alto

Quick Start Guide

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Log In and Home Screen

Open up your web browser and go to:

https://login.vebraalto.com

Enter your Username and Password then click the **Login** button – if you have forgotten your password, click on the **Forgotten your password?** link. If you have forgotten your user name, please speak to your Group Administrator.

When you log in to Alto you will be presented with the Home Screen.

There are eight charts which can be configured to show various reports including current stock and outstanding offers. As your database grows, the Home Screen will begin to be populated with appointments, sales in progress and to-do items. To configure each widget, click on the icon on the relevant chart.

To return to the Home Screen at any time, click on the icon in the top-left corner.

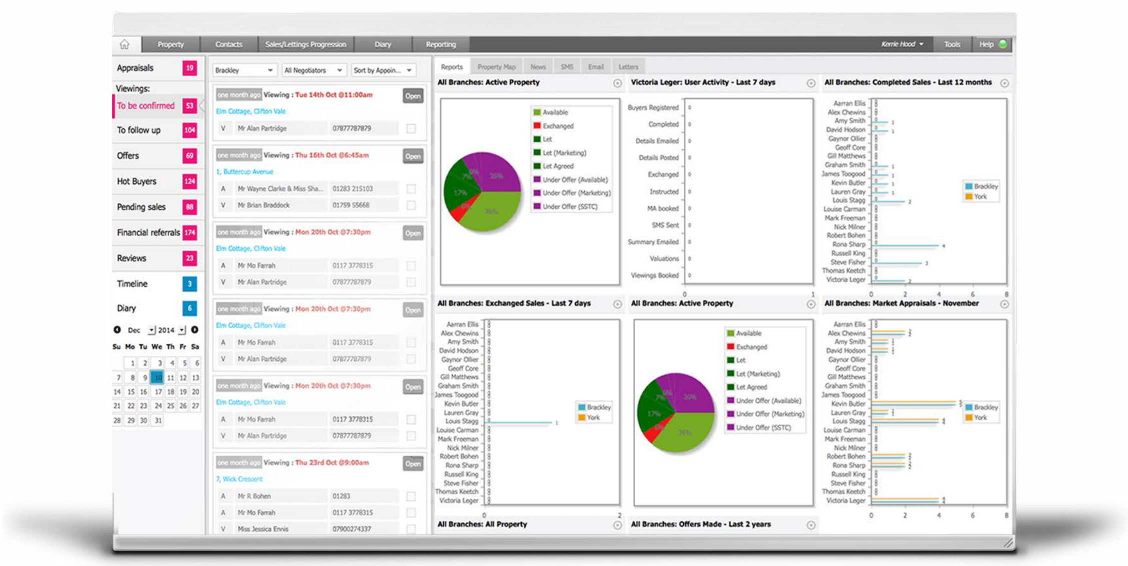
! Refrain from using your browsers back button in Alto as this will log you out.

> Alto will store any unsaved changes if your session expires or you Sign Out. To Sign Out, click your name at the top of the Home Screen and select **Sign Out**.

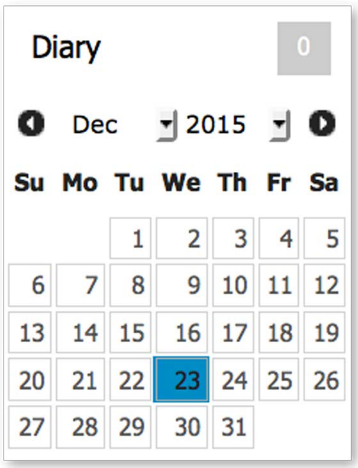
Using the Home Screen

The Home Screen has six main tabs along the top bar to access the various sections in Alto. Please note that all of the buttons and menus in Alto are single click.

Your Home Screen may appear fairly empty to begin with but as you start to use the system, items will begin to appear in the To Do List area, highlighted in pink.



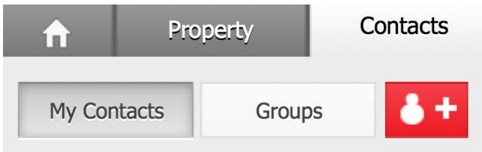
When you click into a section e.g. viewings to follow up, the relevant information is shown in the middle section of the Home Screen. This can be filtered by office or negotiator and therefore can show tasks for one user, all users in a branch or users within the entire agency. You can also filter the list using the third drop-down box.



There is also a Diary section which displays a summary of diary appointments for the selected user on the selected calendar day. A Timeline is also available, which will show notable events that occurred on the selected calendar day. Once again, this information is shown in the middle section of the Home Screen.

Adding an Applicant, Vendor or Solicitor

All people, whether they are applicants, vendors, or third party contacts, such as solicitors and estate agents, are classed as Contacts.

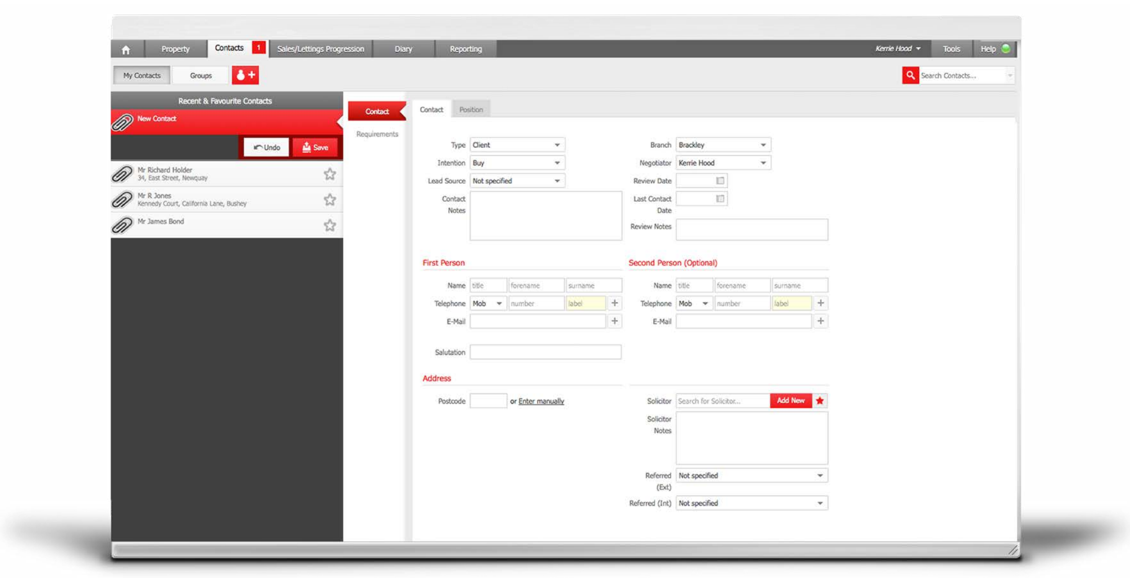


To add a Contact click on the Contacts tab next to the Property tab, then click on the **Add Contact** button.

Alto determines the status of a contact based on various linked factors. By default, a contact is defined as an applicant and somebody looking for a property.

If the contact has a property to sell then they are marked as a Vendor, if the contact has a tenancy agreement Alto will mark them as a Tenant and if the contact has a rented property they will be defined as a Landlord.

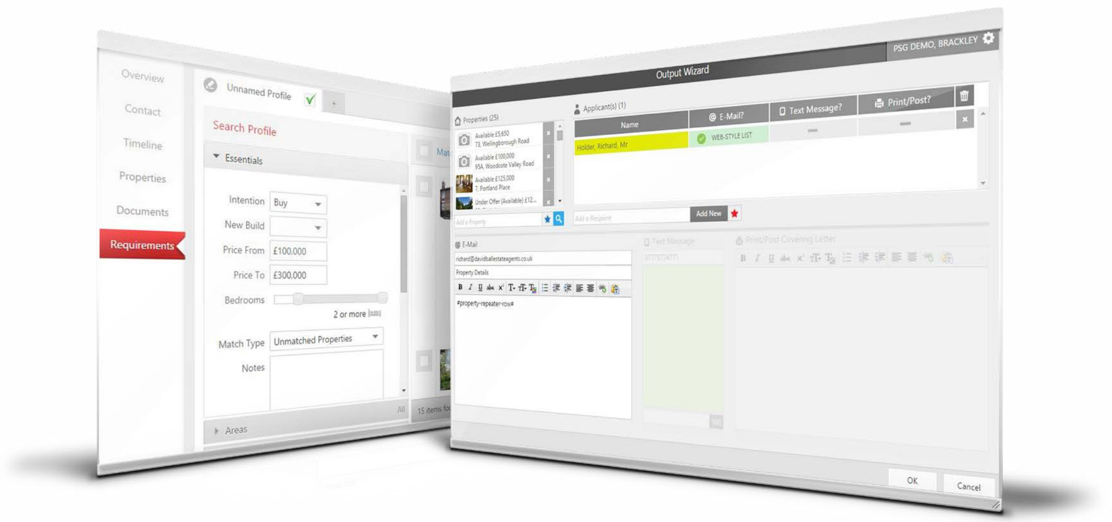
This concept is applied to prevent duplication of contact statuses in Alto.



Fill in the Contact's details as shown in your training session and remember to press the **Save** button when finished. The save button is located in the left hand column.

Matching a Contact

When you have entered the basic contact details of an applicant, click into the Requirements section to add their property requirements and send out matching properties.



Subject to the needs of the applicant, we advise you to enter details in as many fields as possible, including Price, Bedrooms, Areas and Property Type. The properties displayed in the right hand column will automatically change as requirements are updated so you can instantly see the effect the requirements make to the number of matched properties.

When finished, select the properties you wish to send with the tick boxes. You can select all properties by ticking the **Matching Properties** button. You may need to then click the link to select properties from all pages.

Click **Matches** then **Output Wizard** to display the options for sending the properties.

The cheapest format will be selected automatically for you. For example, if the contact has an email address then this will be the chosen format. However, this can be overruled by clicking in the grid.

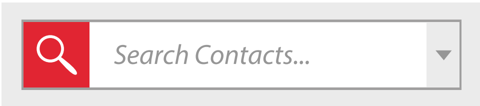
When sending an email, Web Style List is usually the best option to choose as this sends an email with the properties embedded in it, containing clickable links to take the applicant directly to that property on the web.

For printing, Browse Sheet is usually the best option as this produces a summary sheet with a number of properties per page.

Check the appropriate message in the lower part of the screen, then press **OK** to send the matching properties to your applicant.

Finding Contact Records

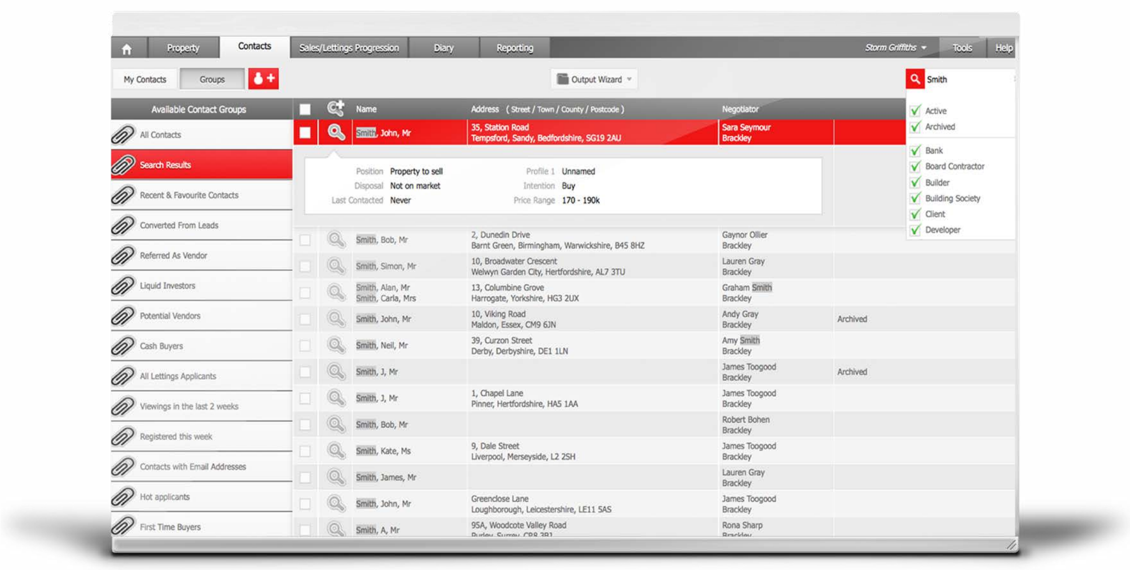
When you click into the Contacts tab, your recent and favourite contacts are shown in the left hand column. Please note that when you first use Alto this section will appear blank but as you find and work with contacts they will automatically populate the screen. Pressing the icon will make a contact a favourite, and this contact will then show at the top of the list. You can also drag a contact away from the recent and favourites if they are no longer required.



To search for a Contact, look for the search box in the top right hand corner of the screen.

You can search for a Contact by name, phone number, any part of their postal address or their email address. As you type, matching results will appear on the screen.

By clicking the drop down button on the search contacts box, you have the option to include/exclude archived contacts and/or particular property types in the search. Once a change has been implemented to the search criteria, Alto will use the chosen options as your default contact search options, until they are further amended.

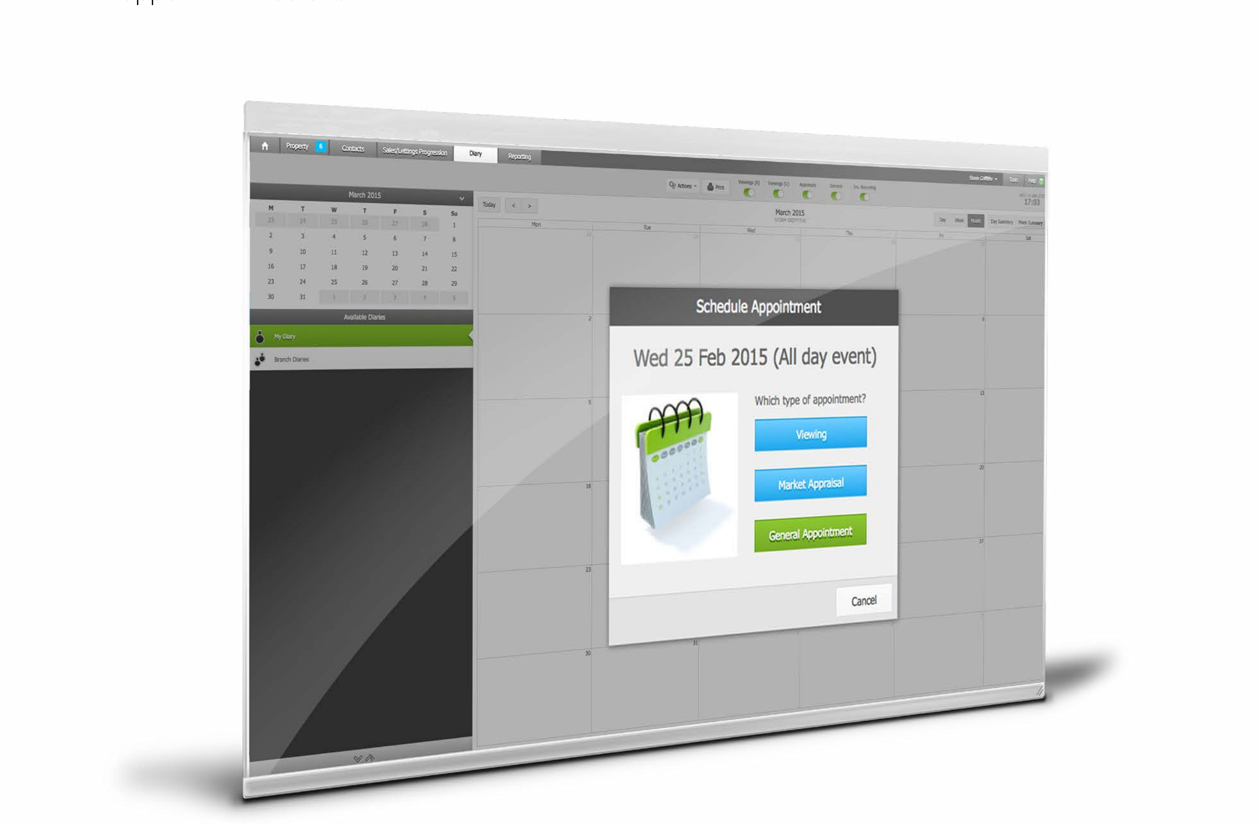


To receive further information on the contact without having to click into the contact itself, simply select the icon next to the name. If you would like to see further information for all of the contact search results, click the icon in the top header row to expand all contacts.

Once you have chosen a contact, click into it to display all details and the contact will then be added to your recently accessed contacts in the left hand column. This column will also show you a list of contact groups. Further groups can be created in the admin section of Alto.

Using the Diary

To add a Diary appointment, click on the Diary tab next to the Sales/Lettings Progression tab, then click into a time slot to make an appointment. If you hold your left mouse button down, you can drag to select the appointment duration.



A general appointment is any appointment that is NOT a Viewing or Market Appraisal, e.g. a photo visit, property inspection or a staff meeting.

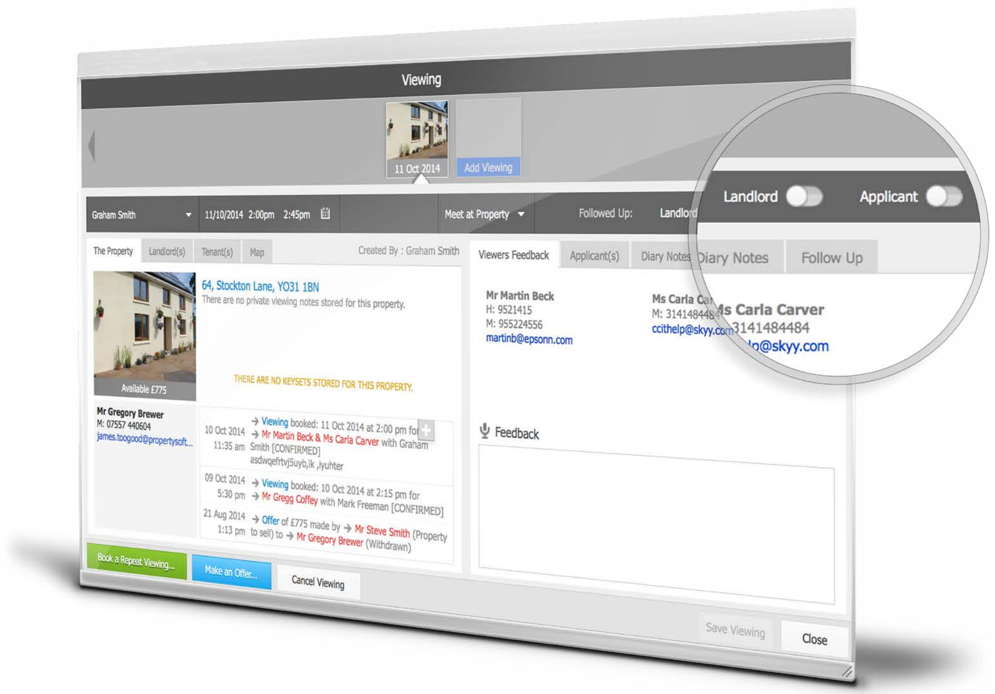
Booking a Viewing

You can arrange a viewing from the Contact or Property tabs by finding the property, clicking **Actions** followed by **Book Viewing**. Alternatively, you may wish to start from the Diary tab.

If you start from the Property tab you can find an existing contact, or Quick Add a new contact with the **Add New** button.

If you start from a Contact you may search for the property in the viewing screen.

If you start from the Diary tab, you will need to search for a property and search for an existing contact or Quick Add a new contact with the **Add New** button.



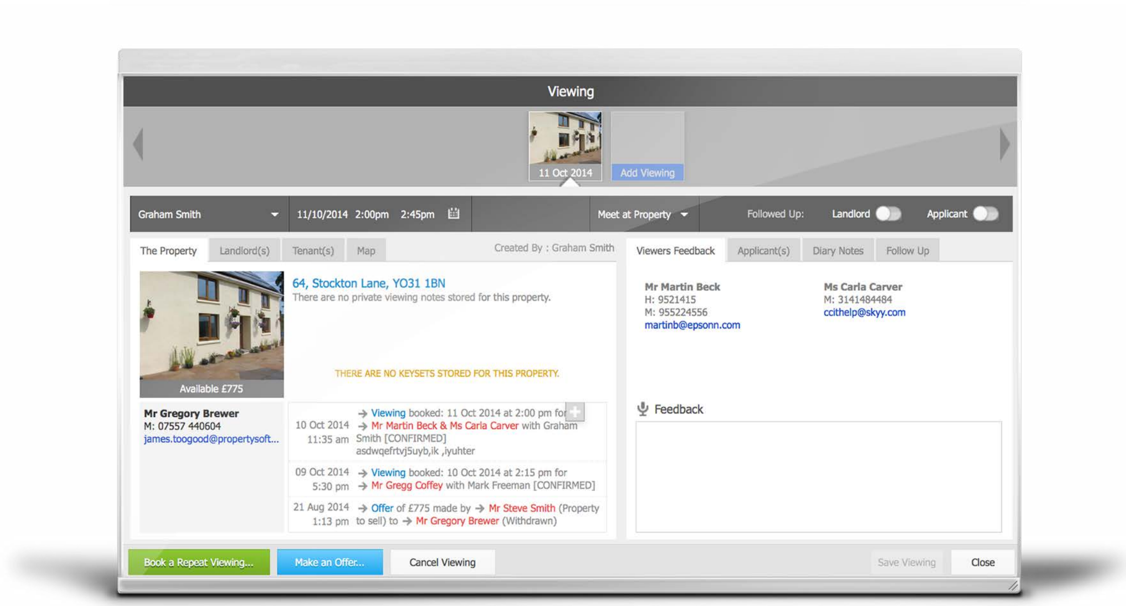
Fill in all of the relevant details and then press the **Save Viewing** button. Please note, there are switches at the top of the viewing screen to advise who you have confirmed the appointment with.

Confirming a Viewing

If either of the Confirmed switches in the viewing screen are not selected, the viewing will show up on your Home Screen under Viewings to be confirmed. You can tick the boxes or open the viewing and press the **Confirmed** switch once the appointment is confirmed. It is then possible to send an email or text message confirmation to the property owner and the applicant viewing.

Following up a Viewing

After the viewing has taken place, it will show up in the Viewings to follow up section on the Home Screen. (It is possible to configure how many days after the viewing this takes place).



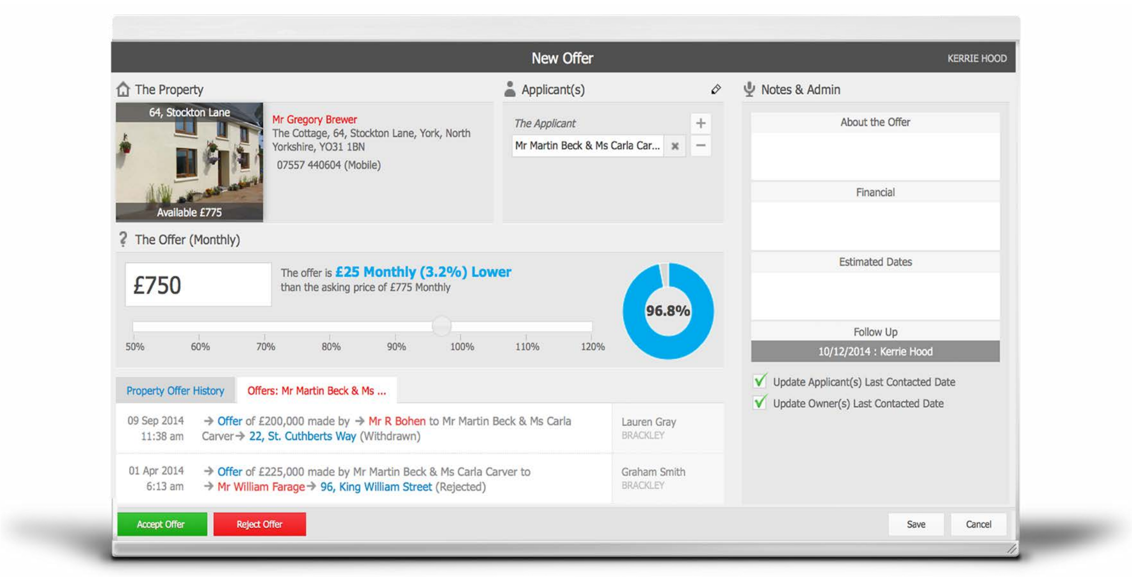
From here you can open the viewing to enter the feedback, or make an offer. The viewing will also be displayed in the property and contacts timeline where it can also be accessed. To remove the viewing from the Viewings to follow up section, press the **Followed up** switches.

Making an Offer

There are several ways to make an offer on a property in Alto.

You can find the viewing from the Home Screen in the Viewings to follow up section. Open the property and click the **Make an offer** button at the bottom of the viewing screen.

Alternatively, you can access the viewing in the Property or Contacts timeline. Simply select the property or contact, click on the **Actions** button and select the **Make an offer** button.



The offer will then be shown on the Home Screen in the Offers section, from where it can be opened to accept, reject or withdraw.

When you accept an offer, check the Property Sale Status which includes three options:

Under offer (SSTC)	Displays SSTC on websites, property no longer matches to applicants.
Under offer (marketing)	Displays Under Offer on websites, property still matches to applicants.
Under offer (available)	Displays Available on websites, property still matches to applicants.

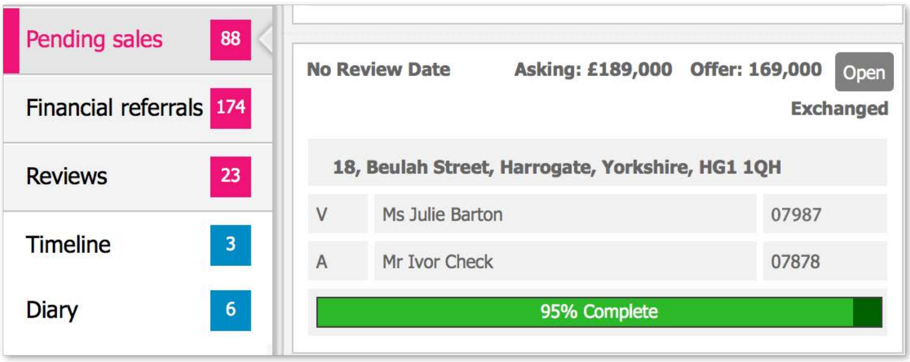
You can also check the Applicant Intention, as this can be set back to Buy if you would still like to match properties to the buyer (e.g. if they will be likely to buy again).

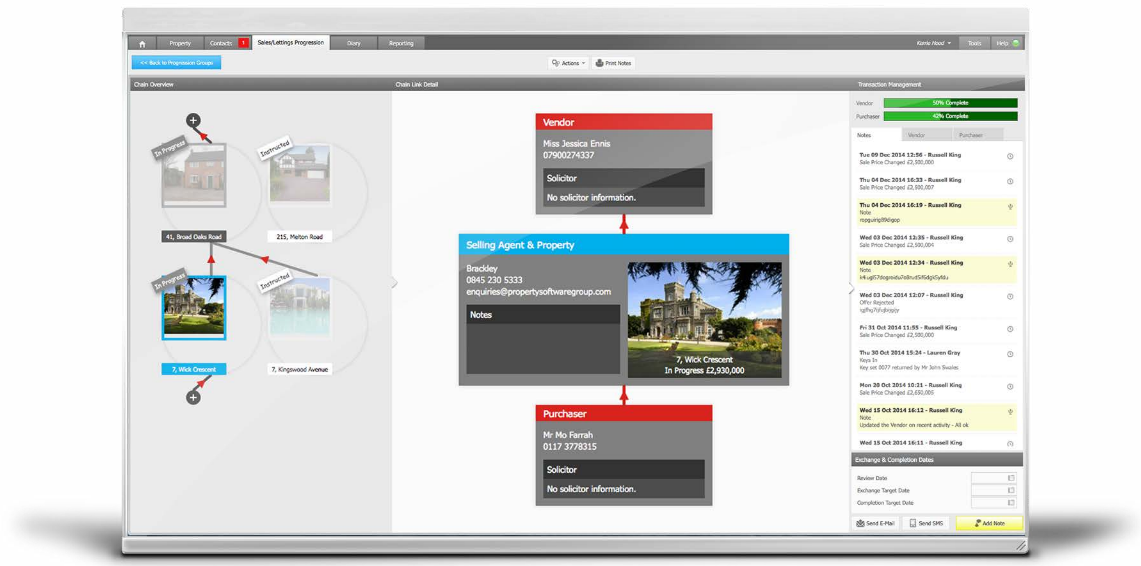
If solicitors are known they can be added, it is also possible to send a board change email to your board contractor from here.

You will also be prompted to produce the sales letters and memos which can be done at this point if Solicitors have been added. If Solicitors have not been added, you will need to run the letters through the property Docs menu with the Write Letter option.

Sales and Lettings Progression

All Sales and Lettings Progressions can be accessed and filtered in the Sales/Lettings Progression tab in Alto. When an offer is accepted, an entry will show on the Home Screen under Pending Sales. This will usually be the starting point for sales progression in Alto. The pending sales summary shows basic information, such as the asking price, sale price, vendor and applicant names, as well as a progress bar which will rise as the property gets closer to completion.





The left hand column is a Chain Overview showing all properties in the chain. Click the **+** button at the top to add upper chain details, or the lower **+** button to add lower chain details.

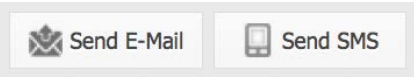
The middle section is the Chain Link Detail and this will display the vendor, property, buyer and solicitors acting for the selected property in the Chain Overview.

Notes can easily be added to this section by selecting the **Add Note** button.

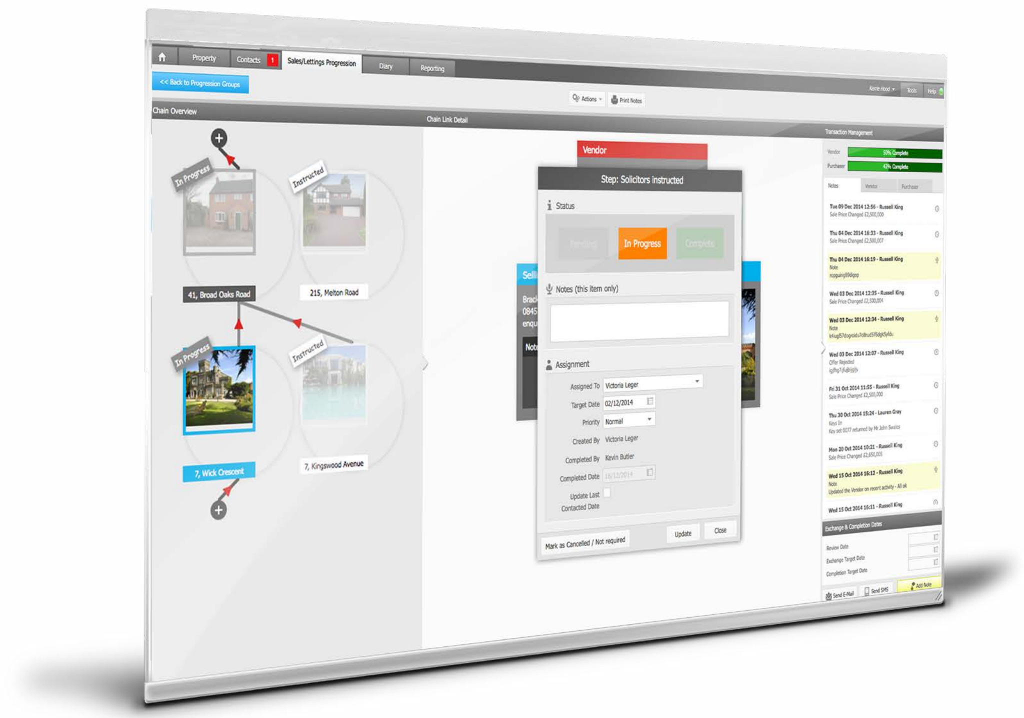
The Vendor and Purchaser sections contain various tasks to complete, which will make the progress bars rise as the property gets closer to completion. Click on a task to add notes and set as In Progress or Completed. Whilst in this section, you are also able to assign tasks to yourself to complete.

Set the review date for the next follow-up of this sale. The pending sales on the Home Screen are placed in review date order to aid sales chasing.

Update emails or text messages can be sent to the buyer, vendor and both solicitors involved, using the following buttons:

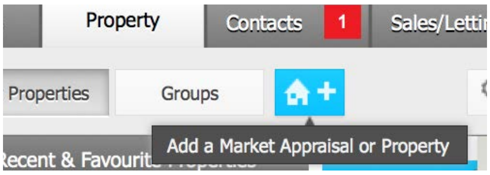


Use the Actions menu to renegotiate the sale, exchange contracts and then complete the sale.

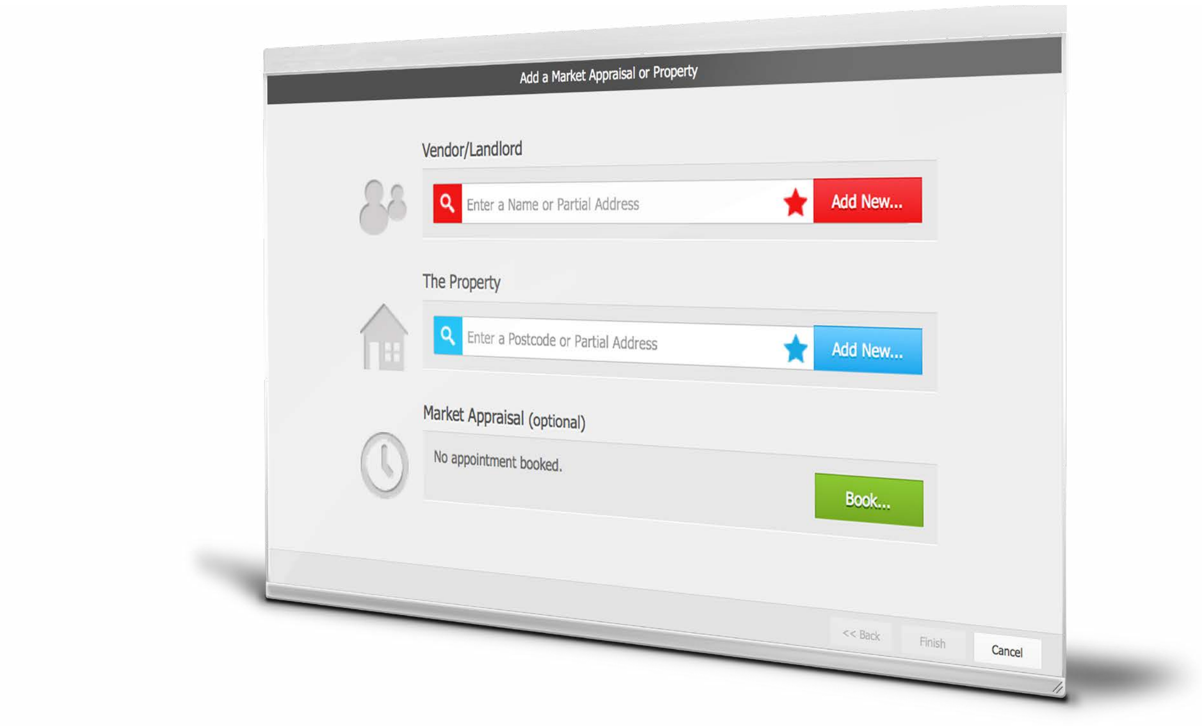


Adding a Property

To add a property, click on the Property tab next to the Home icon, then click on the **Add a Market Appraisal** or **Property** button.



You can search for existing details or use the **Add New** button to create new records. You can also book a Market Appraisal appointment if you wish to visit the property to carry out a Market Appraisal.

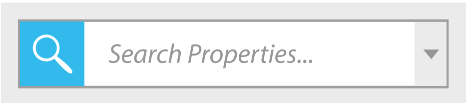


When you have completed all of the details, click **Finish** and you will be taken into the property record where you can start to type in descriptions, add photos, floor plans and EPC's as shown in your training.

Finding Property Records

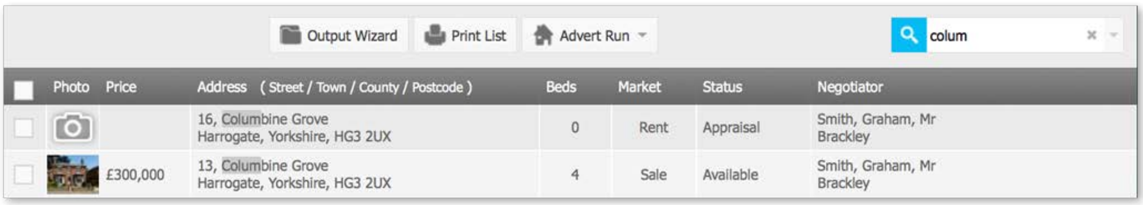
When you click into the Property tab, your recent and favourite properties are shown in the left hand column. Please note that when you first use Alto, this section will appear blank, but as you find and work with properties, they will automatically populate the screen. Pressing the star icon will make a property a favourite, and it will then be shown at the top of the list. You can also drag a property away from the recent and favourites list if you do not want it there.

To search for a property, look for the search box in the top right hand corner.



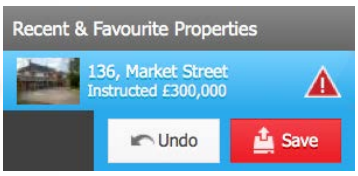
You can search for a property by any part of the address, or the postcode, e.g. 123 High Street, or DY6 8BT, or you can just type in a town to see all properties in that town.

Search results are shown below as you type.



When you click on a property to view or amend it, the property will go into your recent and favourites list in the left hand side column.

As you work with properties, don't forget to Save your changes. The Save button can be found in the left hand column.



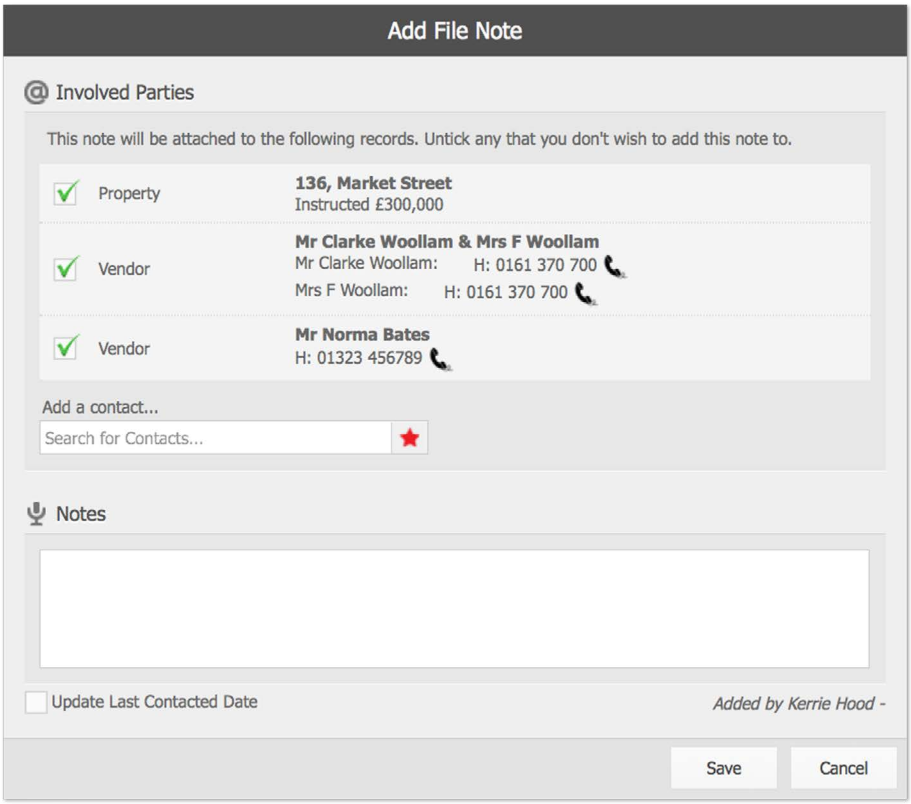
Logging Phone Calls and File Notes

As you work with properties and contacts, you can log phone conversations by pressing the phone button  on the overview screen.

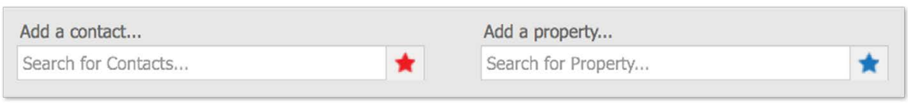
Hold your mouse pointer on the phone icon to see the telephone numbers. If you have the optional TAPI interface then it is possible to auto dial the number on your phone system.

Enter notes from the conversation then press **Save** and the notes will be added to the timeline.

You can add file notes with the + button on the overview screen.



It is also possible to link the phone call or file note to a property or contact by searching for them in the search boxes.

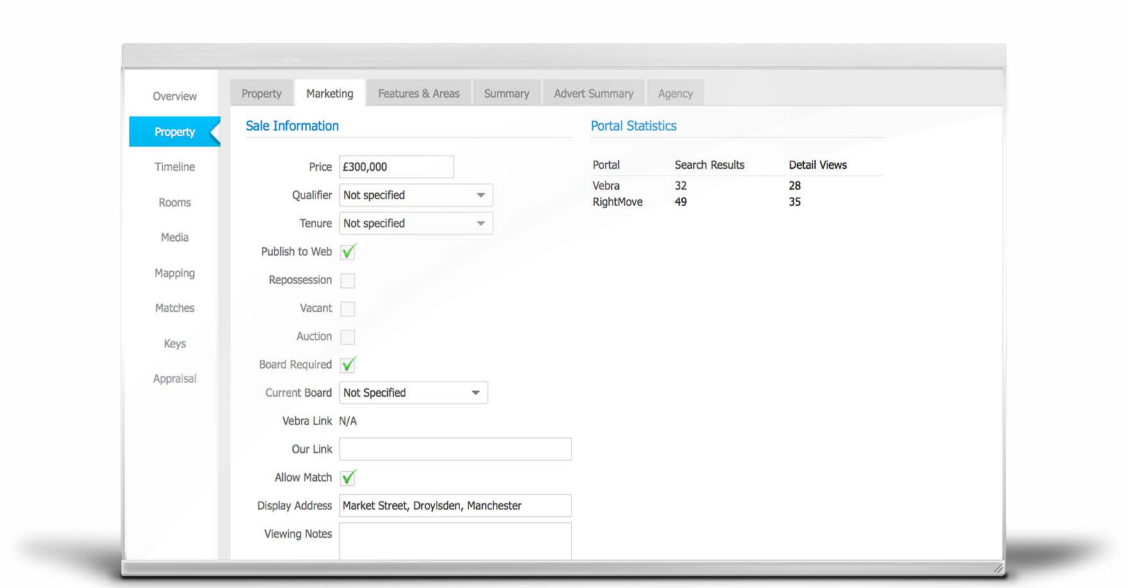


Uploading Properties to Vebra.com

Unless otherwise arranged, with a new install of Alto your properties will begin uploading to Vebra.com automatically. In order for a property to appear on Vebra.com, the property needs to have a status of Available, Under Offer (SSTC), Under Offer (Marketing), or Under Offer (Available), and the Publish To Web option in the Marketing section of the Property record needs to be ticked.

If you have had your data converted from a legacy product, you will need to check that your properties are all set to the correct status and ensure the property data is correct. When you have done this please email residentialinstalls@propertysoftwaregroup.com and we will then arrange your first internet upload.

! Please note that during the data checking process, you may need to use your old software to update websites or add new properties.



Once the property has been published to the web, the link to the property on Vebra.com will appear next to the Vebra Link field in the Marketing section.

Further Assistance

If you require further assistance, please contact the relevant department using the details provided below.

Support
Tel: 08451 305 444
Email: support@vebra.com

Customisation
Tel: 08430 220 932
Email: customisation@propertysoftwaregroup.com

Training
Tel: 08446 626 455
Email: training@vebra.com

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