AN INTRODUCTION TO

EA-Pro

BRINGING REAL ESTATE TOGETHER

Welcome to EA-Pro

INDEX

1.0 LOGGING IN

When you first launch EA-Pro the following screen will appear:

To access the system, the user should select their name from the *USER* drop down list and enter their password in the *PASSWORD* box. By default the user is *SUPERVISOR* and the password is to be left blank. Then hit the *LOGIN* button to proceed, which will bring up the following screen:
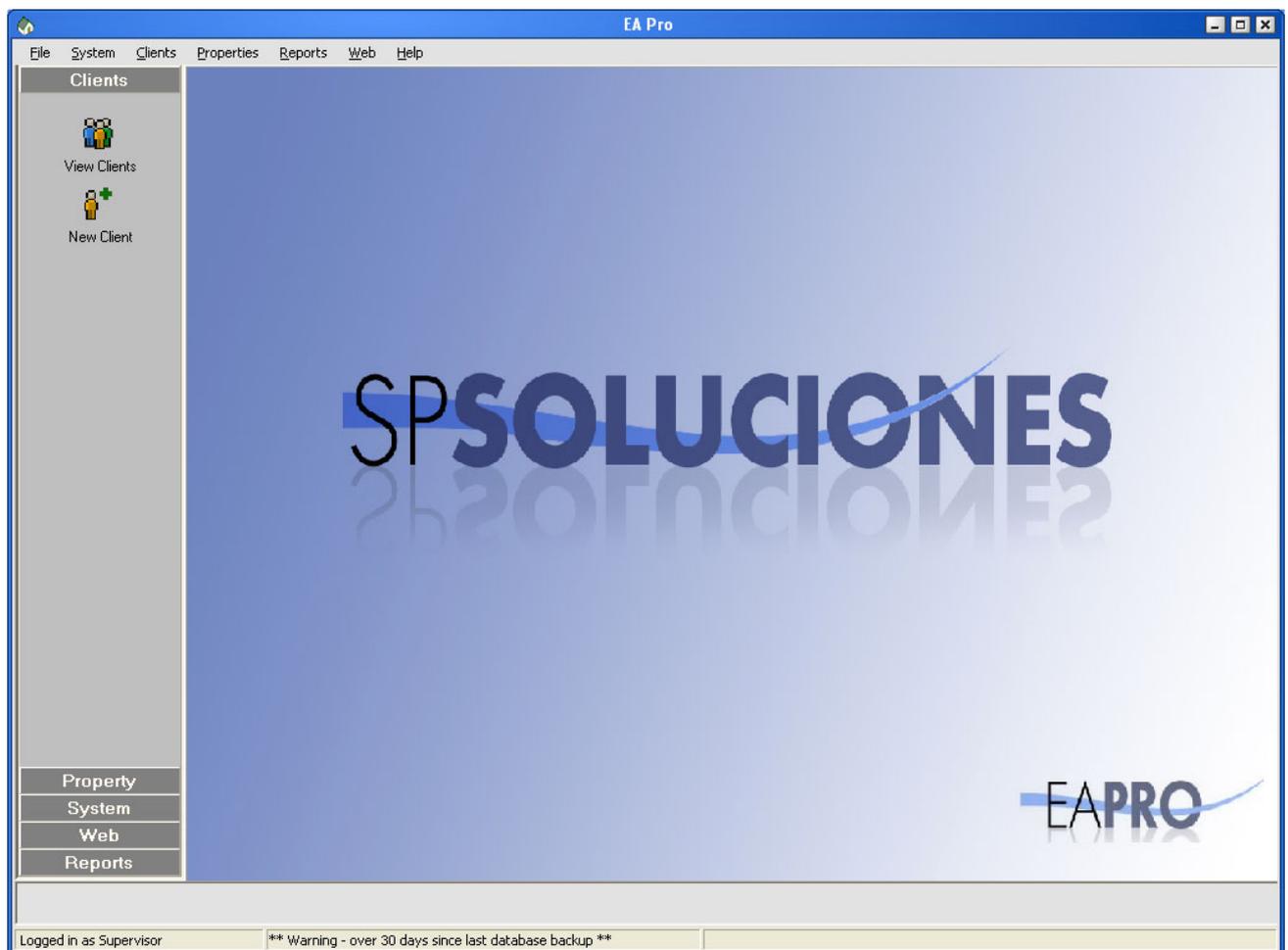
2.0 MENU OPTIONS

The various system areas are listed across the top of the screen and down the left hand side. The system areas are broken down as follows:

2.1 SYSTEM | SYSTEM SET-UP

2.1.1 Users

System set-up, either double click or use the *EDIT* button when wanting to change anything on this screen:
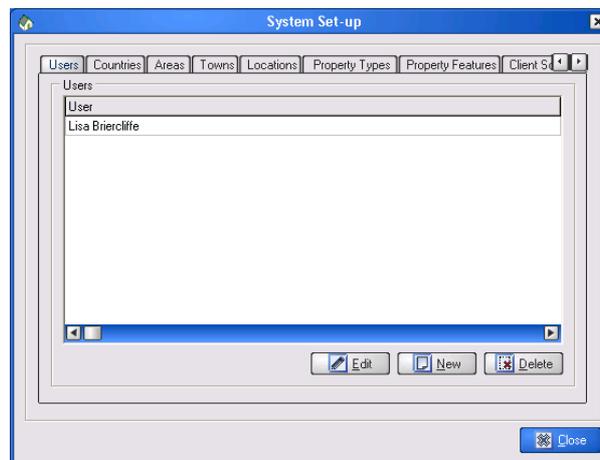
To add users click on the *NEW* button in the *USERS* tab and set a login name & password, you also set the user options from this screen, which will define the functions you want each individual user to be able to access or update. When you have finished updating click on the *SAVE* button and this will save the details for use whenever the user logs in, then *CLOSE*.
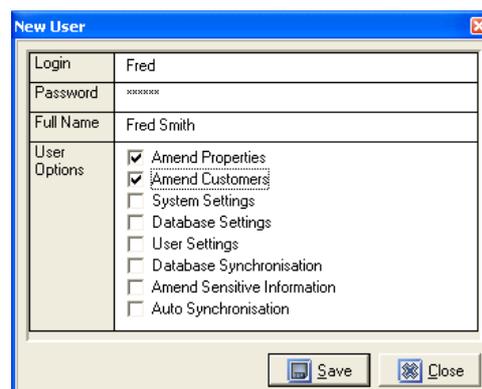
2.1.2 Countries / Areas / Towns / Locations / Property Types / Property Features

This information is held in the central EA-Pro database and cannot be updated locally by an individual. If you require an area / town / Location, etc. that isn't already listed then please email SP Soluciones at admin@spanish-property-selection.com and the system will be updated for you.

2.1.3 Client Sources

Sources from where you obtain clients are personal to each agency, and this section allows you to enter those details (such as "Local Paper" "Kyero" or another Agency).

2.2 SYSTEM | GENERAL SETTINGS

This is where your agent details are entered and is of paramount importance if you wish your properties to be advertised professionally. Agent name, address, email and website details entered here are shown on properties advertised on the Internet, and on printed property cards.

When properties are added to the EA-Pro system, they are automatically assigned a property number, starting at 000001. A property prefix can be specified within this screen to prefix your properties when listed. This prefix can be from 1 to 3 characters long. (See *PROP PREFIX* below). Having a property prefix can make it easier to identify which agent a particular property is with when you are looking at the property list.

WEB LOGO is shown against your properties listed on the Spanish Property Selection website.

CARD LOGO is shown on the property cards.

DEFAULT COUNTRY is initially set to Spain – this specifies the default country selected when adding a new property. The EA-Pro system is designed to work worldwide and so the default country could be set to any country listed.

OTHER COUNTRY, if specified, show's another countries currency on the property cards, i.e. United Kingdom. If you only want the property's main country currency shown, then leave this option as *NONE.*

SET CURRENCY RATES provides the ability to manually set currency rates for the default country and second country. The figures entered are in relation to the Euro, so GBP would be something like 0.65, indicating that 1 Euro is approx £0.65. If the manual option is not checked, the *AUTO SYNCH* option (see 2.4) automatically updates all country rates on a daily basis from the Central European Bank.

2.3 SYSTEM | LOCAL SETTINGS

Select which email system you use, either "Outlook Express / Outlook", or if you are using Outlook running with MS Exchange Server then select this option. An email Signature is required to be entered into EA-Pro for the MS Exchange Server option, as emails are generated in a slightly different manner to the normal "Outlook Express / Outlook" method.

Property List – *NORMAL LIST REFRESH* will usually be used unless you are working with a wireless LAN in which case select *REFRESH ON SCROLL* as wireless LANs can be slow and this setting will make the property list function much faster.
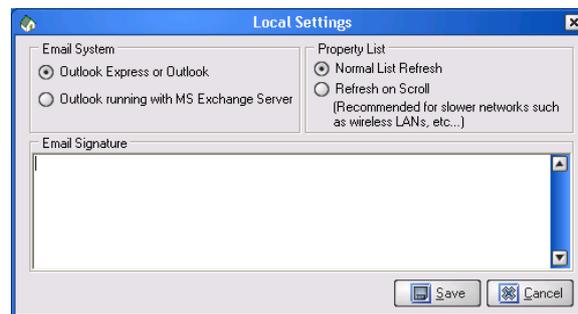
2.4 SYSTEM | AUTO SYNCHRONIZE

On this screen you can specify if, and how often you want the system to automatically download and update your local system with:

    A) Latest currency rate downloads
    B) SPS data downloads (latest areas, towns, etc.)
    C) Collaborative agent properties.

By putting an X in the box means you want this action to be active. Then use the drop down boxes to set the time scale.
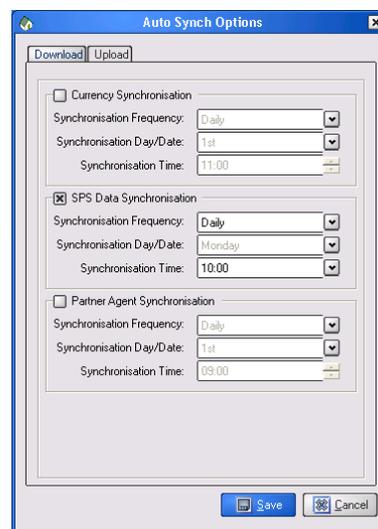
Conversely, you can specify how often you wish to upload your information:
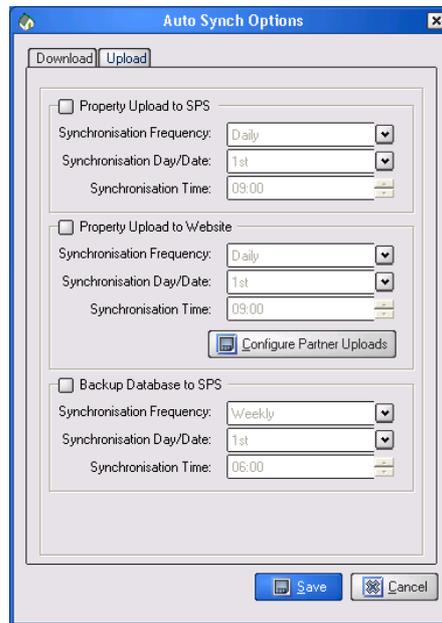
Here, you are able to specify upload settings for:

- A) Uploading your latest property information to the central database.
- B) Uploading your (and collaborative agents) latest property information to your own website.
- C) Backing up your local database to the SPS Support Area.

2.5 SYSTEM | DATABASE BACKUP

Browse your machine and choose a directory where you would like your system to be backed up to. By clicking the "Backup" button, your entire EA-Pro database will be backed up to the chosen directory.
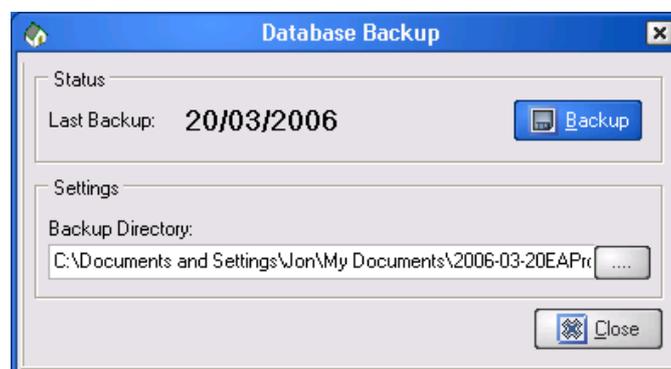
2.6 CLIENTS | VIEW CLIENTS

This shows a list of clients in your EA-Pro system, and at the top of the page are client search facilities. You can search by individual client information, e.g. surname, and this will bring up a list of clients with the matching same surname - once the details are input click *APPLY* and filter the client list accordingly. You can filter on as many different client details as you like. For example, type surname of "Cr" and telephone number '01708' – this will show all clients with the letters "Cr" in the surname, and "01708" in their telephone number. To reset the client list to all clients, there is a *CLEAR* button, which will reset the search criteria.

You can also add a new client from this page by clicking the *NEW* button.
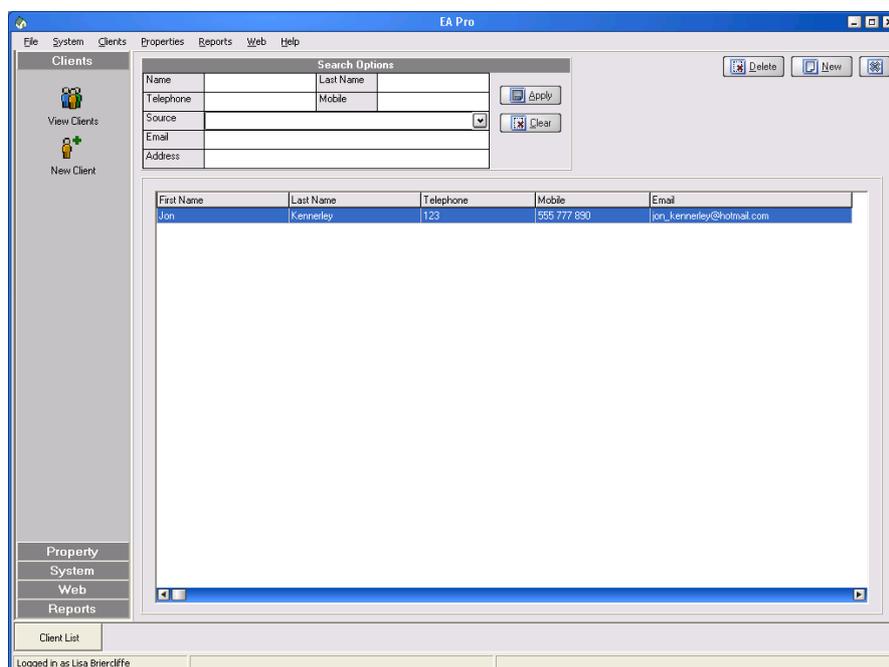
2.7 CLIENTS | NEW CLIENT

Input general client details and their preferences in the *DETAILS* page. Tick all of the options that the client requires within the "Client Preferences" area, and this will narrow down the properties that EA Pro will suggest as suitable for that client. Adding the min / max prices and min number of bedrooms values will narrow down the search still further.
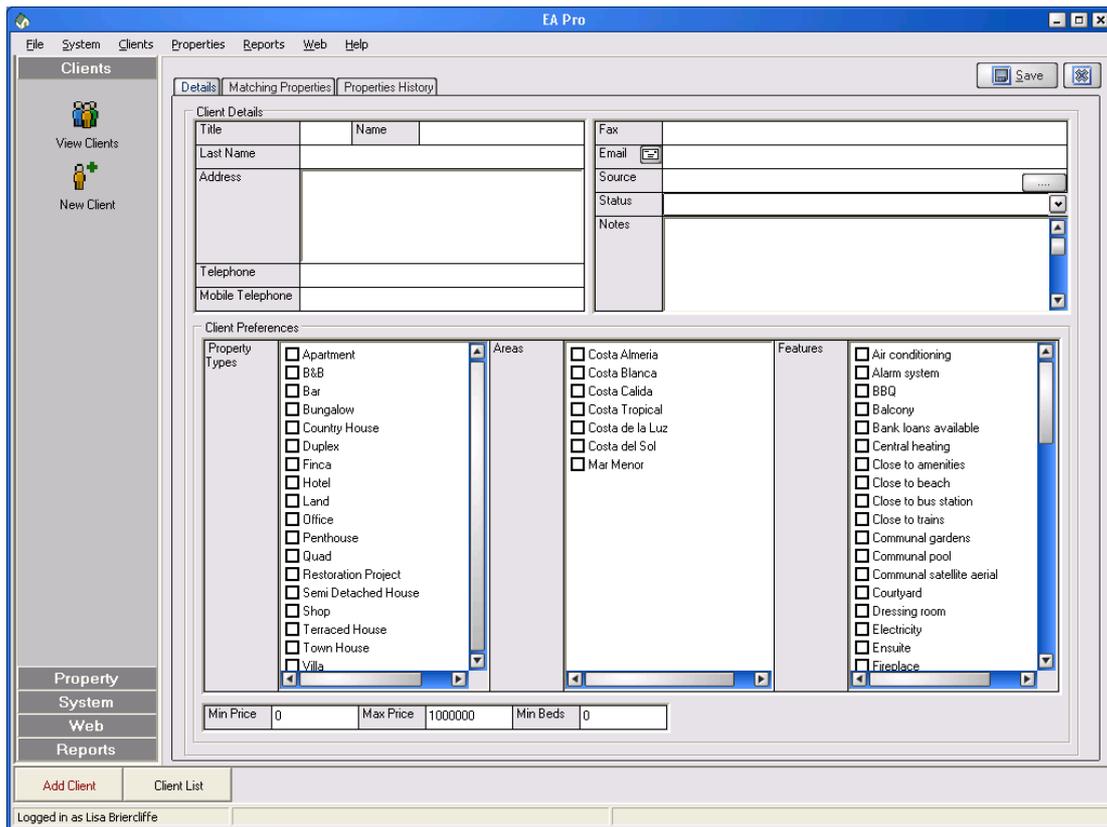
The *MATCHING PROPERTY* tab will give you a list of the properties that are suitable for the client's preferences.

The property list order can be sorted A-Z or Z-A by double clicking on the relevant column header, *PRICE* for example.

Pictures of the properties are shown as you scroll over them, a bigger picture is shown when the mouse is over the picture. Double clicking on a property in the property list will launch a detailed screen of the property details.

Client Wish List

Click a property that you want a client to see in the top list, and drag to the wish list area at the bottom of the page. Alternatively, you can use the *ADD TO WISH LIST* button, this will form a list of suitable properties that can then be emailed to the client or printed off. Once you have selected all of the properties that you wish to be sent to your client, you have the options to FILE / PRINT / EMAIL.

FILE – Saves the details to disk as an Adobe pdf file.
PRINT – Prints off details in your office via the Adobe interface (allows printer selection, re-sizing, etc…)
EMAIL – Creates an Adobe pdf file and attaches it to a new email ready to be sent to your client – the clients email address is already filled in for you if you have an email address for the client within EA-Pro.

There are several property card types available for sending/printing property details, these are listed in a drop down selection box. The list consists of detailed templates (where each page displays a whole property's details) and list templates (where multiple property details are listed on a single page).
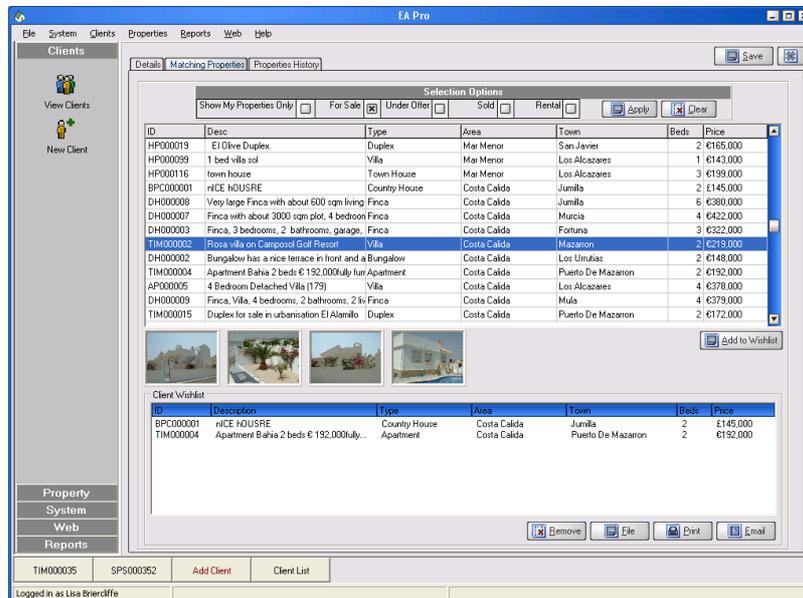
Properties History

The property history for a client provides a list of properties previously given to a client. The list can be re-ordered by clicking the top columns of the list in the same manner as re-ordering the property list.

Details of the current selected history item can be viewed at the bottom of the screen. Notes can be entered against an item by clicking the "Edit" button - this provides the ability to track a client's feedback against properties.
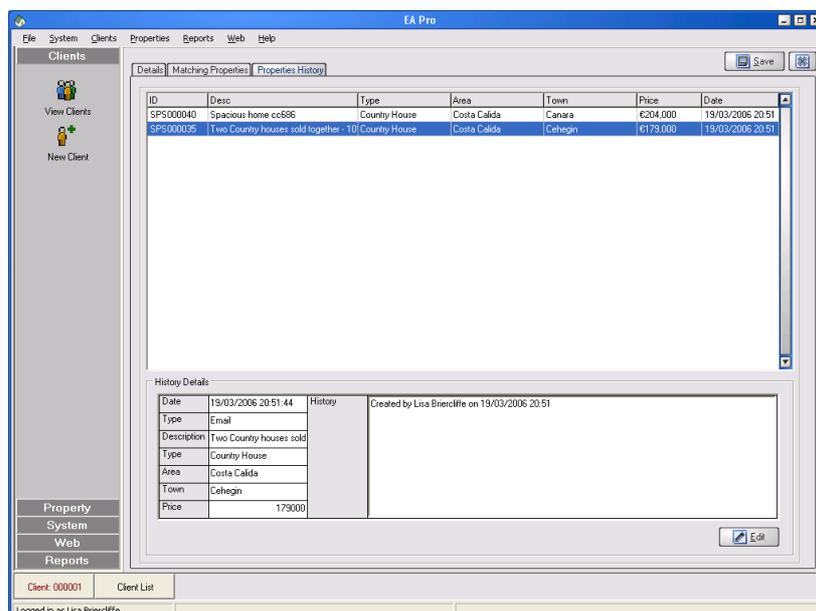
2.8 PROPERTY | VIEW PROPERTIES

Search Options

You can search EA-Pro properties by price, Town, Area, Min beds and Type, etc. Click the *APPLY* button to filter the property list accordingly. The *CLEAR* button clears previous filter options and shows all agent properties. Additionally, only properties that are For Sale, Under Offer, Sold or Rental can be shown in the list. Click on the top bar of a column in the property list to order by A-Z or Z-A.

Partner Options

If you are partnered with other collaborative agents through the EA-Pro system then a further filter section called "Partner Options" is shown.

This allows you to display only your own properties in the property list, or list properties for any other collaborative agent. The *CLEAR* button clears previous filter options and shows all agent properties.

It should be noted that Search Options and Partner Options work independently of each other, for example – clearing the filter in the Partner Options will not clear the Search Options criteria currently selected.

You can also create *NEW* properties from this screen and *DELETE* any property in the list. Deleting a property does not archive it, it is a permanent deletion from the system. Therefore care should be taken before deleting a property. It is advisable to keep a property on the system until the sale is completely finalised – changing the status of the property (i.e. To Under Offer or Sold) can allow you to remove these properties from your property list should you so wish (see the search options section above).

Collaborative agent properties can be deleted from your local system too, should there be another agents' property that you do not wish to be included in your local system. If another agent's property is deleted, it is again a permanent deletion and the property will not re-appear in your property list when you next synchronise your system with the central EA-Pro database.
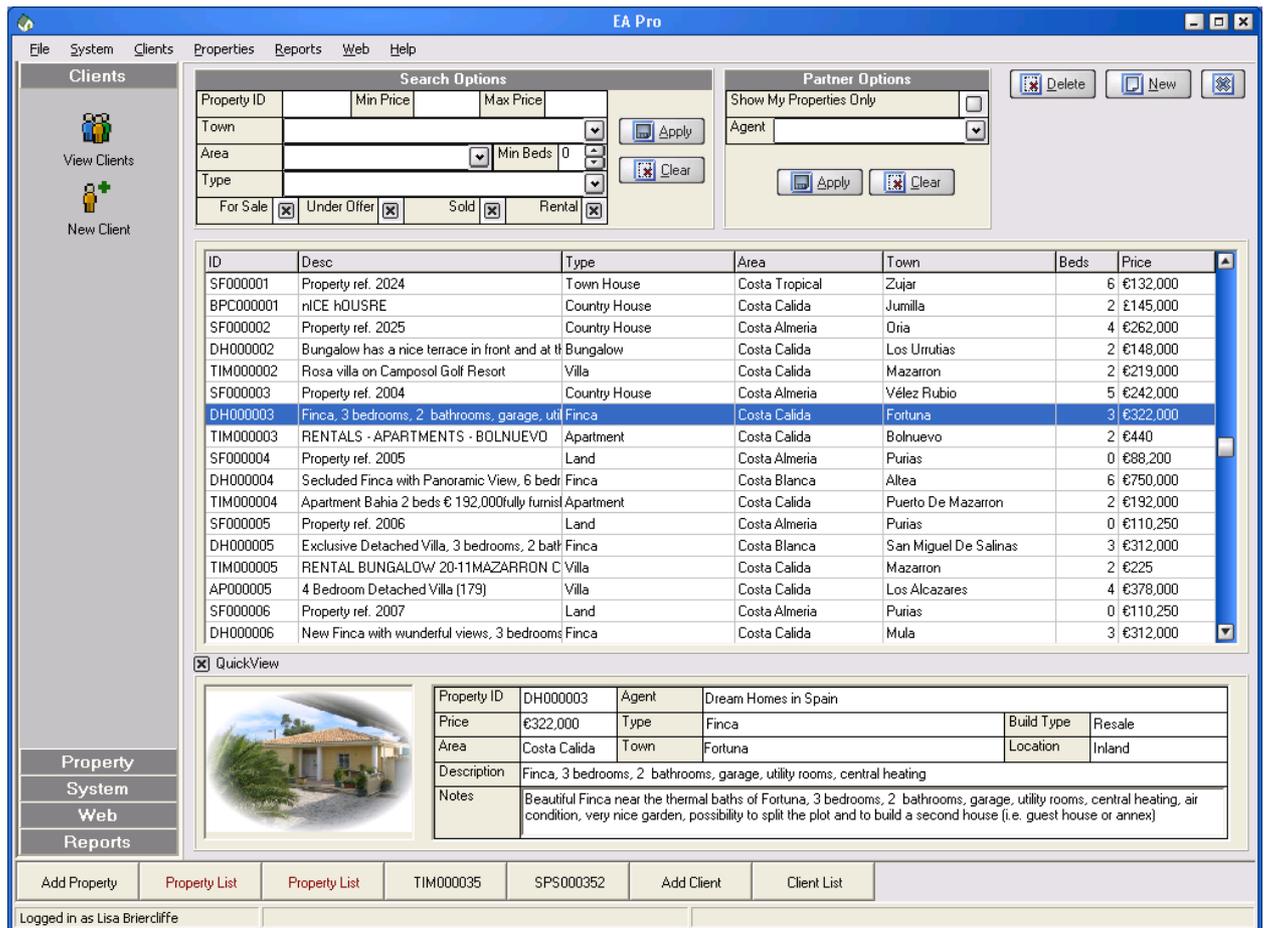
2.9 PROPERTIES | NEW PROPERTY

Details

This is where general property details are entered, most of which is self-explanatory, but anything that needs expanding upon has a quick definition below:

NO BEDS allows you to specify either a definite number of bedrooms or a range, from say 2-6 beds. This is useful when selling properties on a new development. For a definite number, check NO. BEDS and for a range, check BEDS FROM.

CURRENCY - This defaults to the currency of the country where the property is based, but can be changed to any currency that you require. This feature would be used if, for example, you are selling Spanish property but are based in the UK, and therefore want the primary price of the property to be in Sterling. Note that the currency printed on the property card and shown on the website will be the currency set for that individual property.

UPLOAD – Specifies whether the property will be shown on:
> Your website (if configured within EA-Pro)
> Spanish Property Selection portal

SHARE relates to your properties uploaded to Spanish Property Selection. If you want to SHARE the property details with other agents (i.e. They can download your properties to their local EA-Pro system) then this option should be checked. If not checked, your properties will still be uploaded to the portal (if the upload option is checked).

NOTES – Input any details relevant to the property description that aren't covered by the property features list.

SHOW EXTRA INFO – This area is secured, based on your user rights. Here you can store sensitive details about the property – vendor, commission rate, etc… These details are shown/hidden with the button in case the property details are being shown to a client in your office.

For you own properties, this section has specific areas for entering commission rates, owner details, etc, but for other agent properties there is just a general notes area for you to make your own notes on the property. This is because such sensitive information such as owner details and commission rates are kept solely to your local EA-Pro system.

Extra Info

On this tab, you can enter the actual property address, if desired. This option is only available for your own properties, and is only viewable for your own properties. Thus, such sensitive information is not available for other agent's properties in your system. A list of property rooms can also be entered, along with room dimensions, the floor that the room is on, plus a brief description.

Images

You can have a maximum of 8 images per property.

Click on the *BROWSE* button to locate a property image on your hard drive. Pictures are loaded directly into the EA-Pro system, so it does not matter if the source image file on the hard drive is deleted at a latter point. Images can be rotated using the circular button in the top right of each image, and a description can be added just below the picture. Additionally, the brightness and contrast of each image can be adjusted using the *EDIT* button.

An Image can be swapped with another image by dragging and dropping the image into another image box, thus allowing you to change the order in which they are viewed. This is important as the main photo plus 2nd, 3rd are the main images used in the production of the majority of property cards and also on the website property search facilities.

When all the pictures are as you want them click on the *SAVE* button. The property "Details" tab will be shown and EA-Pro will perform a spell check on the property details entered before committing the property to the system.

Please note that the facility to spell check relies on Microsoft word being installed on your machine.


2.10 REPORTS

Client reports

The "Select Report" dialogue has a list of the reports available to you. Select the report that you require and press the *RUN* button to initiate the report. EA-Pro will then collate all the information required in an instant, enabling you to have up to the minute information at your fingertips.

The *CLIENT LIST* is a list of all clients held on your system.

The *CLIENTS BY SOURCE* lists clients, grouped by source. (Sources are entered in the System Setup section – see 2.1.3)

The *CLIENTS SOURCE CHART* is a pie chart showing the breakdown of clients by source.

The *CLIENT PROPERTY HISTORY SUMMARY / DETAIL* reports provide detailed histories of property details given to a client.
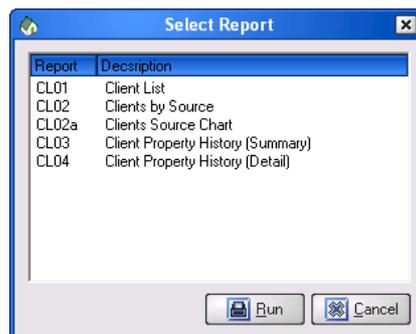
2.11 WEB | DATABASE SYNCHRONISATION

The Database Synchronisation section consists of 2 areas: Website Upload and SPS Download.

2.11.1 Website Upload

From this screen you ensure that the central EA-Pro database is up to date with all of your latest property details. EA-Pro will tell you if there are any new, amended or deleted properties that you need to update the central database with.

Additionally, if you have a personal company website configured within EA-Pro (upload your properties to your own website) then EA-Pro will also tell you how many new, amended or deleted properties you need to update you own website with.

Selecting "Upload to Website", "Upload to SPS", or both, indicates which uploads you wish to perform. Clicking the *START* button will initiate the uploads and you will see the progress of the uploads shown in the "Progress" area.

2.11.2 SPS Download

From this screen, you have the ability to update your local system with the latest information from the central EA-Pro database. There are 2 downloads available:

SPS Data

If this option is checked, the latest system information is downloaded to your local EA-Pro database. This information consists of country, area, town, property types, etc….

Partner Properties

If this option is checked, the latest collaborative agent property information is downloaded to your local EA-Pro database.

Clicking the *START* button will initiate the selected downloads and the progress can be seen in the "Progress" area.
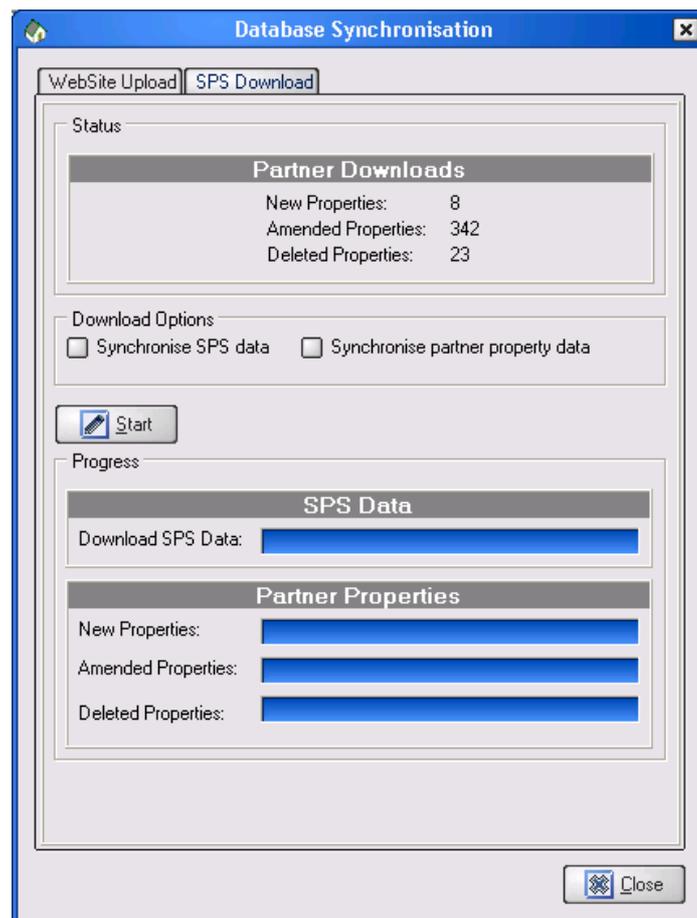

It should be noted that all of these options can be configured to automatically run on a periodic basis using the Auto Synchronisation options (see section 2.4).

2.12 WEB | SYSTEM AGENTS

This lists all EA-Pro agents along with their email addresses and contact telephone numbers. If you are partnered with any of the agents in the list then a ▓ symbol is shown next to that agent and the agent is ticked in the list.

If you wish to share with new agents then simply tick them in the list. If you wish to remove sharing with a current agent, un-tick that agent in the list. Clicking the *REQUEST SHARING* button will create a formatted email ready to send through to the SP Soluciones admin team.
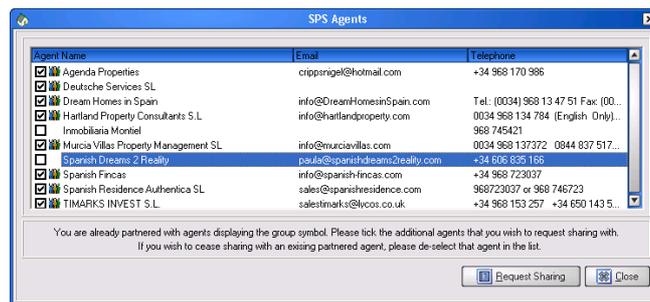
2.13 WEB | WEBSITE
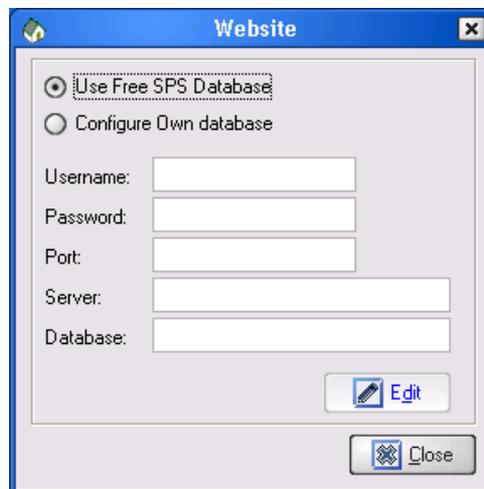
This screen allows you to configure the upload or your properties directly from EA-Pro to your personal website. Your website needs to have MySQL installed in order for this feature to work. Simply enter your MySQL login details on this screen and EA-Pro will do the rest!

In order to make this fantastic feature more accessible to our agents, you have the option to use the "Free SPS Database" option. This enables full database upload and search facilities from your own website without the need for your own MySQL database. For more information, please email sales@spsoluciones.com

3.0 EA-PRO PROPERTY SHARING

3.1 DATA TRANSMISSION

We understand that protecting your data is of the utmost importance and so the only information ever uploaded to the EA-Pro central database is your general property information – images, price details, description, etc… Sensitive information such as owner details, property address, commissions, etc. are kept solely within your local EA-Pro database.

In order to secure your local database, however, EA-Pro provides the ability to back up your entire database to our support area, where it is secure and no other agents can get access to it. This means that you are safe in the knowledge that, should some local disaster occur in your office and you have no local backup copies, you can contact us and we can re-instate your system to it's former state.

3.2 SHARING ENVIRONMENT

A huge benefit of the EA-Pro system is the ability to share your properties with collaborative agents. However, there are a number of set-up options that you as an agent can choose, and sharing may not be one of them.

The agent configuration options available are:

Show / Don't Show properties on the SPS Portal.
Share / Don't Share properties with collaborative agents.
Don't upload some/all of your properties to the central database.
Don't upload some/all of your properties to your website.
Disable sharing of individual properties within the central EA-Pro database.

All of these mix/match options make EA-Pro a very beneficial and effective system for anyone to use!