



## *Welcome...*

Thank you for your interest in the BaySoft ASP System for Estate Agents.

### **I'm a busy Estate Agent. My time is scarce, why should I bother reading this document?**

- This document is concise. It will present you with the facts you need to know, quickly and accurately. No waffle, guaranteed.
- The BaySoft system could make a big difference to your bottom line.
- The BaySoft system will improve your efficiency.
- Many of your competitors have already made the switch to Internet based technology, and are reaping the benefits.
- If you are using older technology then you are missing out on great new features and efficiency savings and are probably paying over the odds.

**Take a look... you won't be disappointed**

If you would rather speak with one of our friendly and helpful members of staff then please call us on

***01792 79 111 5***





# Table of Contents

**WELCOME... 1**

    I'M A BUSY ESTATE AGENT. MY TIME IS SCARCE, WHY SHOULD I BOTHER READING THIS DOCUMENT? ..... 1

*Take a look... you won't be disappointed* ..... 1

**TABLE OF CONTENTS ..... 2**

**SYSTEM OVERVIEW ..... 3**

    WHAT IS THE BAYSOFT ASP SYSTEM FOR ESTATE AGENTS?..... 3

    WHAT TECHNOLOGY DOES THE SYSTEM USE?..... 3

    WHAT DOES IT COST? ..... 3

**SYSTEM FEATURES MATRIX ..... 4**

*General System Features* ..... 4

*Sales & Marketing Module* ..... 4

*Property Record Features*..... 6

*Intranet Module*..... 6

*Letting Accounts Module*..... 6

**PRICING ..... 6**

    OPTION 1 – SINGLE USER SYSTEM ..... 6

    OPTION 2 – TWO USER SYSTEM..... 6

    OPTION 3 – THREE OR MORE USERS ..... 6

    LETTINGS ACCOUNTANCY PACKAGE ADD-ON ..... 6

    OPTIONAL EXTRAS ..... 6

**HELP AND SUPPORT ..... 6**

    WHAT HAPPENS WHEN I GET STUCK? ..... 6

    HOW IS MY SYSTEM KEPT UP TO DATE?..... 6

    WHAT HAPPENS TO MY DATA IF I WANT TO LEAVE?..... 6

**HOW TO GET STARTED ..... 6**

    A SYSTEM WALK-THROUGH ..... 6

    14 DAY, NO OBLIGATIONS, FREE TRIAL ..... 6

    SETTING UP A LIVE BRANCH..... 6

**WEBSITES..... 6**





## *System Overview*

### **What is the BaySoft ASP System for Estate Agents?**

The BaySoft ASP System for Estate Agents is a very powerful, yet simple to use software package that facilitates Estate Agents in all aspects of property marketing and running of the back office. Each element of the system has been designed and tested with the following principles in mind:

- Is it powerful enough to perform the task?
- Is it simple to use?

### **What technology does the system use?**

The system makes use of the latest Microsoft technology, ASP.NET 2, served by top-of-the range Intel servers via IIS 6.

The system runs in the popular, free and readily available Internet Explorer 7, as supplied by Microsoft.

The system is served from our dedicated PIPEX servers, located in the PIPEX data-centre in the London Docklands. The servers are fully secured and backed up. This means that your data is always safe and secure.

The database behind the system is the super-fast and reliable Microsoft SQL server 2000 platform.

### **What does it cost?**

Because our system is so well written, we have very low support costs. This means that we can pass these savings on to you. We have the best feature to cost ratio in the UK!

Pricing starts from as little as £25 per month per branch!

We don't believe in hidden charges. A full price list can be found at the end of this pack.

You do not purchase our system; you simply rent it from us on a monthly basis while you wish to continue using it.





## System Features Matrix

Look and see just how powerful the BaySoft ASP System for Estate and Letting Agencies is. There is a good chance that your current solution delivers a *fraction* of these features at *many times* the price!

	Sales & Marketing	Lettings Accounts	Intranet
<b>General System Features</b>			
<b>Context-Sensitive, Online Help With Video Tutorials.</b> Simply press F2 on any screen in the system for help on that screen. The help system is constantly evolving and being refined to ensure that it delivers the standard of support that our customers expect.	✓	✓	✓
<b>Sales &amp; Marketing Module</b>			
<b>Job Book.</b> The Job Book allows you to book appointments for Market Appraisals, Valuations and other work that could be carried out by a surveyor. Record the findings of your visit on the job book in anticipation of winning the rights to market the property. Your appraisal record will form the foundation of your property listing, which eliminates the need to re-key property particulars.	✓		
<b>Property Search.</b> Find properties quickly by simply typing part of the address and pressing "Enter".	✓	✓	
<b>Job Search.</b> Find jobs quickly by simply typing part of the address and pressing "Enter".	✓		
<b>Applicant search.</b> Find / Create applicants quickly by simply typing part of their name or address.	✓		
<b>New Property Wizard.</b> Functionality includes: <ul style="list-style-type: none"> <li>• Create a new property from scratch,</li> <li>• Create a new property from a job (appraisal / valuation)</li> <li>• Clone / duplicate another property</li> <li>• Re-classify a property to a new type (e.g. sales → lettings)</li> </ul>	✓		
<b>New Appraisal Wizard.</b> Create new appraisal appointments quickly with this user-friendly wizard.	✓		



	Sales & Marketing	Lettings Accounts	Intranet
<p><b>List all Properties.</b> This powerful screen facilitates the listing of your active or archived property portfolio in a grid. You can sort and filter your data. Possible actions from this screen are: Print a property. View a property. Browse all properties (this feature is excellent if you have an applicant sat with you). Un-archive a property.</p>	✓		
<p><b>List all jobs.</b> List all of your jobs (appraisals / valuations) in a grid. Filter your results and open up job cards.</p>	✓		
<p><b>List all applicants.</b> This powerful screen allows you to list your Applicants (Buyers) in a grid. Features include:</p> <ul style="list-style-type: none"> <li>• Sort data</li> <li>• Filter by general applicant details</li> <li>• Filter by applicant matching preferences (e.g. "only show me applicants that are looking for a sales property in Newark, with 3 or more bedrooms and an upper price range of 195000 to 220000)</li> <li>• Mail merge</li> <li>• View applicant card</li> <li>• Create / Edit matching preferences</li> </ul>	✓		
<p><b>Comprehensive Contact Records.</b> The system boasts an advanced contacts management system (CMS) including a standard search facility. The CMS ensures that contacts (applicants, sellers, solicitors, landlords, etc.) don't get duplicated in a busy office. If Mr Jones is an applicant and then becomes a vendor then his contact card would have an "applicant" tab and a "vendor" tab, with his general contact information shared between both. Full Correspondence and Note Logging facilities are included, along side multi-media correspondence capability.</p>	✓	✓	✓
<p><b>List of Current Sales Progressions.</b> Sales progressions are listed by solicitor for easy, convenient one-click management.</p>	✓		
<p><b>Multi-listings.</b> Share limited property data, if you so choose, with your competitors and view theirs in return. All information which could identify the exact property / vendor are hidden from your competitors, providing you with a secure way to earn commission from seller / buyer referrals</p>	✓		
<p><b>My Diary.</b> View and print all of your appointments and blocked off time, with full relevant contact details and addresses. Never double-book a negotiator, property or applicant again due to intelligent diary analysis.</p>	✓		



	Sales & Marketing	Lettings Accounts	Intranet
<p><b>My Tasks.</b> Set tasks and reminders for your self or any other person in the office. These include letters, telephone calls, meetings, viewings to arrange and handouts to print. Link actual contact records to tasks to avoid confusion. The Home page of the system will always remind you of "today's appointments". Tasks can be set-up as one-off items or with a recurring schedule.</p>	✓		
<p><b>Comprehensive Review System.</b> Set up one-off or recurring reviews for Buyers, Properties and Sales Progressions. Assign review responsibility to specific individuals. Run a tight ship, and keep your Buyer book clean, your sellers happy and your sales running smoothly.</p>	✓		
<p><b>Movement Log.</b> See all of your office activity between two dates, and keep fully abreast of how your business is progressing.</p>	✓		
<p><b>Office Diary.</b> See what all of your negotiators are doing and where they are at a glance. This diary boasts printable day, week and month views, which can be filtered by person. The office cover rota (managed under the admin console) can also be viewed from here.</p>	✓		
<p><b>Property Matching Routine.</b> Rapidly match your buyers with your property portfolio for efficient marketing and faster selling.</p> <ul style="list-style-type: none"> <li>• Match all properties to all buyers.</li> <li>• Match one property to all buyers.</li> <li>• Match one buyer to all of your properties</li> </ul> <p>Then, market by browse-sheet, email or SMS. Your marketing will never be wasted, as the system will prompt you to follow up any applicants that you have marketed to, allowing you to book viewing appointments with a couple of clicks.</p>	✓		
<p><b>Property Advertising.</b> Keep track of which properties should be advertised in which publications and when. Keep track of costs.</p>	✓		
<p><b>Referral management.</b> Keep track of your solicitor and mortgage referrals, and which commissions have been paid.</p>	✓		
<p><b>Sales Board Management.</b> Keep track of which sales boards need to be erected, taken down or updated. Automatically notify your Sign-board company of a new action requirement by email.</p>	✓		
<p><b>Slideshow.</b> Why not run a carousel of your properties on a window-projection or even use your inactive PCs.</p>	✓		



	Sales & Marketing	Lettings Accounts	Intranet
<b>Reports.</b> A very comprehensive list of quality reports allows you to manage your agency efficiently and effectively, putting the information you need at your fingertips.	✓	✓	
<b>Conveyancing.</b> Get conveyancing quotes from Easier2Move for your clients. Earn commissions of £100 on a sale and £100 on a purchase!	✓		
<b>Branch Overview.</b> The branch overview displays valuable statistics at a glance (such as number of active and archived applicants and properties, by type) as well as a comprehensive, printable list of any issues found with your property particulars data.	✓		
<b>Bulk Image Upload.</b> Send multiple image files to our server at once using this powerful tool. Images are scaled down to an Internet friendly size, whilst maintaining photographic quality, before being uploaded to our servers.	✓		
<b>Marketing Follow-up.</b> Never forget to follow up on property particulars you have sent out again. A convenient interface allows you to rapidly contact buyers to query levels of interest, and contact sellers to arrange viewings. Arrange viewings on specific properties at the click of a button.	✓		
<b>Contracts Expiring This Month.</b> This clever widget alerts you to any contracts that have expired, or will be expiring during the next month. This will allow you to contact sellers for renewals.	✓		
<b>Mail and Messages.</b> A virus-safe internal messaging system allows members of the office or group to stay in touch. System messages will keep you informed of any important system changes. Receive notification of new applicant registrations from your website and receive applicant and seller messages directly from your website.	✓		
<b>Marketplace.</b> The marketplace lists and allows you one-click access to services that we think may be of value to you.	✓		
<b>Property Record Features</b>			
<b>Spell Check.</b> Always ensure the quality of your particulars by running the spell checker.	✓		
<b>Memo-pad.</b> See the status of the property at a glance, from appraisal stage right through to sale and commission-split stage. View summary statistics on number of offers and viewings, highest offers, advertising costs and much more.	✓		



	Sales & Marketing	Lettings Accounts	Intranet
<b>Image catalogue.</b> Manage a catalogue of images for each of your properties. Images uploaded to your catalogue can be used against the main property record and your internal room details.	<input checked="" type="checkbox"/>		
<b>Paragraphs.</b> Build up a quality description of each element/room of the property. Create standard paragraphs for rapid detail creation, attach images from the image catalogue, use the metric converter to build up your dimensions, run the spell checker to ensure quality standards and set the order your details should appear in.	<input checked="" type="checkbox"/>		
<b>Marketing.</b> Control all aspects of how and when you will market each property. Send your property to a wide range of popular property portals and advertise it on your own website. Set special SMS marketing text and choose which newspaper publications the property can be advertised in.	<input checked="" type="checkbox"/>		
<b>Viewings.</b> Arrange viewings, attended or unattended through the diary system. The system will remind you to follow up on unattended viewings for feedback.	<input checked="" type="checkbox"/>		
<b>Offers.</b> Take multiple offers on a property. Mail-merge to buyers, sellers and solicitors. Follow the whole sales process through a property audit-logged sales progression routine, trapping key dates and events.	<input checked="" type="checkbox"/>		
<b>Property Sales Progression.</b> The whole sales progression can be auditably tracked through our system, providing maximum protection and information for all involved parties.	<input checked="" type="checkbox"/>		
<b>Key Log and Management Routine.</b> Are you holding keys on behalf of your sellers? Keep track of who takes them, when they are taken and when they are returned.	<input checked="" type="checkbox"/>		
<b>Archive Routine.</b> Archive properties are no longer to be marketed, and specify why, for analytical reporting.	<input checked="" type="checkbox"/>		
<b>Seller Mail-Merge.</b> Send letters to your seller relating to their property via MS Word mail-merge, or through email.	<input checked="" type="checkbox"/>		
<b>Print Window-cards and Handouts.</b> BaySoft can design or follow a design that you supply to create professional, attractive window cards and handouts.	<input checked="" type="checkbox"/>		
<b>Property notes-log.</b> Keep an auditable log of all activity against a property. Notes cannot be deleted or edited by non administrative users.	<input checked="" type="checkbox"/>		
<b>Property activity-log.</b> This log tracks all activity linked to a property including correspondence, notes, price changes and the like.	<input checked="" type="checkbox"/>		



	Sales & Marketing	Lettings Accounts	Intranet
<b>Price Change Routine and Log.</b> All price changes are logged through this routine, tracking the old price, the new price, whom made the change and the authority on which the price change was made.	<input checked="" type="checkbox"/>		
<b>Comprehensive Sales Property Record.</b> This record contains all of the database fields that you need to create rich sales property particulars. Additional features (such as saunas, swimming pools, basements etc.) can be specified by the user, and then become available for the seller matching routine.	<input checked="" type="checkbox"/>		
<b>Comprehensive Overseas Property Record.</b> This record is tailored to marketing your overseas properties. The BaySoft system does not operate a poor "one record fits all" model.	<input checked="" type="checkbox"/>		
<b>Comprehensive Commercial Property Record.</b> This record is tailored to marketing your commercial properties and land. The BaySoft system does not operate a poor "one record fits all" model.	<input checked="" type="checkbox"/>		
<b>Comprehensive Lettings Property Record.</b> This record is tailored to marketing your letting properties. The BaySoft system does not operate a poor "one record fits all" model.	<input checked="" type="checkbox"/>		
<b>Property inspection routine.</b> This routine (only available on let properties) allows you to set up inspection schedules to keep an eye on utility meter readings and the general state of the property.	<input checked="" type="checkbox"/>		
<b>Intranet Module</b>			
If you have more than one branch then our Intranet module is a great way of tying your organisation together, sharing resources and keeping everyone interested and informed.			
<b>Address Book.</b> Find any agent / branch in your group quickly and easily. Branch and staff photos can also be utilized.			<input checked="" type="checkbox"/>
<b>Ideas board.</b> Staff can post ideas to the group / branch management for approval. Ideas and responses are displayed (upon approval) for all to see.			<input checked="" type="checkbox"/>
<b>Internal Mail System.</b> Send internal mail to anyone in your group, safely, securely and virus-free.	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>
<b>Documents &amp; Images.</b> Download group documents and images from this shared resource.			<input checked="" type="checkbox"/>
<b>Diary of events.</b> Maintain a diary of group and branch events to keep your staff interested and informed.			<input checked="" type="checkbox"/>



	Sales & Marketing	Lettings Accounts	Intranet
<b>News.</b> Post news articles of interest to your branch or group for all to read.			<input checked="" type="checkbox"/>
<b>Admin and security.</b> The BaySoft ASP system has three levels of security. <ul style="list-style-type: none"> <li>• A group manager can control group level items such as group-wide letter templates, diary items, news articles, ideas board items and welcome messages.</li> <li>• A branch manager can manager branch level items such as branch letter templates, diary events, users, passwords, SMS setup, welcome messages and power-tools. Power tools allow for bulk applicant archiving, bulk property archiving, re-assignment of sellers between users and viewing of branch security logs.</li> <li>• A standard system user and perform most system actions, but has no access to change log entries or perform other admin tasks.</li> </ul>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<b>Letting Accounts Module</b>			
<b>New tenancy setup.</b> Options include: Standard, Managed, Fee-Finders and Opening Balances (for data-import)		<input checked="" type="checkbox"/>	
<b>Recurring charges.</b> If you have recurring charges that are not related to rent then set up a charging matrix to the landlord or tenant, with or without tax with ease.		<input checked="" type="checkbox"/>	
<b>Rents &amp; Charges Due.</b> Raise any charges due to landlords or tenants at the click of a button.		<input checked="" type="checkbox"/>	
<b>Post Collections.</b> Post collections from tenants using this routine. Collections posted as "rent" will eligible for commission deductions and the like.		<input checked="" type="checkbox"/>	
<b>Clear Receipts.</b> Clear any cheques, freeing up payments for processing.		<input checked="" type="checkbox"/>	
<b>Pay Landlords.</b> Pay landlords NET of your commission and charges.		<input checked="" type="checkbox"/>	
<b>Invoices &amp; Statements.</b> Print landlord and tenant invoices and statements.		<input checked="" type="checkbox"/>	
<b>Journal Adjustments.</b> Make adjustments to your ledgers if you have made a mistake.		<input checked="" type="checkbox"/>	



	Sales & Marketing	Lettings Accounts	Intranet
<b>Repay Bonds.</b> Repay bonds that you are holding to your tenants, or part-repay them if any damage has occurred to the property. (The residual amount is credited to the Landlord)		<input checked="" type="checkbox"/>	
<b>View Ledgers.</b> This module implements a full double-entry book keeping system. View the ledgers here.		<input checked="" type="checkbox"/>	
<b>Sundry Invoicing.</b> Raise sundry invoices to tenants and landlords here. Sundry rent invoices may be raised here to allow for proper rent processing.		<input checked="" type="checkbox"/>	
<b>References.</b> Maintain a list of references for each tenant here.		<input checked="" type="checkbox"/>	
<b>Reports.</b> Comprehensive reporting allows you to track your debtors and all other aspects of your lettings operation.		<input checked="" type="checkbox"/>	





## *Pricing*

Unlike many of our competitors we are up-front about our pricing. We can assure you that all of these prices are competitive, if not the lowest in the UK. The difference is that with some of the other systems you won't get to know about some of these charges until after you have signed up.

NOTE: (all prices exclude VAT, which must be added at 17.5%)

### **Option 1 – Single User System**

£25 per branch, per month. This includes access to the Job Book, Sales, Letting, Commercial and Overseas Property Cards and all other system features.

### **Option 2 – Two User System**

£40 per branch, per month. This includes access to the Job Book, Sales, Letting, Commercial and Overseas Property Cards and all other system features.

### **Option 3 – Three or More Users**

£40 per branch, per month for the first 2 users. £10 for each additional user. This includes access to the Job Book, Sales, Letting, Commercial and Overseas Property Cards and all other system features.

### **Lettings Accountancy Package Add-On**

£50 per branch, per month.

### **Optional Extras**

Property Portal Uploads	£5 per portal, per branch, per-month
Intranet	£40 per branch, per month
Postcode / Address Lookup	£40 per branch, per quarter
Window Cards / Handouts	£50 each
Website with property search	from £499
SMS Text Messages	price depends on quantity purchased
Letter Merge Templates	£20 each
Search Plug-in for your current website	£99 one-off setup charge

Note: You can create your own Letter Merge Templates. A full tutorial is supplied.





## *Help And Support*

### **What happens when I get stuck?**

BaySoft offer three levels of support, all are supplied free of charge; our only requirement is that support is offered in this order:

1. Context-sensitive system help. You can press F2 on any screen in the system and our on-line help system will open up showing you step-by step instructions, with images, for the features of that screen.
2. If the help system does not facilitate a resolution to your problem/query then one of our friendly, helpful and patient members of staff will gladly support you over the telephone.
3. If we cannot resolve your problem over the telephone then our excellent LogMeIn™ Rescue support package will allow us to remotely connect to and control your PC. This method is almost guaranteed to resolve all problems.

### **How is my system kept up to date?**

Our servers always serve the latest version of our system directly to your PC. You will always be 100% up-to-date with the latest features and updates.

### **What happens to my data if I want to leave?**

We hope that none of our customers will ever find good reason to switch to a different solution. We would ask that you discuss your grievance with us before taking that decision. We always listen to customer concerns, and act on good suggestions that will benefit all system users.

If you do decide to leave then we will happily supply you with a copy of your data in a common format, such as CSV, Microsoft Access, Microsoft Excel or as HTML.

As custodians of your data we *may* charge you, AT COST, for exporting your data-extract. This is by no means a simple exercise, and does consume the time of our support staff.





## *How to Get Started*

### A system walk-through

We ask all enquirers to watch our system-walk through "video" before proceeding with a trial.

If you have many detailed questions to ask us about the system then we will happily undertake a down-the-wire demonstration by taking remote-control of your PC.

### 14 day, no obligations, free trial

We firmly believe that a customer has to be sure that our system is the right solution for them, before proceeding with a live set-up.

For this reason we will set you up with a "sand-box" trial branch on our demonstration server. During the 14 day trial period (which we will extend in exceptional circumstances) you will be able to log into the system as often as you like and try out all of the features.

At the end of the 14 days we will contact you to see if you have interest in proceeding.

BaySoft knows how irritating high-pressure, unsolicited sales calls are. If the system is not right for you then we would love to know why, but we will not make repeated, unsolicited sales calls to you.

### Setting up a live branch

Once you are happy that we have the right product for your Agency we can have you up and running within the hour.

Set-up considerations are:

- Supply us with your branch "logo" so that we can "brand" the system so that it looks like your own.
- Supply us with a list of users (full name and access rights (branch owner, admin user or simple system user)
- Supply us with window-card / handout designs (if required)
- Make enquiries about integration with your website or creating a new website for your branch.





## Websites

BaySoft has many years of experience delivering top-quality interactive websites on behalf of our clients. Here are some examples...

Note: The "Bernadette Murphy estates" site was not designed by us and is not hosted by us, but it does incorporate the BaySoft I-Frame, which is our smart plug-in for your website. The BaySoft I-Frame offers property search, applicant registration with matching preferences and many other features.

