



COMPLETE DATA SUPPORT - WHAT'S COVERED?

COMPLETE DATA PLUS / PROFESSIONAL

Complete Data's Annual Support Subscription provides you with:

Initial Complete Data software purchase setup – once off only	Plus / Individual	Single User	Multi User
Complete Data Server Install – applies to Professional Multi-user only. Client must provide compatible operating system	No	No	Yes
Setting up Complete Data Support Files for shared drive	No	No	Yes
Setting up customised brochures for Window, Brochure, Just Listed, Just Sold – applies to Professional Single or Multi-user only	No	Yes	Yes
Adding logo and company name to standard reports	No	Yes	Yes
Data migration from previous version. Client must know what data needs to be transferred. eg Contacts or contacts, listings, scheduled tasks etc	Yes	Yes	Yes
General			
Dedicated full time support team identifying, investigating and resolving support issues	Yes	Yes	Yes
Log a ticket through Telephone, email and fax for technical support	Yes	Yes	Yes
Support coverage AEST Monday – Friday 9:00am – 5:00pm, excluding Christmas / New Year and Public Holidays	Yes	Yes	Yes
Utilising remote access technology (TeamViewer), the support team can directly log onto your computer to help with your issues fast	Yes	Yes	Yes
Self paced Training Videos online	Yes	Yes	Yes
Defined Service Level Commitments	Yes	Yes	Yes
SYSTEM			
Data recovery from server Backups	No	No	Yes
Add new or revised existing backup schedules	No	No	Yes
Installing Complete Data onto workstations – one workstation per license	No	No	Yes
Troubleshooting issues as they arise	Yes	Yes	Yes

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SETUP	Plus / Individual	Single User	Multi User
Importing service area and contacts once formatted in the correct format by the client on MS Excel spreadsheet	Yes	Yes	Yes
Creating new user accounts	Yes	Yes	Yes
Setup for sending Emails. Client must provide SMTP details	Yes	Yes	Yes
Setup for sending SMS. Client must provide SMS account details	Yes	Yes	Yes
Setting up HTML Email Signature – Client must provide HTML coding	Yes	Yes	Yes
Guidance to creating new or customising existing standard mail merge letters	Yes	Yes	Yes
Guidance to creating new or customising existing standard trails	Yes	Yes	Yes
Guidance to creating new or customising existing marketing activities and marketing campaigns	No	Yes	Yes
Guidance to creating new or customising existing SMS / Email templates	Yes	Yes	Yes

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Complete Data's Annual Support Subscription provides you with:

Support for the following functions, provided your version of Complete Data has the function:

Enquiries:

- Entering Enquiries
- Send SMS to agent on enquiries
- Send SMS to enquiry contact on property details
- Moving enquiry into contact
- Entering web enquiries

Contacts:

- Entering Contacts
- Filling in the Mandatory Fields
- Marking a Contact a Buyer and/or Seller
- Keeping record of buyer's requirements
- Keeping track of buyer by setting trails or scheduled tasks
- Entering an inspection to a buyer
- Learn how to do basic finds to contacts
- Adding / Updating contacts to MS Outlook
- Importing contacts from MS Outlook
- Sending Single SMS & Email using a template

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Complete Data's Annual Support Subscription provides you with: (continued)

Support for the following functions, provided your version of Complete Data has the function:

Contacts (cont):

- Sending Bulk SMS & Emails using a template
- Print Avery Labels and Envelopes
- Generating Lead Source report by agent and office
- Creating Testimonial
- Linking related documents
- Exporting contacts onto MS Excel sheet

Listings:

- Entering a new Appraisal
- Create a new appraisal appointment on MS outlook
- Converting Appraisal to Listing
- Enter a new Listing
- Enter Tenant Details to a Listing
- Keeping in contact with Vendors
- Entering Sales Advice
- Entering Commission Splits
- Entering Payments & Receipts
- Learn how to do basic finds to listings
- Setting up Open House Schedule
- Generating open house list
- Generating Stock sheet, Inspection, Listing and Market Place Report
- Find matching buyers based on suburb, bedrooms or price range to listing
- Set predefined SMS template for buyer enquiries
- Find all the people that have inspected a property and send bulk email or SMS
- Managing vendor call backs
- Web Upload - upload subscription required

Marketing:

- Set a marketing campaign or marketing activities to a Listing
- Marking a marketing activity paid
- Linking related documents
- Adding related photos to a listing
- Adding advertising text to a listing
- Printing brochures or save brochures as PDF

Service Area:

- Print Avery Labels and Envelopes to residence or owner
- Generating CMA - Past and Current Market Report
- Entering other agencies details
- Moving Owner to Contacts
- Bulk set trails to a street or suburb in service area
- Printing the 3 Main Reports to Track Your Performance - Market Share, Time On Market and Average Sale Price Reports

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Complete Data's Annual Support Subscription provides you with: (continued)

Support for the following functions, provided your version of Complete Data has the function:

Office Work Flow:

- Access the control centre
- Sending internal individual or broadcast messages, email and SMS to other Complete Data users
- Create an Individual Ideal Week, Goals and Results
- Keeping track of individual and Office KPI
- Adding a new or updating an existing office procedures, meetings, complaints and scripts
- Adding a new or updating an existing supplier & solicitor
- Search support database for commonly asked questions
- Add in a new support question and submit
- Tracking what's due on schedule task
- Bulk mail merge letter from schedule task
- Bulk update tasks from incomplete to completed
- Print a list of testimonials
- Generate SMS and completed calls report
- Generate days on market, expired listings, listings by salesperson and listings control report
- Generate market appraisals and inspections report
- Generate sales exchanged, sales settled and commission report
- Generate sales management report
- Adding a new user account
- Changing access privilege of a user account – requires principal written permission
- Re-assign contacts, tasks & trail activities from one user to another – requires principal written permission

Trust Accounting:

- Setting up a new Trust account
- Cancelling a payment or receipt
- Generating a banking sheet
- Doing a Reconciliation
- Adding a variation
- Changing a payment or receipt date / value if not correctable by a cancellation or a variation, client needs to know which payment / receipt. – Requires principal written permission

General Exclusions:

- Complete Data Server re-install
- Data migration
- Export data from a third party provider
- Import data into a third party provider
- Modifications or re-engineering of the program
- Adding a new or customising existing reports, brochures and layouts
- Upgrading FileMaker, Complete Data and its plug-ins to the latest version

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