

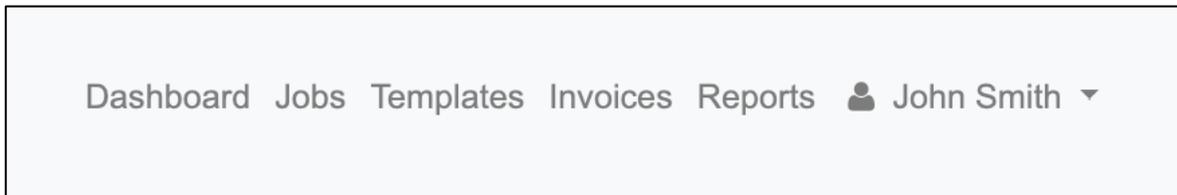


PT Portal – Additional Functionality

Thank you for signing up to and using the Property Typing Portal.

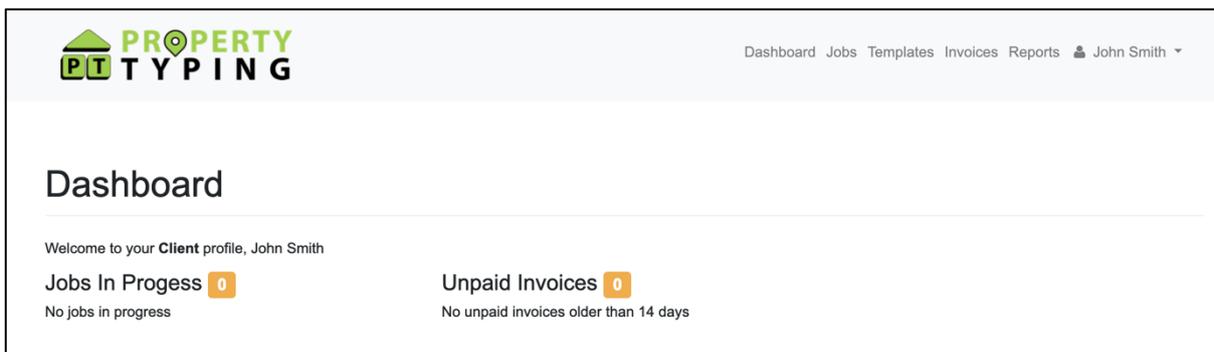
Here are a few tips on how to get the most out of this free tool.

This guide will show you how to use the various tabs available on your profile (in the menu on the top right hand side of your profile):



Your Dashboard

When you sign in, you are automatically taken to your Client Dashboard:



Here you can quickly view and navigate to:

- Any outstanding jobs and track their progress or message your typist directly.
- Any overdue unpaid invoices on your account.

Jobs

The jobs tab is where you will need to go if you want to create a new job on the portal (rather than emailing it to jobs@propertytyping.com).

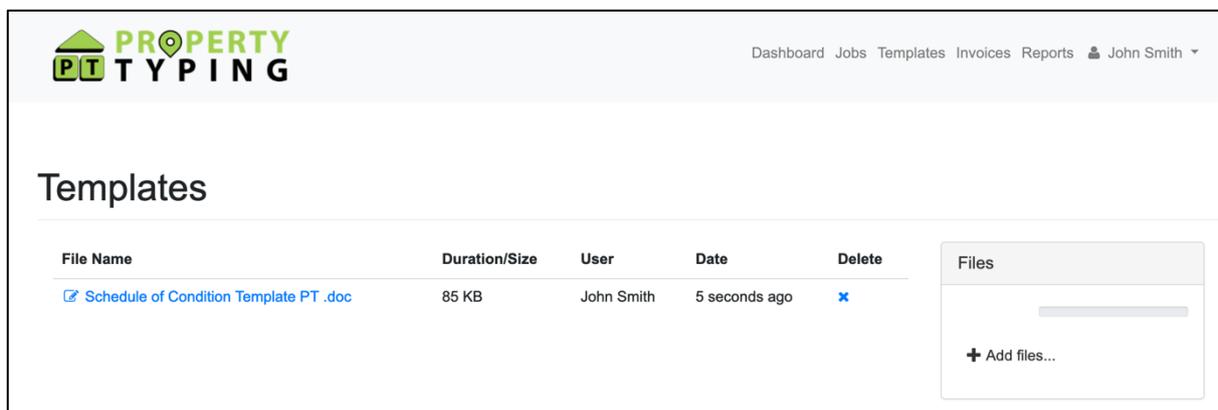
The benefits of creating a job manually using the portal are:

- Easily upload files that are too large to email
- Quickly select a saved template rather than having to email it every time you send work
- Check that the audio length seems correct when adding dictation files
- Share your login details with admin staff or a colleague who can then create jobs on your behalf
- Amend job details or files if required

Templates

Saving and keeping your report templates in one place has never been easier. Simply click 'Add files' to upload any new templates which will then be available to select when creating a job on the portal, or will be available to your typist if you confirm which one they need to use on the dictation/email.

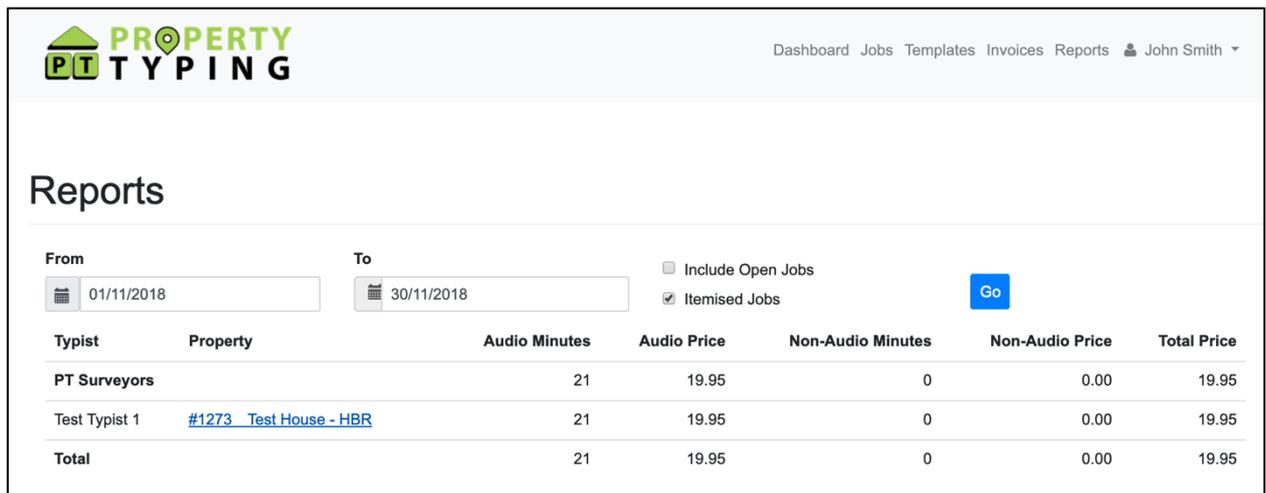
Delete any old templates from the list quickly by using the X button under 'Delete'. View the dates the templates were uploaded to make sure you are using the correct version.



File Name	Duration/Size	User	Date	Delete
Schedule of Condition Template PT .doc	85 KB	John Smith	5 seconds ago	X

Reports

When a job has been completed and invoiced, they are no longer available under the 'jobs' closed tab, but are still available to view and access using the reporting tool.



The screenshot shows the 'Reports' section of the Property Typing dashboard. At the top, there is a navigation bar with 'Dashboard', 'Jobs', 'Templates', 'Invoices', 'Reports', and a user profile for 'John Smith'. Below the navigation bar, the 'Reports' title is displayed. The main area contains a date range selector with 'From' (01/11/2018) and 'To' (30/11/2018) fields, and checkboxes for 'Include Open Jobs' (unchecked) and 'Itemised Jobs' (checked). A blue 'Go' button is positioned to the right of the date fields. Below the selector is a table with the following data:

Typist	Property	Audio Minutes	Audio Price	Non-Audio Minutes	Non-Audio Price	Total Price
PT Surveyors		21	19.95	0	0.00	19.95
Test Typist 1	#1273 Test House - HBR	21	19.95	0	0.00	19.95
Total		21	19.95	0	0.00	19.95

Simply select a date range using the 'From' and 'To' calendar selector at the top, tick itemise jobs to get a full list of the individual jobs rather than a summary total and hit 'Go'.

You can then click on the job you want to view.

The reports can also be used to check your typing spend in a certain timeframe.

User Profile

There isn't much to check here, but click on the drop down next to your name, and you can amend your billing contact name if required and see the email address you are logged in under. If you need to amend your email address or company info/address, please contact typing@property-typing.com.

Any other questions, drop me an email or a call anytime!