May 14

Day-to-Day Usage of BDP

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

Barcroft Digital Ltd., Edinburgh, 2014. Version 1.0.0

Table of Contents

BDP UI Basics

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. BDP signs all outgoing emails with a valid Sender Policy Framework (SPF) record, so messages shouldn't generally be blocked.

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.

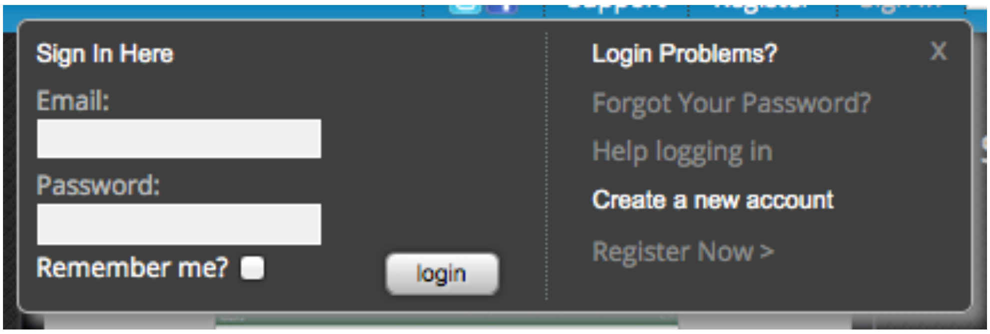

Figure 1. The BDP login box

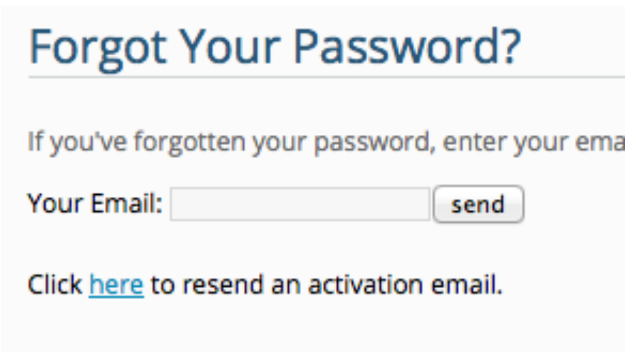

Figure 2. The forgotten password and email activation screen

Logging In & Resetting a Password

Logging in to BDP is done either via the link in the top bar at https://bdphq.com or via the 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 The BDP login box and The forgotten password and email activation screen above

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.

Selling Details

Market Date	02 Sep 2013
Admin Fee	
Unit Area Price	
Home Report Value	£850,000
Sold Date	
Sold Price	
Date of Entry	
Selling Status	Available
Price	£855,100
Price Qualifier	Offers in Excess of

Click here to edit the Selling Details.

Figure 3. An example of a Widget

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.

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.

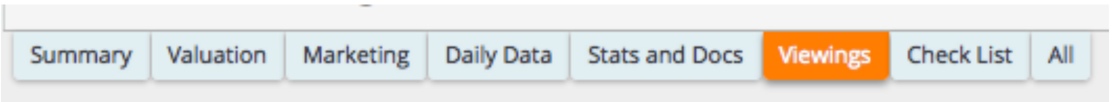

Figure 4. Example tabs.

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.

A Widget search tool is provided in the left-hand column allowing a type-ahead search for all widgets and a drill-down tab tree.

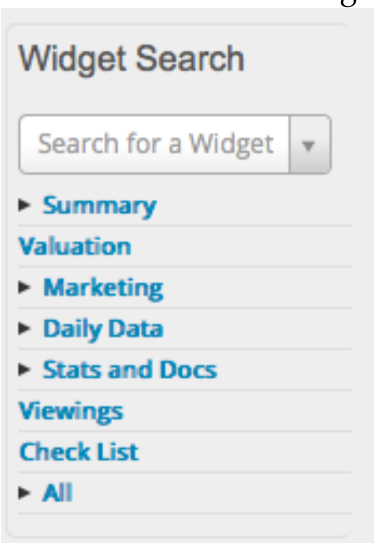

Figure 5. The Widget search tool.

Toolbars

Context-sensitive 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. The tools available will vary according to context.

Figure 6. Top toolbar icons when in the Property Detail screen.

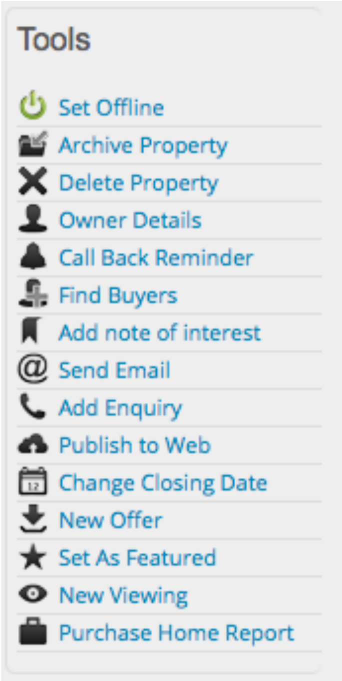

Figure 7. Side tool panel when in the Property Detail screen.

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.

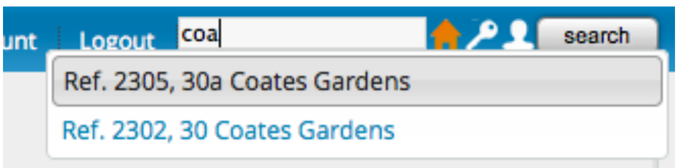

Figure 8. Quick search box.

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.

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

Support

BDP has a support desk that can be accessed in two ways:
Go to https://bdphq.com/support and create a support ticket. This page can be reached by clicking the Support link in the top toolbar in BDP
Send an email to help@bdphq.com and 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.

Adding & Editing Basic Property Information

Creating a new Property

To begin adding a new property, first click Property in the left-hand menu then either click "Create a property" in the left-hand menu or click any of the sale categories. Once in any sale category, click the Plus sign in the top right under your agency name.

NOTE: If you have both sales and lettings enabled, you will see the word "Sales" instead of "Property. To create a new letting property, follow the above procedure in the Lettings section.

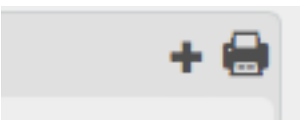

Figure 9. Plus icon to add new property.

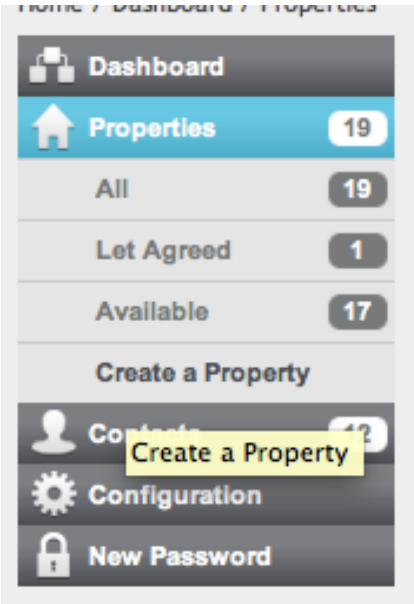

Figure 10. Left-hand menu showing Create...

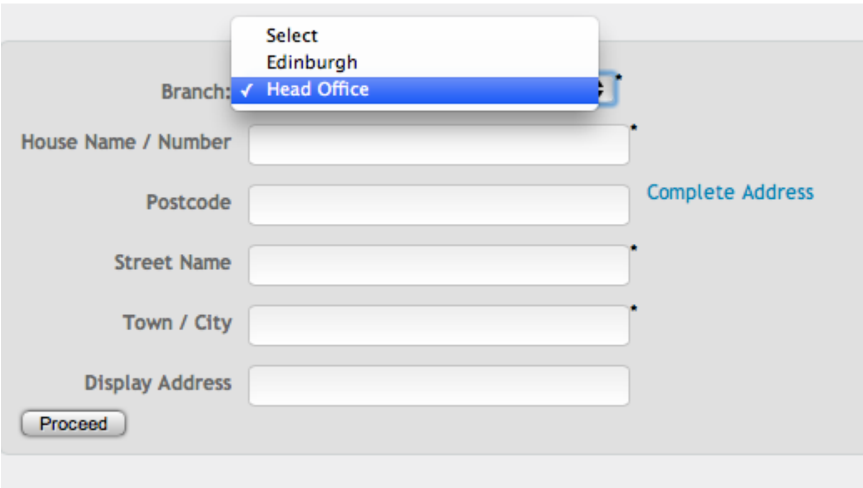

Figure 11. New property input form.

You are presented with a new page. Select the branch marketing the property if applicable. Note that the default branch will be the one associated with the currently logged-in user account.

Next fill in the full address details or (optionally) the house name or number and the post code and click the Complete Address link. If this causes inaccurate data to be filled-in, please change the entry as required. *The Complete Address tool is provided for convenience only, may not always be perfectly accurate and the results can be manually overwritten.*

If you require an address other than the full postal address to be displayed then please complete the “Display Address” box. For example, you may wish not to display the actual house number, or to display just the district and not the actual road name.

For BDP’s Scottish clients only:
If you are a member of ESPC and have ESPC feed selected in the configuration, you will see a box requiring you to fill in the ESPC district.

Archiving & Deleting

Once a property is sold you may not want it to show up in your list of properties. It can therefore be either deleted (permanently removed) or archived (masked but all data retained).

To Delete a property, click either “All properties” or the relevant category of property. Locate the property in the list or search for it using the search box. Click the X in the icon group to the right.

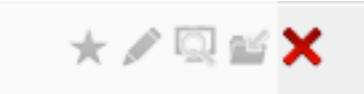

Figure 12. The Delete icon.

To Archive a property click the folder icon in the icon group to the right of the property in the property list.

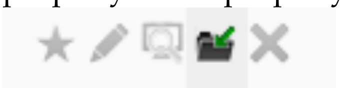

Figure 13. The Archive Property icon.

To view archived properties, include archived properties in a property search by ticking the box.

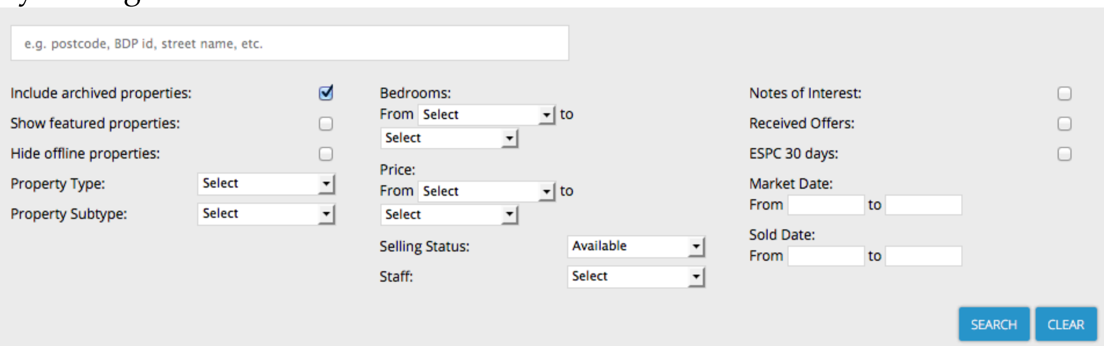

Figure 14. The 'Include Archived Properties' tick-box.

To un-archive a property, when viewing the property listing including archived properties, click the un-archive icon in the icon group to the right.

Figure 15. Un-archive a property

Archived properties are displayed in the list as slightly more opaque than live properties to help see at a glance the status of the entry.

Advanced Property Search

The Advanced Property Search box appears above the property listing.

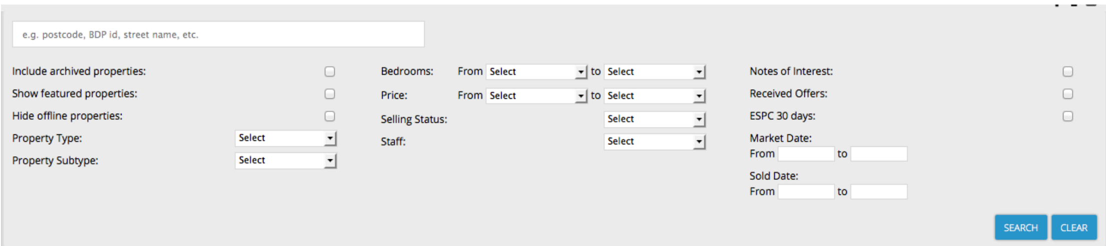

Figure 16. The Advanced Search box.

This box allows you to filter properties with the following tools:

- Include Archived properties. See Archiving & Deleting
- Show featured properties. See [link to Featured tutorial]
- Hide offline properties. Property that is not live is hidden.
- Property type. Taken from the BLM standard property type database per the [link to property type widget entry]
- Property sub-type. Context-aware list conditional on Property Type selection.
- Bedrooms. Minimum and maximum select boxes available.
- Price. Minimum and maximum select boxes available
- Selling status. Includes all selling statuses per the global configuration for your firm.
- Staff. Drop-down list of all staff. Filters property where selected staff member is associated in any way
- Notes of Interest. Scotland only. Display only property with a Note of Interest logged.
- Received offers. Only properties with an offer logged.
- ESPC 30 Days. (Scotland only). Only those properties that will expire on ESPC within the next 30 days.
- Market date. Date picker for a range of dates.
- Sold date. Date picker for a range of dates.

Optionally you can enter a key-word into the input box. The search covers all address fields, including ESPC area for Scottish clients.

Report builder based on Advanced Search results

You can save any advanced search and generate a report based on it by clicking on the "Excel" icon in the top right above the advanced search form.

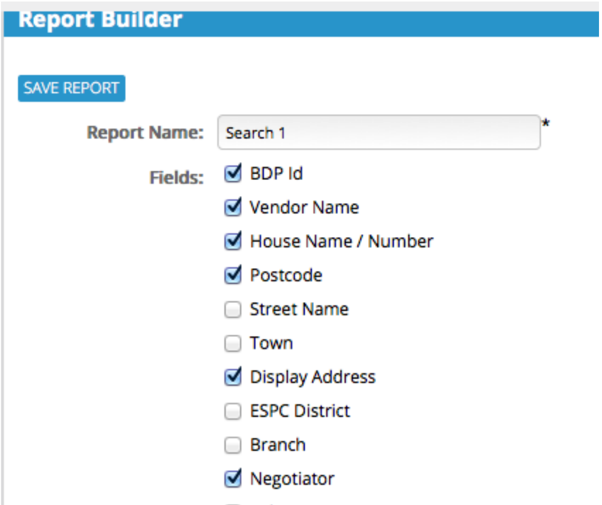

Figure 17. Select the fields to include in the report

You can then name the report and add as many different reports as you wish. Next, tick the fields you want to include in the report and save it.

You can then click the Excel icon next to the report you require and it will generate a CSV (Comma Separated Values) output of the advanced search you just performed with the fields included that you requested. This can be opened in Excel or any text editor or spreadsheet program.

Understanding the Property Screen – Basics

Property Header

The property detail page displays a fixed header box above the widgets containing key "at a glance" information.

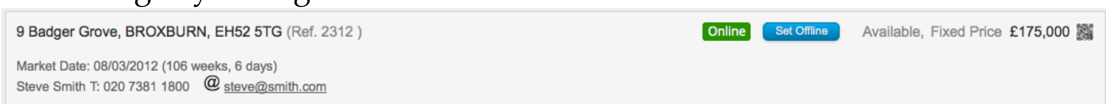

Figure 18. An example Property Header.

Information contained here includes:

- The full property address (not the display address)
- The BDP reference number. Quote this number in all support correspondence with BDP where the query relates to a particular property
- The online status and a button to toggle the property online and offline.
- The selling status, price qualifier and price
- A downloadable QR code which will, if using the BDP javaScript snippet to power your website, link to the property page on your website.

- The date the property went live on the market and the number of days or weeks it has been live.
- The phone number and email address of the primary vendor contact.
- An @ icon which, when clicked, enables you to send an email using the BDP email engine to the vendor. A record of the email will be stored against the property and vendor record.

The instructions below describe individual widgets which may be contained within different tabs and not necessarily all on the same screen. Your system administrator will have configured the Property Detail screen to suit your particular company's requirements. To locate any widget referred to below, you can use the Widget Search tool in the left-hand toolbar.

Address details widget

The Property Address widget contains the full address and postcode of the property as well as a field for Display Address. This is used in case you don't wish to display the full address on your website or on 3rd party portals, so you can add a display address instead.

NOTE: Zoopla requires the display address to be entered in three different parts, separated by commas. If this convention isn't followed, they will display the full address instead. EG. 12, High Street, Brackley is a valid Zoopla display address. High Street, Brackley or 12 High Street, Brackley isn't.

Clients of the ESPC in Edinburgh will also have a field for ESPC District to be entered here.

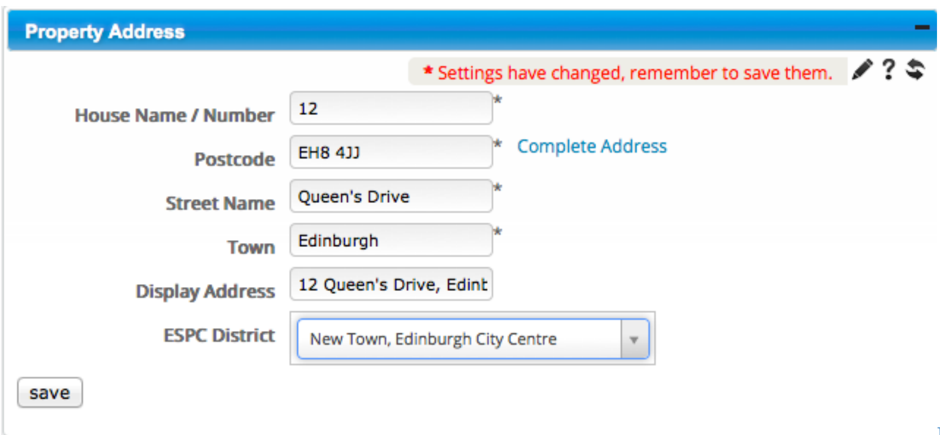

Figure 19. Address widget in edit mode.

When entering a new property for the first time using the New Property input form (see Figure 11), all address fields can be entered manually.

Using the "Complete Address" facility is entirely optional and should not be relied on for total accuracy. If in doubt, cross-refer with the Royal Mail website (http://royalmail.co.uk) and any other public data sources you may use.

Selling details widget

The Selling Details widget contains the following information (depending on configuration):

Market date
This is the date that the property first came on to the market. It is automatically set by the system to be the date when the property is first set to Online, however it can be overridden manually by entering edit mode and clicking in the date input box.

Home Report value (optional – Scotland only)
The value put on the property by the surveyor carrying out the Home Report (Scotland only). This field can be included in the client's website as part of the BDP output and can be accessed in email templates and Word document templates.

Sold date
This is the date that the status of the property in BDP is changed to Sold.

Sold price
This figure is manually entered and can be accessed by email and document templates and contributes to global firm statistics.

Date of Entry (Completion date)
Date of completion or conclusion of missives in Scotland.

Selling status
The selling status is set by choosing the appropriate item from the drop-down box. These entries conform to the BLM3 specification with the exception of "Withdrawn" and "Temp withdrawn" which are for ESPC clients in Scotland.

Price
The price the property is being marketed at. Displayed in the default currency as selected in the Account Configuration widget (Configuration menu).

Price qualifier

This is a drop-down list of price qualifiers that conforms to the BLM3 specification.

- Default
- Price on Application
- Guide Price
- Fixed Price
- Offers in Excess of
- OIRO
- Sale by Tender
- From
- Shared Ownership
- Offers Over
- Part Buy Part Rent
- Shared Equity
- Offers Around
- Price From

Images widget

BDP allows you to upload an unlimited number of images. These can be uploaded at full-quality (high-resolution) and BDP will automatically process the originals and output resized, optimised images to the user interface and to your website.

Images can be uploaded singly or, for IE 10 and greater and all other web browsers, many at one time. To upload multiple images,

- Click the Upload multiple images link in the Images widget.
- This opens the dialogue box shown below.
- Click Add files in the top left.
- This opens the file browser on your computer where you can navigate to where your photos are stored.
- To select multiple files, click the first file once, hold down the Ctrl key (Cmd on a Mac) and select all others you wish to include. Alternatively, if the required files are all together in a list, select the first file, hold the Shift key down and click the last in the list and this will select all in-between.
- Click Choose in the dialogue box. You will be returned to the uploader.
- Click Start Upload and all selected files will start to upload. Uploading time will depend on the size of the original photos (high-res originals will likely be large file sizes) and the speed of your internet connection.

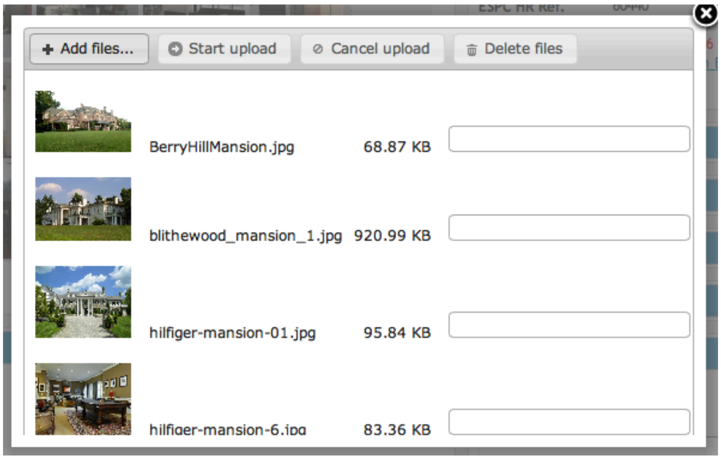

Figure 20. BDP multi-file uploader.

Property details widget

The contents of the Property Details widget will change depending on whether it is a sale or rental property.

Common fields are:

- Summary
- Description
- Number of bedrooms
- Number of bathrooms
- Number of living rooms
- Parking
- List of features
- EPC band

The exact fields displayed in this widget will have been configured by your administrator through the BDP config options panel.

Clicking the Edit link or icon will allow you to add and edit fields in this widget.

To add a summary or full description to a property, click the input box and a full text input panel will pop up. This will accept only paragraphs, headings, bold and italic text and will strip out all other code, according to BLM3 industry specifications.

NOTE: When adding text to any text editor input in BDP, including the Summary and Full Description text inputs, DO NOT paste content directly from MS Word. Word contains invisible formatting that can very easily break the display. Instead use Windows Notepad (Start > Accessories >

Notepad) or another plain text editor to create the content and cut/paste from there in plain text.

Scottish clients. It is mandatory to include the EPC band in all property marketing. You must select the appropriate band from the drop-down list in this widget.

If you are a **client of the ESPC** you will see a field for "ESPC Slogan". This is a 40-character text field that will appear on the showroom card and in all ESPC printed materials. The "Showroom Snippet" is now depreciated. If you see this input box please notify your BDP administrator.

Click the Save button when finished entering text into the text editor pop-up and click Save again at the bottom of the panel to commit your changes.

Documents widget

Property documents are distinct from the Document Store widget

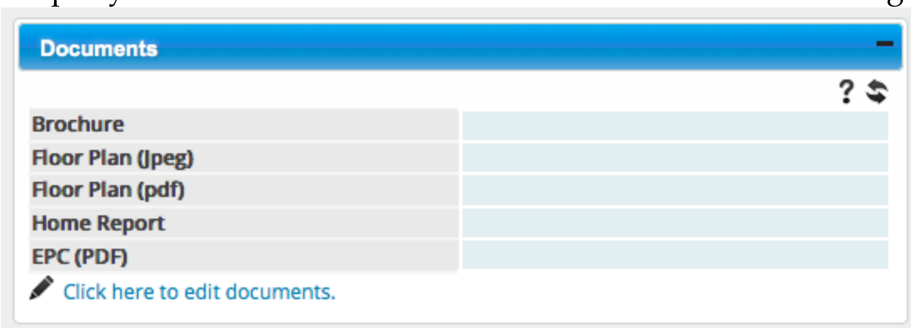

Figure 21. Property documents.

The documents panel is for attaching key documents to a particular property.

If powering your website with the **BDP jQuery Snippet** these documents are automatically included in the output on your website. If using the **BDP API**, you will decide with your web development team where this output is included.

- Brochure. This will make the PDF brochure available via the Brochure link on the front of your website.
- Floor plans (JPEG or PDF). Floor plans uploaded in JPEG or JPG format will appear in a special zoom-viewer linked to under the main property images in your website. The higher-resolution the originals you upload here, the better the outcome on your website. Floor plans uploaded as PDF will be available via the Floor Plans link on the property detail page of your website.

- Home Report (Scotland only). You have the option to upload the Home Report if you have it. If your Home Reports are handled by ESPC this will be automatically added to BDP for you.
- EPC graphs. Upload the Energy Performance Certificate here in PDF format.

All of these documents are fed to third-party portals according to the third-party's specification, except the Home Report.

Movie widget

If you are using property movies and you don't see the Movie Details widget, please ask your administrator to activate it.

There are currently two available fields (Shoothome ref. and Movie link), however please ask us if you wish to add a currently unsupported supplier.

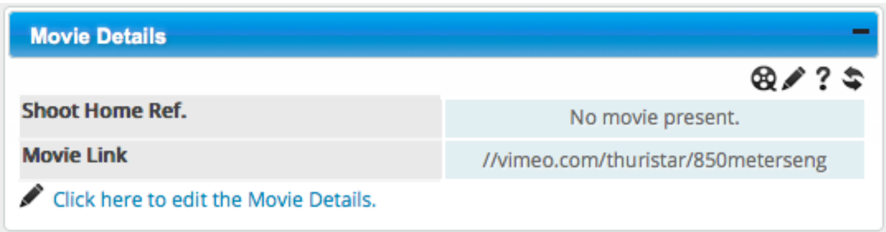

Figure 22. Property movie widget.

If using Shoothome it will supply a unique reference to you. This should be entered into the box provided and will cause an opaque "play" button to be overlaid on the property images when displayed in your website. Clicking this play button will cause the movie to pop up in a separate window overlay.

The Movie Link box can be used for movies from YouTube, Vimeo and other hosts. Simply paste the full video link into this box and it will appear as an overlaid movie player on top of the property details in your website.

The film reel icon in the top right of the widget previews the movie.

Property type widget

Select the property type from the lists here, which conforms with the BLM3 data standard and is compliant with third-party portals. The property types visible in this list can be changed by your BDP administrator.

For **customers of ESPC in Scotland**, please note that the ESPC property types don't match the BLM3 specification exactly therefore some type mapping is necessary. The closest available property type match will be used.

Rooms widget

BDP allows you to enter individual room dimensions into the Rooms widget. If you don't see this widget please ask your BDP Administrator to activate it.

In the widget, click to add rooms as required. Each entry requires a room name, optional description, and width and length measurements.

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

This is appended to the description in the BLM feed and is sent to the ESPC if you are a subscriber.

Owner details (Vendor) widget

A Vendor (owner) can be added in two ways:

- Via the "Add a new vendor" link on the Vendors listing screen (Contacts > Vendors menu)
- Via the Owner details widget in the property details page

Here we will look at adding an owner via the Owner Details widget.

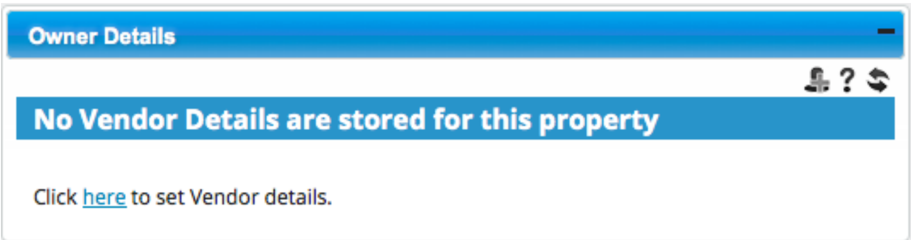

Figure 23. Empty Owner Details widget.

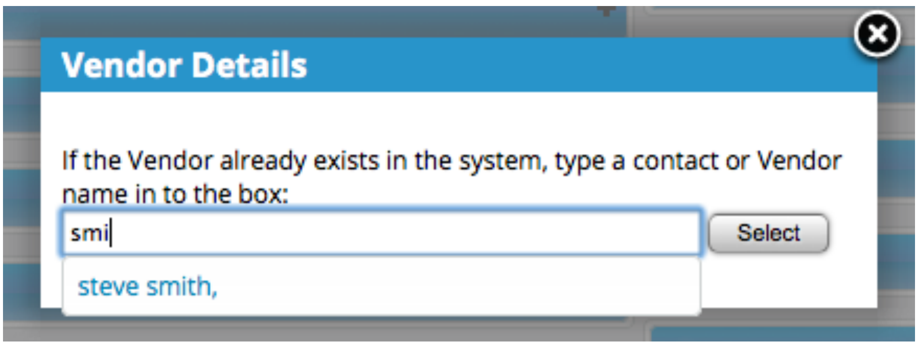

Figure 24. Using type-ahead to locate a vendor already in the database.

Clicking to add a new vendor in the Owner Details widget brings up the Vendor Details pop-up from where you can either search the database for an existing vendor to associate with this property, or you can click to add a new vendor.

If searching for an existing entry in the database, type the first three letters of the vendor name and 'type-ahead' will bring up all matches. The more letters you type, the narrower the results list. Once you have located the desired contact, click the name and that contact will become linked to the property.

If adding a new contact, complete the form with all available details. When finished click Proceed to add the vendor to the vendor database.

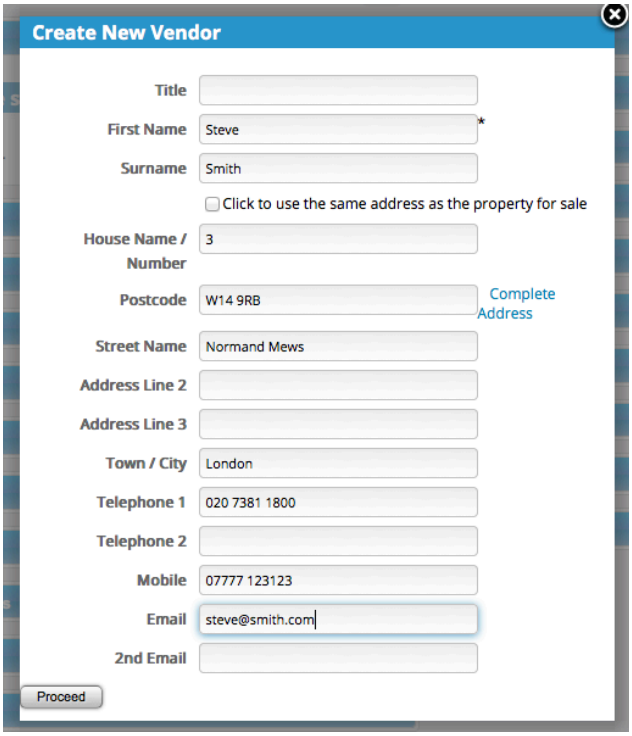

Figure 25. Create New Vendor input box.

NOTE: BDP treats all contacts as a "Group" comprising one or more individuals, or "contacts". This is because it is usual to buy or sell a property in joint names. BDP stores a "Primary contact", being the first point of contact for the group, however it also ensures that communication can be made with all members of the contact group. To assign a member of the group as Primary Contact, click the head and shoulders icon next to their entry.

A Vendor contact can also be added from the Contacts section. Click on either All Contacts or Vendors in the left-hand menu. Click the Plus icon in the top icon bar or the "Click here to add a new vendor" button.

When updating a vendor record, all properties that the vendor is linked to will display the updated information.

When editing the Vendor details, you can edit each individual contact within the vendor group, or you can edit the group itself.

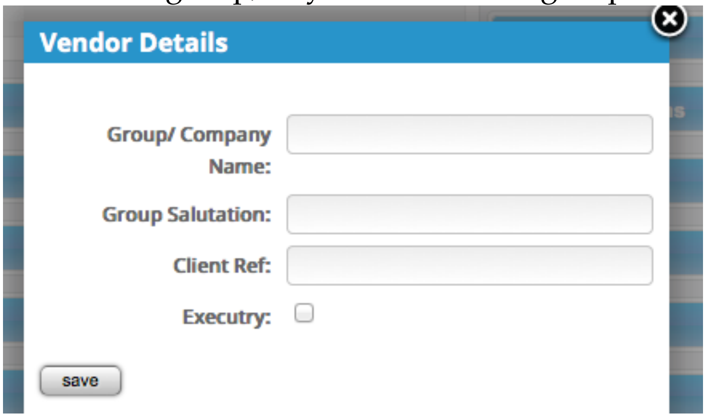

Figure 26. Adding information to the vendor group.

The Vendor Group can have its own name or the name of a company (for example ABC Housebuilders) which would have individual contacts within the firm. You can also insert a group salutation which takes priority over individual salutations of the group members. If the vendor is an executry, or deceased estate, tick the executry box. Finally, you can enter a client reference if required for internal use.

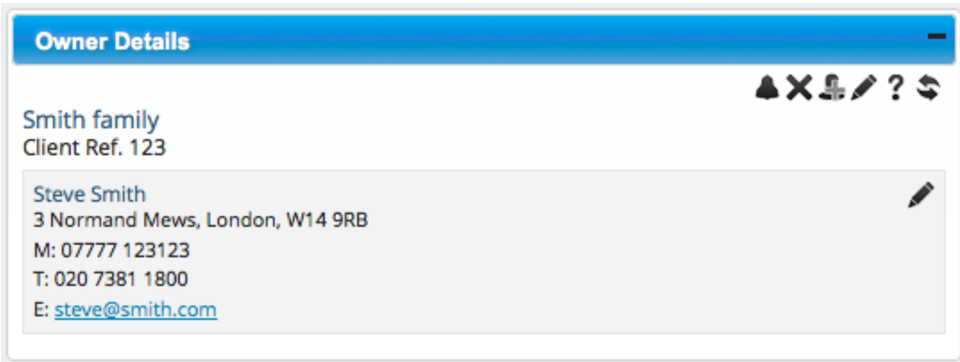

Figure 27. Vendor widget showing vendor group information.

Property Log Widget

The Property Log widget is a log of all events and communication relating to the property. It is a fully comprehensive audit trail that can be used to look back at the entire history of communication and activity. It also shows all automated events that the system has preformed, for example viewing confirmations, SMS messages, etc. If you have any doubt about whether something happened, the property log will tell you.

ESPC Home Reports Widget

For ESPC (Scotland) customers only.

Whenever an applicant requests a home report, either directly from the ESPC or via your website, and the fulfilment is handled by the ESPC, a record of this will appear in this widget. It can take up to 1 hour from the time of the request being made for this widget to update.

Rightmove Requests Widget

For Rightmove customers only

This displays a log of all requests for information received via Rightmove. Clicking the Head icon to the right of the contact details takes you to the applicant record where you can add to or edit their details and see other enquiries they have made.

Notepad Widget

The Notepad widget provides a "scratch pad" where general notes can be made. This is fully editable by all staff with property edit permissions.

Property Contacts Widget

The Property Contacts widget gives a list of all applicants who have asked for details about the property, who have received a home report (Scotland only), or who have made an offer or lodged a Note of Interest (Scotland only). If a formal note of interest has been lodged, then the applicant's solicitor's details are displayed here.

Figure 28. An entry from the Property Contacts widget.

By ticking the box next to each entry of interest in this widget, bulk actions can be performed. Currently these are sending an email to all selected and sending an SMS to all selected.

The icons to the right of each record allow you to email the applicant using your default email application, email the applicant via BDP and view and edit the applicant record.

Management Widget

The management widget is used to assign members of staff to the property as provided for by the BDP administrator. Any staff with the relevant role assigned will be available in the drop-down lists and can be selected. This ensures that automated messages set up in the system will reach the appropriate person or people.

Signs can also be ordered through the management widget. Your BDP administrator will configure the system so that clicking on the relevant icon at the top of the widget will send an order automatically. It is possible to

- Order a new sign
- Re-order a sign
- Request the sign be removed

There are input boxes in the management widget for

- Viewing information (times, restrictions, etc.)
- Key information (location of keys, alarm code, etc.)
- Sign information (sent to the sign company. Where the sign should be located)

You can set the default viewing contact for the property, however this can be changed on a case-by-case basis as necessary.

You can enter the agency term if this option is active on your account.

External Systems Widget

The External Systems widget controls the data feeds that the property is added to. The property can be removed from selected data feeds if required on a case-by-case basis.

External Systems

ESPC Feed	Yes
ESPC Renewal Confirmed	No
Rightmove	Yes
Zoopla	Yes
S1 Homes	Yes
ESPC	313888
ESPC HR Ref.	60440
ESPC Publish Date	31 May 2012
ESPC Expiry Date	03 Dec 2012 (0 days remaining)
ESPC Status	Active View on ESPC

Click here to edit details.

Figure 29. The External Systems widget.

For ESPC subscribers in Scotland the reference number, Home Report reference, publish date, expiry date and status will all be shown automatically. A link to enable the property to be viewed on the ESPC website is also provided.

Contact Notes Widget

There are three types of contact notes provided for in BDP:

- General contact note (green icon)
- Vendor contact note (orange icon)
- Applicant contact note (blue icon)

The General contact note is appended to the property record only.
The Vendor contact note is appended to the vendor record as well as the property record.
The Applicant contact note is appended to the applicant record as well as the property record.
When contact notes are appended to both a property and contact, they can be viewed on the property screen and the contact screen.

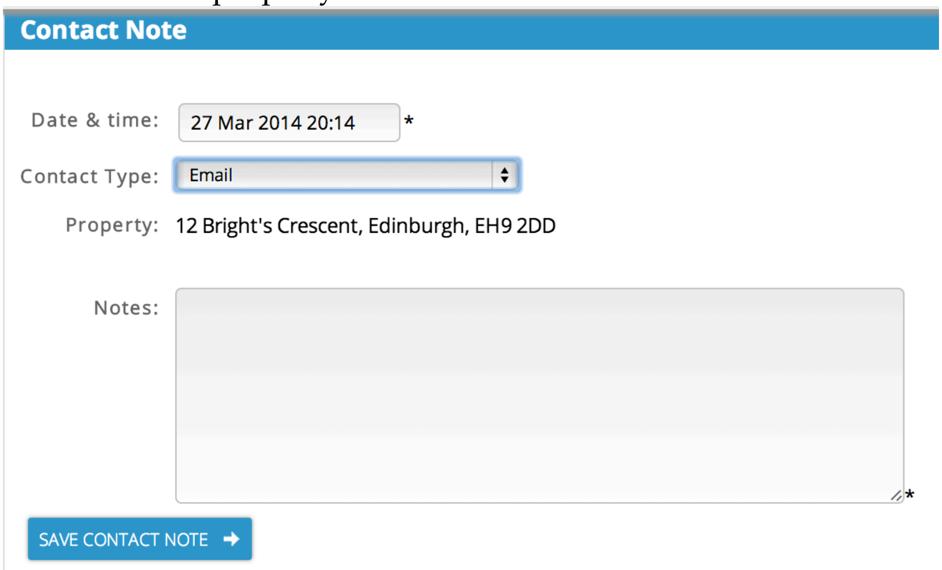

Figure 30. Adding a contact note.

To add a contact note, click the icon required and a panel appears. Clicking in the Date & time field brings up a date picker so you can choose a date and time other than the current. Click the drop-down box for contact type and choose from Email, Fax, in person, SMS or Telephone. Enter any notes and click the button to save the contact note.

Contact notes are either editable or not editable depending on the configuration you BDP manager has selected.

Viewings Tab

The Viewing tab displays a single, full-width widget that contains a list of all viewings of the property, both past and future.

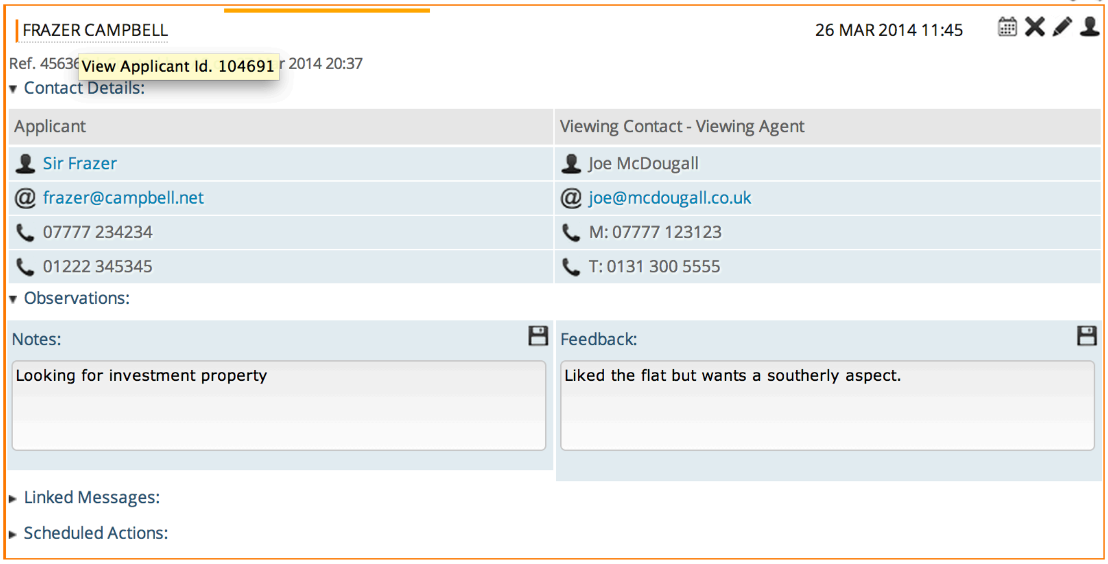

Figure 31. Example of an entry in the viewings widget.

Looking at the example above you can see the applicant's name, BDP reference number and a record of the date and time the record was created, as well as the initials of the member of staff who created it.

- To the right at the top the viewing time and date is displayed.
- To the right of that, the calendar icon must be clicked to confirm the viewing, and when this has been done the icon turns green and a green bar is displayed above the applicant name.
- Clicking the X icon cancels the viewing.
- Clicking the pencil icon edits the viewing.
- Clicking the head icon takes you to the applicant's record in the database.

The contact details are displayed below comprising at-a-glance contact information for the applicant and for the viewing contact.

The two panels below are for notes and feedback. Information can be entered directly into these panels and saved by clicking the save icon above each.

Linked messages are shown below. Clicking the title opens the content area. This contains a list of all messages sent pertaining to this viewing, including automated messages sent by BDP. If you are in any doubt as to whether a message has been sent to either the applicant or viewing contact, you should check here.

Scheduled Actions are at the bottom. Clicking this title opens the panel to show any emails or actions that are scheduled for the future. For example, if you have a rule to send a viewing reminder two hours before the viewing, and the viewing is in four days time, the scheduled item will show here until it is triggered, then it will disappear. This enables you to see quickly what messages may be in the queue at any given time.

Offers Tab

Coming soon.

Datafeeds & External Systems

ESPC Datafeed (Scotland only)

BDP sends a data feed to ESPC once every 30 minutes as it can take ESPC up to 15 minutes to process this, therefore you should wait for half an hour before querying a property appearance on ESPC.

There are a number of actions which must be carried out in the ESPC member portal including:

- Confirm and market property
- Link or upload Home Report
- Add Limelight
- Purchase a repeat
- Change status
- Enter selling price.

Please refer to the latest ESPC /BDP documentation for full details:
https://bdphq.com/downloads/espc_datafeed_cribsheet_2.0.0.pdf

Rightmove, S1, Zoopla

Third party portals are able to accept data feeds at different frequencies depending on their own systems. BDP endeavours to send feeds as frequently as possible, but we are governed by the receiving system.

Rightmove: Currently we feed in the BLM3 standard every hour. We will shortly be converting to Rightmove Live feed which will be almost instant.

S1 Homes: We feed once per day.

Zoopla: We feed twice per day. Zoopla live feed will be active in late 2014 or ealy 2015.

The first time BDP feeds a property to any third-party portal it sends a "full media" feed, meaning that all photographs and attached documents are also sent. Thereafter we just send plain text data. If for any reason the media aren't appearing on the third-party portal, you need to clear the cache on the property in BDP and it will resend the full media. You can do this quickly and easily by moving the photographs around to a new order before returning them to the original order. This makes BDP think something has changed causing it to resend all media.

Rightmove has an automated feedback system so that any errors in the feed are automatically reported to BDP and the application will resend the media without any human intervention.

ESPC Home Report Data

This is updated in BDP every 15 minutes. This does not take into account the length of time it takes ESPC to publish the data internally.

Rightmove Email Information

This is collected every 15 minutes.

Rightmove Stats

These are collected every 24 hours.

Understanding the Property Screen – Advanced

Fee Calculator widget

The fee calculator is used to provide template-based calculations for all aspects of buying and selling a property so that these fees can be presented to the vendor or purchaser in an email or document as required.

The fee parts and amounts (fixed price, percentage-based, sliding scale, etc.) are set up by your BDP administrator and any calculations are based on the selling price or purchase price of the property. The figures generated by BDP can be individually overridden in the Fee Calculator widget and the resulting values can be used in document merging.

Document Store widget

The Document Store widget is used to both generate template-based documents and to upload existing documents from your hard drive or network.

Templates can be set up by your BDP administrator.

Figure 32. The BDP Document store

The document store widget contains a set of icons that relate to the document store itself, and a set of icons that relate to each individual document within the store.

The top-most icons relate to the document store itself and their functions are:

- The @ symbol – send an email to the vendor with a document from the document store attached. Select which document from a drop-down presented when this icon is clicked.
- The W (Word) icon – generate a new Word document based on a template (previously uploaded to BDP by your BDP administrator)
- The Up-arrow icon – upload a document that's on your hard drive or local network to BDP for storing with this property record

To the right of every document in the document store is a set of icons to

- Download as a Word file
- Download as a PDF
- Delete from the Document store

Note. If you upload a document to the Document Store, it will only be available to download in its original file format. BDP is unable to convert uploaded Word documents to PDF, etc.

Statistics widget

The statistics widget shows a summary of views from Rightmove (if you're a Rightmove subscriber) and your own website (if you're using the BDP snippet to power your website or if your developer has used the data feedback module in the BDP API). For Scottish clients, ESPC statistics are coming soon.

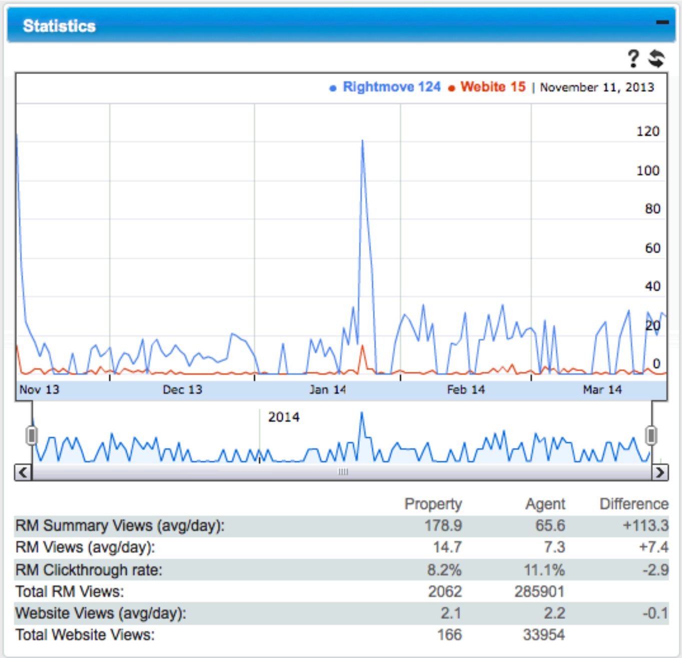

Figure 33. The Statictics widget.

The timeline can be changed by dragging the handles in the bottom time-line graph.

Property to Applicants Matching

BDP allows you to perform a search of all applicants in your database with search criteria that match the property you're currently looking at. To use this feature, click the Find Buyers icon in the Tools menu, or click the Find Buyers icon at the top of the screen.

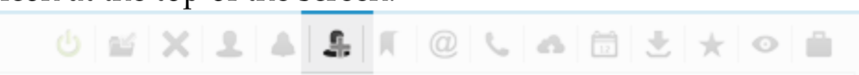

Figure 34. The Find Buyers icon.

This searches your applicant database for all applicants with a saved search that contains matching criteria and it displays a list of these applicants in a slide-out panel. Tick those applicants you wish to include in the email send-out and click Send to Selected. This sends a property information email based on a template set up by your BDP administrator. Any applicants previously emailed will be excluded, however if you wish to also see those names, click the Previously contacted icon at the bottom. Only applicants who have consented and supplied an email address are available for selection.

Purchasing a Home Report from ESPC

Scottish customers only.

Figure 35. The Home Report ordering button.

In the Tools panel or in the icon bar at the top of the screen, click the briefcase icon. This opens a pop-up window with the ESPC member portal contained in it. If you are logged in you will be taken directly to the relevant property on the ESPC portal. If you're not logged in, you will be asked to log in first before being redirected to the relevant page.

If you have selected the surveyor in the Management widget, this information is pre-populated in the Home Report ordering form on ESPC.

The Home Report form on ESPC is pre-populated. The Home Report is automatically linked to the property when it adding to ESPC.

Google Maps widget

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.

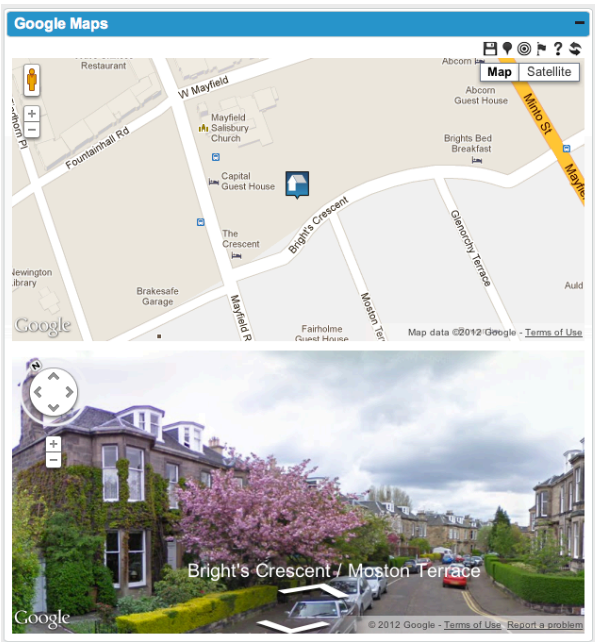

Figure 36. The Google Maps widget.

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. Clicking 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

Note: If you prefer a satellite view instead of a map, simply change the Google Maps view to Satellite and save. This will display the satellite image in your website instead of the map.

Appointments

Creating appointments from the Dashboard Calendar

The Calendar widget on the dashboard displays a full-width calendar which has three views: Day, Week and Month. It is designed to function in a similar manner to Microsoft's Outlook calendar and should be familiar to most users.

To create a new event, simply click in the calendar on the date and approximate time required. This can be changed or refined, so don't worry about clicking exactly in the right place.

You are then able to select from four event types:

- Closing date (for Scottish clients)
- Misc
- Valuation
- Viewing

N.B. More event types may be added in future.

Closing date

Click in the date field and a calendar pops up to enable you to precisely control the date and time.

Type any part of the property address into the address box and BDP will suggest address matches as you type. Click the property you are interested in and its address will be inserted into the box.

Type any notes into the free-text notes field and save the event.

The event will now appear in the calendar and in the property record. You can also use the Business Rules tools to trigger the creation of documents, emails, SMS, etc. on creation of a Closing Date event.

Misc event

A miscellaneous event allows you to add a non-specific event to the calendar which will be in your name and can't be assigned to another user. It allows for the addition of a property, an applicant and buying search details, all of which will be added to the record in the relevant place, i.e. to the property record if a property address is inserted and to the applicant record if an applicant is entered.

As with all calendar events, you can associate business rules with them to trigger automatic events in the system.

Valuation

Adding a valuation allows you to assign a valuation agent to the event, which will then appear in the calendar colour-coded to their name. It allows addition of all the fields in the Misc event with the addition of the ability to assign the event to a valuation agent.

Viewing

See Valuation

Creating a Viewing from a Property

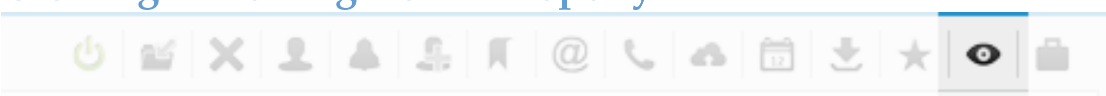

Figure 37. The New Viewing icon.

Viewings can be created directly from the property details screen. Click the eye icon in the top icon bar, or click the New Viewing entry in the Tools menu on the left.

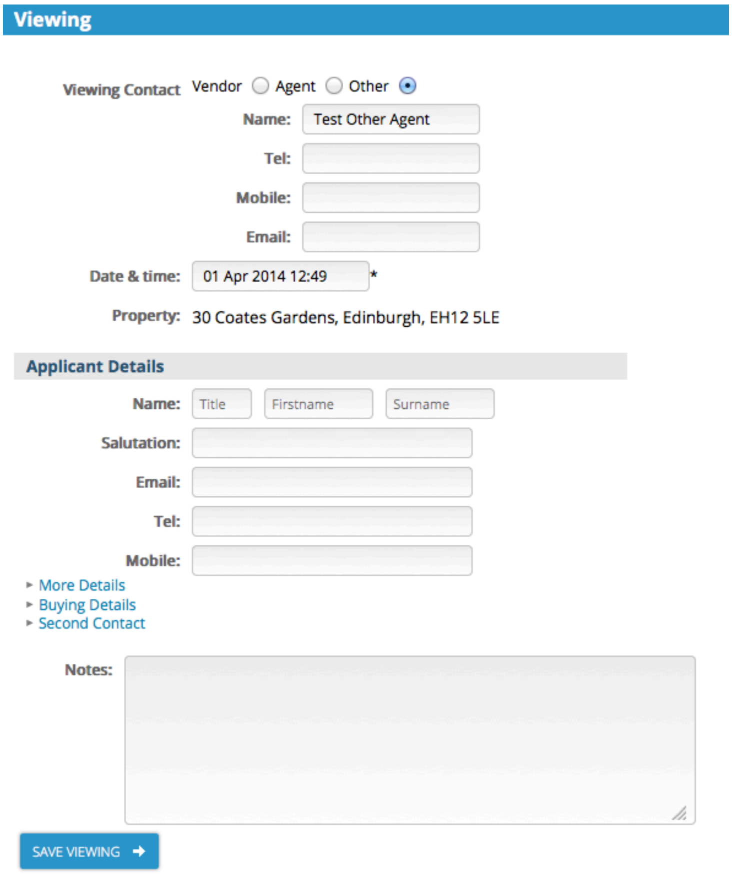

Figure 38. New Viewing pop-out panel.

First select the person who will be conducting the viewing. This can be the vendor themselves, an agent or a manually inserted individual. If choosing an agent, a drop-down list of available agents will be shown.

Next choose the date and time for the viewing. Clicking in the date/time input box brings up the date picker. You can manually edit these details.

Next enter the applicant details. If the applicant is already in the database, type the first three letters of either their first name or surname and BDP's type-ahead function will bring up a list of all matches. If they don't exist already, just fill in the full details.

More details

Fill in additional applicant details in this section, including whether the applicant wishes to receive SMS and/or email updates. By default both are ticked. It is important to advise the applicant that viewing updates and other important information are sent by email and/or SMS.

Buying details

You can enter search criteria here for the applicant including minimum and maximum price, minimum number of bedrooms, etc.

Second contact

If the applicant is purchasing jointly or there is another contact who needs to be kept updated, you can enter their details here. Please refer to Applicants.

Creating appointments from the Contacts section

NOTE: For a detailed explanation of the Contacts section and the Customer Relationship Management functionality of BDP, refer to Managing the CRM (Customer Relationship Management)

To create a new viewing from an Applicant record, when looking at the applicant record, click New Viewing in the tools menu in the left hand column or click the eye icon in the top icon bar.

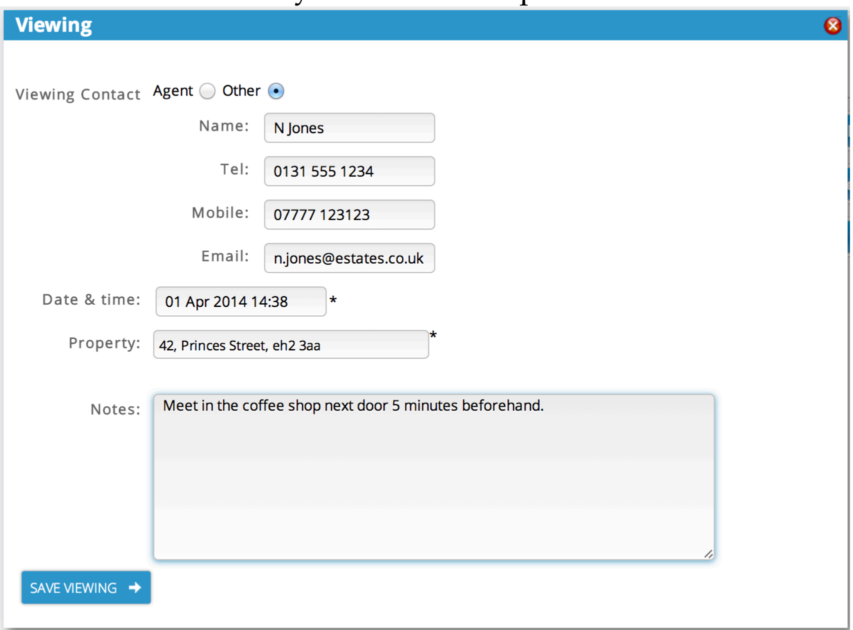

Figure 39. Create viewing from applicant record.

To enter the property to be viewed, type the first three characters of the street name and the type-ahead will find all matching addresses. Select the property required from the list.

This creates a new viewing in the calendar and in the viewings tab.

Depending on your BDP configuration, locating the viewing in the Viewings tab and confirming it will trigger any automated rules linked to the action, *sending out viewing confirmation emails, SMS, etc. Your BDP administrator will advise you on what rules will fire at what time.*

Creating a Viewing

See Creating Appointments from the Contacts section above

Creating a Valuation/ Appraisal

Figure 40. The Create Valuation/Appraisal icon.

You can create a valuation or appraisal appointment from the Tools menu on the left or from the icon bar at the top only when the property is **marked as Pre-valuation or Pre-takeon**. Once a property is live and moves to For Sale, Available, or any other post-valuation status, this option disappears.

Clicking the icon reveals the slide-out panel where you can assign the valuation to any member of staff who is marked as a Valuer in the system. See your BDP system administrator for assigning roles to staff. Once the Valuation is created it is added to the calendar, and any automated rules that are set up for a valuation will fire.

Creating an Offer

To create an offer for a property, on the property detail page click in the tools menu to the left or in the icon bar at the top.

Figure 41. The New Offer icon.

This reveals the New Offer slide out panel.

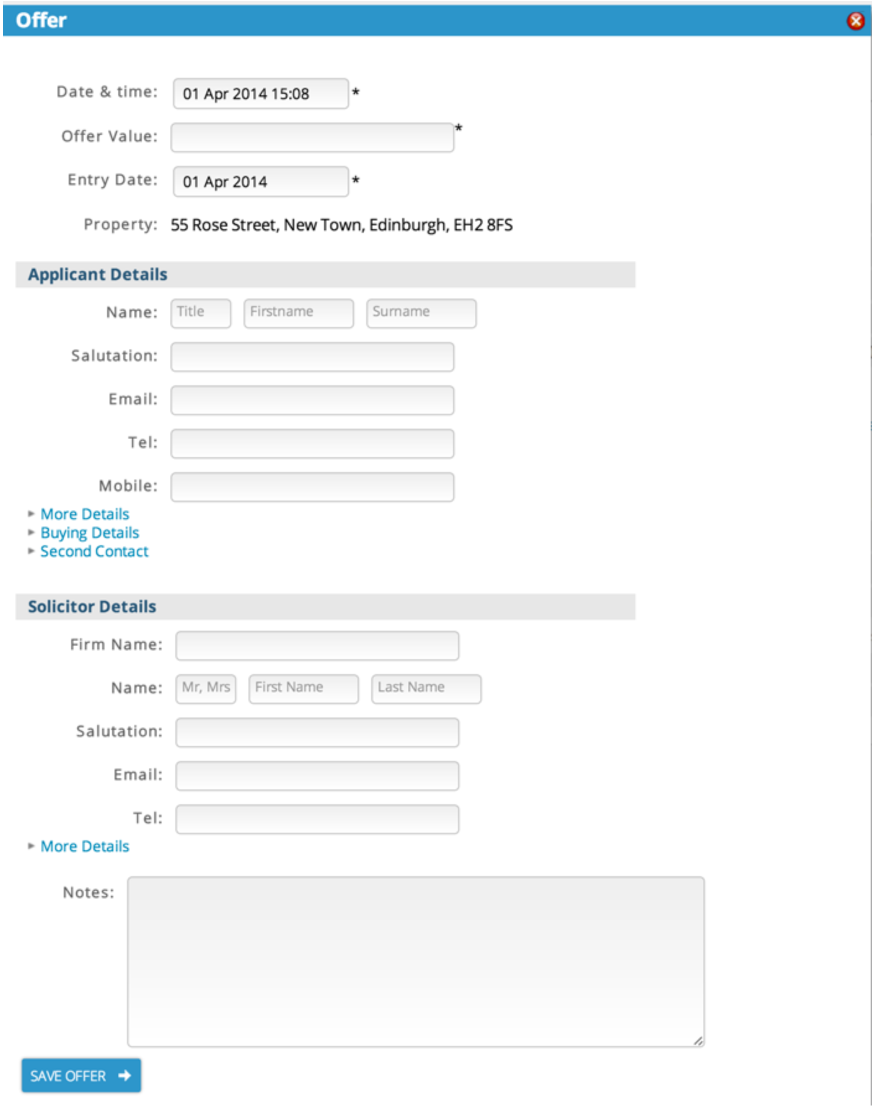

Figure 42. The New Offer slide-out panel.

Enter the date and time of the offer. Default is current date/time.
Enter the offer value. Don't use a currency symbol as currency is already configured by your BDP administrator.
Enter the Entry Date, otherwise known as Completion date, if known, or enter an estimate if required.
Enter the applicant details by using the BDP type-ahead function to search for the applicant if they exist in the database already, or if this is a new applicant, enter the details in full.
Under More Details you can enter the applicant's full address and their mailing preferences.
You can enter the applicant's search criteria if required and the details of a second or joint applicant if applicable.
You can then enter the applicant's solicitor's details using the type-ahead search function to locate the solicitor if they are already in your database, or type the details in full if not.
Complete any notes regarding the offer and save.

Saving the offer is an event in BDP and will trigger any automated documents or emails your administrator may have set up.

The offer will be listed in the Offers widget and if you are a Scottish client, all future correspondence will be directed to the solicitor and not to the applicant.

Creating a Note Of Interest

Scotland Only

To create a Note of Interest either click the entry in the tools menu in the left-hand column or click the Note of Interest icon in the icon bar.

Figure 43. The Note of Interest icon.

This opens the sliding panel where you fill-in the details of the Note of Interest.

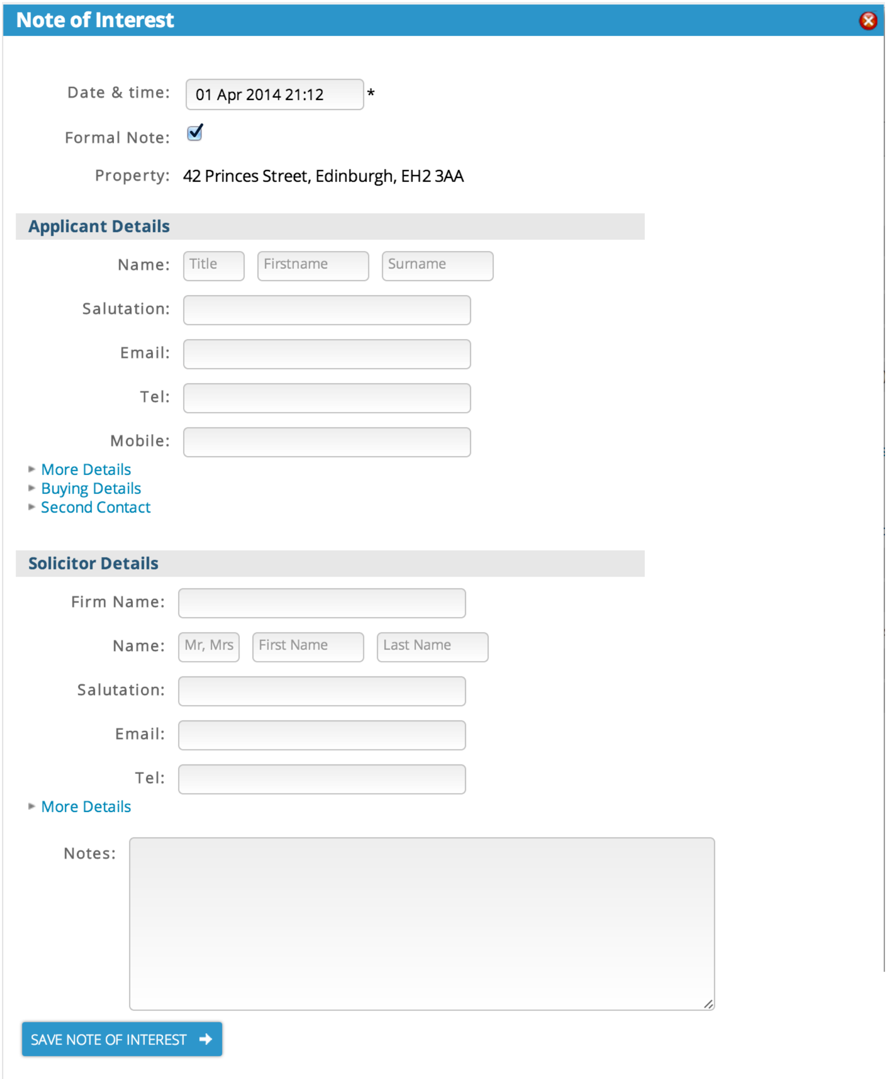

Figure 44. The Note of Interest panel.

Enter the date and time of the note of interest if different from the current date and time.
If the Note of Interest is formal, tick the box. Note that by creating a Formal note of Interest, all correspondence from BDP will be directed to the applicant's solicitor in accordance with Scottish law.
Enter the applicant's details. Typing the first three characters of the applicant's name will invoke BDP's type-ahead feature which will enable you to select the applicant from the list presented. If this is a new applicant, enter the details in full.
You can fill-in the More details section with the applicant's full address, communication preferences, etc.
The Buying details section can be optionally completed with details of the applicant's buying criteria.
If the applicant is applying jointly or if there is a second associated applicant, fill in their details in the Second Contact section.
Complete the Solicitor details section if this is a Formal Note of Interest. If the solicitor exists in your contacts database, the type-ahead function will pull up all matches after you have typed the first three letters of the name. You can then select from the list of matching names. If the solicitor is not in the database, complete all the fields.
When you have added any notes, click Save.

Clicking save triggers an event and any rules set up by your BDP administrator will fire at this point.

Creating a Closing Date

Scotland only
To set a closing date click Closing Date in the left hand tools, or click the Closing Date icon in the icon bar.

Figure 45. Closing Date icon.

This brings up a sliding panel where you can enter the closing date and any notes. If a closing date has already been set, clicking this icon enables you to edit it.

Sending Emails & Logging Communication

Sending Emails to Vendors

From the property detail screen, click the Send Email entry in the tools menu in the left hand column, or click the Send Email icon in the icon bar.

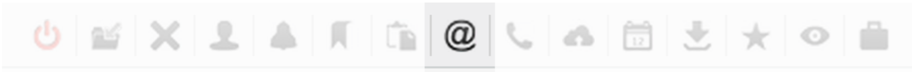

Figure 46. Send email icon.

This reveals the sliding panel.

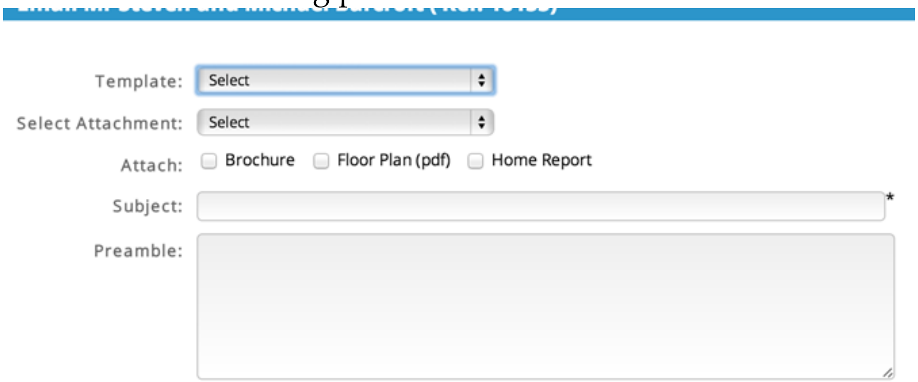

Figure 47. Send email panel.

- First select the template on which you wish to base the email. Your BDP administrator will have configured a selection of templates for different situations.
- If you wish to attach a document from the Document Store, you can choose it from the drop-down list.
- If you wish to attach any standard document from the Documents widget, tick the appropriate box. Customers of the ESPC in Scotland can also choose to attach the Home Report.
- Enter an email subject and enter any customised content required into the Preamble box.
- Note that depending on the template you select, you will need to add the appropriate salutation, or this may be present in the template. Your administrator will advise you accordingly.
- Clicking the Send button will send the email to the Vendor and it will be logged in the Property Log

You can also send the vendor an email from the vendor contact record by clicking the Send Email entry in the tools menu or the Send Email icon in the icon bar. This brings up the sliding panel described above.

Sending Emails to Applicants

You can email an applicant using the following methods:

From the Applicant record in the contacts database:

Click the Send Email link in the tools menu in the left hand column or click the @ icon in the icon bar. The slide-out panel is shown and is filled in per the instructions above.

From the Viewings widget:

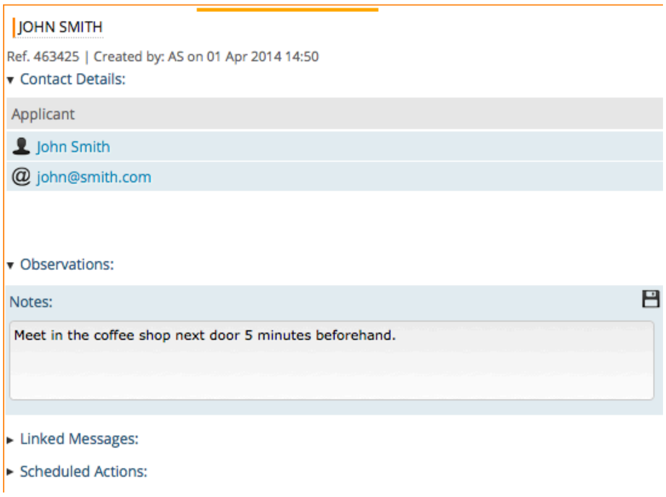

Figure 48. The Applicant entry in the viewings widget.

Click the @ icon next to the applicant's email address. This opens the sliding panel as above.
Do not click the email address itself as this invokes your default email application and will send an email outside the BDP environment.

From the Property Contacts widget in the property detail screen:

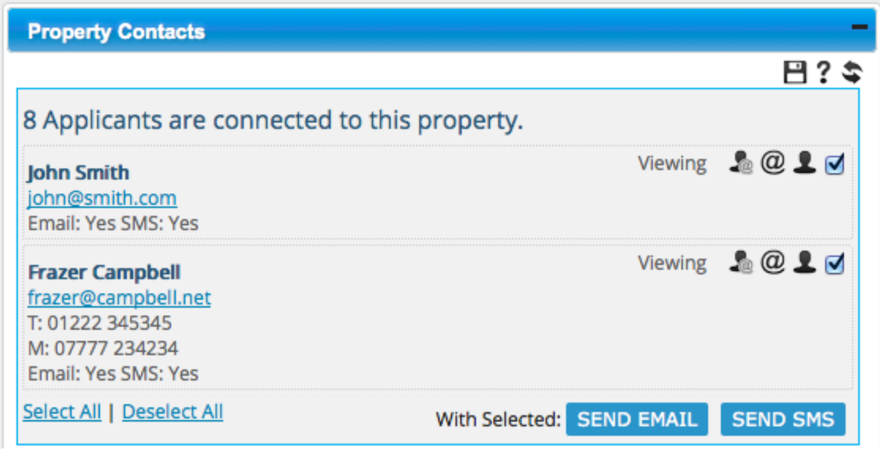

Figure 49. The Property Contacts widget.

You can send emails to applicants individually by clicking the @ icon next to each entry in the list. Alternatively you can tick each applicant you wish to email and click the Send Email button at the bottom of the list. This invokes the sliding panel and allows you to fill in the preamble text you require. It uses the default, blank template configured in your account.

This same method can be used to send an SMS to one or more applicants.

Sending Emails to Colleagues

This functionality has not yet been released.

Storing Contact Notes against Properties and Contacts

Also see Contact Notes Widget

There are three types of contact notes available in BDP:

- A general contact note
- A Vendor contact note
- An Applicant contact note

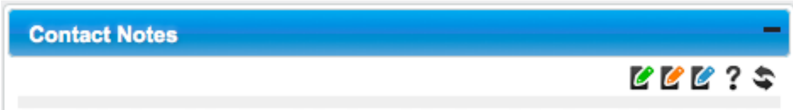

Figure 50. The Contact Note widget.

The green pen icon creates a general contact note
The orange pen icon creates a Vendor contact note
The blue pen icon creates an Applicant contact note.

A General contact note is stored against the property record but doesn't appear anywhere else other than in the Contact Notes widget on the property detail screen.

A Vendor contact note appears on the vendor record in the contact notes widget as well as in the property page contact notes widget.

An Applicant contact note appears on the applicant's record in the contact notes widget as well as on the property page contact notes widget.

Sending SMS

SMS can be sent to applicants and solicitors by going to the Property Contacts widget, ticking the contacts you wish to send an SMS to, clicking the Send SMS button at the bottom of the list, and filling in the text box in the sliding panel.

Rule based emails and SMS

If your BDP administrator has set up rule-based emails and SMS, then these will be triggered automatically at the appropriate time. See your administrator for details.

Managing the CRM (Customer Relationship Management)

Contact Types: Applicants, Vendors, Solicitors, Purchasers, Suppliers

There are various different types of contacts and the widgets displayed will vary depending on the contact type. The basic contact types are:

- Applicants – People looking to buy a property.
- Vendors – people with property to sell
- Solicitors – People acting for buyers and sellers of property
- Agents – Optional group type used by property search firms and some members of property networks.
- Suppliers – Used primarily for Lettings. These are suppliers who carry out work on behalf of the contact.
- Purchasers – Optional group type used by Solicitor Agents in Scotland where they are acting for the buyer

Creating a Contact

To create a new contact either:

- Click on All in the Contacts menu, then click the Plus icon to the top right of the search box, or
- Click the "Click here to add a new client" button to the top left of the search box.
- Click on the contact category you wish to add to and follow the directions above to add a contact of that category.

If adding a new contact from the All contacts section, choose the contact category from the pop-up box. You will then be presented with a form to complete and the new contact will be added to the category chosen. If you add a new contact from within a specific contact category, you will see the form immediately and you won't be asked to select the category.

Archiving & Deleting

To archive a contact, click the Archive icon in the Tools menu or in the icon bar. The contact is not removed from BDP, just rendered invisible. To find an archived contact, perform a search with the "Include archived" tick-box ticked. You can then un-archive the contact by clicking the same icon.

To delete a contact, click the X next to their name in the contact listing, or click Delete Contact in the Tools menu, or click the delete icon in the icon bar.

Searching for contacts

To search for a contact either:
Use the Quick Search box in the header bar, making sure that the people search is selected – The head and shoulders icon should be highlighted.
Or use the advanced search box above the applicant list. Depending on the contact type you will be presented with appropriate advanced search tools.

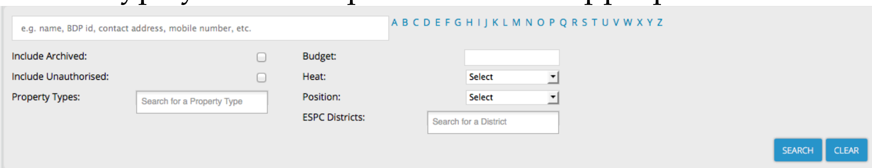

Figure 51. The Advanced contact search tools.

Categorising Applicants

Applicants can have two categorisations assigned to them:

- Buying status
- Heat indicator

The status of an applicant is instantly visible in the applicants list without having to go in to the individual applicant's record.

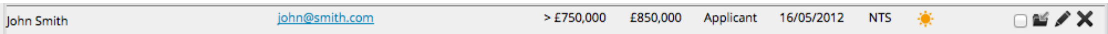

Figure 52. Entry in the Applicant list showing heat and status.

Buying status.

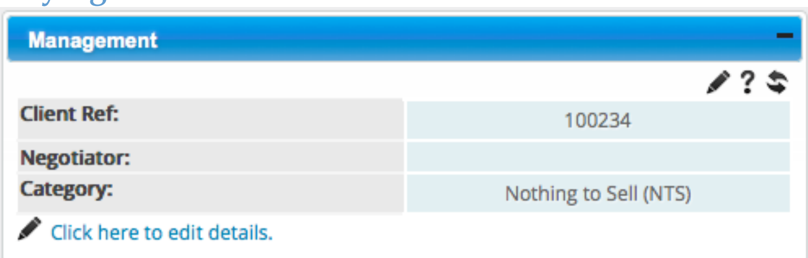

Figure 53. The Management widget.

This is managed in the Management widget in the applicant's record, and is represented by initials as follows:

- U- Status unknown
- POM – Property On Market
- NOM – Not On Market
- UO – Under Offer
- NTS – Nothing To Sell
- PTS – Property To Sell

Heat indicator

This is a four-stage rotating icon which changes each time it is clicked. The four stages are

- Cold – a blue snowflake.
- Tepid – a yellow star
- Warm – an orange sun
- Hot – a red flame

The icon can be clicked either in the applicants list or in the applicant's record where it is located in the summary information above the widgets.

Understanding the Contacts Screen.

Contact details

All types of contact contain a Contact Details widget. This is where the name, address, telephone numbers and email is entered.

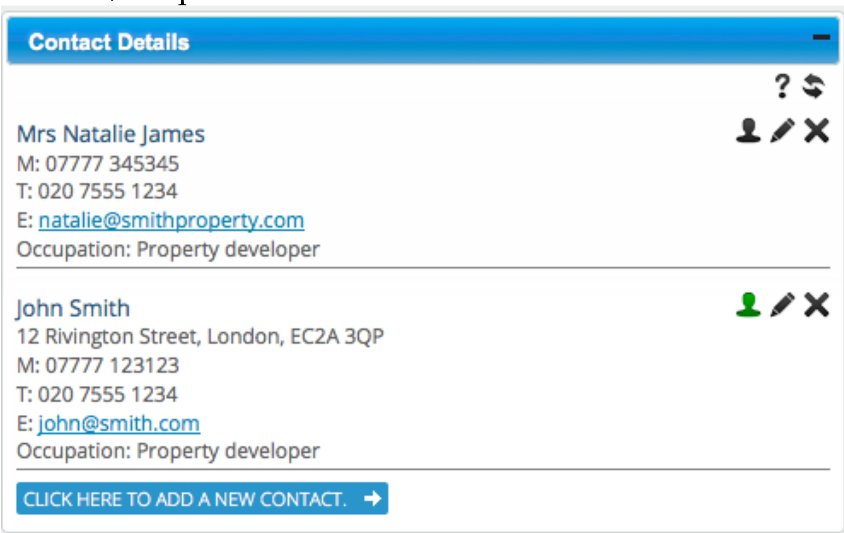

Figure 54. The Contact Details widget.

The most important concept of the Contact Details widget to understand is that a "Contact" is in fact a group comprising one or more individuals. By adopting this concept we can create joint and multiple applicants in the same record, and easily attach them jointly to any property they may be buying or selling.

Each group has a primary contact denoted by a green head-and-shoulders icon. Correspondence will normally be addressed to the primary contact. To define a different contact as the Primary Contact, click its black head-and-shoulders icon.

You can add as many contacts to a contact group as you wish, however there may be limits in the setup of any templates that extract contact information, so check with your BDP administrator if you have a large contact group.

Buying details

This widget is used in an Applicant's record to add search criteria.

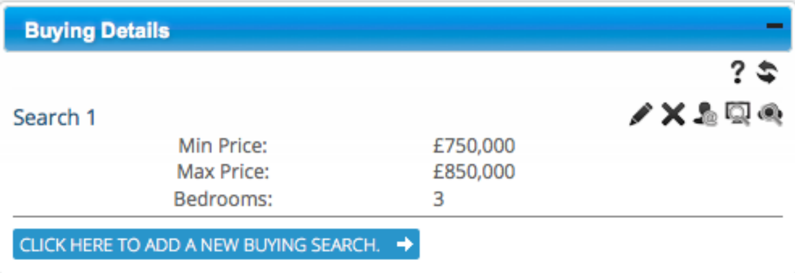

Figure 55. The Buying Details widget.

You can add multiple searches to an applicant's record.

There is a set of icons next to each search. From left to right they are as follows:

- Edit the search
- Delete the search
- Perform a search based on the criteria and email the results to the applicant or all members of the applicant group if there are multiple applicants
- Search BDP for all matching properties and display a list on screen. This will show all property whether online or offline, pre-market, sold, etc., but not archived.
- Search my website for all matching properties, which will only display online properties visible to the public.

Notepad

The notepad is used to write free-text notes against the contact's record which can be edited by any BDP user.

Management

The management widget allows you to:

- Assign a client reference. This is useful if BDP is communicating with other office systems or if you require a dedicated client reference number other than the BDP-assigned internal reference number.
- Assign a negotiator. If your business requires each negotiator to be responsible for his or her own applicants, you can assign the negotiator here.
- Set the buying status of the applicant.

Figure 56. The Management widget.

General Troubleshooting & Support

Actioned something and no change on screen.

If you have clicked a button in BDP to action something, for example putting a property online by clicking the Set Online button, and nothing has changed the likelihood is that network traffic is causing a delay. To see whether your action was successful DO NOT CLICK THE BUTTON AGAIN as this will resend the command, which may either undo the action you have just requested, or will trigger the action multiple times. Instead, refresh the page.

On a Windows PC, F5 will refresh the screen.
On a Mac Cmd + R will refresh the screen.

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