

## How to create roadmaps?

Roadmaps allow you to schedule visits to properties, connecting the agent to the potential customer.

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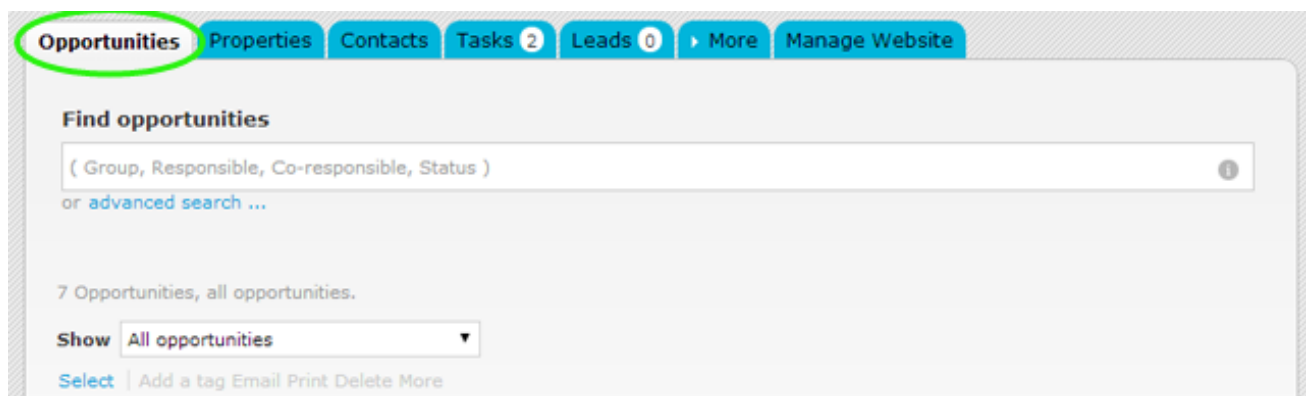
The roadmap:

- specifies which property is included in the visit with all its essential information;
- specifies the potential customer's preferences;
- commits the potential customer to being a responsible intervener in the business, by signing the document.

The roadmap is editable and easy to create.

To do so, take the following steps:

### 1. Access the 'Opportunities' tab;



2. Access an 'Opportunity' by clicking on the title;

The screenshot displays two identical opportunity cards. The top card has the title 'Sale, VEN\_10' circled in green. Below the title is the date 'Solha Custodia, 20 Jan' and a '7+' icon. The card contains the following information:

- Potential client: Agatha Hayes
- Phone: (44) 78211159932
- Email: a.hayes@yahoo.co.uk
- Property: Townhouse 3 Rooms, CAS\_10
- Location: Belfast, Down, Northern Ireland
- Availability: Sold
- For sale: £465,000

At the bottom of each card is an 'add tags' link.

3. On the right sidebar, click 'Roadmaps', then click 'add a roadmap';

The screenshot shows a software interface with a sidebar on the right. The sidebar contains several options, with 'Roadmaps' circled in green. The main area displays property details for 'Townhouse 3 Rooms, CAS\_10' in Belfast, Northern Ireland, with a price of £465,000. The sidebar options include:

- Delete this opportunity
- Create contract
- Upload template
- Mortgage Calculator
- Send by email
- Match and send mail
- Generate copy key
- Tasks (add task)
- Roadmaps (add a roadmap)
- Management of funding (To start)
- Management of CPVC (To start)
- Management of deeds (To start)

4. In the roadmap form, fill in the name for the roadmap, select the properties to visit, who's responsible, the date and time of the visit, then click 'Save';

**Add a roadmap visit**

Roadmap name:

Date of visit: 2014 Mar

Who's responsible: Julien Horta

Save Cancel

5. Your roadmap will be visible in the roadmaps section. After completing the roadmap, a property visit form is automatically created;

**Tasks** add task

**Roadmaps** add a roadmap

Visit CAS\_10 20 January edit To conclude ✓

[See visit form](#)

**Visit form** Properties Contacts Tasks Leads More Manage Website

Identification and proof of access to visit form

Person responsible: Sofia Collins Visit form: Visit CAS\_10 Date: 2014/01/20 10:50

Property: CAS\_10 Property type / Rooms: Townhouse 3 Rooms

Address: Belfast For sale: 465000 £

Net area: 135 Gross area: 0

GPS coordinates:

Potential client: Agathe Horta Desktop: Simon Gray

Phone: (040) 7021139002 Phone: (040) 4352000144

Email: a.horta@ufon.co.uk Email: sofia@ufon.com

Interested in Property

Very Interested Interested Little Interested No Interested

## 6. Edit a visit form

When you open a visit form, it is possible to edit and complete the pre-defined fields. In other sections it is possible to add additional fields;

**Identification and proof of access to visit form**

<b>Person responsible</b> Sofia Custódio	<b>Visit form</b> Ref: VF_3	<b>Date:</b> 20/01/2014 22:30
<b>Property:</b> CAS_10	Property type / Rooms: Townhouse 3 Rooms	
<b>Address:</b> Belfast	For sale: 465000 £	
<b>Net area:</b> 135	Gross area: 0	
<b>GPS coordinates:</b>		
<b>Potential client:</b> Agatha Hayes	<b>Owner:</b> Edwin Gray	
<b>Phone:</b> (44) 78211159932	<b>Phone:</b> (44) 6552000144	
<b>Email:</b> a.hayes@yahoo.co.uk	<b>Email:</b> edwingray@gmail.com	
	<b>Address:</b>	

**Interest in Property**

Very Interested  Interested  Little Interested  No Interested

Good price  Price too high

Wants to visit the property


**About business deal**

Give its opinion at a later time  You are viewing other properties

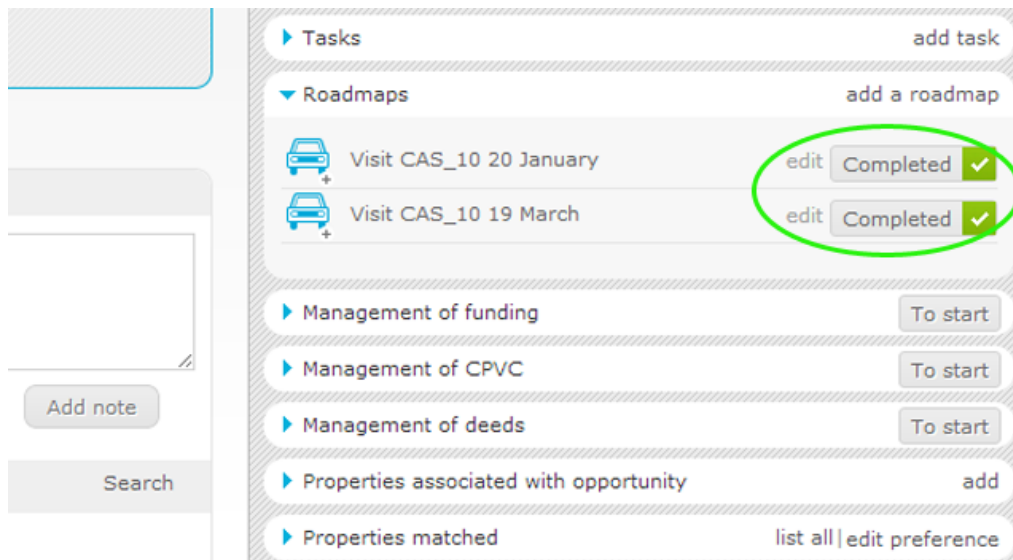
## 7. Print or send by email

You can also add comments. After completing and saving the changes, it is possible to send the visit form by email or print it;

<b>Positive points</b> <small>edit</small>	<b>Negative points</b> <small>edit</small>
<input type="checkbox"/> Acceptable areas	<input type="checkbox"/> Poor maintenance of the property
<input type="checkbox"/> Good location	<input type="checkbox"/> Small divisions
<input type="button" value="Add another"/>	<input type="button" value="Add another"/>
<b>Observations:</b>	
<input type="text"/>	
<small>The Potential Buyer acknowledges that this visit was conducted under a real estate contract between the Demo EN (Interno) and the owner, agreeing to notify the Demo EN (Interno) if he acquires the property or should he show it to third parties who are interested in its acquisition. The Owner acknowledges that the obligations assumed by the contract with the Demo EN (Interno) will be effective if he sells the property to a potential buyer and also to third parties presented by a potential buyer, regardless of the date on which the sale is achieved. The Owner and the Potential Buyer acknowledge that the failure of the obligations hereunder assumed, entail an obligation to compensate the Demo EN (Interno) for damages caused according to the general terms of civil responsibility governed by Articles number 483 and the following of the Civil Code.</small>	
<input type="button" value="Send by email"/> <input type="button" value="Print"/>	<input type="button" value="Save"/> <input type="button" value="Cancel"/>

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8. Once the visit to the property has occurred, you can complete this visit included in the roadmap previously created;



### 9. Track visits made to a property

Finally, if you access the property record you will find all records of the visit forms on the 'Visits to the property' section;



Learn more at: <http://academy.egorealestate.com/>

Questions: [support@egorealestate.com](mailto:support@egorealestate.com)