

EstatePad Quick Start Guide

Settings



Click the settings icon to take you into EstatePad settings

Select “**Agent Settings**” where you can tell EstatePad your name and the email address you want your clients to see.

Navigation



In portrait mode press “Selection” in the top left corner to expose the EstatePad navigation.

Contacts



Press the “Add” icon found in the bottom left hand corner of every screen in landscape mode. In portrait mode just press “Selection” and the “Add” icon will appear in the bottom of the navigation popup.

To create an appointment for a contact press the appointment icon then add details, date and time – this will be added to the tasks page.

There are three tabs for every contact.

- Contact



- shows the contact details (phone, emails) for your clients
- assigns the categories assigned to the contact
- holds a notes field that you can enter any other notes you wish

- Match Listings



- Holds preferences your client has for property
 - Preferences include price, # bedrooms, area, estate type
- Displays all current Listings you have that match your clients preferences
- Mail Merge
 - Select match properties by ticking them
 - Press the mail contact button to automatically generate an email to your client introducing them to the properties you believe will interest them.
- You can quickly access more details about a matched listing by pressing the

listing icon

- History



- Shows you a complete history of your contact.


















Listings



Press the “Add” icon found in the bottom left hand corner of every screen in landscape mode. In portrait mode just press “Selection” and the “Add” icon will appear in the bottom of the navigation popup.

To create an appointment for a listing press the appointment icon then add details, date and time – this will be added to the tasks page.


There are four tabs for every contact.

- Listing    
 - shows the address of the listing
 - let's you assign vendor(s) and tenant(s) from your contact list
 - show's the sale method, listing agent and website for the listing
 - holds a notes field that you can enter any other notes you wish
- Match Buyers    
 - Holds listing details to help match buying clients
 - Preferences include price, # bedrooms, area, estate type
 - Displays all current contacts you have that match your listing preferences
 - Mail Merge
 - Select match properties by ticking them 
 - Press the mail contact button  to automatically generate an email to your all matching contacts and introducing them to this listing
- Viewings    
 - To create a viewing press the “Add” icon  found in the bottom left hand corner of every screen in landscape mode. In portrait mode just press “Selection” and the “Add” icon will appear in the bottom of the navigation popup. You'll be asked to give the viewing a name, date and time.
 - During the viewing you can collect the names and address of the attendees by pressing the add button 
 - You can also gather feedback from each attendee by pressing the notes icon  next to the attendees name
- History
 - Shows you a complete history of your listing.

Tasks


The tasks page is filtered based on when tasks need to be completed:

- Today
- Tomorrow
- This Week
- This Month
- Future Months
- Missed Tasks

Each filter gives you feedback about the number of task for that period  6/10 which can help you see when busy periods are coming up.

Task are also grouped into similar task types such as Calling Vendors, General Calls and Appointments.

To set a task complete just tick off the task  at it will move to the completed task area.

To create a manual task press the appointment icon  then add details, date and time – this will be added to the tasks page.