

QUICK GUIDE TO ONESURVEY

Selling Agent

Hello!

Welcome to our quick tour around the Onesurvey site. If you would prefer some training then just give us a call and we can arrange a visit.

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Quick Guide to Onesurvey

The first time you login to the new Onesurvey site it will look very different but you'll soon find it's much easier to navigate around.

Login

Login to www.onesurvey.org

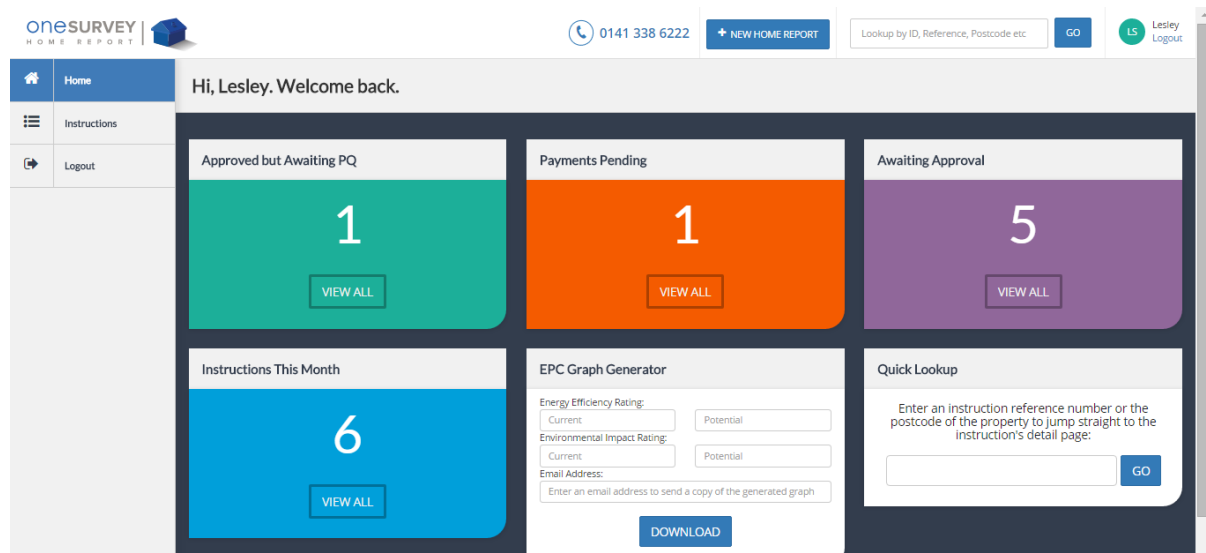


Your login page appears – enter the same username and password you used for the old system



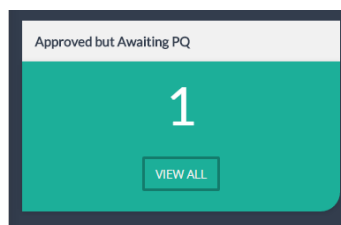
Dashboard

You now should have a dashboard appear – The dashboard allows you to see instructions that are waiting for something to happen before they can be made live – Let's look at the different areas individually...

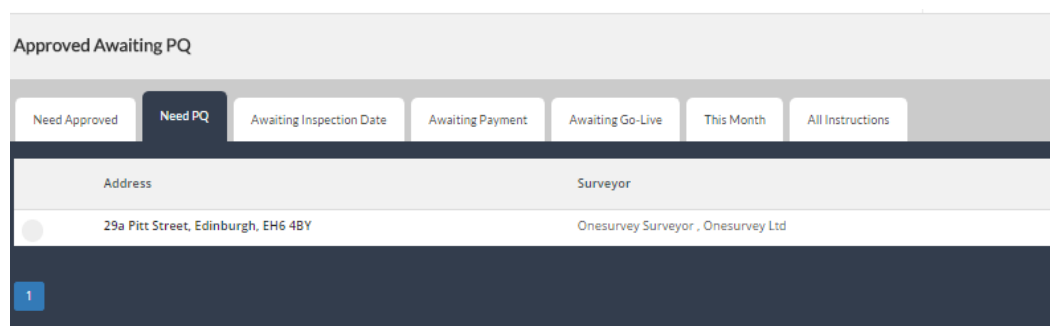


Approved but awaiting PQ

The first box tells you how many instructions are – in this example there is 1.



You would click on 'view all' and the instruction would appear as below – ***This would list all instructions approved but awaiting pq***



When you click on the instruction the following will appear:

Details Tab

You will now see the following information:

- i) [Comments box](#) – you, the surveyor and Onesurvey can add and read comments. Onesurvey will update this area when they are chasing approval.
- ii) [Edit Property Details](#) in ‘Instruction Actions’ allows you to edit
- iii) [Edit Owner Details](#) in ‘Instruction Actions’ allows you to edit
- iv) [Archive Instruction](#) allows you to remove the instruction from the system
- v) [Hide from public search](#) allows you to hide the home report from the live site at any time.
- vi) [Choose Property Image](#) allows you to upload your own photograph if you do not want to use the photo taken by the surveyor

To view the documents for this instruction click on:

Documents Tab

Document	a)	Last Update	b)	Status	c)	Actions	d)	Uploads	e)	f)	Review	g)	History
Single Survey		25/11/2015 13:30:48		Approved							VIEW		VIEW
Mortgage Certificate		25/11/2015 13:32:12		Final							VIEW		VIEW
EPC		25/11/2015 13:32:56		File Uploaded		FINALISE		-			VIEW		VIEW
Property Questionnaire				Awaiting Document		EDIT FORM		SELECT PDF...	UPLOAD				
Additional Documents				Awaiting Documents		FINALISE		SELECT FILE...	UPLOAD				

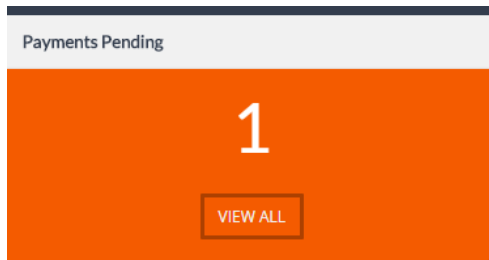
You will now see the following information:

- a) [Name of Document](#) i.e. Single Survey, EPC etc
- b) [Last Update](#) This tells you when the document was last updated (view ‘History’ for more detail)
- c) [Status](#) This is the status of the document – work in progress; approved etc
- d) [Actions](#) What needs to happen to complete a document (in this case the ‘property questionnaire’ need completed)

- e) [Uploads](#) allows a PDF document to be uploaded
- f) [Review](#) allows you to read the documents
- g) [History](#) gives a breakdown of the compilation of the documents/report – The '[History Tab](#)' also shows a complete history of what happened when and by whom

Back to [Dashboard](#) now and on to the next box:

Awaiting Payment



You would click on 'view all' and the instruction would appear as below – ***This would list all instructions awaiting payment – These are instructions were you have requested Onesurvey to collect payment from the client***

Need Approved
Need PQ
Awaiting Inspection Date
Awaiting Payment
Awaiting Go-Live
This Month
All Instructions

Address	Surveyor	Last Updated	Status
27 Pitt Street, Edinburgh, EH6 4BY	Onesurvey Surveyor	25 Nov 2015 14:28	Awaiting Payment (20) Status: Pending

When you click on the instruction, you can immediately see what is happening with the payment as Onesurvey will always leave an update

Comments

LS

Enter your comment

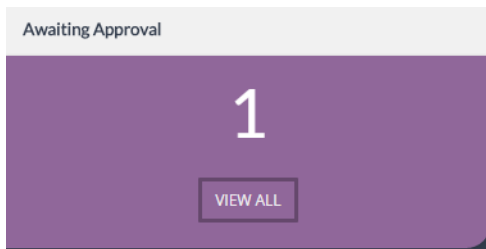
25 Nov 2015 20:45

LS

Client will call back re payment this afternoon

Back to [Dashboard](#) now and on to the next box:

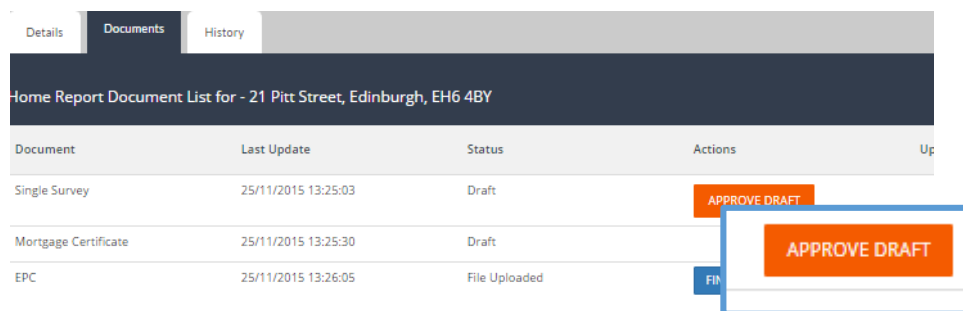
Awaiting Approval



Click on 'View all' and then the 'instruction' as before – this time you need to click on the 'documents' tab

On the single survey you now have the option to:

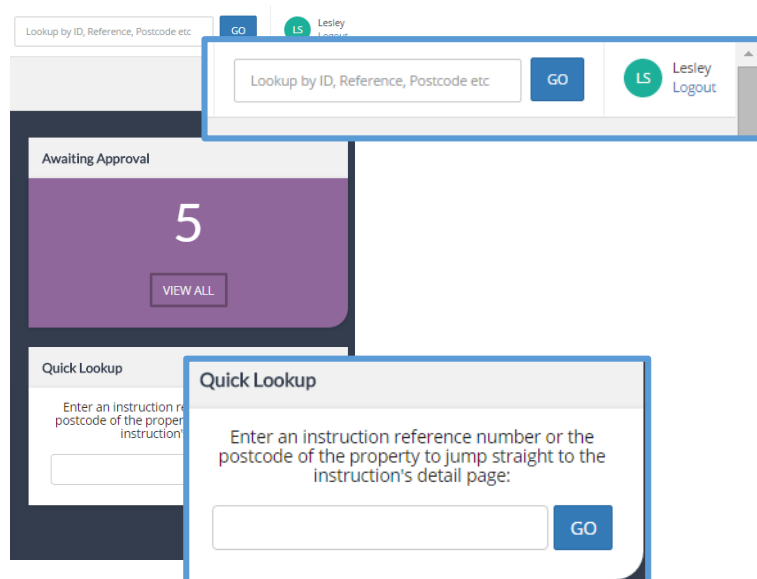
[Approve draft](#) - This can be done on behalf of your seller if you have permission



More you can do on the Dashboard:


[Find a report quickly](#)

There are 2 areas on your dashboard where you can search for a report. You can search using postcode or partial address – this will bring up all properties that match the search or you can be specific. **TIP: Always remember to clear your search once you have found the property**



Instructing a Home Report


To instruct a home report, click on **'+ New Home Report'** button – This is situated at the top of every page.

 0141 338 6222

+ NEW HOME REPORT

Lookup by ID, Reference, Postcode etc

GO

 Lesley Logout

Page 1 Details – is broken down into sections

Property to be inspected

Property to be Inspected

Find Address

Address Line 1 *

Address Line 2

Address Line 3

Town/City

Postcode *

Is this an Executory Case? ☒

Executor Name

Correspondence Address

☒ Same as Property to be Inspected

Address Line 1 *

Address Line 2

Address Line 3

Town/City

Postcode *

1. Use the **'address finder'** by entering the postcode of the property being sold
2. If the correspondence address is different from the property being sold then untick **'Same as property to be inspected'**
3. **'Is this an Executory Case'** should be ticked if the name/s of the executor/s is known. This will avoid emails being sent in the name of the deceased

Owner Details

Primary Seller Contact Details

☒ Seller does not have email access

Email *

Title *

First Name *

Surname *

Main Telephone

Mobile

Work

2nd Seller details (Optional)

Email

Title

First Name

Surname

Main Telephone

Mobile

Work

4. 'Seller does not have email access' should be ticked if there is no email address for the seller – This defaults to Onesurvey who will then post out the PQ and draft for approval
5. There is an option to put a second seller – useful for separations, power of attorney etc.

Property Details

6. There are a series of dropdown boxes with choices on style of property to number of bedrooms
7. The notes section means you can alert the surveyor or Onesurvey to any relevant information not already provided
8. There is an opportunity to upload a property image at this stage

Surveyor Details

9. Chosen surveyor will show here. The drop down box allows you to choose which surveyor you want to use. Your preferred surveyor will always be shown first.
10. Click next step for the final step of the instruction

Confirm Details

21 Pitt Street, Edinburgh, EH6 4BY (Ref ID: 63317 / 0)

EDIT DETAILS

Status : Incomplete (No Payment Method)

Created On : 26/11/2015 09:22:55

Property Details

Property Type : Flat

Style : Purpose Built

Bedrooms : 3

Estimated Selling Price (£) (if known) : 300,000

Fee Scale (£) : £300,001 - £400,000

Access Arrangements : Access through Seller

Notes : Don't let the cat out

Comments

LS

Enter your comment

26 Nov 2015 09:24

LS

Seller will pay online

Owner Details

EDIT

Primary Seller

Name : Lord Alan Sugar

Main Telephone : 0101 220 3333

Email : info@onesurvey.org

Work : 0101 220 3333

Surveyor Details

Onesurvey Surveyor

Telephone : 0141 338 6222

Email : info@onesurvey.org

Agent Details

Lesley Soddors (ABC Agents)

Telephone : 01413386222

Email : sharri@onesurvey.org

11. Check all details are correct. You can add any last minute instruction in the **'comments box'** if applicable

Choosing a payment method

☐ Please confirm that you have read and agree to the [terms and conditions](#). If you are an agent you are confirming that your client has agreed to the terms and conditions.

PAY ONLINE

You will be redirected to SagePay where the full amount can be paid by Credit/Debit card.

ONESURVEY TO COLLECT

Onesurvey will contact the seller to take payment

Pay Online

This takes you to a secure payment gateway, Sagepay, where you can input the sellers card details while they are with you. **PLEASE NOTE: There is a 2.5% surcharge for a credit card but NO charge for a debit card**

Onesurvey to Collect

When you choose Onesurvey to collect the instruction will move to 'awaiting payment'

Need Approved	Need PQ	Awaiting Inspection Date	Awaiting Payment	Awaiting Go-Live	This Month	All Instructions
Address	Surveyor	Last Updated	Status			
21 Pitt Street, Edinburgh, EH6 4BY	Onesurvey Surveyor	26 Nov 2015 09:41	Awaiting Payment (OSL Collect Payment)			

PLEASE NOTE: You cannot move forward with payment until the 'Terms and conditions' have been agreed

- ☐ Please confirm that you have read and agree to the [terms and conditions](#). If you are an agent you are confirming that your client has agreed to the terms and conditions.
Please accept the terms and conditions before continuing

Using the Tabs

You will notice each time you search for an instruction a choice of tabs appear:

Need Approved	Need PQ	Awaiting Inspection Date	Awaiting Payment	Awaiting Go-Live	This Month	All Instructions
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- The tab you are in will always be the highlighted.
- Each tab is self-explanatory – 'All instructions' is all the instructions you currently have 'Live' on the system – See below

Need Approved	Need PQ	Awaiting Inspection Date	Awaiting Payment	Awaiting Go-Live	This Month	All Instructions
Address	Surveyor	Last Updated	Status			
3/2 326 West Princes Street, Glasgow, G4 9HA		15 May 2015 12:07	Incomplete (No Payment Method)			
1190 Argyle Street, Glasgow, G3 8TE	Glasgow North - Allied Surveyors Scotland Plc	16 Apr 2015 03:34	Incomplete (No Payment Method)			
1190 Argyle Street, Glasgow, G3 8TE	Glasgow Cent Plc		No Payment Method)			
21 Pitt Street, Edinburgh, EH6 4BY	Onesurvey Surveyor	26 Nov 2015 09:41	Awaiting Payment (OSL Collect Payment)			
131 Main Street, Uddingston, Glasgow, G71 7EN	Onesurvey Surveyor , Onesurvey Ltd	24 Apr 2015 02:44	Live			

You can sort each column by clicking on the 'column name'

Instruction Actions

There is an '**Instruction Actions**' button on the 'Details' tab of every instruction. This allows you to do many things with that instruction dependent on the 'status'

Details Documents Download History History

Instruction Details (Ref ID: 10888 / 58854)

Status : Live
Payment Method : Cash
Fee Scale (£) : £0 - £100,000
Created On : 14/04/2015 15:15:29
Allocated To : Onesurvey Ltd (Onesurvey Surveyor)
Inspection Date : 17 April 2015 | 24 April 2015

Property Details
Property Type : House

Comments
Enter your comment
LS
14 Apr 2015 15:58

INSTRUCTION ACTIONS

- Edit Property Details
- Edit Owner Details
- Archive Instruction
- Hide from Public Search
- Download Home Report
- Instruct Replacement

Most of the instruction actions have been explained in the '[Details Tab](#)' but you have 2 new actions:

Download Home Report

This allows you to download a PDF of the live home Report. You can also download the home report from the 'documents tab' once a report is live. – see below

Documents Download History History

Report Document List for - 131 Main Street, Uddingston, 71 7EN

DOWNLOAD HOME REPORT

Who has downloaded a copy?

Details Documents Download History History

Downloads

On	By	Email	Telephone
26 Nov 2015 12:02	Maillie the cat	maillie@catsworld.com	0141 335 3355

This allows you to see the contact details of anyone interested in the property who has downloaded a copy of the home report

Using the smartlink

Every property has a unique smartlink that you can drop into the description area of your website and it will take interested parties straight to the download page for the home report

Smartlink (click and press
Ctrl+C to copy link)

: <https://ketchuponesurvey.azurewebsites.net/Pdf/HomeReport?q=87e4k1x%2b13iQDW4Texccyw%3d%3d>

NOTE: No-one can download a copy without inputting their details as it is delivered to their mailbox

Need Support?

Always remember the Onesurvey Team are on hand to help, simply contact us –

By phone: 0141 338 6222

By Email: info@onesurvey.org