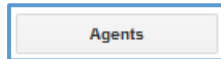


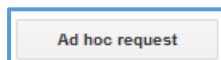
# Adding Additional Ad hoc Items to the Portal



1. Log into the Portal and click on **Agents**.
2. Select the relevant Estate Agent name from the list, e.g. *Abacus Letting Services*.
3. In the field for “Commercial Fee, Removed”, change the fee to the relevant amount, e.g. *£4.25*

Commercial Fees	
Sign Placed	£12.50
Unsuccessful	£12.50
Changed	£12.50
Re-erected	£12.50
Removed	£4.25

4. Click Save



5. Click on **Ad hoc Request** and complete the Agent and Branch fields.
6. Select the **Sign Category** to be “Commercial”.
7. Select the **Sign Action** to be “Remove”.

Agent	
Agent	Test Agent - Please Ignor ...
Branch	Test @PleaseIgnore ...
Request Type	
Sign Category	Commercial
Sign Action	Remove

8. Next go to the **Postcode** field and enter the Postcode of the Estate Agent Branch. The postcode can be found on the Client spreadsheet, or on an invoice for that agent.
9. Now click on the red **Location** field button, and select the **Not Found** option from the pop-up.

Location	
Postcode	BN14 9PF
No data available in table	

## Adding Additional Ad hoc Items to the Portal

- Complete the remaining mandatory fields, ensure that "S-board" is chosen, otherwise the agent will be charged twice. Enter the additional item in the **Address Line 1** field, e.g. *Posts x4*

**Agent**  
Agent   
Branch

**Request Type**  
Sign Category   
Sign Action   
Location   

Board Type and Sign to Display are required for removal requests of signs not already in our database. This is to ensure the correct sign is removed.

Board Type   
Sign to Display   
Quantity

**Address**  
Line 1   
Line 2   
Line 3   
Town   
Postcode

















**Further Information**  
Notes 

SUBMIT

- Click **Submit**.

List view

- Go to **List View** and sort by the "Requested" Column to locate the most recent request if it is not already showing at the top.

Branch	Sign	Address	Status	Controls	Requested	Completed
Test @Pleaselnore * (Stone Signs Admin)	Commercial Remove S-Board Coming Soon	Test for Posts x4 BN14 9PF	Pending	   	04/11/2020 15:17	
Test @Pleaselnore * (Stone Signs Admin)	Commercial Remove S-Board Coming Soon	Test for Posts x4 BN14 9PF	Pending	   	04/11/2020 15:17	
Test @Pleaselnore * (Stone Signs Admin)	Commercial Remove S-Board Coming Soon	Test for Posts x4 BN14 9PF	Pending	   	04/11/2020 15:17	
Test @Pleaselnore * (Stone Signs Admin)	Commercial Remove S-Board Coming Soon	Test for Posts x4 BN14 9PF	Pending	   	04/11/2020 15:17	

## Adding Additional Ad hoc Items to the Portal

13. Mark the item as completed using the blue tick, and ensure the total number of additional items are shown as completed, e.g. 4

Confirmation


☒
☐

Do you wish to mark one or more of these requests as completed?

Apply to  Request(s).

### Invoicing

14. Click on **Invoicing** and sort by “Completed” Column to check the Net Charge matches the spreadsheet total.

Branch	Sign	Address	Requested	Status	Completed	Net Charge	Controls
Test @PleaseIgnore	Commercial Remove S-Board x 4	Test for Posts x4 BN14 9PF	04/11/2020 15:17	Completed	04/11/2020 15:18	£4.00	

### Agents

15. If required, under the **Agents** section, change the “Commercial Fee, Removed” back to £12.50.

### FINALLY

16. Ensure Rachel has a copy of the Additional Items spreadsheet so she knows on which Agents to adjust the description of “Commercial, Remove, S-Board” to “Posts” (or other item).