

Agency Manager Professional
Software Manual

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Navigation Pane



Agency Manager has been built to comply with normal Windows environment. In order to view the different screens, simply click on the required screen button from the **Navigation Pane** on the left of the Agency Manager Application Screen.

There are screen buttons for Applicants, Properties, Diary, Contacts, Viewings Book and Sales Pipeline in order to allow you to move between the different screens easily.

Simply Click on the button for the screen you wish to view.

Management Console

Using the Management Console, you can configure Agency Manager with all Company Details, Bank Details, User Information, Settings, etc.

Click on the Start button

Select Programs

Point to Agency Manager Professional > Select 'Agency Manager Management Console'

You will be asked to log in to the database - use your usual log in details

You can Configure:

[Company Details](#)

[Company Bank Details](#)

Settings: [VAT Rate](#) & [Currency Setting](#)

[Database Users](#)

[Backup Database](#)

[Revive Archived Records](#)

[Web Portal Uploader](#)

Company Details

The Company Details section has been created so that you don't have to enter your Company details manually every time you run a template. The information you enter here, will be used to populate fields that have been set up in the templates. For example, rather than typing in your VAT Registration Number every time you print a statement, the information entered here will be automatically entered into the statement at the correct position.

Select **Start > Programs > Agency Manager Professional > Agency Manager Management Console**

Select **Company Details** from the left pane

Enter all relevant information such as Company Name, Address, Phone details, eMail Addresses, VAT Registration Number, etc in the right pane

Click on 'Update Company Information'

The screenshot shows a web-based form titled 'Company Details'. It contains several input fields for company information. At the bottom right of the form is a button labeled 'Update Company Information' with a green arrow icon.

Company Name	ForSaleToRent
Branch	Esher
Address One	93 High Street
Address Two	
City	Esher
County	Surrey
Postcode	KT10 9QD
Telephone	01372 470740
Fax	01372 466 006
General Email Address	info@forsaletoRent.co.uk
Web Site	http://www.forsaletoRent.co.uk
Company Registration Number	12345678
Vat Registration Number	VAT12345

Company Bank Details

The Company Bank Details section has been created so that you don't have to enter your Company bank details manually every time you run a template. The information you enter here, will be used to populate fields that have been set up in the templates. For example, rather than typing in your Bank name and branch every time you print a statement, the information entered here will be automatically entered into the statement at the correct position.

- Select **Start > Programs > Agency Manager Professional > Agency Manager Management Console**
- Select **Banking Details** from the left pane
- Enter all relevant information such as Bank Name, Address, Phone details, eMail Addresses, Account Names, Account Numbers, etc in the right pane
- Click on 'Update Banking Information'

The screenshot shows a form titled "Banking Details" with the following fields and values:

Bank Name	Natwest
Branch Name	Surbiton
Address One	High Street
Address Two	
City	Surbiton
County	Surrey
Postcode	KT5 8UM
Telephone	0900 123 456
Fax	0900 456 789
Account One Name	ForSaleToRent
Account One Number	12345678
Account One Sort Code	12-34-56
Account Two Name	
Account Two Number	
Account Two Sort Code	

At the bottom right of the form is a button labeled "Update Banking Information" with a green arrow icon.

VAT Rate

The VAT rate has been set at 17.5%. However, if the rate changes, you can set a new default rate.

- Select **Start > Programs > Agency Manager Professional > Agency Manager Management Console**
- Log in to the database using your usual log in details
- Select **Settings** from the left pane
- Enter the new VAT Rate in the right pane
- Click on 'Update Settings Information'.

The screenshot shows a form with a single field for "VAT Rate" containing the value "17.5" followed by a percentage sign "%". At the bottom right of the form is a button labeled "Update Settings Information" with a green arrow icon.

Currency Setting

You can change the Currency Symbol depending on which currency you use.

- Select **Start > Programs > Agency Manager Professional > Agency Manager Management Console**
- Log in to the database using your usual log in details
- Select **Settings** from the left pane
- Enter the new Currency Setting in the right pane
- Click on 'Update Settings Information'.

Currency Setting: €

VAT Rate: 17.5 %

[Update Settings Information](#) →

Database Users

When you install Agency Manager 3x, you will be using login name 'sa'. This has been entered as the default Administrator. However, you will need to add other users with their User Names. This will enable each user to work under their names rather than all working under the generic name 'sa'.

- Select **Start > Programs > Agency Manager Professional > Agency Manager Management Console**
- Select **Database Users** from the left pane

Users Database

Authentication Method: SQL and Windows Windows Only

Name	Type
BUILTIN\Administrators	Windows NT Group
DIGITAL\Administrator	Windows NT User
DIGITAL\Agency Manager Support	Windows NT Group
DIGITAL\brian	Windows NT User
DIGITAL\sukh	Windows NT User
ForSaleToRentWebBot	SQL Server User
McSukh Sanghera	SQL Server User

Username: (Type: Windows NT User)

Old Password:

New Password:

Check For Updates

- To add User Names - Select SQL Server User from the user drop down > Enter Name of User > Add Password (Optional) > Click on Add

	SQL Server User	<input type="button" value="Add"/>
Username	Test Name	<input type="button" value="Delete"/>
Old Password		<input type="button" value="Update"/>
New Password		

Database Back-Up


Backing up your database on a regular basis ensures that you always have a copy of your database in case your original copy is corrupted.

- Select **Start > Programs > Agency Manager Professional > Agency Manager Management Console**
- Select **Database Backup** from the left pane
- The Location of the Backup is set as a default of the location of the "Server"

Agency Manager Database Backup

Please note the location of the backup file is relative to the location of the "server"

Back Up to

[Back Up Now](#) 

- Click on 'Back Up Now'

Revive Archived Record

If you have deleted and Archived a record - you may need to retrieve that record.

- Select **Start > Programs > Agency Manager Professional > Agency Manager Management Console**
- Select **Revive Records** from the left pane

Revive Record(s)

Select a record to revive, it will then be restored to the database

<input type="checkbox"/>	68 Fred Street, Lewisham, SE3 7YH (Dr. Sue Kilton)
<input type="checkbox"/>	1A Shell Road, Wembley, HA4 8UJ (Dr. Steve & Emily Bust
<input type="checkbox"/>	2 Shelby Avenue, St Pauls, (Mr. James Brown)
<input type="checkbox"/>	3 Abercrombie Street, Woolwich, (Dr.)
<input type="checkbox"/>	4 Neville Place, Plumstead, ()
<input type="checkbox"/>	5 Plymouth Walk, Greenwich, ()
<input type="checkbox"/>	27 Sweden, Blackheath, ()
<input type="checkbox"/>	5 Denmark, Shooters Hill, (Sir)
<input type="checkbox"/>	96 SukhWinder Street, , ()
<input type="checkbox"/>	1A Shell Road, Wembley, HA4 8UJ (Mr. Steve & Emily Bust
<input type="checkbox"/>	2 Shelby Avenue, St Pauls, (Mr. James Brown)
<input type="checkbox"/>	3 Abercrombie Street, Woolwich, (Dr.)
<input type="checkbox"/>	4 Neville Place, Plumstead, (Dr.)
<input type="checkbox"/>	5 Plymouth Walk, Greenwich, ()
<input type="checkbox"/>	5 Denmark Hill, Shooters Hill, SE4 8UM (Sir Ronald McDona
<input type="checkbox"/>	27 Sweden, Blackheath, ()
<input type="checkbox"/>	2 Velvet Avenue, , (Miss diane chambers)
<input type="checkbox"/>	27 Well Hall Road, , (Mr. Stephen Wright)
<input type="checkbox"/>	34 Red road, Greenwich, SE3 7YH (Mr. Stan Smith)
<input type="checkbox"/>	34 The Road, Lewisham, SE4 8NM (Mr. Dave Smith)
<input type="checkbox"/>	The Spires, Chigwell, CH8 9IK (Mrs. Charlene Tilton)

Properties

- Select all records that you wish to revive back into Agency Manager - These are Applicant details only
- For Property details that you wish to revive - Select the Properties Tick box
- Click on Revive

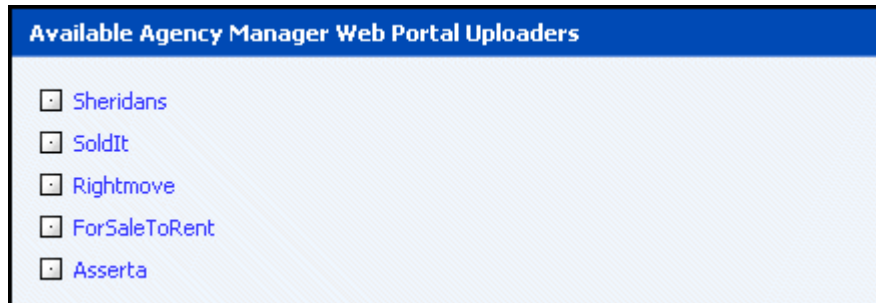
Related Topics

Delete Records

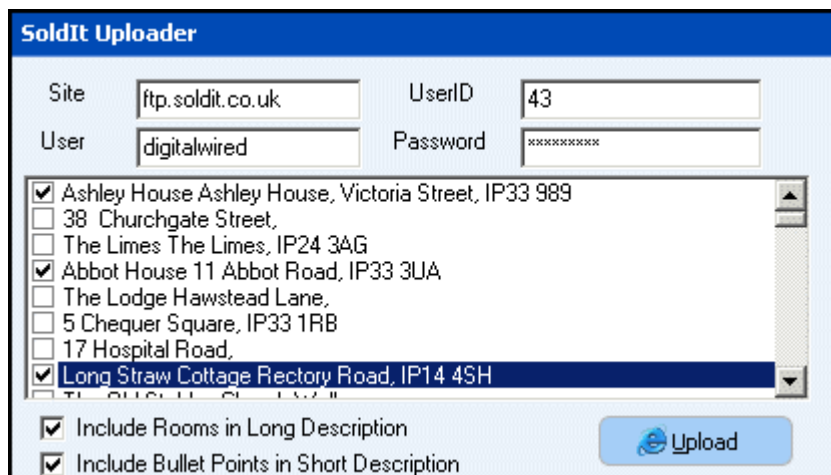
Web Portal Uploader

Allows you to upload property details to Property Portals such as SoldIt and Asserta or you can add an uploader to your own web site here.

- Select **Start > Programs > Agency Manager Professional > Agency Manager Management Console**
- Select **Web Portal Uploader(s)** from the left pane



- Click on the name of the Web to upload to



- Select details that you want to upload
- Enter your account details
- Click on Upload

Applicants

Click on the Applicants Button in the [Navigation Pane](#)

Click on the New Record Icon to enter the following Applicant Details:

[personal details](#)
[Type of property required](#)
[viewing requirements](#)
[their current mortgage position](#)
[their current Solicitor's details](#)
[Applicant Prospect](#)
Send SMS Text Messages

Once in this screen, you can also view Applicant's:

Matched properties

Journal of file updates


Applicant Details

You can add all personal details about the applicant, e.g. Name, Address, Phone Number, email address, Buying Position, when they want to move by and how much deposit they have to put down.

- Click on the Applicants Button in the [Navigation Pane](#)
- Click on the Applicant Details tab
- Enter required details
- To move to the next field, either click into the new area or press the Tab key on your keyboard.
- Once you have filled in all required fields, simply click onto the next Tab.

Property Details

You can add all details about the property, e.g. address, type of property, generic details about property - number of bathrooms, bedrooms, reception rooms, floors, heating, garage & bathrooms, asking price, vendors valuation, agent's valuation and any comments you feel are required.

- Click on the Properties Button in the [Navigation Pane](#)
- Click on the Property Details tab
- Enter required details
- If this is the property that is for sale - click on the "is this the property for sale?" tick box **Is this the property for sale ?** By clicking this tick box, you won't have to re-enter duplicate address details.
 If you do not select this option and click off to a different screen - you do not get the chance to click on it again, so you have to type in the details separately.
- To move to the next field, either click into the new area or press the Tab key on your keyboard.
- Once you have filled in all required fields, simply click onto the next Tab.


Applicant Match

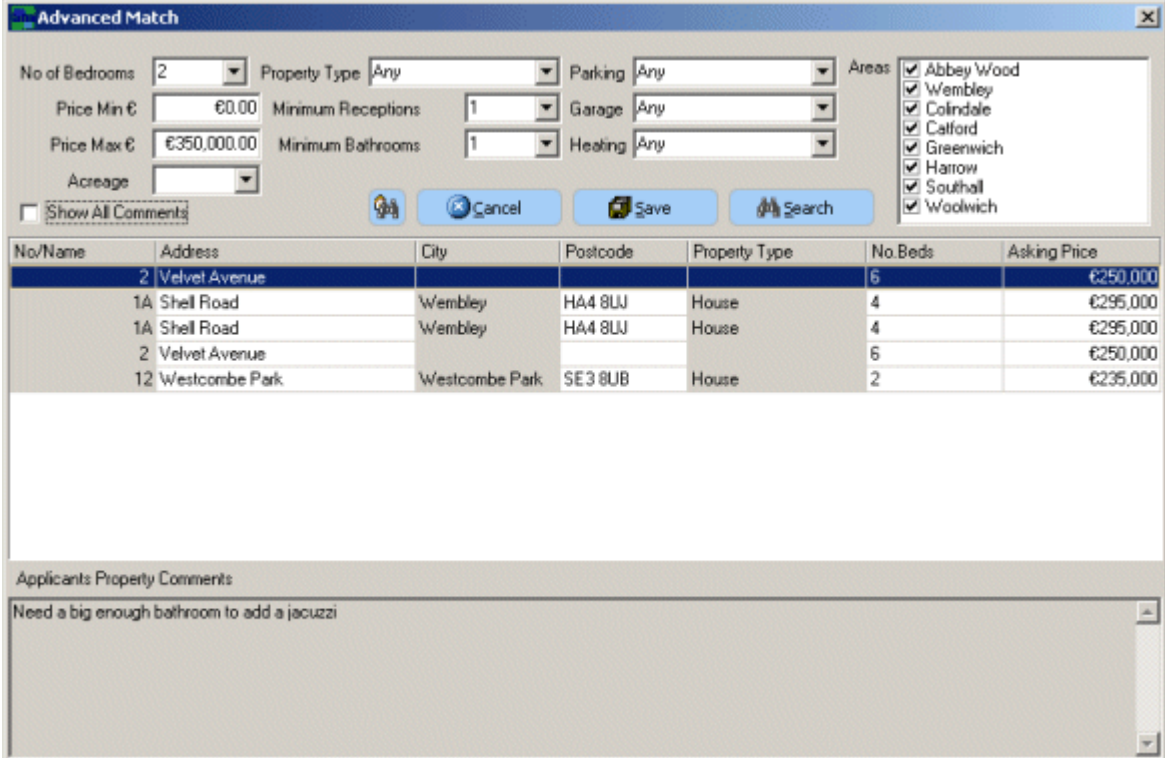
This allows you to Match by bedrooms and price what the applicant requires with what is available on your books. For a more detailed and specific Match, please refer to Advanced Match

- Click on the Applicants Button in the [Navigation Pane](#)
- Click on the Match tab
- All records are matched generically by Price Range and Bedrooms entered in [Property Details](#)
- A list of properties will appear which match the general criteria as described above

Advanced Match

To filter more thoroughly the Match criteria of Applicant to Property, you can use the Advanced Match functionality.

- Click on the Applicants Button in the [Navigation Pane](#)
- Click on the Match tab in Applicants
- Click on the Advanced Match Icon on the toolbar 






Advanced Match

No of Bedrooms: 2 | Property Type: Any | Parking: Any | Areas: Abbey Wood, Wembley, Colindale, Calford, Greenwich, Harrow, Southall, Woolwich

Price Min €: 60.00 | Minimum Receptions: 1 | Garage: Any

Price Max €: €350,000.00 | Minimum Bathrooms: 1 | Heating: Any

Acreage: []

Show All Comments |  Cancel |  Save |  Search


No/Name	Address	City	Postcode	Property Type	No.Beds	Asking Price
2	Velvet Avenue				6	€250,000
1A	Shell Road	Wembley	HA4 8UJ	House	4	€295,000
1A	Shell Road	Wembley	HA4 8UJ	House	4	€295,000
2	Velvet Avenue				6	€250,000
12	Westcombe Park	Westcombe Park	SE3 8UB	House	2	€235,000

Applicants Property Comments:

Need a big enough bathroom to add a jacuzzi

- In order to match applicant to property, all fields must match **exactly**. If you wish not to be so specific on receptions, bedrooms, etc - leave them at a minimum figure and select 'Any' where necessary.
- In order to view Property Comments - ensure the 'Show All Comments' tick box is selected - this will allow you to check Applicant requirements against Property Details.
- Select the required Match details and click on Search

Book Property Viewing


- Click on the Applicants Button in the [Navigation Pane](#)
- Click on the Match tab
- Click on the Address of the Property that you wish to book a viewing for
- Click on the Book Viewing Icon  Book Viewing
- Enter required time and date in the Book Viewing Dialogue box

Add A Booking

Please note that if you have Microsoft® Outlook you can add this viewing to your own diary as well.

For **Mr. Tony Currie**

To View **1A Shell Road**

On  At

With

Add this appointment to my Outlook diary.

- Add name of Agent
- Select 'Add this appointment to my Outlook diary' if you want to add it to Outlook
- Click on Add

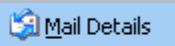
Financial Services

This allows you to enter the mortgage position of the applicant. You can enter whether or not they have an existing mortgage, who the lender is and their information and crucially, whether they require Financial Services.

- Select Applicants from the [Navigation Pane](#)
- Click on the Financial Services tab
- If applicant has existing mortgage, ensure the Existing Mortgage tick-box is selected, then enter Lender name and details.
- If applicant does not have existing mortgage but wishes to receive Financial Services advise, click on the 'Requires Financial Services' tick box
- Select the Financial Advisor to notify from the "Select Financial Advisors to Mail Details to" edit box. Click on Mail Details (will only work if email address was entered in Financial Advisor Contact Details).



Select Financial Advisors to Mail Details to.

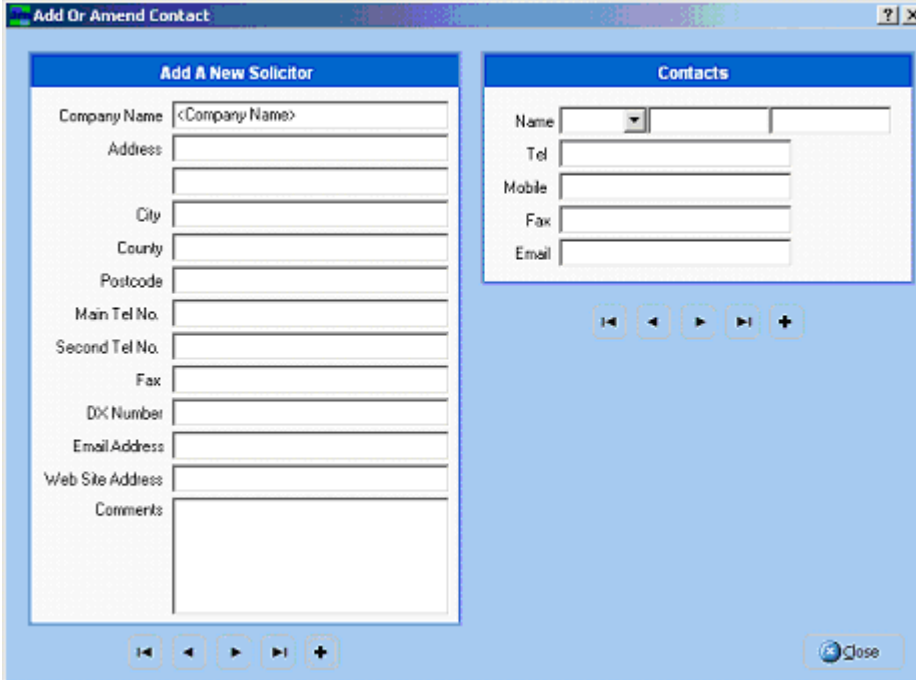
<input type="checkbox"/> What if this changes
<input type="checkbox"/> 2nd Finance
<input type="checkbox"/> hello man
<input type="checkbox"/> This is New on 17th
<input type="checkbox"/> Take 37
<input type="checkbox"/> Lets Try Again
<input type="checkbox"/> What about now
<input type="checkbox"/> batty boy
<input type="checkbox"/> Check This Out
<input checked="" type="checkbox"/> Small Fees



Solicitor Details

This allows you to enter the Solicitor details for the applicant and vendor. You can enter name, address, email addresses and other contact details.

- Click on the Applicants or Properties Button in the [Navigation Pane](#)
- Click on the Solicitor tab
- Click on Add/Amend Solicitor 
- To enter new solicitor details click on the Add button 
- Enter Solicitor details
- To add Contacts - click the Add button in the Contacts section after each new contact has been added.



Applicant Bank Details

This allows you to enter the Bank details of the applicant for reference purposes. You can enter name, address and contact information.

- Click on the Applicants Button in the [Navigation Pane](#)
- Click on the Bank tab
- Enter required details

Journal

This allows you to view all changes and additions to a record once that record has been created. You can also add other conversation details as they happen - e.g. telephone conversation, faxed details, email messages, text messages and verbal conversations.

There is a separate Journal for both Applicants and Properties.

- Click on the Journal tab
- If the change that you make to a record is done in the application, you need not make a manual change to the journal
- If the conversation is verbal or non-application based, e.g. Fax, email, phone etc, click on the Contact Type drop-down arrow
- Select type of entry required
- Enter description
- Click on Add

Applicant Prospect

About Applicant Prospect

This allows you to judge the type of prospect that the applicant is.

- Click on the Applicants Button in the [Navigation Pane](#)
- Using the right-mouse button, click once on Prospect on the Agency Manager Task Bar (at the bottom of the application)
- Click on type of prospect required



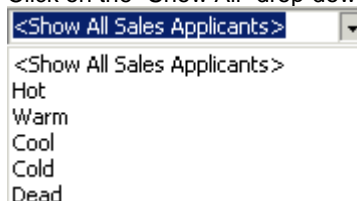
Related Topics

[Filter By Prospect Type](#)

Filter By Prospect Type

This allows you to display all records belonging to a particular Prospect group. E.g. by Hot, Cold or Cool.

- Click on the Applicants Button in the [Navigation Pane](#)
- Click on the "Show All" drop-down icon from the toolbar



- Select the category to be filtered by.

Related Topics

[Applicant Prospect](#)

Properties

Enter New Property Details

- Click on the Properties Button in the [Navigation Pane](#)
- Click on the New Record Icon to enter the following Property Details:
- [personal details](#)
- [type of property for sale](#)
- [room descriptions](#)
- [photographs of rooms](#)
- [advertising descriptions and bullet points](#)
- [commission terms](#)
- [solicitor details](#)
- [property status](#)

From this screen, you can also view Vendor's:

- matched properties to applicants
- Journal of file updates
- [map of location](#)


Vendor Details

You can add all personal details about the applicant, e.g. Name, Address, Phone Number, email address, Buying Position, when they want to move by and how much deposit they have to put down.

- Click on the Properties Button in the [Navigation Pane](#)
- Click on the Vendor tab
- Enter required details
- To move to the next field, either click into the new area or press the Tab key on your keyboard.
- Once you have filled in all required fields, simply click onto the next Tab.


Property Details

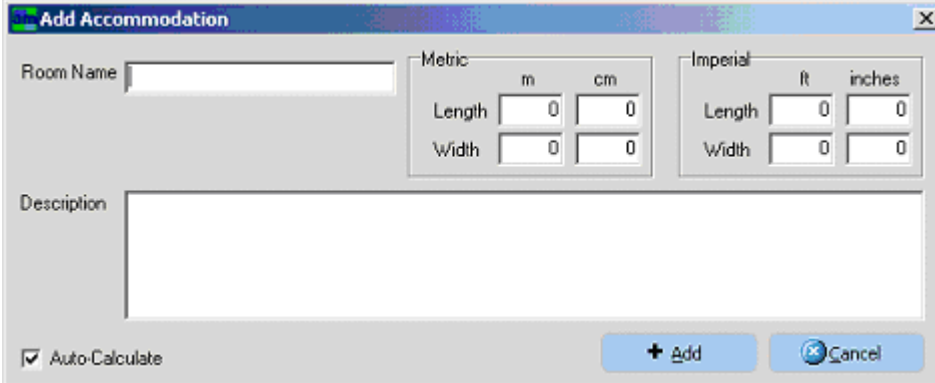
You can add all details about the property, e.g. address, type of property, generic details about property - number of bathrooms, bedrooms, reception rooms, floors, heating, garage & bathrooms, asking price, vendors valuation, agent's valuation and any comments you feel are required.

- Click on the Properties Button in the [Navigation Pane](#)
- Click on the Property Details tab
- Enter required details
- If this is the property that is for sale - click on the "is this the property for sale?" tick box **Is this the property for sale?** By clicking this tick box, you won't have to re-enter duplicate address details.
 **TIP** If you do not select this option and click off to a different screen - you do not get the chance to click on it again, so you have to type in the details separately.
- To move to the next field, either click into the new area or press the Tab key on your keyboard.
- Once you have filled in all required fields, simply click onto the next Tab.

Accommodation Details

The Accommodation tab allows you to add all room dimensions and descriptions.

- How?
- Click on the Properties Button in the [Navigation Pane](#)
- Click on the Accommodation tab
- Click on the Add icon 
- Enter Room name and dimensions and description of room.



- To ensure that both Metric and Imperial conversion is active - the Auto-Calculate tick box should be checked.
- Click on the Add button
- The room details are added to the Accommodation list.



Related topics

[Edit Accommodation List](#)

[Rearrange Accommodation List](#)

Edit Accommodation List

Once you have added room details to your accommodation list, you can edit the details at any time.

- Select the Property Record that you want to edit
- Select the **Accommodation** tab
- Click on the Room Name that you wish to edit
- Click on the Edit icon 
- Edit details as required
- Click on the Add icon 

Related Topics

[Accommodation Details](#)

[Rearrange Accommodation List](#)

Photographs

The Photos tab allows you to add up to seven photographs of the property to the record. Once you have taken the photographs, save them to your PC in the required folder.

- Click on the Properties Button in the [Navigation Pane](#)
- Click on the Photos tab
- Double-click on the image frames to add the required photograph.
- The directory tree for your computer will be displayed, locate the photos in the folder that they were saved to.
- Select the photograph, click on Open.
- In order to fit the photograph to the largest image frame, click on the 'Stretch to fit' tick-box

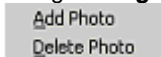


Related Topics:

[Remove or Change Photos](#)

Remove or Change Photo

- *To remove photo:*
- Using the **Right** mouse button, click on the picture you wish to remove > Select **Delete Photo**



- *To change photo:*
- Double-click on the photo to be changed
- Select new photo
- Click on OK

Advertising

The Advertising tab allows you to enter details that can be used with the marketing brochures. There is room to add Heading, Detail and Summary text along with bullet point entries and an area to add directions from your office to the property.

- Click on the Properties Button in the [Navigation Pane](#)
- Click on the Advertising tab
- Click into the necessary text box and type the necessary detail.
- To move easily from one text box to the next, press the tab key or click into the required area.

Terms

Allows you to enter the type of commission agreement you have with the vendor - for example, sole agent agreement. Also, enter the commission rate applicable to the agreement.

- Click on the Properties Button in the [Navigation Pane](#)
- Click on the Terms tab

- Select the Agency Agreement type for this vendor

Agency

Sole Agent

Joint Sole Agents

Multiple Agency

- Select type of Fee agreement

Fee

Percentage

Fixed Fee

- Enter the Percentage or Fixed Fee amounts in the corresponding Commission boxes - i.e. Sole Agent, Joint Sole Agents or Multiple Agency.

Sole Agent Commission

Percentage %

Fixed Fee

For Example:

- The total amount will display in the Total Bar at the bottom of the page

Total Fee	<input type="text" value="€1,000.00"/>	Tax @ 17.5%	<input type="text" value="€175.00"/>	Total (Inc. Tax)	<input type="text" value="€1,175.00"/>
-----------	--	-------------	--------------------------------------	------------------	--

- if you are entering Joint Sole Agents - you may enter the other Agent details in the edit bars next to the Joint Sole Agents Commission box



You may enter amounts for all variations in case they change later on - however the only total that will appear in the Total Bar is the combination of Agency + Fee


Property Match

This allows you to Match what is available on your books to what the applicant requires.

- Click on the Properties Button in the Navigation Pane
- Click on the Match tab
- All applicants that are searching for properties that match the details entered in the vendor property details, will be displayed

Property Advanced Match

To filter Applicants from Properties:

- Click on the Advanced Match Icon 
- This opens up the Advanced Match Filter
- Enter the required Filter Option
- Click on Match
- To reset the results, click on Clear

Advanced Match

Prospect Type

Maximum Price

Minimum Price

Number of Bedrooms


Bathrooms

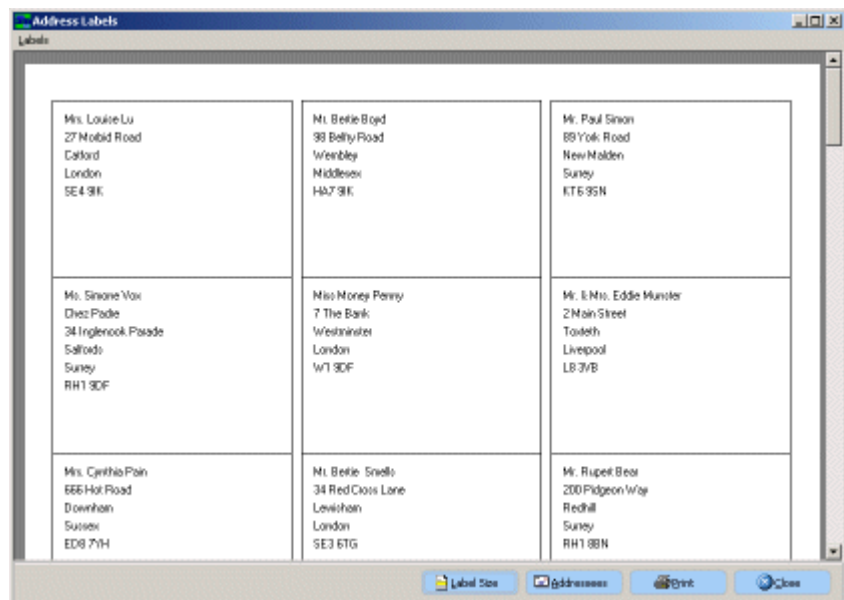
Receptions

Garden

Labels

Labels allows you to create a Label Print List from the Matched Applicants and Properties.

- Click on either the Applicants or Properties Button from the [Navigation Pane](#)
- Click on the Match Tab
- Click on the Label Icon 
- All records that matched will appear in the Label List.



- Place Label Sheet in Printer, Click on the Print Icon 

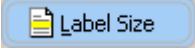
Related Topics:

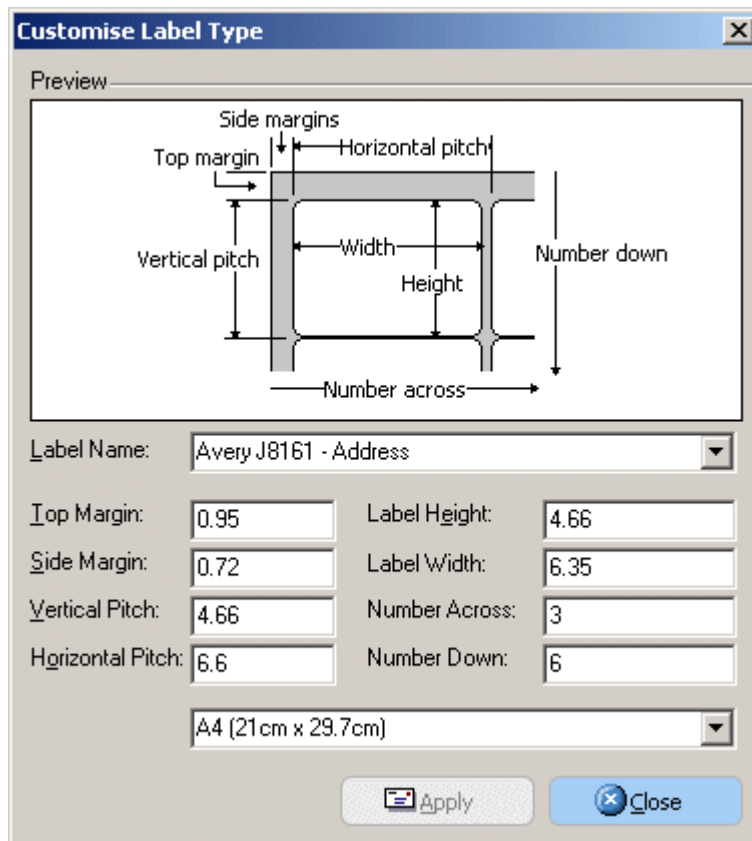
[Change Label Size](#)

[Deselect Selected Addresses](#)

Change Label Size

To choose the right label size for your labels:


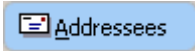
- Click on either the Applicants or Properties Button from the [Navigation Pane](#)
- Click on the Match Tab
- Click on the Label Icon
- Click on the Label Size Icon 
- Either Select the Label Name or enter label dimensions in the Customise Label Type window



- Click on Apply
- Click on Close

Select / Deselect Addresses


Labels allows you to create a Label Print List from the Matched Applicants and Properties.

- Click on either the Applicants or Properties Button from the [Navigation Pane](#)
- Click on the Match Tab
- Click on the Label Icon 
- Click on the Addressees Icon 
- Either Select or Deselect Name of Addressee to print label for



- Click on Apply

Book Property Viewing


- Click on the Applicants Button in the [Navigation Pane](#)
- Click on the Match tab
- Click on the Address of the Property that you wish to book a viewing for
- Click on the Book Viewing Icon  Book Viewing
- Enter required time and date in the Book Viewing Dialogue box

Add A Booking

Please note that if you have Microsoft® Outlook you can add this viewing to your own diary as well.

For **Mr. Tony Currie**

To View **1A Shell Road**

On  At


With

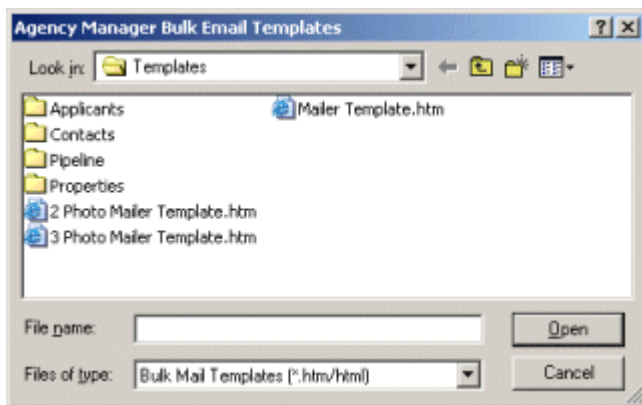
Add this appointment to my Outlook diary.

- Add name of Agent
- Select 'Add this appointment to my Outlook diary' if you want to add it to Outlook
- Click on Add

Bulk Email

Bulk Email allows you to email new property details to all existing applicants that match the property requirements.

- Click on Properties in the [Navigation Pane](#)
- Select New Record
- Enter Property Details
- Once the new details have been entered for the new property, click on the 'Match' tab.
- Any Applicants that match their requirements to the property details, will be displayed.
- Click on the Bulk Mail icon on the toolbar 
- The Agency Manager Bulk Email Templates dialog box is opened, select the template that you wish to use, click on Open.



- This will open MS Outlook and prepare the mail.
- Once it is prepared for each recipient, you are asked to confirm that you wish to mail. Select OK.



Edit Data prior to send

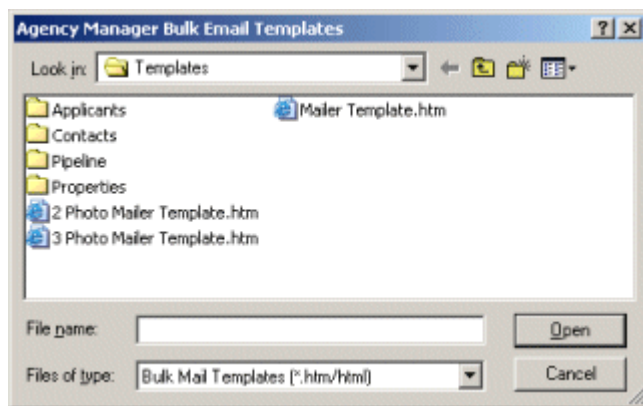
- In order to save the eMail to your screen before sending it, select Tools > Configuration
- Ensure the "Save emails rather than sending straight away" option is ticked.
 Save emails rather than sending straight away.

- This will create the mail ready for you to edit rather than send straight away

Single Email

Single Email allows you to email new property details to a single recipient even if you do not have their applicant details on file.



- Click on Properties in the [Navigation Pane](#)
- Search for the Property that the applicant is interested in 
- Click on the Single Mail icon 
- The Agency Manager Bulk Email Templates dialog box is opened, select the template that you wish to use, click on Open.



- Enter the eMail address of the applicant
- This will open MS Outlook and prepare the mail.
- The mail is prepared and ready to send. If you wish to edit the mail, make changes before sending
- Click on Send

Solicitor Details

This allows you to enter the Solicitor details for the applicant and vendor. You can enter name, address, email addresses and other contact details.

- Click on the Applicants or Properties Button in the [Navigation Pane](#)
- Click on the Solicitor tab
- Click on Add/Amend Solicitor 
- To enter new solicitor details click on the Add button 
- Enter Solicitor details
- To add Contacts - click the Add button in the Contacts section after each new contact has been added.

Journal

This allows you to view all changes and additions to a record once that record has been created. You can also add other conversation details as they happen - e.g. telephone conversation, faxed details, email messages, text messages and verbal conversations.

There is a separate Journal for both Applicants and Properties.


- Click on the Journal tab
- If the change that you make to a record is done in the application, you need not make a manual change to the journal
- If the conversation is verbal or non-application based, e.g. Fax, email, phone etc, click on the Contact Type drop-down arrow
- Select type of entry required
- Enter description
- Click on Add

Property & Applicant Viewing History

An automatically generated list of all viewings that have or will take place at a property and all bookings for viewings by applicant. A quick and easy view of all viewings for properties and for all viewings for applicants.

- Click on the Applicants **or** Properties Button in the [Navigation Pane](#)
- Click on the Viewing Tab

Book Property Viewing

- Click on the Applicants Button in the [Navigation Pane](#)
- Click on the Match tab
- Click on the Address of the Property that you wish to book a viewing for
- Click on the Book Viewing Icon  Book Viewing
- Enter required time and date in the Book Viewing Dialogue box

Add A Booking

Please note that if you have Microsoft® Outlook you can add this viewing to your own diary as well.

For **Mr. Tony Currie**

To View **1A Shell Road**

On At

With

Add this appointment to my Outlook diary.

- Add name of Agent
- Select 'Add this appointment to my Outlook diary' if you want to add it to Outlook
- Click on Add

Property Status

This allows you to change the status of the sales process, for example from on market to under offer to completed. You can also view all those that have viewed a property, made an offer on that property and had the offer accepted. Finally, it allows you to enter the offer price and whether it is accepted.

Once an offer is accepted, it will add the Property to the Sales Pipeline.

- Click on the Properties Button in the [Navigation Pane](#)
- Click on the Property Status tab
- To change the Status of the Sales Process, click on the drop-down arrow and select the new status, e.g. if the status changes from 'on market' to 'under offer', select Under Offer from the drop-down list

Status Of Sales Process

- To view a list of all applicants that have viewed, made an offer or had an offer accepted for a particular property, select the appropriate 'Marketing Status' - Viewed, Offer Made or Offer Accepted from the drop-down menu.

Marketing Status

Show All Viewings

Applicant Name

- Mr. Mark Darcy
- Mr. & Mrs. Bruce Lee
- Mr. Peter Storey

Name

Address

Home Tel

Other Tel

Mobile

Offer Made

Offer Amount

Offer Accepted


Exchange Date 27/05/2002

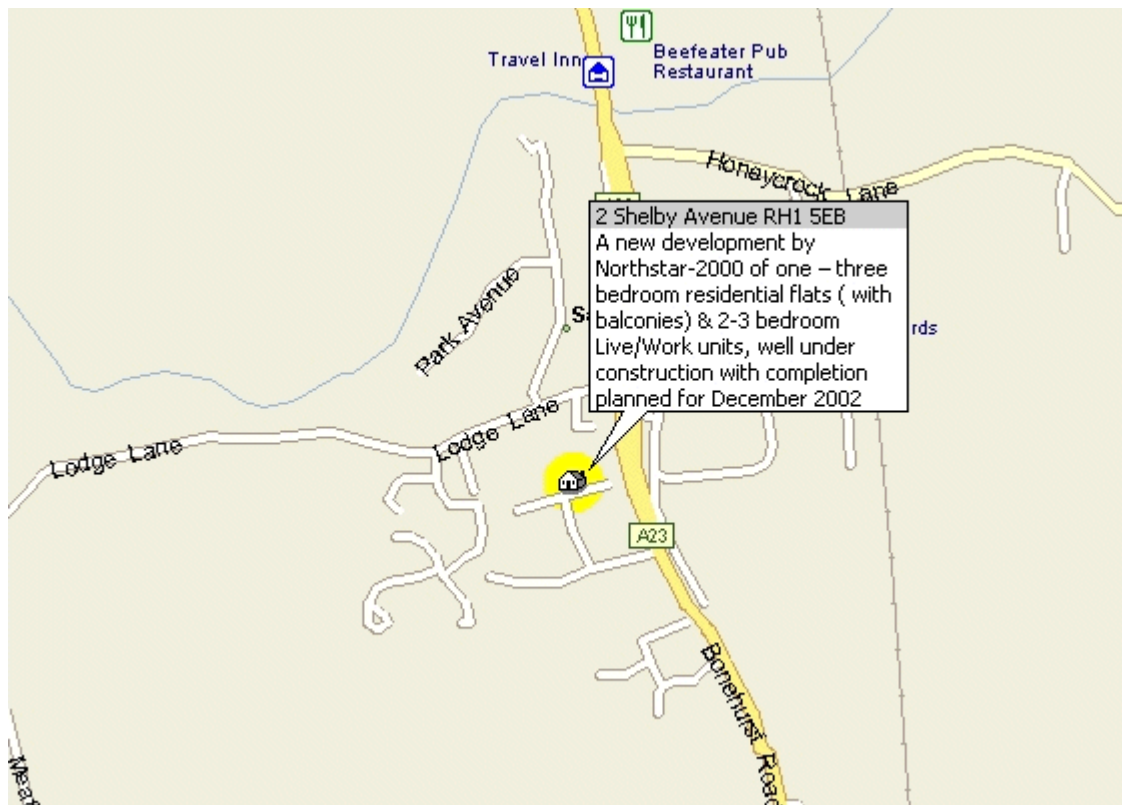
Completion Date 31/07/2002

- All applicant names are listed in the text box beneath, as you click on each applicant, the applicant's personal details are displayed to the right.
- If an offer is made, select the Offer Made tick box, this will activate a separate area for you to add 'offer amount'.
- If the offer is accepted, select the Offer Accepted tick box, which will activate and add the Property into the [Sales Pipeline](#).

Mapping

The Mapping facility allows you to be able to call up a map to display location of property by postcode. You must have **Microsoft Map Point (2002 or above)**

- Click on the Properties Button in the [Navigation Pane](#)
- (Ensure all property address details are completed) Select the Map tab
- Click on the Map icon 
- If all address details are correct - a map of the location will be inserted into Agency Manager



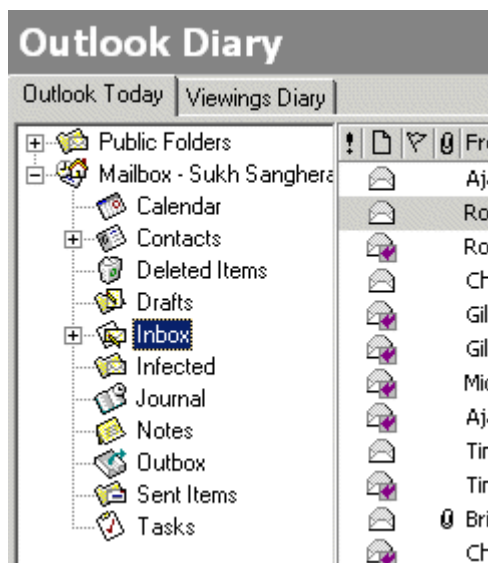
Diary

The Diary section allows you to view your Outlook Folders and your Viewings Diary.

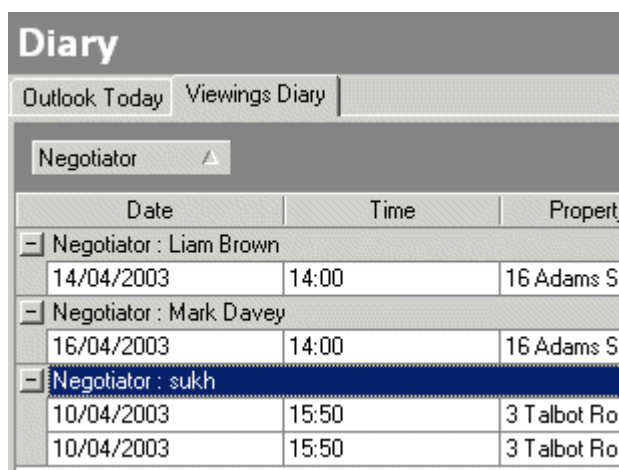
Outlook Today links to your Microsoft Outlook (versions 98 onwards only) running on your machine. It will enable you to view your Inbox, Diary, Contacts, Tasks and Notes from Outlook (You must have Outlook operating on your PC to enable this section).

The Viewings Diary allows you to view appointments that have been set up for you or all appointments that have been set up for you and your colleagues in your office. These appointments are automatically entered when you arrange viewings.

- Click on the Diary Button in the [Navigation Pane](#)
- On the Navigation Pane under the Diary heading, are listed the folders Inbox, Diary, Contacts, Tasks and Notes - these are automatically picked up from your Outlook running on your PC. To view the contents of these folders, click on the relevant icon. Your folder list is displayed under Outlook Today



- The Viewings Diary lists all viewings that you or your colleagues may have



- To view all viewings for you and your colleagues - click on the 'Show All' icon
- To view just your viewings - click on the 'Show My' icon




Show All

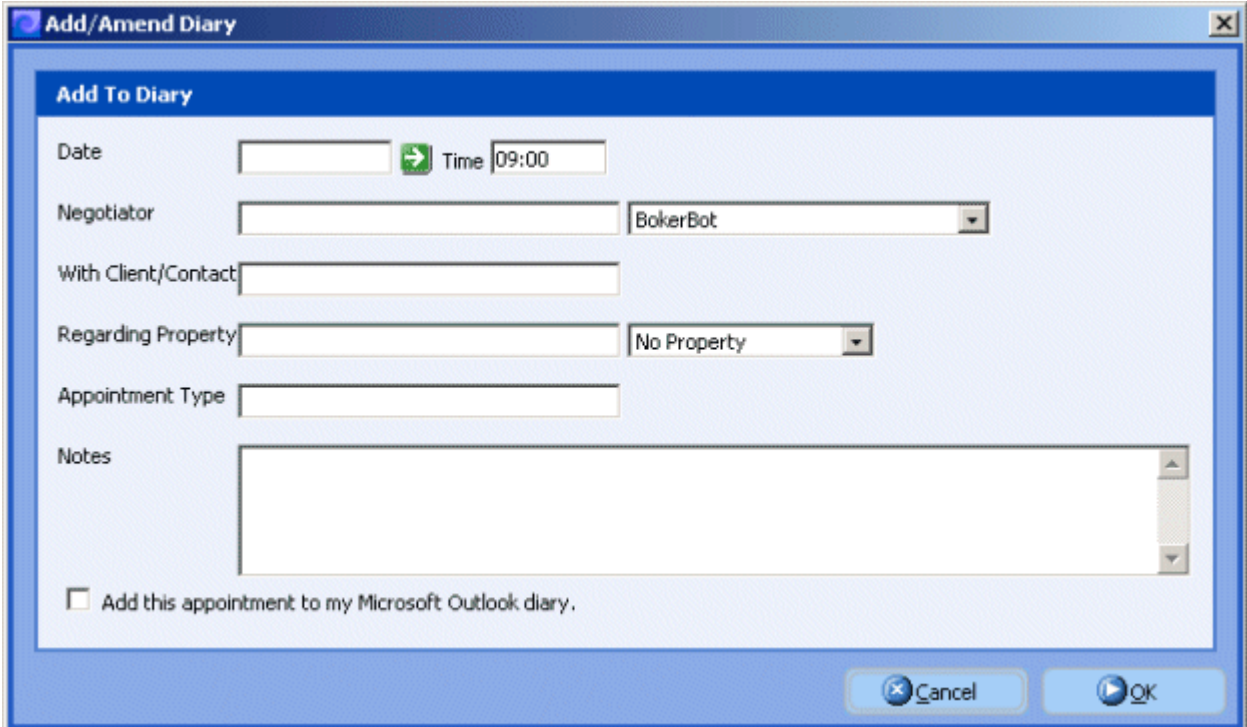


Show My

Add Diary Event

To add any event in the diary (Valuation, meeting, appointment, etc):

- Click on the Add Diary Event Icon 
- Complete the details as required



- If you want to add this appointment to your Outlook Diary - ensure the tick box is selected.
- Click on OK

Viewings Book

The Viewings Book allows you to filter viewing appointments for both yourself and your colleagues. You filter by date so that you can view appointments just for a time period that you request.

- Click on the Viewings Book Button in the [Navigation Pane](#)
- Click on either Show All (to view all appointments for you and your colleagues in the office) or Show My (to view just your appointments)



- Click on the Date From drop-down arrow and select the date that you want the filter to start from **From:** 03/03/2003
- Select the From date from the drop down calendar
- Click on the Date To drop-down arrow and select the date you want to filter to end **To:** 08/05/2003
- Select the To date from the drop down calendar

March 2003						
Mon	Tue	Wed	Thu	Fri	Sat	Sun
24	25	26	27	28	1	2
3	4	5	6	7	8	9

March 2003						
Mon	Tue	Wed	Thu	Fri	Sat	Sun
24	25	26	27	28	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31	1	2	3	4	5	6

Today: 24/04/2003

Group By Column

You can group lists of records by Column Header (e.g. By Negotiator in Viewings)

- Click and drag the column header (that you wish to group by) to the Group By Bar

Date	Negotiator	Time	Property Viewed
16/04/2003	Mark Davey	14:00	16 Adams Street
14/04/2003	Liam Brown	14:00	16 Adams Street
10/04/2003	sukh	15:50	3 Talbot Road
10/04/2003	sukh	15:50	3 Talbot Road

- All entries are grouped by the category that you dragged to the Group By bar. e.g.

Applicant Name	Property Viewed
+ Negotiator : Liam Brown	
+ Negotiator : Mark Davey	
+ Negotiator : sukh	

- By clicking on the + icon next to each category - you can expand the list to show the full list for that category.
- To show all lists click on the 'Expand All' icon



- To hide all lists click on the 'Collapse All' icon



Move a column

You can move the order of Detail Columns to any order that you wish.

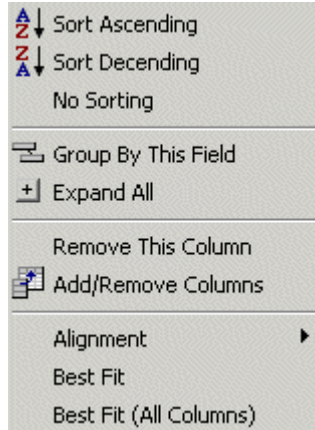
- Hold the mouse key down over the column header you wish to move
- Drag the mouse to the area you wish to place the header
- When the + arrows appear in the area you wish to place the header, release the mouse

Time	Negotiator	Property	Vendor Confirmed
------	------------	----------	------------------

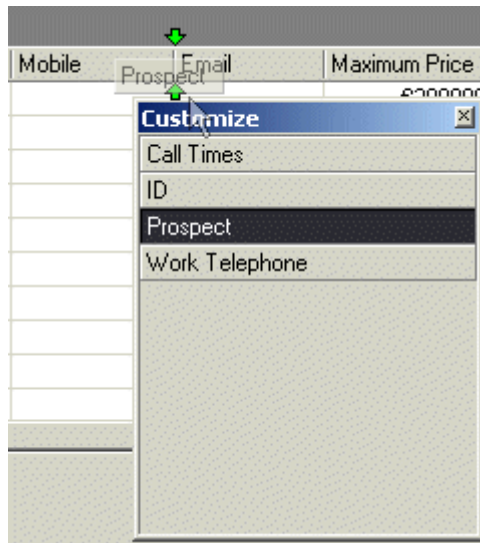
Remove/Add Columns

You can remove or add columns to view only information that you want to

- Right-click on the Column Header



- To remove that Column from view > Select **Remove This Column**
- To add a new Column > Select **Add/Remove Columns**
- Drag required column header to position that you wish to view new information



Contacts

Contacts enables you to enter solicitor, accountant, estate agent, builder, etc details. When entered in Contacts, some of these details are easily usable in Agency Manager

- Click on the Contacts Button from the [Navigation Pane](#)
- Click on the New Contact icon in the Navigation Pane




- Click on the Type drop-down arrow, select the type of entry to make - e.g. Solicitor, Accountant, etc.
- Enter company name, address and company contact details.
- For individual contacts within the company, enter details in the 'Contacts' section
- Enter the name of the contact and their contact details, e.g. phone number, email address, etc.
- To add more or delete contact from the Contacts section, click on the Add or Delete Icons



Viewings

Book Property Viewing


- Click on the Applicants Button in the [Navigation Pane](#)
- Click on the Match tab
- Click on the Address of the Property that you wish to book a viewing for
- Click on the Book Viewing Icon  Book Viewing
- Enter required time and date in the Book Viewing Dialogue box

Add A Booking

Please note that if you have Microsoft® Outlook you can add this viewing to your own diary as well.

For **Mr. Tony Currie**

To View **1A Shell Road**

On  At

With

Add this appointment to my Outlook diary.

- Add name of Agent
- Select 'Add this appointment to my Outlook diary' if you want to add it to Outlook
- Click on Add

Sales Pipeline

The Sales Pipeline allows you to keep check of all sales that have reached at least the 'Under Offer' stage of the sales process. As soon as the Property Status turns to Under Offer, that property is added to the Sales Pipeline.

The Sales Pipeline contains all information with regards to Applicant and Applicant Solicitor, Vendor and Vendor Solicitor, Address of Property, Price Agreed, Survey Date, Exchange Date and Completion Date.


To view the Sales Pipeline, click on the Sales Pipeline button on the [Navigation Pane](#).

Using Sales Pipeline

The sales pipeline allows you to monitor the sales process once a property has had an offer made and accepted.

- Click on the Sales Pipeline Button in the [Navigation Pane](#)
- Once the offer has been accepted, the property will be added to the sales pipeline.
- Using the Previous, Next, etc icons search for the record



- Alternatively, click on the search icon in the navigation pane  to search for the property

- Pipeline Details allows you to view Vendor and Applicant details.
- Click on the More Details tab
- Enter the details for:
 Sale Status (keep it updated)
 Offer Price
 Agreed Price
 Sold Price
 Renegotiation Price and Date
 Sale Agreed Date
 Survey Date
 Exchange Date
 Completion Date
 Special Terms / Comments

68 Fred Street

Pipeline Details
More Details
Journal
Surveyor

Sale Status	<input type="text" value="Under Offer"/>	
Offer Price	<input type="text" value="£170,000.00"/>	
Agreed Price	<input type="text"/>	
Sold Price	<input type="text"/>	
Renegotiation Price	<input type="text"/>	on <input type="text"/>
Sale Agreed Date	<input type="text"/>	
Survey Date	<input type="text"/>	
Exchange Date	<input type="text"/>	
Completion Date	<input type="text"/>	

Special Terms / Comments

Sales Pipeline Journal

This allows you to view all changes and additions to a record once that record has been created. You can also add other conversation details as they happen - e.g. telephone conversation, faxed details, email messages, text messages and verbal conversations.


- How?
 - Click on the Sales Pipeline Button in the [Navigation Pane](#)
 - Click on the Journal tab
 - If the change that you make to a record is done in the application, you need not make a manual change to the journal
 - If the conversation is verbal or non-application based, e.g. Fax, email, phone etc, click on the Contact Type drop-down arrow
 - Select type of entry required
 - Enter description
 - Click on Add

Sales Pipeline Surveyor

You can add contact details for the Surveyor - and this can be added automatically to your Contacts list.

- How?
 - Click on the Sales Pipeline Button in the [Navigation Pane](#)
 - Click on the Surveyor tab
 - If the Surveyor is in the Contacts list already, click on the drop-down arrow next to the Surveyor Name edit bar and select the name of the Surveyor.
 - Alternatively, if the surveyor is **not** in the Contacts list previously, select <Add New Surveyor>



- Enter all Surveyor Company details
- Enter new Surveyor Contact
- Click on the Plus to add more contacts 
- Click on Close



Search

To search for records previously entered into Applicants, Properties or Contacts, click on the Search icon from that page of Agency Manager.



Search for Applicant

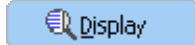
- Click on the Applicants Button in the [Navigation Pane](#)



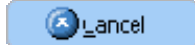
- Click on Search in the Navigation Pane
- Enter the Surname of the Applicant in the Surname edit bar

Surname

- If you wish to display the record, click on Display



- To discard information, click on Cancel



Search for Properties

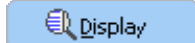
- Click on the Properties Button in the [Navigation Pane](#)



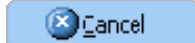
- Click on Search in the Navigation Pane
- Enter the Street of the Property in the Property edit bar

Street

- If you wish to display the record, click on Display



- To discard information, click on Cancel



Search for Vendor

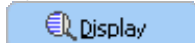
- Click on the Properties Button in the [Navigation Pane](#)



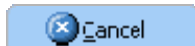
- Click on Vendor Search in the Navigation Pane
- Enter the Surname of the Vendor in the Surname edit bar

Surname

- If you wish to display the record, click on Display



- To discard information, click on Cancel



Search for Contact

- Click on the Contacts Button in the [Navigation Pane](#)



- Click on Search in the Navigation Pane
- Enter the Company Name of the Contact in the Company edit bar

Company

- If you wish to display the record, click on Display



- To discard information, click on Cancel

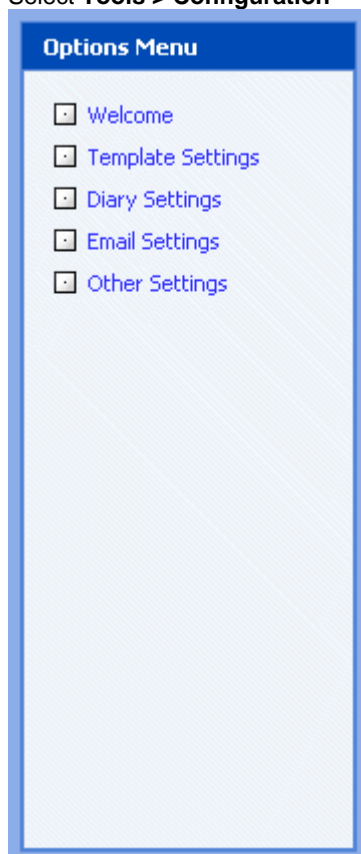


Configuration

Agency Manager Configuration

Configuration allows you to set default settings for parts of Agency Manager.

- Select **Tools > Configuration**

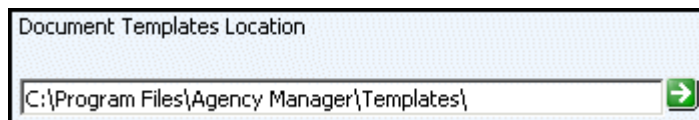


- From here you can configure:
 - [Template Settings](#)
 - [Shared Journal Location](#)
 - [Diary Settings](#)
 - [Email Settings](#)
 - [Other](#)

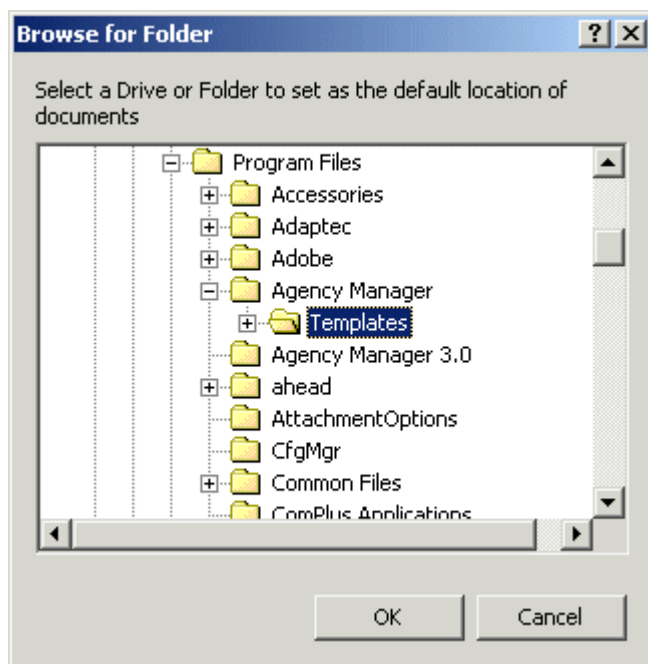
Configure Template Directory

In order to set the templates to the Templates Menu, you must first configure the Document Location.

- Select the **Tools** Menu > **Configuration**
- Select **Template Settings** from the left pane
- Click on the blue Locate Arrow icon to the right of the Document Location edit bar



- Navigate the location to the Program Files > Agency Manager > Templates



- Click OK

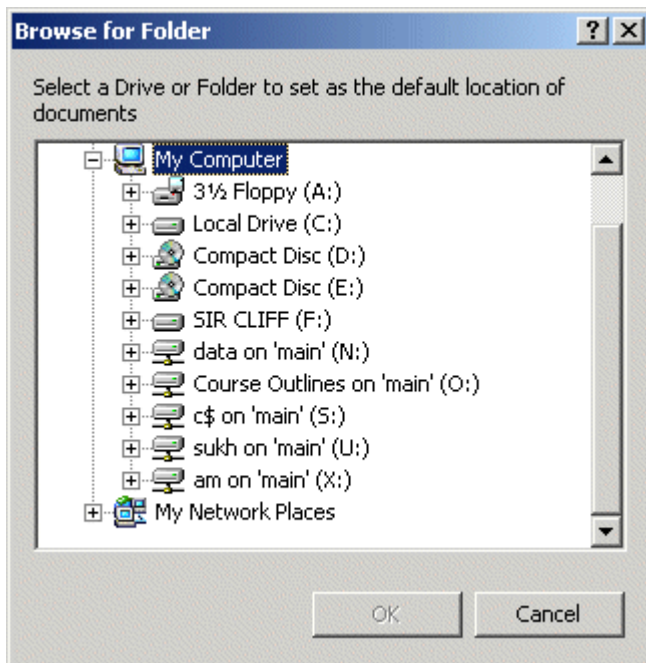
Configure Workgroup Journal Entry Location

Configuring the location allows you to decide where on the server you wish to place the Workgroup Notes Documents

- Select the **Tools** Menu > **Configuration**
- Select **Template Settings** from the left pane
- Click on the blue Locate Arrow icon to the right of the Shared Journal Location edit bar



- Navigate to the Shared Area that you wish to store all Networked Notes



- Click on OK

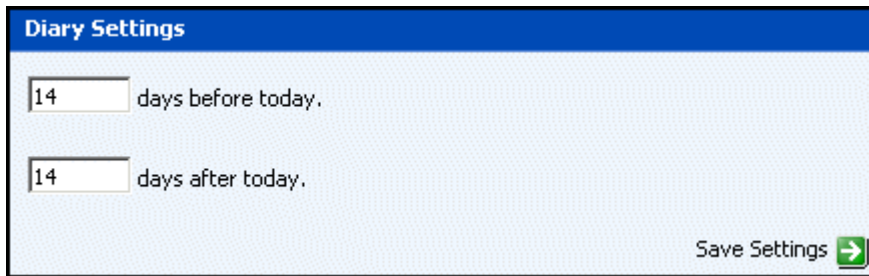
Related Topics:

[Add Notes](#)

Diary Settings

In order to set the templates to the Templates Menu, you must first configure the Document Location.


- Select the **Tools Menu > Configuration**
- Select **Diary Settings** from the left pane
- Select how many days before and after today's date you wish to be able to view entries in the [Viewings Book](#)



Diary Settings

days before today.

days after today.

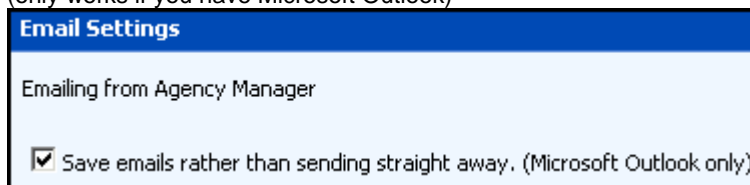
Save Settings 

- Click on 'Save Settings'

Email Settings

In order to set the templates to the Templates Menu, you must first configure the Document Location.

- Select the **Tools Menu > Configuration**
- Select **Email Settings** from the left pane
- Select the 'Save Emails....' tick box if you wish to save them rather than sending straight away (only works if you have Microsoft Outlook)



Email Settings

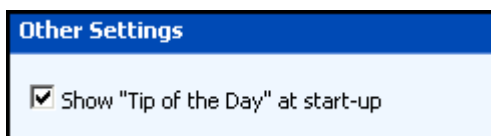
Emailing from Agency Manager

Save emails rather than sending straight away. (Microsoft Outlook only)

Other Settings

In order to set the templates to the Templates Menu, you must first configure the Document Location.

- Select the **Tools Menu > Configuration**
- Select **Other Settings** from the left pane
- Select the 'Show tip of the day' tick box if you wish to show a tip of the day when you start Agency Manager



Other Settings

Show "Tip of the Day" at start-up

Templates

About Templates

Agency Manager comes complete with Templates for easy use and effective marketing and contracts. There are templates for Window displays, mail-outs, standard contracts and also the ability for you to alter the templates created or add your own templates quickly and easily.

Templates are classified in four main categories - Applicants, Contacts, Sales Pipeline and Properties. This ensures that the number of templates that you search through is restricted to only those that can be used from that window.

As part of Agency Manager's commitment to you, these will be ever increasing to ensure that you have a full collection of templates to run your office efficiently. Also, you are not restricted to using just the templates that are created for you, Agency Manager has built in capability to allow you to create or add templates that you create yourself.

NOTE: If you choose to use the templates that are built in to Agency Manager, it is YOUR responsibility to ensure that you have checked them and altered them accordingly. Digital Wired Limited (Agency Manager) takes no responsibility for templates used by the Agent.

Using Templates


Templates have been classified into four categories: Applicants, Properties, Contacts and Sales Pipeline. Within each of these categories are the templates relevant for that category.

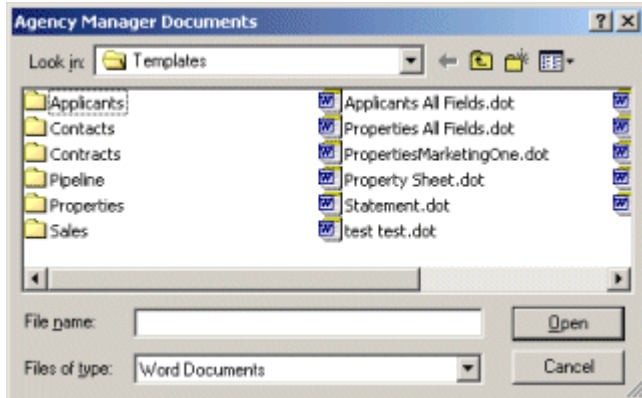
All templates are created in conjunction with Microsoft Word, in order for templates to work you must have a version of Word installed on your machine.

The templates are categorised in the following way:

- Applicants -
Applicant Standard Letters
Delete Record Letter
- Properties -
Property Marketing
Window Cards
Vendor Contracts by Agency Agreement type
Vendor Standard Letters
- Contacts -
Contact Standard Letters
- Sales Pipeline -
Exchange Contracts
Completion Contracts
Exchange Standard Letters
Completion Standard Letters
- Select the relevant button from the [Navigation Pane](#) (Applicants, Properties, Contacts or Sales Pipeline)
- For single property templates or contracts, ensure that you are viewing the record of the client that you wish to create a document for
- For multiple property templates, see [Marketing](#)
- Select the Templates menu
- Select the template you require
- A new window will open with information being added from the record to the template.

Alternatively:

- From the record that you wish to create a document, Click on the  icon from the navigation pane
- Select the Template folder from which you wish to create a document



- Select the Template
- Click on Open
- A new window will open with information being added from the record to the template.

Create Templates

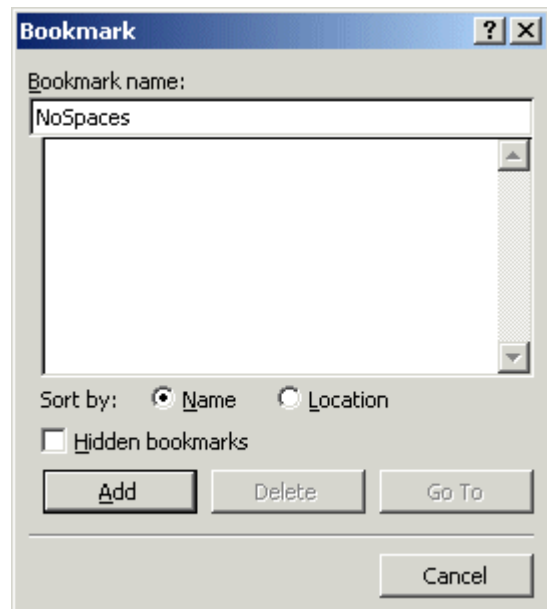
You can create your own templates to add to the Agency Manager Templates.

- Create the layout, and enter the text for the template in a new document in Microsoft Word
- Insert bookmarks for the fields that you would like information from the database to populate - the bookmark names **have** to be the same as the headings in the database columns (you can download a list of Field Names for version 3x from www.agencymanager.co.uk/sdk.asp)
- If you need to enter the same field bookmark on more than one occasion, ensure that you add a suffix at the end of the bookmark name (1, 2, 3, etc)
- Save the document as a template ensuring that you save the file to the templates folder of Agency Manager.

Inserting Bookmarks

Bookmarks are inserted into Microsoft Word (as this is what the templates are created in).


- Open Microsoft Word
- Place the cursor where you wish to insert the bookmark (this can be over a word, which needs to have been selected first)
- Select Insert > Bookmark
- Enter name for Bookmark (cannot have any spaces between the words)
- Click on Add



Edit Templates

Because the templates are created in conjunction with Microsoft Word, you can edit the templates to suit your requirements. By editing you can, amongst other things:


- Add your own Company headers and footers
- Change text on standard contracts to suit the way you work
- Format photos
- Format text sizing and type
- Format styles
- Open Windows Explorer
- Locate the template that you wish to Edit (will usually be found in c:/Program Files/Agency Manager 3.0/Templates)
- Right click on the template name > Select Open
- Edit the template as required
- Click on the Save icon or select Save from the file menu

 If you delete any fields that are in the template (denoted by square brackets []) they will not accept information from the record. You will need to re-enter the bookmark

Edit Documents

Because the documents are created in conjunction with Microsoft Word, you can edit the documents to suit your requirements. By editing you can edit individual documents created by, amongst other things:

- Add your own Company headers and footers
- Change text on standard contracts to suit that document
- Format photos
- Format text sizing and type
- Format styles
- Run the template
- In the new document window that has been created, make any changes required to the document

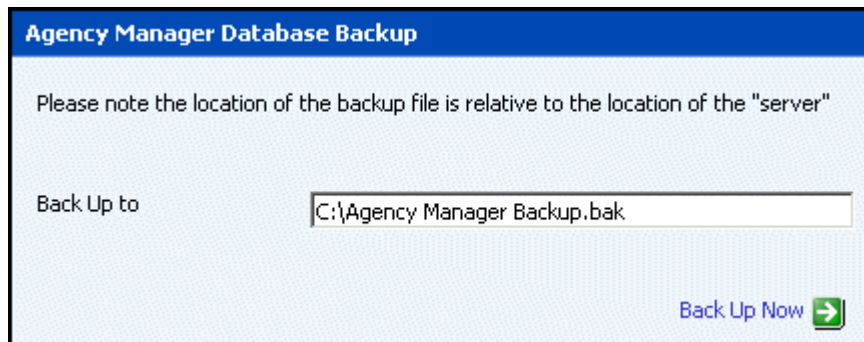
 Because you are editing the document as opposed to the template - any changes that you make do not affect the template **just** the document that you are working in.

Database

Database Back-Up

Backing up your database on a regular basis ensures that you always have a copy of your database in case your original copy is corrupted.

- Select **Start > Programs > Agency Manager Professional > Agency Manager Management Console**
- Select **Database Backup** from the left pane
- The Location of the Backup is set as a default of the location of the "Server"



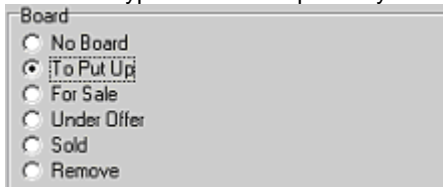
The screenshot shows a dialog box titled "Agency Manager Database Backup". Inside the dialog, there is a message: "Please note the location of the backup file is relative to the location of the 'server'". Below this message, there is a label "Back Up to" followed by a text input field containing the path "C:\Agency Manager Backup.bak". In the bottom right corner of the dialog, there is a button labeled "Back Up Now" with a green right-pointing arrow icon.

- Click on 'Back Up Now'

Property Boards

You can select which type of Property Board you wish to put up at a property (if any):

- Select Properties from the [Navigation Pane](#)
- Click on the Property Details tab
- Select the type of Board required by clicking into the radio button next to the type.



- To change the status of the board required, simply select the new status required.

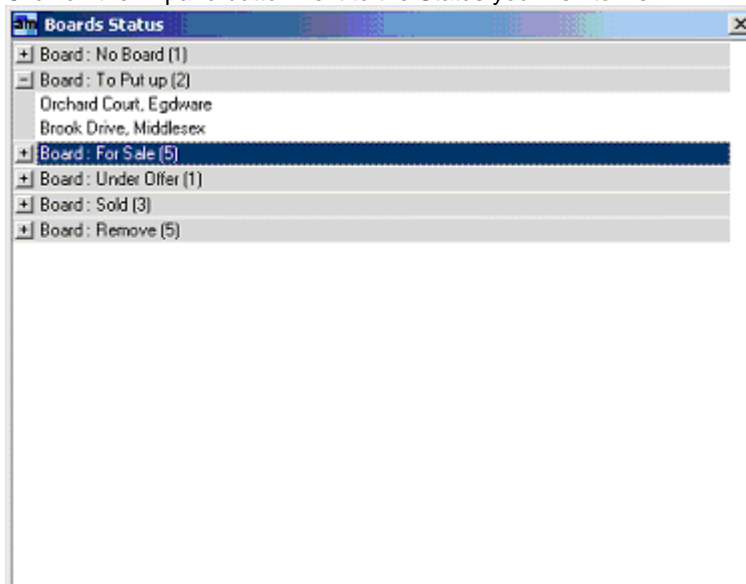
View Status of Property Boards

To view status of all property boards

- Select Properties from the [Navigation Pane](#)
- Click on the 'Boards' icon in the Navigation Pane



- Board Status is grouped by Type of Status.
- Click on the Expand button next to the Status you wish to view **+**



Areas

Add Area


To add an area that the applicant is looking to purchase a property in:

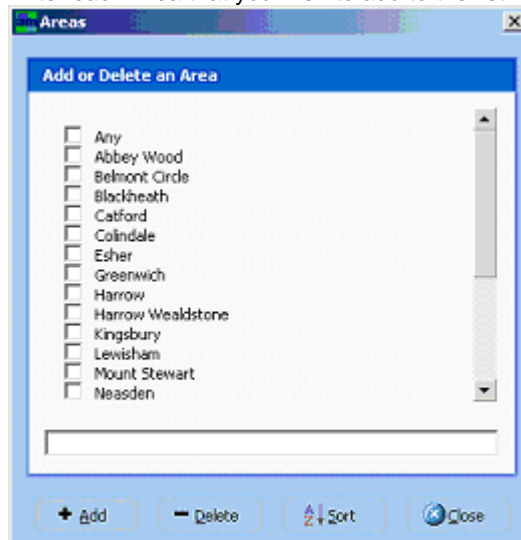
- Click on Applicants in the [Navigation Pane](#)
- Select the Property Details Tab

Either:

- Select the **Tools** menu > **Areas**

Or:

- Click on the Add a new Area icon next to the Areas Required section 
- Enter each Area that you wish to add to the list in the edit bar

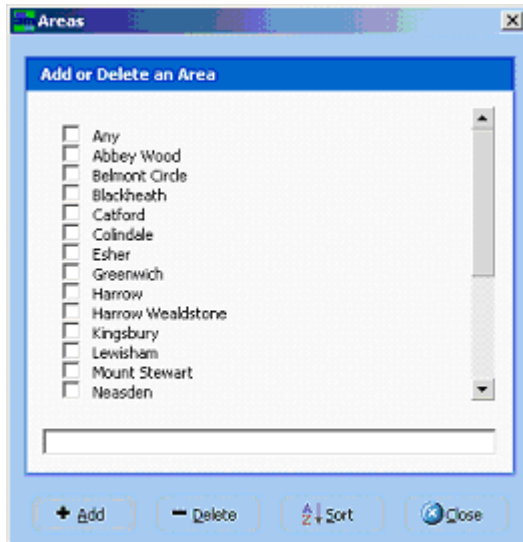


- Click on the Add button after each area is typed
- When all areas to be added have been entered, click on Close

Sort Areas

To sort areas into alphabetical order as they are entered:

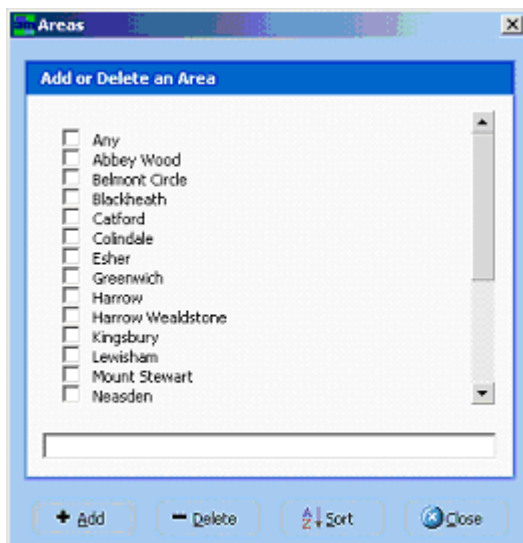
- Click on Applicants in the [Navigation Pane](#)
- Select the Property Details Tab
- Select the **Tools** menu > **Areas**
- Click on the Sort button



- Click on Close to close the Areas dialogue box

Delete Areas

- Click on Applicants in the [Navigation Pane](#)
- Select the Property Details Tab
- Select the **Tools** menu > **Areas**
- Select the Area you wish to delete by clicking in the tick box next to the area (select all that you want to delete)



- Click on the Delete button
- Click on Close to close the Areas dialogue box

Match

Applicant Match

This allows you to Match by bedrooms and price what the applicant requires with what is available on your books. For a more detailed and specific Match, please refer to Advanced Match

- Click on the Applicants Button in the [Navigation Pane](#)
- Click on the Match tab
- All records are matched generically by Price Range and Bedrooms entered in [Property Details](#)
- A list of properties will appear which match the general criteria as described above

Activate Properties Match

In order to match vendors to buyers:

- You have to ensure that the property status is an 'active' status. i.e. On Market or Under Offer - Still Marketable
- Click on Properties from the navigation pane
- Click on the Status tab
- Click on the Status of Sales Process drop-down arrow




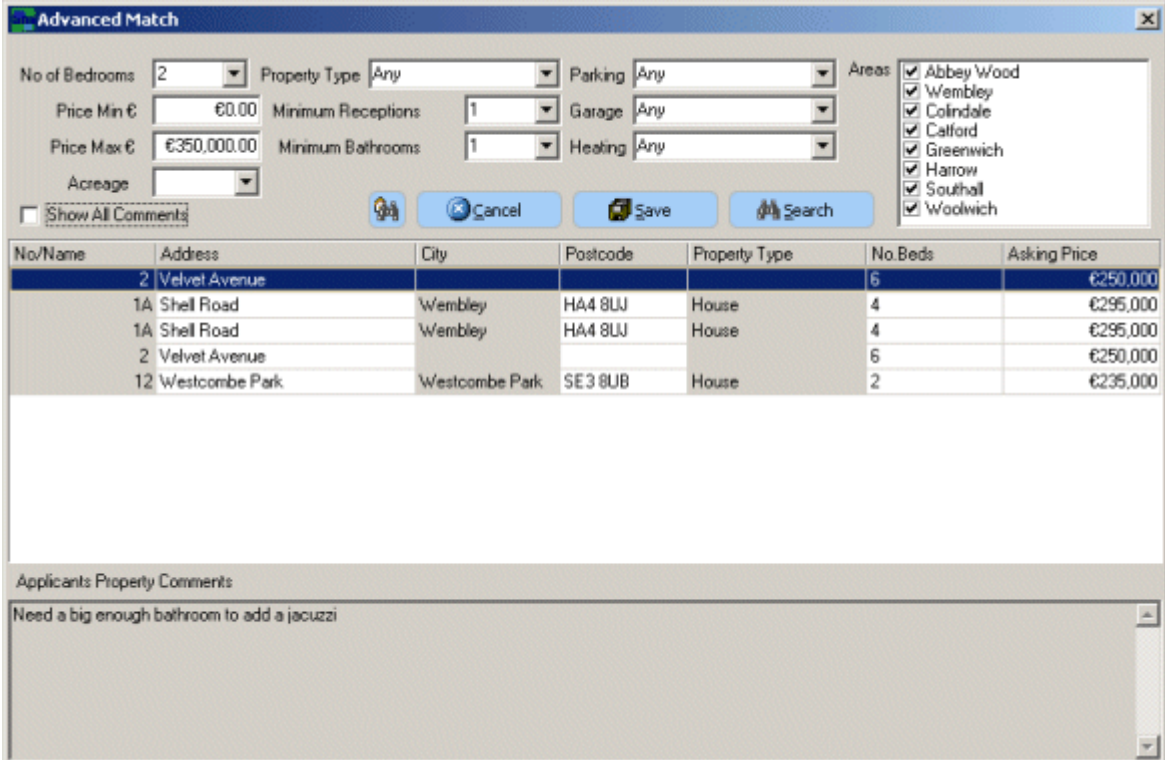
- Select 'On Market' or 'Under Offer - Still Marketable'

Note: You must change the Status before you can start to match applicants to properties

Applicant Advanced Match

To filter more thoroughly the Match criteria of Applicant to Property, you can use the Advanced Match functionality.

- Click on the Applicants Button in the [Navigation Pane](#)
- Click on the Match tab in Applicants
- Click on the Advanced Match Icon on the toolbar 







Advanced Match

No of Bedrooms: 2 | Property Type: Any | Parking: Any | Areas: Abbey Wood, Wembley, Colindale, Calford, Greenwich, Harrow, Southall, Woolwich

Price Min €: 60.00 | Minimum Receptions: 1 | Garage: Any

Price Max €: €350,000.00 | Minimum Bathrooms: 1 | Heating: Any

Acreage: [] | Show All Comments |    

No/Name	Address	City	Postcode	Property Type	No. Beds	Asking Price
2	Velvet Avenue				6	€250,000
1A	Shell Road	Wembley	HA4 8UJ	House	4	€295,000
1A	Shell Road	Wembley	HA4 8UJ	House	4	€295,000
2	Velvet Avenue				6	€250,000
12	Westcombe Park	Westcombe Park	SE3 8UB	House	2	€235,000

Applicants Property Comments
 Need a big enough bathroom to add a jacuzzi

- In order to match applicant to property, all fields must match **exactly**. If you wish not to be so specific on receptions, bedrooms, etc - leave them at a minimum figure and select 'Any' where necessary.
- In order to view Property Comments - ensure the 'Show All Comments' tick box is selected - this will allow you to check Applicant requirements against Property Details.
- Select the required Match details and click on Search


Property Match

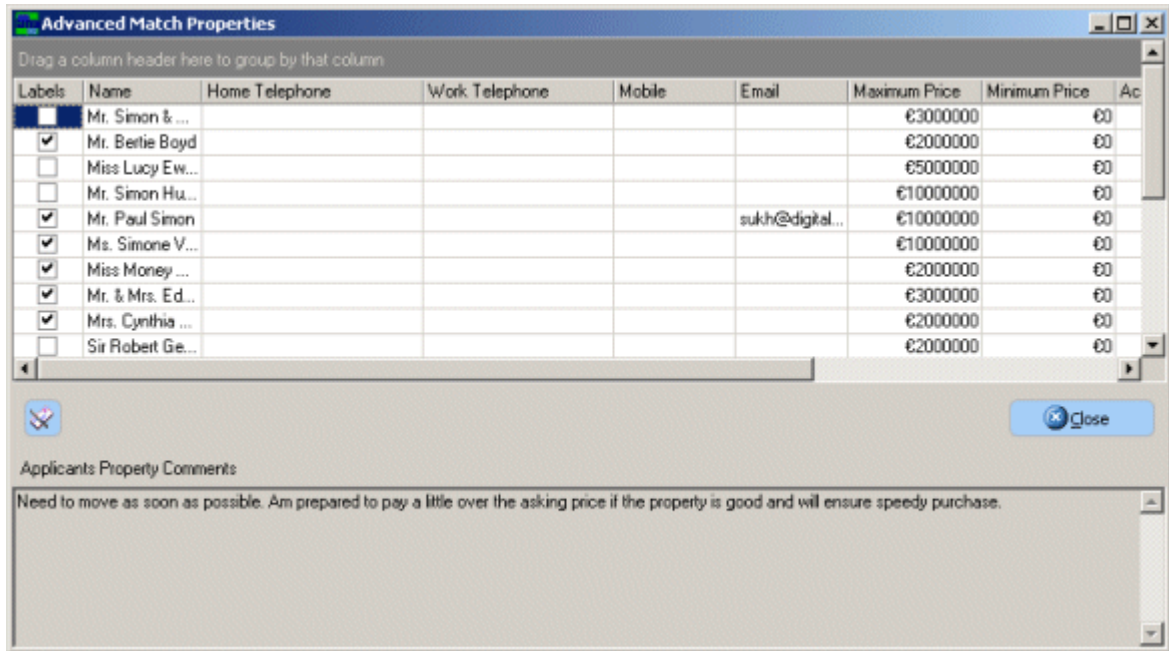
This allows you to Match what is available on your books to what the applicant requires.


- Click on the Properties Button in the Navigation Pane
- Click on the Match tab
- All applicants that are searching for properties that match the details entered in the vendor property details, will be displayed

Properties Advanced Match

Labels allows you to create a Label Print List from the Matched Applicants and Properties.

- Click on the Properties Button from the [Navigation Pane](#)
- Click on the Match tab
- Click on the Advanced Match Icon 
- In the Advanced Match window, you will see displayed a list of all matched applicants.




- Select or deselect applicants from label list
- View Applicant Comments
- Double-click on applicant name to view applicant record
- Click on Labels icon to go to label list 

Notes

Add Notes

Notes allows you to add comments and make notes about a property or applicant in MS Word without necessarily adding it to the record officially.

- How?
- Select Applicants or Properties from the [Navigation Pane](#)
- Click on the Drop Down Arrow on the Notes Icon 
- Select either 'Personal Journal Entry' or 'Workgroup Journal Entry'
- Personal Journal Entry will create a Word document for a property or applicant on your local machine for you to view, edit and amend.
- Workgroup Journal Entry will create a Word document for a property or applicant on your network for everyone to view, edit and amend.
- Once you have added the note, close the document and save it.

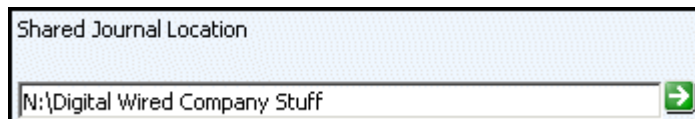
Related Topics:

[Configure Workgroup Journal Entry Location](#)

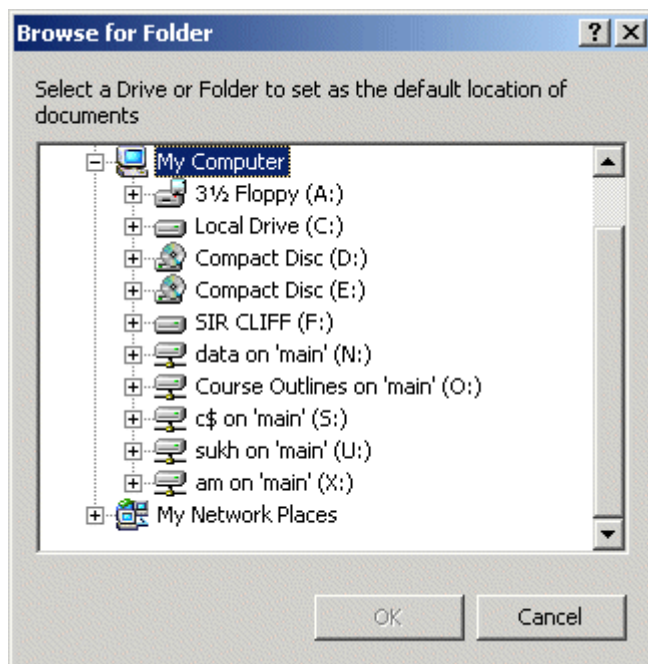
Configure Workgroup Journal Entry Location

Configuring the location allows you to decide where on the server you wish to place the Workgroup Notes Documents

- Select the **Tools Menu > Configuration**
- Select **Template Settings** from the left pane
- Click on the blue Locate Arrow icon to the right of the Shared Journal Location edit bar



- Navigate to the Shared Area that you wish to store all Networked Notes




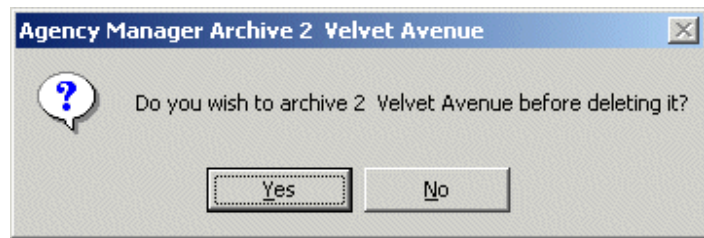
- Click on OK

Archiving Records

Archive Record

You are able to delete records that you have entered in Applicants, Properties and Contacts.

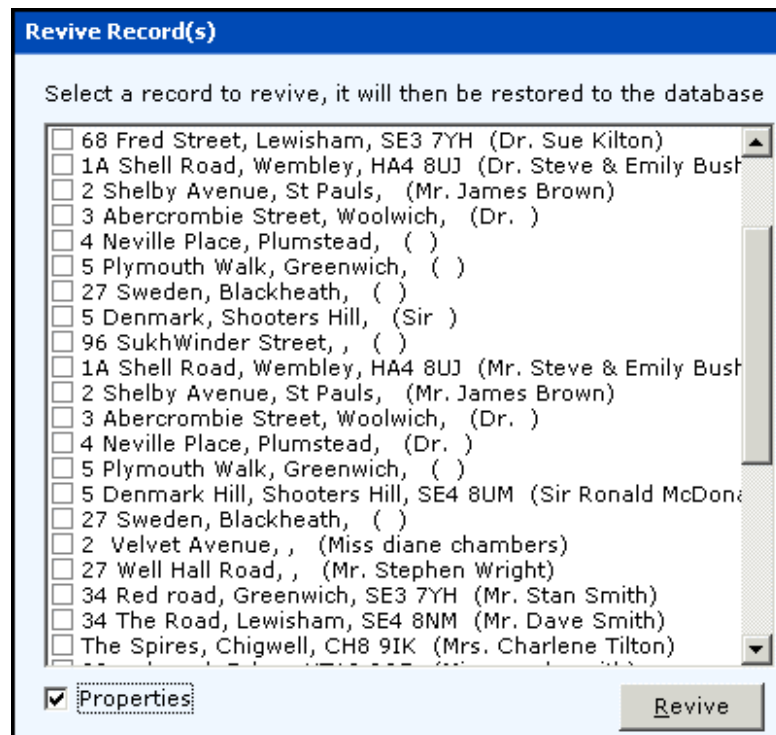
- Select either Applicants, Properties or Contacts from the [Navigation Pane](#)
- Ensure the record that you wish to delete appears on the screen
- Click on the delete icon to delete the record currently displayed on the screen 
- You will be prompted to make sure you do wish to delete - select Yes or No
- You will be prompted to Archive the record for retrieval at a later date. If you wish to Archive Record select Yes (No if you do not wish to Archive).



Revive Archived Record

If you have deleted and Archived a record - you may need to retrieve that record.

- Select **Start > Programs > Agency Manager Professional > Agency Manager Management Console**
- Select **Revive Records** from the left pane



- Select all records that you wish to revive back into Agency Manager - These are Applicant details only
- For Property details that you wish to revive - Select the Properties Tick box
- Click on Revive

Miscellaneous

Print Screen:

- Select the **File** menu > **Print**
- Select **Print Screen**
- Select the number of copies required & whether you wish to Collate the copies
- Click on OK

Change Negotiator

By default, Agency Manager uses the Current User details as the Negotiator details. However, on occasions you may wish to change the Negotiator name.

- Select the **Tools** menu
- Select **Change Negotiator**





- The current negotiator's name will appear in Current Negotiator in the format that is entered into the Agency Manager Registration details.
- Click into the New Negotiator edit bar
- Type in new name, in the format that you want the name displayed on letters, contracts, etc (e.g. first name and surname)
- Click on OK


First, Prior, Next, Last Record


To view records in your Applicants, Properties or Contacts database:

- Select either Applicants, Properties or Contacts from the [Navigation Pane](#)
- Click on either the First, Prior, Next or Last icon

 **First** - Will take you back to the first record in the Section you are in (i.e. Applicants, Properties, Contacts)


 **Prior** - Will take you back to the previous record

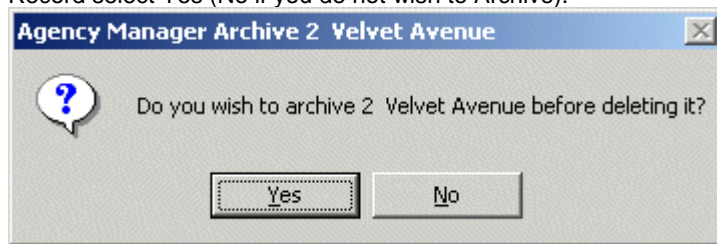
 **Next** - Will take you to the next record

 **Last** - Will take you to the last record

Delete Record

You are able to delete records that you have entered in Applicants, Properties and Contacts.

- Select either Applicants, Properties or Contacts from the [Navigation Pane](#)
- Ensure the record that you wish to delete appears on the screen
- Click on the delete icon to delete the record currently displayed on the screen 
- You will be prompted to make sure you do wish to delete - select Yes or No
- You will be prompted to Archive the record for retrieval at a later date. If you wish to Archive Record select Yes (No if you do not wish to Archive).



Agency Manager Support

Agency Manager Support is available during normal working hours from our fully trained Help Desk Support Staff.

To sign up for the telephone support line, either phone us now on **01372 470 740**, or visit the website at www.agencymanager.co.uk/support.asp

Subscription to the Support Desk will also entitle you to **free** future upgrades to Agency Manager. Some of the planned upgrades include: Full Lettings Management System, One-click upload to Property Portals on the web, full integration with Financial applications such as Sage, multi-branch synchronisation and hand-held technology to allow one-time input of information only. Without subscription, you will have to pay for all future upgrades if required.

Remember, Phone us now to subscribe: **01372 470 740**

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