

PROPERTY PLATFORM



User Guide

Welcome to Property Platform

Sales and network management made simple.

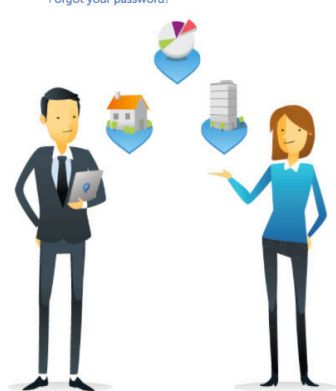
Email *

Password

Keep me signed in

[Sign In](#)

[Forgot your password?](#)



We've prepared this User Guide to help answer some of the common queries we get about how to use Property Platform.

Remember, we're here to help. If you have any further queries, please contact us.

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Getting Started

Setting up Your Account

Once you have signed up to Property Platform, an invitation email will be sent to your nominated email address. Click on the link in the email, and you will be prompted to create an account for your company using your details (1). You will need to provide the following:

- Your First and Last Name
- A Password
- The Company Name
- The Company Address

You can also add additional users to the company account at the bottom of the page. Click the '+' button (2) and provide the email addresses of additional users. You can also do this later if you prefer.

Once you have filled in this section, click 'Accept' (3).

Accessing Property Platform

Once you have signed up, you can access Property Platform at:
<https://propertyplatform.realestate.com.au>

Log in here using your email address and password.

Alternatively, you can create a custom URL for a customised sign in page. This feature will be detailed in the Company Profile section (Page 4).

Welcome to Property Platform
Thank you for accepting your company invitation. Your account is almost ready. Please fill in the details below to activate your account.

Your account

1

Email: developer.john@example.com

* First name: John

* Last name: Developer

Mobile phone: [Field]

providing your mobile phone number will allow us to alert you when a property is reserved

* Password: [Field] (at least 8 characters and 1 number)

* Password confirmation: [Field] (same as password)

Subscriptions: Daily Summary Weekly Summary
We'd like to keep you up to date with changes to projects. Please select whether you (and all additional users) would like to receive a summary of updates by email daily and/or weekly.

Company information

* Company name: Rother Developments

Phone: [Field]

Website: [Field]

* Address line 1: 511 Church Street

Address line 2: [Field]

* City/Suburb: Richmond

* State: VIC

* Post code: 3121

* Country: Australia

Additional users

If there is anyone else in your company that should have access to the system, please enter their details below. You can always add more users at a later time using the Contacts page.

Category	Email *	Name

2

By using Property Platform, you agree to our Privacy Policy, our Terms of Use, and our Personal Information Collection Statement.

Accept 3

Setting up your Company Profile

The screenshot shows the 'Company Profile' setup page for 'Rocher Developments'. The page is divided into several sections: 'General', 'Address', and 'Custom Sign In'. A blue circle with the number '1' highlights the 'Logo' field in the 'General' section. The 'General' section includes fields for Name, Logo, Phone, Primary user, Website, and Description. The 'Address' section includes fields for Address (Line 1), Address (Line 2), City/Suburb, State, Post code, and Country. The 'Custom Sign In' section includes fields for Current URL and New URL, and an 'Update Sign In URL' button. An 'Update Company' button is located at the bottom of the page.

The first thing you will need to do is set up your Company Profile, to personalise Property Platform to your brand.

Click your name in the top right hand corner of the page and select 'Company Profile' from the drop down menu (1). On the following page you can add and/or edit the following:

- Company Name - mandatory field
- Company Logo
- Company Address - mandatory field
- Phone Number
- Primary User
- Website
- Company Description

Note: The logo you upload to the system will be automatically resized to fit.

Setting Up a Custom Sign In URL

To create a custom sign in URL, enter a custom name in the text field next to 'New URL', and click 'Update Sign in URL'.

This will allow you to send a customised URL for sign in to staff members and agents from your sales network, and will also display your logo on the sign in page.

Once you are happy with the changes, click 'Update Company' at the bottom of the page.

Managing your User Profile

To manage your User Profile, click on your name in the top right hand corner of the page and select 'Account' from the drop down menu (1).

Firstly, you will need to enter your current password at the top of each tab's page. Once you have done this, you will be able to make a number of changes to your account by selecting from the tabs at the top of the screen:

Details Tab

In this tab you can change your name and email address, as well as add your contact phone numbers. You can also change the currency type and language for your account by selecting a new language and/or currency from the drop down. Click 'Submit' to confirm.

Password Tab

If you need to change your password, enter your new password in the password tab and confirm. Click 'Submit' to change your password.

API Tokens Tab

You can also access your account by generating an API token, in the 'API Tokens' tab, and use this to authenticate against the API instead of a password. Click 'Create a new API token' and the system will generate this for you, as well as provide log in information. You can also delete an API by clicking the 'Delete' button.

PROPERTYPLATFORM Search Property Platform John Developer

ROCHER DEVELOPMENTS

John Developer

Details Password API Tokens

Your details

* Current password 1

We need your current password to confirm your changes.

* Email

* First name

* Last name

Currency

Language

Main phone

Mobile phone

providing your mobile phone number will allow us to alert you when a property is reserved

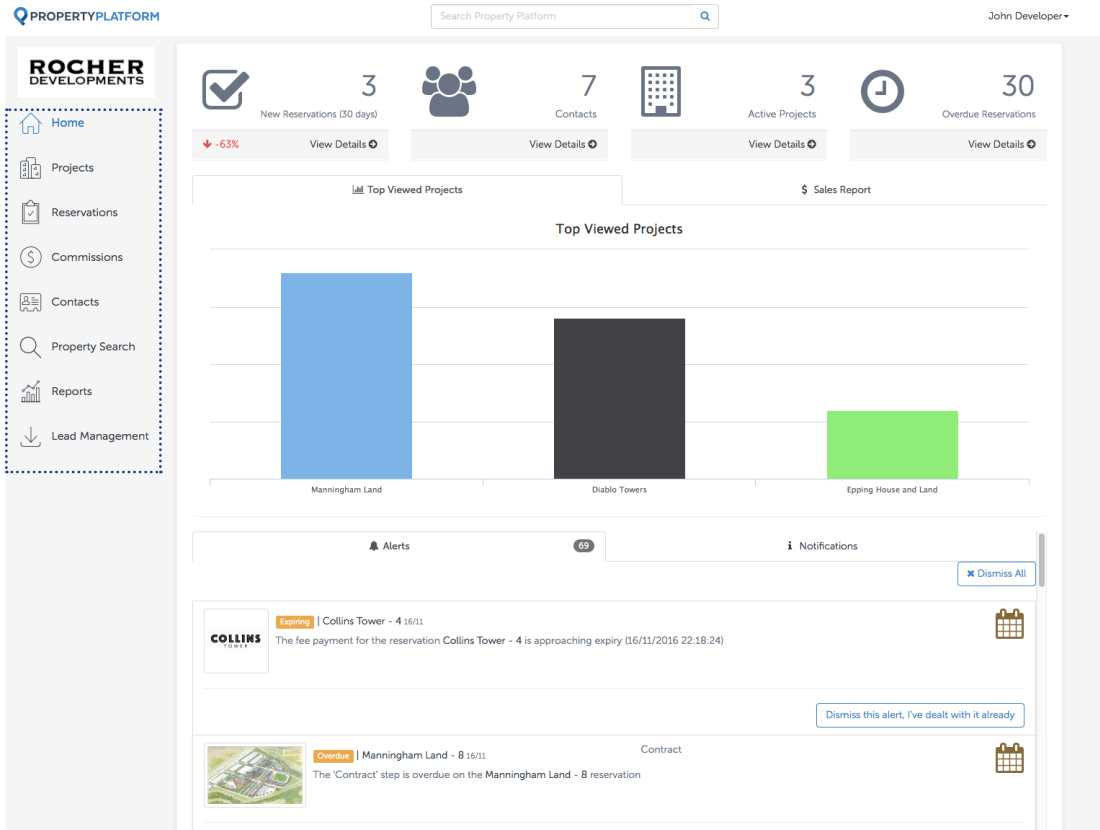
Recent sign-in history

	Time	Time of last activity	Location
180	18/11/2016 16:46:44 Current	18/11/2016 16:54:35	203.17.253.249 (web)
179	18/11/2016 14:37:40	18/11/2016 14:37:40	203.17.253.249 (api)
178	18/11/2016 10:45:26	18/11/2016 16:43:59	203.17.253.249 (web)
177	17/11/2016 15:28:12	17/11/2016 17:53:25	112.196.26.66 (web)
176	17/11/2016 14:08:56	17/11/2016 14:19:12	203.17.253.249 (web)
175	17/11/2016 11:30:49	17/11/2016 11:30:49	203.17.253.249 (api)
174	17/11/2016 11:03:13	17/11/2016 13:18:37	203.17.253.249 (web)
173	17/11/2016 10:48:18	17/11/2016 11:02:33	203.17.253.249 (web)
172	17/11/2016 10:43:03	17/11/2016 10:43:04	203.17.253.249 (api)
171	17/11/2016 00:34:31	17/11/2016 00:34:32	47.90.23.41 (api)

Sign Out Terms of Use Privacy

PROPERTYPLATFORM RSA Group

Navigation



Use the menu on the left hand side to navigate around Property Platform, and perform different actions:

Projects

Create and view projects that you have access to, and edit and delete projects that you own.

Reservations

View all reservations for projects you own or for properties that you have sold on other projects.

Commissions

Set and edit commissions to be paid or that will be paid on reserved properties.

Contacts

Manage access to your company account for your staff, and access to your projects for your sales networks. In this section you can also create campaigns.

Property Search

View properties within your account based on different filters.

Reports

Access and generate reports on your projects, sales and commissions.

Leads Management

Centralise the management of your leads, assign them to your sales team and keep track of your sales funnel.

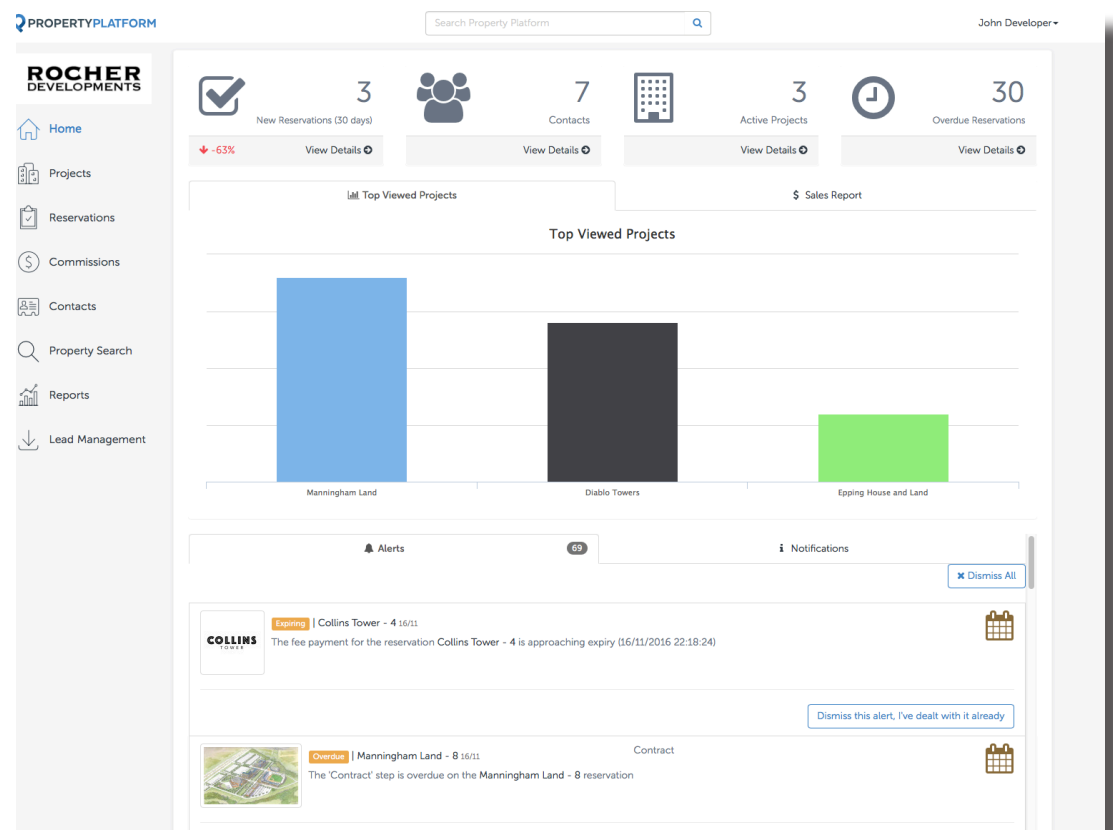
Section Overview: Home

At a glance, this information provides an account overview and highlights actions to take when you log in to Property Platform. This includes:

- **New Reservations** - The number of new reservations that have been made in the last 30 days
- **Number of Contacts** - The number of people who have access to your projects
- **Number of Active Projects** - The number of projects that are currently active in your account
- **Number of Overdue Reservations** - The number of reservation payments with an overdue status
- **Top Viewed Projects** - A graph ranking projects by number of views
- **Sales Reporting** - A graph overviewing the sales per project
- **Alerts** - Highlights the key actions to be addressed
- **Notifications** - Summarises activity on your projects, such as reservations or project updates

To get more detail on any section, you can click on the 'View Details' link within its box.

Note: You will only be able to see detailed information on projects that you own, or reservations that you have made.



Section Overview: Projects

The screenshot displays the 'PROPERTYPLATFORM' interface for the 'ROCHER DEVELOPMENTS' user. The main content area shows a list of projects. At the top, there are filter and sort options: 'Project type' (All), 'View' (Published projects), 'Sort' (By name (A-Z)), and a 'Find' search field. The projects listed are:

- Diablo Towers**: 8 King Street, Melbourne, Victoria 3000. Properties Available: 34/70. Status: New Apartment. Metrics: 34 Available, 13 Reserved, 12 Contracts, 11 Sold.
- Epping House and Land**: 53 McDonalds Rd, Epping, VIC 3076. Properties Available: 22/40. Status: New House & Land. Metrics: 22 Available, 5 Reserved, 5 Contracts, 8 Sold.
- Manningham Land**: Galloway Drive, Mernda, Victoria 3754. Properties Available: 14/30. Status: New Land. Metrics: 14 Available, 8 Reserved, 4 Contracts, 4 Sold.

Each project card includes a 'View Pricelist' and 'View Details' link. A utility cog icon is present in the top right of each card's overview section.

The Projects section provides a summary of projects that you have access to, including projects that you own and projects that have been distributed to your account.

You can filter and sort your projects by using the options at the top of the page to view based on the project status, date, and ownership (1). You can also search for specific projects using the Find field.

Each project has an overview of its details, and if you own the project will also have information about the number of properties available, reserved and sold.

If you own the project, you can use the arrows on the right hand side of the project overview to view a breakdown of reservations by buyer type (Investors, Owner Occupiers) and FIRB status. If you do not own the project, this will not be visible.

In the right hand corner of each project overview is a utility cog. Clicking this gives you options to edit the project, add new properties, import a price list and assign access (2).

Note: If you do not own the project you will not be able to edit, import, add properties, or view project history and reservations.

Creating a New Project

To create a new project, click the 'Create Project' button on the top left hand side of the 'Projects' section.

You will first be prompted to select if this is an Apartment or House & Land project. After this has been selected, provide information in the following sections:

General Tab (1)

- Project Name - the name of the project
- Subheading - A key message to appear on the summary page
- Project Description - A summary of the project
- Project Address - The full project address

Once you have filled this in, click 'Save and Continue'. This will bring you to the 'Edit project' section.

Details Tab (2)

Click on the Details Tab (4) to add more comprehensive information about the project, including:

- Video URL - A YouTube or Vimeo link to a project video
- Carpark Value - The estimated value of a single car space
- Estimated Completion and Construction Start Dates
- Reservation and Project Information - Simple check box options for key project information
- Sunset Clause - The number of days applicable to the sunset clause
- Total Units or Land Lots
- Number of Levels
- Builder - The builder of the project
- Vendor - The entity bound to the reservation agreement

Fill in the applicable information and click the 'Reservations' tab to continue (3).

The screenshot shows the 'New Development' form in the 'General' tab. The form is divided into two main sections: 'Project details' and 'Location details'. The 'Project details' section includes fields for 'Project name *' (filled with 'Eureka Tower'), 'Subheading', and 'Project Description' (with a placeholder text: 'include any special project features, assuming this will be visible to buyers'). The 'Location details' section includes fields for 'Address 1 *' (filled with '123 Example St'), 'Address 2', 'City *' (filled with 'Docklands'), 'State *' (filled with 'Victoria'), 'Postcode *' (filled with '3008'), and 'Country *' (filled with 'Australia'). A 'Save and continue' button is located at the bottom right of the form. A blue circle with the number '1' is overlaid on the 'Project name' field.

The screenshot shows the 'New Development' form in the 'Details' tab. The form is divided into two main sections: 'General' and 'Details'. The 'Details' section includes fields for 'Video URL' (filled with 'https://www.youtube.com/watch?v=uQB7QRyF4p4'), 'Carpark value' (with a placeholder text: 'estimated value of a single car space'), 'Est. Completion' (with 'Year' and 'Month' dropdowns), and 'Est. Const. Start' (with 'Year' and 'Month' dropdowns). The 'General' section includes fields for 'Sunset Clause' (filled with '36 months, November 2015'), 'Total Units', 'Number of Levels', 'Builder', and 'Vendor'. There are also checkboxes for 'Gym?', 'Pool?', 'Allow FIRB', and 'Bank Guarantees'. A 'Save changes' button is located at the bottom right of the form. A blue circle with the number '2' is overlaid on the 'Video URL' field, and a blue circle with the number '3' is overlaid on the 'Details' tab header.

Creating a New Project

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Search Property Platform

John Developer

ROCHER DEVELOPMENTS

Projects > fff > Edit

General Details **Reservations** Documents Images Publish

Select your method of accepting reservations

Require payment
All reservations will require a credit card verification (can optionally be skipped by you on a per-reservation basis)

Manually approve all reservations
All reservations will need to be manually approved

Automatic reservation cancellation
Enabling this will automatically cancel unpaid reservations after the Reservation fee period has elapsed, and set the property status to Available.

Reservation fee
\$ 1000 .00
the reservation fee to be paid (if required)

Reservation fee period
48
time (hrs) until the fee should be paid

Reservation instructions

use **bold**, *italic*, or read the **cheat sheet** Agents will see these instructions at the time of reservation.

Default commission percentage
%
The default commission percentage for this project, per commission payment.

Default commission fixed amount
\$
The default fixed amount of commission for this project, per commission payment.

Contract due
The default number of days for contracts to be exchanged after fee payment (blank = 7 days)

Deposit due
The default number of days the deposit will be due after the contract exchange (blank = 7 days)

Settlement due
The default number of days after the construction completion date that settlement will be due (blank = 30 days for apartments and 6 months for H&L)

Save changes

Reservations Tab

In the Reservations Tab, you can set the method for accepting reservations and the commission rules for the project. You must include the following:

- The reservation method - specify whether you require payment (if so, you will need to specify the fee), whether you will manually approve all reservations, and whether there be automatic cancellation after a set time period (1)
- Reservation Instructions - Information that agents will see at the time of reservation (2)
- Default Commission Percentage or Fixed Amount (3)
- Contract Due - The default number of days for contracts to be exchanged after fee payment. If left blank, this will be 7 days (4)
- Deposit Due - The default number of days the deposit will be due after the contract exchange. If left blank, this will be 7 days (5)
- Settlement Due - The default number of days after construction completion date that settlement will be due. If left blank, for apartment projects this will be set at 30 days, and for house and land projects this will be set at 6 months (6).

Once you have set up the reservation and commission rules, click the 'Documents' tab to continue.

Creating a New Project

Documents Tab

Use the Documents tab to upload files that can be viewed by those with access to the project. To upload, drop files directly into the browser and select 'Upload' to attach (1).

Once you have uploaded your project documents, you can change their order by clicking to reorder on the left hand side. Next to this, you can also update the document name, and tag them to make documents easy to find. Add tags by typing in a title for each, and separating with a comma.

To delete a document, select the 'Delete' next to the document name. You can also hide a document's visibility by sliding the visibility status from 'Show' to 'Hide'.

Images Tab

Add project images by dragging and dropping them into the upload section from your computer and clicking 'Upload' (2).

Once you have uploaded project images, you can click to change their order, and update their descriptions for the image gallery.

Note: Images that you upload to the project will also appear for each individual property within the project, unless nominated otherwise when uploading properties.

Once you have uploaded project images, click on the 'Publish' tab to continue.

The image displays two screenshots of the Property Platform interface, illustrating the process of creating a new project.

Top Screenshot (Documents Tab): This screenshot shows the 'Documents' tab selected. A large dashed box with an upload icon and a blue circle containing the number '1' indicates the upload area. Below this, a table lists uploaded documents. The table has columns for 'Modified', 'Document name (defaults to a file name)', 'Delete', 'Tags', and 'Show / Hide'. The documents listed are:

Modified	Document name (defaults to a file name)	Delete	Tags	Show / Hide
21/11/2016	brochure.pdf	Delete	x Brochure	Show Hide
21/11/2016	contract.pdf	Delete	x Contract	Show Hide
21/11/2016	floorplan_1.pdf	Delete	x Floor Plan x P1	Show Hide
21/11/2016	floorplan_10.pdf	Delete	x Floor Plan x P10	Show Hide
21/11/2016	floorplan_11.pdf	Delete	x Floor Plan x P11	Show Hide
21/11/2016	floorplan_12.pdf	Delete	x Floor Plan x P12	Show Hide
21/11/2016	floorplan_13.pdf	Delete	x Floor Plan x P13	Show Hide
21/11/2016	floorplan_14.pdf	Delete	x Floor Plan x P14	Show Hide
21/11/2016	floorplan_15.pdf	Delete	x Floor Plan x P15	Show Hide

Bottom Screenshot (Images Tab): This screenshot shows the 'Images' tab selected. A large dashed box with an upload icon and a blue circle containing the number '2' indicates the upload area. Below this, a table lists uploaded images. The table has columns for 'Description to be shown in the image gallery (For example: 'City view from the rooftop')', 'Delete', and 'Loading'. The image listed is:

Description to be shown in the image gallery (For example: 'City view from the rooftop')	Delete	Loading
image1.jpg	Delete	Loading

Creating a New Project

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Projects > fff > Edit

General Details Reservations Documents Images **Publish**

No properties available
There are currently no available properties in your project. Please add at least one property here before publishing.

Project Status

- Draft**
Draft projects will be visible to your company and any allocated agents. However, only users in your company can make reservations on this project.
- Published**
Published projects are visible and reservable by all allocated agents. You will be asked to select a payment option when publishing a project.
- Archived**
Archived projects will only be visible within your company and cannot be reserved.

Save changes

1

PROPERTYPLATFORM Search Property Platform John Developer

New Create project

Project type View Sort Find

All Published projects By name (A-Z) Start typing project name

Collins Tower
123 Clarendon St, South Melbourne, VIC 3001
Properties Available: 11/45

Added 1 day ago
Est. Cons. Start Q4 2016
Est. Completion Q2 2017
Distance to city 2.26km
Reservation fee \$1,000
Approval required No
Networks with Access 3

11 Available
8 Contracts
View Pricelist >

Diablo Towers
8 King Street, Melbourne, Victoria 3000
Properties Available: 22/70

Added 1 day ago
Est. Cons. Start Q4 2016
Est. Completion Q2 2017
Distance to city 0.84km
Reservation fee \$1,000
Approval required No
Networks with Access 3

22 Available
14 Contracts
View Pricelist >

23 Reserved
11 Sold
View Details >

2

- Edit Project
- Import Pricelist
- Add new property
- Networks Access
- Staff Access
- Project History
- Reservation History
- Delete
- Show/Hide

Publish Tab

The Publish tab has the following options:

- Draft - Makes the project visible to your company and allocated agents, but only users in your company can make reservations
- Published - Makes the project visible and properties within the project reservable by allocated agents
- Archived - Makes the project visible only within your company, and properties within the project unable to be reserved

You must add properties to a project before publishing, so select 'Draft' for your new project, and click 'Save Changes'

Once you have added properties, come back to this tab and select 'Published' as the project status, clicking 'Save Changes' (1).

Note: To publish a project, you will need to select a payment option before continuing.

Editing and Deleting a Project

Once the project is created, it can be edited by accessing the utility cog (2) in the Project Overview screen, and selecting 'Edit Project'. To delete a project, click on 'Delete' from the menu instead.

Creating a New Project

Before publishing a project, you must add properties for sale within it. This can be done in two ways:

- Adding individual properties manually, or
- Adding multiple properties by uploading a pricelist

Adding Individual Properties Manually

To add individual properties manually, click on the project utility cog and select 'Add new property' (1).

You will then need to fill in information about the individual property in the following tabs (2):

- General - Provide overview information about the property. You must include the lot/unit number, property type, level, price, number of bedrooms, bathrooms and car spaces, and can provide additional information if required.
- Financials - Provide the property's financial information. You must provide information about NRAS in this section, and can also include information about stamp duty, dutiable amount, and estimated rent and rates.
- Size - Specify the property size, including internal, external and total area.
- Images - Upload a cover image and select images from the project images for the property. Upload a cover image by clicking 'choose file' and selecting a photo. Then specify which images you want to appear from the project by checking the box next to each image listed.

Once done, click 'Create Property' to finalise.

The image shows two screenshots of the Property Platform interface. The top screenshot displays the 'Collins Tower' project page with a utility menu open, highlighting the 'Add new property' option (1). The bottom screenshot shows the 'Add new property' form for the 'Collins Tower' project, with the 'General' tab selected and the 'Number' field highlighted (2).

Collins Tower Project Details:

- Address: 123 Clarendon St, South Melbourne, VIC 3001
- Properties Available: 11/45
- Added: 1 day ago
- Est. Cons. Start: Q4 2016
- Est. Completion: Q2 2017
- Distance to city: 2.26km
- Reservation fee: \$1,000
- Approval required: No
- Networks with Access: 3
- 11 Available
- 8 Contracts

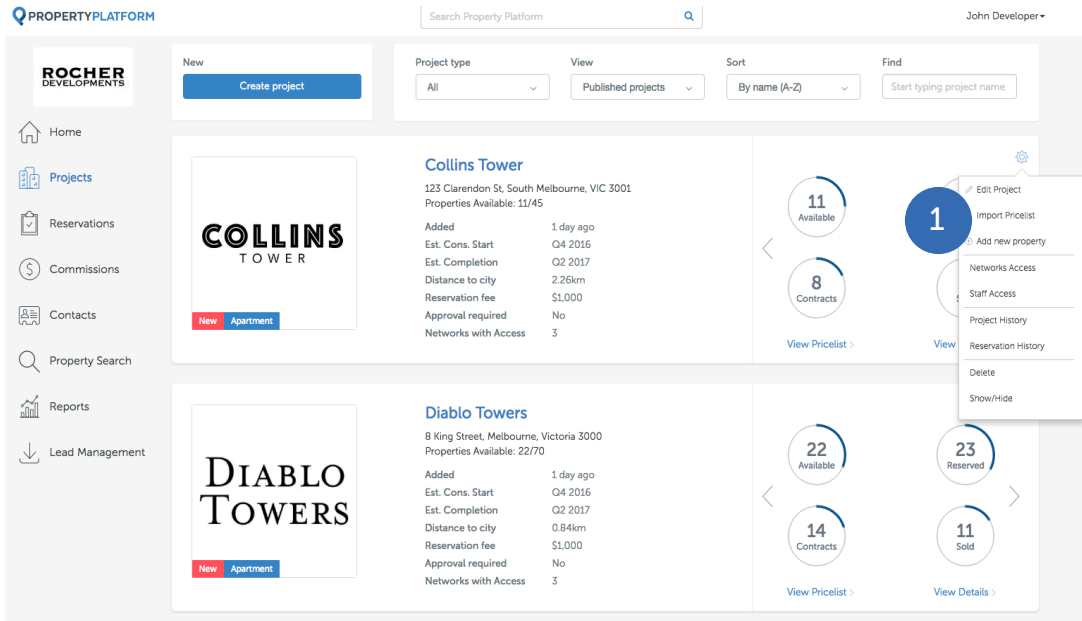
Diablo Towers Project Details:

- Address: 8 King Street, Melbourne, Victoria 3000
- Properties Available: 22/70
- Added: 1 day ago
- Est. Cons. Start: Q4 2016
- Est. Completion: Q2 2017
- Distance to city: 0.84km
- Reservation fee: \$1,000
- Approval required: No
- Networks with Access: 3
- 22 Available
- 14 Contracts
- 23 Reserved
- 11 Sold

Add new property Form Fields:

- * Number (e.g. lot/unit number; this must be unique)
- Level: 1
- Car lot
- Storage lot
- * Price: \$.00
- Beds: 1
- Baths: 1
- Cars: 0
- Study
- Storage
- Aspect
- Floorplan type
- Create Property

Adding Properties



Adding Properties via a Pricelist

Adding properties via a pricelist allows you to add multiple properties to a project at once by using an Excel spreadsheet. To begin, select 'Import Pricelist' from the Project's utility cog menu (1).

1. Fill in an Excel spreadsheet with the following headers, or request a blank template from your Account Manager (2):

- Number - Unit/Lot number of the property
- Status - The status of the property: inactive, held, available, reserved, under contract, sold, settled
- Level - The level that the property is on (if it is house and land this is the number of storeys)
- Beds - Number of bedrooms in the property (studio apartment is '0')
- Baths - The number of bathrooms
- Cars - The number of carspaces
- Internal Area (m²) - Internal area of the property in metres squared
- External Area (m²) - External area of the property in metres squared
- Total Area (m²) - The total area of the property in metres squared
- Price - The price of the property in dollars
- Aspect - The way the property faces. Please use the first letter of the aspect to denote what it is i.e. 'N' for north, 'E' for east etc.
- Owners Corp Rates - The rates per year
- Water Rates - The estimated water rates per year
- Council Rates - The estimated council rates per year
- Estimated Total Rates - The estimated total value of rates per year
- Estimated Rent - The estimated weekly rent. This can be a single figure (i.e. \$400) or a range (i.e. \$400-\$500) to indicate the min/max rent
- Storage - answer as either Yes/No or 1/0
- Study - answer as either Yes/No or 1/0
- Car Lot Number - The corresponding car lot number
- Storage Lot Number - The storage lot number
- Stamp Duty - The cost of stamp duty on the property

Number	Status	Level	Beds	Baths	Cars	Internal Area	External Area	Total Area	Price
1	Under contract	1	2	2	2	12			
2	Reserved	1	2	2	2	80			
3	Sold	2	2	2	2	100			
4	Available	3	2	2	2	120			

Adding Properties

Adding Properties via a Pricelist (Continued)

2. Once you have filled in the spreadsheet with the properties, copy the entire contents of the spreadsheet (including the header row) and paste it into the text box on the 'Import Price List' page, and click 'Next' (1).

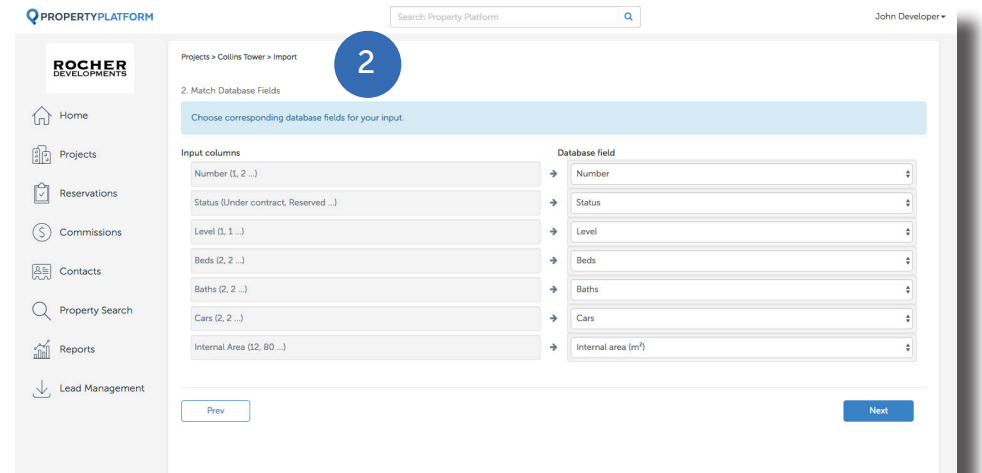
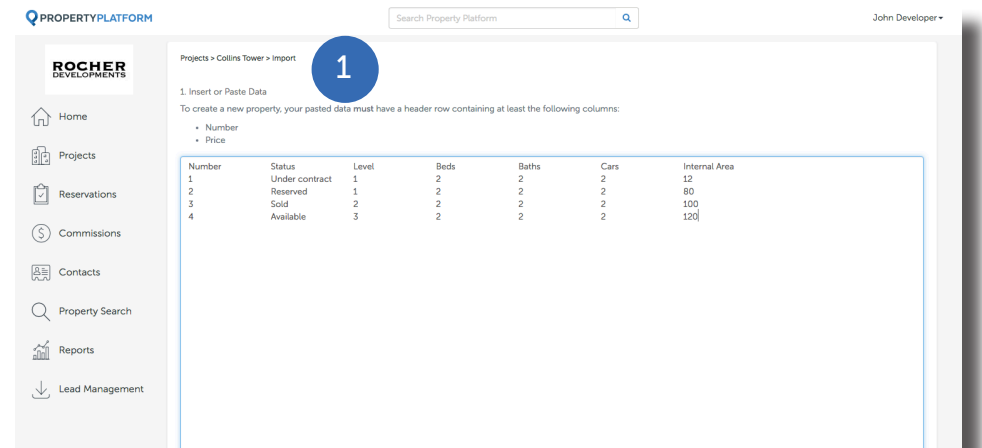
Note: If you do not want to import/update a column, hide it in Excel before copying.

3. On the following screen, you can review how the system has matched your data to relevant fields (2). Check whether this has been matched correctly, and update the column matching if required by utilising the drop downs. Click 'Next' to continue.

4. The final screen allows you to preview your properties and highlights any errors in the upload. After reviewing, click 'Import' to add the properties.

Editing Properties Using the Pricelist

You can also update properties using the same feature. Using the same lot/unit number for the property you want to edit, enter the information you want to change into the spreadsheet. Follow the above steps and the system will update the property with the matching lot/unit number.



Project Overview

The screenshot displays the 'Diablo Towers' project summary page on the Property Platform. The page is titled 'DIABLO TOWERS' and features a navigation menu on the left with options like Home, Projects, Reservations, Commissions, Contacts, Property Search, Reports, and Lead Management. The main content area includes a large heading '1' and 'DIABLO TOWERS', a map of Melbourne, and a detailed list of project specifications and statistics.

Diablo Towers
ABSOLUTE WATERFRONT LIVING
8 King Street, Melbourne, Victoria 3000
Properties Available: 34/70

Statistics:
34 Available, 13 Reserved, 12 Contracts, 11 Sold

Key Features:
Designed by multi award winning architect known globally for leading designs.
Waterfront living
Spacious Apartments
Sky Garden
Low running costs
Dream Investment!

View Pricelist

Added	11 days ago
Est. Cons. Start	Q4 2016
Est. Completion	Q2 2017
Sunset Clause	60
Builder	Jim Hall
Total Units	70
Number of Levels	4
Gym	yes
Pool	yes
Vendor	Rocher Developments Pty. Ltd.
Reservation fee	\$1,000
Approval required	No
Networks with Access	3
Project setup status	90%

Once a project has been published, view the Project Summary Page by clicking on it in the Projects Overview screen. This details all project information across four tabs:

Summary Tab

The Summary tab provides an overview, project images, and an interactive location map (1).

Documents Tab

In the Documents tab, you can access project downloads. To view or download any document, click on 'Preview' or 'Download' next to its title.

Documents can also be sorted to find them easily. You can use the document tags to find groups of documents with the same tag by clicking on the relevant tag. You can also sort the documents by using the tabs above the documents list, or search by typing into the search bar.

Project Overview

Price List

The Price List shows all properties available within the project, and summaries, availability and price. This will show all properties when you own the project, and only those allocated and reserved properties for agents.

Properties can be filtered and searched based on what is available, and on their features, such as number of bedrooms and price (1).

You can also download the Price List as a PDF or Spreadsheet by selecting relevant properties using the check box next to the lot/unit number and clicking the relevant button.

To get more details about a property, click on it, and the view will expand to provide more information.

Editing or Deleting a Property

To edit or delete a property, click on the property to expand it, then click on the utility cog on the right-hand side and select 'Edit' or 'Delete'.

The screenshot displays the 'PROPERTYPLATFORM' interface for the 'Diablo Towers Apartment' project. The 'Price List' tab is selected, and a red circle with the number '1' highlights the 'Price list' tab. The interface includes a search bar, a navigation sidebar with options like Home, Projects, Reservations, Commissions, Contacts, Property Search, Reports, and Lead Management, and a main content area with filters and a table of 13 properties.

Number	Details	Size (m ²)	Agent	Status	Price	Floorplan
1	2b 1 1	Int : 60.0 Ext : 12.0 Total : 72.0	Jeff Agent Pty Ltd	Reserved	\$450,000	[Floorplan]
2	3b 2 2	Int : 80.0 Ext : 16.0 Total : 96.0		Available	\$600,000	[Floorplan]
3	1b 1 1	Int : 40.0 Ext : 8.0 Total : 48.0	Jeff Agent Pty Ltd	Reserved	\$300,000	[Floorplan]
4	2b 1 1	Int : 60.0 Ext : 12.0 Total : 72.0		Available	\$450,000	[Floorplan]
5	3b 2 2	Int : 80.0 Ext : 15.0 Total : 95.0	Mary Agent Pty Ltd	Under contract	\$600,000	[Floorplan]
6	1b 1 1	Int : 40.0 Ext : 8.0 Total : 48.0		Available	\$300,000	[Floorplan]
7	2b 1 1	Int : 60.0 Ext : 11.0 Total : 71.0		Available	\$450,000	[Floorplan]
8	3b 2 2	Int : 80.0 Ext : 14.0 Total : 94.0		Available	\$600,000	[Floorplan]
9	1b 1 1	Int : 40.0 Ext : 7.0 Total : 47.0	Mary Agent Pty Ltd	Sold	\$300,000	[Floorplan]
10	2b 1 1	Int : 60.0 Ext : 10.0 Total : 70.0	Mary Agent Pty Ltd	Sold	\$450,000	[Floorplan]
11	3b 2 2	Int : 80.0 Ext : 14.0 Total : 94.0	John Agent Pty Ltd	Reserved	\$600,000	[Floorplan]
12	1b 1 1	Int : 40.0 Ext : 7.0 Total : 47.0	Mary Agent Pty Ltd	Reserved	\$300,000	[Floorplan]
13	2b 1 1	Int : 60.0 Ext : 10.0 Total : 70.0	Jeff Agent Pty Ltd	Under contract	\$450,000	[Floorplan]

Making a Reservation

Anyone with access to reserve properties within a project can reserve a property from the Price List screen in real time, and pay the reservation fee if required.

To make a reservation, click on the property to expand the details. Click the 'Reserve' button and fill in the buyer details (you must include the buyer's first and last name, and their email address) on the following screen. Click 'Reserve Now' to continue (1).

The next screen is the Payment screen, where the reservation fee can be paid, if required. Firstly, enter the method of payment verification, and the payment due date (2). You can then choose to pay on the spot by clicking 'Verify now' or send the payment notice via email for the customer to pay later (3).

You can also add any additional comments associated with the reservation (4). Once you have done this, click 'Save Updates' to continue.

Reserving Diablo Towers - 4

Diablo Towers
4 / 9 South Road, Southview, Victoria 3982

Sale price: \$450,000
Reservation fee: \$1,000
Approval required: No

Buyer details

Buyer is an investor Buyer requires FBI approval

Buyer email * john.doe@example.com Company name
First name * John Last name * Doe

Line 1
123 Example Street

Line 2

City/Suburb Melbourne Postcode 3000
State VIC Country Australia

Phone

Comment
Require contracts delivered ASAP

Reserve on behalf of...
John Developer

Reserve now 1

Payment - Diablo Towers - 29

Approval status: Approved

Payment verification type: Credit card 2

Payment verification due date: 12/06/2016
This reservation will be cancelled if the credit card is not verified by this date

Process your credit card verification of \$1,000 3

Verify now or Email customer

Accepted cards for credit card verification and sub notice charges.
This reservation will be cancelled if the credit card is not verified by 12/06/2016

VISA Mastercard AMERICAN EXPRESS

ADDITIONAL COMMENTS 4

Enter additional notes - this will appear in your notes associated to this listing

Save updates

Making a Reservation

If the customer wants to verify the payment now, the next screen is where you verify the credit card for the reservation payment. This fee confirms the reservation and avoids cancellation. It is held until the contract step has been completed, or the reservation is cancelled, at which point it will be automatically returned to the customer's account.

To verify the reservation fee, fill in the name on the card, credit card number, expiry date and CVN (1). The customer must then read the summary and read and accept the terms and conditions by ticking the check box (2).

Next, click 'Verify Now' to process the payment immediately, or click 'Process Later' to do this at a later stage (3). Clicking 'Verify Now' will put a hold on the reservation fee.

Once the payment has been verified, a window will appear confirming the reservation (4), and you can download the receipt (5). Select 'Done' to complete the reservation.

The screenshot shows a credit card verification form for 'Diablo Towers - 29'. The form includes a fee due of \$1,000 and a warning that the reservation may be cancelled if the fee is not paid on time. The form fields are: Name on card (John Smith), Credit card number (1111222233334444), Expiry date (10/19), and CVN (123). The form also lists the parties involved: Rocher Developments Pty Ltd (vendor), Rocher Developments (offering company), and Rocher Developments (agent). The purchaser is John Smith, 511 Church St, Richmond, Victoria 3121. The property is Diablo Towers, 29 / 8 South Road, Southview, Victoria 3924. The price is \$600,000, the reservation fee is \$1,000, and the expiry date is 19/06/2016. The form has a checkbox for 'I have read and agree with the terms & conditions' and two buttons: 'Verify now' and 'Process later'. A 'Property Reserved' overlay window shows a green message: 'Congratulations! Your payment was successful. Please print out and save a copy of the receipt in a safe place.' and a red 'Download Receipt' link. The overlay also states: 'You can access your receipt from the Payment stage on the Reservations page.' and has a 'Done' button.

1 Name on card * John Smith

2 I have read and agree with the terms & conditions

3 Verify now Process later

4 Property Reserved

5 Download Receipt

Project Overview

The screenshot displays the 'PROPERTYPLATFORM' interface. On the left is a navigation sidebar with icons for Home, Projects, Reservations, Commissions, Contacts, Property Search, Reports, and Lead Management. The main content area shows the breadcrumb 'Projects > Diablo Towers' and a sub-tab 'Apartment'. Below this are four tabs: Summary, Documents, Price list, and Reservations (which is active). A table lists reservation data with columns for Lot, Date, and Agent.

Lot	Date	Agent
54	11/08/2016	Jeff Agent Pty Ltd
55	17/06/2016	John Agent Pty Ltd
53	14/06/2016	Mary Agent Pty Ltd
24	15/04/2016	Jeff Agent Pty Ltd
2	13/04/2016	John Agent Pty Ltd
24	12/07/2016	Mary Agent Pty Ltd
13	24/01/2016	Jeff Agent Pty Ltd
59	16/06/2016	John Agent Pty Ltd
10	10/09/2016	Mary Agent Pty Ltd
35	18/07/2016	Jeff Agent Pty Ltd
16	19/07/2016	John Agent Pty Ltd
9	06/12/2015	Mary Agent Pty Ltd
36	05/09/2016	Jeff Agent Pty Ltd
11	13/11/2015	John Agent Pty Ltd
57	15/02/2016	Mary Agent Pty Ltd
3	18/06/2016	Jeff Agent Pty Ltd
41	04/01/2016	Jeff Agent Pty Ltd
18	30/08/2016	John Agent Pty Ltd
60	21/12/2015	Mary Agent Pty Ltd

Reservations Tab

The Reservations tab summarises the reservation history for the project. You can view reservations by properties, date, agent and reservation status by clicking on the name of any column.

Section Overview: Reservations

The screenshot shows the 'Reservations > Diablo Towers > 54 > Active' page. A sidebar on the left contains navigation links: Home, Projects, Reservations (highlighted), Commissions, Contacts, Property Search, Reports, and Lead Management. The main content area has a 'Details' tab selected, with a blue circle containing the number '1' next to the 'Reservation Details' section. Below this, there is a table of reservation events:

Event	Date	Status
Reservation Details	11/09/2016	Complete
Pay Reservation Fee	12/08/2016	Complete
Contract	13/08/2016	Complete
Refund	13/08/2016	Complete
Pay Deposit	23/11/2016	In Progress

Below the table, there are input fields for 'Deposit due date' (23/11/2016), 'Date deposit paid' (DD/MM/YYYY), 'Deposit amount' (\$ 30000 .00), and 'Deposit type'. There is also an 'Additional comments' section with a text area and an 'Attach document (Optional)' section with a 'Choose File' button. A 'Save updates' button is at the bottom. The footer includes 'Sign Out', 'Terms of Use', 'Privacy', and logos for 'PROPERTYPLATFORM' and 'REA Group'.

The Reservations section overviews current reservations and the stage the reservation is at. A summary of your accounts reservations is provided below the sort function, highlighting the number of overdue payments, the number awaiting payment and the number of reservations pending approval (1).

Below this, there is a list of each reservation showing its reservation stage and highlighting the next required action. Actions that can be managed are:

- **Approvals** - Approve the reservation of a property (if reservations are set to require approval)
- **Fee Payments** - Pay fees that are due on each reservation (if reservations require payments)
- **Noting a Contract** - Record a contract being signed and attach the signed contract if required
- **Actioning a Fee Refund** - Record that the initial reservation fee has been refunded
- **Capturing deposit** - Record when a deposit has been paid
- **Cancellations** - Cancel a reservation
- **Transfers** - Move a reservation to another property

You can filter and sort the list to view reservations by their reservation status and project status, or use the search bar to find a specific reservation. You can also export the reservations list into a spreadsheet by clicking 'Export Spreadsheet'+.

Section Overview: Reservations

Contract - Diablo Towers - 29

Contract due date: 17/05/2016

Date contract exchanged: 20/06/2016

Inclusions/Special conditions:

Type*	Description	Value
Window furnishings	Enter additional notes	\$ 5000

Additional comments

Enter additional notes - this will appear in your notes associated to this listings.

Attach document (Optional):
Choose File | No file chosen

Save updates

Refund - Diablo Towers - 29

Refund due date: 22/06/2016

Refund date: 10/06/2016

Additional comments

Enter additional notes - this will appear in your notes associated to this listings.

Attach document (Optional):
Choose File | No file chosen

Save updates

Cancelling a Reservation

Cancelling a reservation will make the property available for reservation by others. To do this, select the utility cog next to the reservation you want to cancel, and click 'Cancel reservation'.

Noting Signing of a Contract

To note receiving a signed contract, click 'Attach' in the contract section of the applicable reservation. A window will appear prompting you to enter in the date the contract was exchanged, any special conditions or inclusions (along with their value), and any additional comments (1). You can also attach the contract, if required, by clicking the 'Choose file' button and selecting the contract file from your computer (2). Click 'Save Updates' to finalise.

Record a Refund

To record a refund, select 'Refund' in the refund section (5). In the pop up window, fill in the refund date, additional comments, and attach any required documentation (3). Once completed, click 'Save Updates'.

Note: If the payment was made via Credit Card in Property Platform, this will be automatically refunded when the 'Contract' stage is completed.

Section Overview: Reservations

Recording a Deposit

To record receiving a deposit, select 'Process' in the deposit section of the relevant reservation. In the pop up window, add the 'Date deposit paid', and fill in the deposit amount and type, along with any additional comments (1). Finally, add relevant documentation by clicking 'Choose File' and uploading the file from your computer (2). Click 'Save Updates' to continue.

Once you have completed these steps for a property, the reservation summary will show that each section is completed, so you can easily determine which reservations are completed.

Deposit - Diablo Towers - 29

Deposit due date: 27/06/2016

Date deposit paid: 30/06/2015

Deposit amount: \$ 60000.00

Deposit type: Cash / EFT / Cheque

Additional comments

Enter additional notes - this will appear in your notes associated to this listings.

Attach documents (Optional):
Choose File chosen

Save updates

Section Overview: Reservations

The screenshot shows the 'Reservations' section of the Property Platform. It features a sidebar with navigation options like Home, Projects, Reservations, Commissions, Contacts, Property Search, Reports, and Lead Management. The main content area displays a table of reservation details for 'Diablo Towers' properties. The table has columns for Reservation status, Project status, Sort, and Find. Below the table, there are buttons for 'Export Spreadsheet' and 'View/Edit' for each reservation row.

Reservation status	Project status	Sort	Find
Current	Published projects	Most recent	Start typing property details

For all your published projects
Overdue (26) Awaiting Payment (0) Pending Approval (0)

Export Spreadsheet

Reservation details	Reservation stage	Details	Payment	Contract	Refund	Deposit
Property: Diablo Towers - 25 Sale price: \$400,000 Agent: Jeff Agent Pty Ltd Purchaser: Mark Buyer Updates	Completed: 07/11/2016 View/Edit	Completed: 30/09/2016 Verify	Completed: 02/10/2016 Attach	Completed: 02/10/2016 Refund	Due: 23/11/2016 Process	
Property: Diablo Towers - 62 Sale price: \$600,000 Agent: Mary Agent Pty Ltd Purchaser: Mark Buyer Updates	Completed: 07/11/2016 View/Edit	Completed: 30/09/2016 Verify	Overdue: 16/11/2016 Attach	Due: 18/11/2016 Refund	Due: 23/11/2016 Process	
Property: Diablo Towers - 36 Sale price: \$300,000 Agent: Jeff Agent Pty Ltd Purchaser: Mark Buyer Updates	Completed: 07/11/2016 View/Edit	Completed: 06/09/2016 Verify	Overdue: 16/11/2016 Attach	Due: 18/11/2016 Refund	Due: 23/11/2016 Process	
Property: Diablo Towers - 5 Sale price: \$600,000 Agent: Mary Agent Pty Ltd Purchaser: Mark Buyer Updates	Completed: 07/11/2016 View/Edit	Completed: 03/09/2016 Verify	Completed: 04/09/2016 Attach	Completed: 04/09/2016 Refund	Due: 23/11/2016 Process	

Editing the Buyer or Agent on a Reservation

To edit the agent on any reservation, click the agent name. This will bring up a window showing the agent information. Click 'Edit' to bring up a drop down menu where you can change the company for the reservation (1). Click 'Save New Agent' to complete the change.

The 'Select New Agent' dialog box is shown. It has a title bar with 'Close' and a blue circle with the number '1' next to it. The main content area has a label 'Reserve on behalf of...' followed by a dropdown menu currently showing 'Agent Pty Ltd'. Below the dropdown is a 'Save New Agent' button.

To edit the buyer click on the buyer name on the applicable reservation to and click 'Edit' in the summary window (3). This will then bring up a pop up where you can edit the buyer information by filling in the relevant fields. Click 'Update' when you have finished making the changes (2).

The 'Edit Buyer Information' dialog box is shown. It has a title bar with 'Close' and a blue circle with the number '2' next to it. The form is titled 'Buyer details' and contains the following fields:

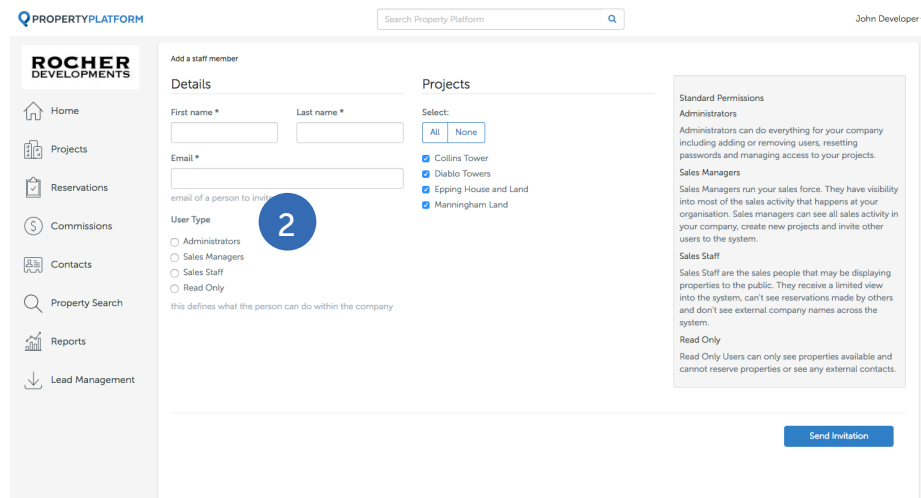
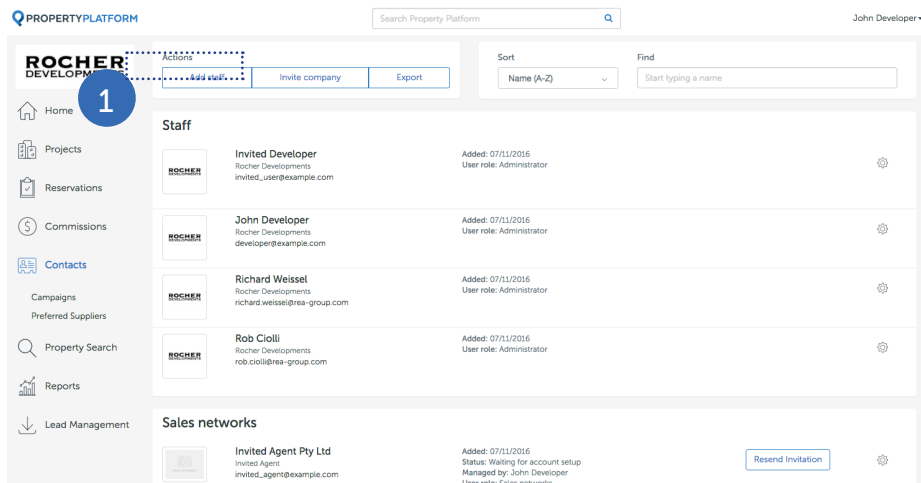
- Buyer type: Resident
- Company name: (empty)
- * First name: Sam
- * Last name: Smith
- * Buyer Email: sam@best.com
- Phone: (empty)
- Buyer is an investor
- Buyer requires FRB approval

The 'Address' section contains:

- Line 1: 123 Example St
- Line 2: (empty)
- City/Suburb: Melbourne
- Postcode: 3121
- State: Vic
- Country: Australia

An 'Update' button is located at the bottom right of the form.

Section Overview: Contacts



The Contacts section overviews Staff members (users within your company) and Sales Networks (companies you have invited to access your projects). From this section you can add contacts, manage access, edit users details and export your list.

Add New Staff Members

From this section give staff members from your company access and set their access level, to limit actions they can take. There are four levels:

- **Admin** - Can add and manage Staff Members and Sales Networks, passwords and access levels, manage project access, and add or edit projects
- **Sales Manager** - Have visibility into sales activities, the ability to create projects and invite other users
- **Sales Staff** - Have visibility across properties and projects they have access to, not reservations made by others or members of external companies. They can reserve properties assigned to them, but cannot create or edit projects
- **Read Only** - Can only see properties available, and have no ability to reserve properties, or see external contacts

To add a staff member, click the 'Add staff' button (1), which will bring up a new screen. Fill in their name and email address and select the user type based on the access they require (2). Next, select the projects they can access - either checking the tick box next to the project, or selecting 'All' or 'None'. Click the 'Add' button when you have filled this in.

Once you have done this, the staff member will receive an email prompting them to set up their account.

Section Overview: Contacts

Invite a Company

Inviting a company allows you to add your sales channels, and manage their access across different projects.

To add a company, click 'Invite Company' in the main Contacts page (1). This will then bring up a window with three tabs to fill in:

General

In the General tab, fill in the company name and main email address, and optional information such as the company's website, address, phone and main contact. You can also add multiple users by adding a list of email addresses, separated by commas, in the 'Additional Users' section (2). Once completed, select the Projects tab to continue.

Projects

In the Projects tab, you can set which projects across your published, archived, sold out and exclusive projects the company will have access to. You must have at least one project selected to invite a company.

To do this, check the box next to the projects you want the company to have access to in each section (3). You can also select the tick underneath each section to select all, or the cross to select none. Click the Settings tab to continue.

The screenshot shows the 'General' tab of the 'Invite Company' form. The form is titled 'Contacts > Add sales network to contacts' and has three tabs: 'General', 'Projects', and 'Settings'. The 'General' tab is active. The form contains several input fields: 'Company name *', 'Email *', 'Phone', 'Website', 'First name', 'Last name', 'Address (Line 1)', 'Address (Line 2)', 'City/Suburb', 'State', 'Post code', 'Country' (with a dropdown menu set to 'Australia'), and 'Message'. There is also an 'Additional users' section with a text area containing 'john.doe@example.com, karen.koe@example.com'. A blue circle with the number '1' is placed over the 'Company name' field, and a blue circle with the number '2' is placed over the 'Additional users' text area. An 'Invite' button is at the bottom.

The screenshot shows the 'Projects' tab of the 'Invite Company' form. The form is titled 'Contacts > Add sales network to contacts' and has three tabs: 'General', 'Projects', and 'Settings'. The 'Projects' tab is active. The form is divided into four sections: 'Published Projects', 'Archived/Sold Out Projects', 'Draft Projects', and 'Exclusive Projects'. Each section has a dropdown menu with a checkmark and an 'x' icon. Below the 'Published Projects' section, there are three checkboxes: 'Diablo Towers', 'Epping House and Land', and 'Manningham Land'. Below the 'Draft Projects' section, there is one checkbox: 'Collins Tower'. Below the 'Exclusive Projects' section, there is no checkbox. A blue circle with the number '3' is placed over the 'Published Projects' dropdown menu. An 'Invite' button is at the bottom.

Section Overview: Contacts

PROPERTYPLATFORM

Search Property Platform

John Developer

ROCHER DEVELOPMENTS

Contacts > Add sales network to contacts

General Projects Settings

Email Settings 1

Subscriptions

Daily Summary

Weekly Summary

suggest which notifications the new user/s will receive

Reservation Settings These settings only apply to projects you own

Skip fee payment

Always skip reservation fee payments for this contact

Automatically approve reservations

Applicable only for projects with reservation type of Offline

Allow approving reservations

Trust this agent with the approval of the reservations on your behalf

Commission Settings

Default commission percentage %

A default percentage (per instalment) for sales made by this contact

Default commission fixed amount \$

A default commission amount (per instalment) for sales made by this contact

Invite

Settings

In the Settings tab, you can set how members of the company can interact with your projects. Firstly, select whether they will receive daily or weekly updates on projects by clicking the relevant check box (1).

Next, in the 'Reservations' section, you can set rules to apply to the company's reservations by selecting the tick box next to the following options (2):

- **Skip Fee Payment** - If selected, the company's agents will not need to make the reservation fee payment on reservations
- **Automatically Approve Reservations** - If selected, reservations made by the company's agents will be automatically approved (even if you have set a project to require manual approval)
- **Allow Approving Reservations** - If selected, the company's agents will also have the ability to approve reservations for allocated projects on your behalf

Next, set commission rules for the company in the 'Commission Settings' section (3):

- **Default Commission Percentage** - percentage per instalment for sales made by the company
- **Default Commission Fixed Amount** - commission amount per instalment for sales made by the company

Once this section is complete, click 'Invite' (4). The company and email addresses you entered for company members will be sent a welcome emailing prompting them to create an account. Once they have done this they will then be able to invite their own sales channels to Property Platform.

Section Overview: Contacts

Once you have added contacts to your account, you can manage these contacts from the Contacts section.

To export your list of contacts into an excel spreadsheet, click the 'Export' button on the main page (1).

If a contact has not yet created an account, you can also resend their invitation by clicking 'Resend Invitation' next to a contact that hasn't accepted (2). You can also change the details of any contact by selecting the utility cog next to the relevant contact (3).

The screenshot shows the 'PROPERTYPLATFORM' interface. At the top, there is a search bar and a user profile 'John Developer'. Below this is a navigation menu on the left with options like Home, Projects, Reservations, Commissions, Contacts, Campaigns, Preferred Suppliers, Property Search, Reports, and Lead Management. The main content area is titled 'Staff' and contains a table of contacts. The table has columns for contact details, dates, and user roles. Three callouts are present: '1' points to the 'Export' button in the 'Actions' bar; '2' points to the 'Resend Invitation' button next to 'Invited Agent Pty Ltd'; and '3' points to the settings cog icon next to 'Invited Developer'. Below the 'Staff' section is a 'Sales networks' section with two entries: 'Invited Agent Pty Ltd' and 'Jeff Agent Pty Ltd'.

Staff	Added:	User role:
Invited Developer Rocher Developments invited_user@example.com	07/11/2016	Administrator
John Developer Rocher Developments developer@example.com	07/11/2016	Administrator
Richard Weissel Rocher Developments richard.weissel@rea-group.com	07/11/2016	Administrator
Rob Ciolli Rocher Developments rob.ciolli@rea-group.com	07/11/2016	Administrator

Sales networks	Added:	Status:	Managed by:	User role:
Invited Agent Pty Ltd Invited Agent invited_agent@example.com	07/11/2016	Waiting for account setup	John Developer	Sales networks
Jeff Agent Pty Ltd Jeff Agent	07/11/2016	Reservations: 54		

Section Overview: Campaigns

The screenshot shows the Property Platform interface. On the left sidebar, the 'Campaigns' option is highlighted with a blue circle and the number '1'. In the top right corner, the 'Create Campaign' button is highlighted with a blue circle and the number '2'. The main content area displays a table of campaigns:

Created at	Subject	Status	Created by	Statistics
17/11/2016 11:43:57	New poolandsajkfhdsajgh	Pending	John Developer	Opened: 0%, Clicked: 0%
15/11/2016 15:07:28	test	Sent	John Developer	Opened: 100%, Clicked: 0%
07/11/2016 11:24:11	New Project coming soon	Pending	John Developer	Opened: 0%, Clicked: 0%

The screenshot shows the 'New Campaign' form. At the top, there is an 'About Campaigns' section with a blue background and white text. Below this, there are several input fields: 'Subject', 'Recipients' (with 'Email groups' and 'Custom emails' sub-sections), and 'Projects'. The 'Add project' button is highlighted with a blue circle and the number '3'. At the bottom right, the 'Preview' button is highlighted with a blue circle and the number '4'. There is also a 'Save Draft' button at the bottom left.

Campaigns

The Campaigns section within the Contacts tab allows you to communicate important updates about a project to anyone via an email campaign. You choose who receives the email: pre-defined groups of companies, individual companies or a custom email list.

To send an email campaign, select 'Campaigns' on the left hand side under 'Contacts' (1) and click 'Create Campaign' (2) in the top right hand corner.

To set up a campaign, you will firstly need to provide:

- **Subject** - The title to appear as the email header
- **Recipients** - Select who will receive the campaign: the names of companies in your sales channels, and/or additional email addresses

Next, in the Projects section, you can edit the content of the campaign. Firstly, nominate the project that the campaign relates to (3). You then need to create content for the campaign in the 'Content' section. You can use the tabs above this to populate the content with the brochure, pricing, details, description and address from the project details.

Once your content is ready, you can preview the campaign before sending by clicking the 'Preview' button (4). You can also send a test email by entering an email address and clicking 'Send Test'

To send the campaign, click 'Send Now'

Section Overview: Commissions

Please Note that the Commissions tab will only appear for admin users

The Commissions tab allows account admins to track incoming and outgoing commissions for properties that have been reserved across projects. You can overview current commissions on the main screen in the listing table. Commissions can also be created for any reserved property, and their status tracked within this tab.

Creating a Commission

1. Click the 'Create Commission' button (1). From here, choose the property the commission is being paid on from the drop down list.
2. Select whether it is a payable (outgoing) or receivable (incoming) (2).
3. Specify whether this commission is a percentage of a sale or a fixed amount, and the value (3).
4. Set the invoice and due dates to trigger alerts. A commission is defaulted to be tracked over 2 payments, but this can be changed by clicking the '+' (to add another payment date) or 'X' (to remove a date) in the Transaction area (4).
5. Fill in the commission due dates for this transaction, the amount due each time, and the paid date, along with any reference.
6. To finalise, click 'Create Commission'.

This commission will then appear in the listing table on the main screen. The listing table can be filtered by status in the left hand menu.

The image displays two screenshots of the Property Platform interface. The top screenshot shows the 'Commissions' tab with a table of commissions. A blue circle with the number '1' highlights the 'Create Commission' button. The table has columns for Created, Reservation, Sale price, Creditor/Debtor, Total Amount, Amount, Invoice Date, Paid Date, and Comments. The bottom screenshot shows the 'Create Commission' form. A blue circle with the number '2' highlights the 'Payable' and 'Receivable' options. A blue circle with the number '3' highlights the 'Percentage from sale' and 'Fixed amount' input fields. A blue circle with the number '4' highlights the 'Paid Date' input field in the 'Transactions' table. The 'Transactions' table has columns for Amount*, Due Date*, Invoice Date, Paid Date, and Reference. The 'Create Commission' button is at the bottom of the form.

Section Overview: Property Search

The Property Search Tab allows you to search projects you have access to for available properties.

There are basic search filters at the top of the page that you can use to find properties across projects, including: project type, number of bedrooms or bathrooms and price (1). You can also search using the 'Advanced Search' filters by clicking to expand (2).

The results are grouped by project name and into properties with similar attributes. To look at a particular listing, click on the number of available properties or click 'view all properties' in the search results.

Once you have set the filters, the system will retain the search criteria when you return to the Property Search Tab.

PROPERTYPLATFORM Search Property Platform John Developer

ROCHER DEVELOPMENTS

Property Search

Project type: Any | Min. Beds: Any | Max. Beds: Any | Bathrooms: Any | Min. Price: Any | Max. Price: Any

Advanced Search

Map | Export Spreadsheet

COLLINS TOWER 123 Clarendon St, South Melbourne, VIC 3001

	1b	1	1	Int (m ²)	Ext (m ²)	\$
8 available properties	1b	1	1	40.0	5.0-8.0	\$300,000
7 available properties	2b	1	1	60.0	7.0-12.0	\$450,000
7 available properties	3b	2	2	80.0	9.0-15.0	\$600,000

View all 22 properties

DIABLO TOWERS 8 King Street, Melbourne, Victoria 3000

	1b	1	1	Int (m ²)	Ext (m ²)	\$
10 available properties	1b	1	1	40.0	5.0-8.0	\$300,000
11 available properties	2b	1	1	60.0	7.0-12.0	\$450,000
13 available properties	3b	2	2	80.0	9.0-16.0	\$600,000

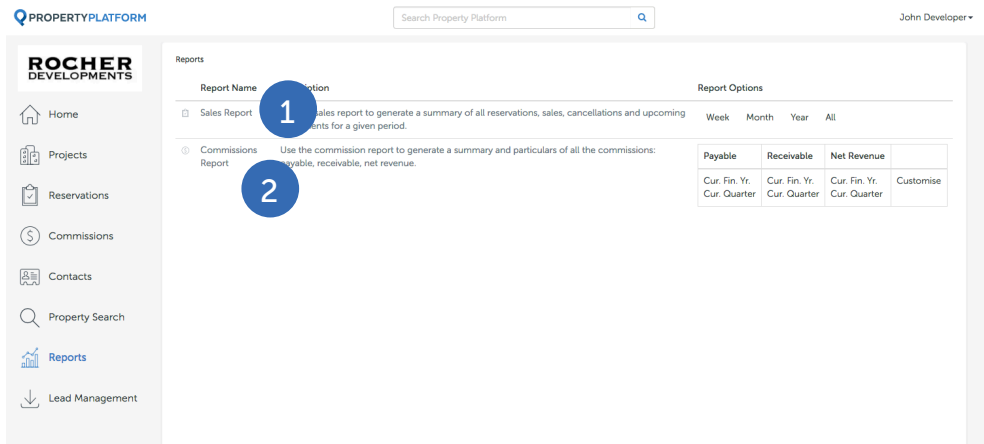
View all 34 properties

Epping House and Land 53 McDonalds Rd, Epping, VIC 3076

	2b/ss	1	1	Land (m ²)	House (m ²)	\$
9 available properties	2b/ss	1	1	410.0-470.0	225.0-277.0	\$390,000-\$480,000
7 available properties	3b/ss	2	2	500.0-590.0	305.0-395.0	\$530,000-\$690,000
5 available properties	4b/ss	2-3	3	600.0-660.0	402.0-468.0	\$700,000-\$815,000
1 available property	5b/ss	3	4	690.0	503.0	\$880,000

View all 22 properties

Section Overview: Reports



Please Note that the Reports Tab will only appear for admin users and sales managers.

The Reports Tab gives you access to Sales and Commissions Reports for the company. These reports can be customised based on time frames and can also be printed to a PDF format within this tab.

Sales Report

The Sales Report lists reservations, cancellations and activity by agents. To access the Sales Report, go to the 'Sales Report' section and select a length of time: week, month, year, all, or a custom date range (1). The report can be further customised by accessing the options in the utility cog on the report screen.

Commission Report

The Commission Report (2) gives a snap shot of all incoming and outgoing commissions. To access this, go to the 'Commission Report' section and select whether you want a Payable, Receivable, Net Revenue or customised report. Click on the corresponding date range under this section to run the report.

Section Overview: Leads Management

The Leads Management section in Property Platform can help you centralise leads management and manage your operations more effectively.

Within this section, you can centrally view leads whether they arrive from realestate.com.au, your own website or any other lead source and assign them across your sales team. You can also add comments, feedback and score leads.

Within the 'Activity' tab (1), you can view all your leads stored in the system. This includes recent leads that have been added, unrated leads, unqualified leads and leads that are 'slipping away' and need action take to help convert to sales (2).

Within the second tab 'Filter' (3), you can filter leads based on projects you're managing, sales people, status, rating or advertising channel.

With the final tab 'Add lead', you can add leads within the system to keep growing your prospective buyer database.

The image displays two screenshots of the Property Platform interface, specifically the Leads Management section for ROCHER DEVELOPMENTS. The top screenshot shows the 'Activity' tab (1) with a summary of lead counts: 958 Total leads, 174 Recent leads, 24 Unrated leads, 123 Need qualifying, and 48 Slipping away. Below this is a table of leads with columns for Name, Email, Contact number, Sales person, and Date. The bottom screenshot shows the 'Filter' tab (3) with various filter options: Interested project, Status, Rating, Advertising channel, and Sales person. The 'Add Lead' tab (4) is also visible.

Name	Email	Contact number	Sales person	Date
Kathleen Bailey	kbailey15@de.vu	0450 442 506	John Developer	11 Nov 2016
Anne Clark	aclark3x@time.com	0435 330 657	John Developer	11 Nov 2016
Mary Payne	mpayne6p@stumbleupon.com	0471 831 643	John Developer	11 Nov 2016
Frank Jenkins	fjenkins9h@ox.ac.uk	0484 499 832	John Developer	11 Nov 2016
Katherine Phillips	kphillips9@unc.edu	0428 804 721	John Developer	11 Nov 2016
Gerald Allen	gallen7s@cbslocal.com	0435 927 478	John Developer	11 Nov 2016
Rachel Hughes	rhughesht@marketwatch.com	0477 788 991	John Developer	11 Nov 2016
Juan Sanchez	jsanchezkl@mapy.cz	0479 555 624	John Developer	11 Nov 2016