Complete Data

TRAINING MANUAL

Updated 22/7/14

Complete Data

Contents

Main Menu

Main Menu

Navigating the Main Menu

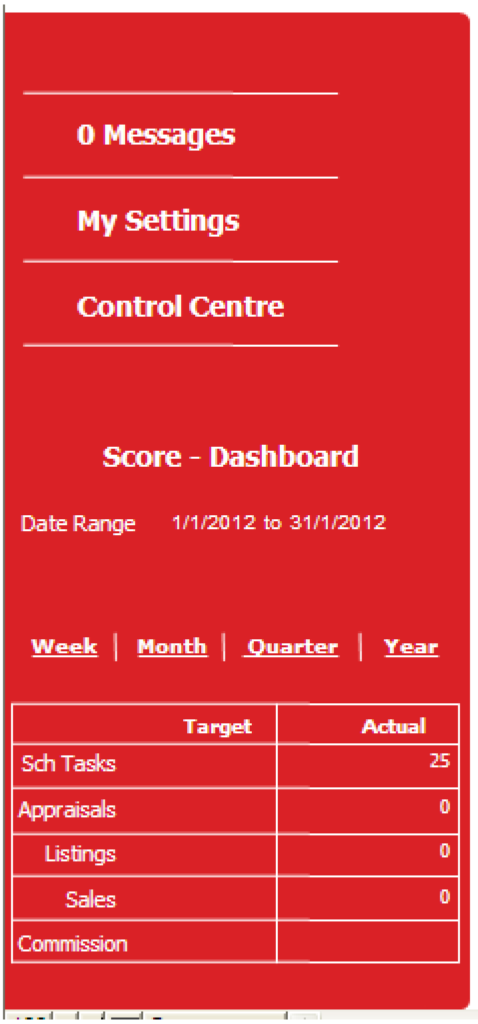
Complete Data Main Screen

The Main Menu is the first screen you see when **Complete Data Professional** is launched. This is your access point for every part of the program. Should you become lost, simply click the Complete Data logo (found in the top left hand corner of every window) and you will be returned to the Main Menu.

What can you see and do on the Main Menu

1. The 6 red buttons perform the following functions:
2. **Contacts** opens the Contacts database, which contains contact details for vendors, buyers etc.
3. **Scheduled Tasks** opens the Scheduled Tasks database, where all your scheduled activities for contacts and listings are stored, e.g. phone calls, emails, SMS's and letters. Prospecting Tasks set from the Service Area are also stored here under the My Prospecting option.
4. **Enquiries** opens the Enquiries database where you can track your enquiries (a subset of the Contacts database).
5. **Service Area** opens the Service Area database. This is a database where you record properties and owner details in your farm area. From here you can also prospect and prepare CMA reports.
6. **Appraisals** opens the Appraisals database and displays all previously entered market appraisals.
7. **Listings** opens the Listings database and displays all currently listed properties.

Part 2



1. **Messages** opens the Messages database which is used for internal office messaging to staff via SMS and email.
2. **My Settings** this is where you set up your personal information and preferences.
3. **Control Centre** summarises important data in one screen, saving you time.
4. **Score - Dashboard -** View and track the information entered into the database against the targets you set yourself. Select you time line of Week, Month, Quarter, Year this will automically draw the information from the database for your ID for: completed scheduled tasks, Appraisals entered within the date range, Listings, Properties marked as status exchanged, Agent Fees entered and marked as status exchanged

Part 3

Backup | Close

1300 367 412

1. **Backup** automatically backs up **Complete Data Professional** - **Single User** into a compressed .zip file (Multi User backups are automatically performed on the server computer at scheduled intervals). **Note:** It does not back up the Microsoft Word mail merge letters which should be backed up separately.
2. **Close** exits **Complete Data Professional**.
3. 1300 367 412 - **Real Estate Academy** contact number for support and training

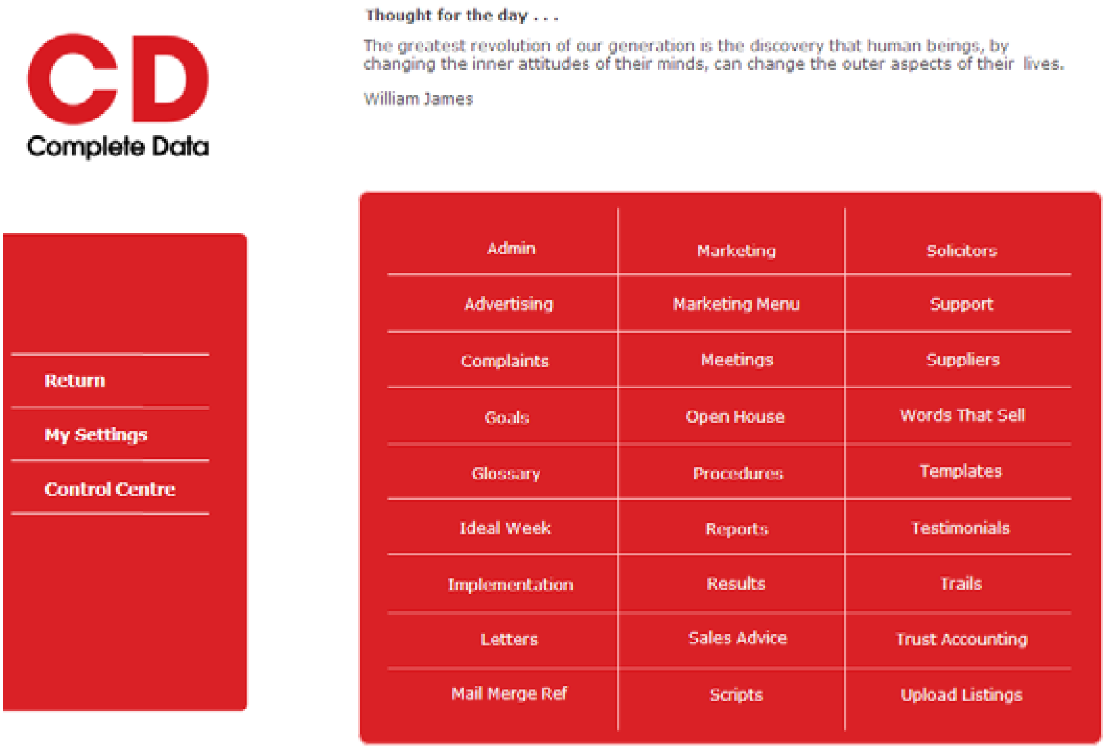
Part 4

1. **Systems** takes you to the Systems screen where you set up letters, trails & templates
2. **Training & Events** - takes you to the Real Estate Academy website
3. **Education** - takes you to the reamember website
4. **GoToAssist** click on this button, if you are requested by a technical support representative, to begin a remote online help session.

Systems

Systems

Here is a brief outline of the functionality of each button on the Systems screen:



1. **Admin** is a section for the local administrator of **Complete Data Professional**, where they can create and delete users and reset passwords.
2. **Advertising** opens the Advertising database: all marketing campaigns from the Marketing database are stored here.
3. **Complaints** opens the Complaints database where you can record and track any complaints against your office.
4. **Goals** opens the Goals database, where users can enter their personal goals and track their progress.
5. **Glossary** opens the Glossary database, which contains definitions for common real estate industry terms.
6. **Ideal Week** opens the Ideal Week database, where you can plan a colour-coded view of a highly productive week.
7. **Implementation** opens the Implementation database, where you can track office projects and tasks (linked to the Meetings database).
8. **Letters** opens the Letters database where you can set up and store records of all the Microsoft Word letters used within **Complete Data Professional**.
9. **Mail Merge Ref** opens a database containing all the merge fields that are used by **Complete Data Professional** and Microsoft Word letters. It is useful for administrators creating custom-designed letters in Microsoft Word.

1. **Marketing** opens the Marketing database where you construct marketing campaigns.
2. **Marketing Menu** opens the Marketing Menu database. This contains all the individual items that are used to build your marketing trails/campaigns.
3. **Meetings** opens the Meetings database, where you can track company meeting agendas, notes and tasks.

4. **Open House** opens the Open House database, which contains open house inspection times for all properties.
5. **Procedures** opens the Procedures database, a central repository of your office policies and procedures.
6. **Reports** takes you to the Reports screen where you can access a number of pre-loaded reports for salespeople and principals.
7. **Results** opens the Results database where you can track your Key Performance Indicators (KPI's).
8. **Sales Advice** shows any listings with a status of 'Exchanged'.
9. **Scripts** opens the Scripts database, which contains dialogue to help you overcome objections when dealing with buyers and vendors.

1. **Solicitors** opens the Solicitors database, which contains contact details for solicitors and is used when generating letters for listings once they have exchanged.
2. **Support** opens a database of common questions and answers asked on Complete Data with the ability to email a question to the Complete Data Support Team.
3. **Suppliers** opens the Suppliers database, where you can store contact details for regular suppliers and tradespeople.
4. **Words That Sell** opens the Words That Sell database, where you can record advertising text for future use.
5. **Templates** opens the Templates database, where you can setup and store email and SMS templates.
6. **Testimonials** opens the Testimonials database. All testimonials entered from the Contacts database are stored here.
7. **Trails** opens the Trails database, where you can setup a series of scheduled activities for any contact or listing.
8. **Trust Accounting** opens the Trust Control Centre where you can view and search for transactions, print reports and perform a reconciliation.

On the left of the Systems screen you have:

1. **Return** which takes you back to the Main Menu.
2. **Control Centre** summarises important data about your contacts, listings and scheduled tasks in one screen, saving you time.
3. **My Settings** is where you set up your personal information and preferences.

Letters

Complete Data comes with 71 letters. You must make sure that the letters reflect how you do business

The letter types that are supplied in Complete Data Professional

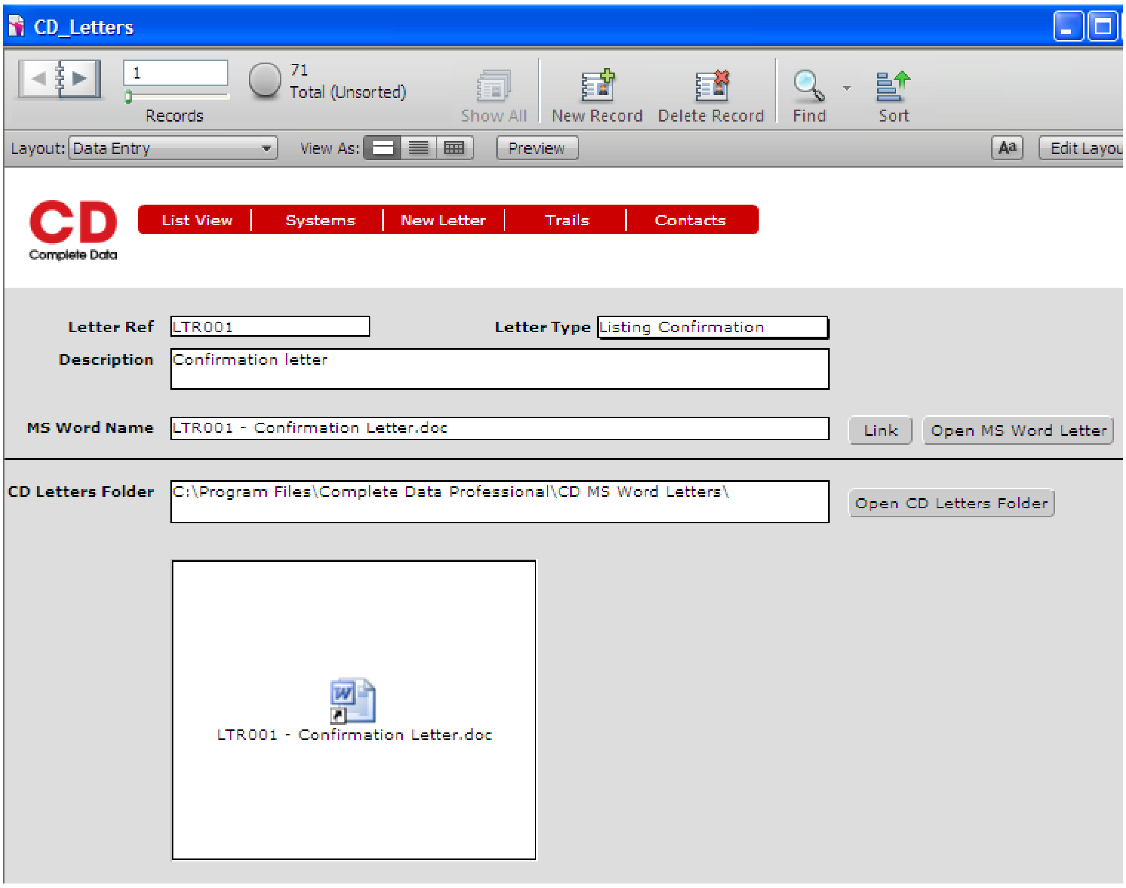
The supplied Microsoft Word mail merge templates are divided into the following categories:

- **Anniversary** these letters are available in the Contacts database when setting a trail/activity.
- **Buyer or Prospect** these letters are available in the Contacts/Enquiries database when setting a trail/activity.
- **Listing** these letters are available in the Listings database when setting a trail/activity.
- **Listing Confirmation** these letters are available in the Appraisals database when printing a Confirmation Letter.
- **Service Area** these letters are available in the Service Area database and are used when prospecting.

To customise one of the supplied templates you need to open the Letters database (if you are not intending to send any mail merge letters from **Complete Data Professional** you can skip this process).

1. Go to the **Complete Data Professional** Main Menu.
2. Click the Systems button on the left hand side of the screen.
3. Click the Letters button. You will be presented with a list of all the current letters in the database.
4. Click the Details button to the right of the screen on any one of the letters to view more information about each letter. You will see a screen displayed as follows:

Letters Data Entry



This screen displays full details about a particular letter, including a description of the letter, the Letter Type, the file name and where it is stored on your computer or network drive.

1. Click on the Open MS Word Letter button to open the document in Microsoft Word and make any changes you require (just as you would with any other Microsoft Word document). When you have finished making your changes, click the Save button and close the letter. You can repeat this process for other letters that you wish to customise.

Mail Merge letters get the data to merge into the letter from a data source file which is generated by **Complete Data Professional** every time you print a letter from your Scheduled Tasks list. This data source file contains a list of the merge fields available to Microsoft Word - you can see the list of available merge fields by going to the Main Menu>Systems and clicking on the Mail Merge Ref button.

Adding A New Letter

Complete Data Professional comes with some spare letters that you can customise to suit your needs. Should this be insufficient to meet your requirements, you can always add an unlimited number of additional letters as well. There are 5 spare letters for each of the following most commonly used letter types:

- Buyer or Prospect
- Listing
- Listing Confirmation

We recommend duplicating these letters first (see below).
To create a brand new letter:
Go to the **Complete Data Professional** Main Menu.
Click the Systems button on the left hand side of the screen.
Click the Letters button. You will be presented with a list of all the current letters in the database.

From the list, locate a spare letter with the same Letter Type and similar format to the one you wish to create. Click the Details button and make a note of the location of the CD MS Letters Folder (i.e. the folder on your computer or server where all the Mail Merge letters are stored) as you will need to save your new letter to the same folder.
Click the Open MS Word Letter button to open the document in Microsoft Word (**Note:** Should you get a dialogue box warning about an SQL command, select 'Yes') From the File menu select Save As and navigate to the CD MS Word Letters folder that you noted at the previous step. Enter a name for your new letter and click Save.
We recommend keeping the naming/number convention when naming your letters eg:
LTR003 Thank you for Listing Letter

Now with your new letter you can make any changes to your new letter and enter in your letter text.
You can use the Mail Merge toolbar to preview how your letter will appear with customer details in place of the merge fields. Click the View Merged Data (<<ABC>> icon on the toolbar) to switch between editing and previewing how the letter will appear. If you cannot see the Mail Merge toolbar go to the View menu>Toolbars and make sure there is a tick next to Mail Merge.
When you have finished making your changes, click the Save button and close the letter.
Note: Make sure you are viewing the merge fields and not a contact's details before clicking Save.
For more information on working with Mail Merge letters and inserting merge fields consult one of the following:

- Your Microsoft Word documentation
- Online help
- The training movies on the **Complete Data Professional** training CD.

To add your new letter to the Letters Database:

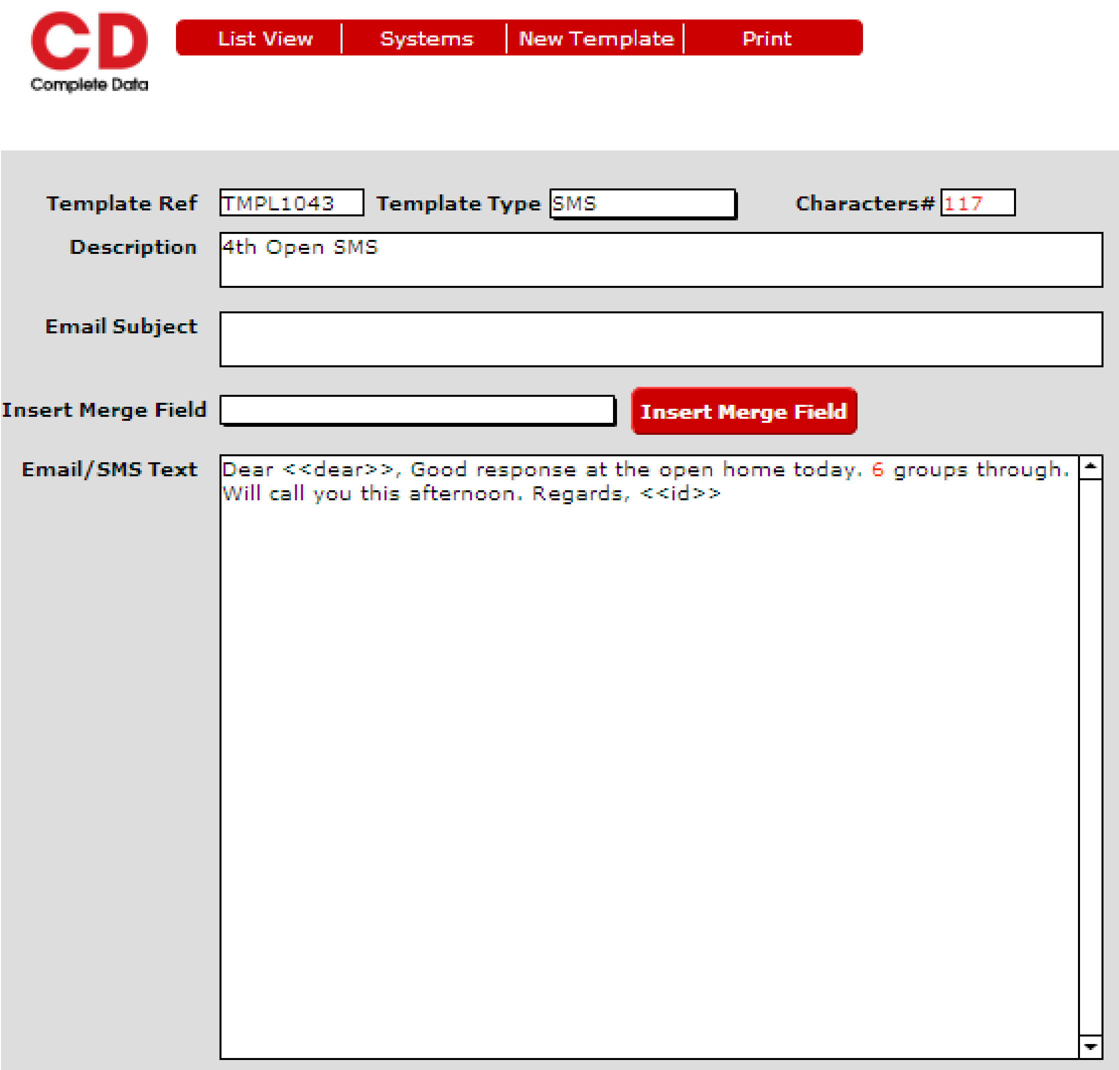
To add your new letter to the Letters Database:
Return to **Complete Data Professional** - you should be still in the Letters database viewing the details for the original letter you opened. Select the New Letter button to create a new blank record in the Letters database.
Select a Letter Type from the drop-down menu and then enter a description for your new letter. Click the Link button to link your new Microsoft Word document that you saved into the CD MS Word Letters folder in the previous sets (Creating a new letter). The MS Word Name and CD Letters Folder will be filled in automatically.
To make it easier linking Microsoft Word documents to the Letters database we have used a naming convention for the standard Microsoft Word letters that we included within **Complete Data** Professional. All the Microsoft Word documents have the associated Letter Ref from the Letters database as the first part of the file name (e.g. LTR001 - Confirmation

Letter.doc. We recommend continuing to use this naming convention as it reduces any confusion about which Microsoft Word document is associated with which record in the Letters database. **Note**: the Letter Ref is generated automatically by **Complete Data Professional** at the time you create a new letter.

Email and SMS templates

1. Go to the **Complete Data Professional** Main Menu
2. Click the Systems button on the left hand side of the screen.
3. Click the Templates button. You will be presented with a list of all the current templates in the database.
4. To view more information about one of the templates click the Details button to the right of the Template Type column and you will see a screen displayed as follows:

To customise one of the standard email and SMS templates, open the Templates database



1. This screen displays full details about a particular template as follows:

- **Template Ref** this is generated automatically by **Complete Data Professional** and cannot be changed.
- **Template Type** select from either Email or SMS.
- **Characters #** displays the number of characters in the Email/SMS Text field. This is useful for ensuring your SMS templates do not exceed the 160 character limit.

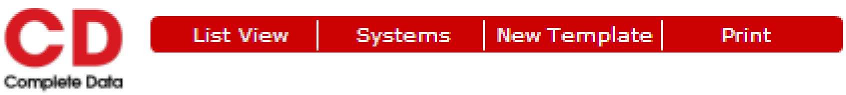
- **Description** a summary describing the template (e.g. Vendor SMS Template).
- **Email Subject** the subject of the email for the template.
- **Insert Merge Field** displays a list to enter merge fields into the template.

To insert a merge field into a template, select the required merge field from the Insert Merge Field drop-down menu, position the cursor in the Email/SMS Text field where you wish the merge field to appear, then click the Insert Merge Field button and the selected merge field will be inserted into the text of the template.
Complete Data Professional will substitute the merge field for the data from the contact record at the time you insert the template into an email or SMS.

- **Email/SMS Text** - the actual text of the template including any merge fields.

Simply make any changes to the Email/SMS Text field at the bottom. For email templates you can also change the Email Subject as required. Remember, SMS templates must contain no more than 160 characters - the total number of characters is displayed in red in the Characters # field (top right hand corner of the screen).

How to create a new template



To create a new template, simply select the New Template button and fill in the necessary fields, ensuring that you select either Email or SMS for the Template Type.
See below template merge fields you are able to use in Email & SMS templates:

- **<<dear>>** - Left side Letter Salutation from CD_Contacts. This is also used for Enquiries.
- **<<address_line1>>** - Left side Address Line 1/Format Greeting field in CD_Contacts. Useful for letters where you wish to enter the first line of the address (e.g Mr and Mrs Smith or Bob and Jenny Smith). This is also used for Enquiries.
- **<<first_name>>** - Left side First Name from CD_Contacts. This is also used for Enquiries.
- **<<surname>>** - Left side Surname from CD_Contacts. This is also used for Enquiries.
- **<<address_one>>** - Left side First line of postal address from CD_Contacts. This is also used for Enquiries.
- **<<address_two>>** - Left side Second line of postal address from CD_Contacts. This is also used for Enquiries.
- **<<suburb>>** - Left side Suburb of postal address from CD_Contacts. This is also used for Enquiries.
- **<<state>>** - Left side State of postal address from CD_Contacts. This is also used for Enquiries.
- **<<postcode>>** - Left side Postcode of postal address from CD_Contacts. This is also used for Enquiries.
- **<<email>>** - Email address of left hand contact from CD_Contacts.
- **<<id>>** - ID from CD_Contacts. This is also used for Enquiries.
- **<<id_email>>** - Email address for the ID from CD_Contacts.

- **<<id_mobile>>** - Mobile Phone number for the ID from CD_Contacts.

Customising Trails

Trails are one of the most important features of **Complete Data Professional**. A trail is a series of activities that you can set against a contact or appraisal/listing designed to prompt you to stay in touch with them or activities that need to be done for that listing or contact. Given that real estate is all about nurturing relationships with buyers and sellers, and you have so many of them, **Complete Data Professional** really comes into its own with trails. **Complete Data Professional** allows you to do what your brain can't possibly do. It can set trails for all your contacts (both buyers and sellers) and remind you when and by what means you should make contact with them and for what purpose.

The Trails database is where you construct the relationship you will have with each Contact or Appraisal/Listing. At the click of a button, you can automatically schedule phone calls, letters, emails, SMS's and other tasks for a Contact or Appraisal/Listing.

The tasks of a trail appear in the Scheduled Tasks database automatically for follow-up by salespeople and sales support staff. Every contact needs to have some point of future contact. If you are not prompted to start a new trail with a new client - our experience says that you will forget!

Trails

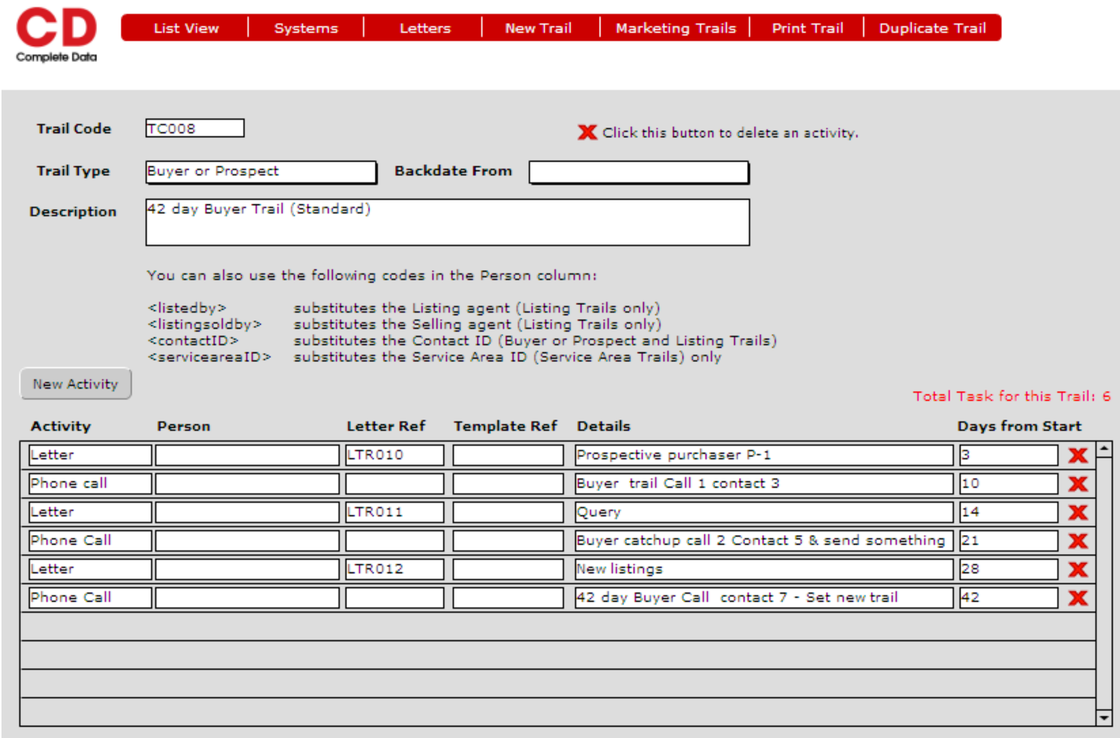
Systems | Letters | New Trail

Trail Code	Trail Type	Description	
TC001	Anniversary	Client Care 15 Year Anniversary Trail	Details
TC008	Buyer or Prospect	42 day Buyer Trail (Standard)	Details
TC015	Buyer or Prospect	On Hold Trail	Details
TC018	Buyer or Prospect	Sample Enquiries Trail	Details
TC002	Listing	Potential Vendor - High Motivation (Standard)	Details
TC003	Listing	Contracts Exchanged trail	Details
TC004	Listing	Awaiting contract trail (Standard)	Details
TC005	Listing	Buyer Awaiting Settlement - Home Buyer (Standard)	Details
TC006	Listing	Contract Received trail (standard)	Details
TC007	Listing	Awaiting Settlement Trail -Vendor (Standard)	Details
TC009	Listing	Potential Vendor - Medium Motivation (Standard)	Details
TC010	Listing	Potential Vendor - Low Motivation (Standard)	Details
TC011	Listing	Deposit Taken trail	Details
TC014	Listing	Follow Up Appraisal	Details
TC012	Marketing	Sample Marketing Campaign	Details
TC013	Service Area	Service Area Sample Trail	Details

Complete Data Professional provides you with 16 standard trails. You can allocate separate trails for buyers and vendors; customise these trails to suit your own needs and market; you can even create your own.

The standard trails that are provided for you are:

42 Day Buyer Trail



The 42 Day Buyer Trail includes six points of contact to one buyer over a 42 day period, including:

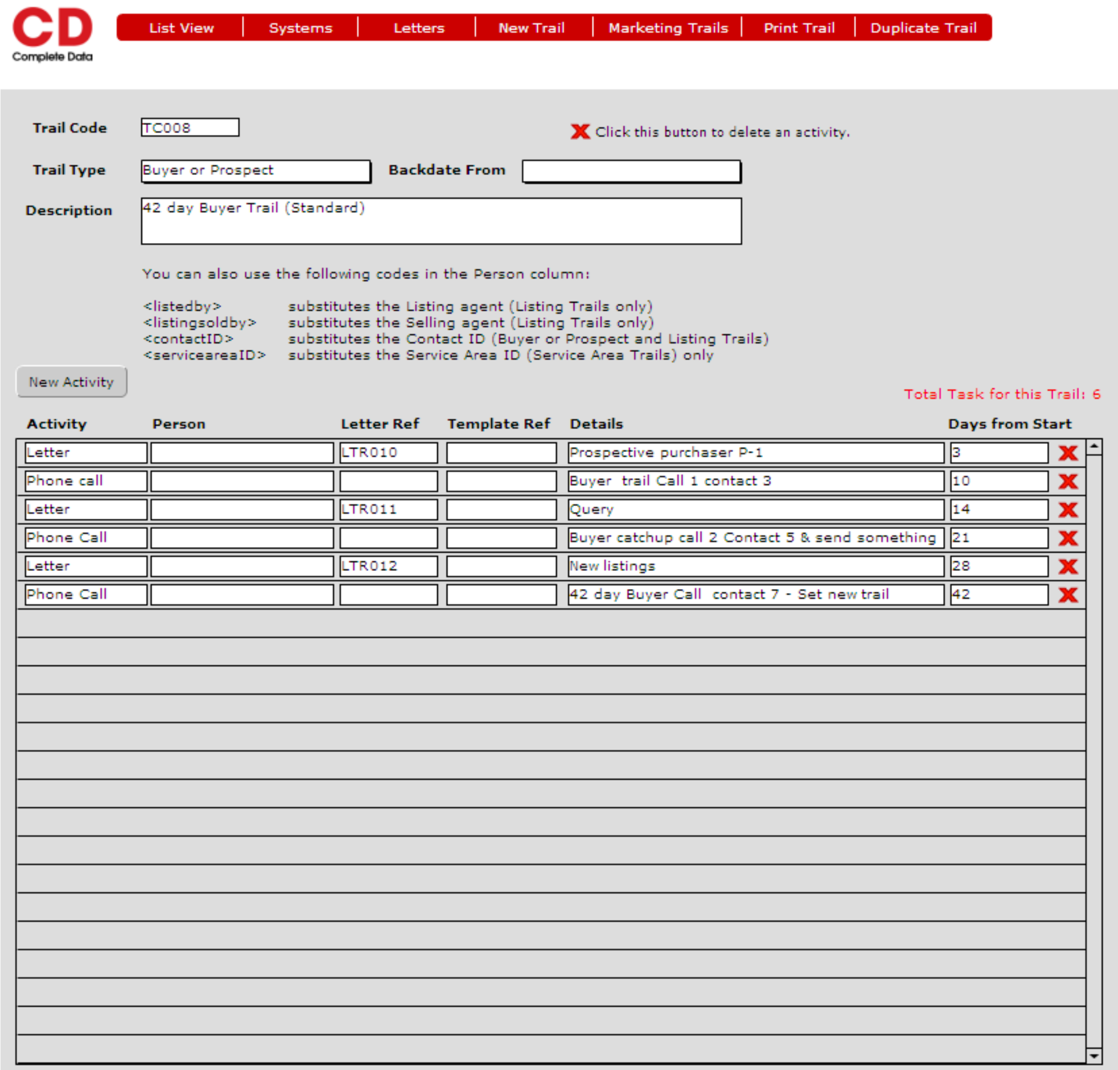
- A letter to the buyer 3 days from when you start the trail.
- A phone call to the buyer 10 days from when you start the trail.
- Another letter to the buyer 14 days from when you start the trail.
- A phone call to the buyer 21 days from when you start the trail.
- Another letter to the buyer 28 days from when you start the trail.
- A final phone call 42 days from when you start the trail.

Once you set this trail for a buyer, **Complete Data Professional** will generate six scheduled tasks over a 42 day period.

Later in this guide you will be shown how to set a trail against a contact and check which scheduled tasks are due each day - refer to the chapter titled Managing your Contacts.

If you would like to review any of the standard trails provided by **Complete Data Professional** in detail, you can print them off by clicking the Print Trail button at the top of the screen (you can only print one trail at a time). This will help you determine whether or not the standard versions suit your business

How to Customise Standard Trails



To customise one of the standard trails (or create your own) you need to open the Trails database:

1. Go to the **Complete Data Professional** Main Menu.
2. Click the Systems button on the left hand side of the screen.
3. Click the Trails button. You will be presented with a list of all the current trails in the database.
4. To view more information about one of the trails, click the Details button to the right of the Description column and you will see a screen displayed as follows:

This screen displays full details about a particular trail including the:

- **Trail Code** this is generated automatically; you cannot change the Trail Code.
- **Trail Type** there are five Trail Types which determine where the trail is available in **Complete Data Professional**:

1. **Anniversary** these trails are available in both the Contacts and Listings databases. You can set these trails against a contact or a listing and they are designed for an annual reminder of an important date (e.g. anniversary card each year from the date a property was sold to the new owner).

2. **Buyer or Prospect** these trails are available in the Contacts database only. You set these trails against a contact (e.g. a follow-up trail for a buyer).
3. **Listing** these trails are available in the Listings database only. You set these trails against an appraisal or listing (e.g. a trail to follow up an appraisal or the New Listing Trail for a property that is now for sale).
4. **Marketing** these trails are available in the Marketing database only. You set these trails against a listing via the Marketing database (e.g. a marketing campaign trail comprising all the marketing activities for that listing).
5. **Service Area** these trails are available in the Service Area database only. You set these trails against a property in the Service Area database.

- **Backdate From** - This field is used for listing and marketing trails only. It allows you to set a trail to start in reverse order, working backwards from either the settlement, listing expiry or auction dates. For example, you may want to send a letter 3 days prior to settlement, or schedule a phone call 7 days before the listing expires. When entering activities you wish to backdate, use a negative number for the Days from Start (e.g. -5 = 5 days before).

- **Description** a summary that describes the trail (e.g. potential vendor trail or hot buyer trail).

The activities the trail comprises of are listed at the bottom half of the screen. There is no limit to the amount of activities you can set for each trail. For example, the Trail Code TC015 consists of 3 phone calls - 14, 21 and 42 days from the start of the trail. If you don't want 42 days for the last call, delete this activity by clicking the red X next to the Days from Start field.

If you would like to add a new activity to this trail, click on the New Activity button and enter the details.

For each activity you can enter the following information:

- **Activity** the type of activity (e.g. phone call, letter, email, SMS, task etc).

- **Person** the name of the person who will be completing the activity. If you leave this field blank, the system will automatically enter the name of the person setting the Trail.

- **Letter Ref** if the Activity Type is a letter, you can select from one of the letters stored in the Letters database. If your Trail Type is 'Listing', you can only select letters that have a Letter Type of Listing. If your Trail Type is 'Buyer or Prospect', you can only select letters that have a Letter Type of Buyer or Prospect.

- **Template Ref** if the Activity Type is an email or SMS you can select an email or SMS template from this list. You will only see email templates for email activities and SMS templates for SMS activities.

- **Details** a brief description of the activity (e.g. follow-up phone call). If the Activity Type is 'Letter', the description of that letter stored in the Letters database is automatically entered.

- **Days from Start** the number of days from the trail start you wish this activity to be scheduled. Should you wish to set the activity to be backdated from either the settlement, listing expiry or auction date, enter a negative number (e.g. -5). That activity will then be scheduled 5 days prior to the settlement, listing expiry or auction date as selected. **Note:** you must first enter the settlement, listing expiry or auction date for a listing in order to have a trail backdate from either of those dates.

How to duplicate a trail

Use the Duplicate Trail button at the top of the screen to make a copy of an existing trail - this copies the trail and all activities that have been set for the trail. This saves you having to recreate similar trails that have many activities. To print a trail, click the Print Trail button at the top of the screen.

How to add a new trail

Click the New Trail button to create a new empty trail (the Trail Code will be generated automatically). Select the appropriate Trail Type and Backdate From selections (if needed) and enter the Description for this trail. By clicking the New Activity button you can then enter the activities for this trail one at a time. The trail is automatically sorted by the Days from Start so you do not have to worry about entering the activities in the correct order.

How to search for a trail

Click the Find button and enter the details you are searching for (e.g. all trails with the Trail Type of 'Listing'). Once you have entered your search terms click on the grey Find button on the left of the screen or simply press the Enter key on the keyboard. You can then sort the records by clicking the Sort button. To view a list of trails click the List View button.

How to exit the Trails database

Click the Complete Data logo in the top left hand corner to return to the Main Menu or click the Systems button to return to the Systems screen.

Enquiries

Enquiries

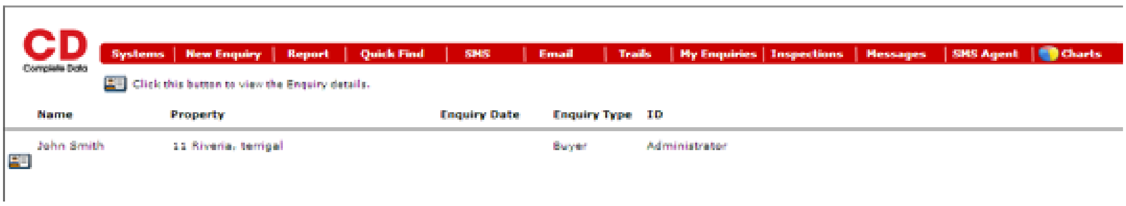
Most commonly the first point of contact you or your agency will have with a potential client is at the enquiry stage. This is the time when a person will call in or phone to enquire about either buying or selling. Never underestimate the value of an enquiry as this is an opportune time to start developing a relationship a potential client. At Complete Data, we appreciate this fact and, with this in mind, developed the Enquiries database.

The Enquiries database

The Enquiries database is known as the qualifying part of **Complete Data Professional**. This is the place to store the details of people who are not yet clients or qualified buyers but with whom you wish to develop a relationship. Remember, many enquiries go on to become your most valued contacts.

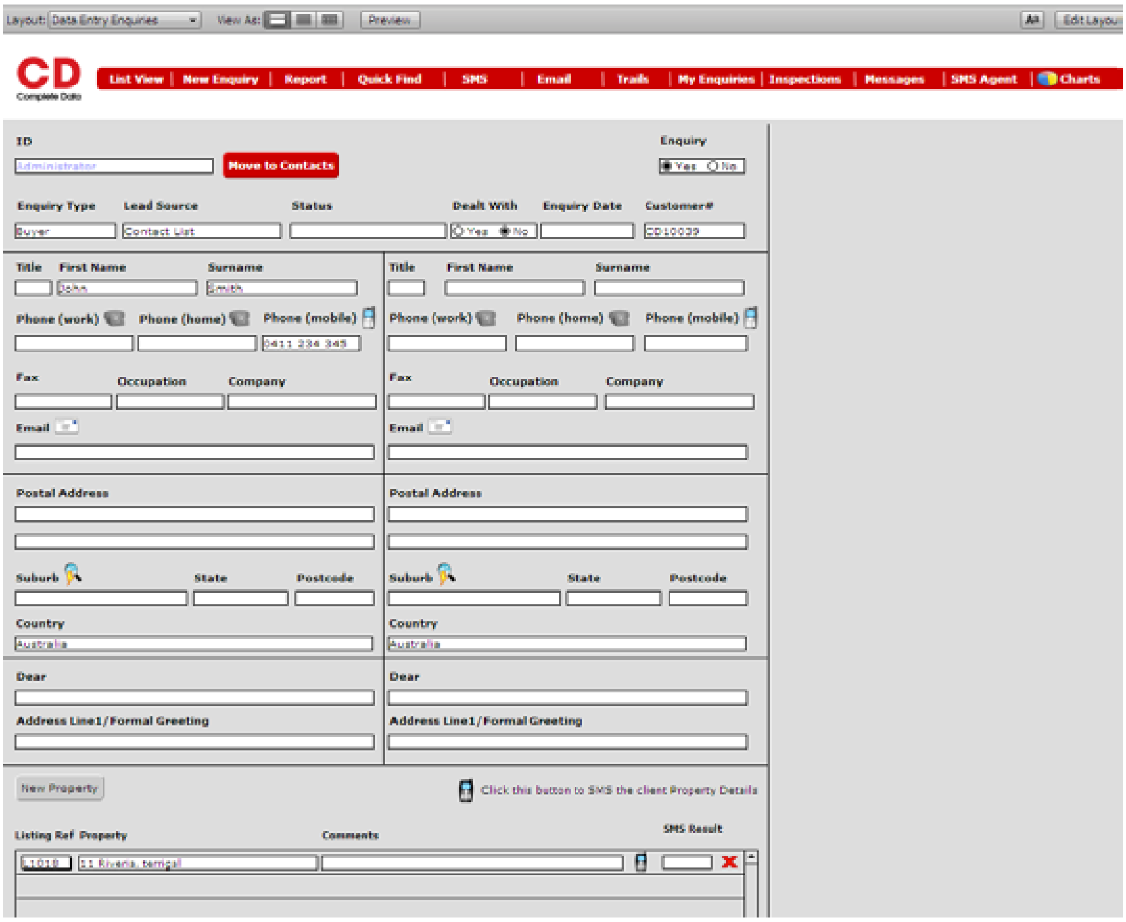
Important Note: commencing with v3.9 of **Complete Data Professional** the Enquiries database has become a subset of the Contacts database. This removes the physical separation between the two databases and resolves a number of limitations created when moving an enquiry to the Contacts database, such as losing their history of property enquiries, inspections, trails, emails and SMS records. **Complete Data Professional** v3.9 and earlier have separate Enquiries and Contacts databases.

How to open the Enquiries database



1. Go to the **Complete Data Professional** Main Menu.
2. Click the Enquiries Database button.
3. You will be presented with a list of any previous enquiries that have not yet been dealt with and that have your ID or the 'General' ID attached to them. For first time users the list will be empty and your first step will be to enter any new enquiries that you have received.

Data Entry Enquiries



1. To view the full details of an existing enquiry click the icon/button to the left of their details.

This is the main details screen where you can enter and edit details for each enquiry. As previously noted, the Enquiries database is now a subset of the Contacts database so all the functionality available for a contact record is also available for an Enquiry record. Navigation within both databases is very similar.

How to move around the Enquiries database

When you enter the Enquiries database you will see 11 red buttons across the top of the screen, which are very important:

Systems takes you to the Systems screen of **Complete Data Professional**.

Charts opens the Complete Data Chart Selector where you can create a number of bar and pie charts on the found set.

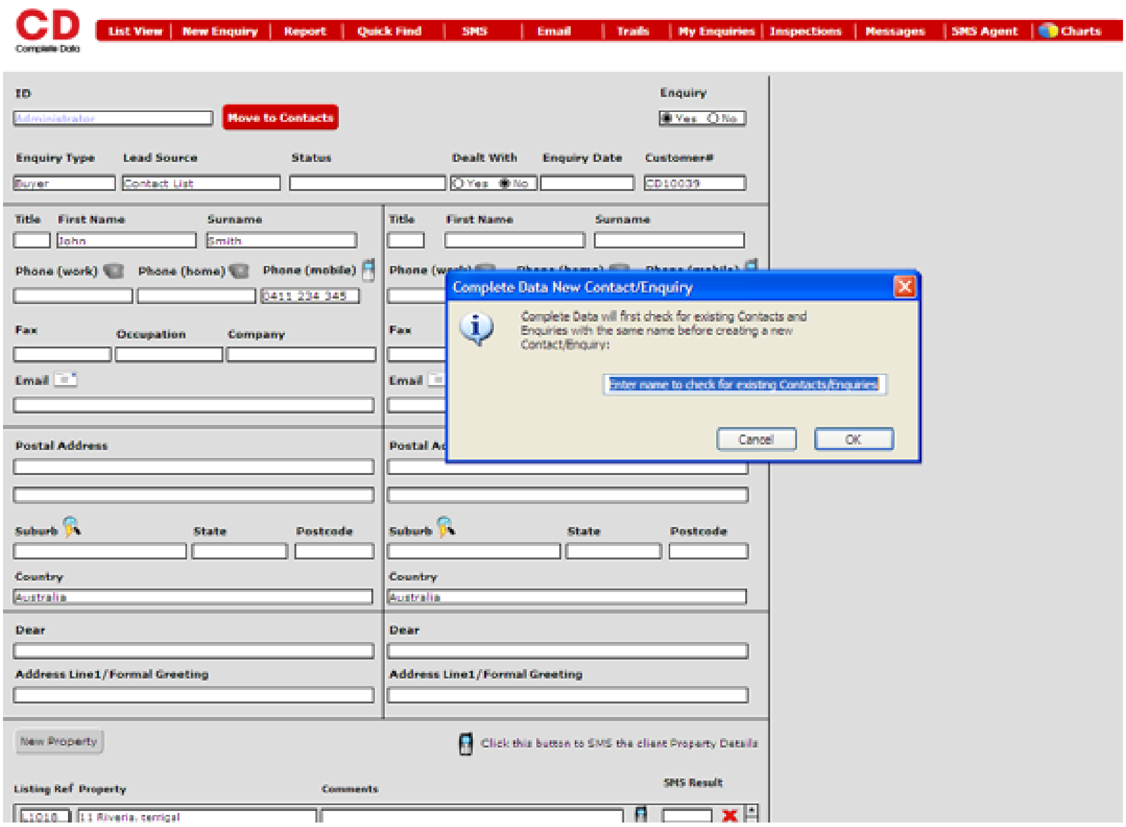
Print allows you to print a list of all enquiries.

My Enquiries shows any enquiries with your ID or "General' ID that have not yet been dealt with.

Quick Find a handy tool to quickly search for an enquiry by their name, address or phone number.

Messages opens the Messages database.
Email clicking this button allows you to send an email to the current enquiry you are viewing or a bulk email to a group of enquiries.
Report allows you to print a report for the selected enquiries or for a property.
Trails allows you to set trails and activities against an enquiry.
New Enquiry click on this button to create a new enquiry (the system will prompt you to first search for duplicates).
SMS clicking this button allows you to send an SMS to the current enquiry you are viewing or a bulk SMS to a group of enquiries.

Creating a new enquiry



1. From the **Complete Data Professional** Main Menu click the Enquiries button to open the Enquiries database.
2. Select the New Enquiry button. A dialogue box will appear asking you to search for the name in the database. This ensures that you do not enter duplicates of contacts or enquiries that are already in the system.
3. Type the surname of the person you wish to enter (e.g. 'Smith') and click OK.
4. If no matching enquiries or contacts are found a new blank record will be created.

1. Enter the details for your enquiry. It's as easy as filling out a form. **Note:** It is very important that you attempt to fill in as many fields as possible, particularly the Enquiry Type, name and contact telephone details, Status, Lead Source and Enquiry Date.
2. To record which property the person has enquired about click the New Property button (towards the bottom of the screen) and a list of all the current listings will appear. Select a property from this list.
3. Fill in the comments box if you wish.
4. To SMS the property details, click the SMS/mobile phone icon: to the right of the Comments field. The SMS will be sent immediately to the mobile phone number listed on the left hand side of the screen. Alternatively

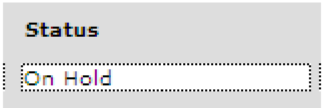
you can click on the mobile phone icon above the field where you entered the person's mobile phone number and send it this way.

If you changed the ID for this enquiry from 'General' to a specific salesperson, it will now appear in their list of enquires.

In creating your new enquiry you will have noticed some different buttons at the top of the screen:

1. **List View** - allows you to look at your current enquiries as a summary list.
2. **Inspections** allows you to create an inspection slip for this enquiry (for an existing enquiry or contact, this button will allow you to view a list of all inspections conducted to date).
3. **SMS Agent** allows you to send an SMS to the agent listed in the ID field for this enquiry, letting the agent know that this person has enquired on this property.

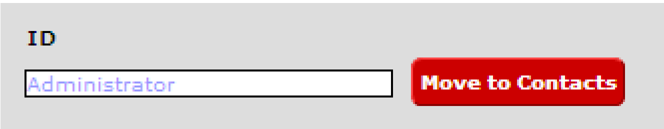
How to keep an enquiry on hold



If you have made contact with an enquiry but do not think they are a potential buyer or seller yet, it is nonetheless advisable to maintain contact with them and you can do this by performing the following simple steps:

1. Go to the **Complete Data Professional** Main Menu.
2. Click on the Enquiries button to open the Enquiries database.
3. Locate the enquiry in the list or click the Find button to search for the record.
4. Click the Details button *to* the left of the enquiry details.
5. In the Status field, select 'On Hold' from the drop-down list.
6. Select 'Yes' in the Dealt With field.

Converting an enquiry to a contact



If you have an enquiry that you think is a valuable contact and would like to move it into the Contacts database, do the following.

1. Go to the **Complete Data Professional** Main Menu.
2. Click on the Enquiries button to open the Enquiries database.
3. Locate the enquiry in the list or click the Find button to search for their record.
4. Click the Details button to the left of the Enquiry details.
5. Click the red 'Move to Contacts' button at the top of the screen.

Complete Data Professional v3.8 and earlier: All the information will be taken from the Enquiries database and added to the new record created for this client in the Contacts database. It will check for duplicates by surname as part of the process of moving from Enquiries to Contacts.

Complete Data Professions v4.0 and above on FileMaker Pro 9: as you are already editing a record in the Contacts/Enquiries database, Complete Data will flag this as a Contact type record now and take you to the Contacts screen. There is no need to create/add new records or search for duplicates as the Contacts and Enquiries databases are stored together.

Please refer to the **Managing your Contacts** chapter of this guide for information on sending email and SMS messages, setting trails and letters and recording inspections, as the process is identical for the Enquiries database.

Contacts

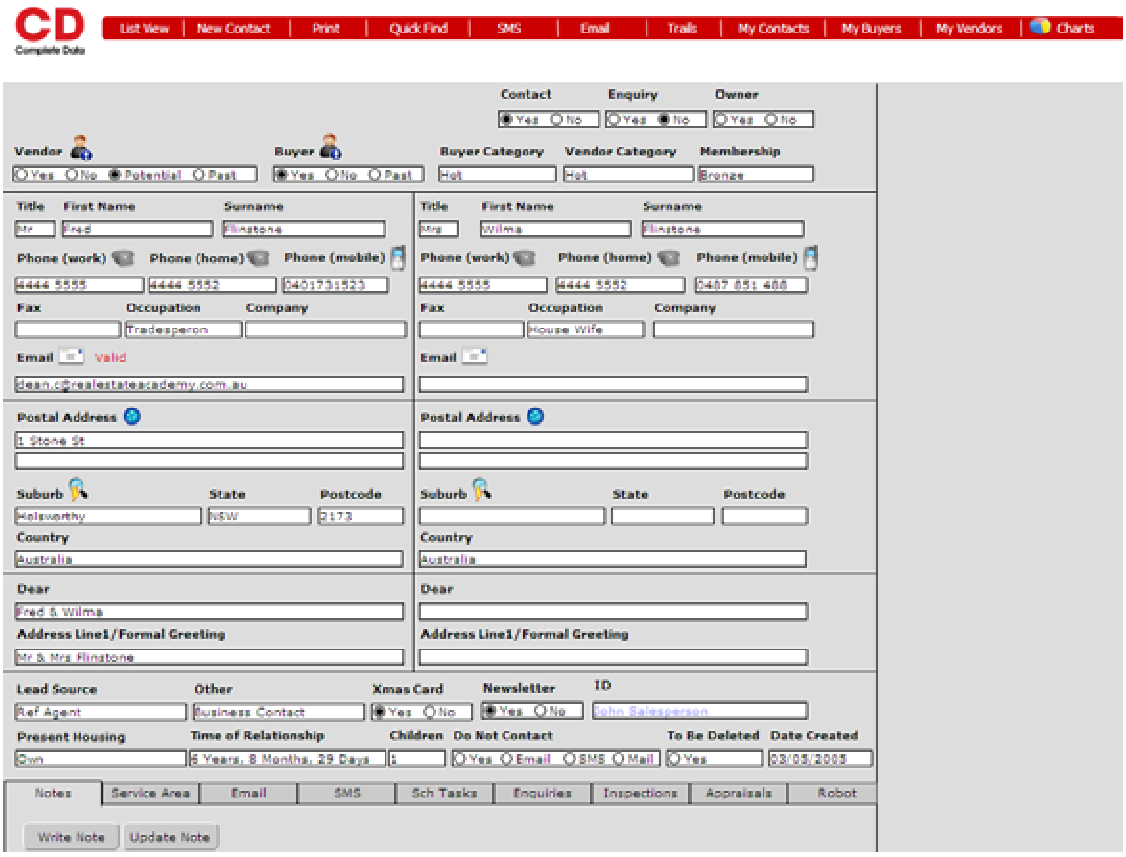
How To Access The Contacts Database

1. Go to the **Complete Data Professional** Main Menu.
2. Click the Contacts button.
3. You will be presented with a list of all the contacts in your database. For first time users the list will be empty and your first step will be to enter your contacts or import them from other sources (e.g. Microsoft Outlook or Excel). Please refer to the heading **Importing data into the Contacts database** - for instructions on how to do this.

First Name	Surname	Phone (w)	Phone (h)	Phone (m)	Fax	ID
Fred Wilma	Flinstone Flinstone	4444 5555 4444 5555	4444 5552 4444 5552	0401731523 0487 851 488		John Salesperson
Katie Tom	Cruise Cruise		4457 1154	0411 221 445		Administrator

1. To view the full details of an existing contact click the icon/button to the left of their name in the list view.

Data Entry Screen



This is the main details screen where you can enter and edit details for each contact. The total number of records in the Contacts database is displayed on the left-hand side of the screen.

How to move around the Contacts database

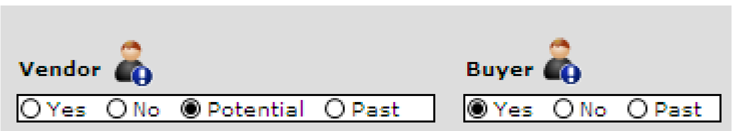
When you enter the Contacts database you will see 10 red buttons across the top of the screen:

1. **New Contact** click on this button to create a new contact (the system will prompt you to first search for duplicates).
2. **Print** allows you to print the details for the contact you are viewing, the found set or blank records showing fields.
3. **Quick Find** a handy tool to quickly search for a contact by their name, address or phone number.
4. **My Contacts** finds all contacts with your ID.
5. **My Buyers** finds any contacts with your ID and marked 'Yes' in the Buyer field.
6. **My Vendors** finds any contacts with your ID and marked 'Yes' in the Vendor field.
7. **SMS** clicking this button allows you to send an SMS to the current contact you are viewing or a bulk SMS to a group of contacts you have in the found set. You can also send an SMS by clicking the button above the Phone number (mobile).
8. **Email** clicking this button allows you to send an email to the current contact you are viewing or a bulk email to a group of contacts you have in a found set. You can also send an Email by clicking the button above the Email address field (envelope).
9. **Trails** allows you to set trails and activities against a contact.
10. **Charts** opens the Complete Data Chart Selector, where you can create a number of bar and pie charts on the found set.

How to create a new contact

1. From the **Complete Data Professional** Main Menu, click the Contacts button to open the Contacts database.
2. Click the New Contact button. A dialogue box will appear asking you to search for the name in the database. This ensures that you do not enter duplicates of contacts that are already in the system.
3. Type the surname of the person you wish to enter (e.g. 'Smith') and click OK.
4. If no matching contacts are found a new blank record will be created.
5. Enter the details for your contact.

Entering new contact details



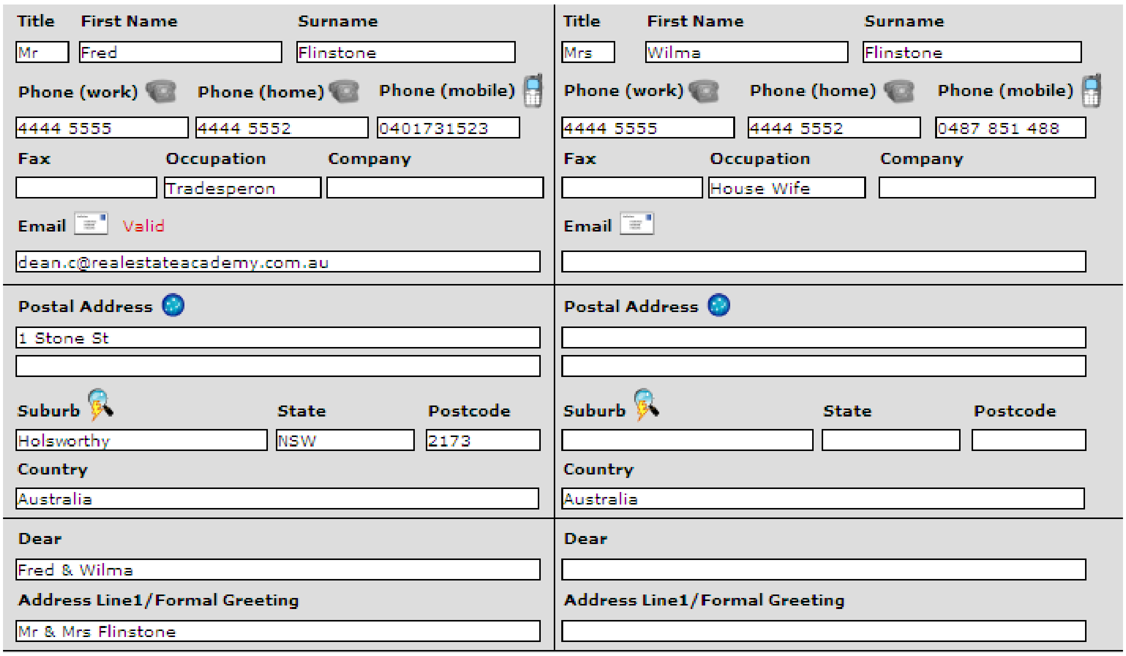
Across the top of the screen (underneath the red buttons), you will see the following fields which allow you to categorise your contacts:

- Vendor
- Buyer
- Buyer Category
- Vendor Category
- Membership.

Refer to the heading, **Categorising your Contacts** for more information about this feature.

Pressing the TAB key on your keyboard will take you from one field to the next in sequential order.
The only mandatory fields are the Customer # (ID no.) and Time of Relationship fields and these are entered automatically. You can enter data in as few or as many fields as you wish. Just remember, the more information you have on a contact, the more you will know about them for future reference.
You will notice that the screen is split in half, with the same fields on both sides. This is to allow you to enter the details of both parties if there are two parties involved (e.g. a married couple). If there is only one person, complete the left side and leave the other side blank.

Mandatory Fields


Title: Mr | First Name: Fred | Surname: Flinstone
Phone (work): 4444 5555 | Phone (home): 4444 5552 | Phone (mobile): 0401731523
Fax: | Occupation: Tradesperon | Company:
Email Valid: dean.c@realestateacademy.com.au
Postal Address: 1 Stone St
Suburb: Holsworthy | State: NSW | Postcode: 2173
Country: Australia
Dear: Fred & Wilma
Address Line1/Formal Greeting: Mr & Mrs Flinstone

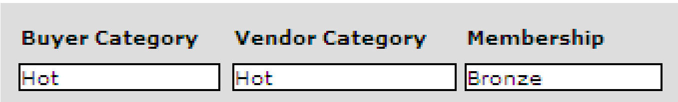
Title: Mrs | First Name: Wilma | Surname: Flinstone
Phone (work): 4444 5555 | Phone (home): 4444 5552 | Phone (mobile): 0487 851 488
Fax: | Occupation: House Wife | Company:
Email:
Postal Address:
Suburb: | State: | Postcode:
Country: Australia
Dear:
Address Line1/Formal Greeting:

Our recommendation is that you complete at least the following fields:

- **Title** (Mr, Mrs etc.)
- **First Name** and **Surname**.
- Contact Phone Numbers (if you wish to send them an SMS you will need to enter their Mobile Phone number first).
- **Occupation**.
- **Company** this is the company the client works for (if applicable).
- **Email** having the email address details for a contact will give you access to one of the best features of **Complete Data Professional**, that is the bulk email feature, which allows you to quickly and effectively communicate with a large number of contacts at once (e.g. to send all current buyers news about a new listing or price reduction.
- **Postal address**.
- **Suburb** once you have typed in there suburb, click on the magnifying glass icon and **Complete Data Professional** will access the Australia Post postcode database to find the state and postcode details for you if you do not know them.

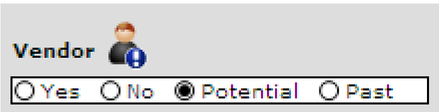
- **State** and **Postcode**.
- **Dear** salutation, i.e. how the client would like to be addressed in a letter or email (e.g. 'Lee and Mary' or 'Mr and Mrs Smith').
- **Address Line 1/Formal Greeting** the first line of the address block on a letter (e.g. 'Mr and Mrs L Smith').
- **Lead Source** to achieve accurate lead source reporting it is imperative that this field be completed for each contact. Having an understanding of your best lead sources will help you to decide how to market yourself in order to attract more clients. A lead source report is generated from the information in this field, giving you an accurate picture of where you should be concentrating your efforts.
- **Write Note and Update Note** Allows you to record general notes about the contact. To get started, simply click the Write Note button and your name, the date and time are automatically entered. Type in any additional information you wish to record about the client/s and then click the Update Note button to save the note. **Note:** You **must** save the note before navigating elsewhere in **Complete Data Professional.** You can add subsequent notes; each time you click the Update Note button to save, the most recent one will appear at the top.

Categorising your contacts



Once you have finished entering the contact details, you can classify them as either a Vendor, Buyer or both and begin entering further detailed information. You can also categorise them further by making them 'hot', 'warm' or 'cold' prospects.
Go back to the top of the Contacts screen.

Vendor



1. **Yes** - currently selling a property with you or your company.
2. **No** - the client has taken the property off the market or has listed it with another agent.
3. **Potential** - a client who has expressed interest in selling or for whom you have done an appraisal.
4. **Past** - a previous client for whom you have sold property and with whom you wish to stay in contact.

Note: If you wish to delete your selection, click the Backspace key on your keyboard twice. If you would like to select more than one of these options select the first options and then hold your shift key down to select the 2nd option.
If you selected 'Yes', you will require further information about the property the client is selling. To do this, click on the person icon and you will be taken to a screen which looks like this:

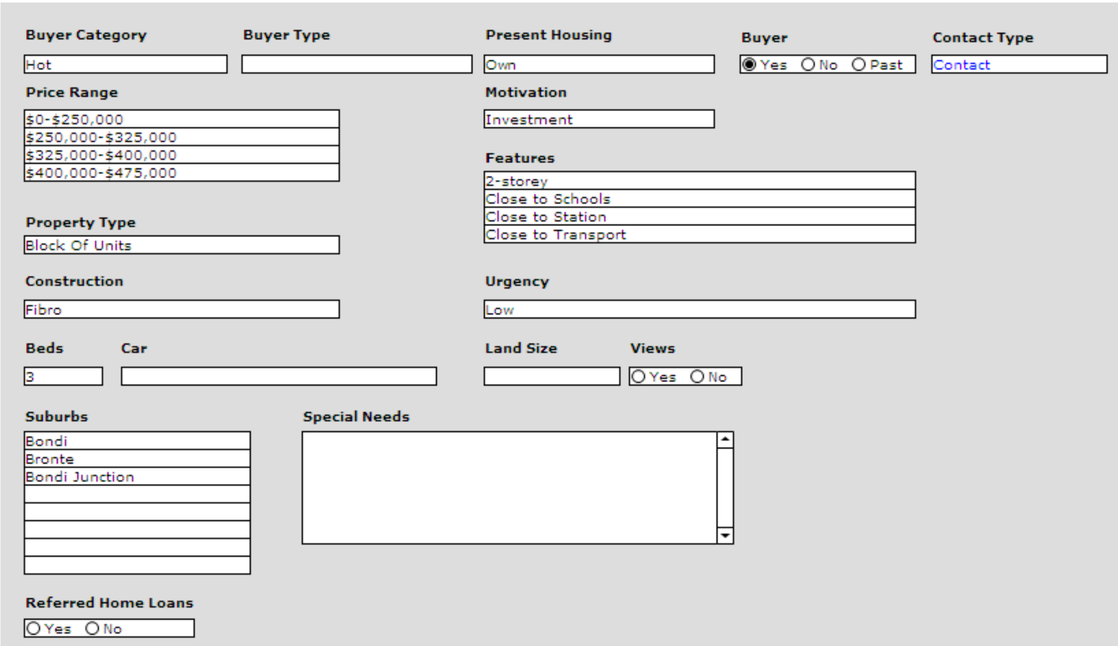
Buyer

There are three categories for Buyers:

1. **Yes** - currently in the market to buy a property.
2. **No** - a client who is no longer looking for a property to purchase or brought off one of your competitors.
3. **Past** - a client who has purchased a property from you or your company and with whom you wish to stay in contact.

Note: If you wish to delete your selection, click the Backspace key on your keyboard twice. If you would like to select more than one of these options select the first options and then hold your shift key down to select the 2nd option.
If you selected 'Yes', you will want more information about your client, i.e. what type of property is the client looking for and in what price range? To enter this information, simply click on the person icon and you will be taken to the Buyer Requirements screen.

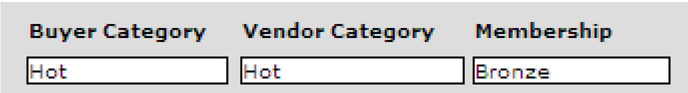
Buyer Details



Fill in as much information as you can about the client's needs, remembering that every drop-down list can be edited to suit your needs.
When selecting a buyer's price range, it is important to include a range of numbers. So if your client were looking to purchase a property between $400,000 and $500,000 you would select the following ranges:
$325,000 - $400,000
$400,000 - $475,000
$475,000 - $550,000
The Special Needs field can be very important, for instance you may have a client who requires wheelchair access. It would be highly unprofessional to leave this important detail out and then show the client homes that do not have this vital requirement.
The red History button at the top of the screen shows a list of any properties the buyer has purchased in the past. When you enter the Sales Advice details you will be linking a buyer to that listing which then results in those properties appearing on this list.

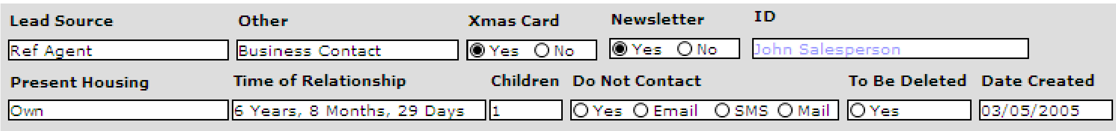
Once you have completed the Buyer Requirements screen, click the red Details button to return to the main Contact details screen.
Often your client will be both a vendor and a buyer at the same time, and so you would select the appropriate option in both categories.

Categorising your clients as 'Hot', 'Warm' or 'Cold' prospects



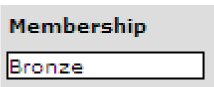
Buyers and vendors may be categorised as 'Hot', 'Warm' or 'Cold' by selecting the appropriate option from the drop-down list in the Buyer Category and Vendor Category fields.
Note: Should you prefer to change this terminology, select the Edit button and type in your preferred category terms (a separate line for each).

What about a client who is neither a vendor nor a buyer?



Your clients may include landlords, tenants and other business contacts and these cannot be classified as a vendor or a buyer. For this purpose, an 'Other' field has been included at the bottom of the screen. You can edit the options provided in the drop-down list by selecting the Edit button and typing in your preferred client categories (a separate line for each).

The Membership category



The Membership field allows you to categorise your contacts as one of the following:

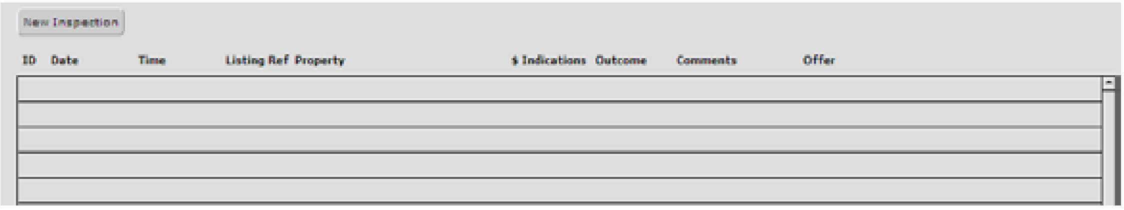
- **Prospect** - someone in your database with whom you have not yet had contact.
- **Bronze** - someone thinking of buying or selling.
- **Silver** - someone who has purchased a property from the company.
- **Gold** - someone who has paid commission to your company, which would be a past vendor or landlord.

Once again you can edit the list by clicking the Edit option at the bottom of the list and entering your own choices on separate lines.

Buyer Inspections

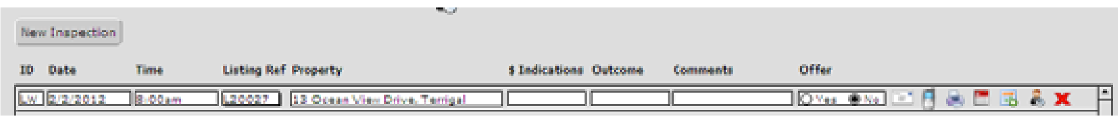
One of the great features of **Complete Data Professional** is that it is easy to track buyer inspections and print a report for the vendor showing the inspections history and feedback on their property.

To record a property inspection for a buyer:



1. Go to the **Complete Data Professional** Main Menu.
2. Click the Contacts button.
3. Click the Find button, enter the criteria you wish to search for to locate the buyer (e.g. John Smith) and press Enter on the keyboard to perform the Find or click the grey find button on the left of the screen to finalise your find.
4. Click the Inspections button. Any previous inspections recorded for this contact will be displayed here.
5. To record a new inspection against this contact click the New Inspection button, which will create a blank Inspection Slip.

Filling in the Inspection fields



Complete the following fields:

1. **ID** - select the initials of the agent showing the property.
2. **Date** - select the inspection date using the pop-up calendar.
3. **Time** - select the inspection time from the drop-down list.
4. **Listing Ref** - select the property from the drop-down list. This list shows all properties with a status of 'Listed'.
5. **Property** - this field is entered automatically when you select a Listing Ref.
6. **$ Indications** - enter what the buyer thought the property was worth.
7. **Outcome** - select an outcome from the drop-down list, or you can edit this list by clicking on edit and adding in a different outcome.
8. **Comments** - enter any additional comments here.
9. **Offer** - select 'Yes' if the buyer made an offer on the property (default is 'No'). If they buyer did make an offer on the property, make sure the Indications field is the amount they offered.

You can also provide instant feedback to the listing agent (if not yourself) and the vendor via email or SMS from this screen. Clicking the Email button gives you the option of emailing the vendor or the listing agent the inspection slip details. Clicking the SMS button will SMS the inspection slip details to the vendor. Finally you can click the Printer icon to print a letter of offer to the vendor.

Corresponding with your Contacts

Sending Letters

Success in real estate is all about customer contact. At Complete Data we realise that maintaining regular contact with all of your clients can be extremely time consuming. **Complete Data Professional** allows you to easily target your clients with useful information through letters, emails and SMS's. To minimise the amount of time that you spend composing your correspondence, **Complete Data Professional** comes with 58 sample letters, 21 templates for SMS's and emails and 16 standard trails. You have already learnt how to customise these in order to make them your own (refer to Chapter 4 Customising your System).

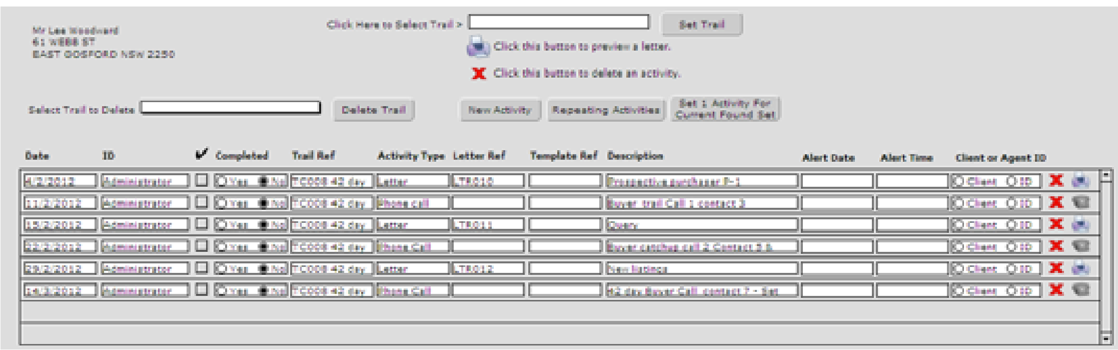
This chapter focuses on how to use the system to correspond with your clients professionally, regularly and efficiently.

Every **Complete Data Professional** mail merge letter is a Microsoft Word document (**Note:** Microsoft Word is **not** included with **Complete Data Professional**). The letters will work with any version of Microsoft Word 2000 or later (this includes Word 2000, Word XP, Word 2003, Word 2007 and Windows Vista). You will recall, from Chapter 4.1 of this guide Customising your mail merge letters, that the supplied Microsoft Word mail merge templates are divided into the following categories:

- **Anniversary** - these letters are available in the Contacts database when setting a trail/activity.
- **Buyer or Prospect** - these letters are available in the Contacts database when setting a trail/activity.
- **Listing** - these letters are available in the Listings database when setting a trail/activity.
- **Listing Confirmation** - these letters are available in the Appraisals database when printing a confirmation letter.
- **Service Area** - these letters are available in the Service Area database when setting a trail/activity.

Complete Data Professional allows you to send a letter to a single contact or to a group of contacts.

How to send a letter to a single contact

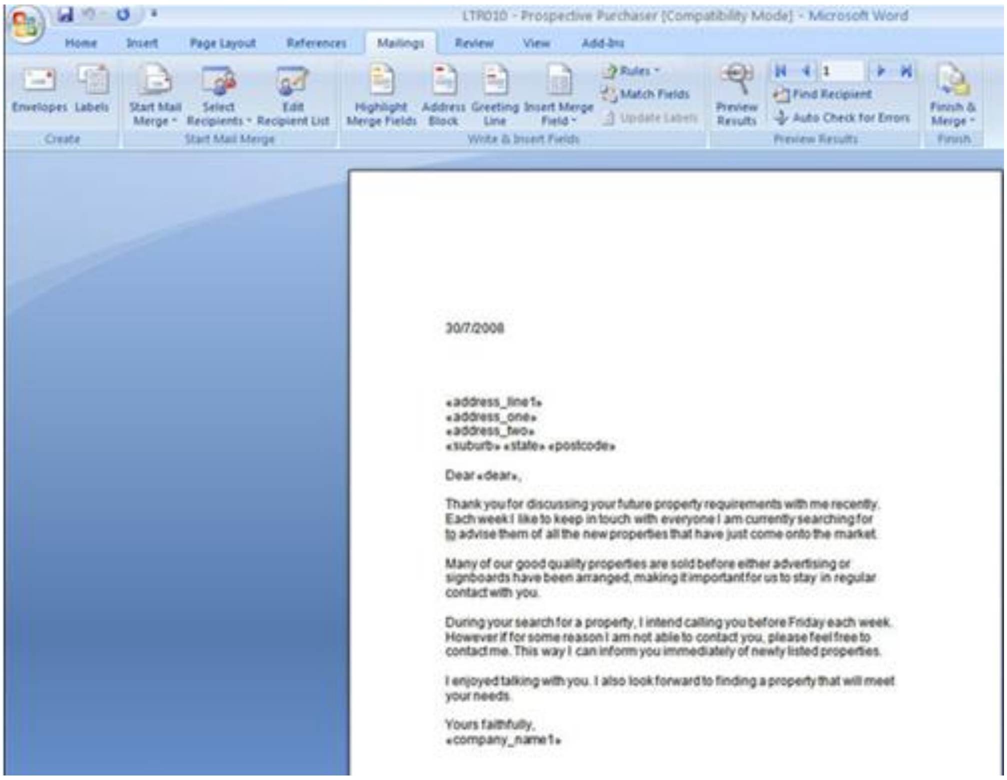


To send a letter to a single contact:

1. Go to the **Complete Data Professional** Main Menu.
2. Click the Contacts button.

3. Click the Find button and enter the criteria you wish to search for (eg. John Smith, who is a buyer) then press Enter on the keyboard to perform the Find.
4. Once you have found the contact you wish to send a letter to, click the Trails button. This screen will show any activities that have been previously set against this contact.

Mailings Tab



1. Click the New Activity button and select the Date (today's date if you are printing the letter now) and the ID of the person who will be printing this letter.
2. Select 'Letter' for the Activity Type. You can then select from the list of letters in the Letter Ref column (this shows any Letters whose Letter Type = 'Buyer or Prospect').
3. To print or preview the letter click the Printer button to the right of the Description field. The selected Microsoft Letter will open. (**Note:** If you have Microsoft Word 2003 installed you will get a message to which you simply need to select 'Yes').
4. You will now be viewing the Microsoft Word mail merge letter:

At this point you can preview how the letter will look when merged, merge the letter to a printer or merge it to a new document if you wish to save it. You will need to have your Mail Merge toolbar turned on first if it's not already displaying (if you cannot see the Mail Merge toolbar, go to the View menu and select Toolbars and make sure the Mail Merge option is ticked).
Below is an explanation of the most commonly used buttons on the Mail Merge toolbar:

- **View Merged Data / Preview Results** - lets you preview how the merged letter looks by swapping the view from the merged fields to the actual data in the merged fields. Clicking this button switches back and forth between the two different views. **Note:** If you are merging to more than one contact, clicking the left and right arrow buttons will show you the merged document with the different names and addresses.

- **Insert Merge Fields** - lets you insert merge fields into the document. You must first click the cursor in the position you wish the merge field to appear and then select the required merge field from the drop-down list.

- **Merge to Printer** - will merge the document with the data source and send it straight to the printer. If you only need to print the merged document and not save a copy, use this button. For information on the other buttons on the Mail Merge toolbar please consult your Microsoft Word manual or online help.

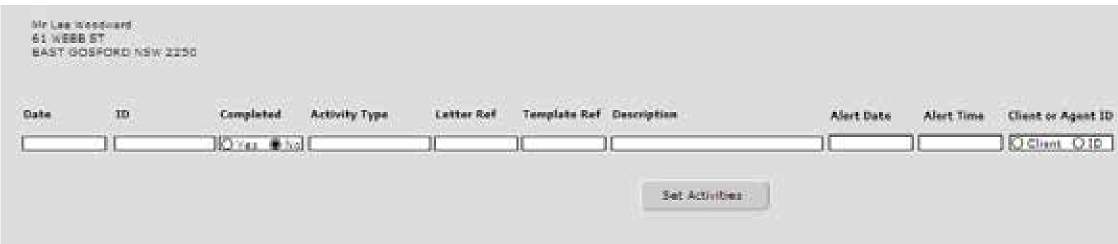
When you are finished, close the Microsoft Word document and return to **Complete Data Professional**.
Note When closing down the Microsoft letter do not save unless you make changes to the letter and you would like to save the master letter. If you would like to save the changes to the letter make sure the letter is showing the merge fields not the data. If you would like to save the letter with the contact data please select File>Save as and this will save a copy without changing the master letter.

How to mail merge a letter to a group of contacts

There are times when you will want to send the same letter to a number of contacts, for example to advise a number of buyers of the details of an upcoming open for inspection.

1. Go to the **Complete Data Professional** Main Menu.
2. Click the Contacts button.
3. Click the Find button and enter the criteria you wish to search for (e.g. All contacts with 'Yes' in the Buyer field) then press Enter on the keyboard to perform the Find. The status area on the left of the screen will change to reflect the found set of contacts.
4. Click the Trails button.
5. Click the Set 1 Activity for Current Found Set button. Fill in the details for the letter you wish to send to all found contacts.

Create Bulk Activities

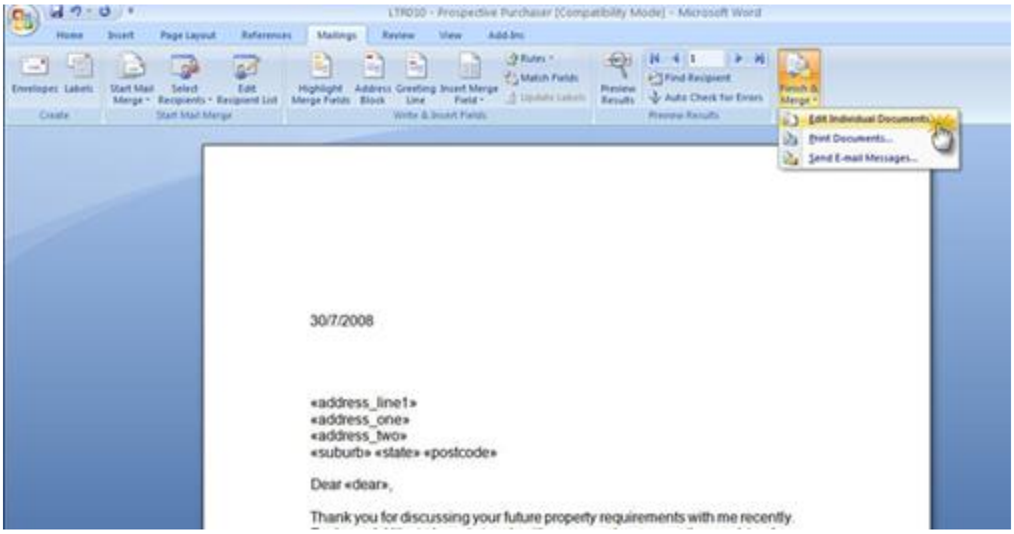


- **Date** - select today's date.
- **ID** - select your name from the drop-down list.
- **Completed** - select Yes as you will be printing the letter straight away.
- **Activity Type** - select Letter from the drop-down list.

- **Letter Ref** - select the required letter from the drop-down list.
- **Description** - enter a description for this mail out (e.g. New Listings Mail Out).

6. Click the Set Activities button. **Complete Data Professional** will generate the same activity for each contact that you have found and then open the letter in Microsoft Word. You can make any last minute changes to the text of the letter before merging. Once you are happy with the letter, click the Merge to New Document button on the Mail Merge toolbar or Mailings> Finish & Merge> Edit Individual Documents.

Microssoft Word



Microsoft Word will now create a new document with a page break between each contact. For example if you had found 30 contacts you will have one document with 30 letters, with a page break between each letter.

7. You can now print all the letters off in one go.

Avery Labels

Complete Data Professional also has the ability to print mailing labels for one contact or a group of contacts. We recommend the use of the Avery brand of labels as **Complete Data Professional** has support for the following Avery labels which are available at most stationery suppliers:

- Avery L7159
- Avery L7160
- Avery L7161
- Avery L7162
- Avery L7163

To print Avery labels for one or more contacts:

1. Go to the **Complete Data Professional** Main Menu.
2. Click the Contacts button.
3. Click the Find button, enter the criteria you wish to search for (e.g. all contacts with 'Yes' in the Buyer field) and press Enter on the keyboard to perform the Find. The status area on the left of the screen will change to reflect the found set of contacts.
4. Click on the Scripts menu at the top of the screen and you will see a list of the supported Avery labels.
5. Select the required Avery labels - **Complete Data Professional** will then display a preview of the labels. To view the next page, click the right page of the Book icon in the top left-hand corner:

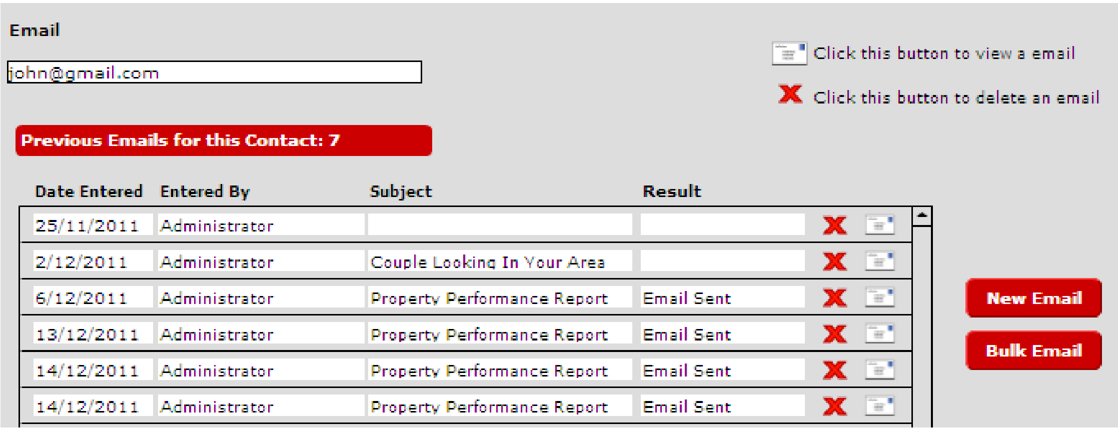
6. Click the Print or Continue button to proceed with printing and select your Print Setup and Print options as appropriate.

Note: Make sure you select 'Records being browsed' in the Print dialogue box to ensure you get labels for all the found set of contacts, not just the contact you were viewing.

Emails

The majority of people these days have access to a computer, either at home, at work or both and the vast majority would also have their own email address. As a result, emailing has become a common means of communication.
As is the case with letters, **Complete Data Professional** has the functionality to send an email to an individual contact, or a bulk email to a group of contacts (e.g. to all buyers looking for a unit in a particular suburb). When you enter an email address for a contact **Complete Data Professional** verifies it to ensure that it has been entered correctly. If the email address has been entered correctly, you will see the word 'valid' next to the address. Otherwise it will display 'invalid' to alert you to potential problems with the email address (such as a syntax error) and give you the opportunity to fix it.

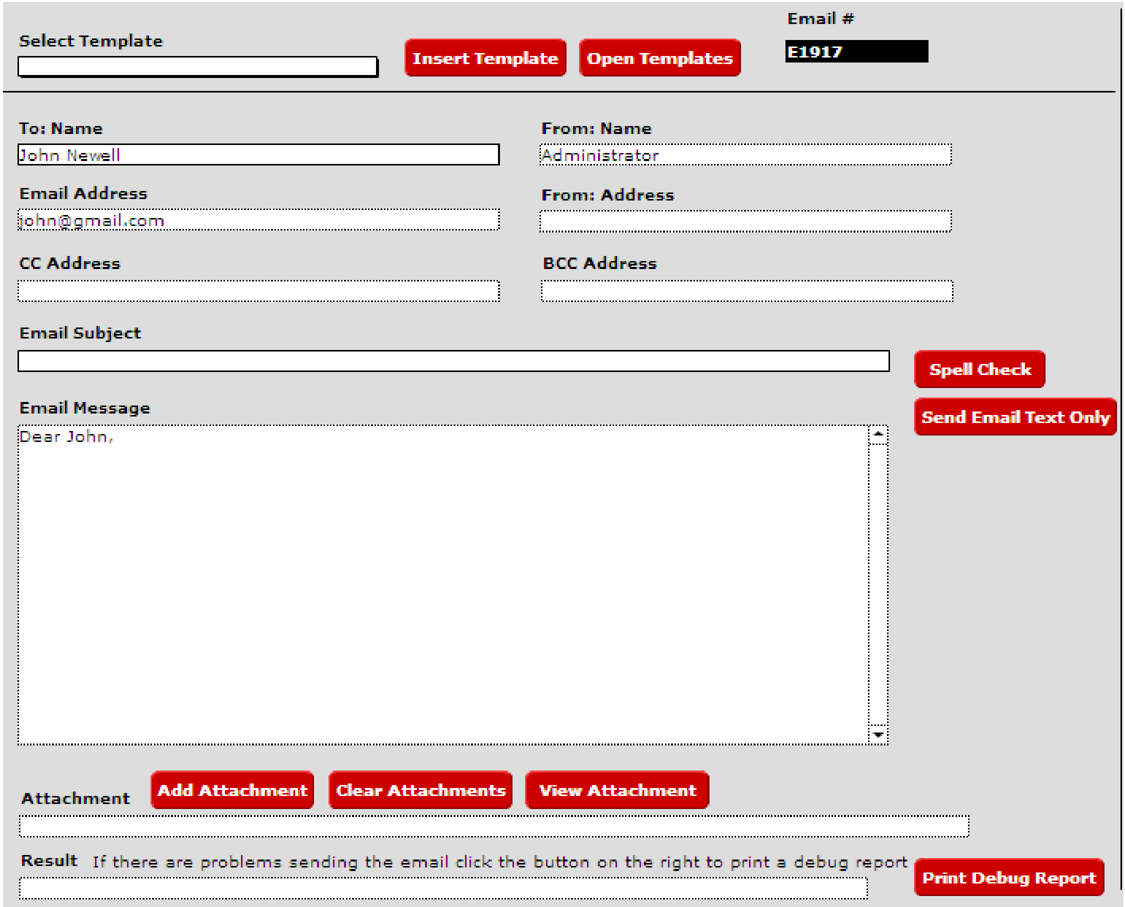
How to send an email to a single contact



1. Go to the **Complete Data Professional** Main Menu.
2. Click the Contacts button and select the icon to the left of the contact to whom you wish to send the email (you may need to search for the contact if they are not in the list you are currently viewing).
3. Click the red Email button at the top of the screen or click on the email icon above the Email field on the Contacts screen.

If you have previously sent any email messages to this contact they will be displayed

1. To create a new email to the current contact, click the red New Email button. A dialogue box will appear on the screen asking you to select either a TEXT or HTML email. Select TEXT if you are going to be typing the message (just like you would when sending an email using Microsoft Outlook). If you have had a newsletter or brochure designed as an HTML file, you would select HTML. HTML emails allow you to send a HTML file as the body of the message - you do not type any message, rather you select the HTML file. In most cases you will be selecting TEXT.



1. You will be taken to the Email Composition screen where you can enter the subject and text of the email:

- **To** - the name of the contact to whom you are sending the email, which will automatically be inserted from the contacts screen.
- **Email Address** - the email address of the contact , which will automatically be inserted from the contacts screen.
- **From Name** - **Complete Data Professional** automatically enters the current user's name when creating a new email message.
- **From Address** - **Complete Data Professional** uses the email address entered in the My Settings screen for each user of the system. Any replies to this email will be sent to this address. If the email address is incorrect, you can correct these details by returning to the Main Menu and selecting My Settings to make the change.

Note: Complete Data Professional does not receive email messages so you will need to use your regular email client, e.g. Microsoft Outlook, for all email replies.

- **CC Address** - the address of any party you wish to send a copy of this email to. You can enter multiple addresses by pressing the Enter key so each address is on a separate line.
- **BCC Address** - the address of any party you wish to send a blind carbon copy of this email to. You can enter multiple addresses by pressing the Enter key so each address is on a separate line.
- **Email Subject** - the subject of the email.

- **Email Message -** the message text.
- **Attachment** - any attachments you are going to include with this email message are listed here. If you wish to add an attachment to the email, click the Add Attachment button and select the document/file you wish to send (e.g. a newsletter or brochure). You can repeat this process to select multiple attachments.
- **Result** - displays the result after you send the email (e.g. Email Sent Successfully).

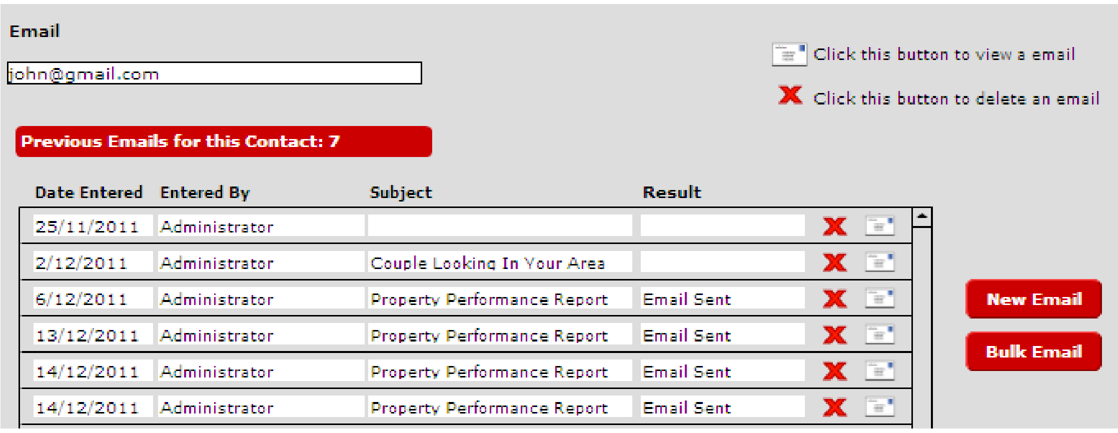
6. When you have finished composing your message and included any attachments, you can conduct a spell check by clicking the Spell Check button.
7. Send the email by clicking the Send Email Text Only button.
Important - Please do not use **Complete Data Professional** while it is attempting to send an email. Depending on the speed of your Internet connection, the size of any attachments and the responsiveness of your SMTP Mail Server, the message can take up to 60 seconds to send. Wait until the Result field is updated before trying to continue using the system.
When you have finished sending your email, click the Contacts button to return to the Contacts screen. To view any email messages that have previously been sent, click the button to the right of the email in the list.
Should you need to delete an email, click the red X button to the right of the message.

Emails HTML

The majority of people these days have access to a computer, either at home, at work or both and the vast majority would also have their own email address. As a result, emailing has become a common means of communication.

As is the case with letters, **Complete Data Professional** has the functionality to send an email to an individual contact, or a bulk email to a group of contacts (e.g. to all buyers looking for a unit in a particular suburb). When you enter an email address for a contact **Complete Data Professional** verifies it to ensure that it has been entered correctly. If the email address has been entered correctly, you will see the word 'valid' next to the address. Otherwise it will display 'invalid' to alert you to potential problems with the email address (such as a syntax error) and give you the opportunity to fix it.

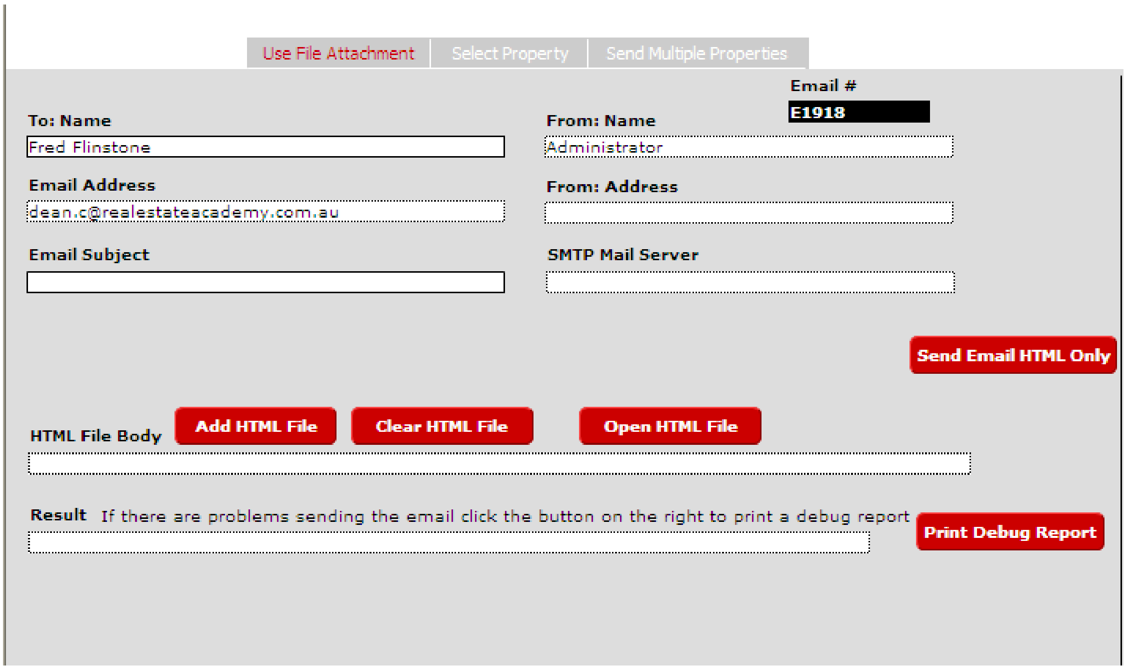
How to send an html email to a single contact



1. Go to the **Complete Data Professional** Main Menu.
2. Click the Contacts button and select the icon to the left of the contact to whom you wish to send the email (you may need to search for the contact if they are not in the list you are currently viewing).
3. Click the red Email button at the top of the screen or click on the email icon above the Email field on the Contacts screen.

If you have previously sent any email messages to this contact they will be displayed

1. To create a new email to the current contact, click the red New Email button. A dialogue box will appear on the screen asking you to select either a TEXT or HTML email. Select HTML if you are going to be typing the message (just like you would when sending an email using Microsoft Outlook).



1. You will be taken to the Email Composition screen where you can enter the subject and text of the email:

- **To** - the name of the contact to whom you are sending the email, which will automatically be inserted from the contacts screen.
- **Email Address** - the email address of the contact , which will automatically be inserted from the contacts screen.
- **From Name** - **Complete Data Professional** automatically enters the current user's name when creating a new email message.
- **From Address** - **Complete Data Professional** uses the email address entered in the My Settings screen for each user of the system. Any replies to this email will be sent to this address. If the email address is incorrect, you can correct these details by returning to the Main Menu and selecting My Settings to make the change.

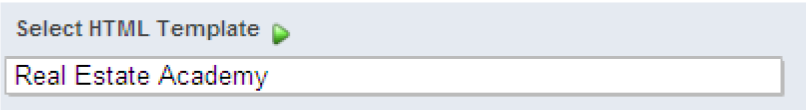
Note: Complete Data Professional does not receive email messages so you will need to use your regular email client, e.g. Microsoft Outlook, for all email replies.

- **CC Address** - the address of any party you wish to send a copy of this email to. You can enter multiple addresses by pressing the Enter key so each address is on a separate line.
- **BCC Address** - the address of any party you wish to send a blind carbon copy of this email to. You can enter multiple addresses by pressing the Enter key so each address is on a separate line.
- **Email Subject** - the subject of the email.
- **Email Message -** the message text.
- **Add html File**- any attachments you are going to include with this email message are listed here. If you wish to add an attachment to the email, click the Add Attachment button and select the document/file you wish to send (e.g. a newsletter or brochure).
- **Result** - displays the result after you send the email (e.g. Email Sent Successfully).

6. When you have finished composing your message and included any attachments, you can conduct a spell check by clicking the Spell Check button.
7. Send the email by clicking the Send Email Text Only button.
Important - Please do not use **Complete Data Professional** while it is attempting to send an email. Depending on the speed of your Internet connection, the size of any attachments and the responsiveness of your SMTP Mail Server, the message can take up to 60 seconds to send. Wait until the Result field is updated before trying to continue using the system.
When you have finished sending your email, click the Contacts button to return to the Contacts screen. To view any email messages that have previously been sent, click the button to the right of the email in the list.
Should you need to delete an email, click the red X button to the right of the message.

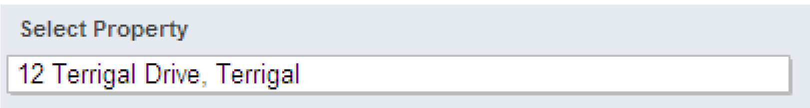
If you would like to use a template you have in Complete Data click on **select property** or **select multiple properties**

Select a html template



You must select a html template before you select the property.

Select your property

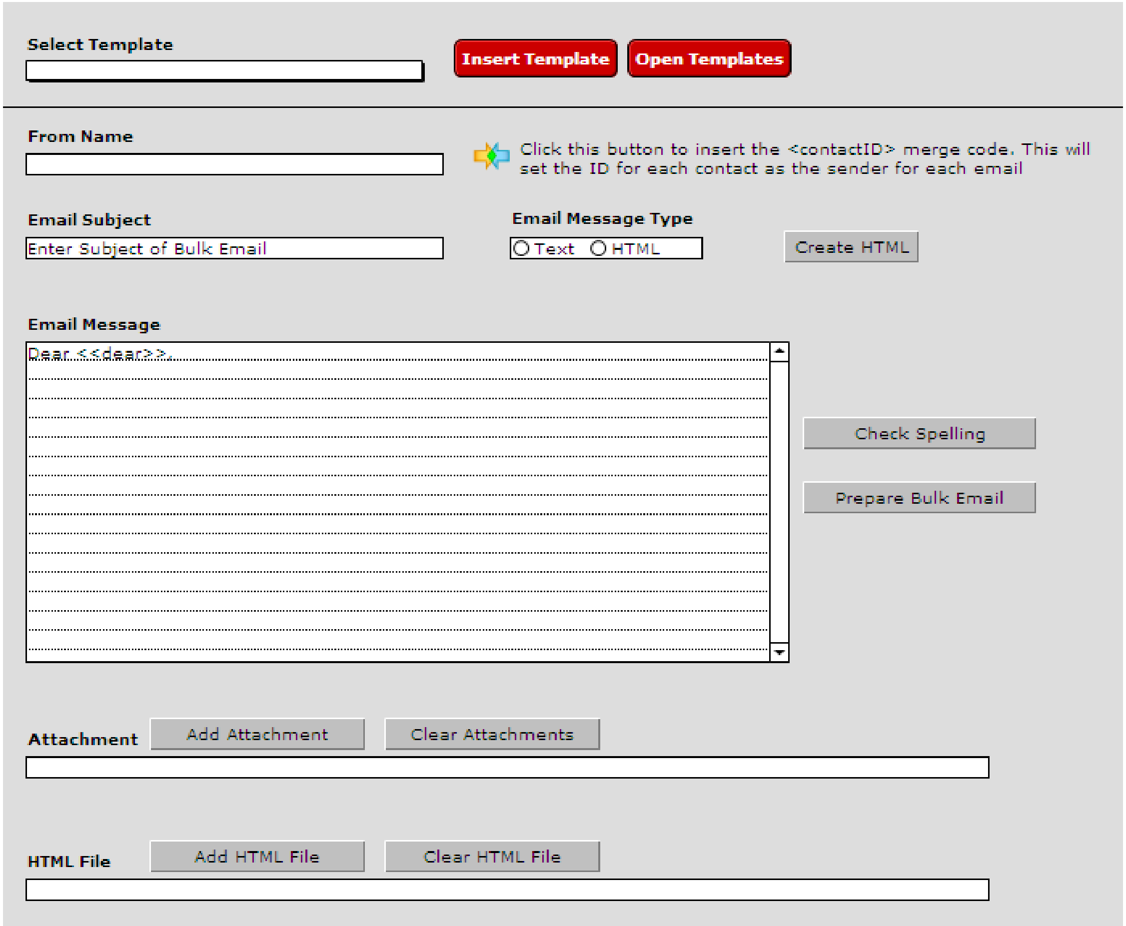


Once you select you property you will be able to preview the property on the right handside. Click send once you are ready to send this email to your client.

Bulk Email Messages

Complete Data Professional has the ability to find a group of contacts (e.g. all buyers) and send each one of them the same email. When sending bulk emails from the system, each contact will receive their own (personalised if required) email message - it will appear to them as though they are the only recipient of the email.

To Send A Bulk Email:



1. Go to the **Complete Data Professional** Main Menu.
2. Click the Contacts button.

Click the Find button and enter the criteria you wish to search for (e.g. All Contacts with 'Yes' in the Buyer field), then press Enter on the keyboard to perform the Find. The status area on the left of the screen will change to reflect the found set of contacts. Of the contacts found, only those with a valid email address, will be included when sending the bulk email.

1. Click the red Email button at the top of the screen and then select the Bulk Email button which displays the following screen:

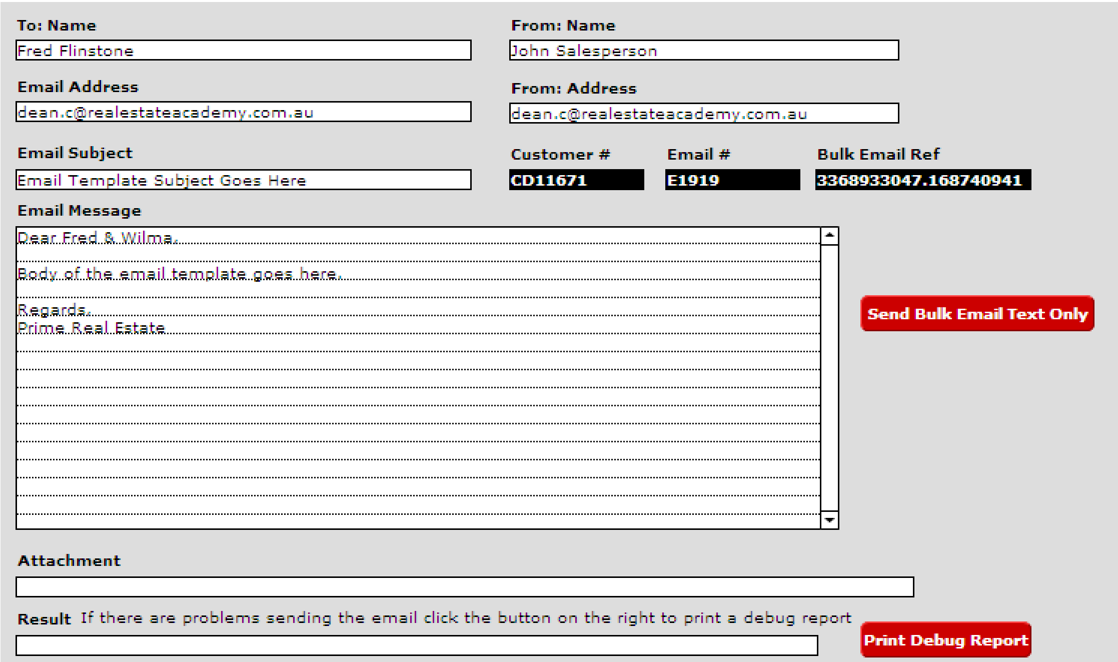
This is where you enter the email subject, message and select any attachments that will be used for the bulk email. You only need to enter these details once. By default the message appears automatically with:

Dear <<dear>>,

You can remove this if you do not want the bulk email to be personalised.

1. You have the choice to send the email message as text or HTML in the Email Message Type field. As previously discussed, in most cases you will select TEXT, as you will be typing the message (or selecting from a template see the instructions for how to send an email using a template). You can spell check the message by clicking the Check Spelling button.
2. Once you are ready to create the email (e.g. 60 emails for 60 found contacts) click the Prepare Bulk Email button - clicking this button **does not send the email**. It creates the email messages to be sent. Once you have clicked this button you will be taken to the Email database where you send the email messages, as follows:

To Send The Email



1. To send the email messages click the Send Bulk Email Text Only button. Depending on how many email messages you are sending, the size of any attachments and the speed of your Internet connection, this process can take from several minutes to several hours. If you expect the bulk email to take an extended amount of time, it is recommended to do the bulk email during lunch or as you are leaving the office.

Remember, you must not use **Complete Data Professional** while it is sending email messages. Once the bulk email has been sent to all recipients, click the Contacts button to return to the Contacts database.

How to send an email using a template

As discussed earlier in this guide, **Complete Data Professional** comes standard with a number of templates that you can use as they are or customise to make them your own. You can also create your own templates if you wish. You would have done this when customising your system.

You can use a template when sending a one-off email to a single contact or a bulk email to a group of contacts.

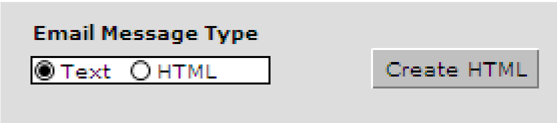
To insert a template, simply follow the same steps for sending an email, except when you add the message text, perform the following additional steps:

1. In the top left-hand part of the screen, you will see a drop-down list labelled 'Select Template'. When you click in this field you will get a drop-down list of all Email Templates (i.e. all templates from the Templates database whose Template Type = 'Email').
2. Select a template from the list and click the Insert Template button.

The text from your selected template will appear in the Email Message field as if you had typed it in manually. Any merge fields will be substituted for the appropriate data from **Complete Data Professional** for that contact (for a bulk email, the merge fields will be substituted later).

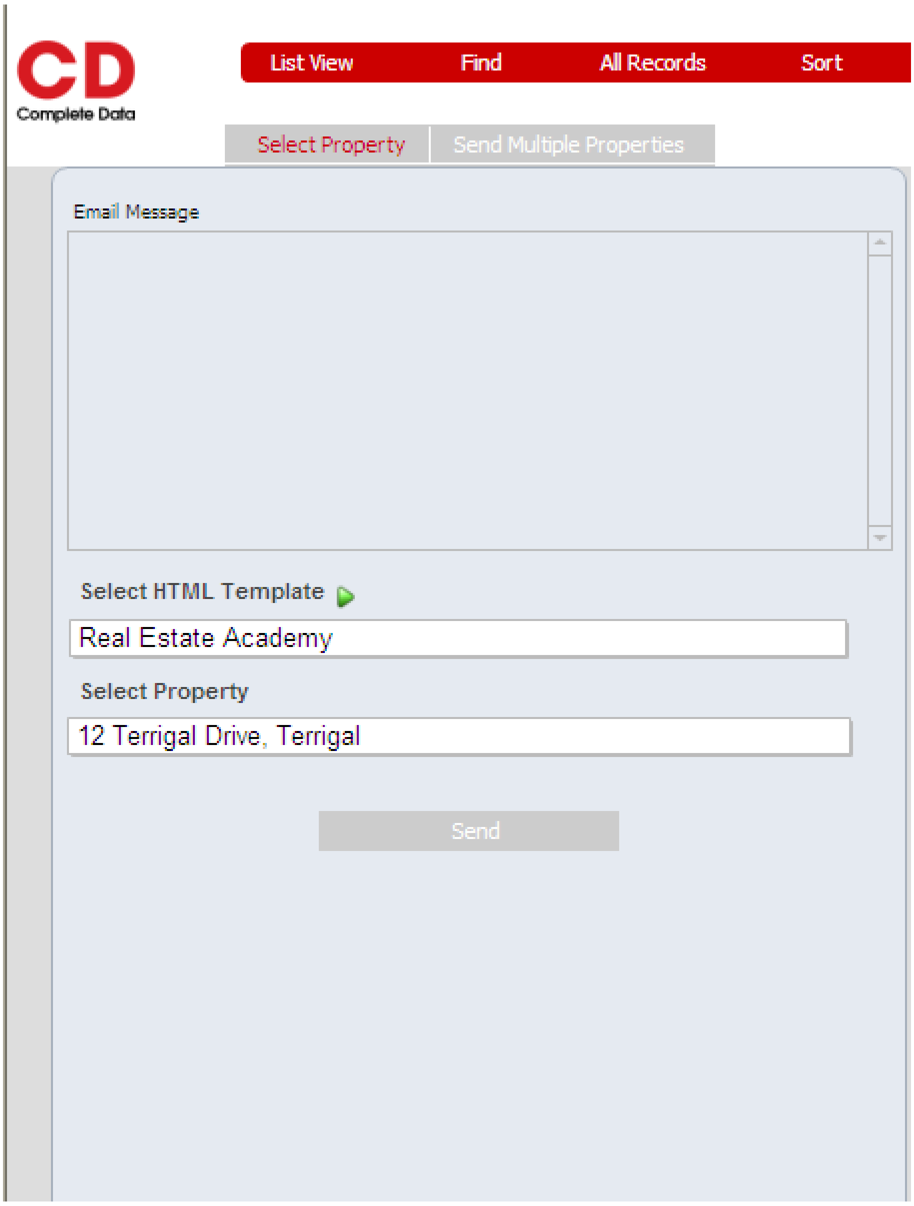
1. Make any required changes and then click the Send Email Text Only button to send your email to that contact (for a bulk email, you would select the Prepare Bulk Email button).

How to send an email using a html template



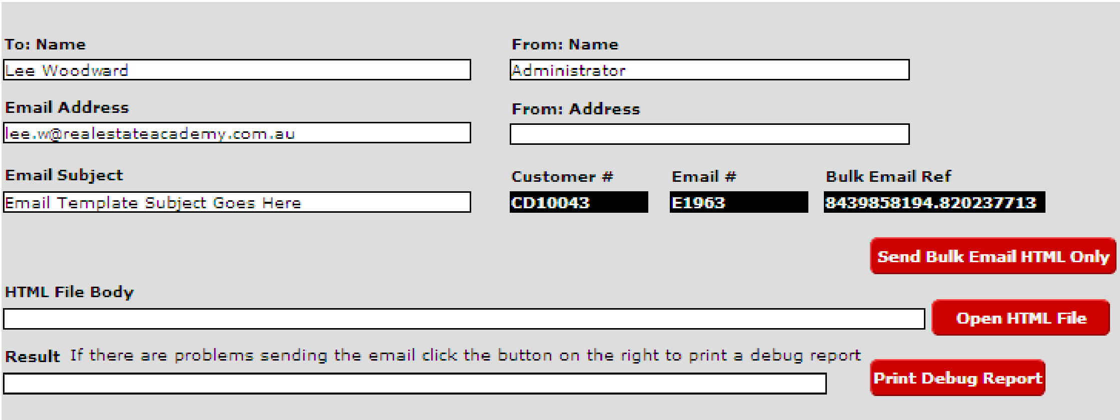
From the bulk email screen select email message type as html and press Create HTML

html template screen



1. Select the html template
2. Select the property you would like to send to the current found set.
3. Once you are happy with the preview on the right handside press **send** (this will group all of your found records and set the html against them you can now press send on the bulk html screen to complete the send)

send bulk html



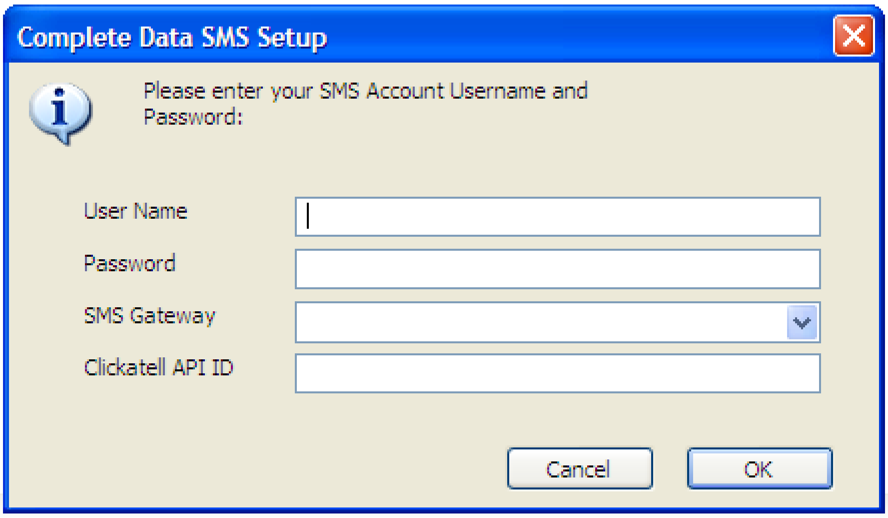
If you are happy with the email you have created with your found set press **send bulk email html only**.

Sending SMS's

Most agents find the most powerful feature of Complete Data is the SMS function. As is the case with computers and the popularity of emailing, most people nowadays also have a mobile phone and so communicating via SMS is also very popular. It is a quick and easy way to get a message across or to simply stay in touch.

Complete Data Professional comes with twelve SMS templates for common SMS messages used within the real estate industry. You can send messages directly to any mobile phone capable of receiving SMS messages within Australia/New Zealand. For example, you might like to use the SMS feature to send buyers details of new listings, open house times and auction schedules.

Establishing your system to be able to send SMS's



Firstly you need to have a live Internet connection and an account with one of the following sms providers

Clickatell
Exposure Direct
MessageNet - https://www.messagenet.com.au/completedata
Mobile Messenger - The company we use
Net24 Limited
SMS Factory
smsbroadcast.com.au

Once you have selected a provider and received a username and password, you need to enter them into **Complete Data Professional** as follows:

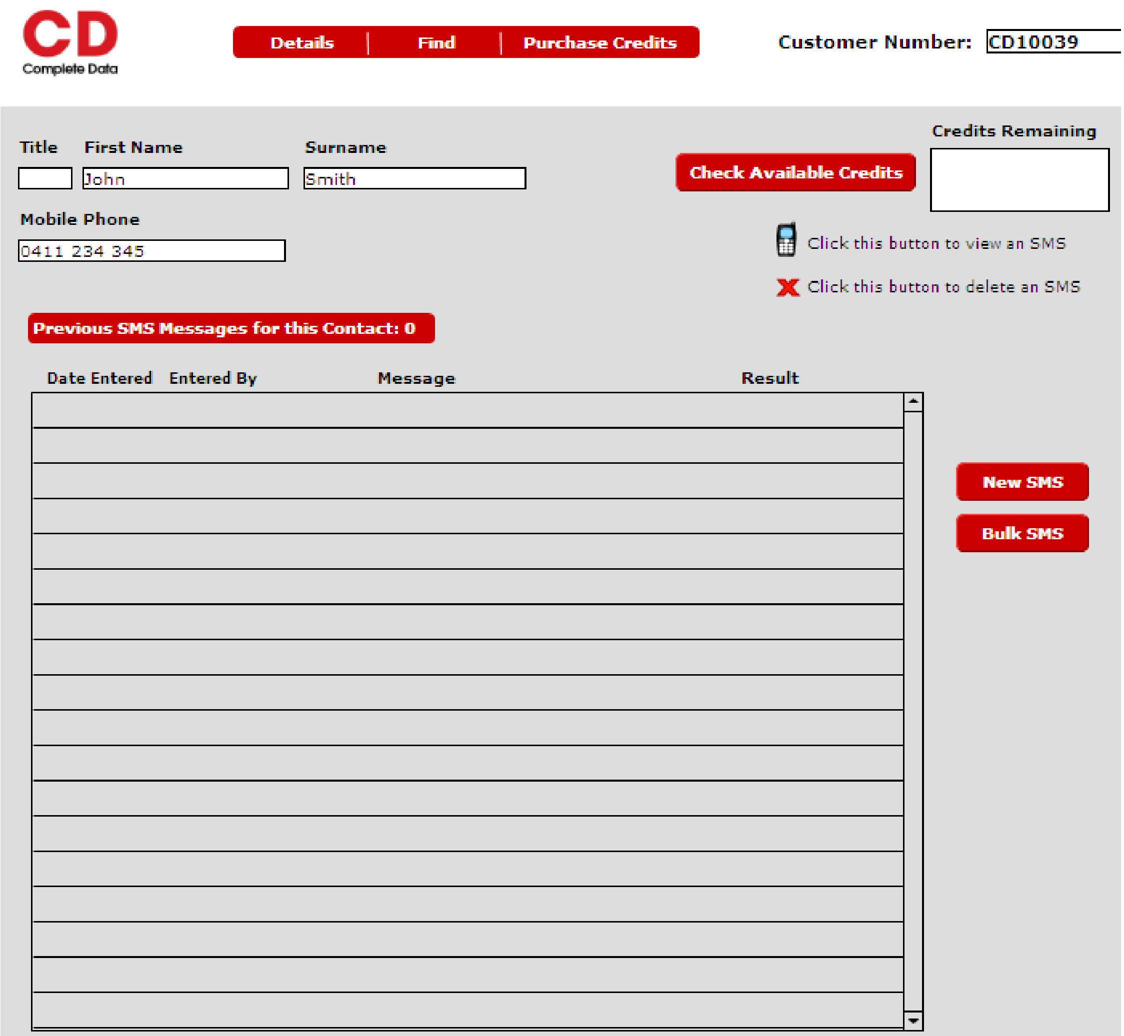
1. Go to the **Complete Data Professional** Main Menu.
2. Go to the Scripts menu at the top of the screen and select 'Enter SMS Username and Password'.
3. Enter or copy/paste the Mobile Messenger Username and Password and click OK.

You are now ready to start sending SMS messages from **Complete Data Professional**!

Sending an SMS

Complete Data Professional can send an SMS to one contact or a bulk SMS to a group of contacts (e.g. to all buyers looking for a unit in a particular suburb).
The system uses the mobile phone number entered for the left-hand side buyer in the Contacts screen as the number to send the SMS to.
The mobile phone number must be exactly 10 digits (e.g. 0412 345 678) otherwise the SMS will not be sent.

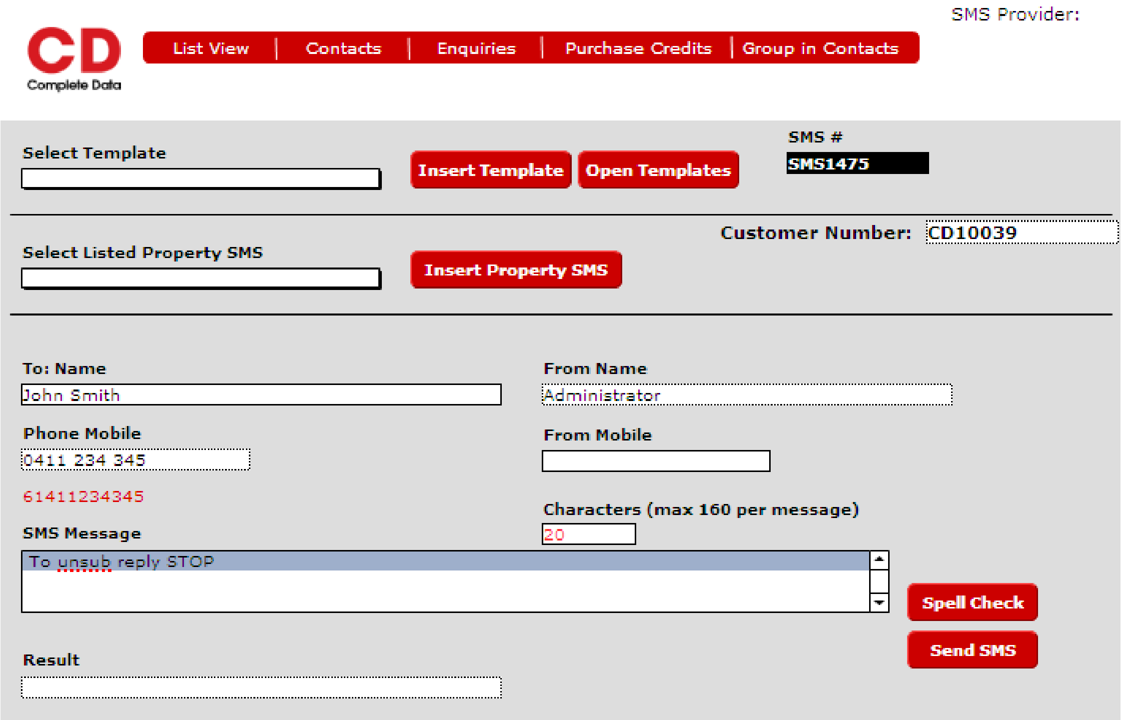
How to send an SMS to a single contact



1. Go to the **Complete Data Professional** Main Menu.
2. Click the Contacts button and click the icon to the left of the contact that you wish to send the SMS to (you may need to search for the contact you wish to SMS if they are not in the list you are currently viewing).
3. Click the red SMS button at the top of the screen or click on the mobile phone.

If you have previously sent any SMS's to this contact, they will be displayed.

SMS screen



1. To create a new SMS to the current contact click the red New SMS button, which takes you to the SMS composition screen containing a number of fields:

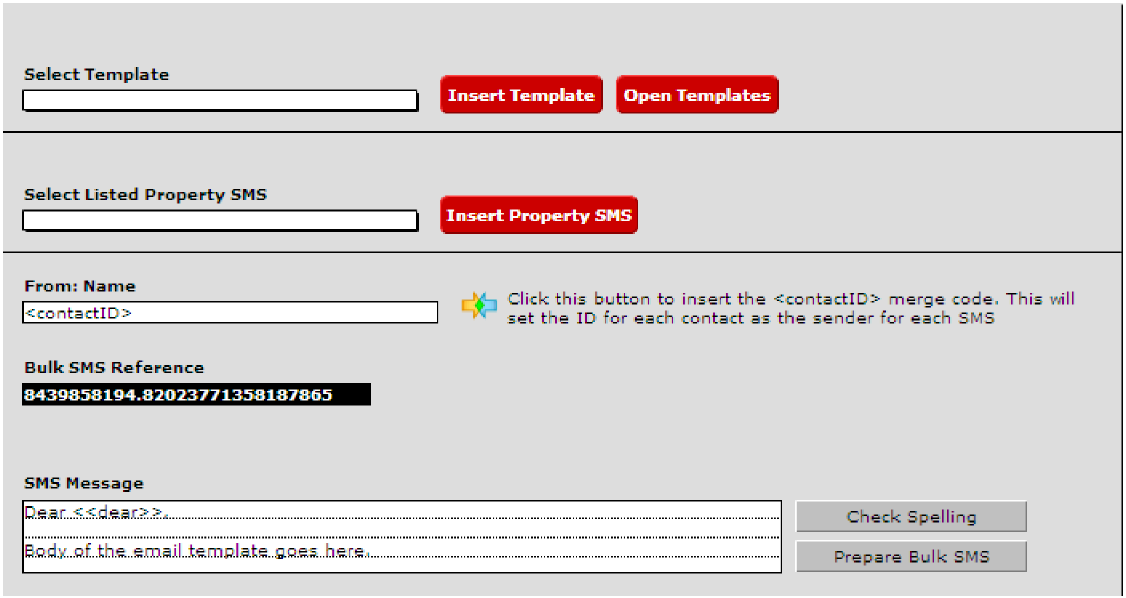
- **To** - the name of the contact to whom you are sending the SMS, which will automatically be inserted from the contacts screen.
- **From Name** - **Complete Data Professional** automatically enters the current user's name and mobile phone number when creating a new SMS.
- **From Mobile** - **Complete Data Professional** uses the mobile phone number entered for each user, as the number the message will be sent from. This allows the recipient to be able to reply to the message back to your mobile phone. If the mobile phone number is incorrect, you can correct it by returning to the Main Menu, selecting My Settings and updating the appropriate fields before trying again.
- **Phone Mobile** - this is mobile phone number of the contact you wish to send the message to, which will automatically be inserted from the contacts screen.
- **SMS Message** - If you are not using a template, this is where you type the text of your message. There is a maximum limit of 160 characters for each SMS. Messages exceeding 160 characters cannot be sent.

5. When you have finished composing your message, check the spelling by clicking the Spell Check button.
6. To send the SMS, click the Send SMS button. **Complete Data Professional** will then attempt to send the SMS to the Mobile Messenger, which is a SMS Gateway via the Internet. If successful, a number 10 will appear in the result field at the bottom of the screen. Should an error occur, it will be recorded in the Result field also.
Important - Please do not use **Complete Data Professional** while it is attempting to send the SMS. Depending on the speed of your Internet connection and the responsiveness of the

Mobile Messenger Gateway, the message can take a few seconds to send. Wait until the Result field is updated before trying to use the system.
When you have finished sending your SMS, click the Contacts button to return to the Contacts screen. To view any SMS's that have previously been sent, click the button to the right of the SMS in the list.
If you would like to delete an SMS, click the red X button to the right of the message.

Send a bulk SMS

Complete Data Professional has the ability to find a group of contacts (e.g. all buyers) and send them all the same SMS.



To send a bulk SMS:

1. Go to the **Complete Data Professional** Main Menu.
2. Click the Contacts button.

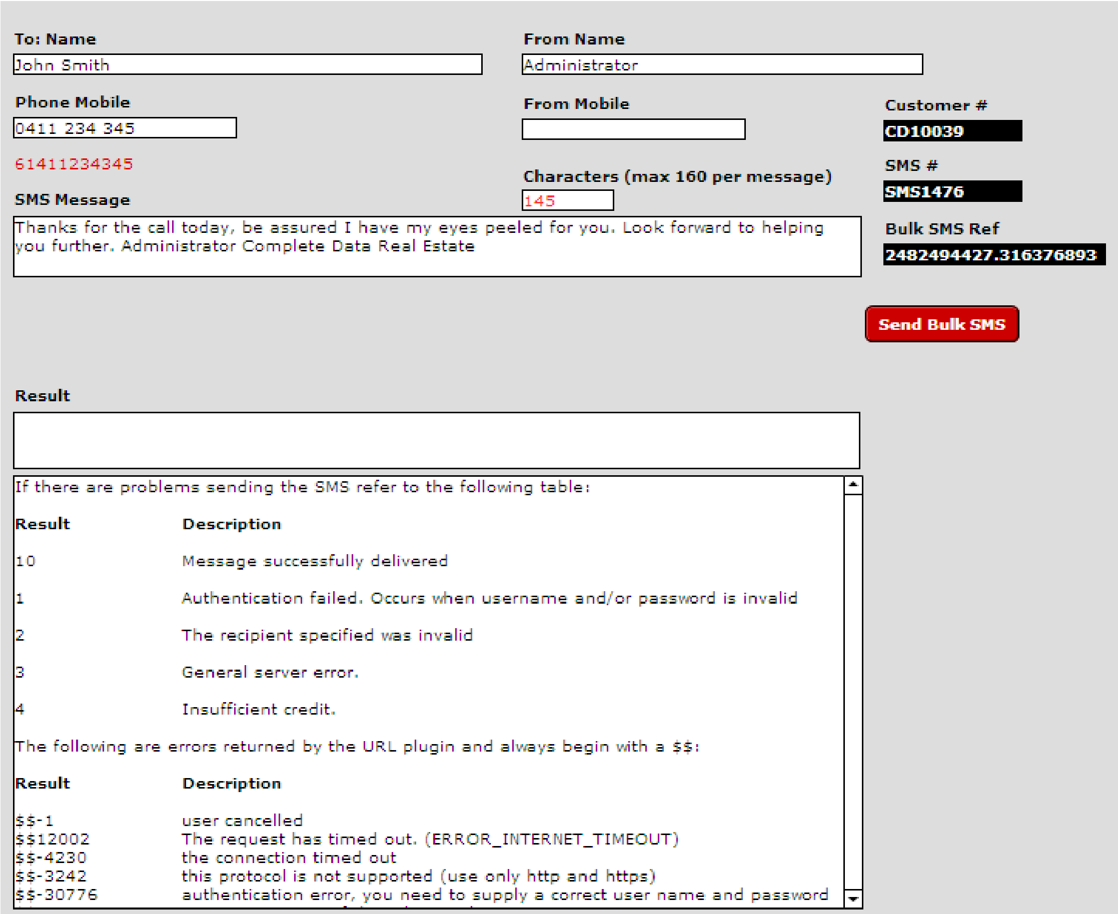
Click the Find button and enter the criteria you wish to search for (e.g. all contacts with 'Yes' in the Buyer field); then press Enter on the keyboard to perform the Find or click on the grey find button to finalise your find. The status area on the left of the screen will change to reflect the found set of contacts. Of these found contacts, only those with a valid mobile phone number will be included when sending the bulk SMS.

1. Click the red SMS button at the top of the screen and then select the Bulk SMS button which displays the following screen:
2. This is where you enter the SMS message and select the name of the sender so that any replies are sent back to that person's mobile phone number.

Note: You can send a sms on behalf of another user in your office by selecting there name from the from field dropdown list.

1. You can spell check the message by clicking the Check Spelling button.
2. Once you are ready to create the SMS (e.g. 60 SMS messages for 60 found contacts) click the Prepare Bulk SMS button. This will create an SMS message for each record in your current found set and groups them together so they can be sent in one go. **Note:** Clicking this button **does not send the SMS**. Rather, it creates the SMS messages to be sent. Once you have clicked this button you will be taken to the SMS database where you send the SMS messages, as follows:

send the SMS

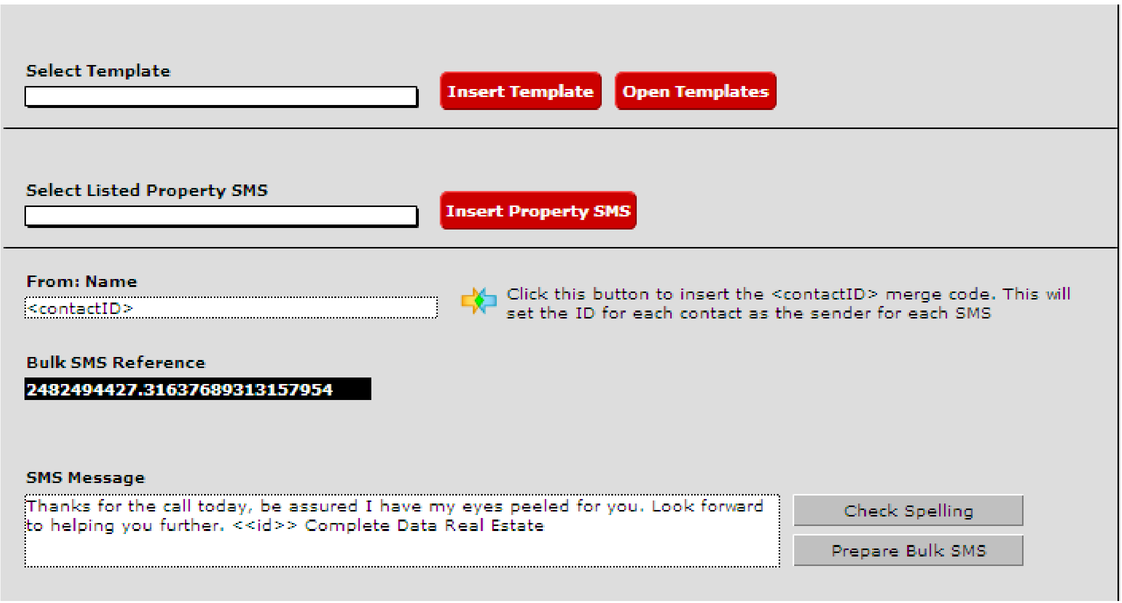


1. To send the SMS's, click the Send Bulk SMS button. Depending on how many SMS's you are sending and the speed of your Internet connection, this process can take from several minutes to several hours.

Please do not try to use **Complete Data Professional** until it has finished sending the SMS's.
Once the bulk SMS has been sent to all recipients, click the Contacts button to return to the Contacts database.

Send An SMS Using A Template

As discussed earlier in this guide, **Complete Data Professional** comes standard with a number of templates that you can use and customise to make your own. You can also create your own templates if you wish. You would have done this when customising your system.



You can use a template when sending a one-off SMS to a single contact or a bulk SMS to a group of contacts.
To insert a template, simply follow the same steps for sending an SMS, except when you add the message text, perform the following additional steps:

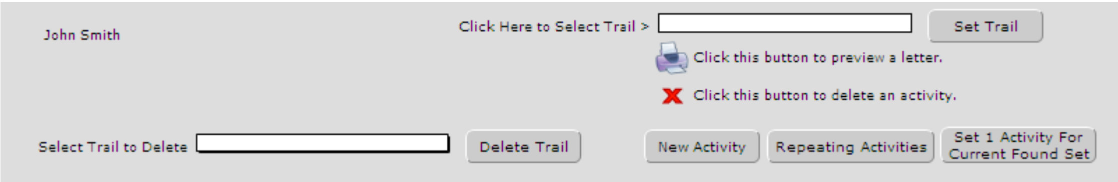
1. In the top left-hand part of the screen, you will see a drop-down list labelled 'Select Template from CD Templates'. When you click in this field you will get a drop-down list of all SMS templates (i.e. all templates from the Templates database with the Template Type = 'SMS').

2. Select a template from the list and click the Insert Template button.
The text from your selected template will appear in the SMS Message field as if you had typed it in manually. Any merge fields will be substituted for the appropriate data from **Complete Data Professional** for that contact (for a bulk email, the merge fields will be substituted later).
3. Make any required changes and then click the Send SMS button to send your SMS to that contact (for a bulk email, you would select the Prepare Bulk SMS button).

Trails - Managing Your Contacts

Once your contacts have been established in **Complete Data Professional** and you are familiar with all the different ways you can correspond with them, it is essential that a follow-up plan of action be set against each and every one of them.
Complete Data Professional provides you with the tools to professionally manage your clients with ease, ensuring they never become lost in the system.

How to set a follow-up trail against a contact



A trail is a follow-up action plan for a contact. No matter whom you put into your database you need to set that contact on a trail. This feature means there is no way you can forget about them.
The tasks appear in your scheduled tasks on the due date, so you don't have to worry about remembering them - as long as you set a trail against every contact and check your scheduled tasks daily, you can be assured you will be speaking with the right people at the right time.

1. So how is it done?
2. Go to the **Complete Data Professional** Main Menu.
3. Click the Contacts button.
4. Click the Find button and enter the criteria you wish to search for (e.g. John Smith) and then press Enter on the keyboard to perform the Find.
5. Click the Trails button.
6. Click in the field to the left of the Set Trail button and you will be shown a list of all the Buyer or Prospect trail types in your Trails database:
7. Select the required trail from the list (e.g. TC008 42 day Buyer Trail (Standard)) and select the Set Trail button.
8. You will be prompted to select the starting date for this trail using the pop-up calendar. Select the date you wish to start this trail from (often this will be today's date).

Complete Data Professional will create the activities for the selected trail and set them against the selected contact. For example, the 42 day Buyer Trail (Standard) comprises 6 activities. If you selected 01/08/2008 as your starting date for this trail they would appear in your scheduled tasks as follows:

Days from Start in Trail	Due Date Starting from 01/03/2012
3	04/08/2012
10	11/08/2012
14	15/08/2012
21	22/08/2012
28	29/08/2012
42	12/09/2012

Once you have set the trail you can make any changes required (e.g. changing the date for any activities or changing the person assigned to each activity).
The ID for each activity will reflect the ID that has been entered into that trail in the Person column. Leaving this column blank will assign the activity to the person setting the trail by default. The ID can be changed by selecting a different ID from the drop-down list.
To delete an activity, simply click the red X button to the right of it.

How to delete a trail

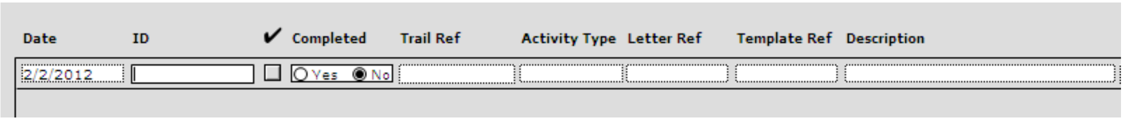
1. Go to the **Complete Data Professional** Main Menu.
2. Click the Contacts button.
3. Click the Find button and enter the criteria you wish to search for (e.g. John Smith) and press Enter on the keyboard to perform the Find.
4. Click the Trails button. The drop-down list to the right of Select Trail to Delete displays all trails previously set against this contact.
5. Select the trail you wish to delete and click the Delete Trail button next to it. Only activities for the selected trail that have **not** been completed will be deleted.

Remember to set any new trails or activities for this contact so they do not get lost in the system, never to be followed up in the future.

Single Activities and Repeating Activities

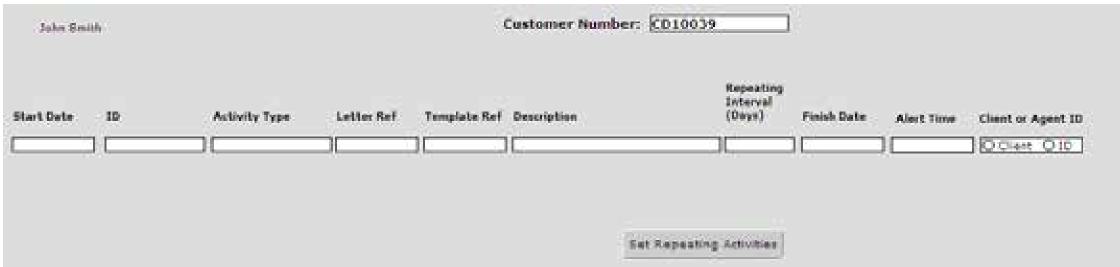
There are times when you just want to set a one-off activity against a contact or a set of repeating activities, such as a phone call every three days over a one month period. **Complete Data Professional** allows you to do those things.

To set a one-off activity against a contact



1. Go to the **Complete Data Professional** Main Menu.
2. Click the Contacts button.
3. Click the Find button, enter the criteria you wish to search for (e.g. John Smith) and press Enter on the keyboard to perform the Find.
4. Click the Trails button.
5. Click the New Activity button and a new blank activity will be created. Fill in the details, including the Due Date, ID, Activity Type and Description.

To set a repeating activity against a contact



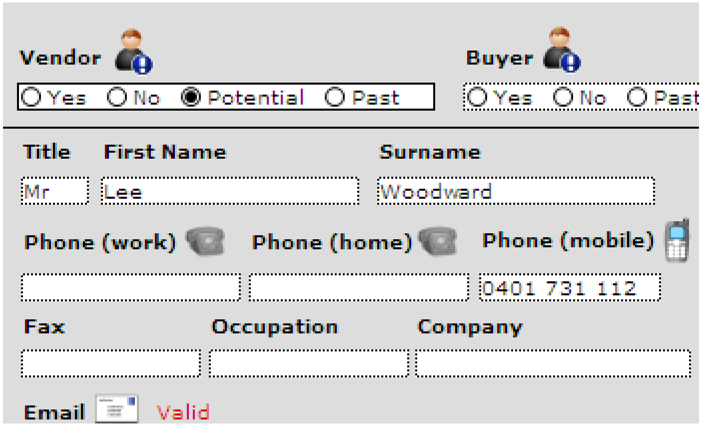
1. Go to the **Complete Data Professional** Main Menu.
2. Click the Contacts button.
3. Click the Find button, enter the criteria you wish to search for (e.g. John Smith) and press Enter on the keyboard to perform the Find.
4. Click the Trails button.
5. Click the Repeating Activities button. You will then need to enter the details for this repeating activity as follows:
6. **Start Date** - the day you wish to start the series of repeating activities.
7. **ID** - the ID for the person responsible for completing these activities (usually yourself).
8. **Activity Type** - select the type of activity from the drop-down list (Phone Call, Letter etc.).
9. **Letter Ref** - if the Activity Type is a letter, select the required letter from the drop-down list.
10. **Description** - enter a Description for this repeating activity.
11. **Repeating Interval (Days)** - select the number of days you wish this activity to repeat (e.g. you might want to call someone every 5 days for a month so you would select ‘5’).
12. **Finish Date** - the end date for this series of repeating activities.
13. **Alert Time** - Set the time to send an email or sms to the ID selected or to the Client
14. **Client or Agent ID -** Set the email or sms to the ID selected or to the Client (note robot marketing needs to be set on the server)

Appraisals

Appraisals

All market appraisals conducted by your agency can easily be tracked by entering them into the Appraisals database in **Complete Data Professional**. Once there they can simply be converted into listings without the need to re-enter any information.
Note: The vendor must be entered into the Contacts database before they can be entered as a new appraisal.

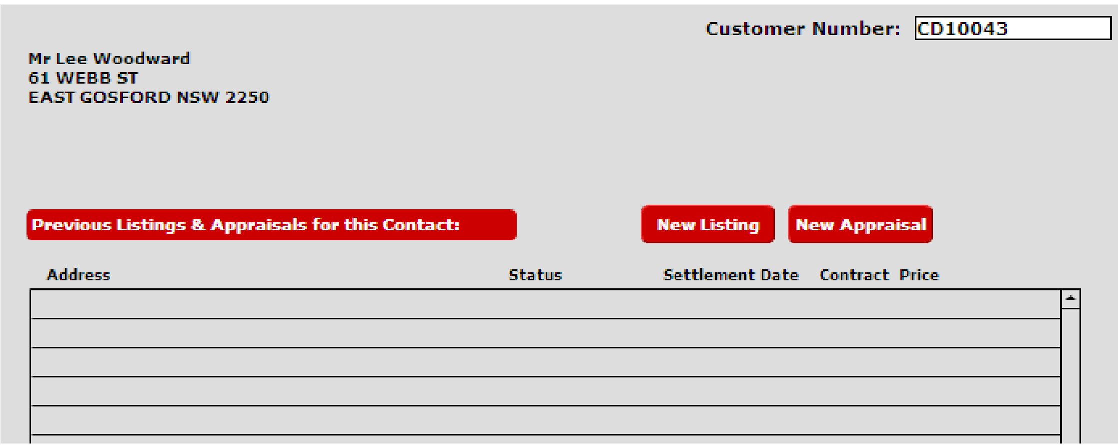
How to enter a new appraisal



Firstly, you must find the details of the contact you are going to do an appraisal for.

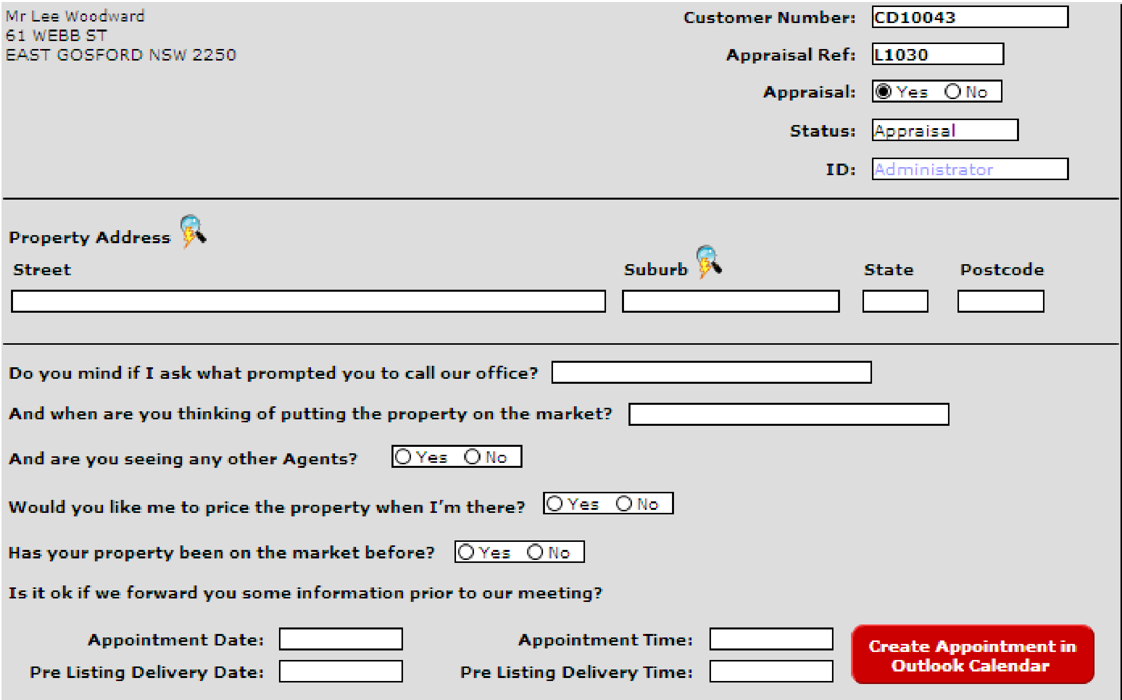
1. Go to the **Complete Data Professional** Main Menu.
2. Select the Contacts Database.
3. Find your contact's details, for example Mr Lee Woodward.
4. In the details screen for Mr Lee Woodward, select 'Potential' in the Vendor field.

New Appraisals Screen



1. Click the Vendor icon. You are taken to the Appraisal screen, where you will see any previous appraisals conducted for this contact.

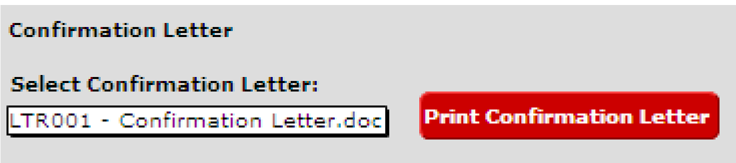
Add Address and Calendar Reminder



Click on the New Appraisal button and you are taken to the Appraisal screen.

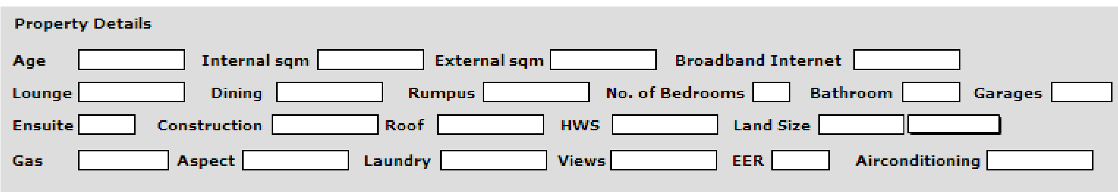
1. If the address of the property you are appraising is the same as the contact's postal address, click the magnifying glass to insert the property address. If it is different, enter the property address manually.
2. Complete the following fields: Appointment Date, Appointment Time, Pre Listing Delivery Date and Pre Listing Delivery Time.

Print Confirmation Letter



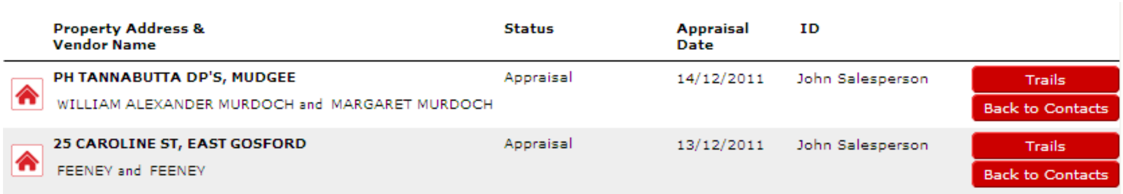
1. If you want to print a confirmation letter for the market appraisal, click the Print Confirmation Letter button to print a confirmation letter to the vendor (if you have established multiple confirmation letters, you must first select the confirmation letter you would like to print from the drop-down menu).

Property Details



1. Clicking the Property Details button takes you to the standard property listing screen which is useful for entering details about the property, such as the number of bedrooms, bathrooms, inclusions etc.

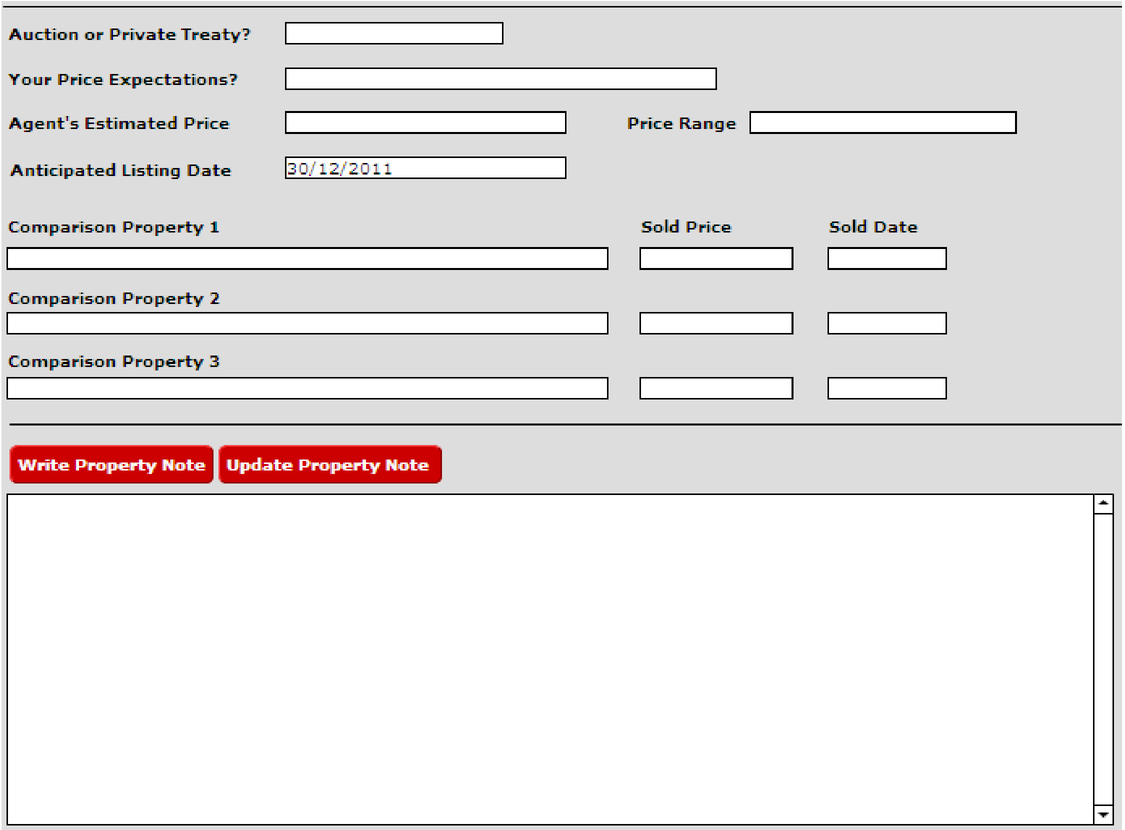
Updating appraisal details



Following completion of the appraisal, it is advisable to update the details in **Complete Data Professional**. To do this, perform the following steps:

1. Go to the **Complete Data Professional** Main Menu.
2. Select the Appraisals button. This opens the Appraisals/Listings database and finds all appraisals for your agency sorted by the Appointment Date with the most recent at the top.
3. Locate the appraisal in the list and click the Details button. This will take you to the Appraisal screen for that contact. You will recognise that this is the same screen you use when creating a new appraisal.

Adding Additional Information



Fill in the additional information for example the Agent's Estimated Price

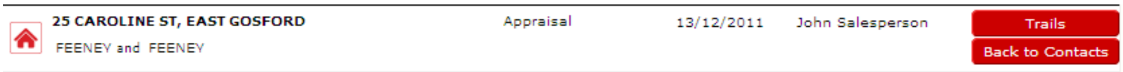
1. Towards the bottom of the Appraisal screen you will notice three Comparison Property fields, allowing you to record similar property sale prices to help justify your estimated price for this particular property.
2. You might also wish to record a note about the appraisal or your conversation with the vendor. Click the Write Note button to get started. Your name, date and time are entered automatically before the note you wish to record. This feature is useful for any additional information you may wish to record about an appraisal/listing.

Note: You must click the Update Note button to save any new note that you have written before navigating elsewhere in **Complete Data Professional**. Once you click the Update Note button, the note is saved and the most recent note appears at the top of the Notes field.

Set a Follow up Trail - Appraisal

1. Go to the **Complete Data Professional** Main Menu.
2. Select the Appraisals button. This opens the Appraisals/Listings database and finds all appraisals for your agency sorted by the appointment date, the most recent being at the top.

Appraisal List View



1. Locate the appraisal you require from the list and click the Details button.
2. Select the Trails button.
3. Click in the field to the left of the Set Trail button and you will be shown a list of all the appraisal/listing trails within your Trails database.

Appraisal Trail Screen

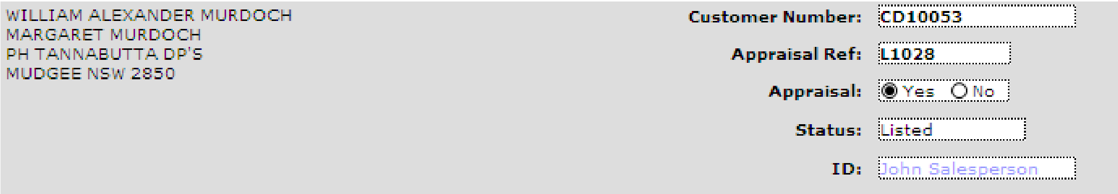
1. Select the required trail from the list (e.g. TC014 Follow Up Appraisal) and click the Set Trail button.
2. You will be prompted whether you wish to set this trail against the Vendor or the Purchaser. In this case, the property is an appraisal so there is no purchaser involved yet; therefore you will select 'Vendor'.
3. The system will prompt you to select the starting date for this trail using the pop-up calendar. Select the date you wish to start this trail from (generally this will either be today's date or the date of the appraisal).

Complete Data Professional will create the activities for the trail and set them against the selected contact.

Once you have set the trail, you can make any changes required (e.g. changing the date for any activities or changing the person assigned to each activity). The ID for each activity will reflect the ID that has been entered into that trail in the Person column. Leaving this column blank when setting up your trails will assign the activity to the person setting the trail by default. **Note:** The ID can be changed by selecting a different ID from the drop-down list. To delete an activity, simply click the red X button to the right of it.

Converting an Appraisal to a Listing

1. Go to the **Complete Data Professional** Main Menu.
2. Select the Appraisals button to open the Appraisals/Listings database.
3. Locate the appraisal in the list and click the Details button.



1. Change the Status from Appraisal to Listed using the drop-down menu. This property will now be automatically included in the list of current listings.
2. If you wish to enter any additional information about this newly listed property, click the Property Details button to go to the main data entry screen for a listing.

Don't forget to update the vendor's contact record by changing their vendor status from 'Potential' to 'Yes' to indicate that they are now a current vendor. Simply click on the red Vendor button to do this.

Listings

The Listings Database

The Listings database stores all properties that your agency has listed for sale. There are two ways to enter a listing:
By converting a market appraisal that has previously been entered into **Complete Data Professional** into a listing (see the previous chapter for more information).
By creating a new listing against an existing contact record in the Contacts database.
Note: you cannot enter a listing unless you have first entered the vendor into the Contacts database.

Accessing the Listings database

1. Go to the **Complete Data Professional** Main Menu.
2. Click the Listings button.
3. You will be presented with a list of all the listings in your database with a status of 'Listed'. The total number of records in the Listings database is displayed in the top toolbar.

Note For first time users, the list will be empty and your first step will be to enter your listings or import them from other sources (e.g. Microsoft Excel).

1. To view the full details of an existing listing, click the Property Details button to the left of listing. You will be taken to the main details screen where you can enter and edit details for each listing.

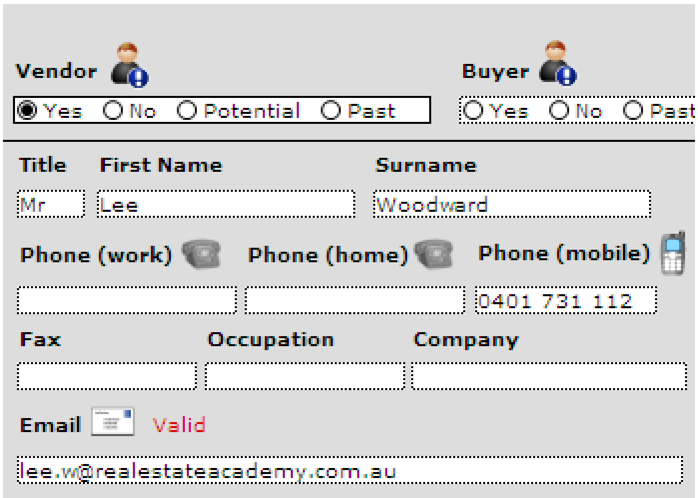
How to move around the Listings database

When you enter the Property Details screen for a particular listed contact, you will see 13 red buttons across the top of the screen:

1. **List View** allows you to look at your current listings as a summary list (the same view you see when clicking the Listings button from the **Complete Data Professional** Main Menu.
2. **Print Report** prompts you to print 3 different standard reports. Report A, Report B, Market Place Report
3. **Trails** allows you to set trails and activities against a listing.

4. **Buyer Match** allows you to match buyers by price range, suburb or bedrooms and generate a summary of the matching buyers. Select the Continue button on the left-hand side of the screen to either print the summary or return to the Property Details screen.
5. **Appraisal** if the listing you are viewing was initially entered as an appraisal, you may wish to view the appraisal details by selecting this button.
6. **Marketing** opens the Marketing database where you can insert property photos, select marketing campaigns and print brochures for the current listing you are on.
7. **Open House** allows you to enter open house details for the current listing you are on.
8. **Sales Advice** displays the Sales Advice screen where you enter the vendor's solicitor/conveyancer details as well as details about the sale of the property, including the purchaser and the purchaser's solicitor/conveyancer.
9. **Documents** allows you to link related documents to this listing (e.g. files external to **Complete Data Professional**, such as a contract or floor plans). Select the Back to Marketing button and then the Property Details button to return to the Property Details screen.
10. **Tenants** allows you enter a tenant's name, number and lease expiry, where relevant. A potential purchaser would want to know when the lease expires on a property. Or if you have an inspection, you would need to contact the tenants to let them know you will be brining someone through the property.
11. **Summary** prints a summary of all of the properties you are currently viewing. Select the Continue button on the left-hand side of the screen to either print the summary or return to the Property Details screen.
12. **Vendor Call Backs** track each contact made with the owners on a weekly basis
13. **Charts** opens the Complete Data Chart Selector, where you can create the following pie charts: Listings - by Listing Agent and Listings - by Selling Agent on the found set.

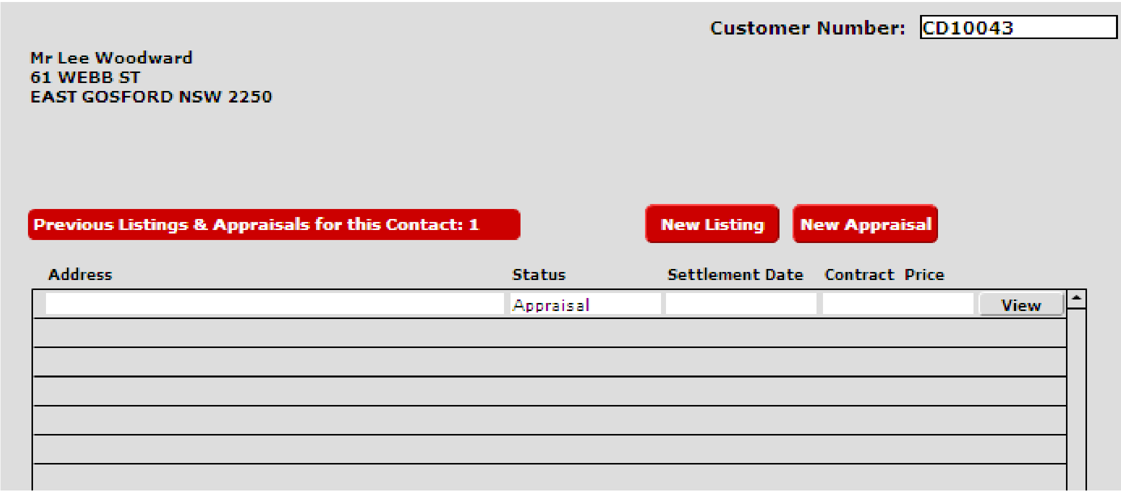
Creating a new listing



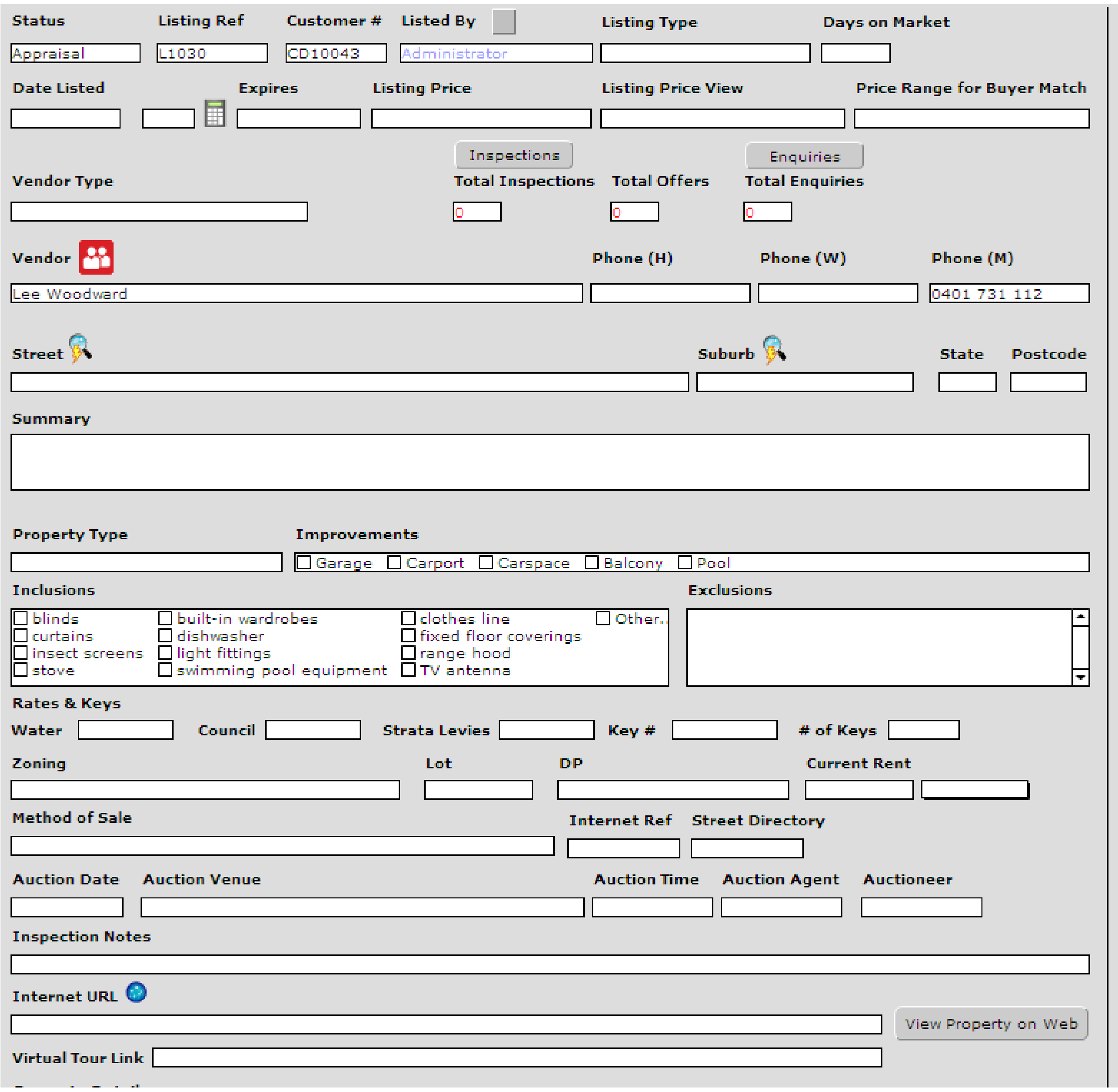
First you have to find the details of the contact you are going to enter a new listing for:

1. Go to the **Complete Data Professional** Main Menu.
2. Select the Contacts database.
3. Find your contact's details. For example Mr Lee Woodward.
4. In the Details screen for Mr Lee Woodward, select 'Yes' in the Vendor box.

Apprails screen



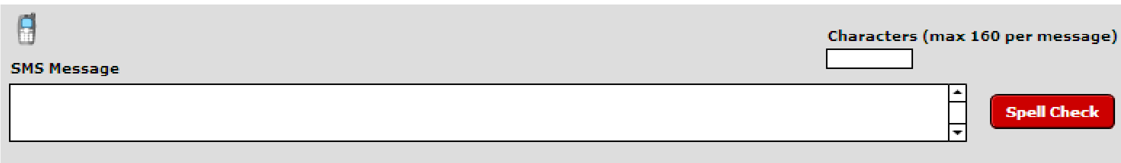
Click the Vendor icon. You will be taken to the Listings/Appraisal screen for this contact. Any previous listings or appraisals will be shown here,



1. Select the New Listing button. You will be taken to the Property Details screen within the Listings database where a new blank listing will be created for you.
2. Enter the property details. The Listing Ref number and Customer # are automatically created for you. Some important fields in the Listings database are:

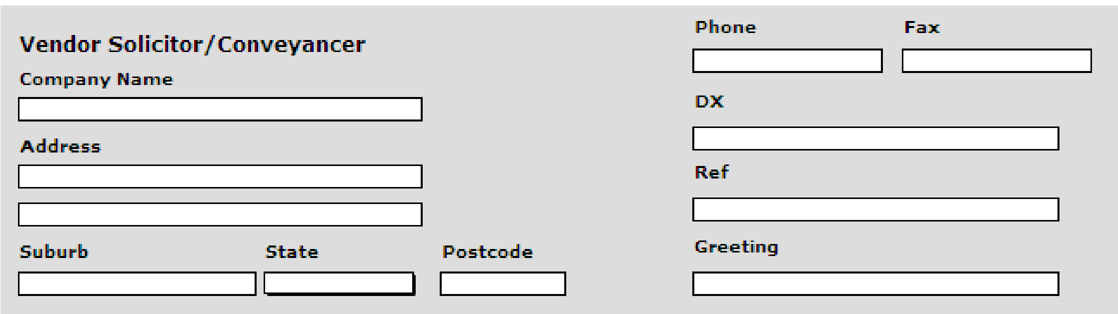
Status: You need to select the Status as Listed and modify the status as the listing changes.
Date Listed: select the listing date using the pop up calendar. This is also used to determine the Days on Market calculation.
Listing Agreement: to the right of the Date Listed field is a drop-down field where you can select the number of days you have secured for your listing/agency agreement (e.g. 90 = 90 days). Click the calculator icon to the right of this field, once you have entered a number, to automatically calculate the expiry date.
Listing Price: enter the listing price. You only need to enter the number without a dollar sign or commas.
Listing Price View: enter the price you wish to advertise for this property. This can be either text or numbers (e.g. Auction or $450,000). **Note:** This is a text type field so you will need to enter a dollar sign and commas if entering a number.
Price Range for Buyer Match: this uses the same drop-down list that appears in the buyer screen within the Contacts database and is used to match buyers for this property by price range.
Property Address: if the address of the property is the same as the vendor's postal address, click the magnifying glass and the address will be automatically inserted for you. If the property address being listed is different, enter the property address manually.

Property SMS



SMS Message: This field, which is located towards the bottom of the screen, allows you to enter an SMS ad for this property (limit of 160 characters) that you can use to SMS to buyers enquiring about this property.

Solicitor Conveyancer

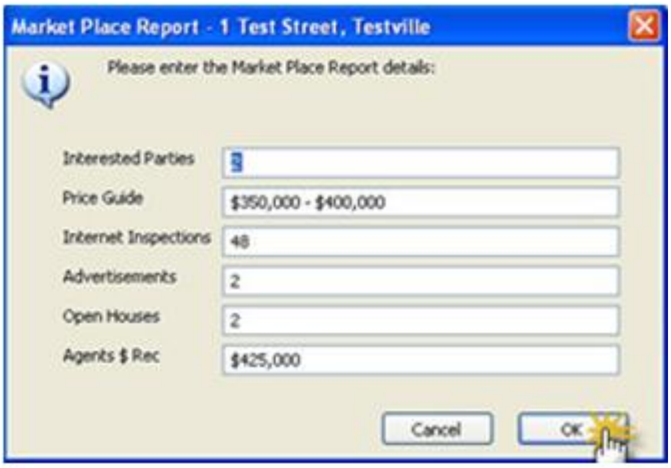


1. Click the red Sales Advice button at the top of the screen to enter the vendor's solicitor or conveyancer details.

Generating Reports For Your Listings

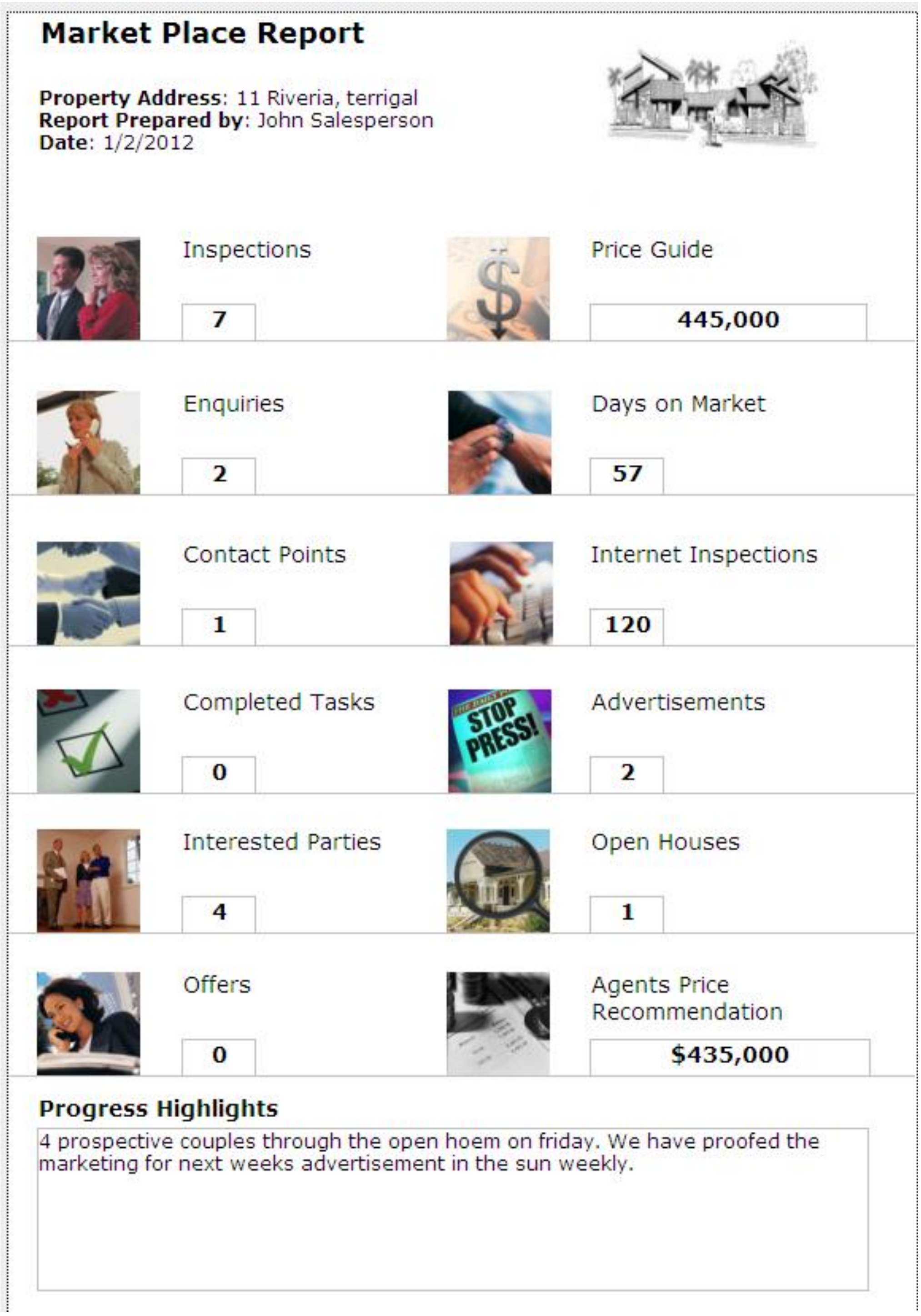
There are three vendor reports that you are able to generate for your listings in **Complete Data Professional**:
Market Place Report
Inspections report
Enquiries report

How to generate a Market Place Report for a listing



1. Go to the **Complete Data Professional** Main Menu.
2. Select the Listings database. All properties with a status of 'Listed' will automatically appear.
3. Locate the listing for which you want to print the report (you can also use the Find button to search for the property if it doesn't appear in the list) and click the Property Details button.
4. Click the red Print Report button at the top of the screen and then select Market Place.
5. A dialogue box will appear prompting you to enter some information for the report. **Note:** if you have previously generated this report, it will be filled in with the previous report's values. Enter the details as required and click OK.

Market Place Report



Market Place Report

Property Address: 11 Riveria, terrigal
Report Prepared by: John Salesperson
Date: 1/2/2012

Inspections	7	Price Guide	445,000
Enquiries	2	Days on Market	57
Contact Points	1	Internet Inspections	120
Completed Tasks	0	Advertisements	2
Interested Parties	4	Open Houses	1
Offers	0	Agents Price Recommendation	$435,000

Progress Highlights

4 prospective couples through the open hoem on friday. We have proofed the marketing for next weeks advertisement in the sun weekly.

1. You will be presented with the Progress Highlights dialogue box. **Note:** if you have previously generated this report, it will be filled in with the previous progress highlights. Enter your progress highlights for this property and click OK.
2. The Market Place Report will be generated and previewed on the screen.

Note: in addition to the fields you are prompted to enter when generating a Market Place Report, you will notice there are a number of additional fields that appear on the report. These are calculated automatically as follows:

Inspections inspections entered against this listing.

Enquiries enquiries entered against this listing.

Days on Market the number of days since the date listed.

Contact Points the number of notes that have been entered in the Property Notes field for this listing. (Every time you speak with a vendor, you should be writing a note to the listing).

Completed Tasks - completed activities from the Trails screen for this listing.

Offers - offers that have been entered against this listing.

1. Click the Continue button on the left-hand side of the screen (or press the Enter key on your keyboard) and you will be asked if you wish to print this Market Place Report select 'Yes' if you wish to print it or 'No' to return to the Property Details screen for the selected listing.

How to generate an Inspections report for a listing

Inspection Report for 11 Riveria, terrigal

Total Inspections: 7

Date Outcome & Comments	Price Indications	Salesperson	Buyer Name
1/6/2011	445000	Dean Connolly	
Likes the home, wants to inspect more properties			**Offer** No
8/6/2011	455000	Dean Connolly	Fred Flinstone and Wilma
Likes the home, wants to inspect more properties			**Offer** No
22/6/2011	445000	Dean Connolly	
Likes the home, wants to inspect more properties			**Offer** No
30/6/2011	445000	Dean Connolly	Katie Cruise and Tom
Likes the home, wants to inspect more properties			**Offer** No
29/10/2011		Dean Connolly	
			Offer No
22/11/2011		John Salesperson	Fred Flinstone and Wilma
			Offer No
10/1/2012		John Salesperson	Fred Flinstone and Wilma
			Offer No

1. Go to the **Complete Data Professional** Main Menu.
2. Select the Listings database. All properties with a status of 'Listed' will automatically appear.
3. Locate the listing you wish to print the Inspections report for (alternatively you can use the Find button to search for the property if it doesn't appear in the list) and click the Property Details button.
4. Select the Inspections button. All inspections that have been entered against this property will appear.
5. Click the Report button and the Inspection report will be previewed.
6. Click the Continue button on the left-hand side of the screen (or press the Enter key on your keyboard) and you will be asked if you wish to print this Inspections report select 'Yes' if you wish to print it or 'No' to return to the Property Details screen for the selected listing.

How to generate an Enquiries report for a listing

Real Estate Academy Enquiry Report
Total Enquiries for 11 Riveria, terrigal: 2

Enquiry Date	Name	Status	Lead Source	ID
29/11/2011	Fred Flinstone and Wilma	Moved to Contacts	Ref Agent	John Salesperso
1/2/2012	John Smith		Contact List	Administrator

1. Go to the **Complete Data Professional** Main Menu.
2. Select the Listings database. All properties with a status of 'Listed' will automatically appear.
3. Locate the listing you wish to print an Enquiries report for (you can also use the Find button to search for the property if it doesn't appear in the list) and click the Property Details button.
4. Click the Enquiries button. All enquiries that have been entered against this property will appear.
5. Click the Report button and the Enquiries report will be previewed showing all enquiries for this property.
6. Click the Continue button on the left-hand side of the screen (or press the Enter key on your keyboard) and you will be asked if you wish to print this Enquiries Report select 'Yes' if you wish to print it or 'No' to return to the Property Details screen for the selected listing.

Set a Follow up Trail - Listing

1. You should get into the habit of setting a trail against every new listing and then additional trails throughout the life of the listing. The trail is essentially your follow-up action plan for that listing.

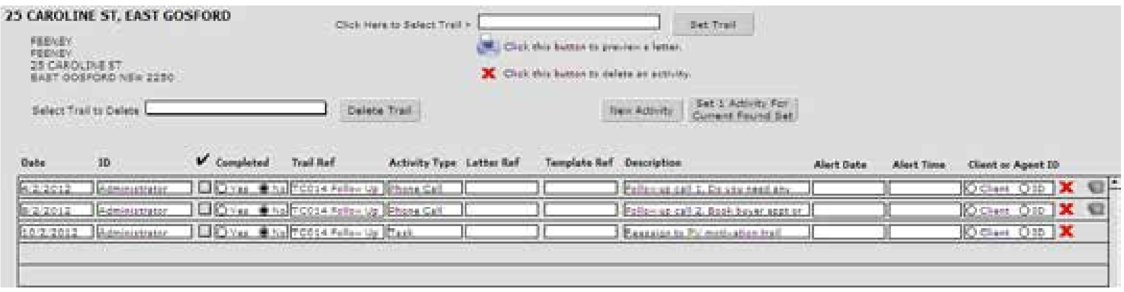
The tasks appear in your scheduled tasks on the due date so you don't have to worry about remembering them - as long as you set a trail against every listing and check your scheduled tasks daily, you will keep on top of the tasks required for each listing. (Refer to the heading - How to view your scheduled tasks later in the guide).

There are a number of trails that you could set to a listing - the first one is generally the Awaiting Contract trail (TC004). **Note:** It is a good idea to customise your trails to reflect your market, rules and regulations and the way your agency operates (refer to the Customising your System chapter for details on how to do this).

Listings List View

1. To set a trail against a listing:
2. Go to the **Complete Data Professional** Main Menu.
3. Select the Listings Database. All properties with a status of 'Listed' will automatically appear.
4. Locate the listing you wish to set a trail against (you can also use the Find button to search for the property if it doesn't appear in the list) and click the Property Details button.
5. Click the Trails button.
6. Click in the field to the left of the Set Trail button and you will be shown a list of all the listing trail types within your Trails database.

Listing Trail Screen



1. Select the required trail from the list (e.g. TC004 Awaiting Contract Standard) and click the Set Trail button.
2. You will be prompted to set this trail against the vendor or the purchaser. This links up the tasks for this trail to the vendor's contact record (or the purchaser's contact record when selecting Purchaser).
3. The system will prompt you to select the starting date for this trail using the pop-up calendar. Select the date you wish to start this trail from (generally this will be today's date or the date listed).

Complete Data Professional will create the activities for the selected trail and set them against the selected contact. Once you have set the trail you can make any changes required (e.g. changing the date for any activities or changing the person assigned to each activity). The ID for each activity will reflect the ID that has been entered into that trail in the Person column. Leaving this column blank when setting up your trails will assign the activity to

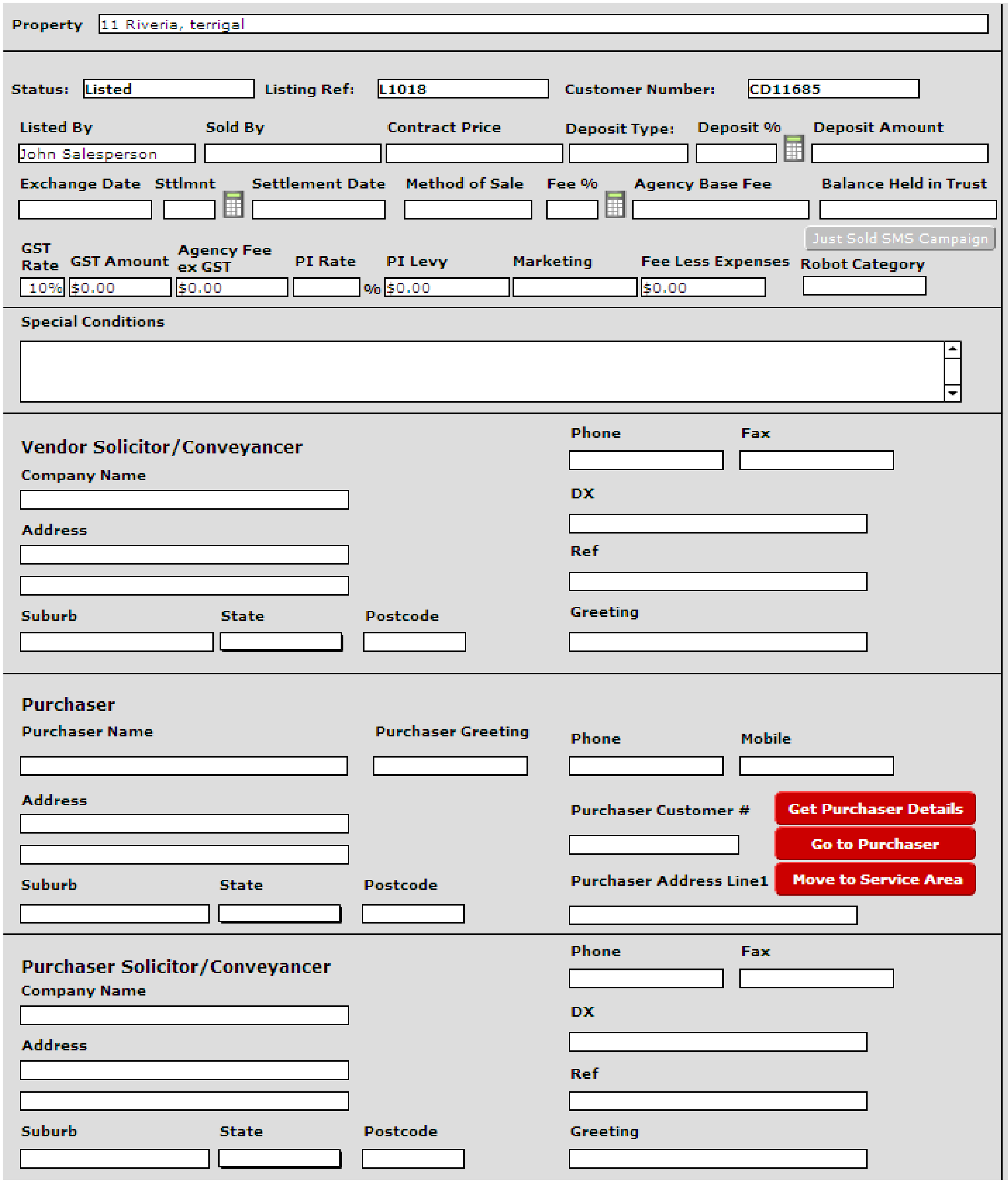
the person setting the trail by default. **Note:** The ID can be changed by selecting a different ID from the drop-down list.
To delete an activity, simply click the red X button to the right of it.

Selling A Property And The Sales Advice

Once you have an offer accepted on a property, you will need to fill in the Sales Advice screen.

- Go to the Complete Data Main Menu.
- Select the Listings Database.

Find the listing/property for which you have an offer accepted and click on the Sales Advice button. You will then be brought to the following Sales Advice screen:



- Enter the Sales Advice details. The Property, Listing Ref, Customer Number, Listed By and the Vendor Solicitor/Conveyancer details will already be filled in. Some important fields in the Sales Advice screen are:

Status: You will need to select the Status as 'Offer Accepted' or 'Exchanged' and modify it as the listing changes.
Sold By: Select the agent that sold the property.
Contract Price: This is where you put the amount of the offer that has been accepted.
Deposit Type: Select the deposit type, e.g. cheque.
Deposit %: Select the deposit percent, e.g. 10%. Then click the calculator icon to the right of this field, to automatically calculate the Deposit Amount.
Exchange Date: select the date contracts were exchanged using the pop-up calendar.
Sttlmnt: Select the number of weeks till settlement, e.g. 6 weeks.. Then click the calculator icon to the right of this field, to automatically calculate the Settlement Date.
Method of Sale: Select the method of Sale, e.g. Private Treaty.
Fee %: Select your Agency fee, e.g. 2.9%. Then click the calculator icon to the right of this field, to automatically calculate the Agency Base Fee, GST and Agency Fee excluding GST.
PI Rate: This is sometimes called Phone In rate, which you would use if you were a franchise. It is where you would put your franchise fee percentage, e.g.0.02, which is 2%. Once you enter the percentage, it will auto calculate the 'PI Levy', which is your franchise fee.
Marketing: This is where you would put any marketing costs that come out of your Fee Less Expenses.
Fee Less Expenses: This is your Agency Fee excluding GST PI Levi and Marketing.
Special Conditions: This is where you would put any special conditions on the sale of the property.
Vendor Solicitor/Conveyancer Section: This should already be filled in from when you listed the property. If not, just click on the company name field and select the solicitor from the drop-down list and all fields will automatically populate.
Purchaser Section: To link a purchaser to the sale you will need to go to the Contacts database, find the contact record of the purchaser and copy the 'Customer Number'. Then use your 'Window' menu in the top grey toolbar and select 'CD_Listings' from the drop-down list. Put your curser into the 'Purchaser Customer #' field and paste the customer number. Once you have the Purchaser Customer # field filled in, you can click on the 'Get Purchaser Details' button and all of the fields will automatically populate.
Purchaser Solicitor/Conveyancer Section: Click on the company name field and select the solicitor from the drop-down list and all fields will populate with the Purchaser Solicitor details.

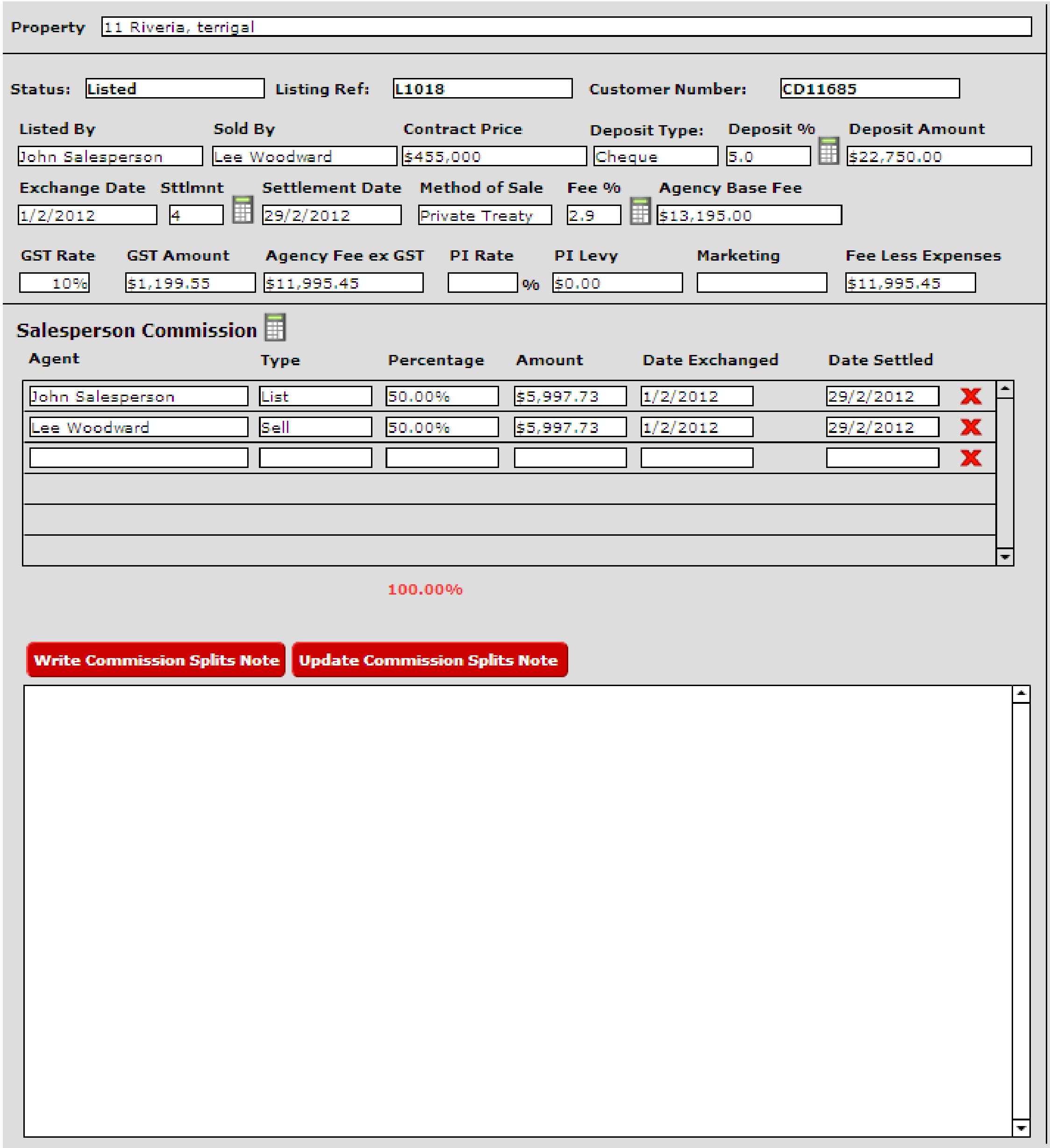
- Once you have completed the Sales Advice Screen you can now print the Sales Advice. At the top of the screen there is a 'Print Sales Advice' button. When you click on this it will open the Sales Advice Letter (Word Document). You will then need to merge the letter (see mail merge section of this manual) and print.

Commission Splits

Once a property settles, you will need to enter your Commission Splits. To do this:

1. From the Main Menu click on the Listings button, locate the property that has settled and click the 'Sales Advice' button.
2. Change/ make sure the 'Status' is Settled.
3. Click on the 'Commission Splits' button at the top of the screen and you will be prompted to enter in the Commission Splits Password. Once you have entered in the password you will be brought to the following Commission Splits screen:

Commission Splits



1. You will notice that the top section of the Commission Splits screen will already be filled in from when you completed the Sales Advice section.

2. To fill in the commission splits, you will need to scroll down to the Salesperson Commission section and fill in the following fields:

Agent: Select the agent from the list who listed the property.
Type: Select 'List' as this is the commission for listing the property.
Percentage: Select the percentage the agent receives for listing the property eg: 0.50 is 50%. Once you have selected the percentage, the amount will auto calculate.

1. You will also need to repeat the above steps for the Selling Agent.

Note: Once a property has settled, you will need to go back to the Vendor's contact record and change the Vendor field to 'Past'. You will also need to change the Purchaser's contact record to say 'Past' in the Buyer field.

Service Area

The Service Area

The Service Area is a database within **Complete Data Professional,** which allows you to prospect to owners of properties in your farm area/the area you service. You can use the Service Area to generate market appraisals and new contacts for you to follow up. Where possible, we recommend purchasing the property/owner details from a data information provider that sells data to real estate agencies in your area. This will allow you to quickly populate your Service Area database so you can start setting trails and generating market appraisals and new contacts.
You can also use the Service Area for producing a CMA (comparative market analysis) of all past sales and current listings in your area (once you have populated and maintained your data).

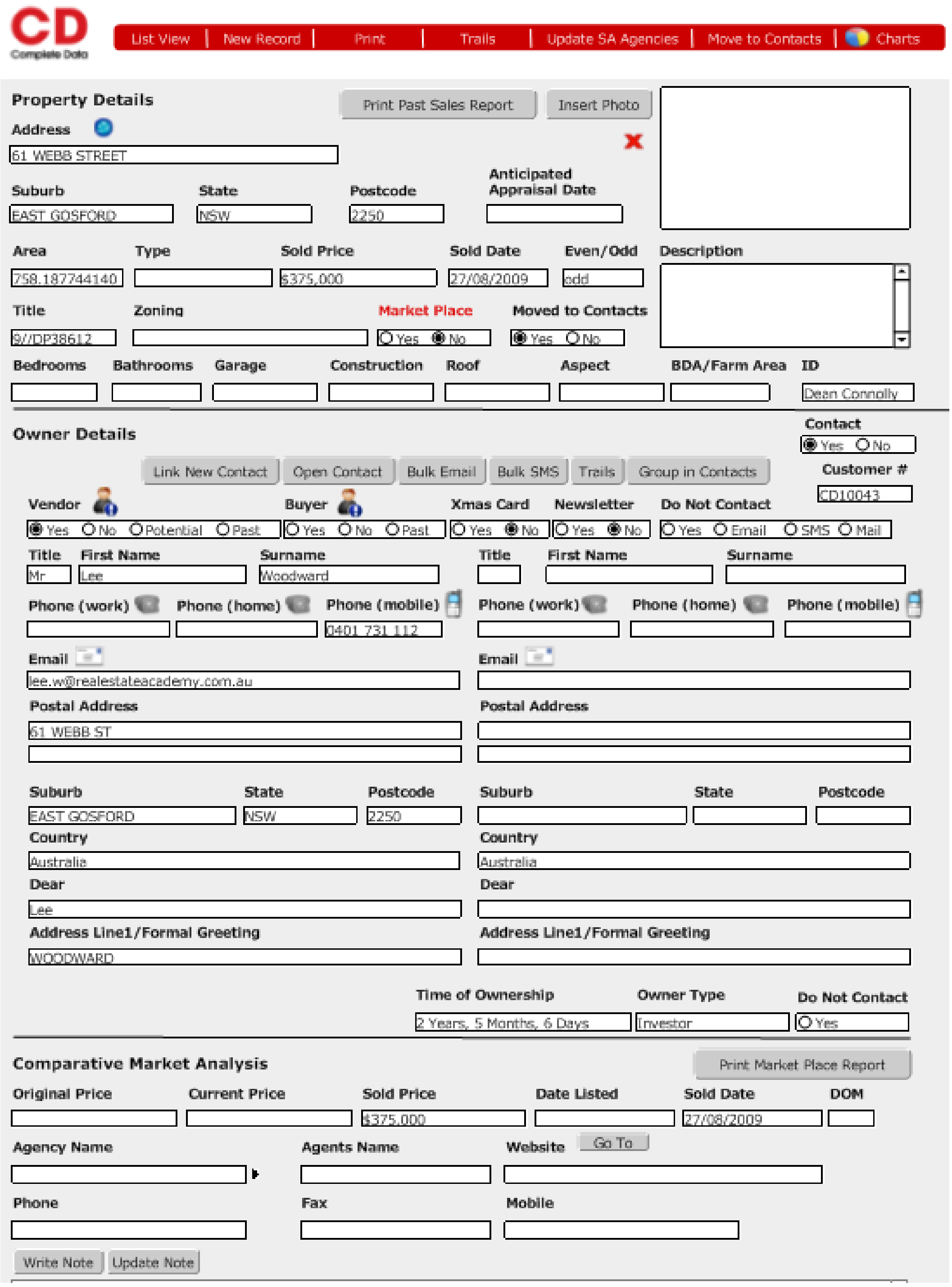
To access the Service Area database

	Address	Suburb	Sold Price	Sold Date
	1 ADELAIDE ST	EAST GOSFORD	$525,000	30/07/2010
	2 ADELAIDE ST	EAST GOSFORD	$345,000	27/02/2008

1. Go to the **Complete Data Professional** Main Menu.
2. Select the Service Area database.

You will be presented with a list of all the properties in your database showing you the property address, suburb, sold price and sold date. For first time users the list will be empty and your first step will be to enter your properties or import them from other sources.

Property Details



1. To view the full details of an existing property click the Details button on the left.

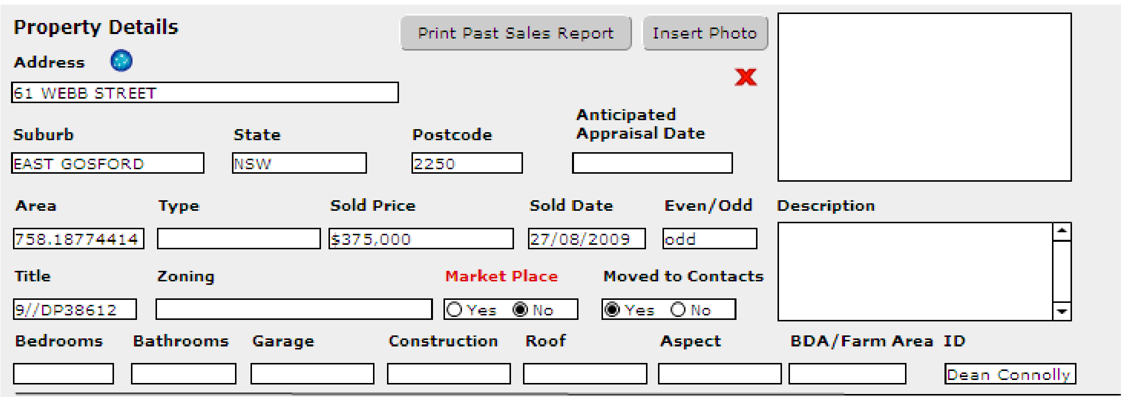
This is the main details screen where you can enter and edit details for each property in the Service Area. The total number of records in the Service Area database is displayed on the left-hand side of the screen.

Navigating the Service Area

1. **List View** allows you to look at your current properties as a summary list.
2. **New Record** click on this button to create a new blank record.
3. **Print** allows you to print the details for the property/s you are viewing.
4. **Trails** allows you to set trails and activities against a property/owner.
5. **Update SA Agencies** allows you to store details of the real estate agencies in your area, so you do not have to keep entering them each time you update the Comparative Market Analysis section.
6. **Move to Contacts** click to move the owner of the selected property to the Contacts database. (The system will check for any existing duplicates by surname first).
7. **Charts** opens the Complete Data Chart Selector, where you can create a number of bar and pie charts to the found set of records.
8. **All Records** finds all property records for you and will undo the last Find you did.
9. **View Map whereis.com** click to view a map of this property using the whereis.com.au website. (requires active Internet connection).
10. **View Map Google Maps** click to view a map of this property using the Google Maps website. (Requires active Internet connection).

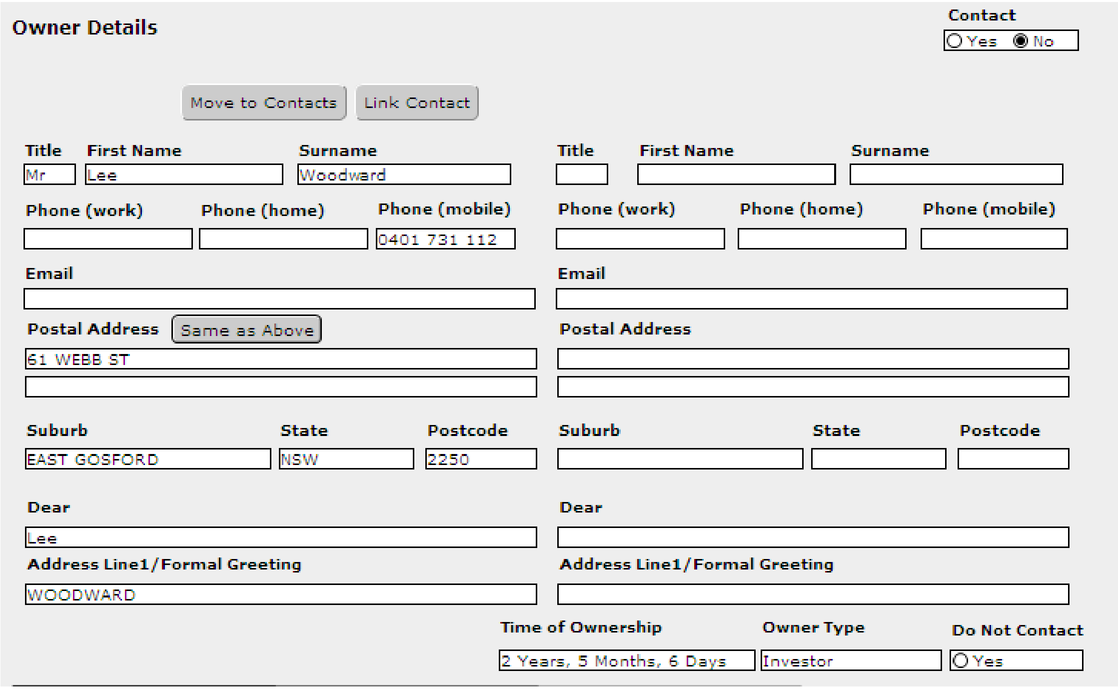
Each property record in the Service Area is divided into 3 sections:

Property Details



1. **Property Details** this is where you record details of a particular property. Apart from the Sold Price and Sold Date these fields will generally not change much over time (unless the property is renovated or redeveloped). Included is a field to attach a photo of the property and a field to type in a property description.

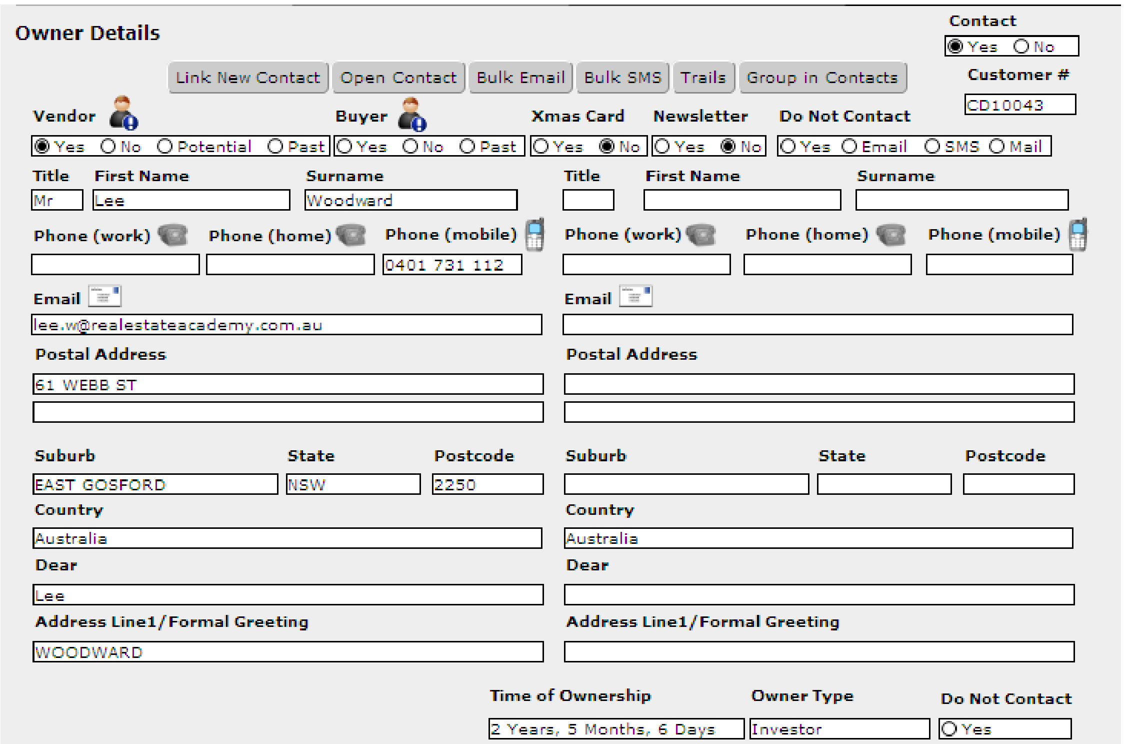
Owner Details



1. **Owner Details** this is where you record the contact details of the property owner. If the address is the same as the property address, you can click the 'Same as Above' button to automatically enter the property address as the Owner's address. **Note:** With the introduction of the Privacy Act, Spam Act and Do Not Call Register it is becoming increasingly harder to source this information from government agencies.

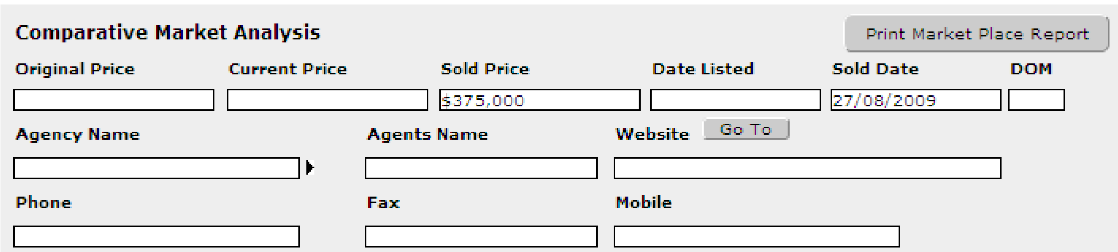
To link a contact record to a property select either move to contacts which will create a new contact record (after checking for duplicates) and link the contact record to this property
or
Link Contact which allows you to search the contacts database and select the owner of this property.

Owner Details Linked Contact



1. **Owner Details** this is where you record the contact details of the property owner. This is the information from the contacts database modifying this information will modify the contacts database.
2. This allows you to email, sms the owner from the service area, the information sent to this owner will stay stored against the owners details in contacts and notes written against this property will link to the contact notes for reference once the property is sold.

Comparative Market Analysis



1. **Comparative Market Analysis** this is where you can track the history of a particular property, as well as the agency that is handling the sale of the property.

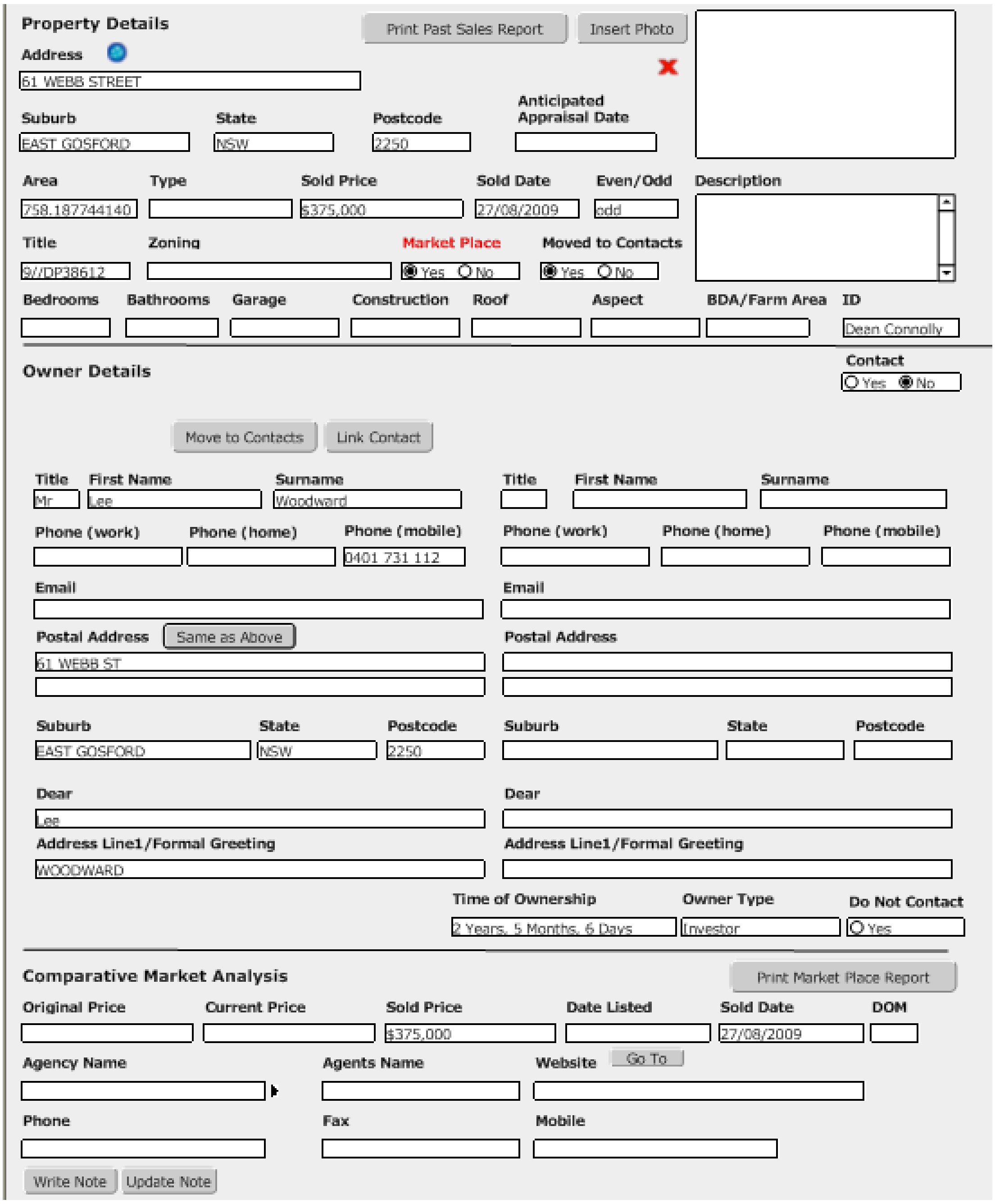
Comparative Market Analysis

There are many ways to populate and maintain the Service Area database. You can do any of the following within your farm area:

- Perform regular sign counts of properties for sale.
- Review properties for sale via Internet websites.
- Review properties for sale via newspaper advertising.

If you know that a property has been listed for sale with another agency and you would like to include it in a CMA report for a client, perform the following steps:

Entering A Record



1. Go to the **Complete Data Professional** Main Menu.
2. Select the Service Area database.
3. Click the Find button. This will clear your screen and put you in Find mode, allowing you to search for the property first to see if it is already in your Service Area database.
4. In the Address field, type in the address of the property and press the Enter key on your keyboard (or click the grey Find button on the left of the screen). If the property is in your database, the record will appear. If the property was not found you will have to click the New Record button to create a record for this property. Make sure you complete all the relevant information, including a description of the property.
5. Ensure the Market Place field is set to 'Yes'. This will notify the database that this property has come onto the marketplace.

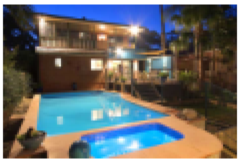
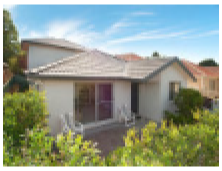
Service Area, Market Place 'Yes' - It's on the Market.

1. If you have a photo of the property, insert it by clicking the Insert Photo button.
2. Insert a description of the property - you could simply copy this from the listing agency's website.
3. Scroll down the page and complete the Comparative Market Analysis section. **Note: If you don't know the date the property was listed, simply enter the date you first became aware of it.**

Generating a Current Listings CMA report

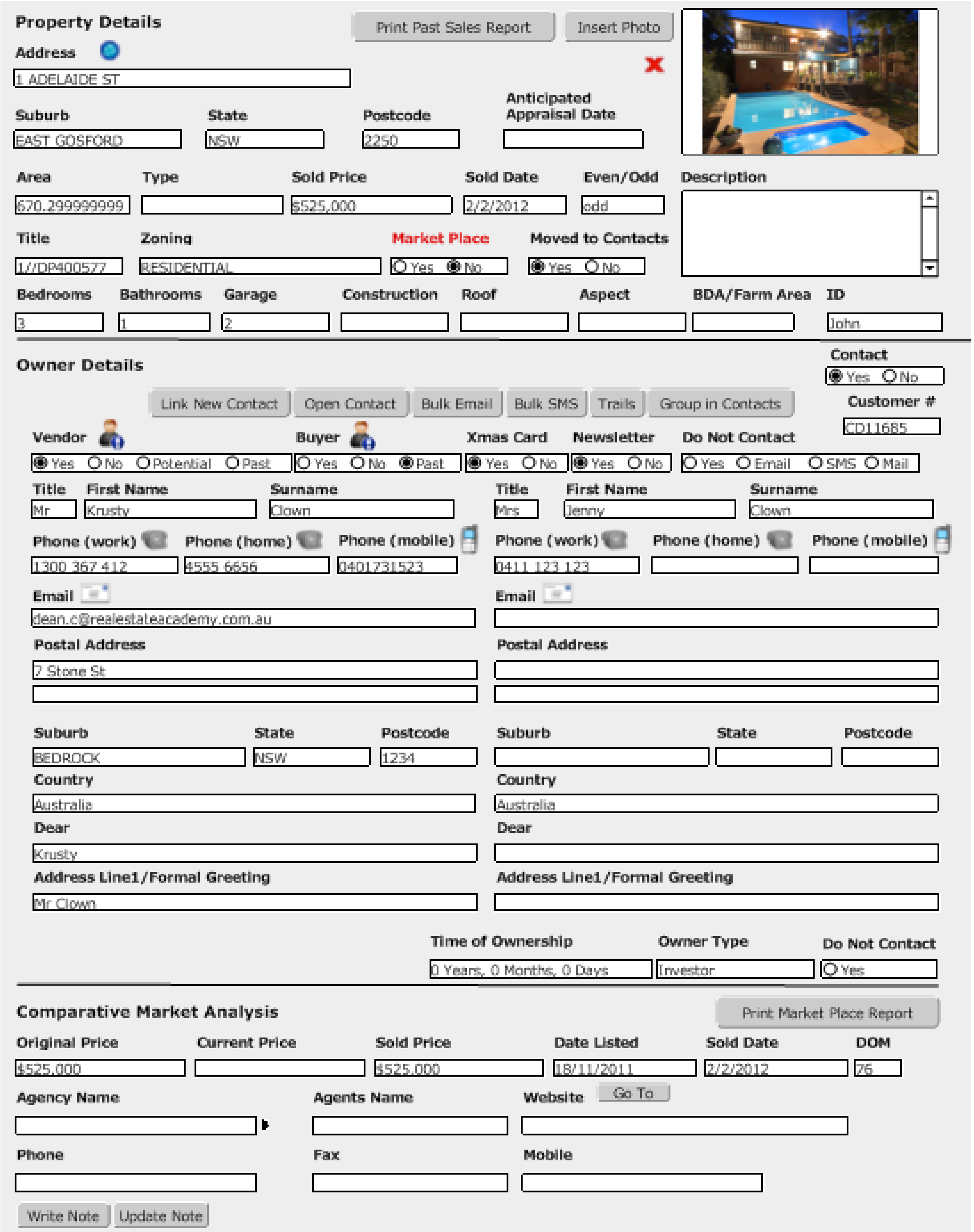
LOCAL MARKET REPORT

Currently for Sale

PROPERTY & SUMMARY	BEDS	BATH	CAR	LIST DATE	LIST PRICE	CURRENT PRICE	PHOTO
1 ADELAIDE ST, EAST GOSFORD	3	1	2	18/11/2011	$525,000		
21 ADELAIDE ST, EAST GOSFORD RARE INVESTMENT OPPORTUNITY - BLOCK OF 6 UNITS Offered for the first time since built, with a perfect central location, stands this sensational block of 6 units presenting an extremely rare opportunity to secure the most desired piece of Real Estate in the suburb.	3	2	1	16/5/2011	$449,000	$449,000	
25 ALTHORP ST, EAST GOSFORD You Wish ... Set in East Gosford's finest street and an excellent entry point into a sought after area. This apartment provides a relaxed...	3	2	2	27/4/2011	$555,000	$555,000	

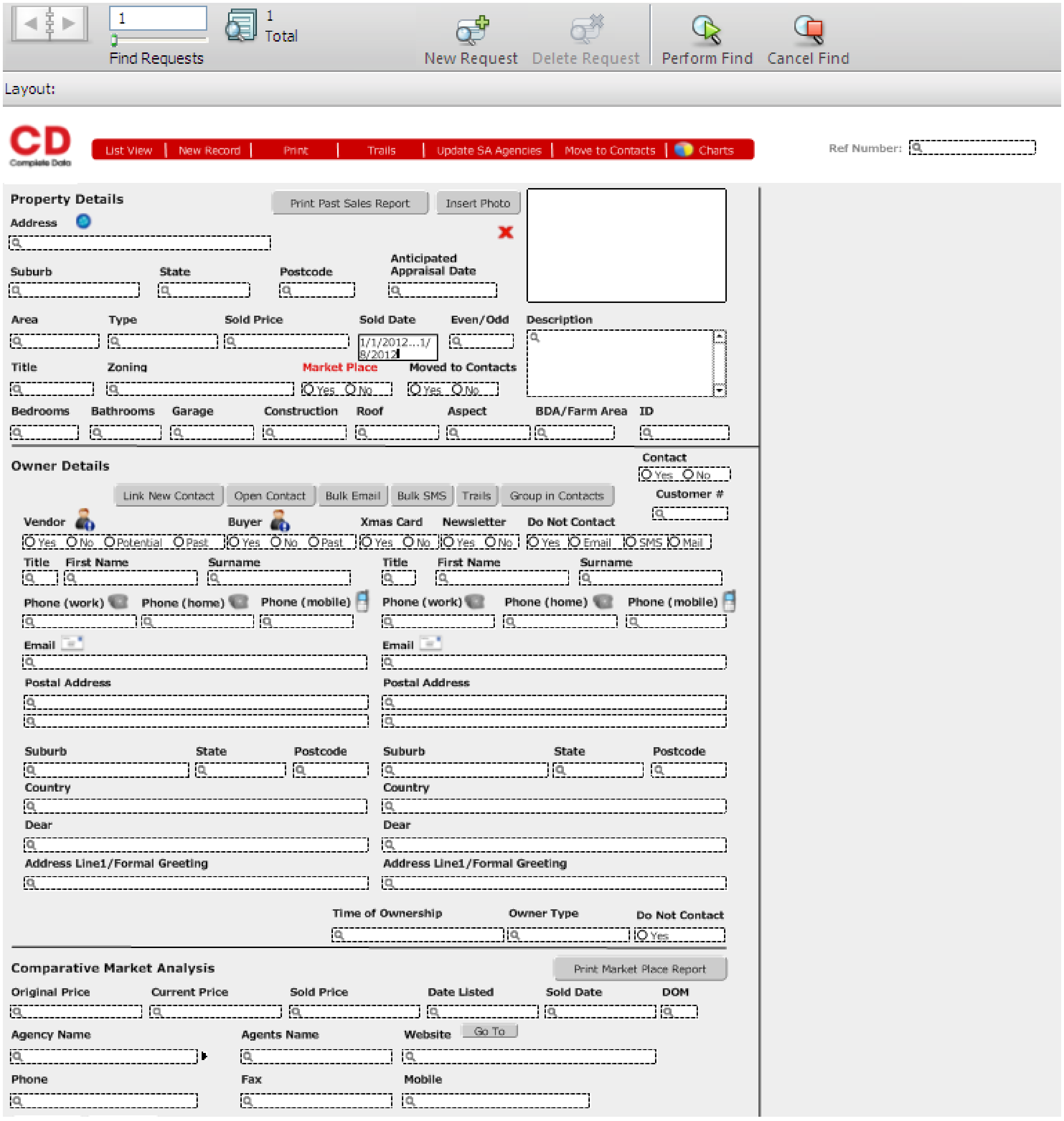
1. Go to the **Complete Data Professional** Main Menu.
2. Select the Service Area database and click the Details button for any property in the list.
3. Click the Find button. This will clear your screen and put you in Find mode.
4. In the Market Place field, select 'Yes' and press Enter (or select the grey Find button to the left of the screen). All the current listings on the market within the database will be found.
5. Go to the Comparative Market Analysis section and click the Print Market Place Report button.
6. You will see a message asking you if you wish to view photos in this report. Select 'Yes' or 'No'.
7. The Local Market Report Currently for Sale will be previewed on the screen. Click the Continue button on the left-hand side of the screen (or press the Enter key on your keyboard) and the system will ask you whether you wish to print this report select 'Yes' if you wish to print it or 'No' to return to the Service Area database. Remember to select 'records being browsed' in your printer settings.

How to mark a CMA property as sold



1. Go to the **Complete Data Professional** Main Menu.
2. Select the Service Area database.
3. Find the property you wish to mark as sold and click the Details button.
4. Complete the following fields:
5. Sold Price (at the top of the screen & also in the Comparative Market Analysis section).
6. Sold Date (at the top of the screen & also in the Comparative Market Analysis section).
7. Add a description, photo and original price (if not already completed).
8. Change the Market Place field to 'No'.

Generating a Past Sales report



You can generate a Past Sales report from the data within your Service Area database by searching for a number of different details that might be relevant to the information you are after. For example, you can search for the property address, suburb, sold price or sale date depending on your requirements.

Should you wish to search for a particular period of time you can enter a date range to search between two dates. For example, if you wished to find all properties whose sold date was between January 1, 2012 and December 31, 2012 you would enter the following into the Sold Date field when in Find mode:

01/01/2012…31/12/2012

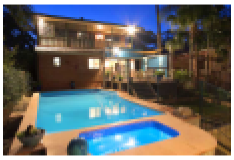
You will find when you click into the date field a pop up calendar will appear. To get into the sold date field without activating the pop up calendar click in the Sold Price field and select Tab on your keyboard. This will allow you to type a date range.

Remember to put 3 full stops between the dates (…)

You can also use the Symbols menu that appears on the top of the screen when in Find mode:

Past Sales Report

LOCAL MARKET REPORT
Recent Sales

PROPERTY & SUMMARY	BEDS	BATH	CAR	SOLD DATE	SOLD PRICE	PHOTO
1 ADELAIDE ST, EAST GOSFORD	3	1	2	2/2/2012	$525,000	

An example when this feature is useful is if you are searching for a range of sold prices, e.g. greater than or equal to > $400,000,

To generate a Past Sales report:

1. Go to the **Complete Data Professional** Main Menu.
2. Select the Service Area database and click the Details button for any property in the list.
3. Click the Find button. This will clear your screen and put you in Find mode.
4. Enter your Find criteria and press Enter (or select the grey Find button to the left of the screen). All properties matching your criteria will be found.
5. Go to the Property Details section and click the Print Past Sales Report button.

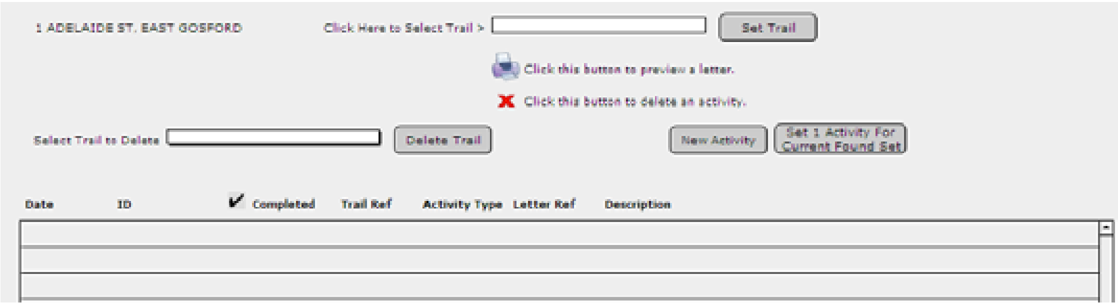
A message will appear asking you if you wish to view photos in this report. Select 'Yes' or 'No'.

1. The Local Market Report Past Sales will be previewed on the screen. Click the Continue button on the left-hand side of the screen (or press the Enter key on your keyboard) and the system will ask you whether you wish to print this report click 'Yes' if you wish to print it or 'No' to return to the Service Area database. Remember to select 'records being browsed' in the printer settings.

Service Area Trail

Complete Data Professional comes standard with one sample service area trail TC013 Service Area Sample Trail. You will first need to modify this trail or create your own additional service area trails before you can commence setting trails within the Service Area database. How to customise trails is covered in chapter 4 of this guide - Customising your System.

To set a trail against a property in the Service Area database:



1. Go to the **Complete Data Professional** Main Menu.
2. Select the Service Area database.
3. Locate the property you wish to set a trail against (alternatively you can use the Find button to search for the property if it doesn't appear in the list) and click the Details button.
4. Select the red Trails button.
5. Click in the field to the left of the Set Trail button and you will be shown a list of all the service area trails in your Trails database.
6. Select the required trail from the list and click the Set Trail button.
7. You will be prompted to select the starting data for this trail using the pop-up calendar. Select your required starting date.

Complete Data Professional will create the activities for the trail and set them against the selected property. Once you have set the trail you can make any changes required (e.g. changing the date for any activities or changing the person assigned to each activity). The ID for each activity will reflect the ID that has been entered into that trail in the Person column. Leaving this column blank will assign the activity to the person setting the trail by default. The ID can be changed by selecting a different ID from the drop-down list.
To delete an activity, simply click the red X button to the right of it.

Viewing Prospecting Tasks

Once you have set trails and activities against properties within the service area, it is vital you get used to checking which tasks are due each day.
You will recall that every activity for all trails that have been set is stored within the Scheduled Tasks database.

To view your service area prospecting tasks:

1. Go to the **Complete Data Professional** Main Menu.
2. Click the Scheduled Tasks button. Any regular tasks with your ID and which are due today appear in the list.
3. To view all prospecting tasks set against properties within the Service Area database, click the red My Prospecting button.
4. To mark a task as having been completed, click the tick box. This will put a green tick in the box to indicate it has been done. It will also change the Due Date to today's to show the date that the task was actually completed.

Tracking Performance

Provided you have been entering and maintaining your data using the Comparative Market Analysis section within the Service Area database, a number of reports are available to you that will allow you to compare your performance against other agents in your area:

Agency Report

Complete Data - Service Area Report by Agency

Agency:	No Sold	$ Sold	% Sold
	0	$627,500	0.00%
Amadeus Realty Terrigal	1	$245,000	1.59%
Belle Property - Terrigal	1		1.59%

1. **Agency Report** compares properties in your found set and shows the total number sold for each agency, the total $ value sold and the market share percentage.

To print the Agency report:
1. Go to the **Complete Data Professional** Main Menu.
2. Select the Service Area database and click the Details button for any property in the list.
3. Click the Find button. This will clear your screen and put you in Find mode.
4. Enter your Find criteria and press Enter (or select the grey Find button to the left of the screen). For example, you may wish to find all properties sold within the last 6 months or in a particular suburb. All records matching your Find criteria will be found.
5. From the Scripts menu at the top of the screen select the create agency report for current found set and the selected report will be previewed on the screen.
6. Click the Continue button on the top right side of the screen (or press the Enter key on your keyboard) and the system will ask you whether you wish to print this report select 'Yes' to print or 'No' to return to the Service Area database.

Agency Price Report

Complete Data - Service Area Report by Agency/Price

Agency:	High Price	Low Price	Average Price
	$375,000	$252,500	$313,750
Amadeus Realty Terrigal	$245,000	$245,000	$245,000

1. **Agency Price Report** compares properties in your found set and shows the highest, lowest and average price for each agency.

To print the Agency Price Report:
1. Go to the **Complete Data Professional** Main Menu.
2. Select the Service Area database and click the Details button for any property in the list.
3. Click the Find button. This will clear your screen and put you in Find mode.

4. Enter your Find criteria and press Enter (or select the grey Find button to the left of the screen). For example, you may wish to find all properties sold within the last 6 months or in a particular suburb. All records matching your Find criteria will be found.
5. From the Scripts menu at the top of the screen select the create agency price report for current found set and the selected report will be previewed on the screen.
6. Click the Continue button on the top right side of the screen (or press the Enter key on your keyboard) and the system will ask you whether you wish to print this report select 'Yes' to print or 'No' to return to the Service Area database.

Agency Average Market Time Report

Complete Data - Average Time on Market

Agency:	Average Time on Market (days)
	0.0
Amadeus Realty Terrigal	181.0
Belle Property - Terrigal	363.0
Bensville Real Estate	154.0
Boutique Real Estate	225.0
Central Coast Prestige Propertie	475.0

1. **Agency Average Market Time Report** compares properties in your found set and shows the average days on the market for each agency.

To print the Agency Average Market Time Report:
1. Go to the **Complete Data Professional** Main Menu.
2. Select the Service Area database and click the Details button for any property in the list.
3. Click the Find button. This will clear your screen and put you in Find mode.
4. Enter your Find criteria and press Enter (or select the grey Find button to the left of the screen). For example, you may wish to find all properties sold within the last 6 months or in a particular suburb. All records matching your Find criteria will be found.
5. From the Scripts menu at the top of the screen select the create Agency Average Market Time Report for current found set and the selected report will be previewed on the screen.
6. Click the Continue button on the top right side of the screen (or press the Enter key on your keyboard) and the system will ask you whether you wish to print this report select 'Yes' to print or 'No' to return to the Service Area database.