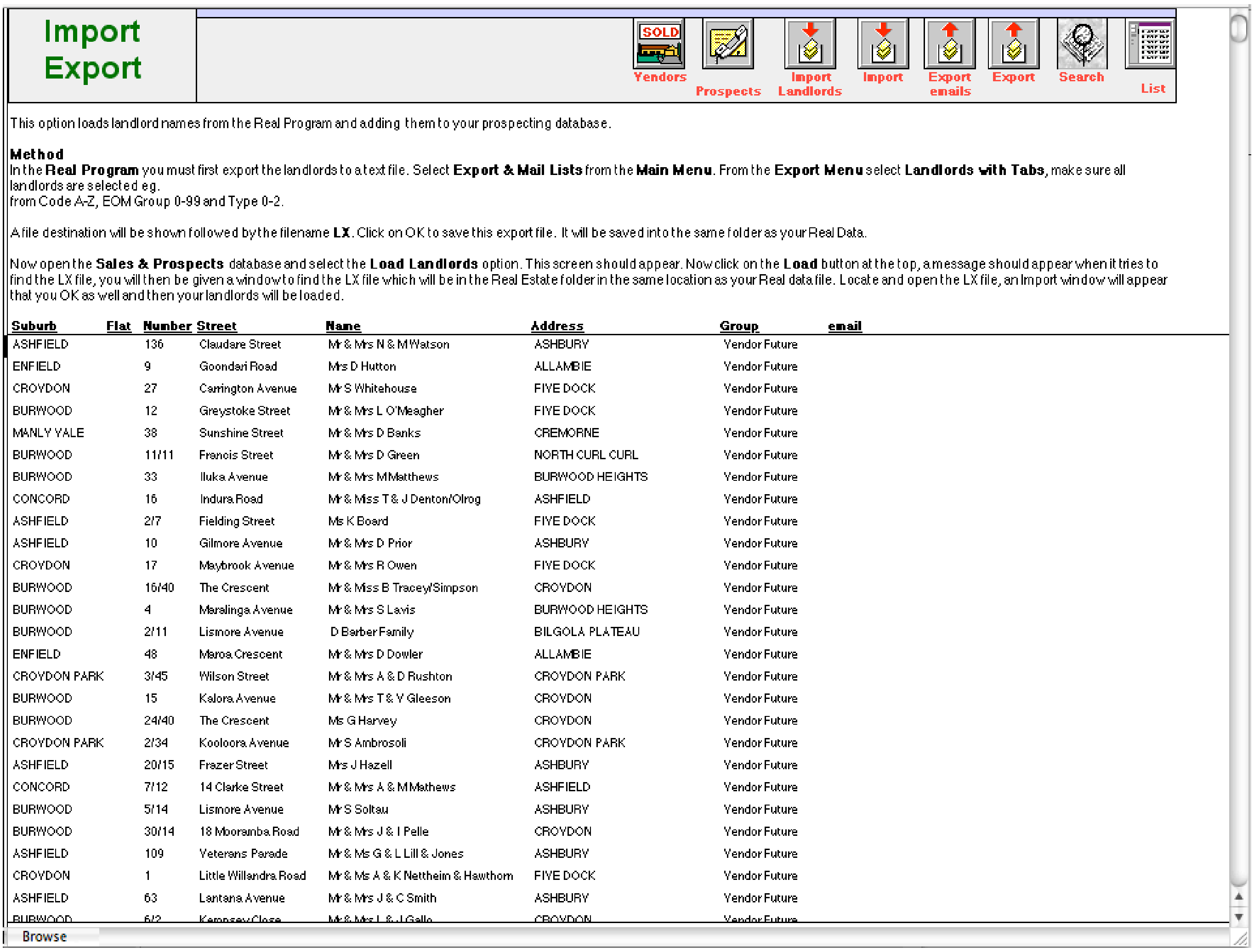
The label type used is the designed for a Laserwriter and prints on an A4 sheet of paper, two across and 8 down the page.

We use labels from Xerox with code 3R97407 Type U. These labels measure 32mm by 110mm or 1 1/2" by 4 1/4 ".

Make sure the Records being browsed option is selected when printing labels so you get more than just one label printed.

Import & Export

These options allow you to export a list of prospects to text file for merging into another program. The file may be saved as Tab delimited or Comma delimited, one field per line, or in many other formats to suit all sorts of programs.



This option loads landlord names from the Real Program and adding them to your prospecting database.

Method
In the **Real Program** you must first export the landlords to a text file. Select **Export & Mail Lists** from the **Main Menu**. From the **Export Menu** select **Landlords with Tabs**, make sure all landlords are selected eg.
from Code A-Z, EOM Group 0-99 and Type 0-2.

A file destination will be shown followed by the filename **LX**. Click on OK to save this export file. It will be saved into the same folder as your Real Data.

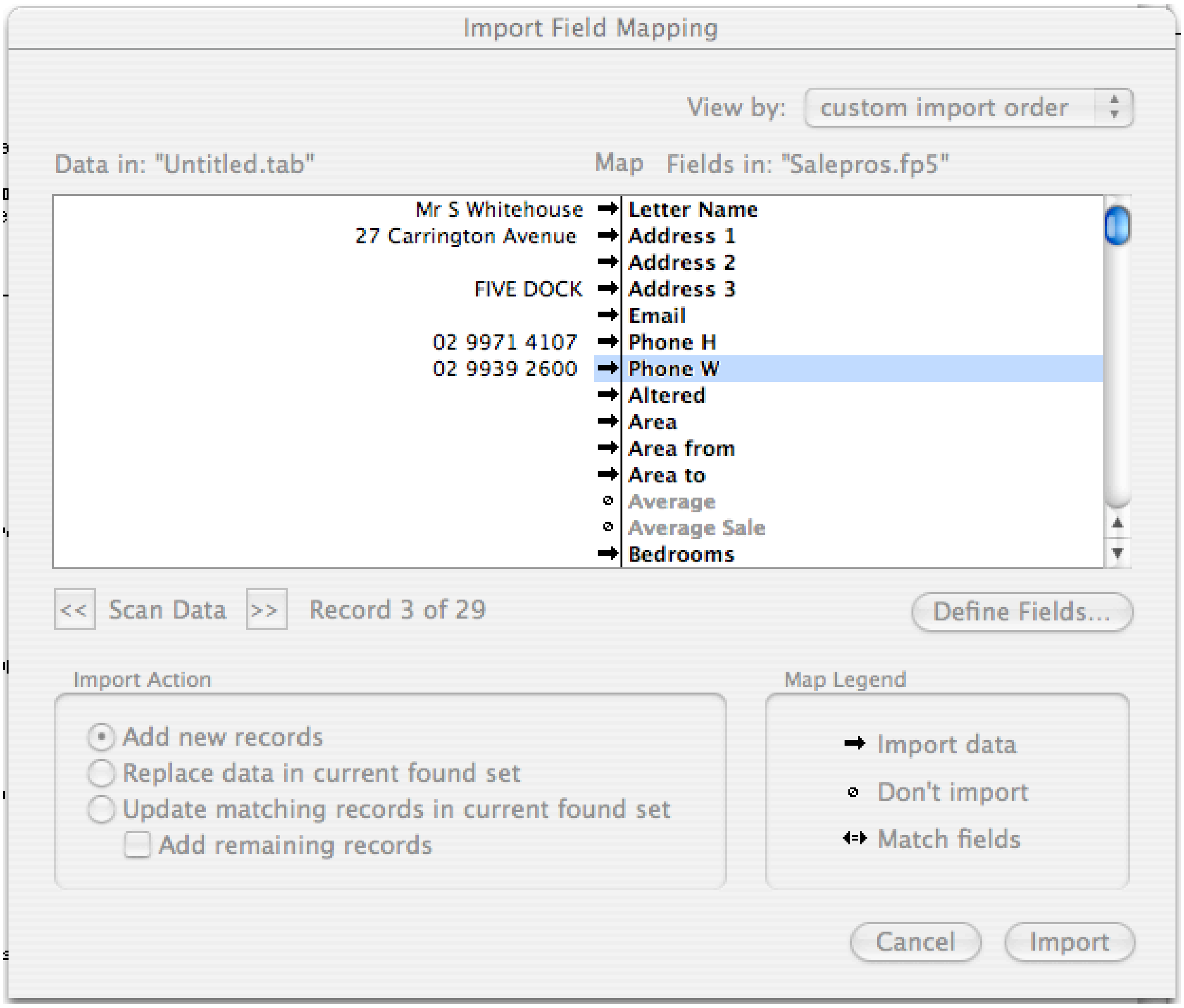
Now open the **Sales & Prospects** database and select the **Load Landlords** option. This screen should appear. Now click on the **Load** button at the top, a message should appear when it tries to find the LX file, you will then be given a window to find the LX file which will be in the Real Estate folder in the same location as your Real data file. Locate and open the LX file, an Import window will appear that you OK as well and then your landlords will be loaded.

Suburb	Flat	Number	Street	Name	Address	Group	email
ASHFIELD		136	Claudare Street	Mr & Mrs N & M Watson	ASHBURY	Vendor Future	
ENFIELD		9	Goondari Road	Mrs D Hutton	ALLAMBIE	Vendor Future	
CROYDON		27	Carrington Avenue	Mr S Whitehouse	FIVE DOCK	Vendor Future	
BURWOOD		12	Greystoke Street	Mr & Mrs L O'Meagher	FIVE DOCK	Vendor Future	
MANLY VALE		38	Sunshine Street	Mr & Mrs D Banks	CREMORNE	Vendor Future	
BURWOOD		11/11	Francis Street	Mr & Mrs D Green	NORTH CURL CURL	Vendor Future	
BURWOOD		33	Iluka Avenue	Mr & Mrs M Matthews	BURWOOD HEIGHTS	Vendor Future	
CONCORD		16	Indura Road	Mr & Miss T & J Denton/Olrog	ASHFIELD	Vendor Future	
ASHFIELD		2/7	Fielding Street	Ms K Board	FIVE DOCK	Vendor Future	
ASHFIELD		10	Gilmore Avenue	Mr & Mrs D Prior	ASHBURY	Vendor Future	
CROYDON		17	Maybrook Avenue	Mr & Mrs R Owen	FIVE DOCK	Vendor Future	
BURWOOD		16/40	The Crescent	Mr & Miss B Tracey/Simpson	CROYDON	Vendor Future	
BURWOOD		4	Maralinga Avenue	Mr & Mrs S Lavis	BURWOOD HEIGHTS	Vendor Future	
BURWOOD		2/11	Lismore Avenue	D Barber Family	BILGOLA PLATEAU	Vendor Future	
ENFIELD		48	Maroa Crescent	Mr & Mrs D Dowler	ALLAMBIE	Vendor Future	
CROYDON PARK		3/45	Wilson Street	Mr & Mrs A & D Rushton	CROYDON PARK	Vendor Future	
BURWOOD		15	Kalora Avenue	Mr & Mrs T & Y Gleeson	CROYDON	Vendor Future	
BURWOOD		24/40	The Crescent	Ms G Harvey	CROYDON	Vendor Future	
CROYDON PARK		2/34	Kooloora Avenue	Mr S Ambrosoli	CROYDON PARK	Vendor Future	
ASHFIELD		20/15	Frazer Street	Mrs J Hazell	ASHBURY	Vendor Future	
CONCORD		7/12	14 Clarke Street	Mr & Mrs A & M Mathews	ASHFIELD	Vendor Future	
BURWOOD		5/14	Lismore Avenue	Mr S Soltau	ASHBURY	Vendor Future	
BURWOOD		30/14	18 Mooramba Road	Mr & Mrs J & I Pelle	CROYDON	Vendor Future	
ASHFIELD		109	Veterans Parade	Mr & Ms G & L Lill & Jones	ASHBURY	Vendor Future	
CROYDON		1	Little Willandra Road	Mr & Ms A & K Nettheim & Hawthorn	FIVE DOCK	Vendor Future	
ASHFIELD		63	Lantana Avenue	Mr & Mrs J & C Smith	ASHBURY	Vendor Future	
BURWOOD		6/2	Kempsey Close	Mr & Mrs L & J Gallo	CROYDON	Vendor Future	

Browse

The import option allows you to import a file of prospects from any other programs. A standard import format is available to import Landlords from Realpro and RealproX. In other case you need to do a field match to get the data into the correct fields.

When this option is selected you will be prompted for a file name. Select your file (which must be a text file in one of the above formats), and then line up the fields coming in with the fields in the database.



You may change the import order by dragging the field names on the right hand side up and down to line up with the data on the left side. By varying the order you may bring in data from almost any other program.

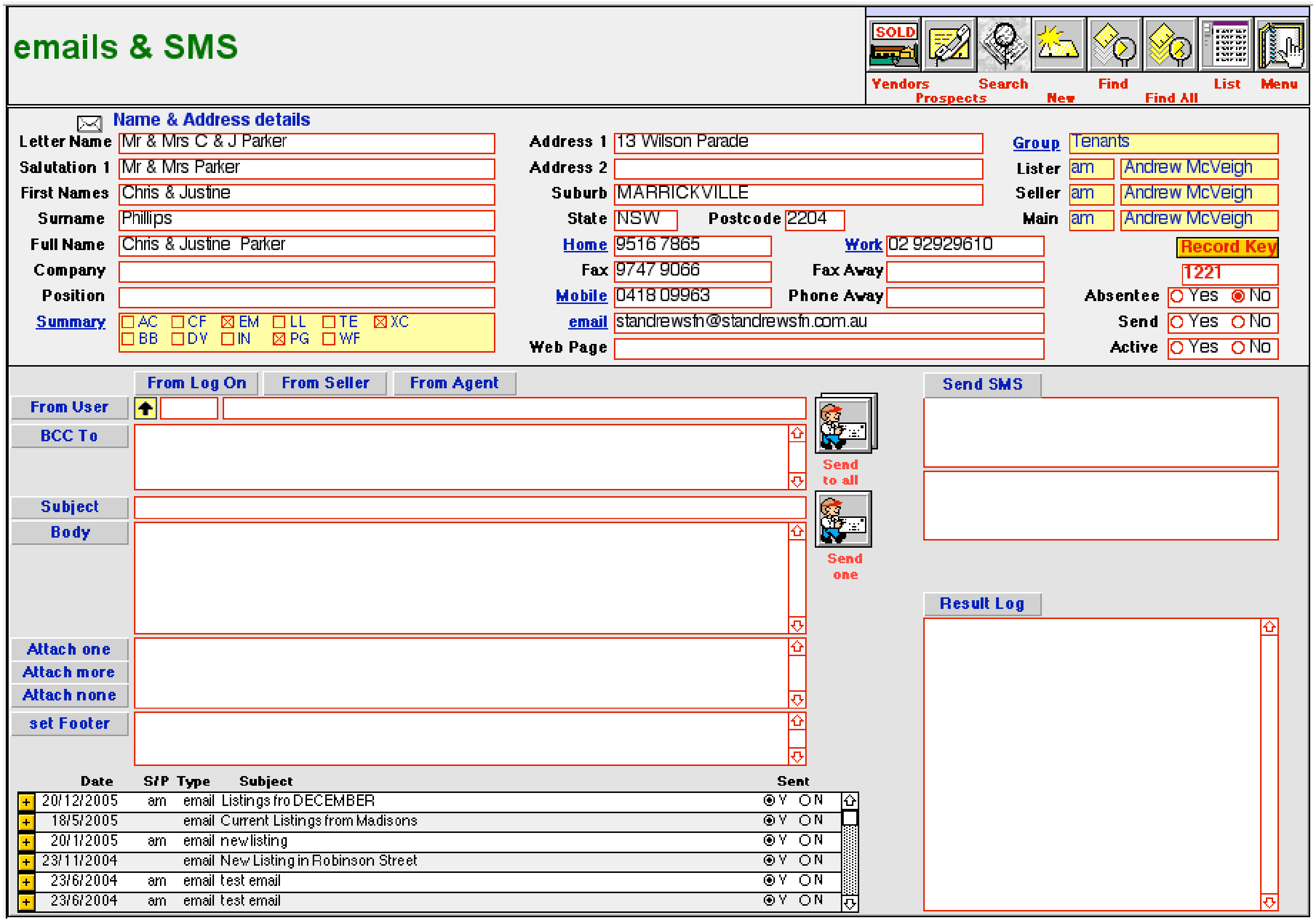
In practice if you have a data file you wish to import into Listpro it is always best to consult Surfway first to get the field matching correct and prevent adding a stack of records into the wrong fields.

Export emails
This is an export format suitable for importing contacts into Outlook or any other email program or other address book. Only the basic field required for emailing are exported with this format.

Export
This option allows you to select the fields that you wish to export so you extract any sort of data from Listpro that you may need for other purposes.

Emails and SMS

The email and SMS screen is used to send bulk emails or SMS to prospects. Prior to opening this screen you should have conducted a search to find the groups of prospects that you wish to email or SMS to.



Sending emails

This screen is set up to enable you send standard emails to a large number of clients, in effect bulk emaiing. Keep in mind though that not all email providers permit bulk emails to be sent out as they recognize this as spam so if you are having problems sending 110's pr 1000,s of email then it may be your internet email supplier that is the problem and not Listpro.

If your intention is to send a single email to a client then sometimes it easier to do so through your standard email program rather than through Listpro. Any emails sent through Listpro will be recorded against the clients contact notes so this may be preferable if you want to keep track of all emails sent to clients.

Steps to send bulk emails

1. The first step is to find the list of clients that you want to send the email to. Do this in the search screen before you select the email screen.

2. Select who you are sending the email from. The options here are **Agent** which will send the email from the standard email address set up in the Agent file, **From Log On** which will send the email from the Salesperson whose log on name came up when Listpro was

opened, **From User** who will be the User Name that was entered at Log on, or click on the to select from a list of Salespersons or staff to send the email from. Two options are most used here. If you are the salesperson working on your own computer then use the **From User** option. If you are a sales support person then use the to select the person that you are sending the emails on behalf of.
Note that if the selected salesperson does not have an email address entered in the Salesperson file then selecting them as the From email address will not work using any of the above methods.

3. Click on BCC to to select all the email addresses from the selected group of prospects.

4. Type in the subject of the email. No emails will be sent if there is no subject.

5. Type in the body of the email. No email will be sent without something in the body.

6. Click on **Attach** to attach any document to the email. This document should be a PDF if you want all recipients to be able to read it. The PDF can be generated from the Listings as an ad format if necessary.

7. Select either Send One or Send All to send the email out to all selected prospects. It is always a good idea to include yourself in the list of prospects to make sure that the email went out successfully.

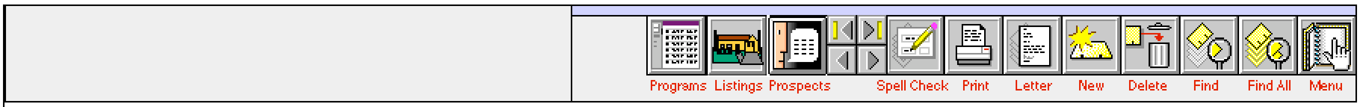
All emails sent out will be recorded in the Contacts list for each Prospect.

Results Log

Always check the results log shown on the right hand side for any errors that may have prevented the emails from being sent successfully. The list of email addresses to be sent to will be listed there with the errors shown at the bottom. Generally any error except for the Show Status not supported by Mac OSX will prevent the emails being sent.
An invalid email address amongst all of the good addresses will also stop the email so make sure that email addresses are always entered correctly. The fact that the email address does not exist will not stop the email and those unknown addresses will be returned as Mail returned.

Write Letters

This option is used to write the variable letters that may be sent out to vendors, purchasers and prospects. Any number of letters may be added to the letters file, each one should have a different code for merging with the names and address selected. Letters may also be attached to **Marketing Programs** for automatic printing each day or week.
No fields may be merged into these letters, the name and address and salutation is automatically placed at the top of the letter and the selected salesperson and agents name is placed at the bottom of the letter. The body of the letter is then made up of whatever is entered into the letters file.
The list of available letters is displayed as follows;



Code	Purpose	Letter
MA1	First Letter to Follow a MA	Thank you for the opportunity to inspect your property and provide you wth a market analysis of it
MA2	Second Letter to Follow a MA	This is a sample letter that should follow 14 days after a MA if the listing has not been signed up
oh1	First letter to follow open house visit	I'm writing to thank you for attending our **"Open House"** recently and to find out if I can be
MA1AM	First Letter to Follow a MA	This is a sample letter that should follow 7 days after a MA for ANDREW McVeigh re your
MA3	Last Letter to Follow a MA	
MA4	Hand written Thankyou card	
MR	Market Report letter low motivation	ouwhcvoiwj mwo ifuweo fjc;owieh
TR2 Kennard	Kennards letter & brochure	Time is ticking away, so packing and moving must be on your mind.
TR2 checklist	Handy checklist sent out to purchaser	Just a quick note enclosing a purchasers handy checklist to guide you through until
TR2 chedist V	Handy checklist sent out to vendor	Just a quick note enclosing a vendor handy checklist to guide you through until settlement.
TR2 Survey	Survey 3 after settlement	Now that the sale of your property is complete, my purpose in wiriting to you, is to make sure that
TR2 home ide	Home ideas centre brochure	Thinking of building, extending or renovation!
TR2 notepad	Note pad letter after settlement	*Friends for life....*
oh2	Second letter to follow open house	It is now one month since you visited an open house conducted by our office. In that short time our
oh3	Final open house letter	It is some time now since you last visited a property that we had open for inspection. As we have
sale1	First letter after completion of sale	We would like to take this opportunity to congratulate you on the purchase of your new property
sale2	1 year anniversary letter	One year has passed since you bought your new house through our office and we would like to

Depending on which of the Letters screens was last used in this database will depend on whether this List screen or the Letter entry screen is displayed. If the Letter Entry screen is displayed then click on the **List** button to display this screen.

Other options available include;

Listings Takes you to the List Book database.

Prospects Takes you back to the Sales and Prospects database.

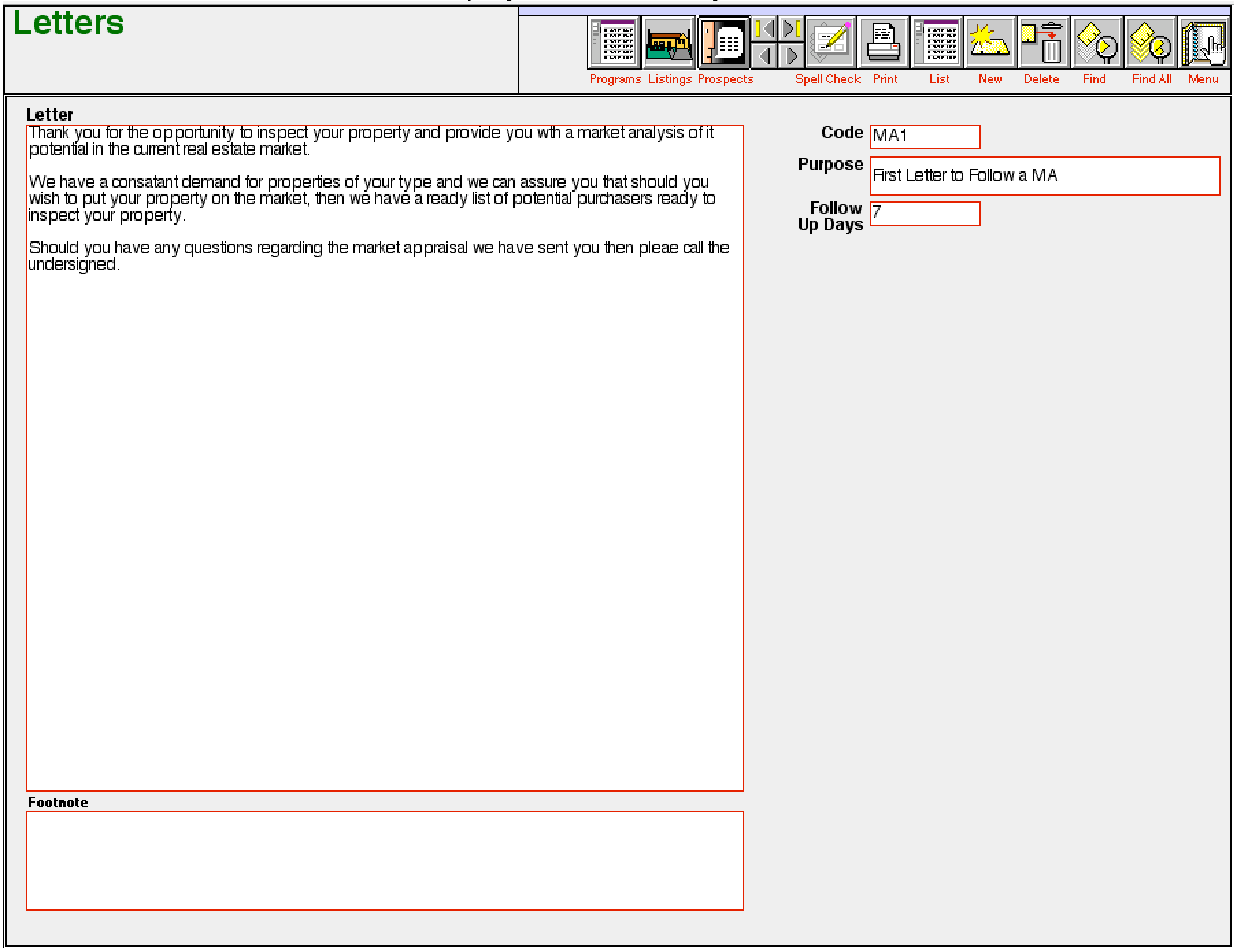
Print Will print out a sample of the letter displayed so you can check the formatting of the letter.

New Creates a new letter. Make sure to enter a unique code for the letter and a description of the purpose of the letter. The **Follow Up Days** field is used to generate an automatic follow up activity for the vendor/prospect a set number of days after the letter is printed.

Programs Takes you to the **Programs** database where the letters can be combined with other letters into a **Marketing Program**.

To see the details of any of the letters or to add another letter either click on the **Letter** button or the + button beside the letter you wish to view.

Either of these methods will then display the Letter Entry screen as follows;



To change the displayed letter simply click in the text and type. The text of the letters is designed to fit between the salutation at the top of letters and the salespersons name at the bottom of the letter. Use the **Spell Check** option once the letter has been finished.

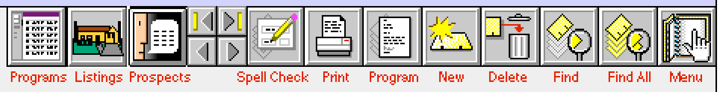
You can use the Format menu to change the style and font of the text so the letters can be made to look very effective and creative. You do not have to stick to the same font and size.

Programs

Marketing Programs are the way to automate the following up of prospects so that a daily list of letters to be printed and phone calls to be made can be produced for each salesperson. A program can combine a number of letters plus follow up calls or activities and can be assigned to any vendor, purchaser or prospect in the database.

The Programs screen is displayed as follows;

Programs List



Code	Purpose	Date	Salesperson
LAhot	Listing Appointment Follow up Hot Seller	Appraisal	
Trail 1	Possible Vendor Low Motivation	Appraisal	
Trail 2	Vendor Awaiting Settlement	Exchanged	
Trail 3	Purchaser Awaiting Settlement	Exchanged	
Trail 4	Vendor after exchange	Exchanged	
Trail 5	Purchaser after Settlement		
oh1am	Open House follow up program	Today	amm
Sale1	Sale follow up with anniversary letters	Settled	
wwbuy	Follow up a sale of property	Settled	
pa	Purchaser	Today	
MAcold	to follow up long term seller	Appraisal	
MAlong	Market Appraisal Follow up long term	Appraisal	
AdList	Admin program for new listing	Listed	amm
MAhot	Market Appraisal Follow up Hot Seller	Appraisal	
LAhot	Listing Appointment Follow up Hot Seller	Appraisal	
VE	2 - Vendor Exchanged	Exchanged	SA
PE	3 - Purchaser Exchanged	Exchanged	SA

As shown in the sample on the screen, a program must have a unique code and description indicating its Purpose. The **Date** field is important as it indicates from which date in the database the program will be started from. So in the following example the program is designed to automate the follow up of all Listing Appointments (Market Appraisals) performed by salespersons. It will start from the date of the appraisal (entered in the prospects or vendors screen) and will have 4 activities. The first is a follow up phone call two days after the appraisal, followed by a letter (MA1) 7 days after the appraisal, another phone call in 10 days and a final letter (MA2) in 14 days. Once this program has been allocated to a prospective vendor, those 4 activities will be added to the daily diary and will appear on the allocated salespersons daily sheet or be printed out as a letter.

Appraisal
Listed
Auction
Deposit
Exchanged
Cool Off
Anticipated
Settled
Appraisal
Today

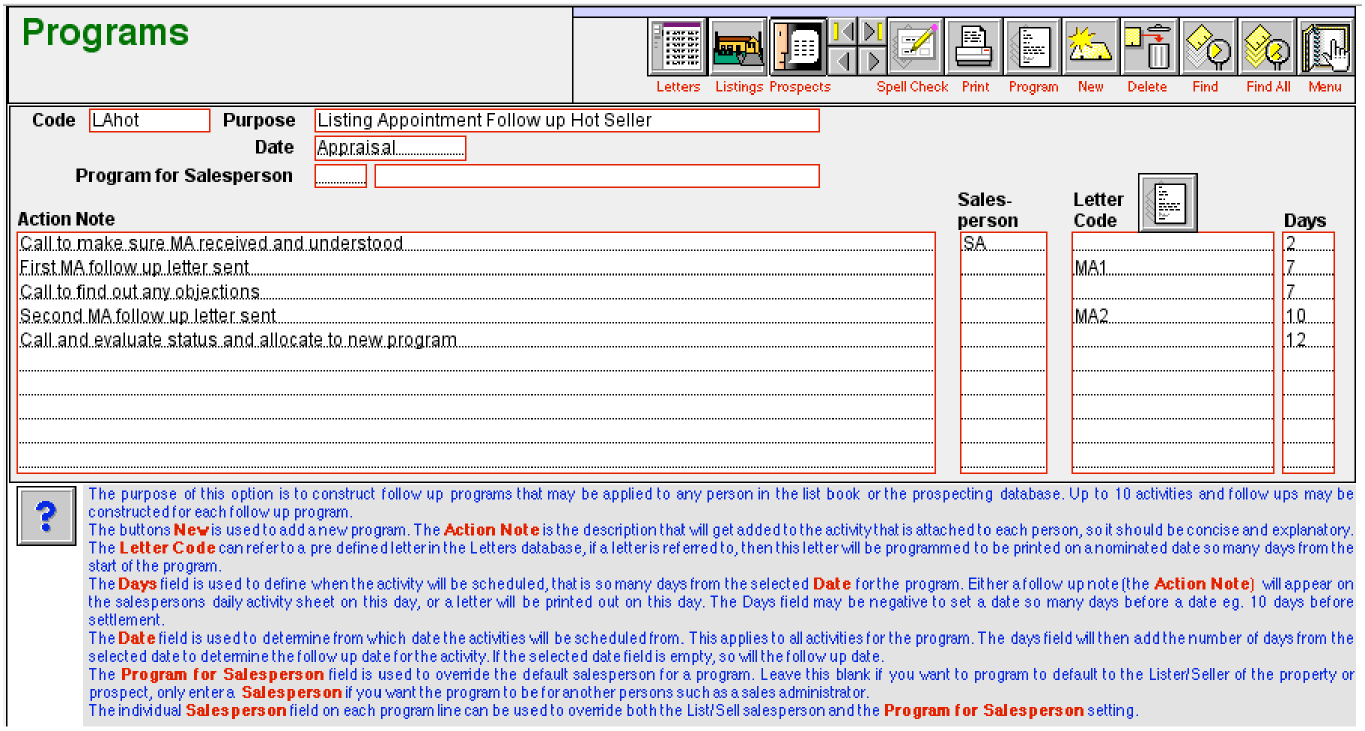
These are the dates that a program may be started from, obviously the first 7 dates are related to Listings in the List Book while the final two dates are for prospects.

If in doubt about which date to start the program from, then use todays date so the program will at least go forward from today.

Programs can be allocated in the **Contacts** screen of both Prospects and List Book databases. More than one program can be allocated to a vendor/prospect and a program can be removed as well.

The idea behind using the programs is to establish a number of standard follow up programs that suit your agency. Then write the letters that are to be sent as part of that program and then combine them into the program database. The follow up days and date are then used to schedule the activities of the program for inclusion in the daily activities sheets for each salesperson.

Clicking on the Program button or the + button will display the details of the Program.



Each Program may be allocated entirely to a salesperson or staff member by using the Program for Salesperson field. This is useful when salespersons or staff members have designated roles within the office. So after a property has exchanged for instance, there might be a program allocated for a sales support staff member as well as a program for the seller of the property. In this case the Program for Salesperson field would be filled in for the Sales Support program but not for the Seller's program.
If not salesperson or staff member is filled in this field then the program will default to either the listing salesperson for a new vendor or prospect, or the selling salesperson for a purchaser of a listing.

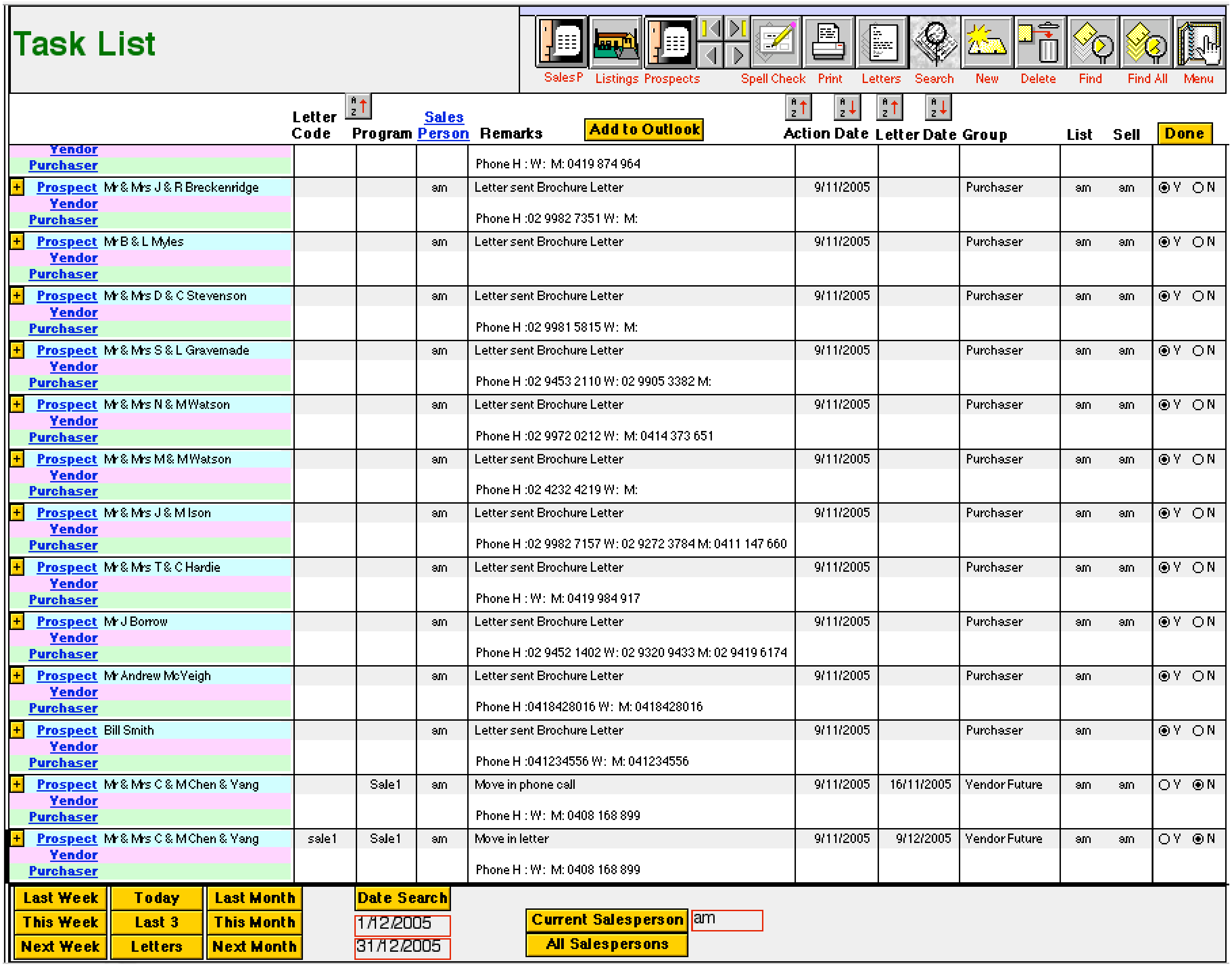
In addition to allocating the whole program to a salesperson, individual lines on the program may be allocated to staff members or salesperson. So in the example above line 1 of the program has been allocated to staff member SA who is the Sales Administrator. The rest of the lines are allocated to no one so they will be allocated to the default salesperson.

The default salesperson is defined as follows;
Listings – Vendor programs to lister of property, Purchaser programs to seller of property.
Prospects – Future Vendors to selling salesperson, all others to Listing salesperson.

Contacts

This option is used to print out the daily letters and task sheets generated by contact tasks either typed in or generated automatically through programs.

The Contacts screen is accessed from the Main Menu and appears as follows;



The way to use this screen is to decide on what period of time you wish to print out the letters or tasks and then select that period from the buttons on the bottom of the screen. For a busy office with lots of tasks the **Today** button should be used each and every day to produce the reports and letters. The **Letters** button will call up just the letters to be printed today. For a single salesperson using the system when less tasks are involved the **This Week** or **Next Week** buttons may be used. The **Last Week** and **Last Month** buttons should be used only as a form of checking that no activities have been forgotten.

Use the **All Salespersons** button to print the reports and letters for everybody in the office, or use the **Current Salesperson** button to print the reports and letters for the Salesperson selected in the Main Menu. Select either one or all salespersons before selecting the date range. Alternative click on the **Salesperson** heading to filter any search down to the current salesperson logged on.

The relevant buttons available on this screen are;

Listings Takes you to the List Book database.

Prospects Takes you back to the Sales and Prospects database.

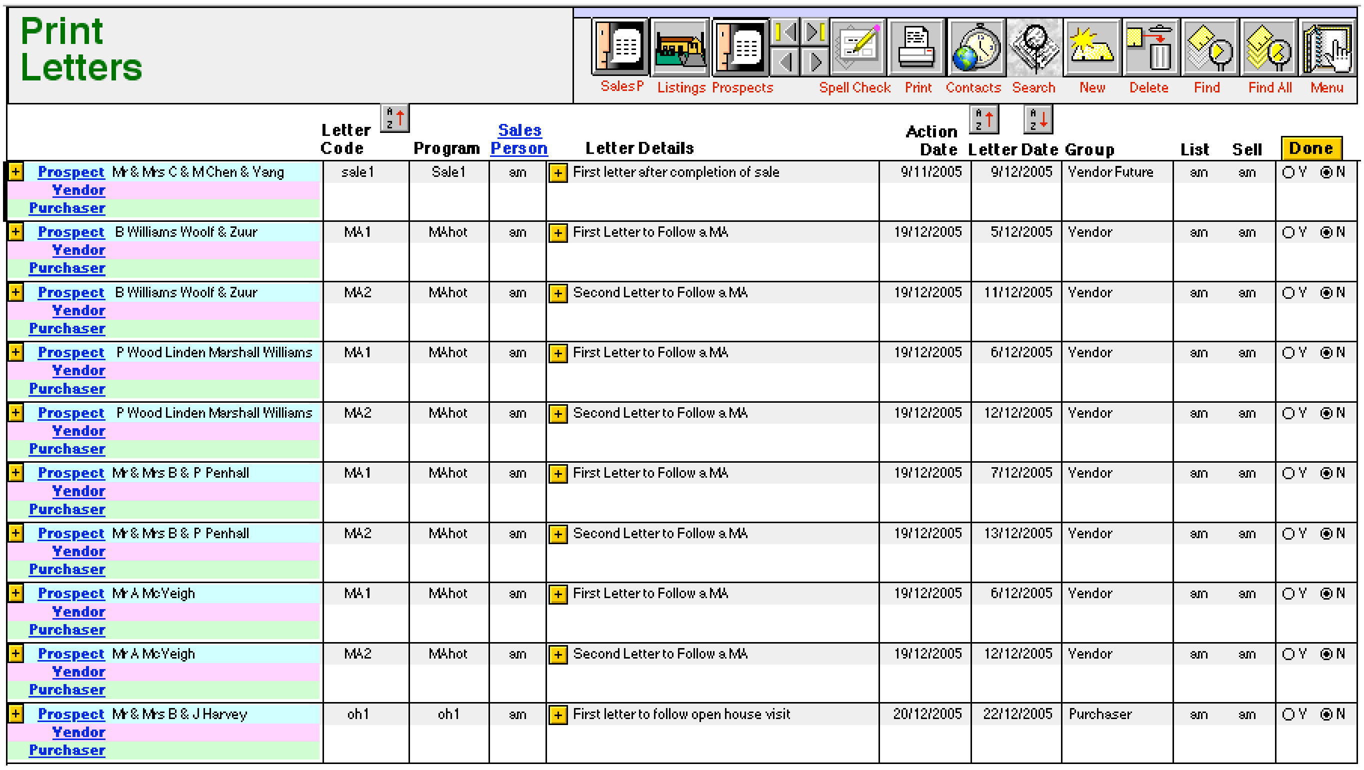
Salespersons Takes you back to the Salespersons list.

Letters Displays the Letters screen from where any letters to be printed may be selected.

Print Starts the printing of the daily task sheets for the selected range of activities. Use it in the same way as the Letters option i.e. select the salespersons and date range then **Print**. If you are printing the sheets straight after the letters then you do not need to make the selection again as the same one used for the letters should be used for the Task Sheet. It may be more suitable to do the Task Sheets before the letters so you know which letters are about to be printed. In this case the selection must be made first before the **Print** button and then it does not have to be repeated before the **Letters** option is used.

Letters

The Print letters screen is displayed as follows by clicking on the Letters button in the contacts screen.


Print Letters

SalesP Listings Prospects Spell Check Print Contacts Search New Delete Find Find All Menu

	Letter Code	Program	Sales Person	Letter Details	Action Date	Letter Date	Group	List	Sell	Done
Prospect Mr & Mrs C & M Chen & Yang / Vendor / Purchaser	sale1	Sale1	am	First letter after completion of sale	9/11/2005	9/12/2005	Vendor Future	am	am	Y N
Prospect B Williams Woolf & Zuur / Vendor / Purchaser	MA1	MAhot	am	First Letter to Follow a MA	19/12/2005	5/12/2005	Vendor	am	am	Y N
Prospect B Williams Woolf & Zuur / Vendor / Purchaser	MA2	MAhot	am	Second Letter to Follow a MA	19/12/2005	11/12/2005	Vendor	am	am	Y N
Prospect P Wood Linden Marshall Williams / Vendor / Purchaser	MA1	MAhot	am	First Letter to Follow a MA	19/12/2005	6/12/2005	Vendor	am	am	Y N
Prospect P Wood Linden Marshall Williams / Vendor / Purchaser	MA2	MAhot	am	Second Letter to Follow a MA	19/12/2005	12/12/2005	Vendor	am	am	Y N
Prospect Mr & Mrs B & P Penhall / Vendor / Purchaser	MA1	MAhot	am	First Letter to Follow a MA	19/12/2005	7/12/2005	Vendor	am	am	Y N
Prospect Mr & Mrs B & P Penhall / Vendor / Purchaser	MA2	MAhot	am	Second Letter to Follow a MA	19/12/2005	13/12/2005	Vendor	am	am	Y N
Prospect Mr A McVeigh / Vendor / Purchaser	MA1	MAhot	am	First Letter to Follow a MA	19/12/2005	6/12/2005	Vendor	am	am	Y N
Prospect Mr A McVeigh / Vendor / Purchaser	MA2	MAhot	am	Second Letter to Follow a MA	19/12/2005	12/12/2005	Vendor	am	am	Y N
Prospect Mr & Mrs B & J Harvey / Vendor / Purchaser	oh1	oh1	am	First letter to follow open house visit	20/12/2005	22/12/2005	Purchaser	am	am	Y N

Selecting letters to be printed is done by using the date search buttons at the bottom of the screen. If you have many letters to be sent out then you will most likely use the **Today** button for each days letters and then the **Last 3** button on Mondays to pick up Monday plus the Weekends letters that may have been missed. For less busy offices the weekly buttons may be used so that on Monday use the **This Week** button to find all letters to be printed this week. Each time letters are printed the **Done** flag is set so that on the following Monday you may use the **Last Week** button followed by the **Done** button to find those letters due to be printed last week but actually done. The main reason for this is that the letters may not have been scheduled to be printed till after the Monday so they missed the last Mondays run but can be pricked up by this Mondays run by the combination of **Last Week** and the **Done** buttons.

Print — Starts the printing of any letters that are part of the selected activities. The way to use this for example is to select **All Salespersons** then select **Today** then **Letters** to print out all scheduled letters for all salespersons that are due today.

<u>Date Selection Buttons</u>

These buttons work the same in either the **Contacts** screen or the **Letters** screen with some exceptions that are noted.

Last Week	Will list all contacts/letters due last week, i.e. within the last 7 days.
This week	Will list all contacts/letters due this week from today to the next 6 days.
Next Week	Will list all contacts/letters due next week from 7 days away to 14 days.
Today	Will list all contacts/letters due today.
Last 3	Will list all contacts/letters due over the Last 3 days (i.e. the weekend + today).
Letters	Will list all letters due today.
Last Month	Will list all contacts/letters due from the start to the end of last month.
This Month	Will list all contacts/letters due this month.
Next Month	Will list all contacts/letters due this next month.
Date Search	Will enable a selection of From and To dates to be manually entered.
Current Salesperson	Will set the salesperson search field to be the current salesperson as selected from the **Menu**. Then when any of the date selection buttons are used, only those selected within the date range that belong to the selected salesperson will be displayed.
All Salespersons	After using the **Current Salesperson** button, this button can be used to select all contacts/letters for all salespersons.
Done	After a selection of contacts/letters have been found, use this button to omit any contacts/letters that have been flagged as **Done**.

Other Options

Add to Outlook — This option will add the selected task to your Outlook tasks thus allowing you to schedule Listpro tasks in Outlook. You need to set up your Profile name and Password in the Salespersons screen first.
The same option is available in the Prospects and Vendors Notes screen using the + button. If the task already exists in Outlook then it will be updated by this action.

End of Year

Each Year in Listpro you should Close the Year for the Salespersons Sales Figures. This can be done at the end of the financial year or the end of the calendar year, depending on what your requirements are.

Some of the considerations in deciding when to close off are personal preference, franchise group reporting or awards or when you started the system.

The following process is the same no matter which close off period you decide.

Preparation

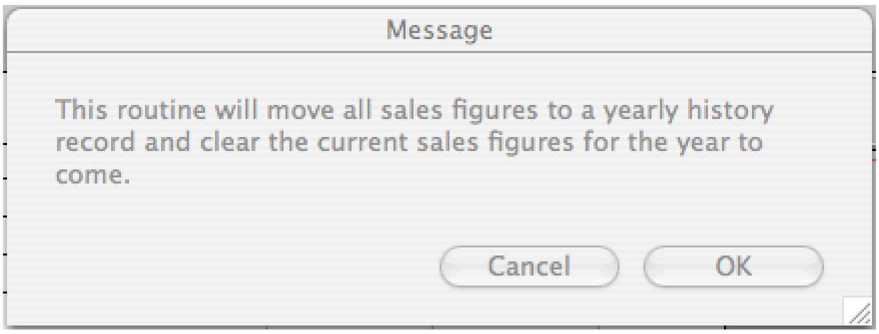
Before closing off the year you should make sure that all sales details for the previous year have been entered and the Update Salespersons Figures has been selected for each of these sales. Note the Updated Yes field underneath the sales figures. This will tell you whether a sale has been updated or not. Do Not Update any figures for the new year until the Close Year has been run. You can enter the details in to produce sales letters and advices, but do not Update Salespersons Figures for this year yet.
Once this has been done, quit out of Listpro and do a Backup of the whole Listpro folder.

Method

From the Main Menu select the Salespersons button. Then in Salespersons select the Current option to display the current years sales figures for each salesperson. Then select Detail to print the Detailed Report, followed by Totals to produce the Summary Report. You can always produce these report later from the History option anyway.
If you have only been using the system for part of the year then the figures will not be complete so do not bee concerned with this. If you have been using Listpro for a full year and the figures are also not complete then you probably have not been using the Update Salespersons Figures option each time a sale exchanges or settles. In this case now is a good time to Close the Year off and start properly for the next year.

Close Year

Select the Close Year Button. This will close a years figures off, creating a history record using the current years figures then clearing all the current figures for all salespersons ready for the next year. When you select this option the following warning will appear;



Select OK to start the process, or Cancel if you are not sure. This will transfer all of the Current year figures to a History record for that year that can be accessed and printed at any time from the History button. each History record will be denoted by the Year that the record was created. The Current sales figures will be cleared ready for the new year.

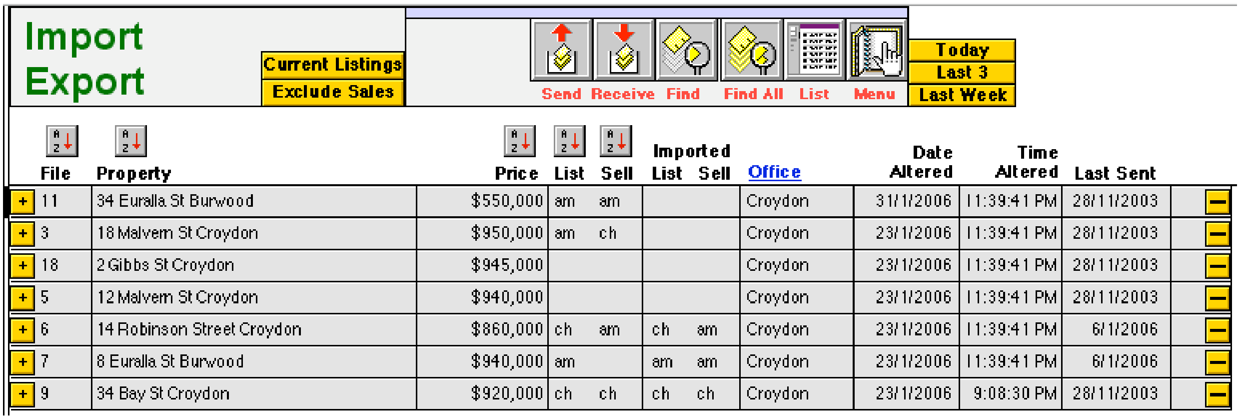
Note

In some versions where the Current Figures show Lists and Sells totals, these totals were not being cleared properly. You may in these cases click on the figures (or tab through them) and delete then manually.

Sending and Receiving Data between multiple offices.

Listpro supports the sending and receiving of Listing updates between related offices. At this point only listings and inspections can be kept synchronized between offices. Each office needs to have a unique record set up in the Agent file with a unique key. Then each salesperson needs to be attached to one of the offices.

From the Listings Menu select the **Import Export** option to display the following screen.



File	Property	Price	List	Sell	Imported List	Imported Sell	Office	Date Altered	Time Altered	Last Sent
11	34 Euralla St Burwood	$550,000	am	am			Croydon	31/1/2006	11:39:41 PM	28/11/2003
3	18 Malvern St Croydon	$950,000	am	ch			Croydon	23/1/2006	11:39:41 PM	28/11/2003
18	2 Gibbs St Croydon	$945,000					Croydon	23/1/2006	11:39:41 PM	28/11/2003
5	12 Malvern St Croydon	$940,000					Croydon	23/1/2006	11:39:41 PM	28/11/2003
6	14 Robinson Street Croydon	$860,000	ch	am	ch	am	Croydon	23/1/2006	11:39:41 PM	6/1/2006
7	8 Euralla St Burwood	$940,000	am		am	am	Croydon	23/1/2006	11:39:41 PM	6/1/2006
9	34 Bay St Croydon	$920,000	ch	ch	ch	ch	Croydon	23/1/2006	9:08:30 PM	28/11/2003

The three search buttons may be used to find any records that have been added or altered **Today**, **Last 3** days or **Last Week**. By clicking on any of these buttons the matching listings will be displayed.

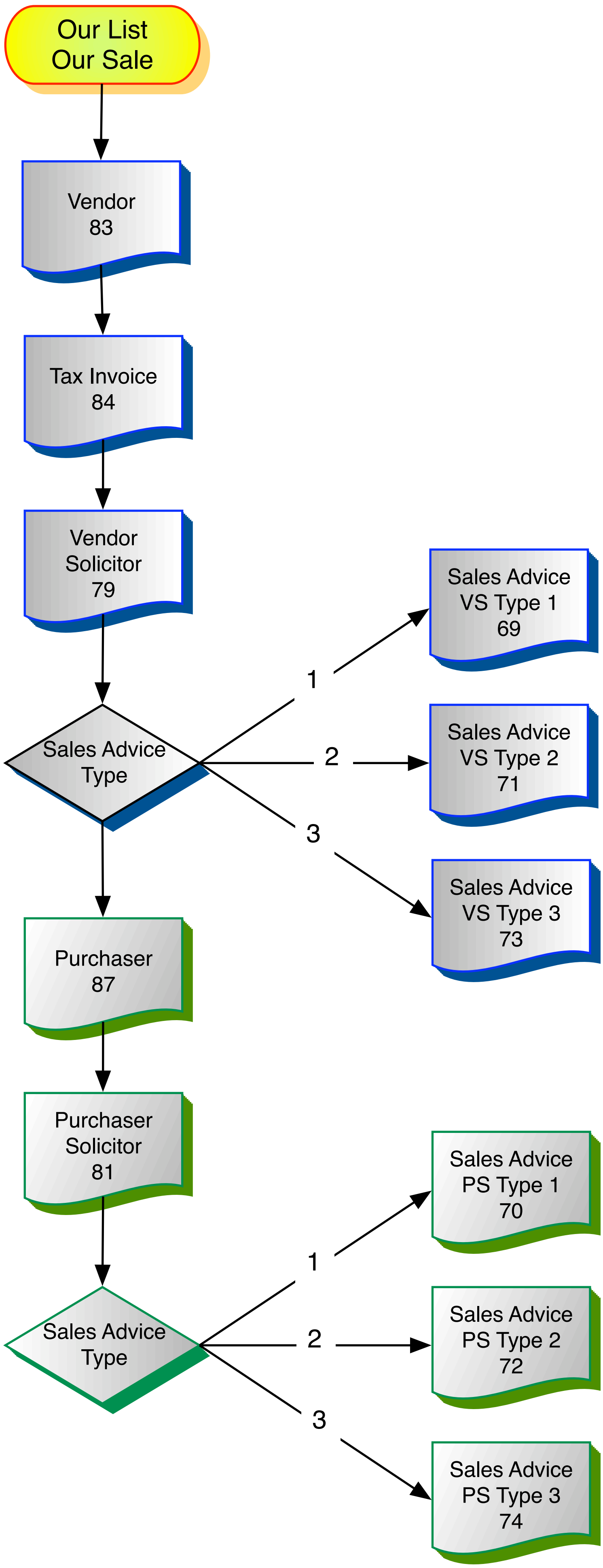
Then use the **Send** button to create an email file of those listings and inspections that will be automatically emailed to the other offices. The Last Sent date will then be updated so the listings do not get included in the next update (unless it has been modified after the last sent date).

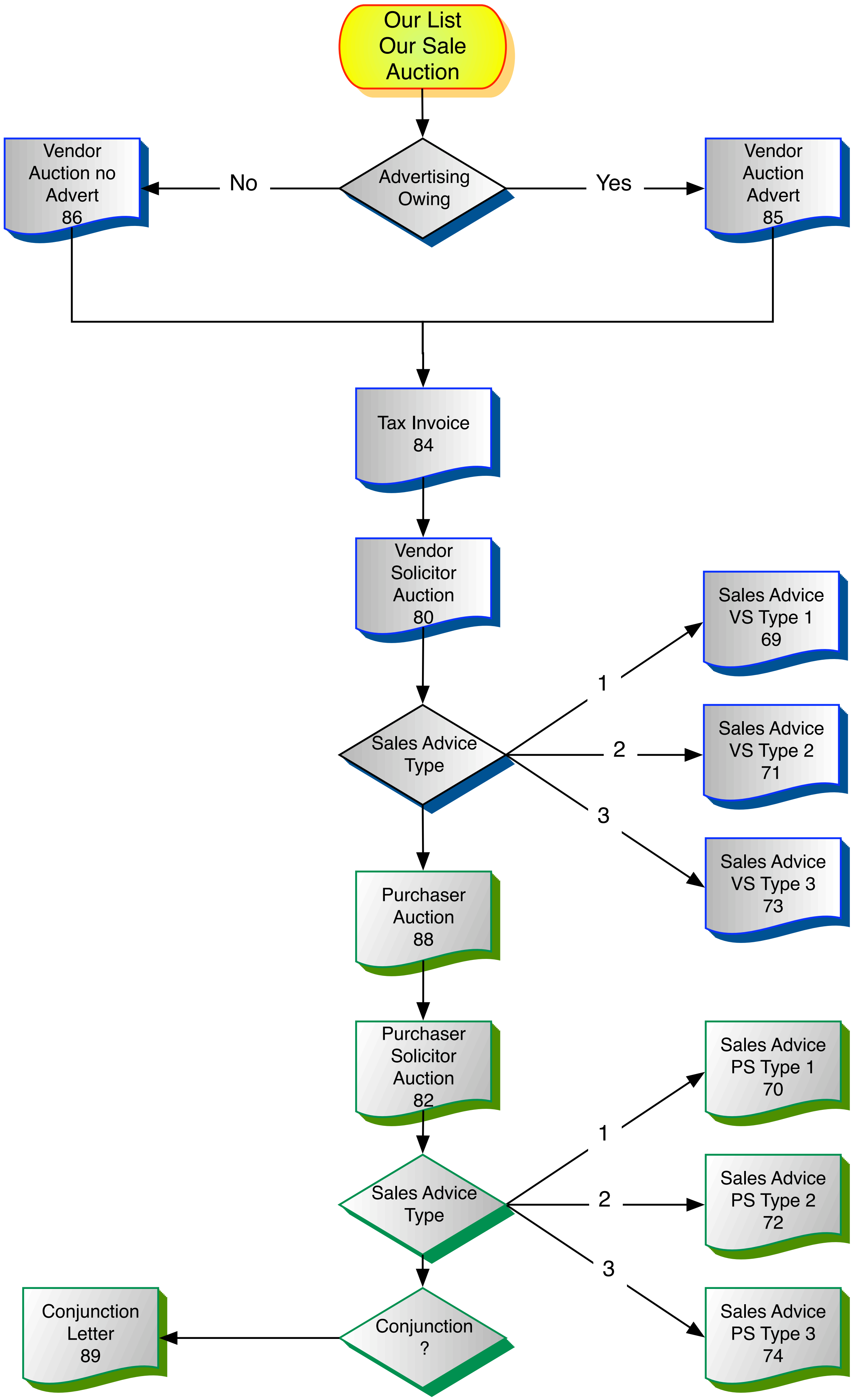
If each office runs this process at the close of business each day, then in the morning the other offices will have emails with attachments that they must save to the desktop. Once this has been done the **Receive** option is used to update the other offices changes. You will be prompted for a file to use for the update so you should select the file that you saved onto the desktop. Repeat this process for each other office.

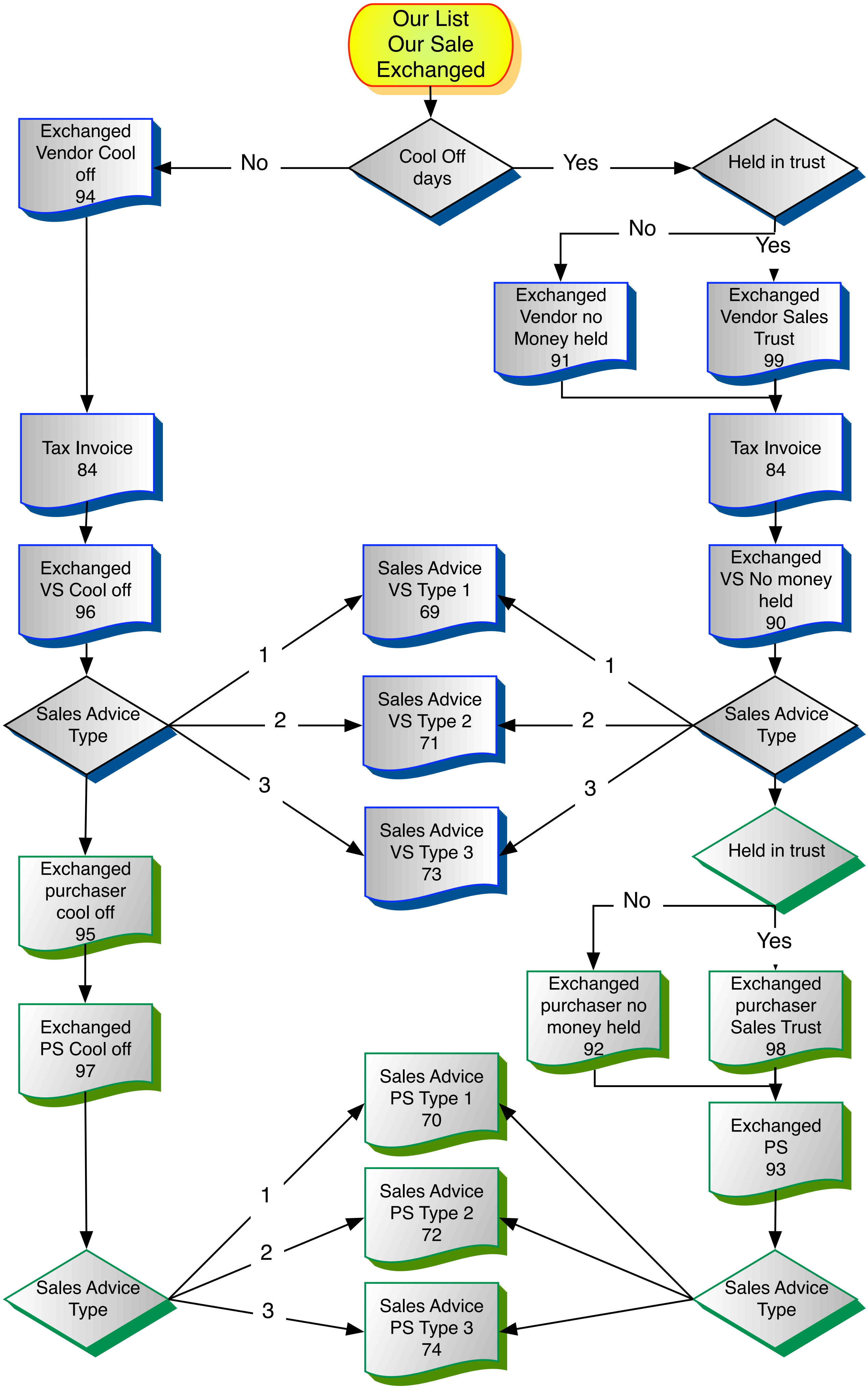
The files that will be sent between offices will be named as follows;
Croydon Listings.fp5, **Croydon Inspects.fp5** where the office name is Croydon. There will be two prompts for files so you must select them in order of Listings.fp5 and then Inspects.fp5.

Appendix A

Listing Letters Flowchart


Our List
Our Sale
Vendor
83
Tax Invoice
84
Vendor
Solicitor
79
Sales Advice
Type
1
2
3
Sales Advice
VS Type 1
69
Sales Advice
VS Type 2
71
Sales Advice
VS Type 3
73
Purchaser
87
Purchaser
Solicitor
81
Sales Advice
Type
1
2
3
Sales Advice
PS Type 1
70
Sales Advice
PS Type 2
72
Sales Advice
PS Type 3
74


Our List
Our Sale
Auction
Advertising
Owing
No
Yes
Vendor
Auction no
Advert
86
Vendor
Auction
Advert
85
Tax Invoice
84
Vendor
Solicitor
Auction
80
Sales Advice
Type
1
2
3
Sales Advice
VS Type 1
69
Sales Advice
VS Type 2
71
Sales Advice
VS Type 3
73
Purchaser
Auction
88
Purchaser
Solicitor
Auction
82
Sales Advice
Type
1
2
3
Sales Advice
PS Type 1
70
Sales Advice
PS Type 2
72
Sales Advice
PS Type 3
74
Conjunction
?
Conjunction
Letter
89



Our List
Our Sale
Exchanged
Cool Off
days
No
Yes
Exchanged
Vendor Cool
off
94
Held in trust
No
Yes
Exchanged
Vendor no
Money held
91
Exchanged
Vendor Sales
Trust
99
Tax Invoice
84
Tax Invoice
84
Exchanged
VS Cool off
96
Exchanged
VS No money
held
90
Sales Advice
VS Type 1
69
Sales Advice
VS Type 2
71
Sales Advice
VS Type 3
73
Sales Advice
Type
Sales Advice
Type
1
2
3
1
2
3
Held in trust
No
Yes
Exchanged
purchaser
cool off
95
Exchanged
purchaser no
money held
92
Exchanged
purchaser
Sales Trust
98
Exchanged
PS Cool off
97
Exchanged
PS
93
Sales Advice
PS Type 1
70
Sales Advice
PS Type 2
72
Sales Advice
PS Type 3
74
1
2
3
Sales Advice
Type
Sales Advice
Type

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