Branch Administrator

User Guide

FINDSPACE

Tuesday, August 17, 2010

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OVERVIEW

Findspace is a website developed to make it easier to find Commercial Real Estate.

Our site is 100% focused on Commercial Real Estate and offers users a number of different listing options, such as:

- **Keep it Simple** – Our base and Free Plan (to the end of 2010)
- **Add More Value** – If you wish to add extra detail and raise its priority to appear at the top of lists
- **Get me Out There** – If you want maximum exposure and wish to appear on the home page and on top of every list
- **Tickle Me** – To list properties that are ***Not for Sale,*** so you can gauge interest
- **Data Feed** – Used exclusively when we are importing data through our API (Agency Property Interface)

ACCOUNT TYPES

With Findspace there are **Four Public User Accounts**. These are:

A **Private Seller** is an individual marketing a property under their own name.

A **Real Estate Agent** is deemed to be a Licensed Real Estate Agent working for a Real Estate Agency. Multiple Agents can exist within one Agency. A person can also use this option to register as a Contact for a Property Investor.

A **Real Estate Agency** is deemed to be a Licensed Real Estate Agency operating under the REA Act 2008. An Agency can have one or many Branches. Each Branch needs to sign up to Findspace in order to market listings under the Branch Name.

Property Investors are private firms marketing their own properties under their Company Name. A Property Investor can have one or many Branches. Each Branch needs to sign up to Findspace in order to market listings under the Branch Name.

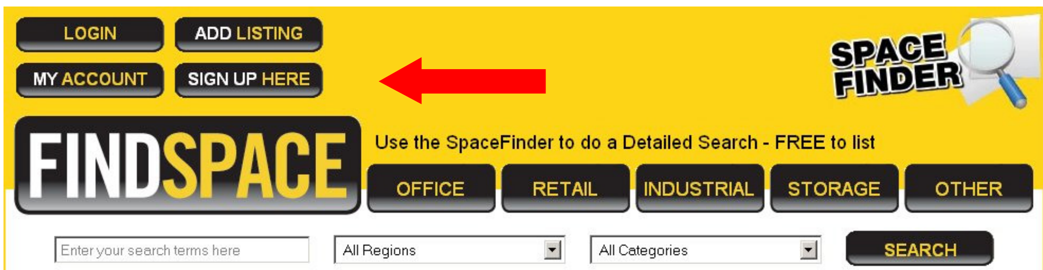
The **Branch Administrator Account** is a non Public Account that is structured under Real Estate Agencies and Property Investors Accounts.

GETTING REGISTERED AS THE BRANCH ADMIN

There are only two ways of becoming registered as a Branch Admin.

1. When initially signing up to Findspace as an Agency or Property Investor the person who creates the account is given Branch Admin status by default.
2. By e-mailing info@findspace.co.nz and requesting Branch Admin status for someone who has already signed up as an Agent/Contact.

Add a new account under **Sign Up Here**

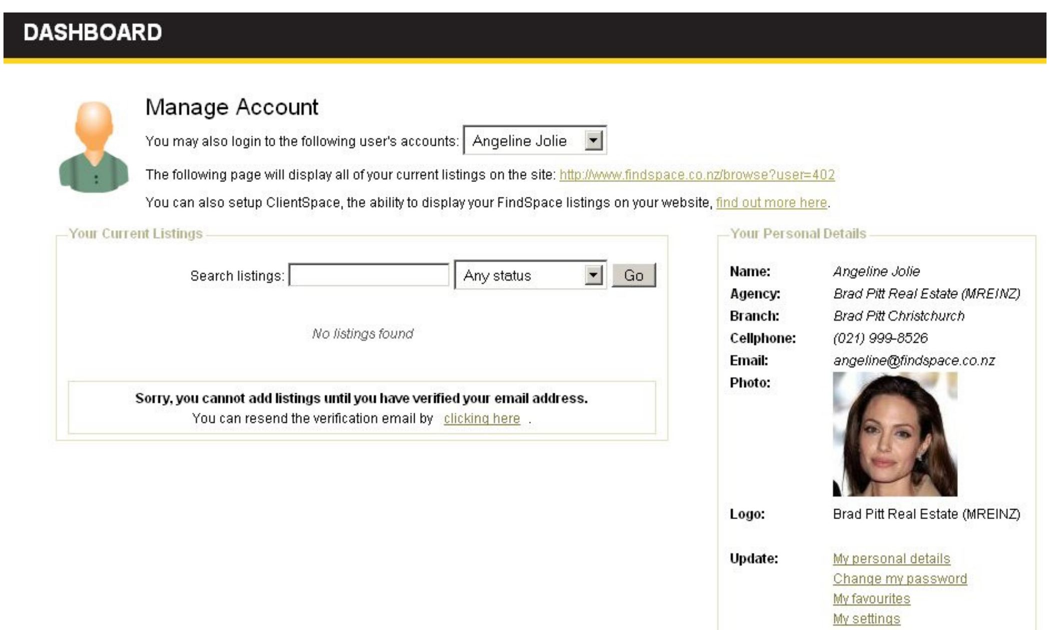


LOGGING IN AS THE BRANCH ADMINISTER

In order to access the Branch Administer **DASHBOARD** you must first Login to Your Account.

Click on 

which will take you directly to your **DASHBOARD** once you login.

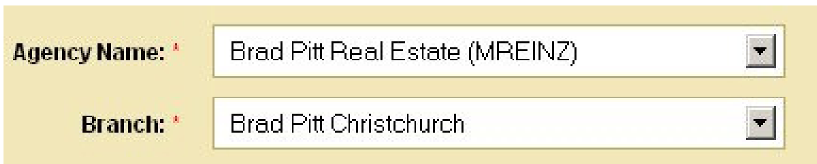


WHAT THE BRANCH ADMIN MUST DO

There are **two** features that the Branch Admin must take responsibility for within Findspace:

Add and Maintain Agents

When an Agent **Signs Up,** they select the Agency and Branch they work for. You will receive an e-mail requesting permission to authorize the Agent to your Branch. The Agent cannot add listings until they are authorized by the Branch Admin.

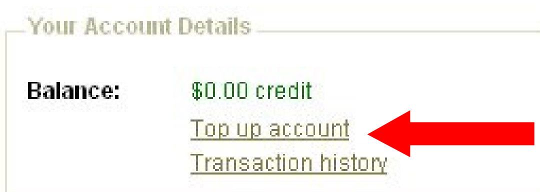


You can add Agents under your login and we can import new agents if using the API.

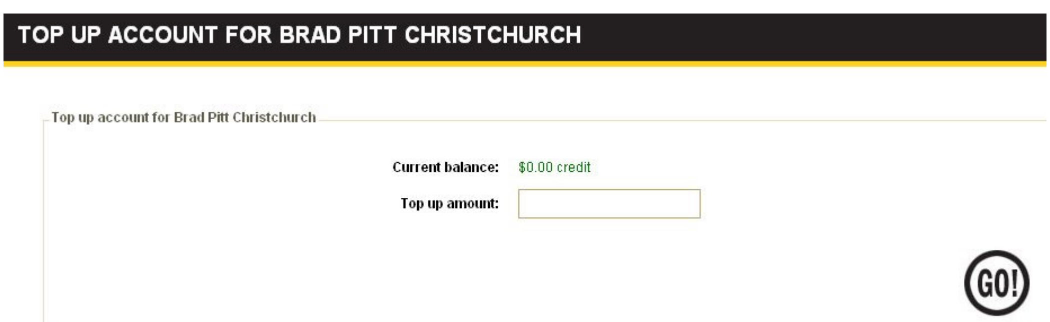
By Authorising the Agent you are giving them permission to trade under your Branch name, and draw down funds from your Branch Account Balance for all paid listings.

Maintain your Account Balance

If you, or your Agents, are uploading paid listings then your account must be in credit before a listing goes live. Only the Branch Admin has the authority to add funds to your Account.



You can pay for individual listings as you go or top up your account as a lump sum.



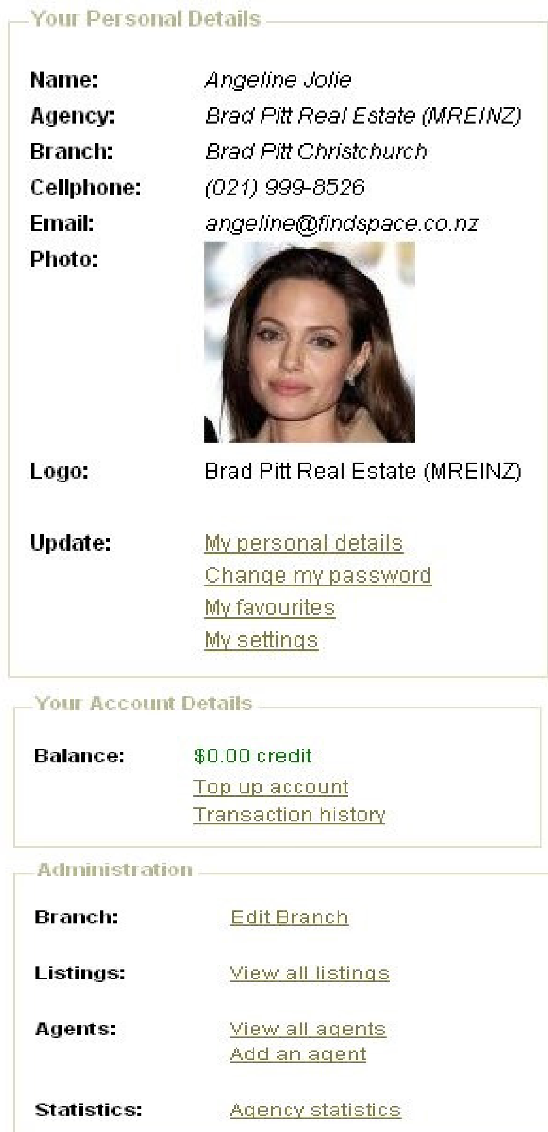
No Credit Card details are stored by Findspace. We use an independent third party to handle credit card payments.

WHAT THE BRANCH ADMIN CAN DO

Apart from those mentioned, the Branch Admin has a number of features only available to them. These include:

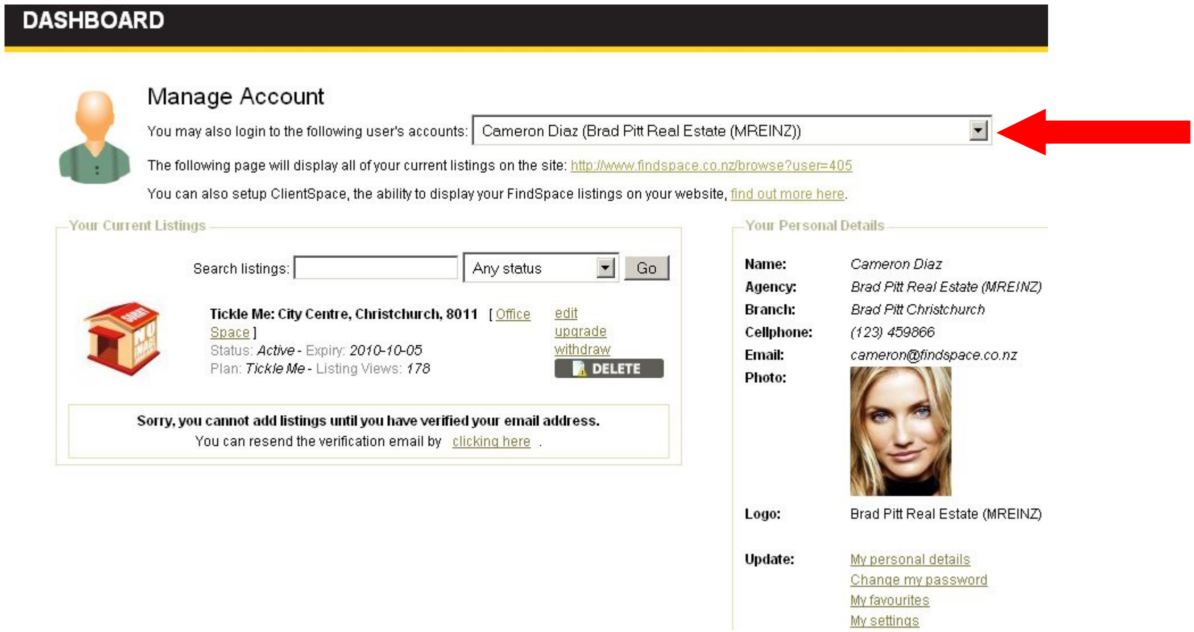
- Review the Agent's details using **Quick View**
- The ability manage all System Generated Messages (such as Expired Listings reminder e-mails)
- The ability to edit the Branch Details
- The ability to manage all Listings
- The ability to mange all Agents
- The ability to Add Agents
- The ability to view Agency Statistics
- The ability to load their Feed User ID

You will find all of these under your **DASHBOARD**.



Agents Quick View

The first option within the DASHBOARD is the ability to access an Agent's account using Quick View. Select the Agent you wish to review from the drop down box.



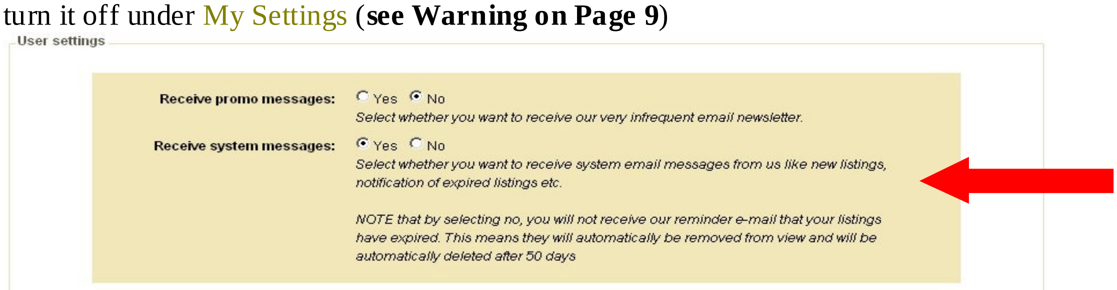
This lets you view the account as if you had logged in as your Agent. From here you can see all their Current Listings. You can use the ***Search listings*** box to search by Keyword (e.g. address) or restrict the view to the options available under ***Any Status***.

These options are:

- Pending Paid (paid listing that has not been paid for yet)
- Expired (all listings expire every 28 days)
- Active (is visible on the site)
- Completed (not in use currently)
- Withdrawn (has been withdrawn but still on the system, not visible to the public but you can still view the listing within the Dashboard)

Under the section – **Your Personal Details** you will see the Agent's details. You can change their **photo**, **phone numbers, password, favourites** and **settings**. You can also add a Feed Linked ID if using a Data Feed.

If your Agent has requested not to receive Expired Listings reminder e-mails, you can turn it off under My Settings (**see Warning on Page 9**)



System Generated Messages

To return to your **DASHBOARD**, just click on MY ACCOUNT

Now the **Personal Details** relate to you (the Branch Admin). Here you can change your personal details, change your password and view your favorites (searches and bookmarks) and manage Settings in respect to System Messages. It is under Setting that you can elect (as the Branch Admin) to receive all system generated messages that are sent to your Agents such as expired listing reminders.

Your Personal Details

Name:	*Angeline Jolie*
Agency:	*Brad Pitt Real Estate (MREINZ)*
Branch:	*Brad Pitt Christchurch*
Cellphone:	*(021) 999-8526*
Email:	*angeline@findspace.co.nz*
Photo:	
Logo:	Brad Pitt Real Estate (MREINZ)
Update:	My personal details Change my password My favourites My settings

Under My Settings you will find this screen

User settings

Receive promo messages: ○ Yes ◉ No
Select whether you want to receive our very infrequent email newsletter.

Receive system messages: ◉ Yes ○ No
Select whether you want to receive system email messages from us like new listings etc.

Branch admin settings

Receive user system messages: ○ Yes ◉ No
Select whether to receive system messages from your branch users.

The User Settings refer specifically to you, whereas the Branch Admin Settings refer to all Agents attached to your Branch.

Under User Settings you can elect to turn off/on settings for our E-mail Newsletter and any ***System Generated Messages***, such as notification of your expired listings.

If you select **Yes** under the Branch Admin Settings this will forward a **copy** of all System Generated Messages to you to administer.

Individually, an Agent can elect to turn off these messages. However by leaving the settings on the Agent gets their System Generated Messages and you get a copy of your Agent's messages which can provide a regular reminder to your Agents of what properties they have listed.

WARNING – If you both select NO to System Messages then neither of you, or your Agents, will receive any reminders that listings have expired. This means they will automatically be removed from View and will automatically be deleted after 50 days.

The Default settings for this feature are:

1. The Agent receives all System Generated Messages related to their Listings.
2. The Branch Admin does **NOT** receive any System Generated Messages that relate to their Agents.

If you wish that only the Branch Admin receives System Generated Messages you must:

- Select Yes on the Branch Admin Settings on your DASHBOARD
- Select No under each Agent's DASHBOARD

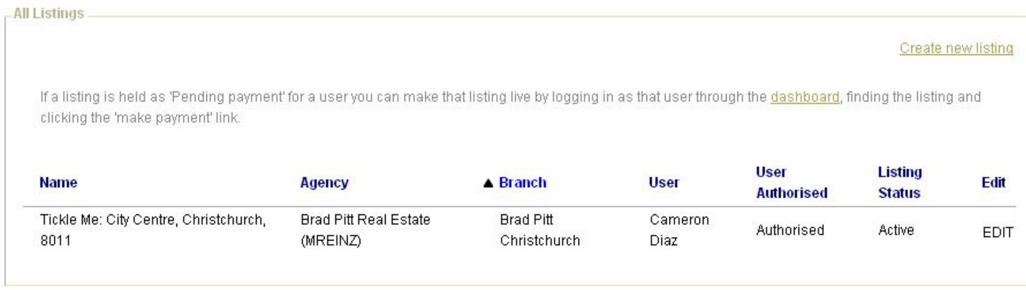
Under **Administration** you can Edit Branch details, View all listings, View all agents and Add an agent and see Agency Statistics.

Manage Branch Settings

Under Edit Branch you can maintain all details that relate to your Branch, such as phone and address details, logo's etc.

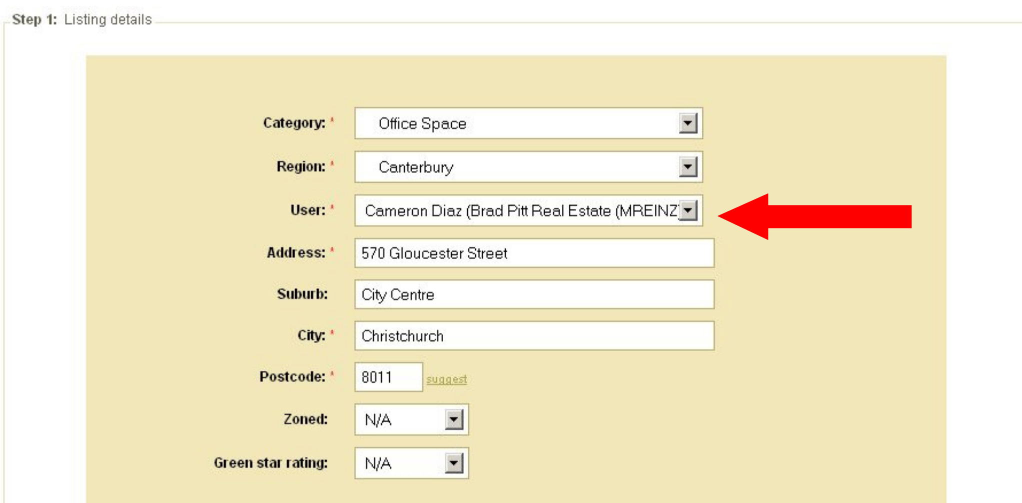
View All Listings

This section lets you view all listings in a table format. You can easily see who a listing is attached to and the status of the listing. You can sort by any column by clicking on the column's name. A small ▲ (ascending) will appear and the data will sort accordingly. To change the sort order just click again on the arrow and it will change to ▼ (descending).



From within this screen you can also Create a new listings and **view** or **edit** any of the existing listings. To view a listing, just click on it under any heading except **Edit**.

To edit a listing click on **EDIT**. This will allow you to change every detail, you can even change the Agent attached to the listing under the **User** field. This can be very useful if an Agent leaves and you need to reassign the listing to a new Agent.



View all Agents

This section lets you view all Agents in a table format. You can sort any column by clicking on the column name.

Agent / Vendor list

Create new agent

	Name	Agency	Branch	Email	Branch Authorised	Delete this user
	Angeline Jolie	Brad Pitt Real Estate (MREINZ)	Brad Pitt Christchurch	angeline@findspace.co.nz	Authorised	Delete
	Brad Pitt	Brad Pitt Real Estate (MREINZ)	Brad Pitt Christchurch	brad@findspace.co.nz	Authorised	Delete
	Cameron Diaz	Brad Pitt Real Estate (MREINZ)	Brad Pitt Christchurch	cameron@findspace.co.nz	Authorised	Delete
	Tom Cruise	Brad Pitt Real Estate (MREINZ)	Brad Pitt Christchurch	tom@finspace.co.nz	Authorised	Delete

You can Delete an Agent but before your do you should make sure there are no listings still attached (see View all Listings to reassign listings to Agents).

You can also Create a new agent from this screen.

If you are using our Data Feed and manually loading Agents then you must enter a **Feed Linked ID** for each Agent. This is done under their Personal Details.

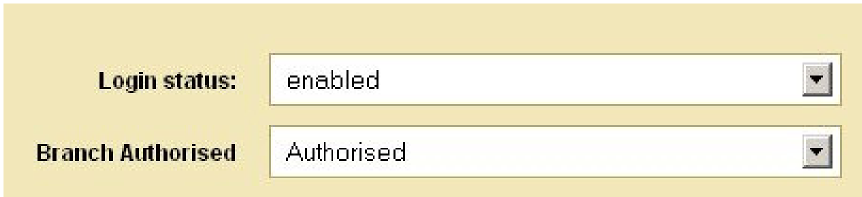
Feed linked id: 244HST

The format is *CompanyIDAgentID* so can differ in format to the above. The Company ID will be the same across the whole Company but each Branch may use a different format for their Agents, some are Alpha, some are Numeric. Have a look at an existing Agent to see what the format is for your Barnch.

Authorise a New Agent

If you have received an e-mail instruction you that an Agent has Signed Up to your Branch, you must Authorise them before they can add a listing (Note - This is not required if we are importing listings via our API).

Just select the Agent from the Agent / Vendor List above to Edit them. Scroll down to the bottom of the form and you should find:



Set **Login Status** to ***disabled*** or ***enabled*** (disabled will disable the users account)

Set **Branch Authorised** to ***Authorised*** or ***Not Authorised*** (Authorised will allow the user to manually Add Listings under your Branch Name).

Agency Statistics

This section will give you statistics in relation to the number of views all your Branch listings have received. You can sort the data by either **Category** or **User**.

Stats

Agent name	Views
Cameron Diaz	175
Total	175

The screen above shows the total number of views/clicks all Cameron Diaz's listings have received. You can click on here name to Drill Down to see individual listing views as per the screen below.

Stats

Agent name	▲ Listing name	Views
Cameron Diaz	Tickle Me: City Centre, Christchurch, 8011	175
Total		175

In order to register a click, the user must click down to the listings detail page.