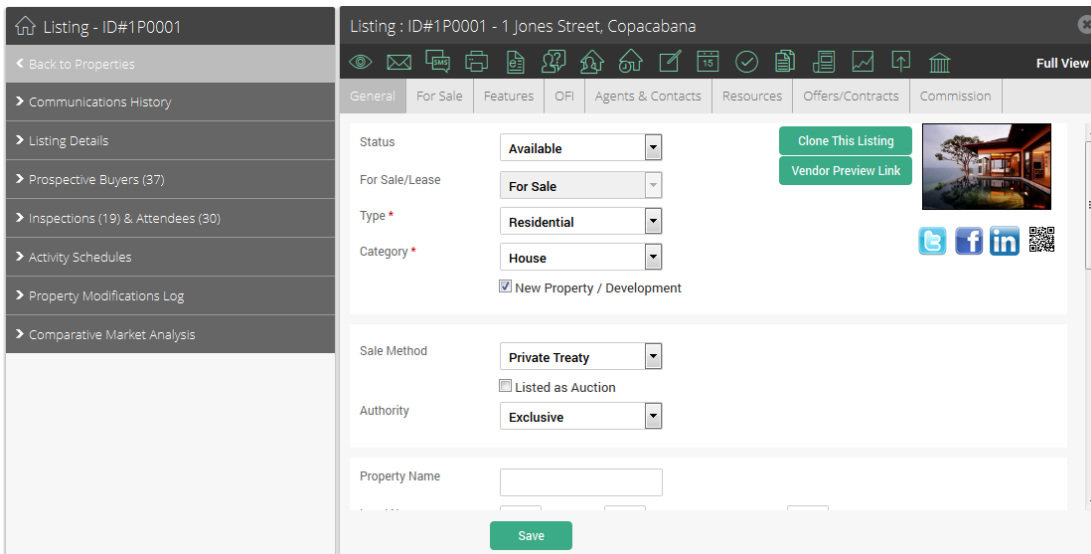
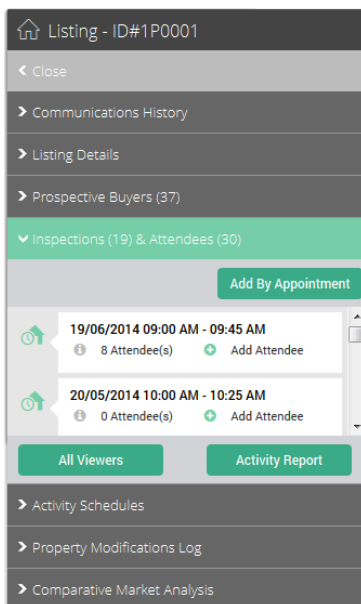


Creating a Vendor Report (aka Activity Report)

1. Search for your Property and open the property card



2. On the left panel click the Inspections & Attendees OR Prospective Buyers tab (If the matching left panel is not visible, click Full View in the top right-hand corner of the Property Card)



3. Click the All Viewers (if in Inspection & Attendees) OR Contacts / Follow Up (if in Prospective Buyers) button to open the Viewers panel

Contact	Last Activity	Source	#Enq	#Insp	#Offer	Interest	Contract Taken	\$Feedback	Ongoing Interest	Follow Up	+ Add Contact
Alexander Tanner	19/06/2014	Newspaper	0	1	0	Warm	<input checked="" type="checkbox"/>	875,000	<input checked="" type="checkbox"/>	<input type="checkbox"/>	+ Quick Action
Andrew Stead	08/10/2013	Newspaper	0	1	0	Hot	<input type="checkbox"/>	1,040,000	<input checked="" type="checkbox"/>	<input type="checkbox"/>	+ Quick Action
Bob Thomas	10/12/2013	Word Of Mouth	0	4	0	Hot	<input type="checkbox"/>	1,100,000	<input checked="" type="checkbox"/>	<input type="checkbox"/>	+ Quick Action
Danielle Hunt	08/10/2013	+ Add	0	1	0	+ Add	<input type="checkbox"/>	0	<input type="checkbox"/>	<input type="checkbox"/>	+ Quick Action
Gabe Knowles	05/11/2011	Database	0	1	0	Warm	<input type="checkbox"/>	1,250,000	<input type="checkbox"/>	<input type="checkbox"/>	+ Quick Action
George Smith	19/12/2013	+ Add	0	1	0	+ Add	<input type="checkbox"/>	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	+ Quick Action
Harry Crane	05/11/2011	Realestate.com.au	0	1	0	Cold	<input type="checkbox"/>	1,205,000	<input type="checkbox"/>	<input type="checkbox"/>	+ Quick Action
Helen Davies	19/06/2014	Domain.com.au	1	2	0	+ Add	<input type="checkbox"/>	0	<input type="checkbox"/>	<input type="checkbox"/>	+ Quick Action
Helen Smith	20/03/2013	Domain.com.au	0	2	0	Hot	<input checked="" type="checkbox"/>	1,500,000	<input checked="" type="checkbox"/>	<input type="checkbox"/>	+ Quick Action

4. You can edit feedback by clicking the arrow next to each contact, you can edit the source, interest levels etc by click +Add in the corresponding column

Contact	Last Activity	Source	#Enq	#Insp	#Offer	Interest	Contract Taken	\$Feedback	Ongoing Interest	Follow Up	+ Add Contact
Alexander Tanner	19/06/2014	Newspaper	0	1	0	Warm	<input checked="" type="checkbox"/>	875,000	<input checked="" type="checkbox"/>	<input type="checkbox"/>	+ Quick Action
Andrew Stead	08/10/2013	Newspaper	0	1	0	Hot	<input type="checkbox"/>	1,040,000	<input checked="" type="checkbox"/>	<input type="checkbox"/>	+ Quick Action
Bob Thomas	10/12/2013	Word Of Mouth	0	4	0	Hot	<input type="checkbox"/>	1,100,000	<input checked="" type="checkbox"/>	<input type="checkbox"/>	+ Quick Action
Danielle Hunt	08/10/2013	+ Add	0	1	0	+ Add	<input type="checkbox"/>	0	<input type="checkbox"/>	<input type="checkbox"/>	+ Quick Action
Gabe Knowles	05/11/2011	Database	0	1	0	Warm	<input type="checkbox"/>	1,250,000	<input type="checkbox"/>	<input type="checkbox"/>	+ Quick Action
George Smith	19/12/2013	+ Add	0	1	0	+ Add	<input type="checkbox"/>	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	+ Quick Action
Harry Crane	05/11/2011	Realestate.com.au	0	1	0	Cold	<input type="checkbox"/>	1,205,000	<input type="checkbox"/>	<input type="checkbox"/>	+ Quick Action

5. You can sort and filter viewers of the property by name, date, inspection type, price feedback, interest levels and flag for follow up or if they have ongoing interest

Contact	Last Activity	Source	#Enq	#Insp	#Offer	Interest	Contract Taken	\$Feedback	Ongoing Interest	Follow Up	+ Add Contact
Alexander Tanner	19/06/2014	Newspaper	0	1	0	Warm	<input checked="" type="checkbox"/>	875,000	<input checked="" type="checkbox"/>	<input type="checkbox"/>	+ Quick Action
Andrew Stead	08/10/2013	Newspaper	0	1	0	Hot	<input type="checkbox"/>	1,040,000	<input checked="" type="checkbox"/>	<input type="checkbox"/>	+ Quick Action
Bob Thomas	10/12/2013	Word Of Mouth	0	4	0	Hot	<input type="checkbox"/>	1,100,000	<input checked="" type="checkbox"/>	<input type="checkbox"/>	+ Quick Action

6. If you click on the contacts name the contact summary will open and you can use the action icons to open the contact, send an email, SMS, e-newsletter, log a note, meeting or task

Prospective Buyers : 1 Jones Street, Copacabana (30 Contact(s) Found)

Filter: Inspection From To Filter Contacts Reset Filter

Contact	Last Activity	Source	#Enq	#Insp	#Offer	Interest	Contract Taken	\$Feedback	Ongoing Interest	Follow Up	+ Add Contact
Alexander Tanner	19/06/2014	Newspaper	0	1	0	Warm	<input checked="" type="checkbox"/>	875,000	<input checked="" type="checkbox"/>	<input type="checkbox"/>	+ Quick Action
		Newspaper	0	1	0	Hot	<input type="checkbox"/>	1,040,000	<input checked="" type="checkbox"/>	<input type="checkbox"/>	+ Quick Action
		Word Of Mouth	0	4	0	Hot	<input type="checkbox"/>	1,100,000	<input checked="" type="checkbox"/>	<input type="checkbox"/>	+ Quick Action
		+ Add	0	1	0	+ Add	<input type="checkbox"/>	0	<input type="checkbox"/>	<input type="checkbox"/>	+ Quick Action
		Database	0	1	0	Warm	<input type="checkbox"/>	1,250,000	<input type="checkbox"/>	<input type="checkbox"/>	+ Quick Action
		+ Add	0	1	0	+ Add	<input type="checkbox"/>	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	+ Quick Action
		Realestate.com.au	0	1	0	Cold	<input type="checkbox"/>	1,205,000	<input type="checkbox"/>	<input type="checkbox"/>	+ Quick Action
		Domain.com.au	1	2	0	+ Add	<input type="checkbox"/>	0	<input type="checkbox"/>	<input type="checkbox"/>	+ Quick Action
Helen Smith	20/03/2013	Domain.com.au	0	2	0	Hot	<input checked="" type="checkbox"/>	1,500,000	<input checked="" type="checkbox"/>	<input type="checkbox"/>	+ Quick Action

7. Click the **+ Quick Action** button next to each contact to complete further actions e.g. Email Contract/Documents or View Contacts Activity (all properties in your database they have inspected or enquired about)

- Add Note - When adding notes, choose whether to include this note in Vendor / Landlord Activity Report(s) with the new 'Display to Vendor' checkbox.

Prospective Buyers : 1 Jones Street, Copacabana (49 Contact(s) Found)

Filter: Inspection From To Filter Contacts Reset Filter

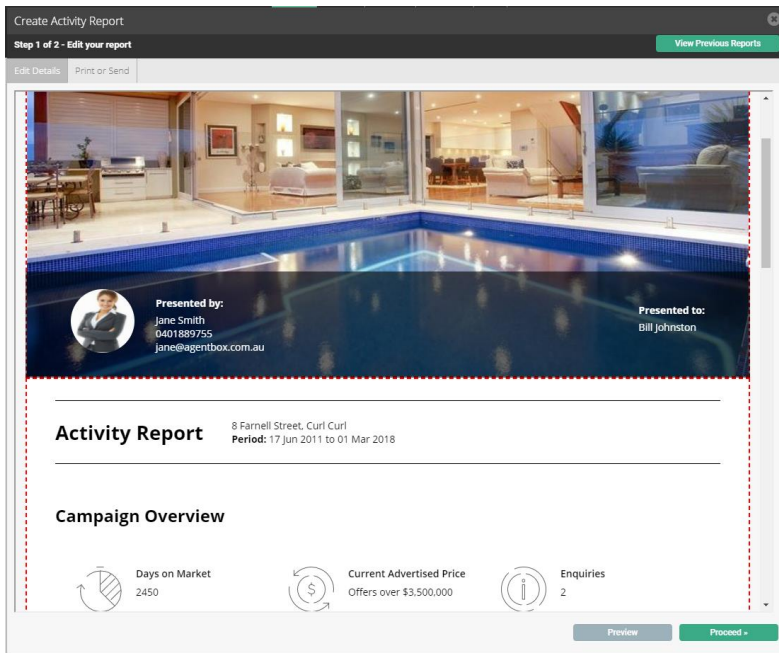
Contact	Last Activity	Source	#Enq	#Insp	#Offer	Interest	Contract Taken	\$Feedback	Ongoing Interest	Follow Up	+ Add Contact
Alexander Tanner	19/06/2014	Newspaper	0	1	0	Warm	<input checked="" type="checkbox"/>	875,000	<input checked="" type="checkbox"/>	<input type="checkbox"/>	+ Quick Action
Andrew Stead	08/10/2013	Newspaper	0	1	0	Hot	<input type="checkbox"/>	1,040,000	<input checked="" type="checkbox"/>	<input type="checkbox"/>	+ Quick Action
Ashley Ray Feltham	24/10/2018	+ Add	4	3	0	+ Add	<input type="checkbox"/>	+ Add	<input type="checkbox"/>	<input type="checkbox"/>	+ Quick Action
Bob Thomas	10/12/2013	Word Of Mouth	0	4	0	Hot	<input type="checkbox"/>	1,100,000	<input checked="" type="checkbox"/>	<input type="checkbox"/>	+ Quick Action
Brian Wayne	27/02/2015	Domain.com.au	0	1	0	Hot	<input type="checkbox"/>	+ Add	<input type="checkbox"/>	<input type="checkbox"/>	+ Quick Action
Christine James	27/02/2015	Website	0	1	0	Cold	<input type="checkbox"/>	650,000	<input type="checkbox"/>	<input type="checkbox"/>	+ Quick Action
Craig Brogan	19/05/2015	Newspaper	0	1	0	+ Add	<input checked="" type="checkbox"/>	1,100,000	<input type="checkbox"/>	<input type="checkbox"/>	+ Quick Action
Danielle Hunt	08/10/2013	+ Add	0	1	0	+ Add	<input type="checkbox"/>	+ Add	<input type="checkbox"/>	<input type="checkbox"/>	+ Quick Action
David Brown	21/04/2015	+ Add	0	1	0	+ Add	<input type="checkbox"/>	+ Add	<input type="checkbox"/>	<input type="checkbox"/>	+ Quick Action
David Avery	13/05/2015	Realestate.com.au	1	2	0	Warm	<input type="checkbox"/>	+ Add	<input type="checkbox"/>	<input type="checkbox"/>	+ Quick Action
Gabe Knowles	05/11/2011	Database	0	1	0	Warm	<input type="checkbox"/>	1,250,000	<input type="checkbox"/>	<input type="checkbox"/>	+ Quick Action
Gavin Waters	07/05/2015	Open House	0	1	0	Warm	<input type="checkbox"/>	+ Add	<input type="checkbox"/>	<input type="checkbox"/>	+ Quick Action

8. Once finished, select Activity Report at the bottom of the screen (or from the left-hand side panel).

9. Your Vendor/Landlord Report will appear on screen for editing

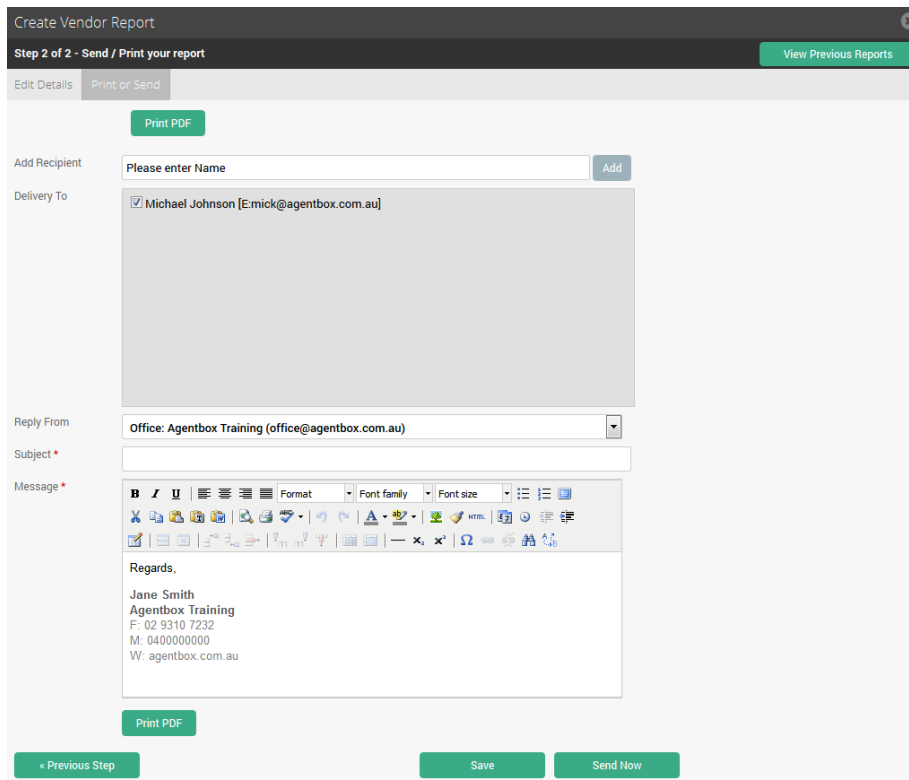
Note: The report will automatically populate data where applicable e.g. property photos, inspection feedback. If you would like to copy manually entered data from a previously created report for this listing click the **View*

Previous Reports icon in the top right-hand corner and select *Clone Activity Report* (this is for previous reports sent via email only). Your vendor report may have a different layout.



10. Once complete, select **Preview** to preview the template or **Proceed** to Print, Save and / or Send via Email.

**Note: If you choose to Print PDF without saving, a copy will not be stored against the listing. Please also select to save.*

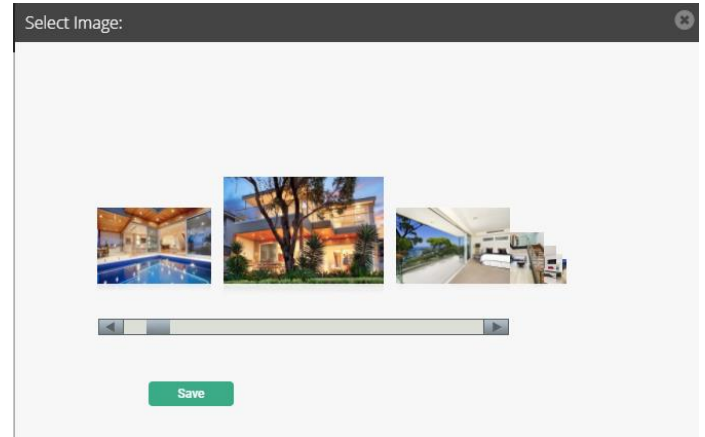


Note: be sure to select **Save, to store a copy against the property which can be viewed under the **View Previous Reports** button at the top right-hand corner of the panel.*

Edit Sections

Property Photo

Click the **Property Photo** to select a different image, click **Save** to insert.



Campaign Overview

- To Add/Edit/Delete the statistics icons click inside the red dotted lines to open the section editor. Add text to create an icon, edit text or delete text to delete icon click **Save**.

**Note: The fields here will automatically populate based on information you have added against your listing e.g. Open homes, enquiries etc.*

- Open Homes
- Viewed by Appointment
- Enquiries
- Days on Market
- Advertised Price
- Internet Statistics (Max 4 lines, a separate section to expand on marketing can be added to page 2 of the report)
- Marketing Snapshot
- Contracts Issued
- Offers

Create Activity Report

Step 1 of 2 - Edit your report

View Previous Reports

Edit Details Print or Send

Edit this Section: Activity Report

Overview

Title: Activity Report

Intro title: Campaign Overview

Intro comments:

Statistics title: Campaign Overview

Open Homes: opens: 10 | viewings: 1

Viewed by Appointment: 7

Enquiries: 2

Days on Market: 2450

Advertised Price: Offers over \$3,500,000

Internet Statistics:

Report Title, Address and Period

- To change the report Title from default (Activity Report) click inside the red dotted lines to open the section editor. Edit the **Title** field and click **Save**.
- The property address will be populated from the listing card.
- To change the Period click inside the red dotted lines of the Activity Report to open the section editor. Scroll down to the Details Display section and edit the **Period From, Period To** date fields.

Price Feedback, Interest Levels, Enquiry Source Charts

These charts will only populate if price feedback, interest levels, and enquiry source data has been logged when adding your enquiries and inspections to a listing.

- To edit this data return to the listing, click on Prospective Buyers on the left panel, click Contacts/Follow Up and add/edit/delete as required.
- If no data is present e.g. no enquiry sources added then the chart will not appear.
- If you would like to hide a chart, click inside the red dotted lines of the Activity Report to open the section editor. Scroll down to the Details Display section and from the Include checkboxes deselect from Enquiry Source Chart, Total Interest Levels Chart, and Price Feedback chart and click **Save**.
- To remove 'Unknown' data where some contacts have not provided feedback, click inside the red dotted lines of the Activity Report to open the section editor. Scroll down to the Details Display section and from the **Include** checkboxes deselect **N/A in price feedback & interest levels charts** and click **Save**.



Understanding the Price Feedback chart.

The price feedback chart consolidates all price feedback received during the campaign, comparing against the listing's search price to sort feedback into three categories: Below, Within and Above a specified percentage of the Search Price. The percentage used can be configured as a default (3%, 5%, 7% or 10%) and also overridden per-report.

To configure this percentage click inside the red dotted lines of the Activity Report to open the section editor. Scroll down to the Details Display section and select the desired range from the **Price Feedback %** field and click **Save**.

Example: For a listing with a **Search Price of \$500,000** and where the Price Feedback calculation is **set to 5%** it will display the 3 options below.

- × The price feedback chart will display "Below \$475,000"
- × The price feedback chart will display "Between \$475,000 and \$525,000"
- × The price feedback chart will display "Above \$525,000"

The number of contacts who have provided feedback in each price range is now also totalled and displayed on the donut chart in addition to the percentage.

Enquiries

In this section, we can see all enquiries logged against the listing.

- If no enquiries have been logged the section will not appear. This can be edited in the **Viewers** section of **Inspection Feedback**
- If you would like to hide the section, click inside the red dotted lines of the Activity Report section above to open the content editor. Scroll down to the Details Display section and from the Include, checkboxes deselect **Enquiries section** and click **Save**.
- If you would like to Edit an existing comment, click from the table to open, edit the comment and click **Save**. Please Note, any changes made will overwrite the original comment not just for this vendor report.
- If you would like to hide the enquiry/feedback it will not permanently delete this data it will only hide from this report. Click to edit a comment and select Display Enquiry - **No** and click **Save**.

The screenshot shows a web interface for creating an activity report. At the top, it says 'Create Activity Report' and 'Step 1 of 2 - Edit your report'. There are buttons for 'View Previous Reports', 'Cancel', and 'Print or Send'. The main content area is divided into sections. The 'Enquiries' section has a 'Total: 2' and a table with columns 'Name' and 'Date'. The table lists two enquiries: Anne (25/09) and Andrew (25/09). An 'Edit Enquiry' modal dialog is open over the table. The modal has a title 'Edit Enquiry' and a 'Display Enquiry' section with radio buttons for 'Yes' and 'No'. Below this is a text area containing the enquiry comment: 'Would like to organise another inspection, partner was unable to attend.' At the bottom of the modal is a green 'Save' button. A yellow warning box is visible at the bottom of the modal, stating: 'Warning: any changes made will overwrite the original comment not just for this vendor report'. Below the 'Enquiries' section is the 'Inspection Feedback' section, which has a table with columns 'Name', 'Date', 'Comments', and 'Contract'. The table lists four feedback entries: Tony (12/12/2017), Asd (12/12/2017), Emma (12/12/2017), and Joe (12/12/2017). The 'Comments' column for Joe contains the text 'Warm Overpriced love it'.

Inspection Viewers

In this section, we can see all inspection feedback from open homes and private viewings logged against the listing.

- If no inspection feedback has been logged the section will not appear.
- If you would like to hide the section, click inside the red dotted lines of the Activity Report section above to open the content editor. Scroll down to the Details Display section and from the Include checkboxes deselect **Viewers section** and click **Save**.
- If you would like to Edit an existing comment, click from the table to open, edit the comment and click **Save**. Please Note, any changes made will overwrite the original comment not just for this vendor report.
- If you would like to hide the feedback it will not permanently delete this data it will only hide from this report. Click to edit a comment and select Display Enquiry - **No** and click **Save**.
- Price feedback, interest levels, contract taken data can be edited in the **Viewers** section of **Inspection Feedback** for the listing.

Ongoing Interest

In this section, we can see all enquiries and viewers who have been flagged with the tag Ongoing Interest. This can be edited in the **Viewers** section of **Inspection Feedback** for the listing.

- If no ongoing interest has been flagged the section will not appear.
- If you would like to hide the section, click inside the red dotted lines of the Activity Report section above to open the content editor. Scroll down to the Details Display section and from the Include checkboxes deselect **Ongoing Interest section** and click **Save**.

Offers

In this section, we can see all offers logged against a listing. These can be logged in the **Offers and Contracts tab** or in the **Viewers** section of **Inspection Feedback** for the listing.

- If no offer has been logged the section will not appear.
- If you would like to hide the section, click inside the red dotted lines of the Activity Report section above to open the content editor. Scroll down to the Details Display section and from the Include checkboxes deselect **Offers section** and click **Save**.

Activity Timeline

This section provides an overview of all listing activity in chronological order.

**Note: For optimum results, when using the Activity Timeline we recommend hiding the individual enquiry, inspection and offer sections as this section combines all that data into an easy to read timeline.*

Individual Note & Phone Call records logged against Prospective Buyers will appear alongside other activities such as enquiries, inspections & offers.

- Configuration options provide flexibility to display or hide the new Activity Timeline section and when enabled, additional options allow you to manage how activity is displayed:
 - **Total Campaign [All Activity]** - Displays all activity against all contacts, regardless of the period.
 - **Total Campaign [Ongoing Interest Only]** - Displays all activity against all contacts marked as having 'Ongoing Interest'.
 - **Period Only [All Activity]** - Displays all activity against all contacts, where at least one activity was within the report period.
 - **Period Only [Activity within Period Only]** - Displays only activity that was within the report period.
 - Click **Save** to insert and view your activity timeline.
- If you would like to hide the section, click inside the red dotted lines of the Activity Report section above to open the content editor. Scroll down to the Activity Timeline section and select **none** in the dropdown and click **Save**.

Activity Timeline

The screenshot displays the Activity Timeline interface. At the top, there is a dark header bar with 'Enquiries: 1' and 'Inspections: 1'. Below this, there are two activity entries:

- Enquiry:** Mon 3 Dec. The text reads: 'Would like to find out next inspection time'.
- Inspection:** Sat 1 Dec.

Below the activities, the user's name 'Kevin Johnston' is shown with a 'WARM' status indicator. A second dark header bar shows 'Inspections: 1' and 'Price Feedback: \$1,950,000'. Below this, there is another activity entry:

- Inspection:** Sat 1 Dec.

Tasks Completed

In this section, we can see all completed tasks logged against a listing.

- If no tasks have been added and completed the section will not appear.
- If you would like to hide the section, click inside the red dotted lines of the Activity Report section above to open the content editor. Scroll down to the Details Display section and from the Include checkboxes deselect **Tasks Completed section** and click **Save**.