# Training Guide

*A non-technical, comprehensive, user's guide to BDP.*

SMART ESTATE AGENCY SOFTWARE

# Contents:

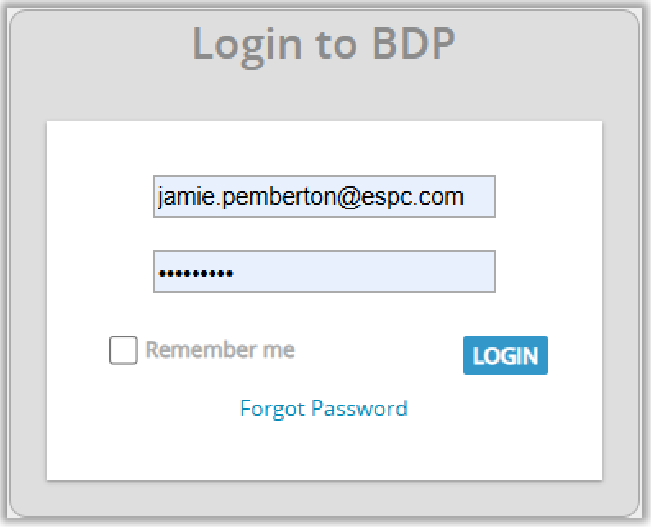
# 1. Introduction

BDP is a CRM platform developed by ESPC (UK) Ltd, designed exclusively to support Scottish solicitor estate agents. This Scotland-focused solution helps firms enhance client relationships, improve efficiency, and deliver an exceptional level of service uniquely suited to Scotland's property market.

## 1.1 Activating your Account

When your account is initially created you will receive an email generated by BDP with a link. Until you click this link, your account will not be active. If you don't receive the email please check your junk mail folder and verify that the message hasn't been blocked by a spam filter.

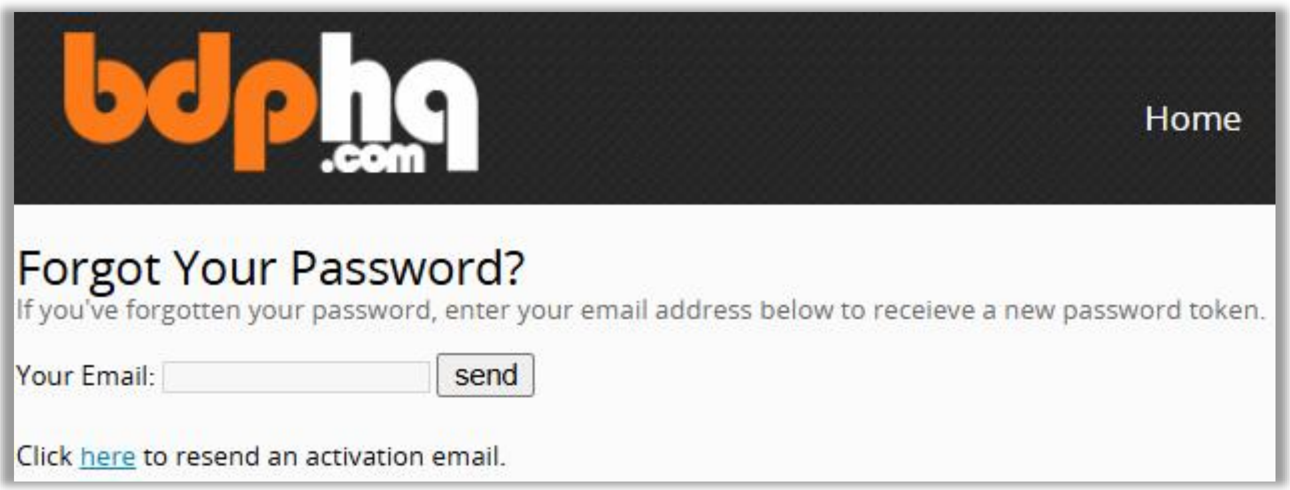
Activation emails can be resent by clicking the Forgotten Password link in the sign-in box. You will then be taken to a page where you can either enter your email address to receive a new password or click the link to resend the activation email.




## 1.2 Loggin in & Resetting a Password

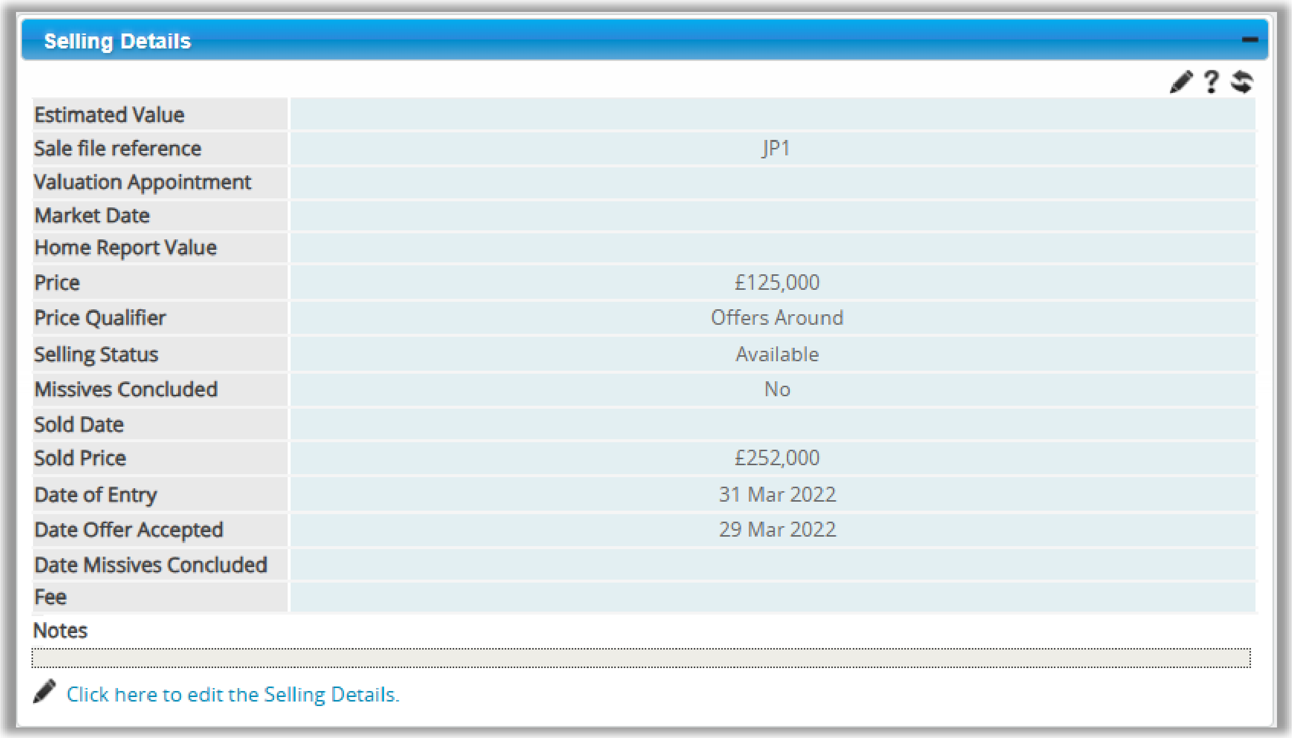
Logging in to BDP is done either via login page at https://bdphq.com/login. Your username is always your email address. Your initial password is set by the administrator who creates your account and is included in the activation email. It is highly recommended that you change your password as soon as possible by using the New password link in the left-hand menu.

If you forget your password use the "Forgotten Password" link in the sign-in box to reset it. Enter your email address into the input box provided, see below:



## 1.3 What is a Widget?

In this document and correspondence with BDP you will hear reference to "Widgets". By Widget we mean the box that contains a group of related information, an example of which is shown below.




Widgets are floating panels that can be opened and closed by clicking on the title bar. They can be moved around the screen into a new order by clicking in the title bar and dragging the widget to a new location. This layout will be stored by BDP against your account.

*The contents of a widget will load on demand, so may take a few seconds to appear depending on the amount of data contained in it.*

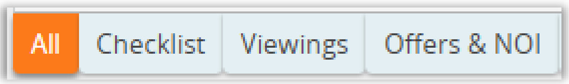
*Closing widgets when finished can help to speed-up the page load time next time you load the page. Widget form fields can vary based on the configuration of your account.*

To edit the contents of a widget, click the Edit (pencil) icon in the top right or the button at the bottom of the widget if provided.

All widgets have a Reset icon - the two circular arrows. To reload the widget or to stop editing without saving your changes, click this icon.

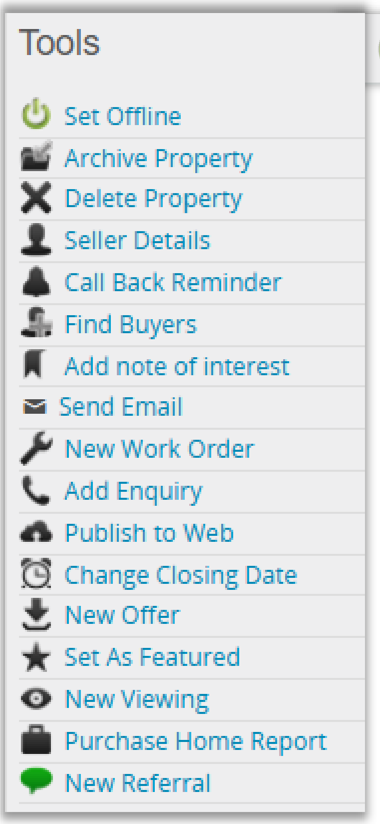
## 1.4 Tabs

Because of the volume of information contained in some screens in BDP it makes sense to break the content up into tabs. See below.




Tabs can be created on an account-by-account basis, see your administrator for details. Tabs are found above the widgets, immediately below the main summary information box.

## 1.5 Toolbars

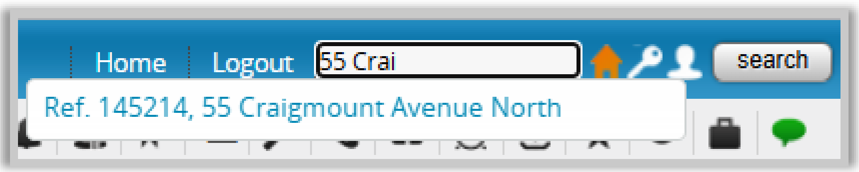



Toolbars are displayed both above the main content area and to the left.

The top tools, which exist as icons only, are a duplicate of the tools provided in the left hand panel.

## 1.6 Header Quick Search

One of the most efficient ways of finding a particular property or contact in BDP is to use the header quick-search. This uses “Type Ahead” technology, meaning that after typing three letters of a street or person’s name, BDP searches for matches and displays them in a list as you type. The more letters you type, the narrower the search. You don’t need to press enter on the keyboard, just click on the entry you want from the list.




To search for sale property, ensure that the sale property icon is active.
To search for people, ensure that the people icon is active.
To search for letting properties, ensure that the lettings icon is active.

Icons to the right of the search box determine the type of search. The ‘house’ icon searches sale properties, the ‘key’ icon searches letting properties and the ‘head’ icon searches the contacts database.

## 1.7 i.bdphq.com

BDP has a dedicated help website where answers to most common and advanced questions can be found. This is accessed at:

http://i.bdphq.com

## 1.8 Support

BDP has a support desk that can be accessed by sending an email to help@bdphq.com. A support ticket will be automatically created for you.

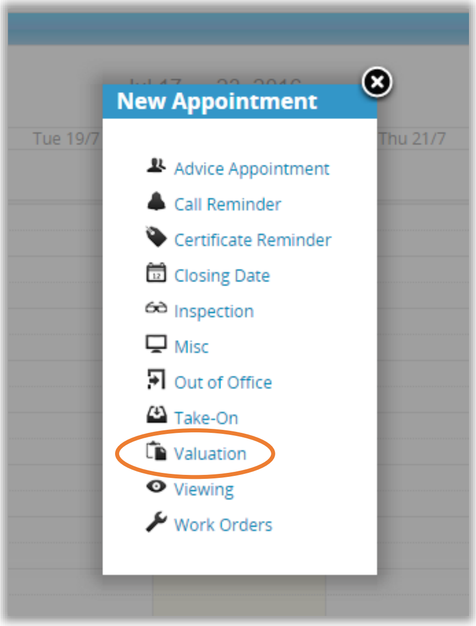
We will respond to all support requests as soon as possible and ask that in the first instance all requests for help are channelled through the support ticket system.

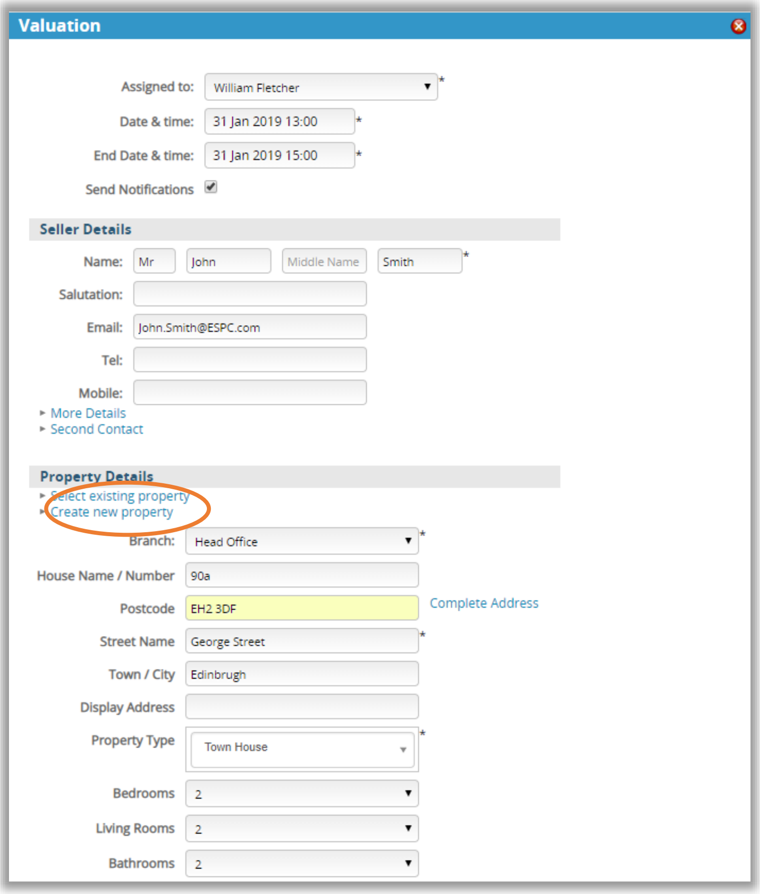
# 2. How to create a valuation appointment

## 2.1 Using The Calendar

From the dashboard, click on the calendar to create a new appointment, then select Valuation.

Complete the valuation form and assign a valuer. Here you can add the seller's details and the initial information about the property; address, number of bedrooms etc.



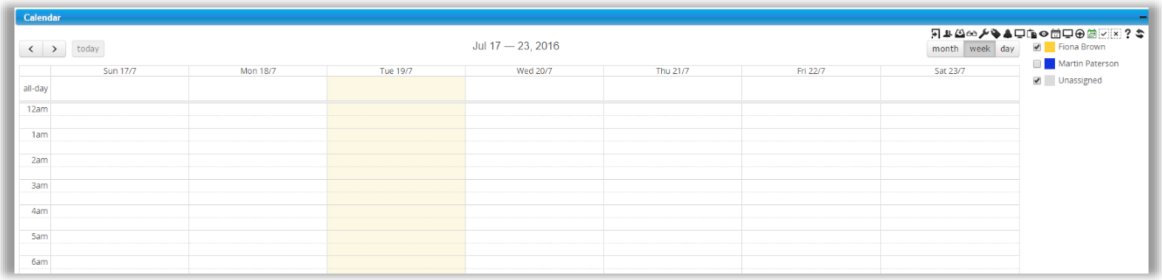

*The form may look slightly different depending on the fields enabled in your settings.*

*Additional individual sellers can be added to the seller contact group at this time or later on, just click on "Second Contact".*

*Additional options are available when creating the appointment by clicking on "More Details".*

The form can either be saved by pressing ‘Save Valuation’ (unconfirmed) & confirmed later or ‘Save and Confirm’ (confirmed). Unconfirmed appointments show as semi-transparent in the calendar and are essentially 'pencilled in'.

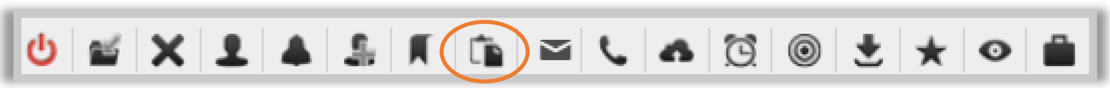

The appointment will now show in the diary & if assigned against the valuer otherwise ‘unassigned'. If the appointment doesn't appear in the calendar, perhaps valuation appointments are not set to show, or your calendar options are not set to show appointments for the specific user. Click the appointment icons in the top toolbar for the calendar to toggle appointment types and tick the users that you wish to see appointments for.




An appointment can be cancelled by clicking on the appointment in the calendar and clicking ‘cancel valuation’.

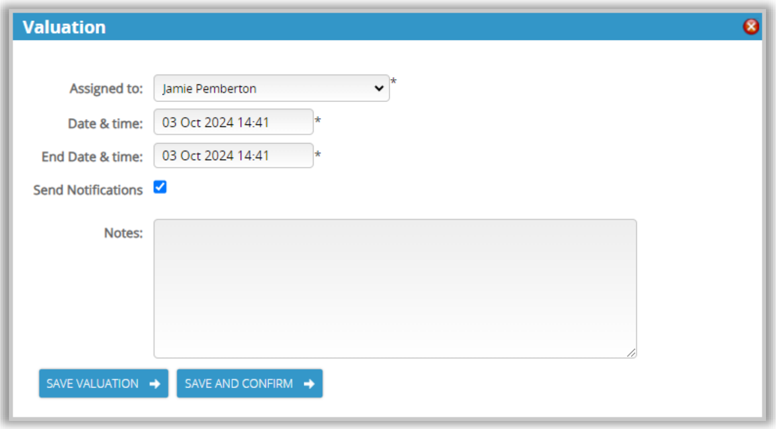
## 2.2 After the Property has been created (see section 2)

A viewing appointment can be booked into BDP using the tools menu at the left hand side of the screen or the same icon at the top right.



This form then appears which allows you to enter the details of the viewing appointment, along with any associated notes.

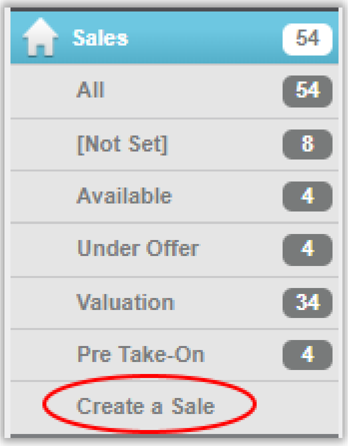
You can decide if any emails related to the valuation appointment be sent.



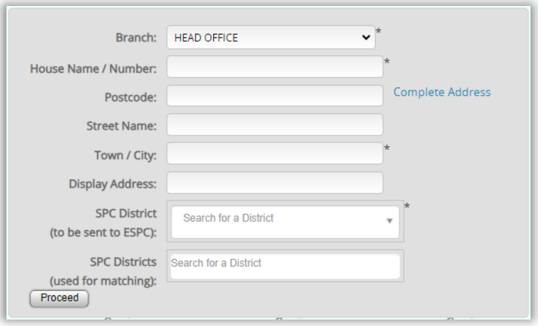
# 3. How to create a property case without a Valuation appointment

**If you do not require to manage valuations via the BDP Calendar a separate process is available.**

a. Click on 'Create a Sale' on the left-hand menu



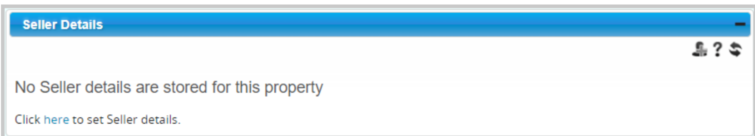

b. Fill in the property details and click 'Proceed'



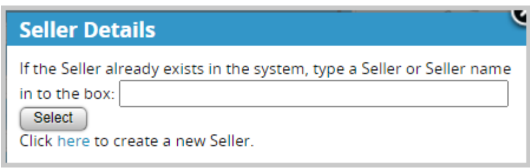

**Note 1:** The District added to the **SPC District (to be sent to ESPC)** will automatically be added to the **Districts (used for Matching)** field.

**Note 2:** Districts add to the **SPC Districts (used for Matching)** field do not feed to ESPC, the ESPC feed only accepts the single District from the **SPC District (to be sent to ESPC)**.

c. Add the seller details

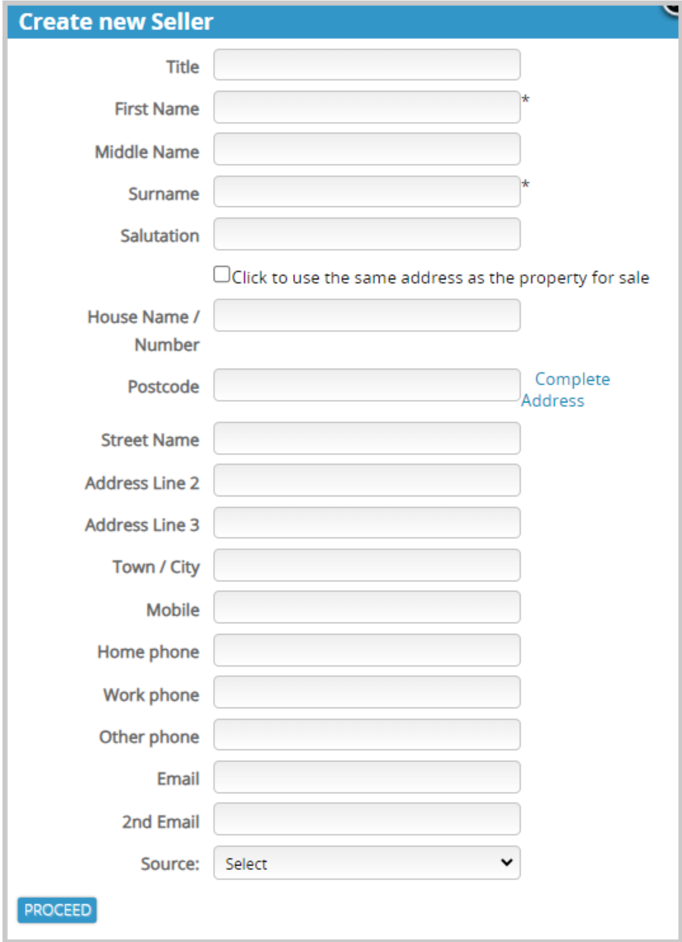



You can create a new Seller Contact Group or choose an existing Seller Contact Group

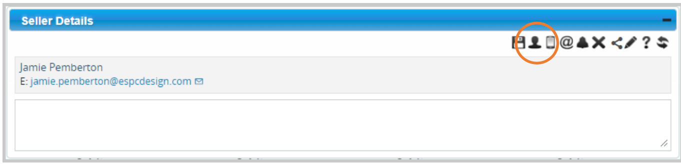


For a new Seller Contact Group complete the form.

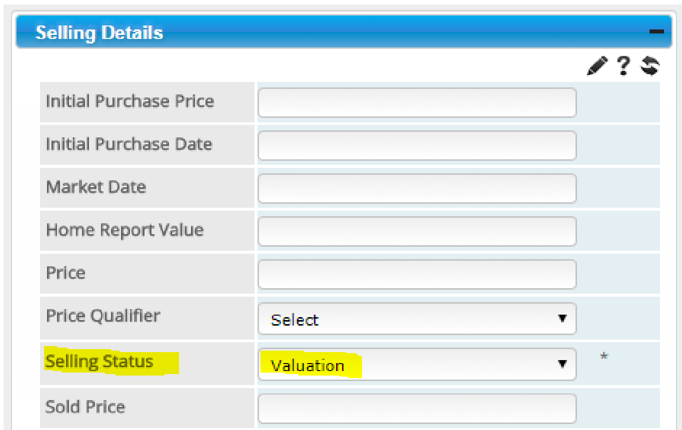
This will allow you to create the Primary/Lead individual in the Contact Group.




You can add additional individuals by clicking on the View Contact button, circled.



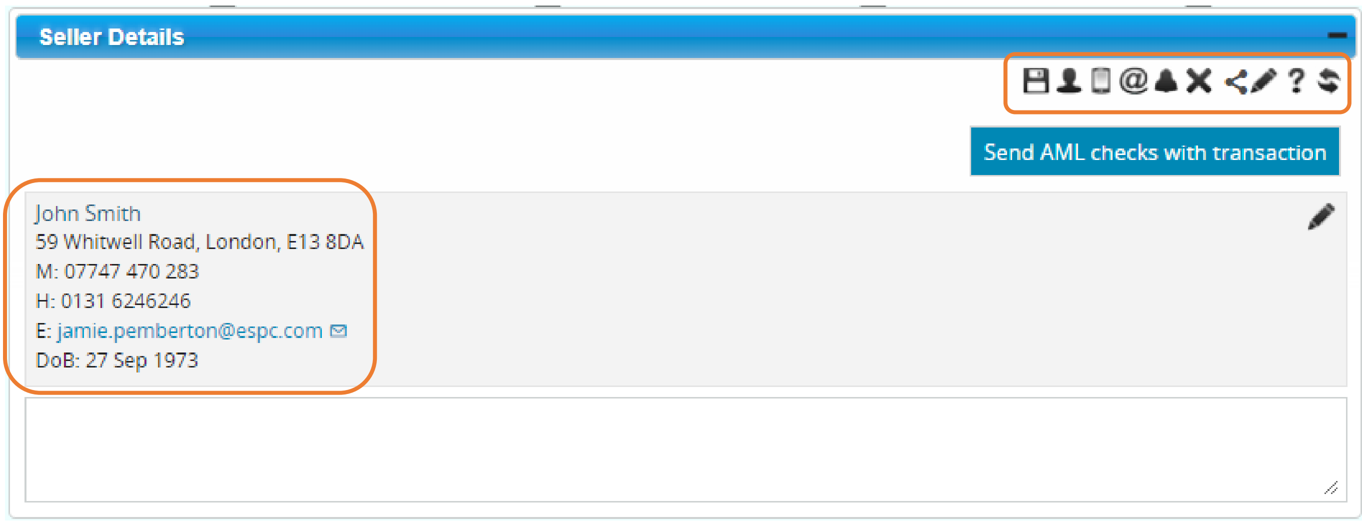

d. Set the Selling Status to 'Valuation'




e. Assign the Valuer

# 4. View property and client Seller Contact Group in BDP

The property is now available to view in BDP. The seller details are recorded when creating the valuation appointment and are stored as the seller of the property. It is also possible to change the Group Salutation in this section by clicking the pencil beside the question mark and entering the name in there. It will default to Owner(s) salutations if it is left blank.




To add an additional individual to the Seller Contact Group, click on the “Head and Shoulders” icon in the tools menu, circled above right; a new tab will open to allow you to edit the Seller Contact Group, knowing exactly what other properties that are connected to that group.

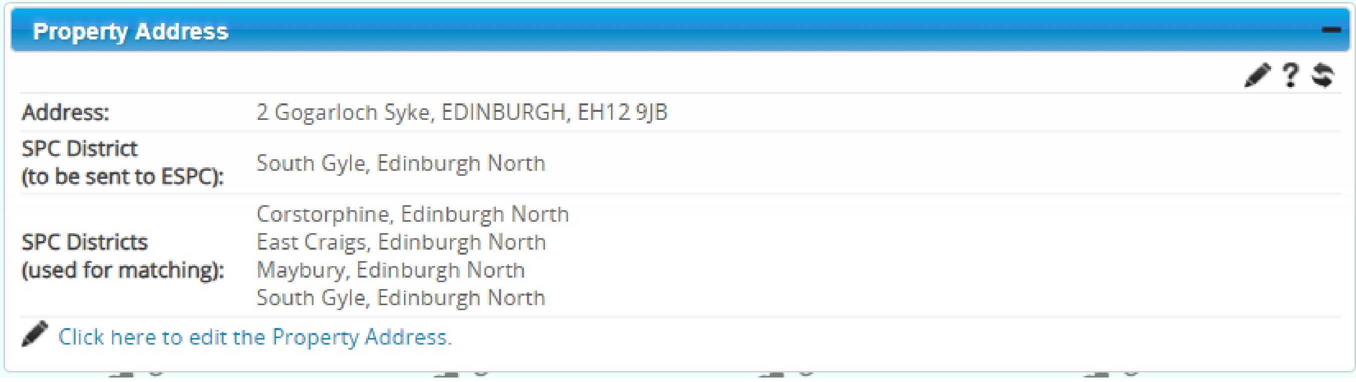
This widget also has the link and access code to the Client Login if you are using this feature. If you are not using LifeQuay, the “Send AML checks with transaction” will not be available.

If you are using LifeQuay you can edit the individuals details, such as adding DoB, gender etc. to enable AML checks to be completed.

If a mobile phone number has been recorded for the seller and you have SMS configured for your firm, you can send an SMS message to the sellers.

# 5. Property Address

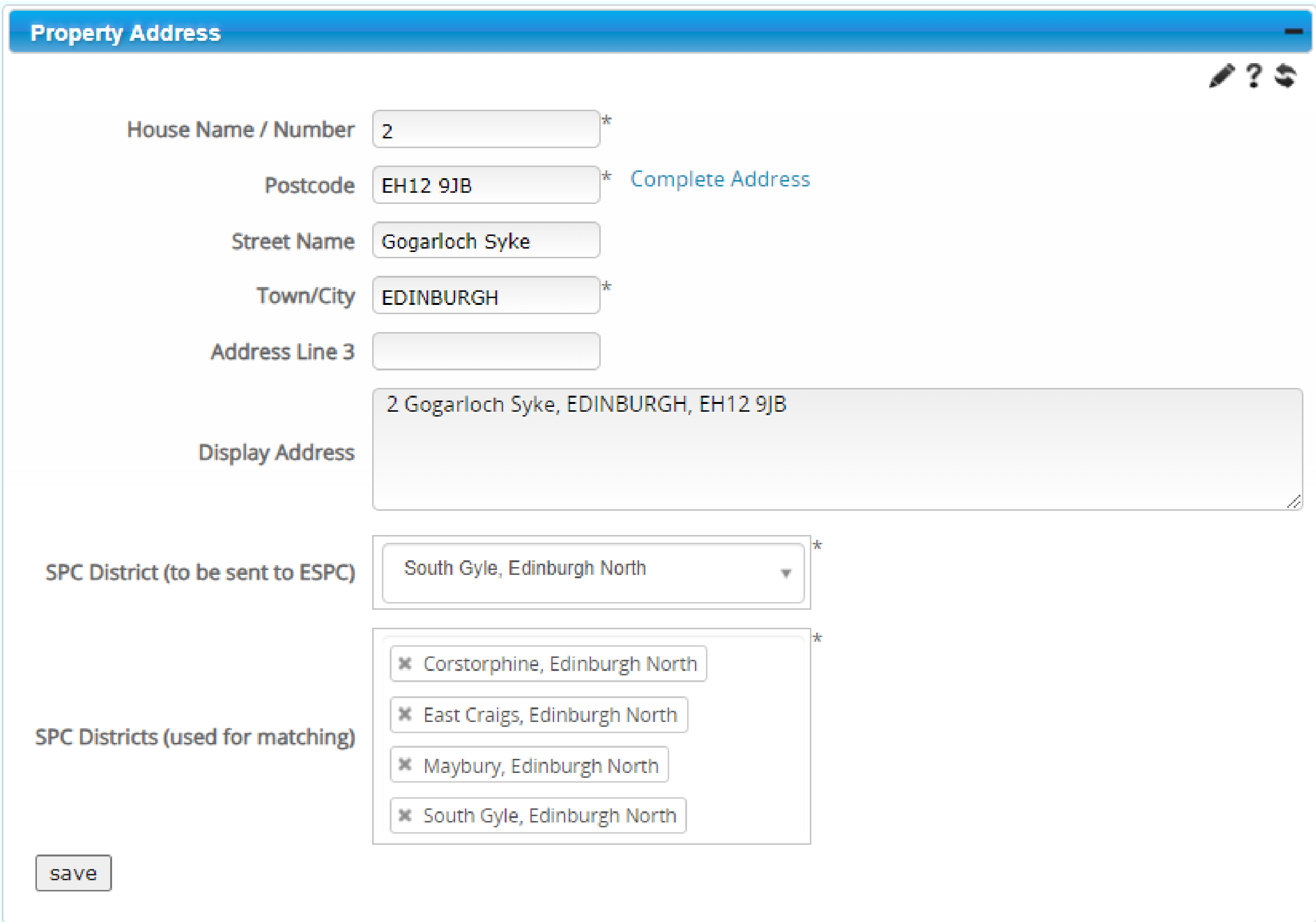
The property address can be updated in the Property Address widget.




Here you can also add the SPC district for ESPC firms. You can also add additional districts to help improve property matching, if you use this facility in BDP. (Please note that these additional districts do NOT feed to ESPC).

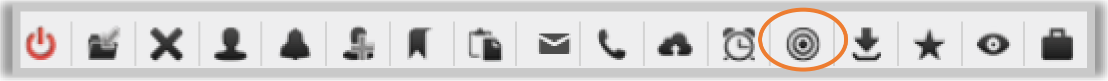
Please note that some portals use the Google Maps marker to obtain the latitude and longitude of the property and assign the district, see Google Maps widget section to learn how to amend the Google Maps marker.

If your client wishes their property address to appear differently online to that which Google provides, this can be amended in the Display address section.

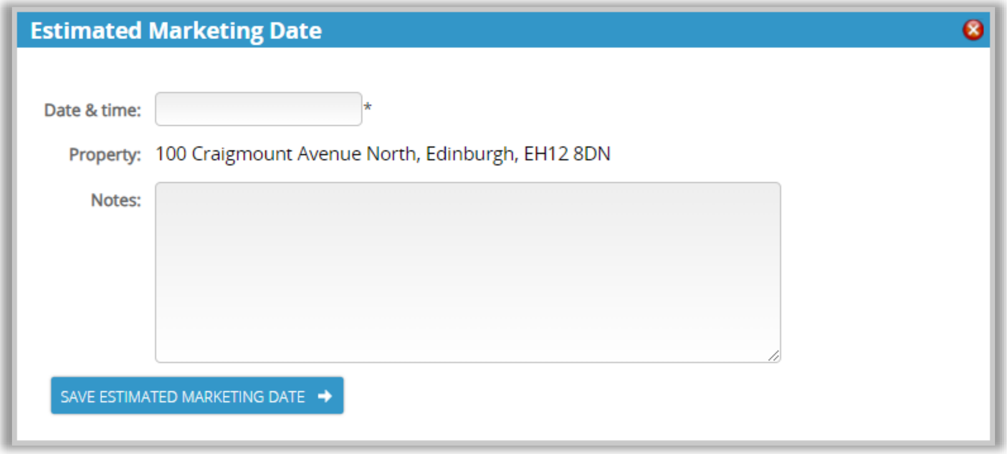


## 6. Estimated Marketing Date

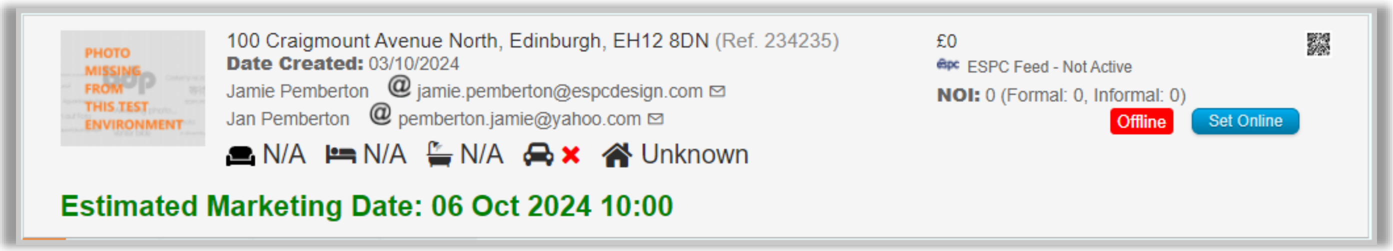
An estimated marketing date can be set on a property using the tools menu at the left hand side of the screen or the same icon at the top right.



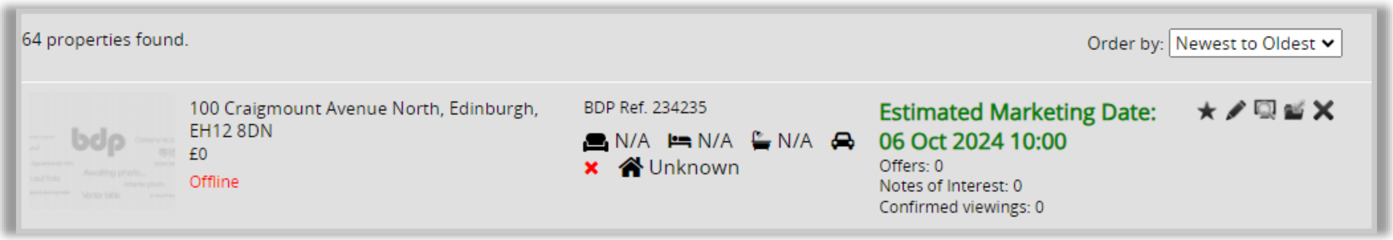
This form then appears which allows you to enter the details of the closing date, along with any associated notes. This is also where you'd amend or cancel a closing date if required.




From the details at the top, you will be able to see details of the estimated marketing date at a glance.




It will also be obvious from the property listing page.




New trigger events have been created to support any related workflow:

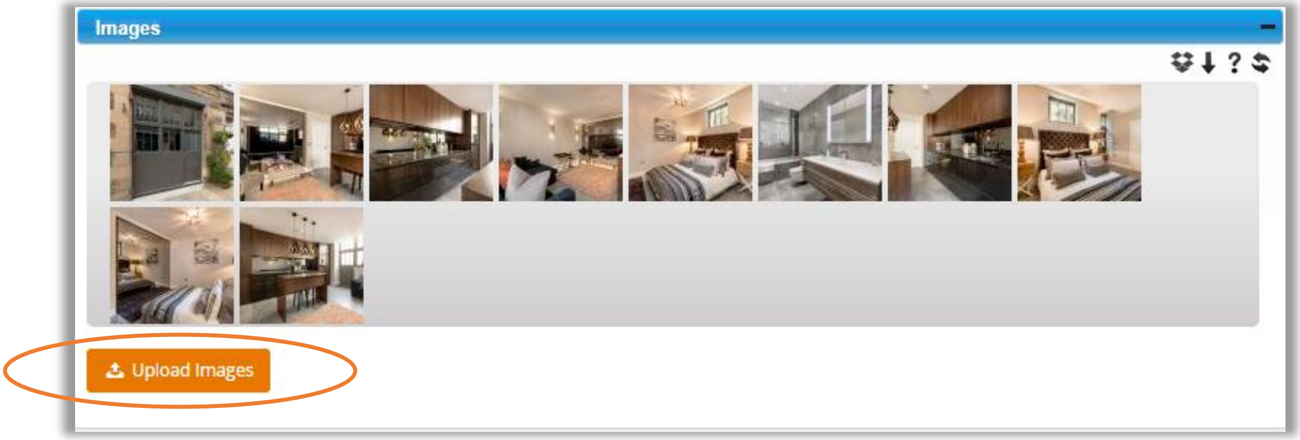
- *Estimated Marketing Date Set*
- *Estimated Marketing Date Amended*
- *Estimated Marketing Date Cancelled*

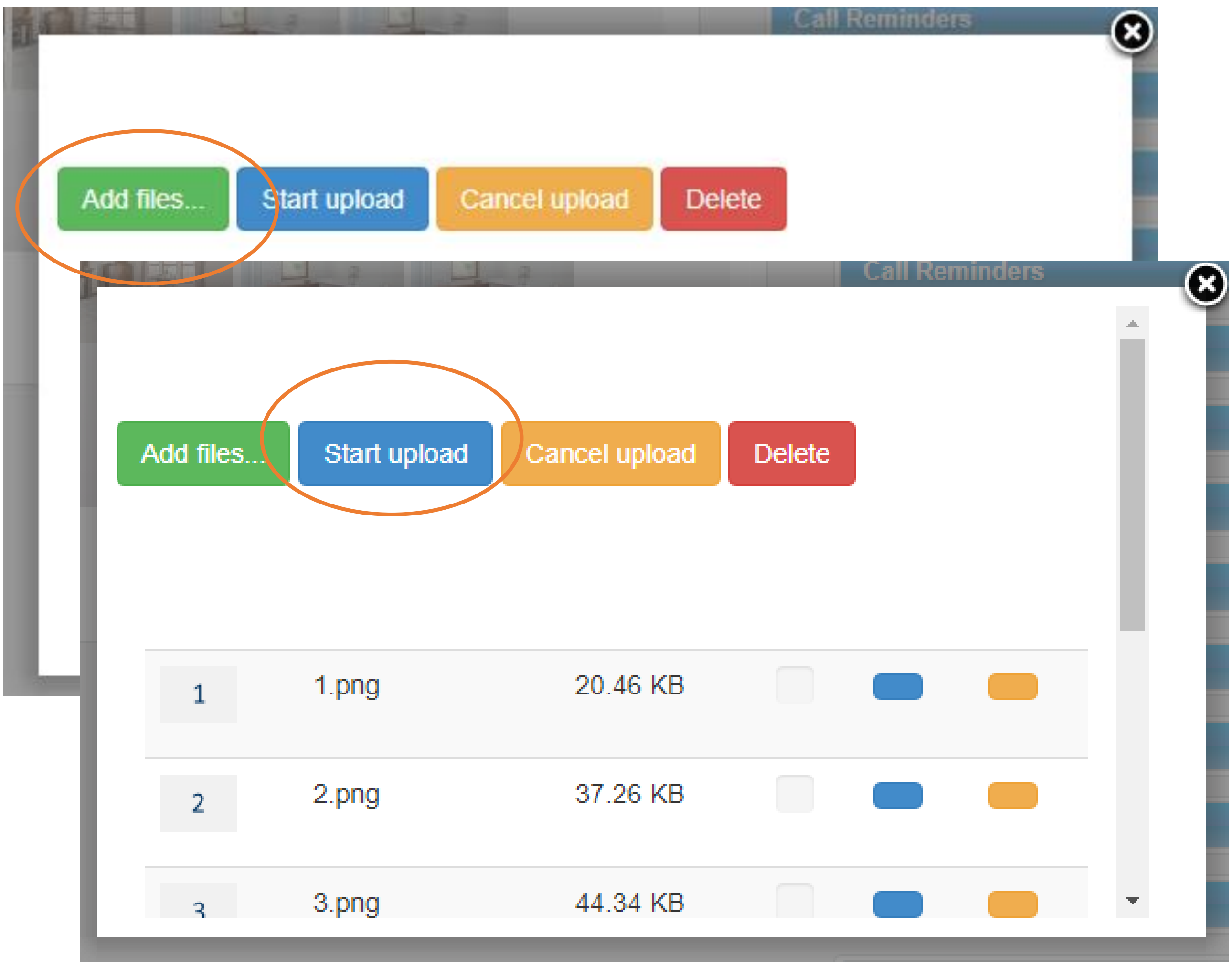
# 7. Uploading photography

Photography can be uploaded to BDP through the **Images** widget by uploading via a “Browse and Upload” method or Dropbox.

## 7.1 Browse and Upload method

Click ‘Upload Images’ to open the image upload tool. Press the green ‘Add files…’ button, you can now browse to where images are located.  Click on the images you wish to upload (you can choose multiple images) then press the blue ‘Start upload’ button. The images will appear in the **Images** widget once they have finished uploading.

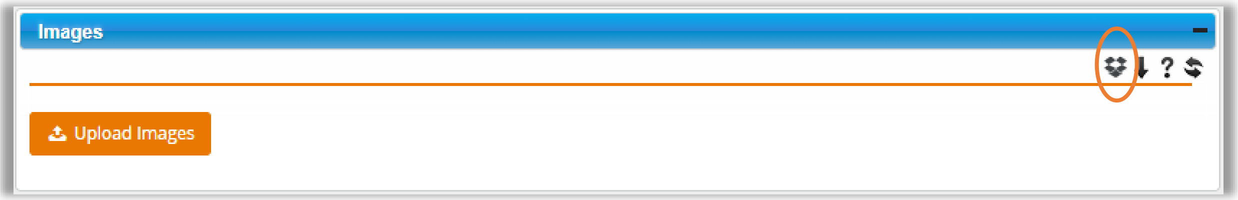


## 7.2 Dropbox method

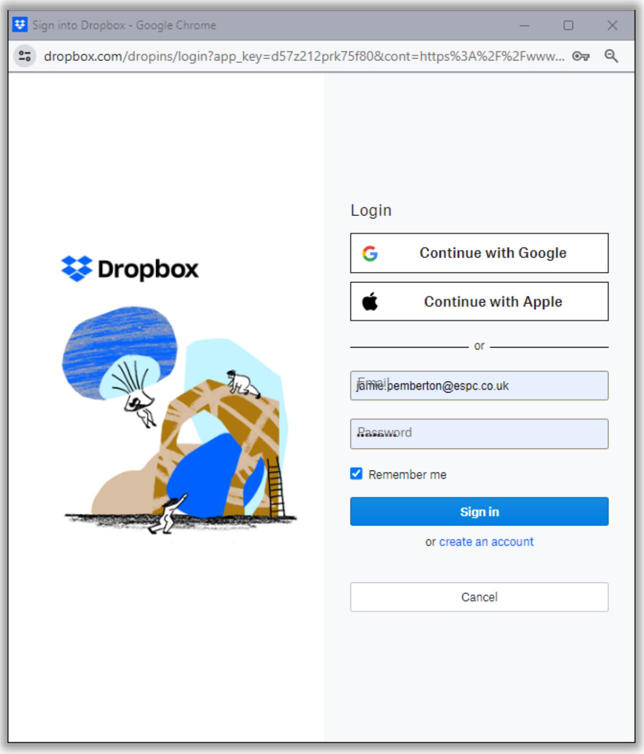
To use Dropbox you will require a Dropbox account using your work email. Your photographer will share a folder with you, this is usually a generic firm folder. You will receive an email with a link to the folder. Within this folder they usually create individual property folders containing the photography for specific properties.

Click the Dropbox button in the top right hand corner of the widget.

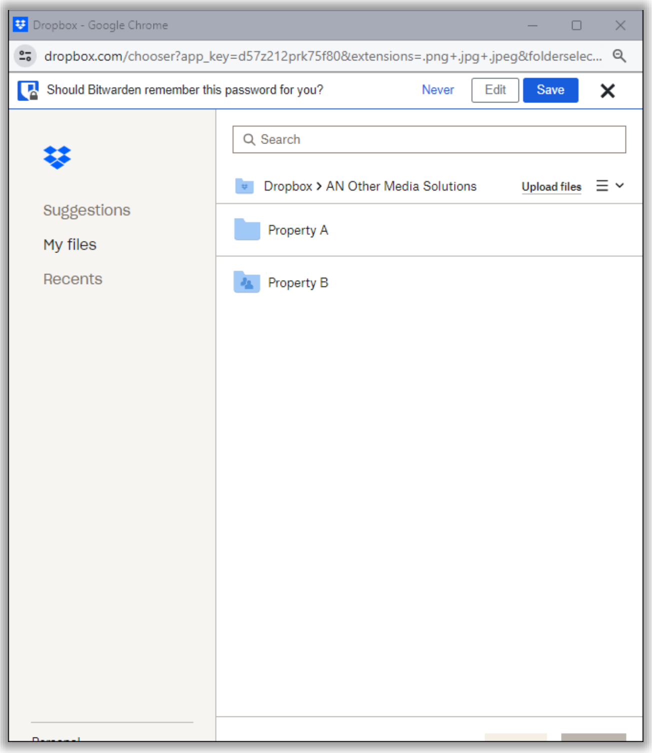



A pop-up will appear, this is the Dropbox application opening within BDP. If you have not done so already you will need to login to your Dropbox account.

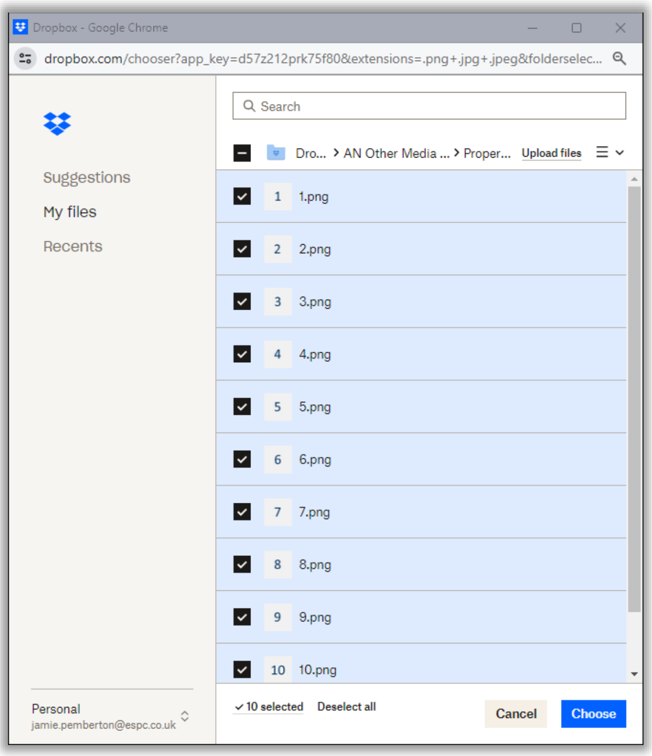
**Logged Out**



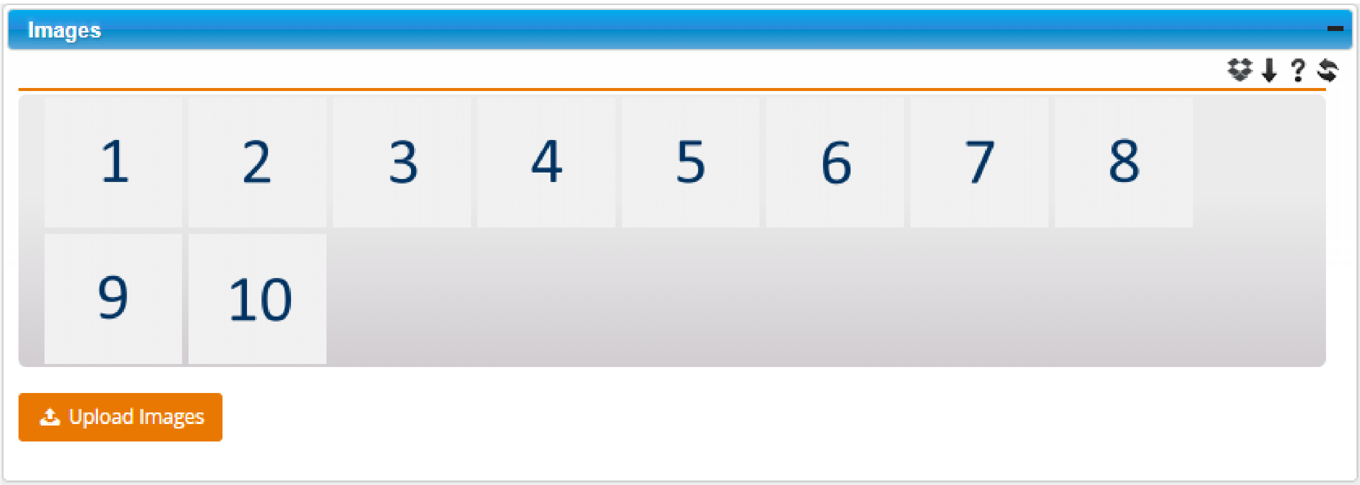

**Logged In**



Locate the required property folder for the images and click on the hyperlink for that property. Check the tick box for each image upload, then click the blue “Choose” button (bottom right hand corner of the pop-up).




The images will appear in the **Images** widget once they have finished uploading.




You can drag the images once uploaded into any order you wish.

You can delete, download or de-activate an image here by hovering over the image and selecting and following the instructions.

# 8. Entering the property details

You can enter all the relevant text and property descriptions within the Property Details widget, including the Viewing details. The mandatory fields here are Viewing Details, Bedrooms, Bathrooms, Living Rooms, Description and Website Display Description. If you leave Online Viewing Details Blank it will auto populate from the Viewing Details field.

**Property Details**

| | |
|---|---|
| Property Type | Semi-Detached |
| EPC Band | D |
| Heating | Ground Source Heat Pump |
| Glazing | Double |
| Council Tax Band | B |
| Bedrooms | 5 |
| Bathrooms | 2 |
| Living Rooms | 2 |
| Garden | Front & Rear |
| Parking | Garage & Driveway |
| Feature 1 | Impressive main entrance |
| Feature 2 | Open plan lounge and fitted, modern kitchen |
| Feature 3 | Ideal location for commuters |
| Feature 4 | Working fire place for cosy nights |
| Feature 5 | Attractive large garden to rear with substantial patio |
| Tenure Type | Freehold |

Online Viewing Details

by appointment telephone 0131 624 8000

Viewing Details

by appt tel 0131 624 8000

Website Display Description

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Donec finibus lacus ut magna laoreet, nec sollicitudin magna interdum. Aenean a lobortis turpis,... Read More

ESPC Publication

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Donec finibus lacus ut magna laoreet, nec sollicitudin magna interdum. Aenean a lobortis turpis,... Read More

Highlight

Vivamus fermentum pharetra ligula at lacinia. Vestibulum ante ipsum primis in faucibus orci luctus.

| | |
|---|---|
| Council Tax Exempt | No |
| Shared Ownership | No |
| Shared Ownership Rent Frequency | |
| Shared Ownership Percentage | |
| Shared Ownership Rent | |
| Annual Service Charge | |

Click here to edit the Property Details.

Portals have indicated that they may stop processing properties if material information for property listings is omitted, such as tenure, council tax rating and shared ownership information. Alternatively, they may highlight this missing information to users of their websites.

# 9. Entering the price, offer type & change status

You can enter the price and offer qualifier in the Selling Details widget.  This is also where you would change the status of the property. For example, from a ‘Valuation’ status to a ‘Available’ status when ready to market.

**Selling Details**

| | |
|---|---|
| Estimated Value | |
| Sale file reference | |
| Client has conveyancer | No |
| Client has Will | No |
| Mortgage on Next Purchase | No |
| Initial Purchase Price | |
| Mortgage Value | |
| Initial Purchase Date | |

Reason For Sale

Improvements Made

| | |
|---|---|
| Valuation Appointment | |
| Market Date | |
| Home Report Value | |
| Price | |
| Price Qualifier | |
| Selling Status | |
| Missives Concluded | No |
| Sold Date | |
| Sold Price | |
| Date of Entry | |
| Date Offer Accepted | |
| Date Missives Concluded | |
| Fee | |
| Fixed Fee | |
| Sliding Fee | |
| Misc Fee | |

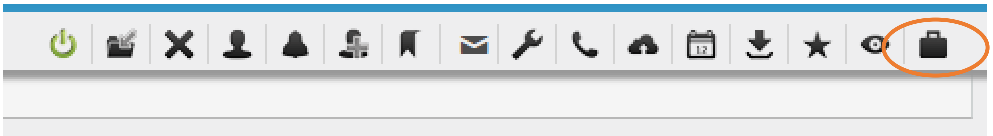
Notes

Click here to edit the Selling Details.

A number of fields are available to firms to help them manage their internal processes, such as recording the Fee charged or recording where in the selling process the property is currently sitting.

# 10. Home Report

You can order a Home Report using the briefcase icon if you have access to ESPC Member Portal or MoveMachine. Once published this will provide a direct link stored in the Marketing Materials widget but is ultimately managed by ESPC or MoveMachine.



a. Select the briefcase icon at the top of the page, or the 'Purchase Home Report' item in the tools menu.

b. The ESPC Member Portal will open (login if necessary).

c. The property details (address, valuation, bedrooms etc) should pre populate automatically.

d. Select the surveyor

e. Quote and check the cost.

f. Next, check sellers details in particular the contact number and email address.

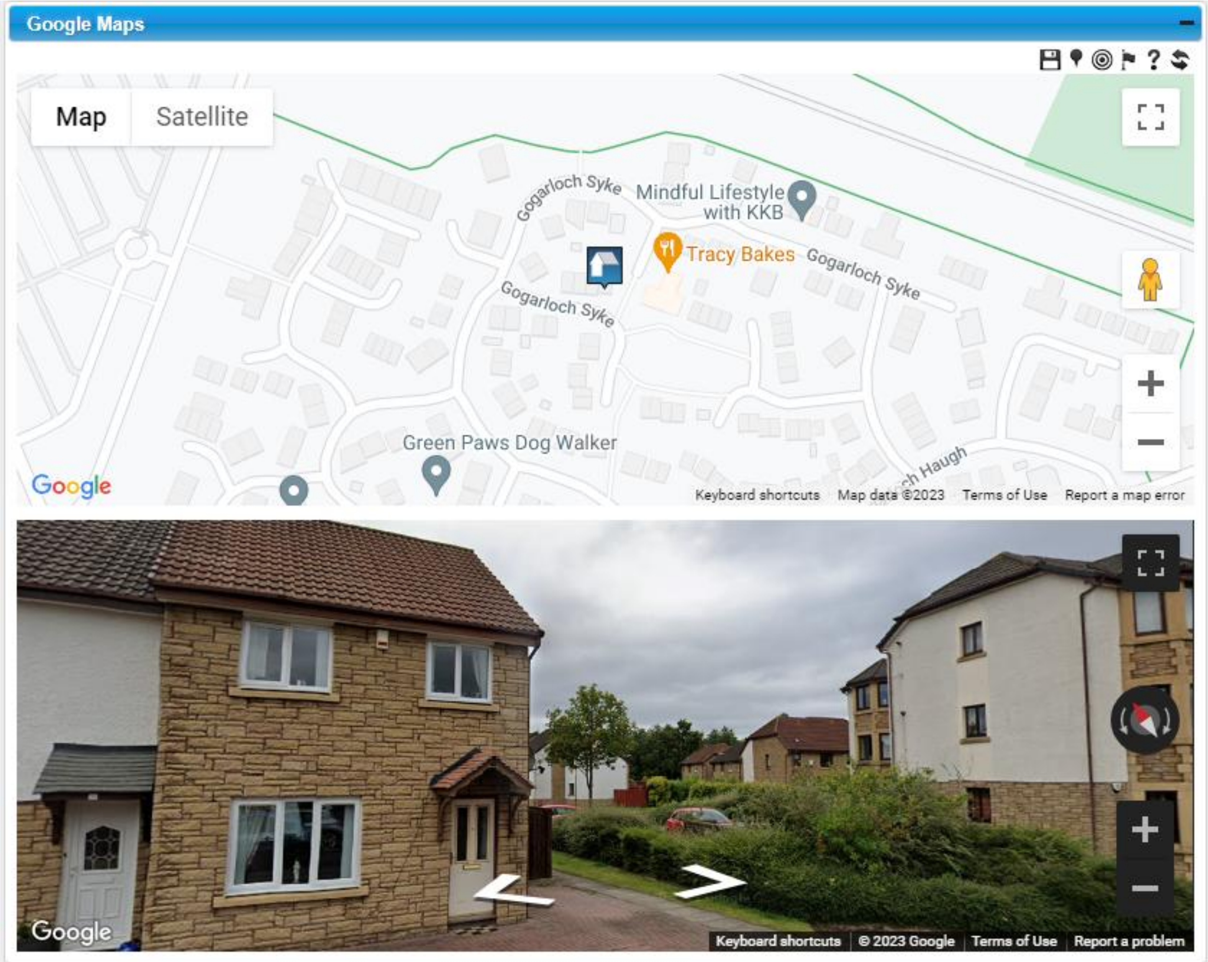
g. In the Checklist, update 'Home Report Ordered' to 'Done'

If you don't use ESPC's or MoveMachine's Home Report ordering system, you can upload a Home Report pdf to the widget in the next section. Please note that the home report does not feed through to ESPC's Member Portal, it has to be manually uploaded when setting the property live with ESPC.

# 11. Google Maps

BDP uses Google Maps to set the location of the property. You can set the exact location of the property on the map in this panel and you can output the related street view. Simply drag the marker to the required position.

**When you have made any adjustments to either the map or to Street view, press the save icon to save your changes.**

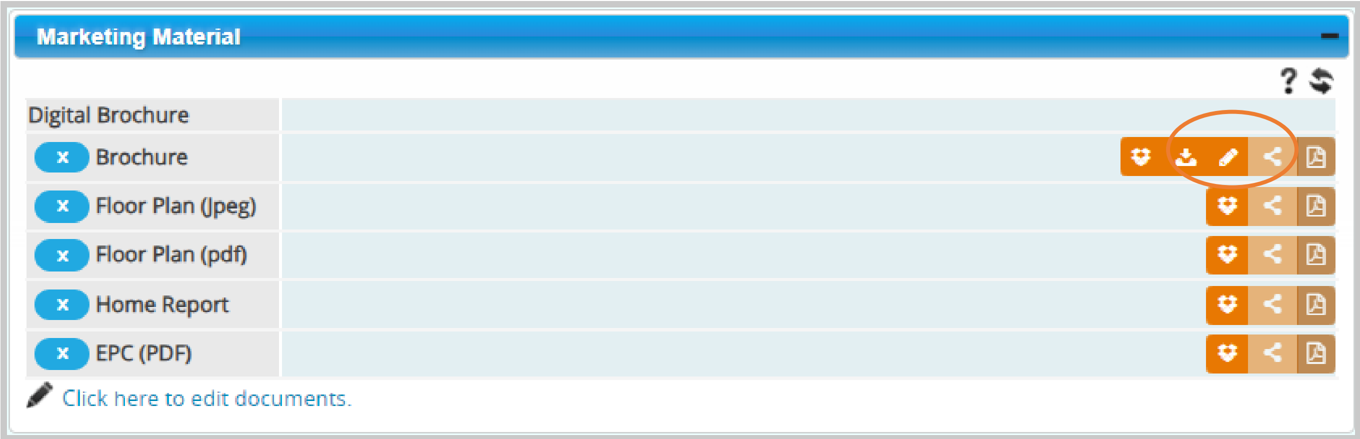



The icons, from left to right, are as follows:

- Save changes
- Match map to street view
  *You can drag the street view window around with your mouse to identify the actual property for sale. Once you have the street view window correctly positioned, you may wish to bring the map into line. Click this icon moves the map.*
- Match street view to map
  *You may want to position the marker on the map by dragging it around. Once it is in the correct location you can click this icon to bring the street view window in to line with the map. Clicking this icon moves the street view window while the map stays static.*
- Reset map to address
  *If you wish to reset the map to centre on the postcode and address of the property, click this icon. This changes both the map and street view*
- Help
  *Link to the Map help page*

# 12. Brochure and Floor Plan

These can be upload & stored to the Marketing Materials widget. To do this select 'click here to edit documents', this will let you upload or delete any of the marketing materials. If you are subscribing to the Client Login you can send these through by clicking the highlighted button.




Users of ESPC Brochure Creator software can access the software by clicking on the pencil icon on the brochure row, and when the seller has approved the brochure, it can easily be imported, by clicking the "Import from Brochure Creator" icon button and selecting the appropriate file to import.

Digital brochures can also be uploaded to and feed through to portals that accept them.

If your firm has Client Login enabled, these documents can be shared with the Seller by clicking on the share button. Shared documents will no longer appear transparent.

Documents can also be uploaded using Dropbox, see the Dropbox method as described in the images section.

# 13. Videos

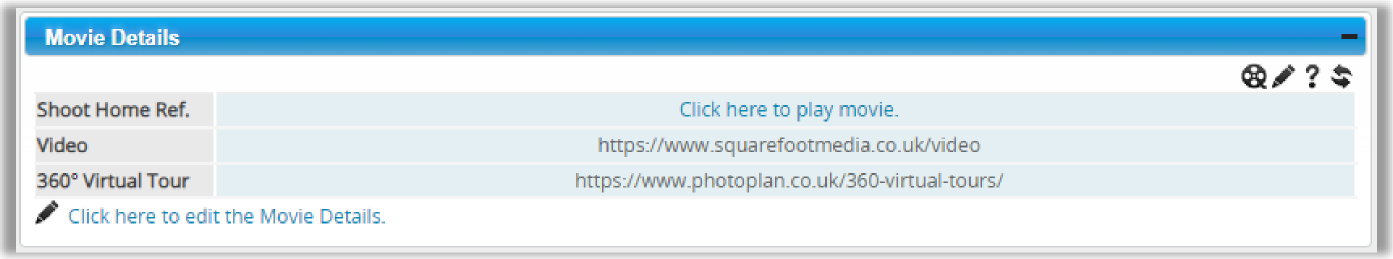
There are currently three available options:

1. Shoothome ref
2. Video; and
3. 360° Virtual Tour

Shoothome is now known as Vistabee and is a specialist supplier of property movies. They will supply a unique reference to you. This should be entered into the box provided. When a Vistabee unique reference has been added, a 'Cine Reel' icon becomes available to allow you to review the video within BDP.

Video can be used for movies from YouTube, Vimeo and other hosts. Simply paste the full URL (weblink) into this field. When a Video link is added a 'Cine reel' icon will become available to allow you to review the video within BDP.

The third box is for 360° Virtual Tours, such as those provided by Vuable and photoplan. Again, paste the URL (weblink) for the virtual tour into the box.



# 14. Property Management

The **Management** widget has a number of functions, amongst which are:

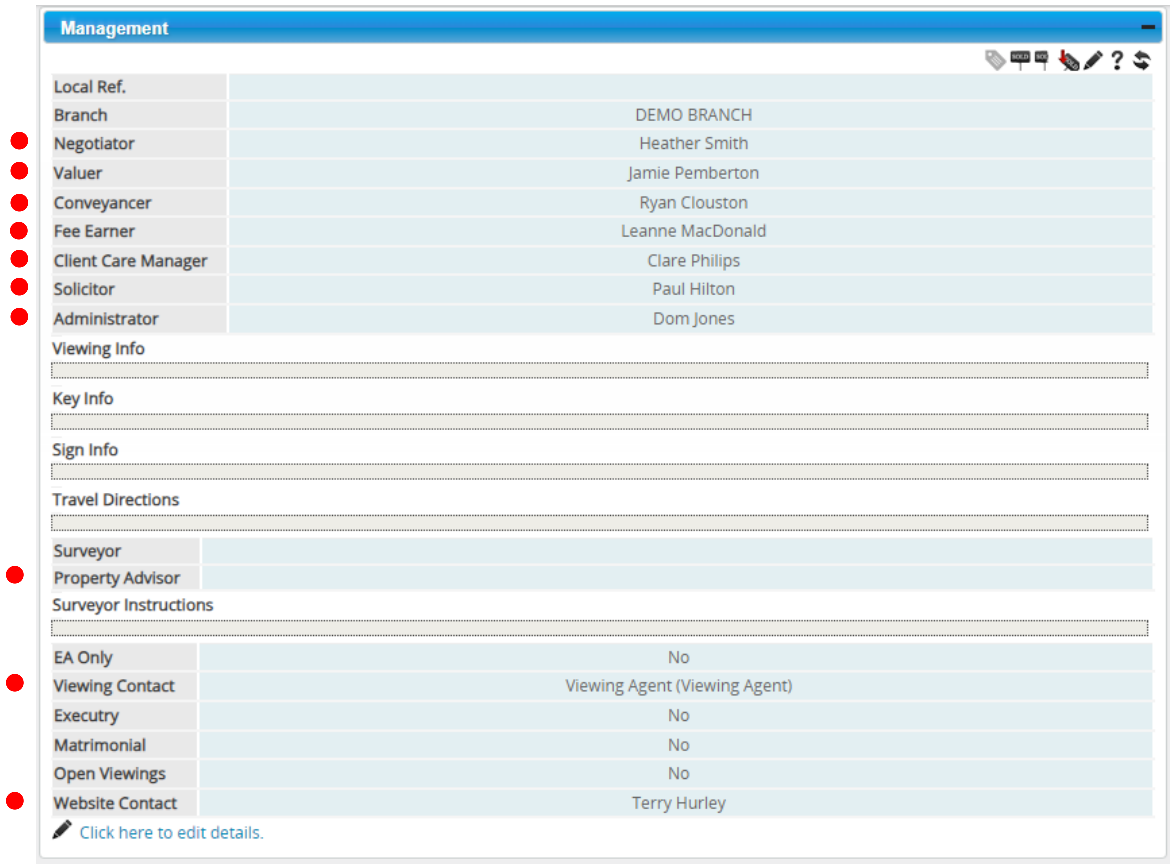
- Assign staff working on the property
- Managing for sale boards
- Select surveyor (if using ESPC for ordering home reports)
- Record if executry, matrimonial, estate agency only

## 14.1 Assigning staff

On a firm basis you can decide which staff roles you wish to record for a property. It’s important to understand that the member of staff assigned to a role **may** appear in your automated emails, if you have any. The roles available are:

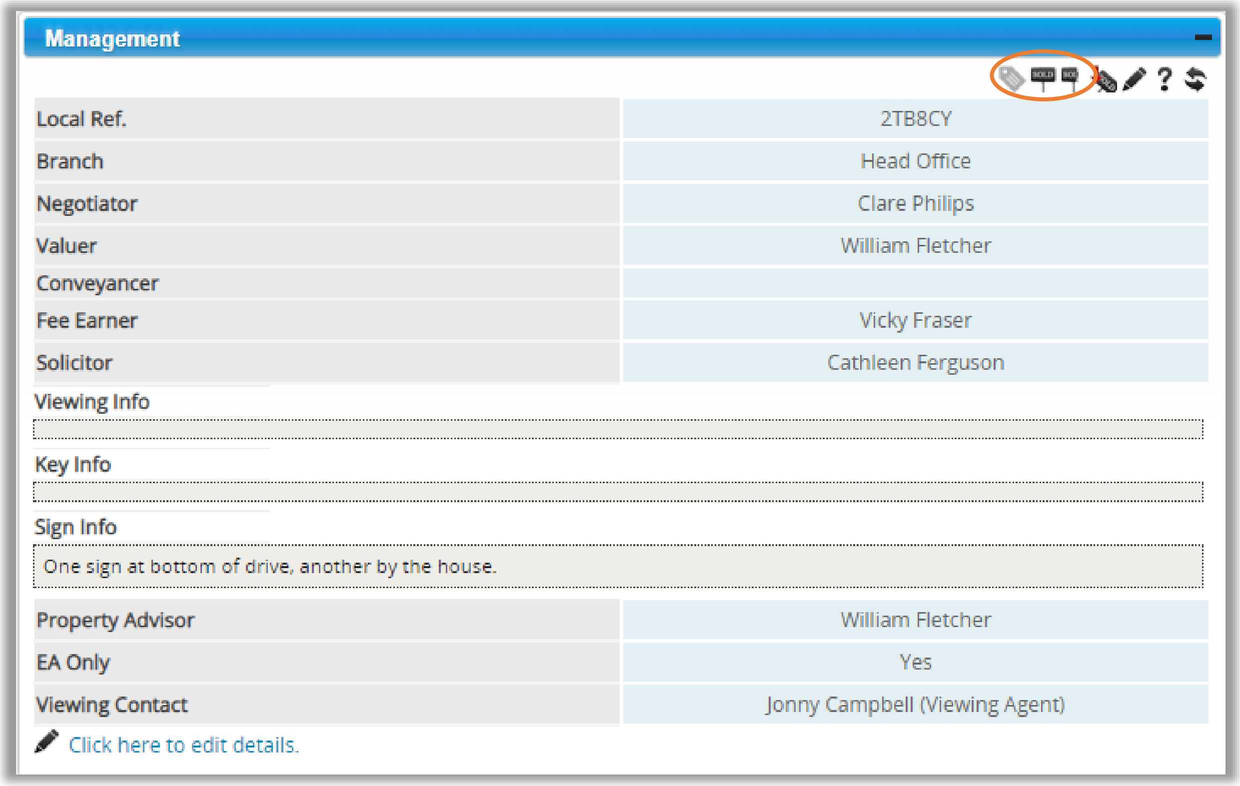
- Negotiator
- Valuer
- Conveyancer
- Fee Earner
- Client Care Manager
- Solicitor
- Administrator (Property, not systems)
- Viewing Contact – this can also be the Seller or a third party
- Website Contact (for ESPC website)

Your firm may not have all these roles enabled, just the applicable to your firm to allow you to manage your firms property workflow.



## 14.2 Ordering for sale boards

For sale boards and stickers can be ordered or removed from within the Management widget.




a. Check that the information in the **Sign Info** field is correct (sign type, position, text and access details)

b. In the Management Widget, click the ‘Order New Sign’ icon.

c. Click OK to send the request. This will automatically go to your for sale board operator*.

Under offer, sold, sold STC and “other” sticker types can be ordered and emailed directly to your sign company (if they accept orders by email). New and replacement signs can be ordered and the instruction to remove a sign can also be sent directly to your sign company from this widget. If there are any additional notes which need to be added, these can be typed into the Sign Info box.

* Your for sale board operator email can be configured on a firm wide or branch basis.

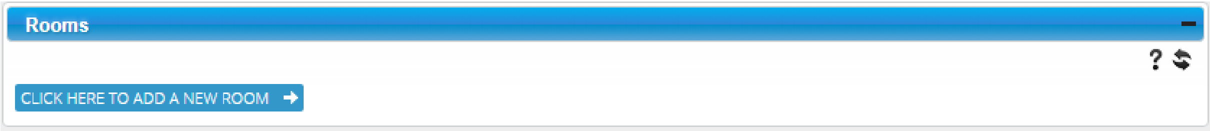
## 14.3 Other Management tasks

Other management tasks you can complete are:

- Add file reference or landlord reference
- Select/change branch
- Record Keys information, such as key slip reference, who they’re with etc

# 15. Adding rooms

BDP allows you to enter individual room dimensions that can be sent to portals and to ESPC's Brochure Creator software.

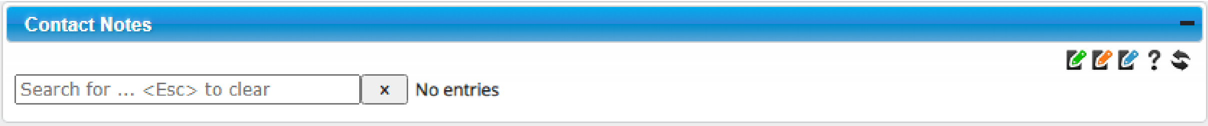




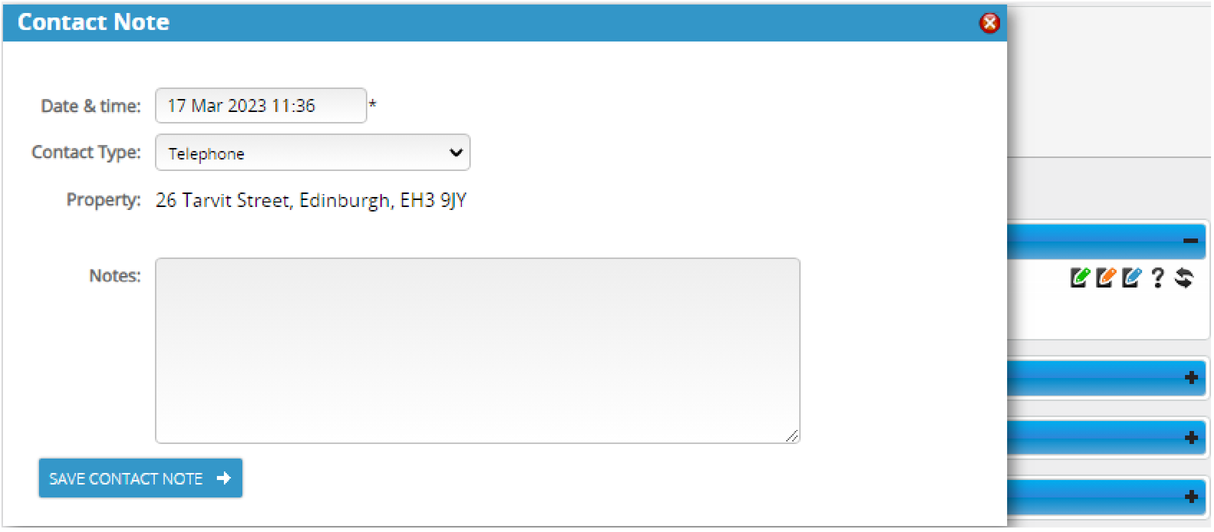
*Important: You should enter the dimensions of a room in Metres and BDP will automatically convert this to feet and display both measurements.

# 16. Contact notes

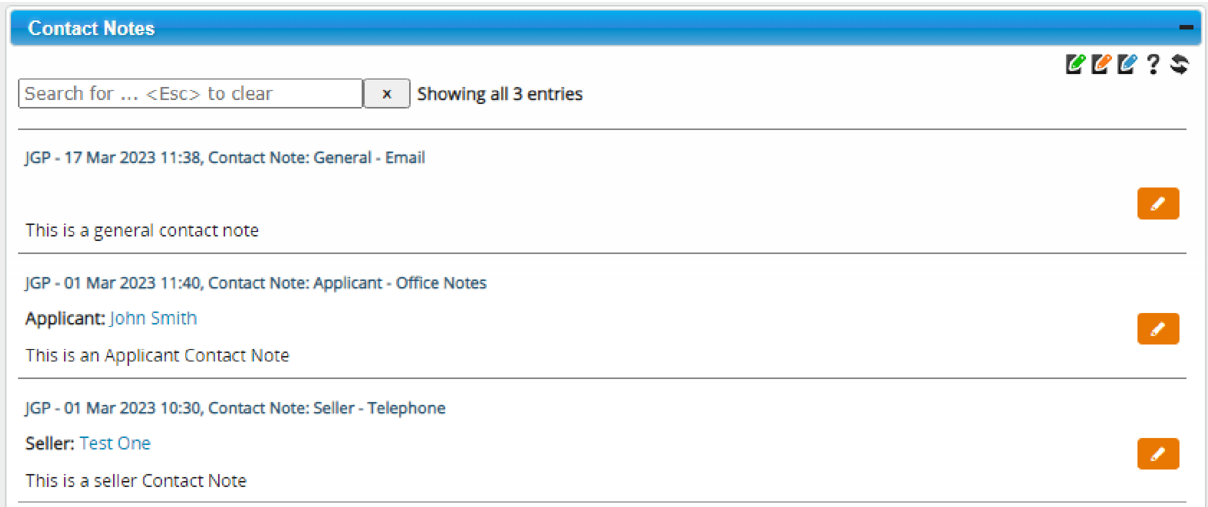
Correspondence and notes taken for the property can now be stored in BDP. These include notes from the Seller, Applicants and generic contacts.




To add a note, click on the appropriate pencil icon e.g. clicking on the orange pencil icon allows you to add a Seller Contact Note.




Contact notes are searchable and can be configured to be editable, if a firm so wishes (this is a whole organisation setting, not individual).



# 17. Setting the property live

Once you are ready to set the property live on the marketing portals, you simply need to

a. Go to the Selling Details widget and change the status to “Available”


b. In the top banner select the Set Online button 


c. These buttons will change to 


This will allow the feeds to push through to (*ESPC, Zoopla, Rightmove, S1, OnTheMarket & your website if set-up) and the property will be live on the market.

*ESPC – properties can be published ahead of going live to ESPC by clicking the button “publish to ESPC” in the External Systems and Feeds widget.

# 18. External Systems and Feeds

This panel controls whether a property is included in the Rightmove, OnTheMarket, Zoopla, ESPC, S1, etc. feeds.

External Systems and Feeds

| | |
|---|---|
| Rightmove Link | https://www.rightmove.co.uk/pr... |
| Publish to Website | Yes |
| Zoopla Link | http://www.zoopla.co.uk/realti... |
| Zoopla Feed Status | Added |
| Disable Closing Date on ESPC | No |
| On the Market | Yes |
| ESPC Feed | Yes |
| Rightmove | Yes |
| Zoopla | Yes |
| ESPC ID | 5787972 |
| ESPC HR Ref. | 445813 |
| Booking Calendar ID | |
| Booking Calendar Configured | No |
| ESPC Publish Date | 27 Feb 2023 |
| ESPC Expiry Date | 01 Mar 2123 (36507 days remaining) |
| ESPC Status | Active View on ESPC |

Click here to edit details.

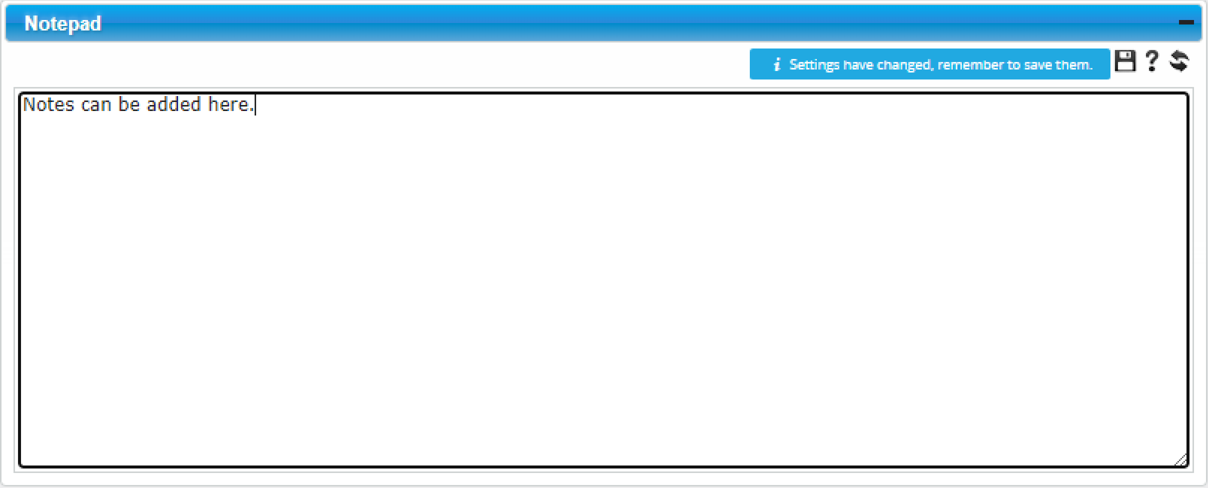
Customers of ESPC in Scotland will see an ESPC logo at the top of this widget. Clicking this “pushes” the property to the ESPC member portal so that the invoice can be approved in preparation for launch. See the next section in “making a property live” for more details.

If you are an ESPC Exclusive customer the feeds to other portals will be delayed until the 72 hours has expired.

Shortly after the properties are live on ESPC, Rightmove, Zoopla a link to the listing on the relevant portal will show. Feeds to Rightmove, Zoopla and OnTheMarket are now Realtime feeds.

# 19. Notepad

Here you can leave generic notes against each case. This could be anything from important notes the user needs to remember to things that other colleagues working on the case need to know about.

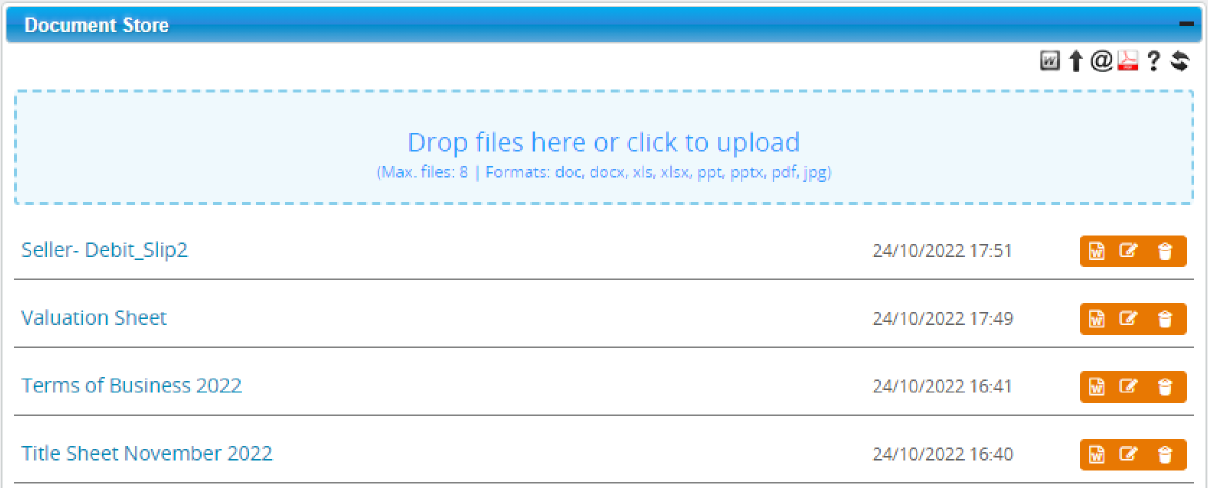



For example if the client is on holiday this information can be put here so any member of staff working on the case can see.

**Note: Changes made in this section won’t be reflected in the property log**

# 20. Document Store

The Document Store is a powerful feature that allows for the storing of any document against a property.



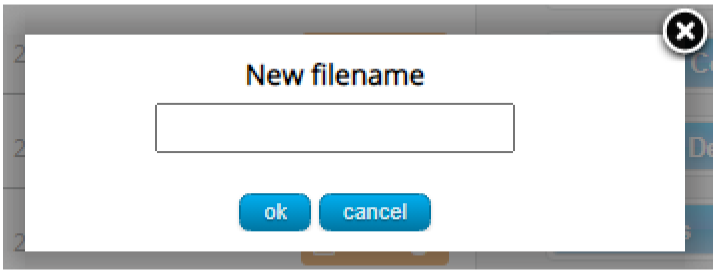

BDP is able to handle the following file types:

- .doc
- .pdf
- .odt
- .docx
- .xls
- .xlsx
- .xlsm
- .pptx
- .ppt
- .jpeg
- .jpg

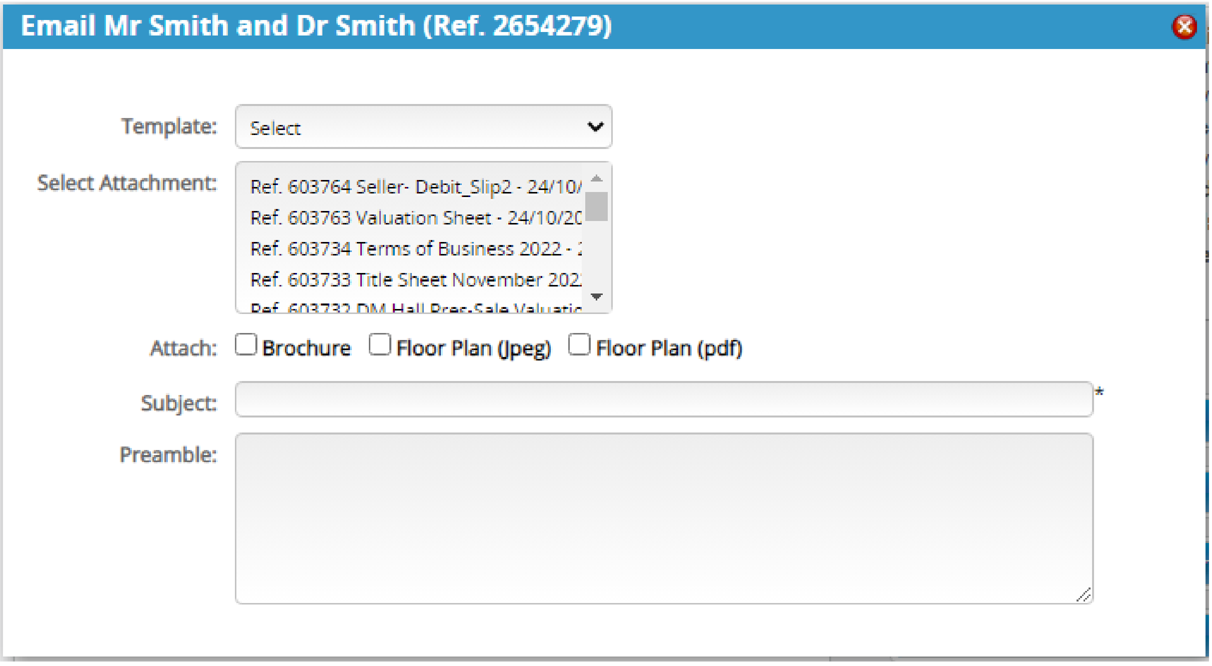
Within the Document Store, it is also possible to generate a pre-populated template in either Word or PDF format.

Templates are Word documents that contain placeholders which BDP identifies and fills in with data from the BDP system.

You can also amend the name of the document within the Document Store, just click on the pencil icon and add the new name for the document.




An email to the Seller Contact Group can also be sent from here, allowing you to attach document or marketing material, by clicking the @ icon:


Email Mr Smith and Dr Smith (Ref. 2654279)
Template:
Select
Select Attachment:
Ref. 603764 Seller- Debit_Slip2 - 24/10/
Ref. 603763 Valuation Sheet - 24/10/20
Ref. 603734 Terms of Business 2022 - 2
Ref. 603733 Title Sheet November 202
Attach:
Brochure
Floor Plan (Jpeg)
Floor Plan (pdf)
Subject:
*
Preamble:

# 21. Add viewing

a. Select the 'Viewing'  (eye) icon in the top bar or the 'New Viewing' link in the tools menu or 

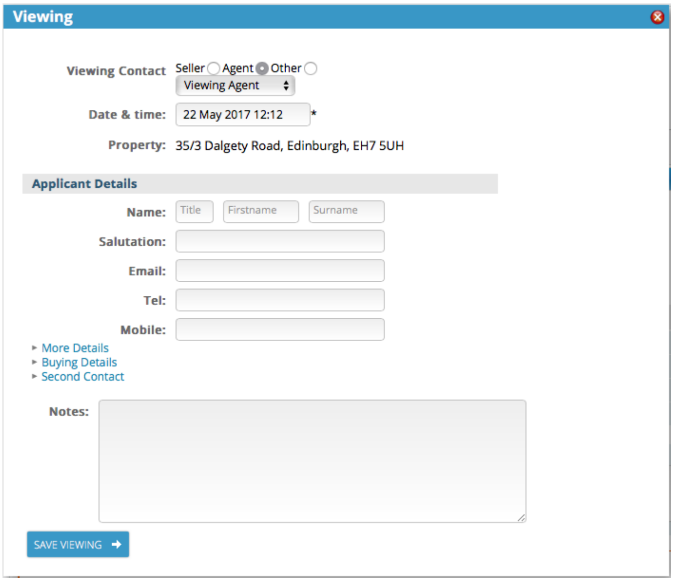
in the left hand menu

b. The Viewing Contact will automatically be set to match the details on the file. This can be over ridden if necessary.

c. Enter the date and time that has been requested for the viewing

d. Enter the Applicant details. If they already exist in BDP they will appear as you start to type their name.

e. Add notes re. flexibility and whether the viewing has been arranged.



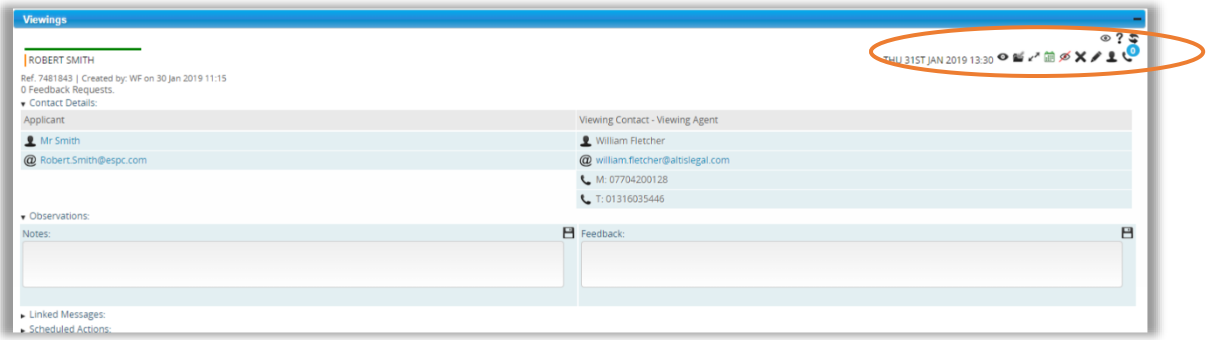

Each firm will have their own automated emails set-up, generally no two firms are the same.

**NOTE:** Viewing appointments can be created via the **Calendar** widget on the Dashboard

# 22. Manage viewings

Viewings can be managed from the tab along the top of the screen (the options which appear here can be selected in the configuration menu).


This tab will take you directly into all the viewings associated with the property. You can either have the viewings collapsed or opened out to provide a view with more information.

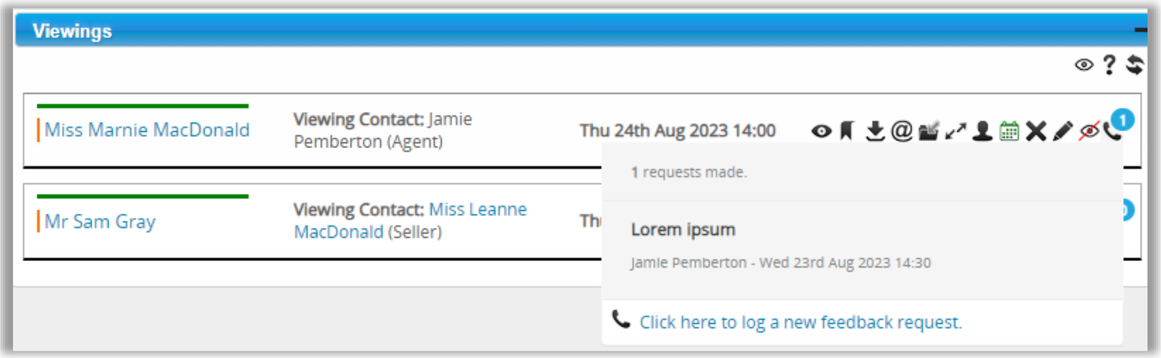



From here, viewings and all actions associated with a viewing can be managed. The icons at the top right of the screen allow the following actions:

- A subsequent viewing to be created
- The contact to be added to the mailing list (the envelope icon changes from red to green)
- The contact to be archived
- Mark the contact as not interested in this particular property to avoid them receiving any future notifications
- Unconfirm a viewing
- Hide a viewing
- Cancel a viewing
- Edit a viewing
- View applicant ID
- Log feedback requests

If you have Open Viewing enabled, they will also be visible here and will show with a light orange background.

Unsuccessful Feedback attempts (phone calls unanswered, chase-up emails ignored etc.) can be recorded in the **Log Feedback Request** section:

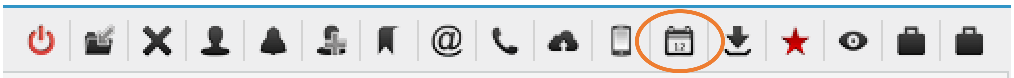



**NOTE**: The “notes” section is for internal use only and won’t be visible to the client. If you are using BDP’s client login, the “feedback” section could become visible to the seller – even historic data.

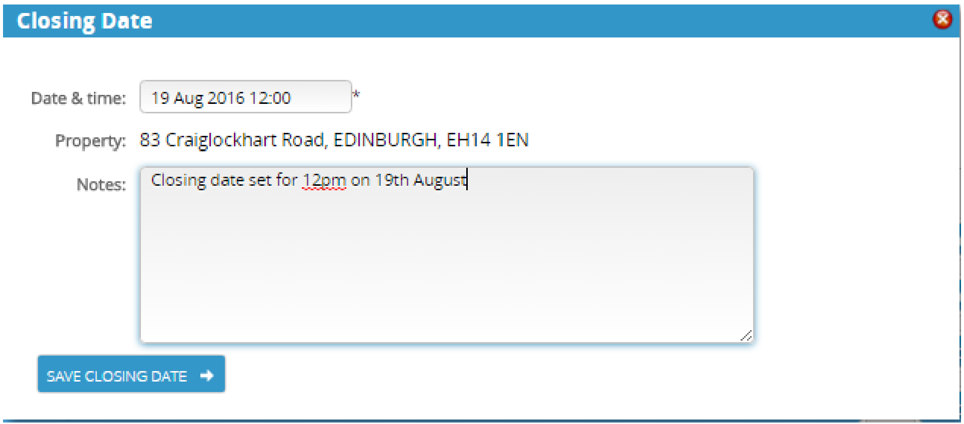
Basically – try not to put anything in here you wouldn’t want the client to see!

# 23. Manage closing dates

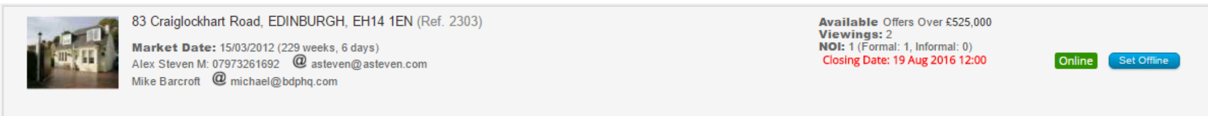
A closing date can be set on a property using the tools menu at the left hand side of the screen or the same icon at the top right.



This form then appears which allows you to enter the details of the closing date, along with any associated notes. This is also where you'd amend or cancel a closing date if required.



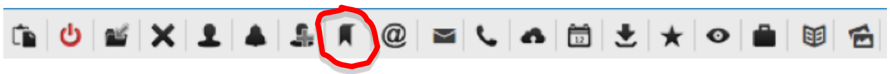

From the details at the top, you will be able to see details of the closing date at a glance.



# 24. Add Note of Interest

The following steps should be followed for both an informal and formal note of interest.

a. Select the ‘Note of Interest’ icon from the top bar, or the ‘Add Note of Interest’ link in the tools menu:



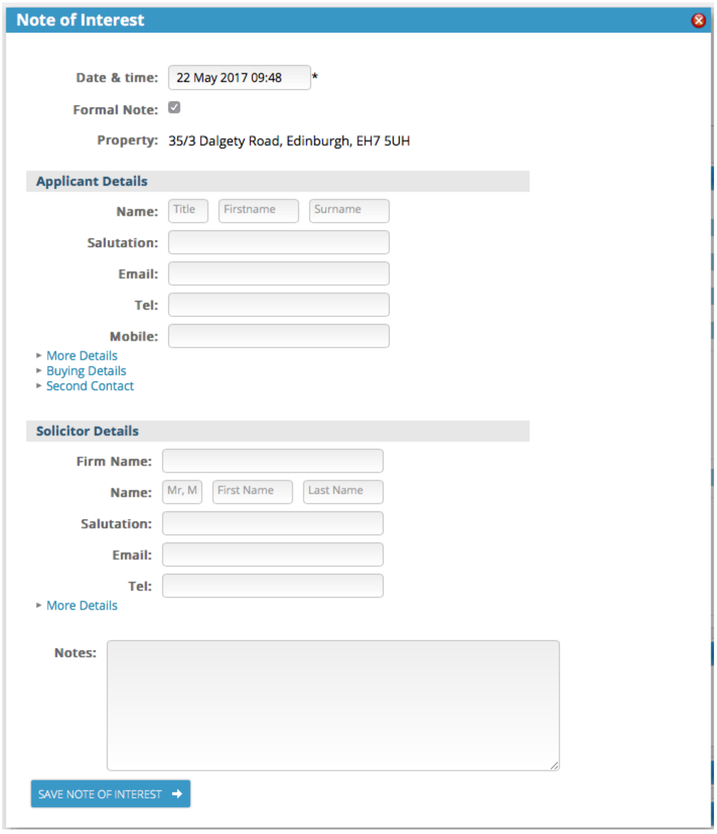
or 


b. Complete the pop-up form with the relevant information for the applicant. If they already exist in the system their details will appear as you type.

c. For an Informal note of interest un-tick the Formal Note box at the top and leave the solicitor details blank.

d. For a Formal Note, leave the ‘Formal Note’ box ticked and complete the solicitor details.

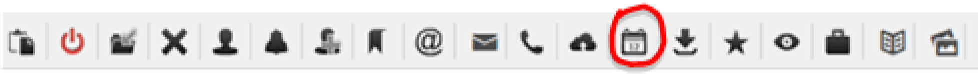
e. Any notes on the buyers position (FTB, NTS, MAIP etc) should be added to the Notes field.




f. Save note of interest

# 25. Setting a Closing Date

a. Select the ‘Closing Date’ (calendar) icon from the top bar or the ‘Set Closing Date’ link from the tools menu:



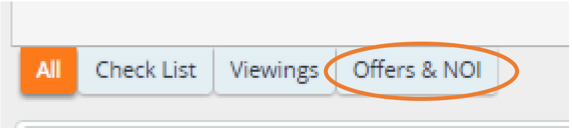
or 


b. Enter the date and time of the Closing Date in the form that appears


c. Save Closing Date

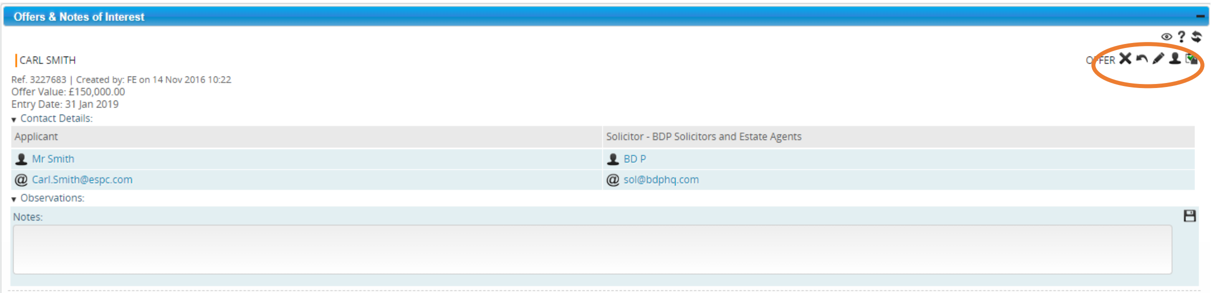
# 26. Manage Notes of Interest and Offers

NOI and offers can be managed from the tab along the top of the screen (the options which appear here can be selected in the configuration menu).

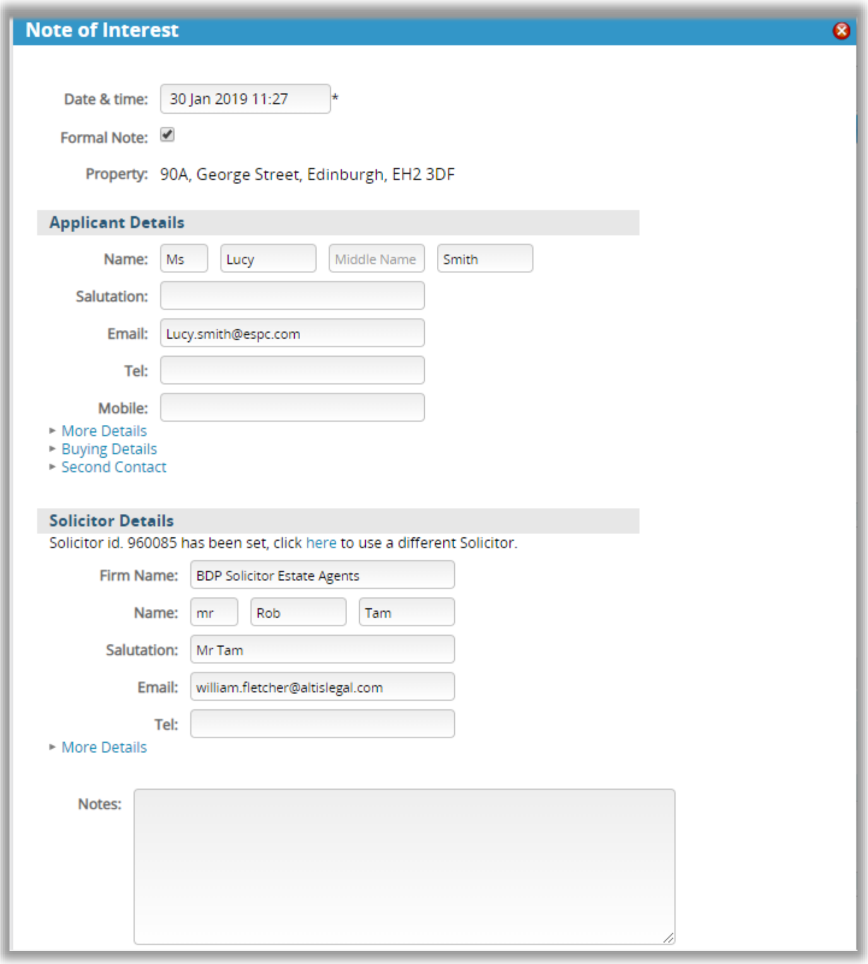



This tab will take you directly into all the offers and notes of interest associated with the property.

From here, you can change the formal or informal note of interest into an offer by selecting downwards arrow icon.



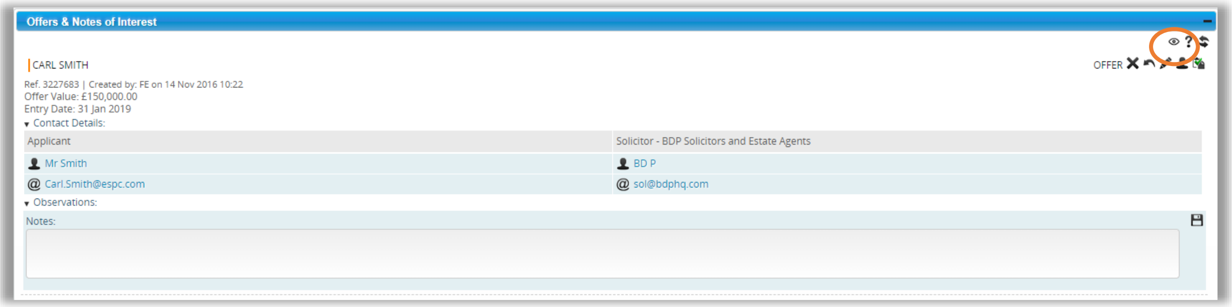

This will pull up the following screen which allows you to enter in the offer details and solicitor details.




Once the details have been entered, click “save offer”.

Any notes associated with the offer or buyer can be added to the notes section.

Once you're ready to accept an offer, click the icon highlighted below which will prompt you to confirm the details and change the status of the property to under offer and reconfirm the selling details.

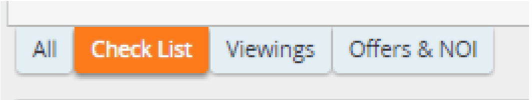




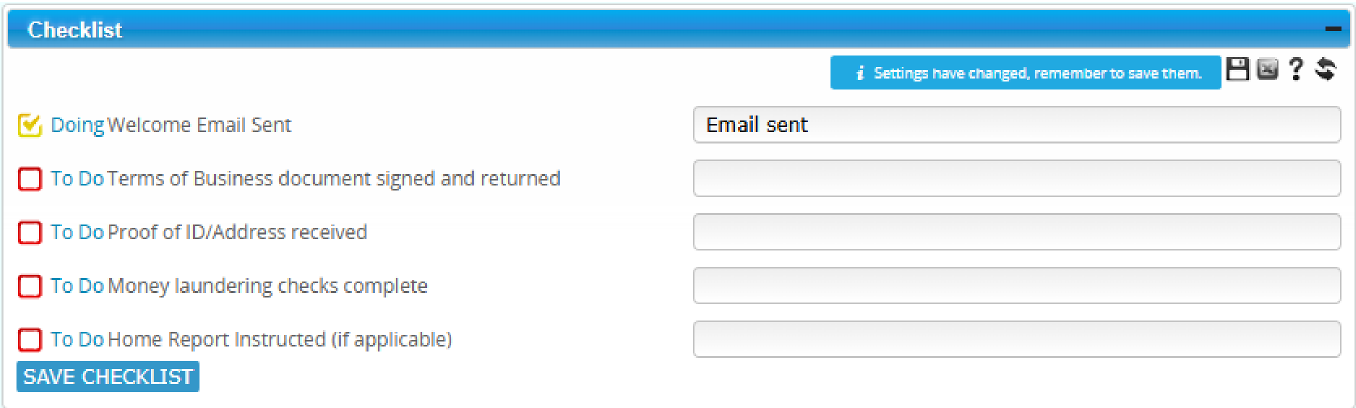
The summary which appears at the top of every property will now show what date the offer was accepted on and how long the property has spent on the market.

# 27. Checklist

The Checklist widget, that can be configures to live in a separate **Checklist** tab or on the general **All** tab along the top of the screen will provide a clear view of any checklist items which have been set up within the configuration section.



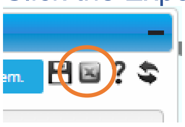

The checklist can help to monitor the progress throughout the estate agency process. Clicking once on the check box changes the status of the item from “To Do” to “Doing”. Clicking a second time changes then changes this to “Done”.




Rules can be created to trigger emails when the status of a checklist item changes. For example, if one of the checklist items is “Schedule to be authorised by client”, once the schedule is uploaded to BDP and the checklist item is marked as “Done”, an automated email, attaching the schedule, may be sent to the client for approval.

You can download the checklist in CSV format (which can be opened in Excel) for either a single property or for all properties with a specific status.

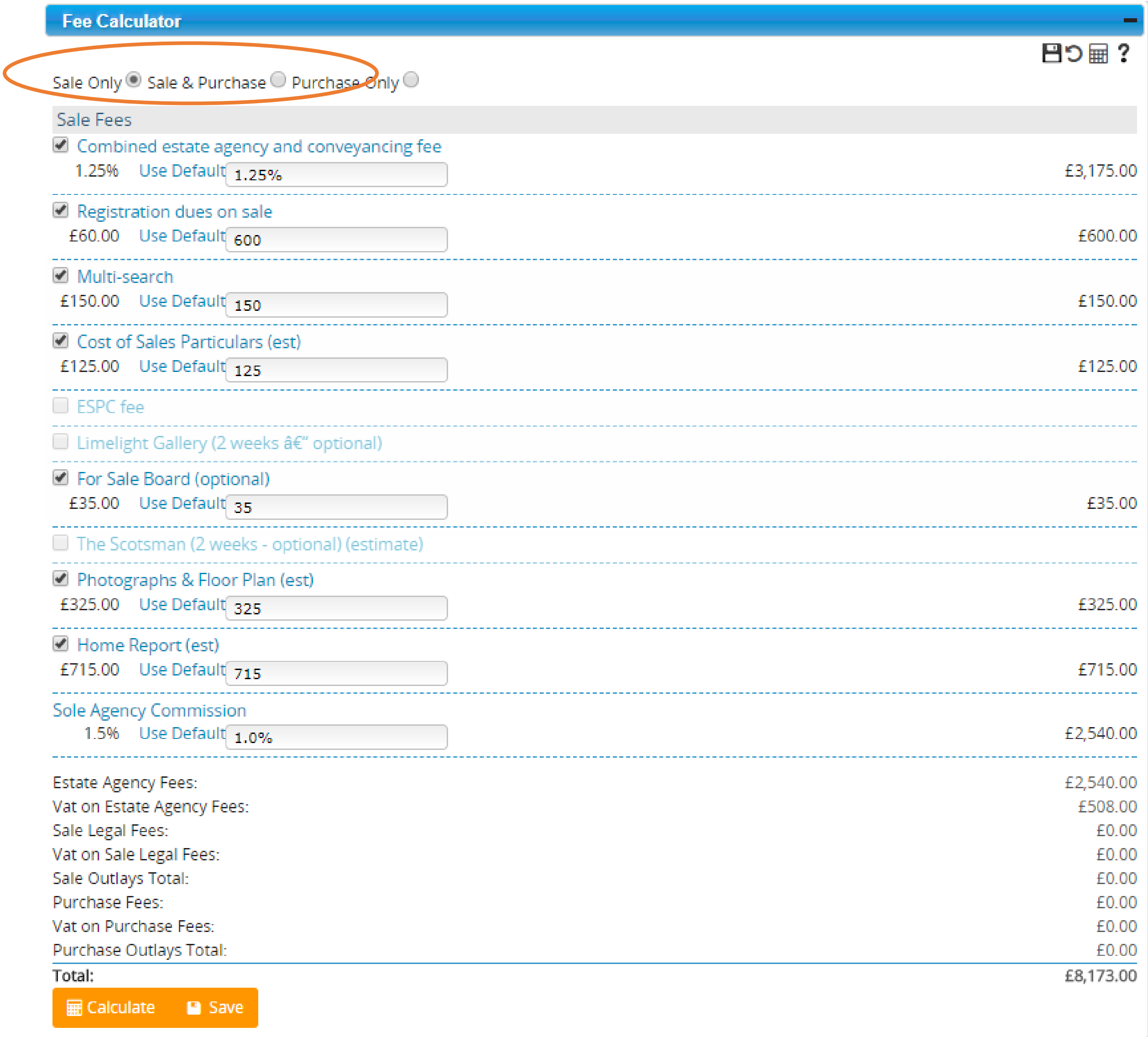
- **To download for an individual property:**
  Click the Export button (Excel icon) within the Checklist widget.



- **To download for multiple properties:**
  Create a basic report, which now includes an option to include checklist items. For more details, see Section 33.

# 28. Fee Calculator

Fees and outlays can be calculated and stored in BDP. Fees stored in BDP can be used for yield reporting and creating fee quotation documents. To set the fees for a property, go to the 'Fee Calculator' widget and click either 'sale only, 'sale & purchase' or 'purchase only' as applicable.




Each fee 'part' is calculated based on calculations set in account configuration. Each part can be overwritten on a property by property basis and you can untick those costs which are not applicable. Clicking save at the top of the fee's widget saves the fees for this property.

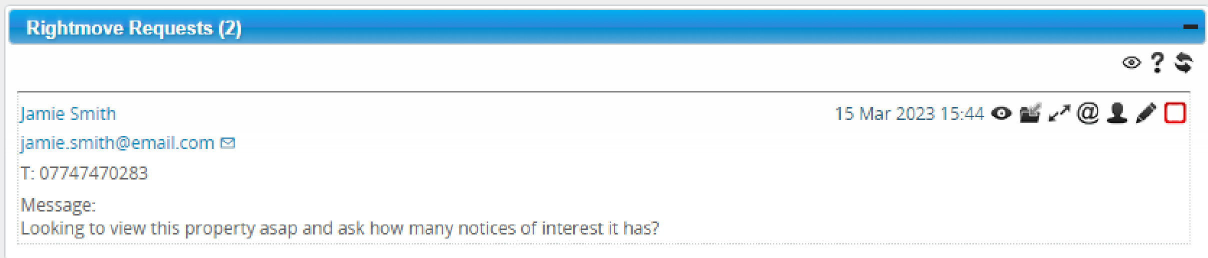
Home reports must be either ordered through the member portal or uploaded there. The icon to do this can be found in the top right-hand side of the screen and is in the shape of a briefcase.

Selecting this will prompt a popup window showing the case on the ESPC member portal. Follow the normal process for ordering home reports and once it is completed it will automatically appear in BDP. NOTE this is one of the few sections that feeds from the members portal to BDP.

***Note: The fee calculator must be configured before this will work. Talk to your account manager to arrange this***

# 29. Rightmove Requests

Applicant requests from Rightmove are stored here, along with any message that the Applicant has left.




An email rule to immediately send a message to the Applicant acknowledging the request and sending a link to the home report and brochure and enquiring if they wish to arrange a viewing.

It’s recommended that the messages are monitored as some questions submitted by an Applicant may not be answered by the automatic email rule.

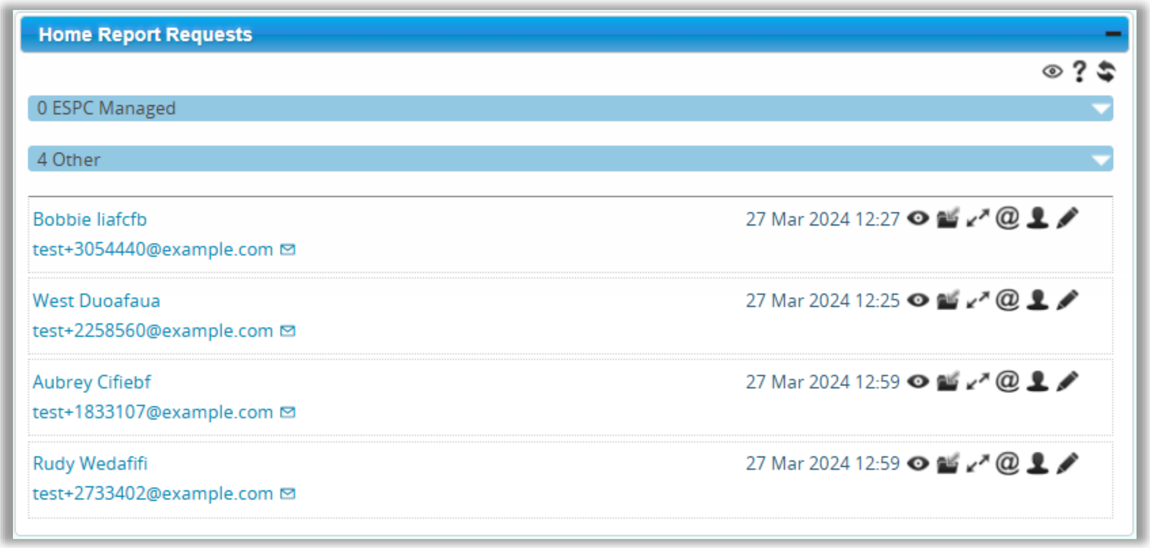
You can email the Applicant directly from this widget using predetermined email templates you have created along with attaching marketing materials. Users are also able to:

- Create a viewing
- Archive the Applicant contact group
- Mark the Applicant contact group as not interested
- View Applicant contact group details and amend
- Edit to update the message
- Mark as actioned

# 30. Home Report Requests

Scottish customers can have access to the Home Report Requests widget.

There are two sections, each of which can be collapsed. If the property is managed by ESPC, home report requests  will appear in the “ESPC Managed” section, otherwise they will appear in the “Other” section.


Again, an email rule to send a message to the Applicant acknowledging the request and sending a link to the home report and brochure and enquiring if they wish to arrange a viewing of the property.

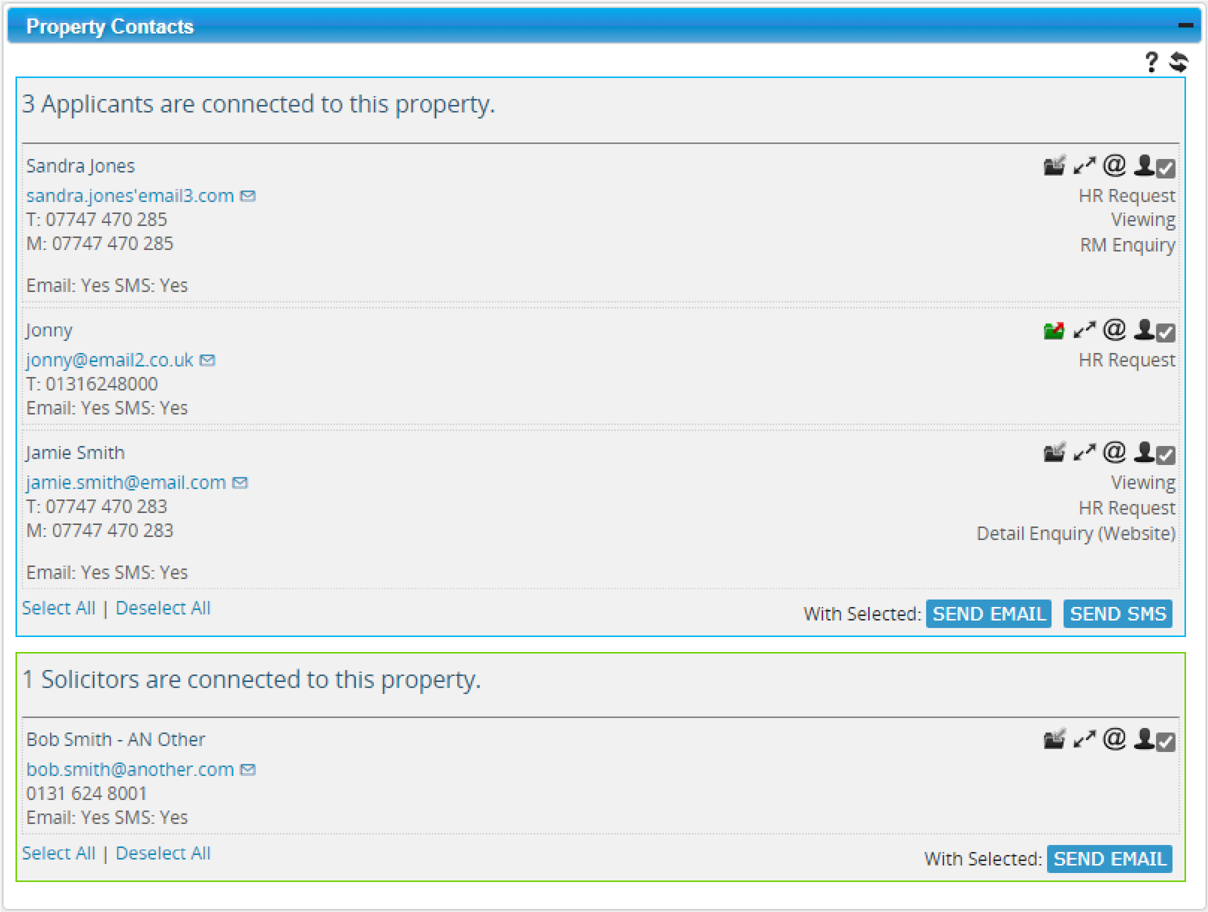
Similar to the Rightmove Requests you can email the Applicant directly from this widget using predetermined email templates and are able to:

- Create a viewing
- Archive the Applicant contact group
- Mark the Applicant contact group as not interested
- View Applicant contact group details and amend
- Edit to update the message

# 31. Property Contacts

The Property Contacts widget contains a summary of all applicants that have expressed an interest in the property and any solicitors that may be associated.

An email or SMS may be sent to any of the property contacts by clicking the relevant button next to their entry or bulk email/SMS can be sent to all (or a selection).

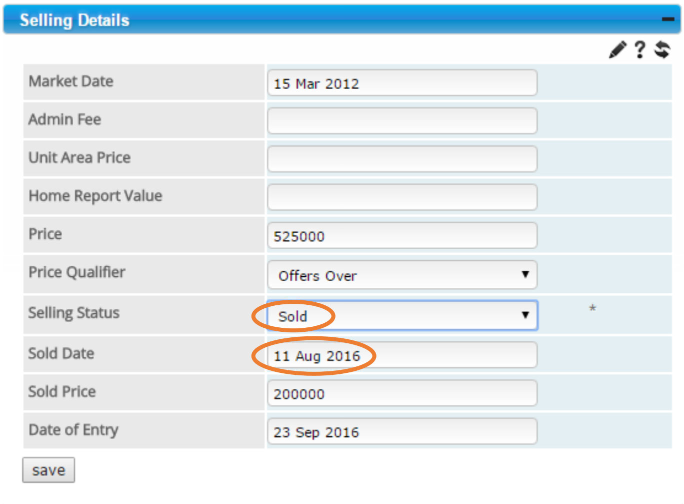



Some basic information is detailed about each Applicant, such as contact details, but also how the Applicant is connected to the property, such as:

- Home Report request (from espc.com)
- Viewing booked
- Open viewing booked
- Enquiry from own website
- Office enquiry
- RM enquiry

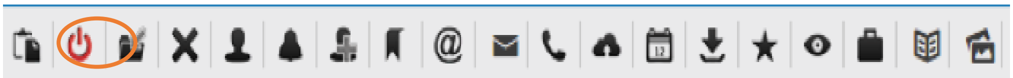
# 32. Post Marketing Management

Once the accepted offer is completed, ensure the property is marked as sold with the sold date input.




When you are notified that missives are concluded, you can go back in and update this field.

Once the funds for the property clear, the property can then be archived by clicking the icon at the top right-hand side of the screen.

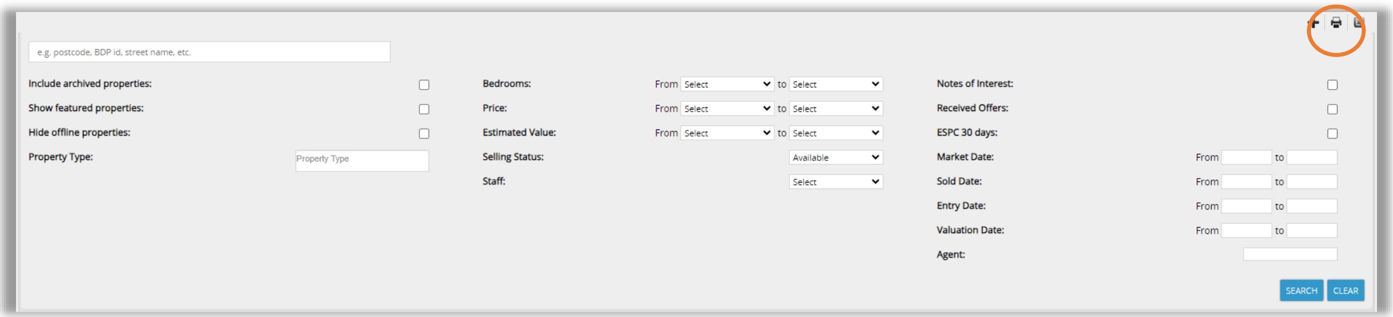


# 33. How to run basic reports

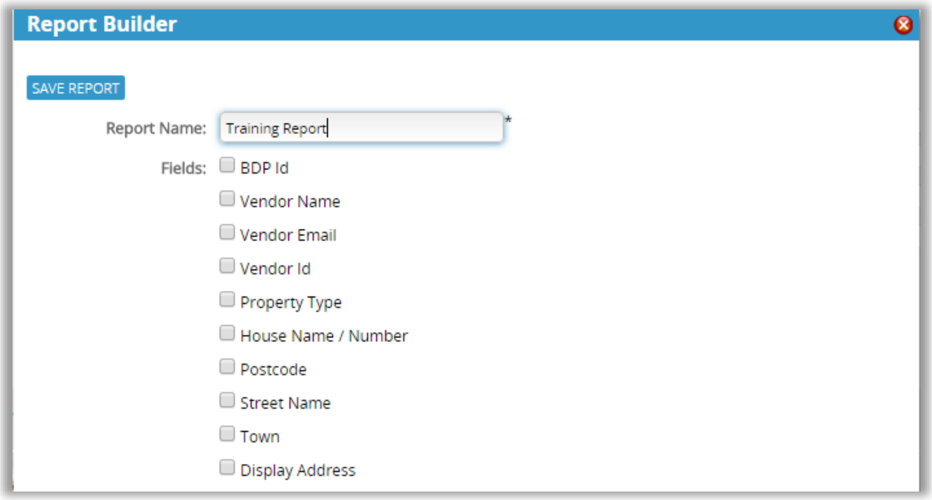
From BDP, it's possible to use the basic reporting which you may find useful for internal business purposes.

To create a report, in the left-hand navigation click on "Properties", and then "All" or 'Available', 'Under Offer' *etc*. to return a list of properties to report on. You can finesse the list more you can filter using the tools in the page header.

You'll see a small Excel icon in the top right-hand corner:




Click on Create New Report which will open up a Report Builder screen. From here, give your report a meaningful name and select (by placing a tick in the box) which fields you'd like to appear in your spreadsheet once it's been generated. Then click "Save Report".




Now when you click back into the Excel icon, you'll see a list of any previously created reports which you can download by clicking on the Excel icon within the report builder. To make any edits to the report, click on the pencil icon, edit your fields and save it again.

## 34. Security

Due to the nature of the sensitive information stored in BDP, we advise all users to remember the following points when logging in:

- Never share your password with anyone, even colleagues
- Use a combination of letters, numbers, symbols, characters and cases
- Use a phrase or well-known quote – e.g. Iam:)2b24! or 2B-or_n0t-2b
- Please don't write your password down
- Avoid logging in on public or shared devices or on unsecured Wi-Fi connections
- Always remember to log off when you're leaving your computer

## 35. Firm specific rules

Each firm can and will have a bespoke setup. This includes the configuration, attributes manger and rules section. It is always worth looking at these on an individual basis to see how much or little automation they have set up.

# For any questions and support please either: email help@bdphq.com or telephone 0131 624 8000