Lightstone
PROPERTY

Navigating through Toolkit

Property Toolkit User Guide

The Property Toolkit

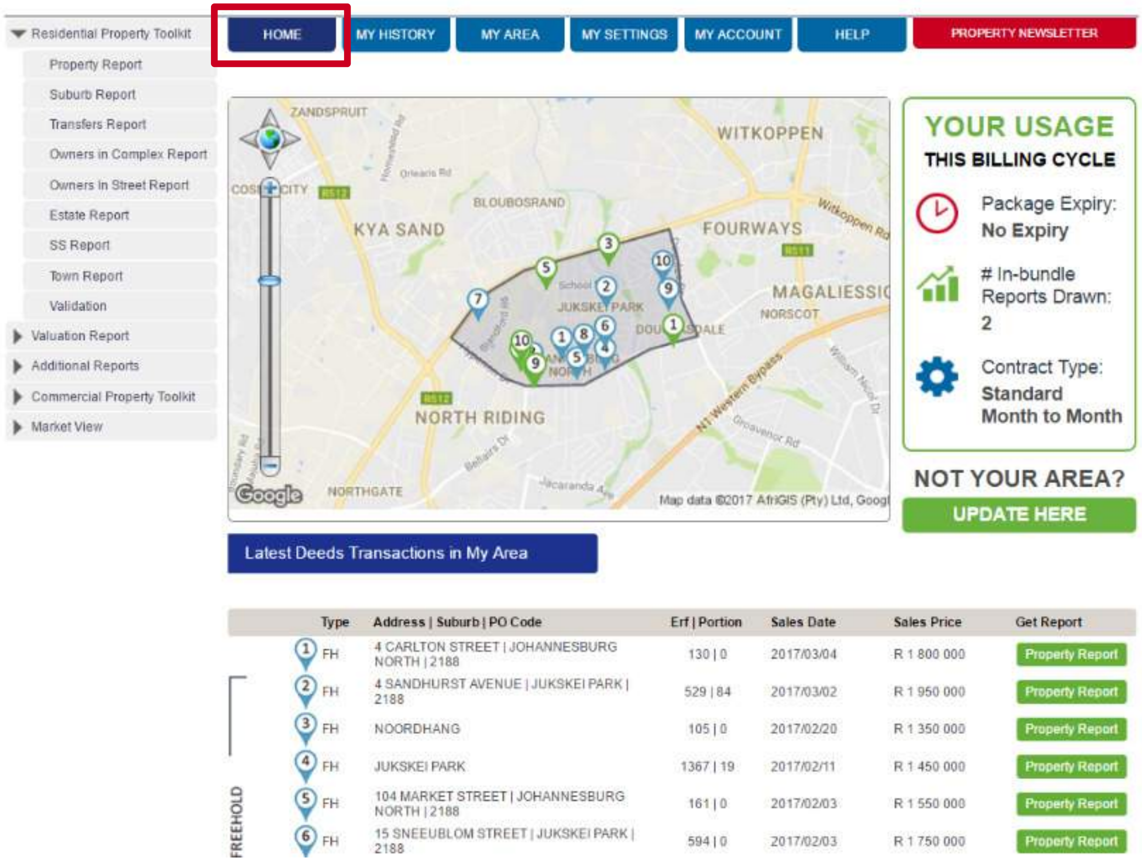
This is a collection of **comprehensive reports** that ensures our clients understand everything about an individual property:

- **Address**
- **Size**
- **Location**
- **Ownership**
- **Sales and mortgage history**
- **Neighbourhood details**

The various subscription options can we viewed on our website:

CLICK HERE

Navigating the Property Toolkit:



"Home" page:

Contains a **map view of the latest deeds** transactions occurring in **your area** as well as **information on your usage.**

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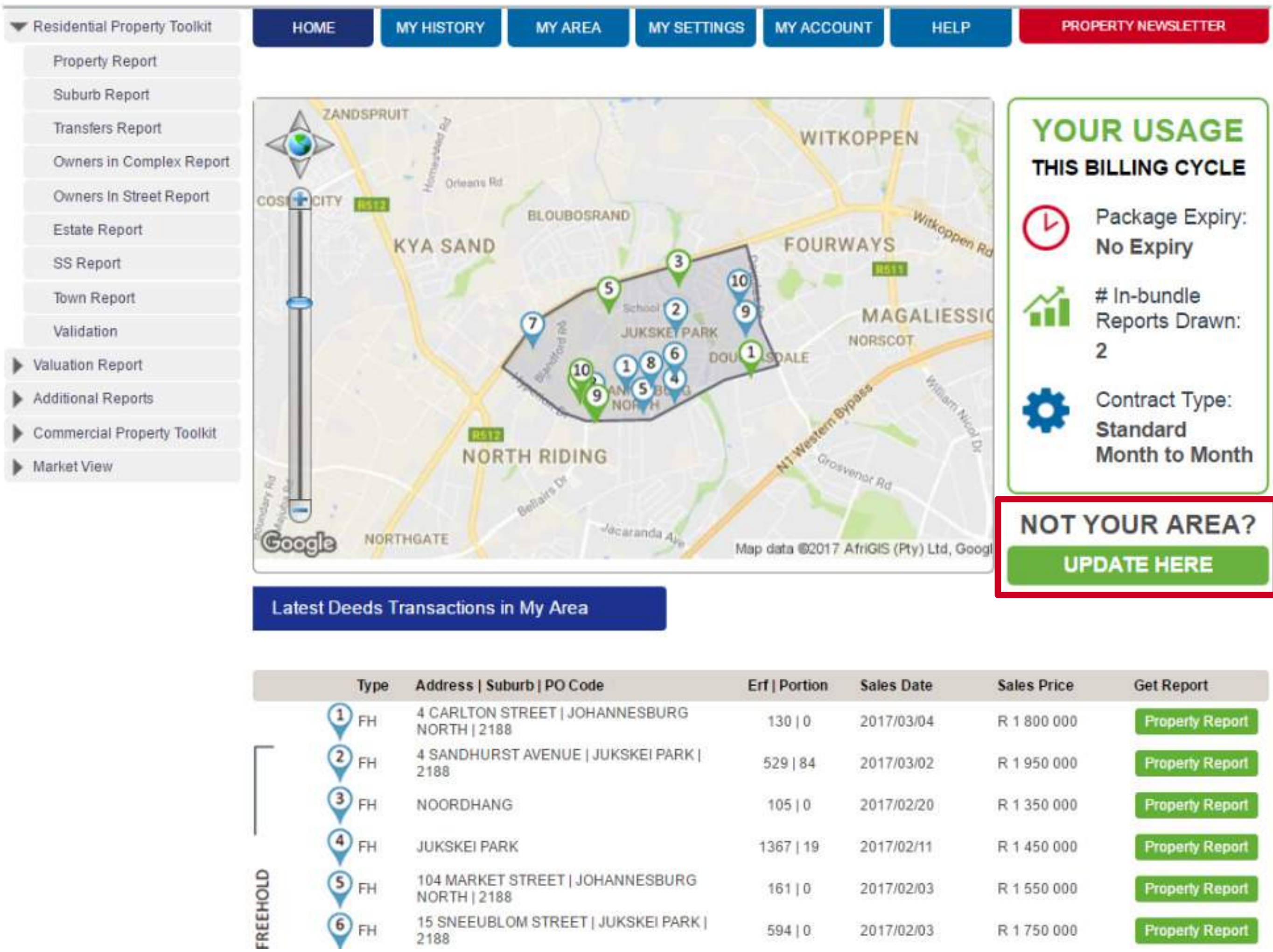
Home page continued…



Your usage information is **automatically updated.**

Update "Your Area" by clicking on **"Update Here"**.

The **Latest Deeds Transactions** will be updated according to **"Your Area" chosen** above.

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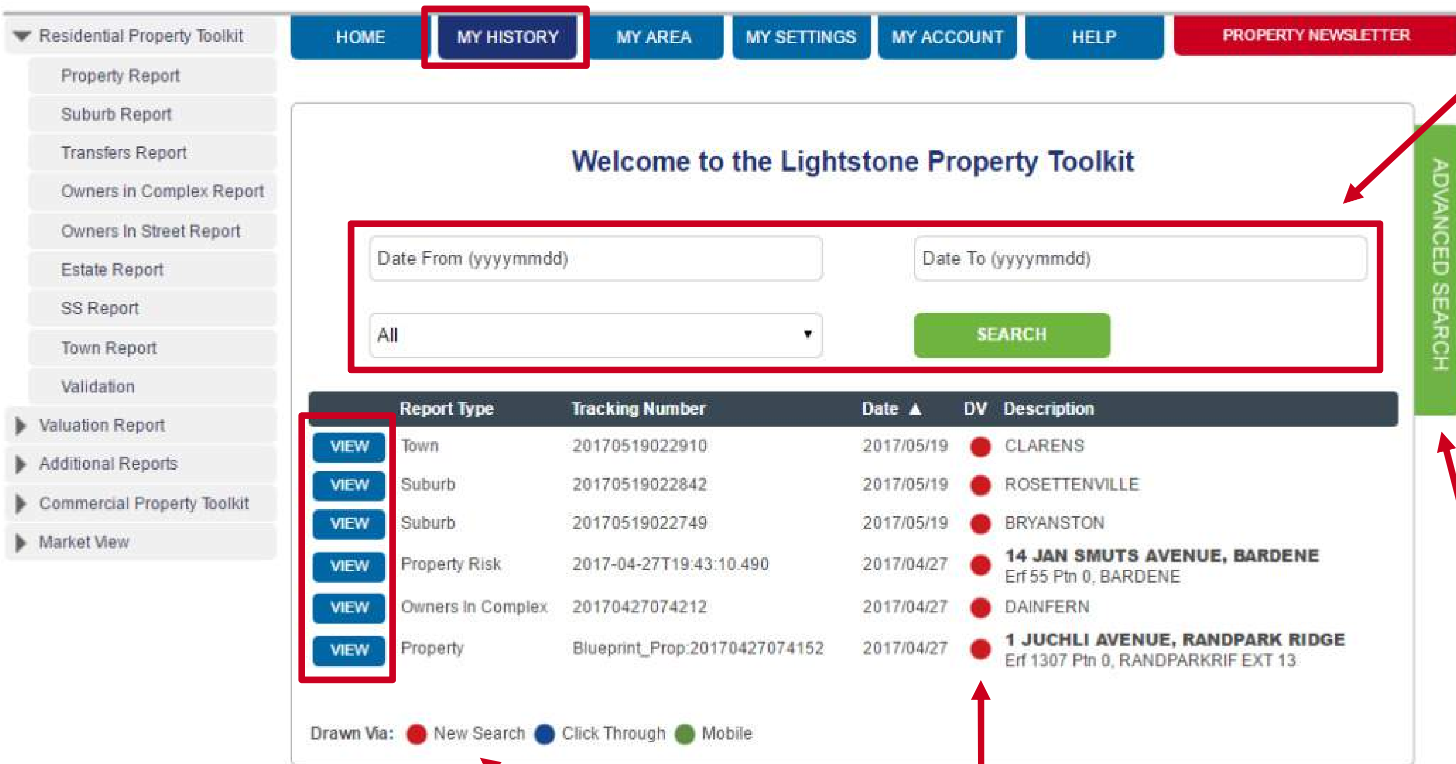
My History Tab:

This tab will contain a list of the **last 10 reports pulled**.
You can quickly access reports pulled by clicking on the **“View”** button next to each listing.



Searching for an older report?
Search using a **date search** *(from and to)* and **select the report type** for easy searching of summary results.

Not finding the report?
For an advanced search click on the **“Advanced Search”** button.

All reports drawn – either through the **mobile app** or via **online Toolkit** will be available in the history section. The colour dots will indicate how the report was drawn.

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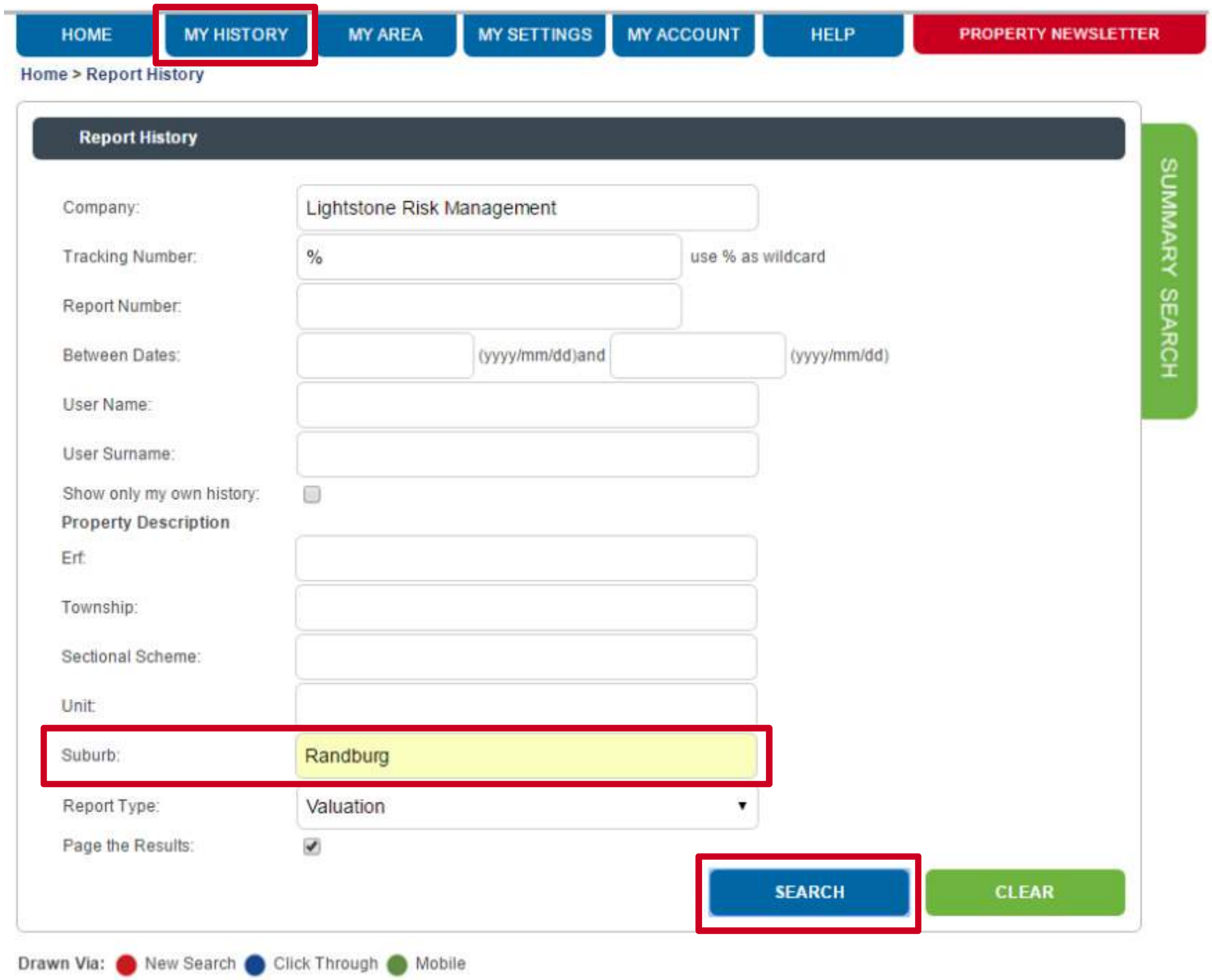
My History “Advanced Search” continued:



In **“Advanced Search”** there are a number of fields that can be filled in to find the report you are searching for.

Remember you don’t need to fill in all the fields, you can fill in only one, for example.

The **suburb field** will return all reports drawn in a specific suburb.

Click **“Search”**.

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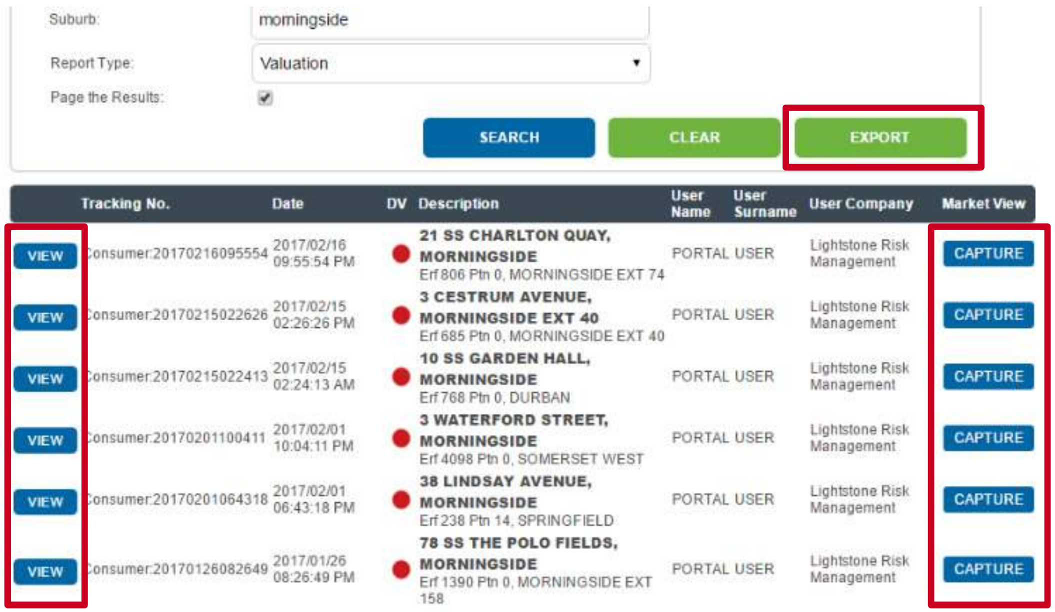
My History “Advanced Search” continued:

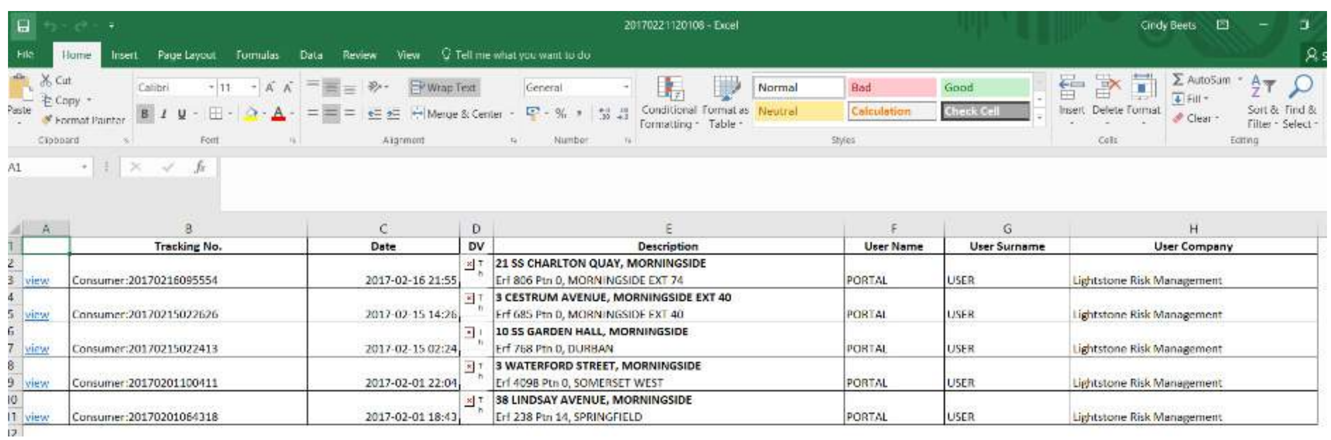
Once **“Search”** is clicked, a **list will appear below the search** showing all historical reports pulled, using the search criteria you have input:



Click **“View”** to see the report again or **“Capture”** to contribute property information on a recent sale to the Market View report.

(Please see Market View report for further information on this report.)

Click **“Export”** to extract a list of all the reports pulled within a certain time frame or suburb into an Excel document:



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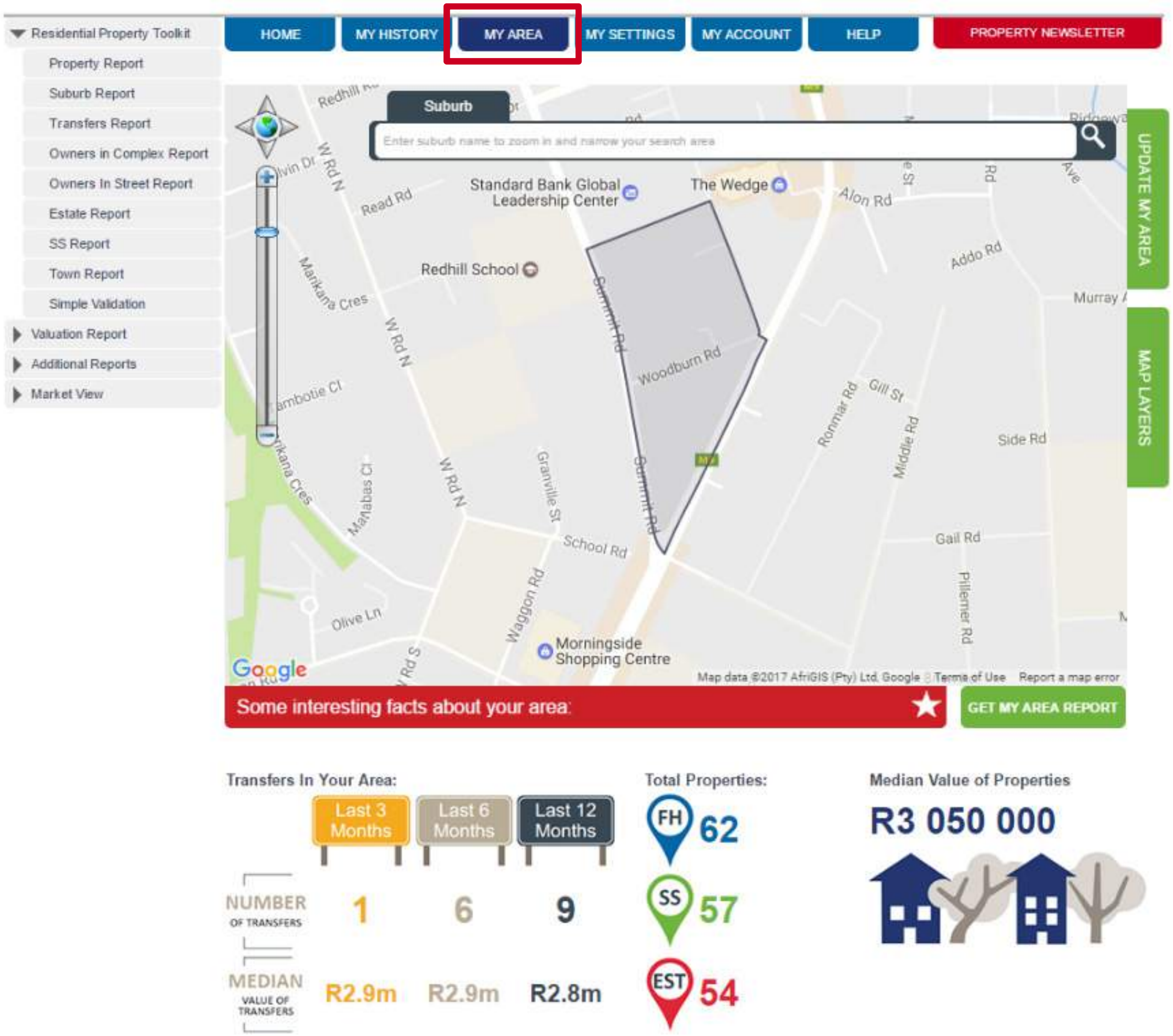
My Area Tab:

This section provides **valuable information on your particular farming area**.



To ensure that <u>only your</u> particular farming area is shown every time you login, make sure that you have your **own individual user login email address**.

Each company account can have **multiple users assigned** to it. The Admin User for your company can set these up.

(See “My Settings” tab and “Admin User” section.)

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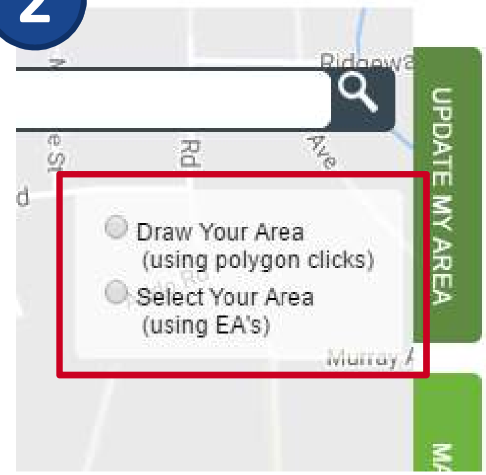
My Area Tab continued:

To update your area click the **"Update My Area"** button on the right hand side of the map:

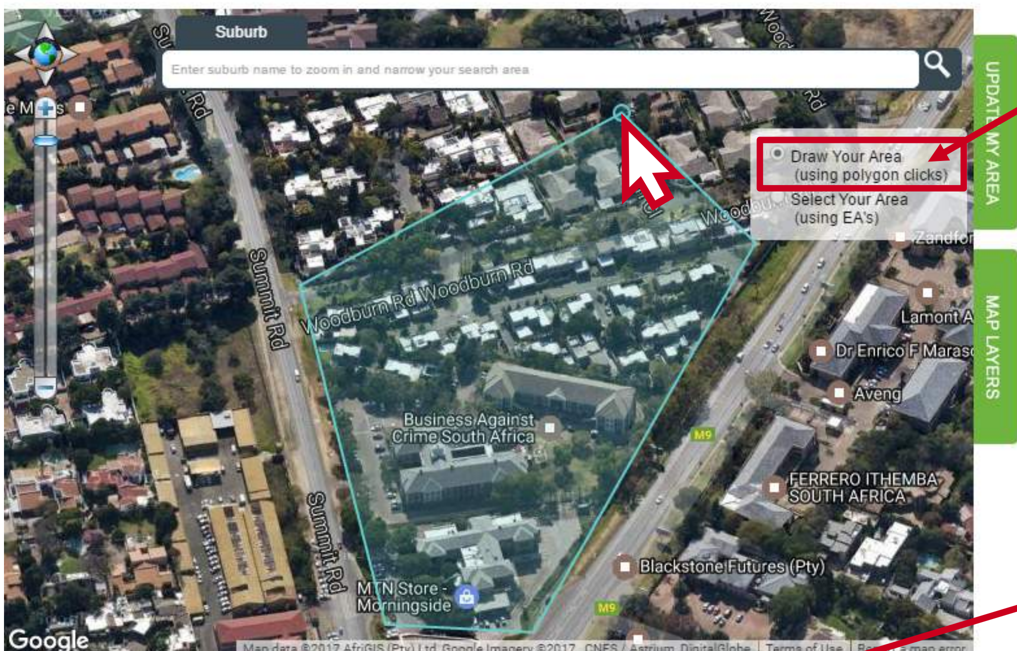
1

2



An options tab will pop up where you can choose to: **"Draw Your Area"** or **"Select Your Area"** using EA's *(Enumerator area).*

If you select **"<u>Draw Your Area</u>"** the map will change to a satellite view where you can use a **polygon tool** to set your area:



Click and drag to define your area, once completed **double click**.

Click **"Save"** to submit your area, or **"Clear"** to reset.

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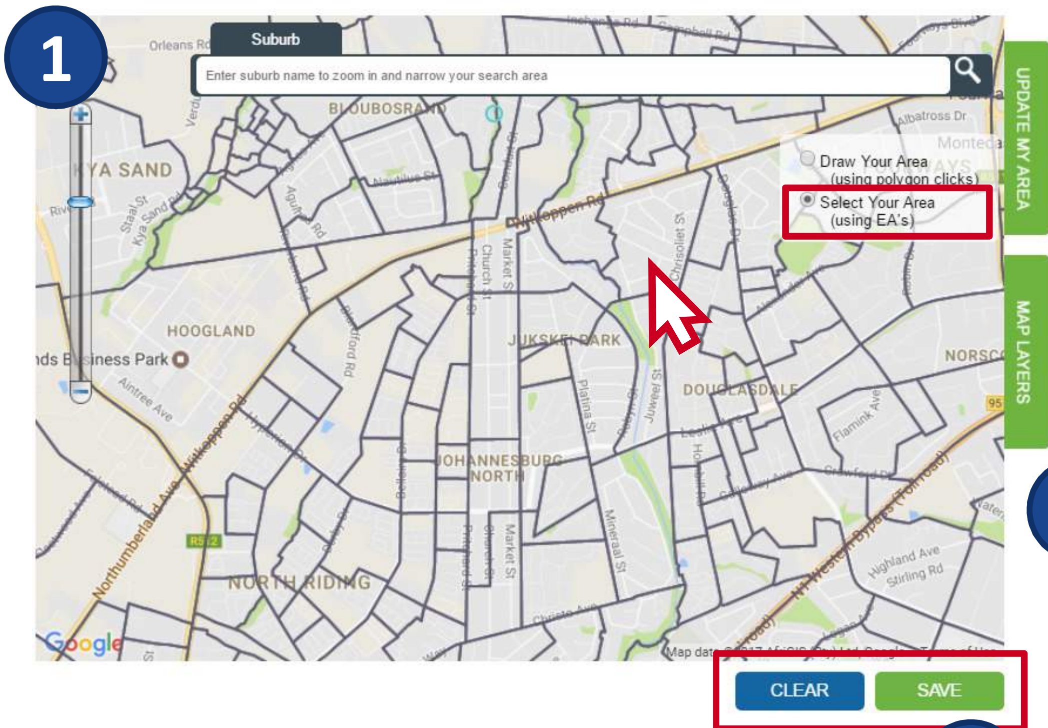
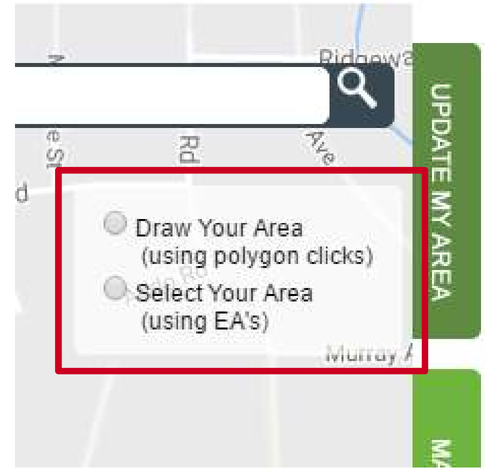
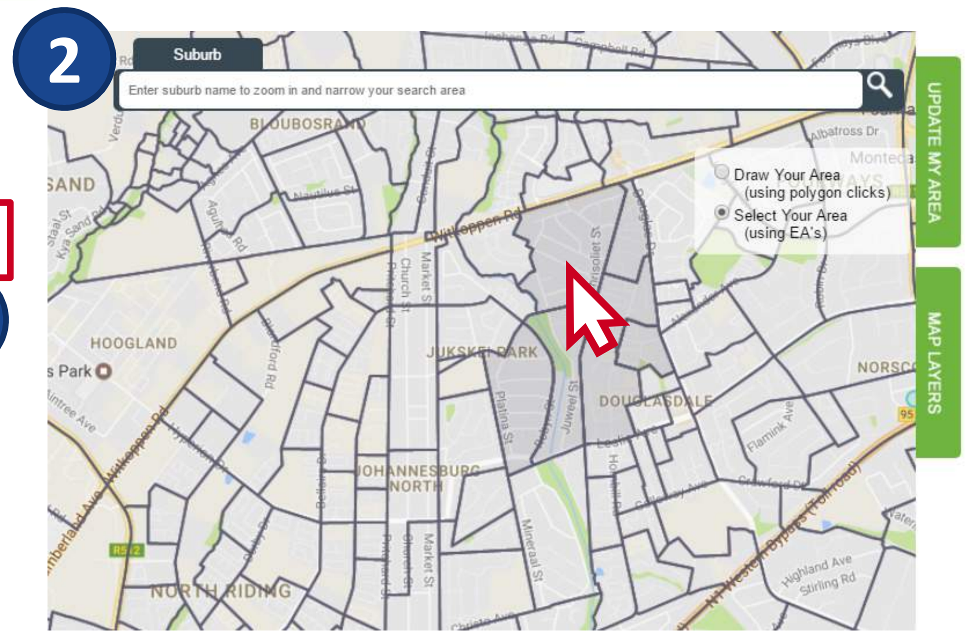
My Area Tab continued:

If you choose **"<u>Select Your Area</u>"** the EA boundaries will become highlighted on the map:





Click on each EA to **select and build up** your area:



3

Click **"Save"** to submit your area, or **"Clear"** to reset.

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My Area Tab continued:

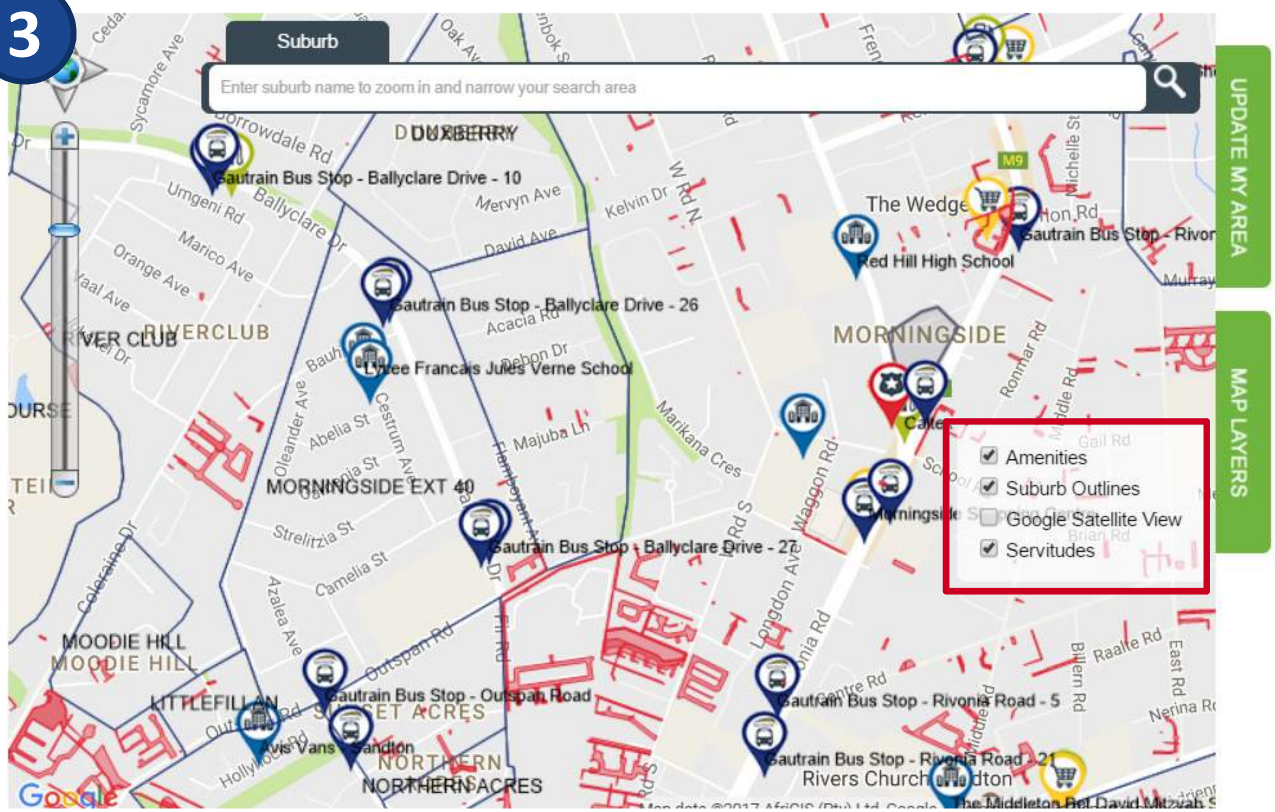
Click on "Map Layers" and choose from the options menu that pops up to view various features contained in your area:

1

2

By **clicking the tick box** next to each item, the results will display on the map:

3



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My Area Tab continued:

The **“interesting facts” below the map** contains **recent transfers in your area**, the **total number of properties** broken into property type and the **median value of all the properties in your area**:

Click on **“Get my Area report”** to access a full report on your area.

The **My Area report** is derived from the area you have defined and contains:

- Information on **the latest 20 Deeds transactions**
- **Interesting facts** about your area like the total number of properties and the median value
- The **Market stock**
- The **demographics**
- Period **of ownership**
- **Age** of residents
- **Activity in your area** – this shows the percentage of properties that were queried by all Lightstone users over the past 12 months
- The property **transfer information**
- **Growth and activity**
- **Lending** by institution
- **Amenities**

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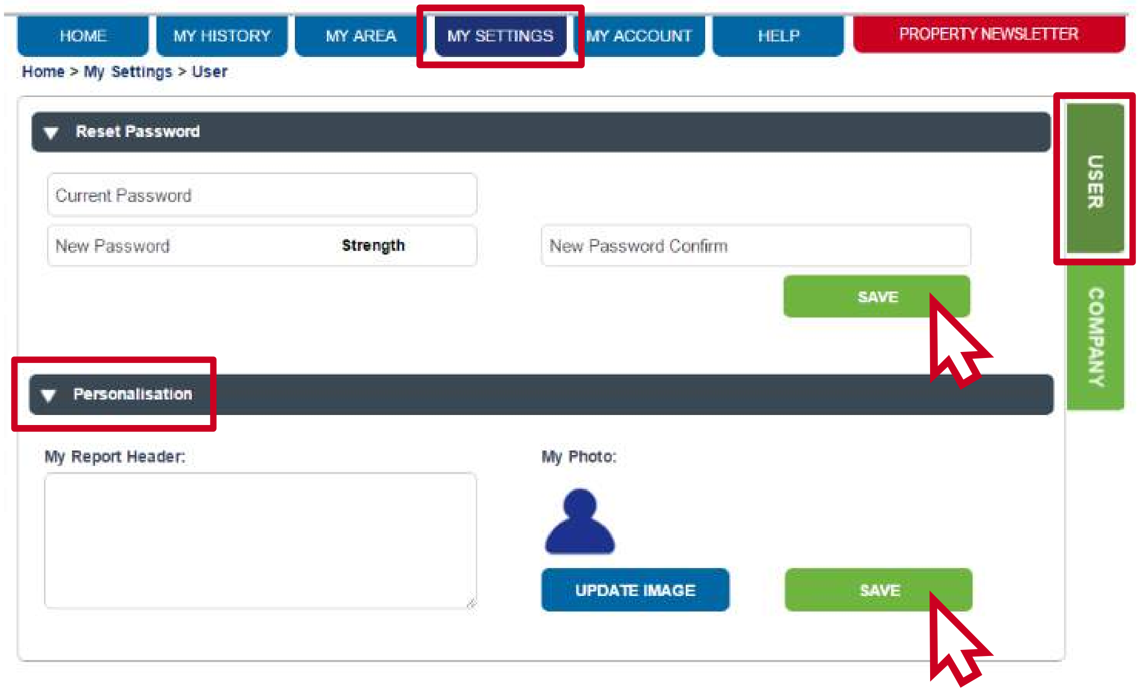
My Settings Tab

Use this tab to **change passwords** and **personalise** all reports.



The **"User"** tab allows you to set a **new password.**

The personalisation field is where you can **upload your photo** and **personalise your report header.**

This is **useful** if you are printing out a property or suburb report to give to a **buyer or seller**.

When you print or email the report **it will contain your image and individual report header on each report**. The report header can contain your contact information for example.

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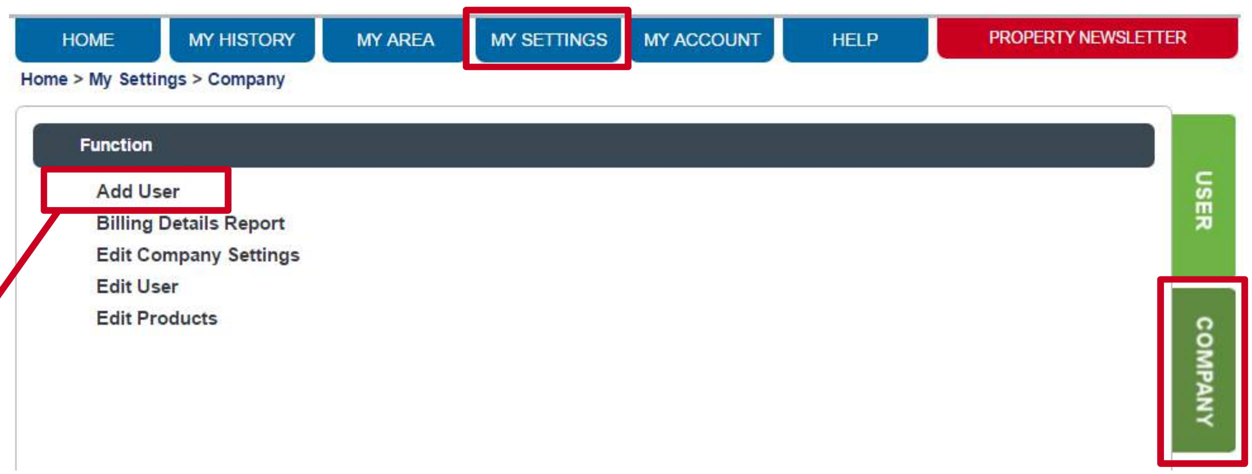
My Settings Tab continued:

The **“Company”** tab is where the admin **user can manage the account**.

Please note this tab is <u>only available</u> to admin users that have been <u>allocated when the Toolkit subscription was set up</u>. To change admin users please contact our support desk (<u>support@lightstone.co.za</u>)



“Add User” allows admin to **add multiple users to the company account** and manage the rights and reports that each user is able to access.

Users that have left the company can **easily be disabled by selecting the “disabled” tick box**.

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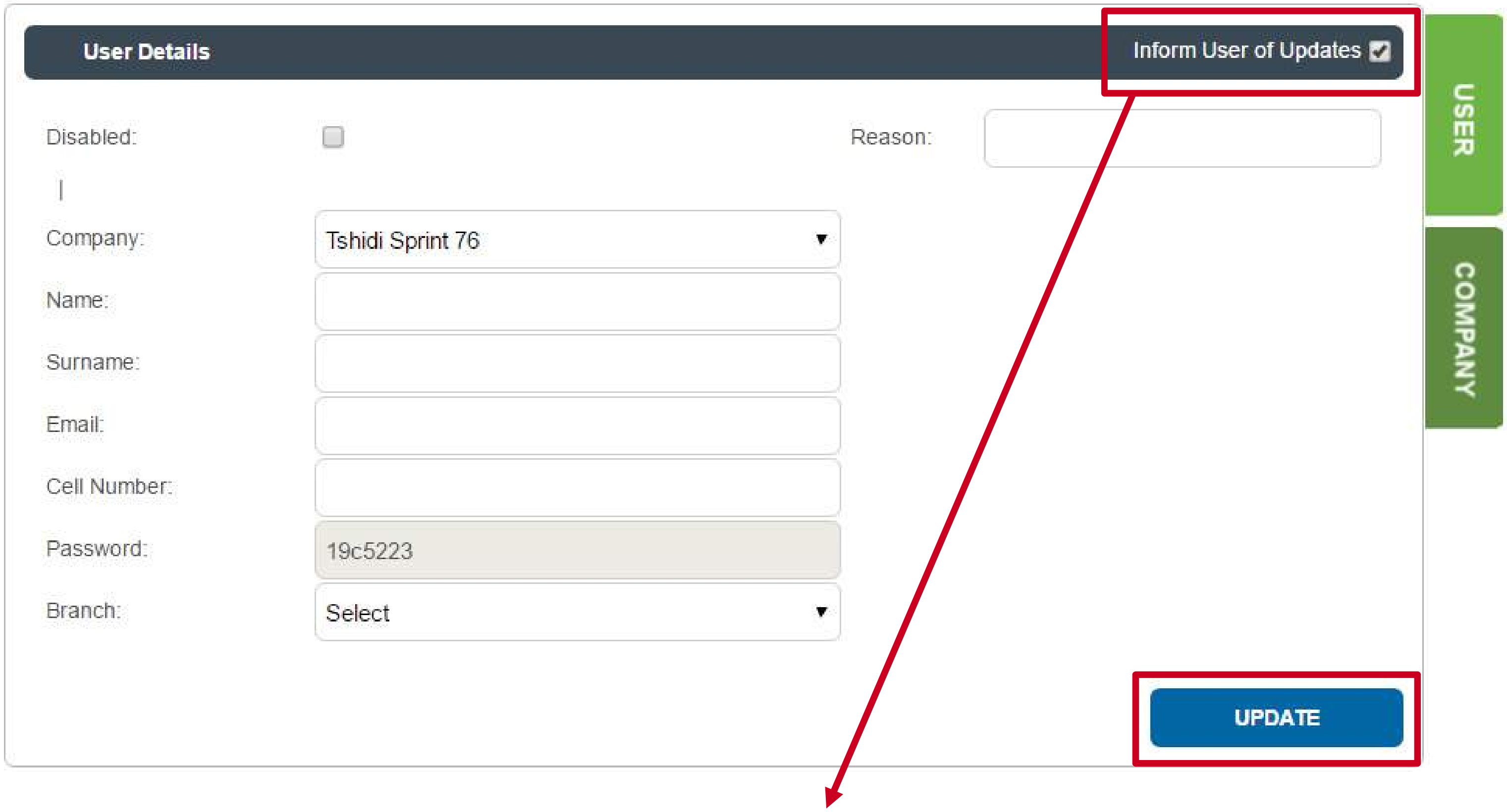
My Settings Tab continued:



Select the check box *(set to automatically inform user)* if you would like to inform the user of any updates to their profile. **Click on the tick to deactivate.**

Click **“Update”** to save all changes.

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My Settings Tab continued:

The **"User Rights"** section allows admin to **select the additional reports that each user is allowed to access.**

Select the **tick boxes to approve** users access to particular reports. <u>Please note</u> that additional fees over and above the monthly subscription will be incurred.

User Rights

Search:

Right	Notes	View
CIPC Searches		
CIPC Searches	CIPC Searches	☐
Commercial Reports		
Commercial Industrial Report	Industrial Report	☐
Commercial Office Report	Office Report	☐
Commercial Retail Report	Retail Report	☐
Complexes in a Suburb		
Complexes In a Suburb	Complexes In a Suburb	☐
Dracore EzContact		
Dracore EzContact	Dracore EzContact Reports	☐
EzContact		
Search Bulk EzContact Reports	Search Bulk EzContact Reports	☐
Search EzContact		☐
EzScore		
Search EzScore		☐

Remember:

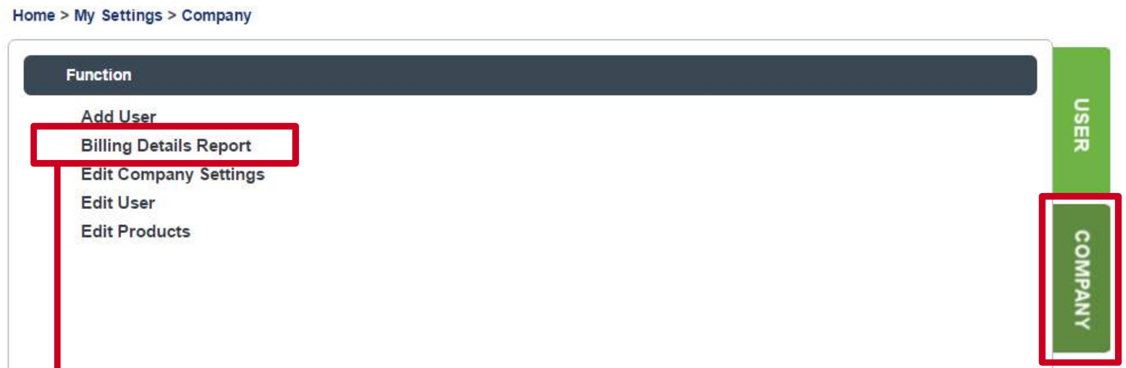
Click "Update" to save all changes.

Click on the "Company" tab to go back to the list of options.

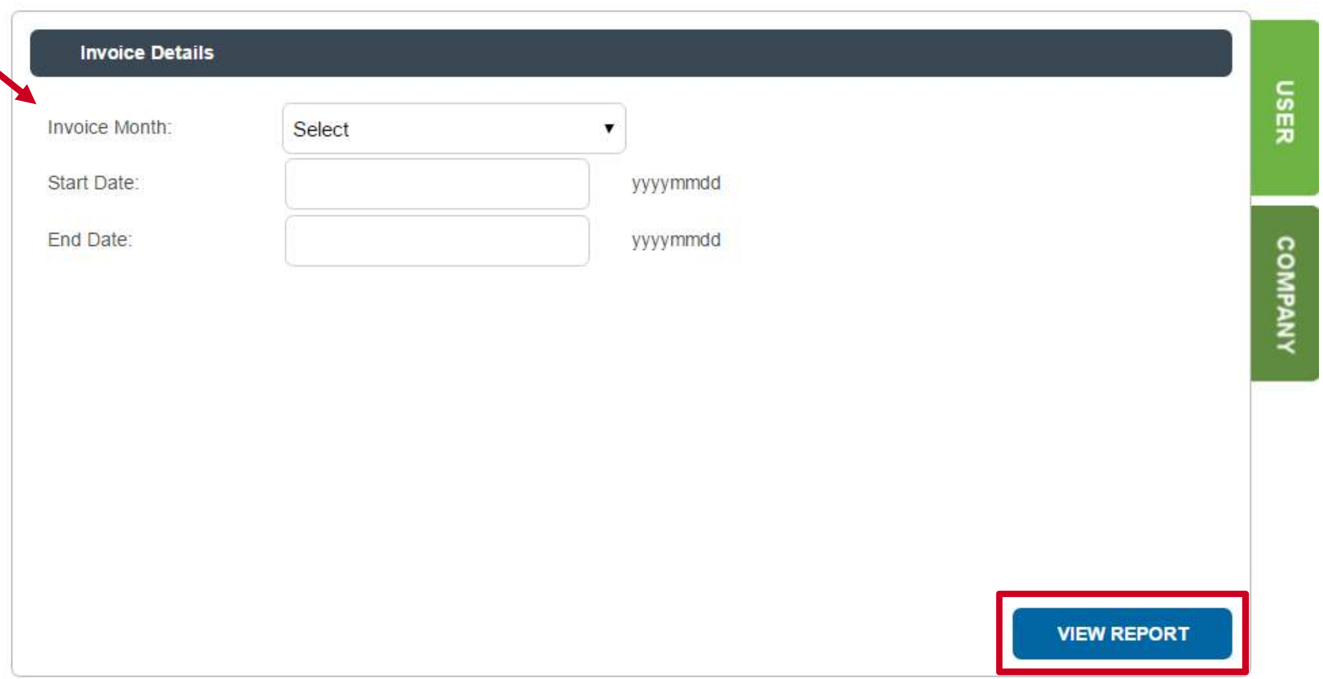
The Property Toolkit

My Settings Tab Continued

To access billing reports, click on **“Billing Details Report”**.



Choose to pull a report per invoice month or select your chosen dates:



Click on **“View Report”** to access required information.

Remember:

Click on the “Company” tab to go back to the list of options.

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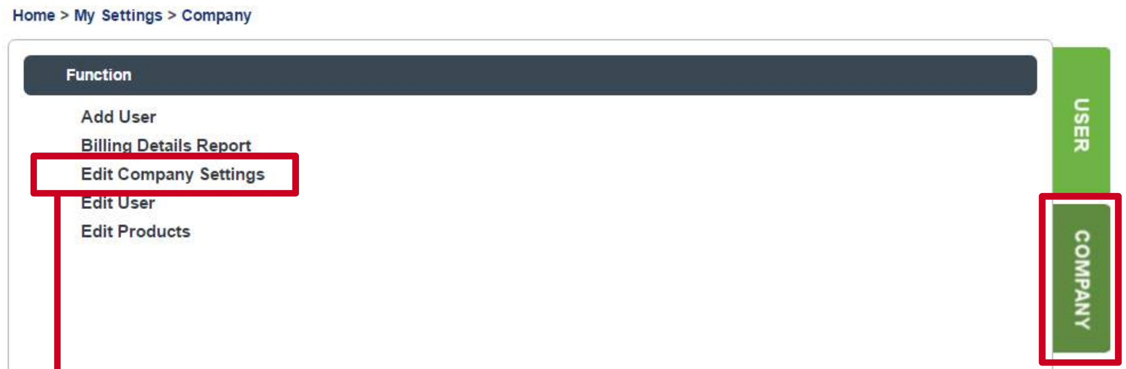
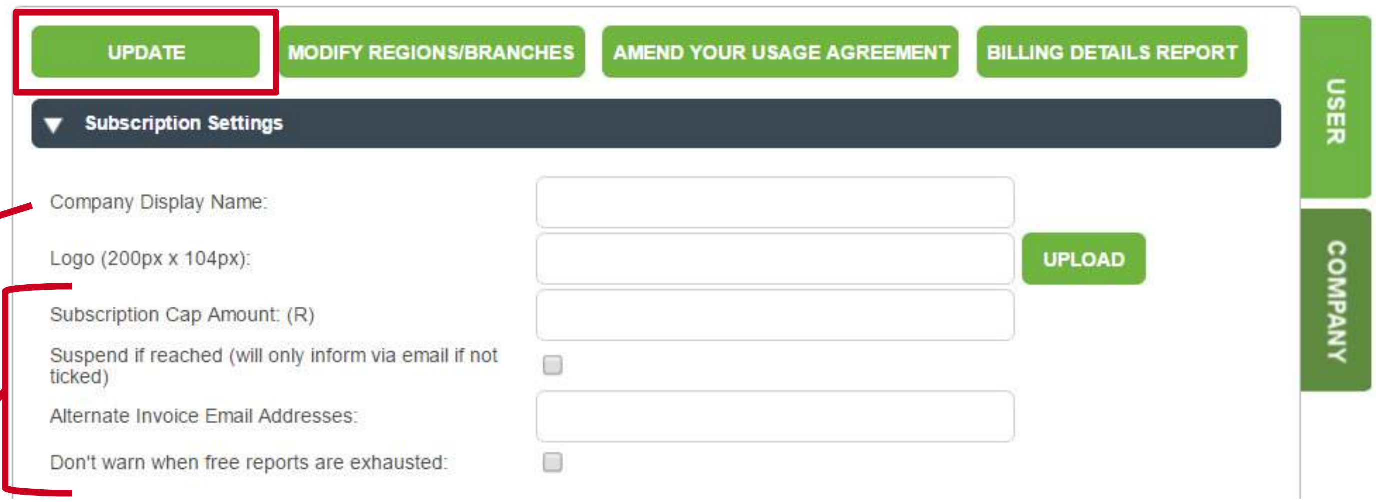
My Settings Tab continued

"Edit Company Settings" allows admin users to change the company settings and information, and display company name or logos on each report.



Fill in the **"Subscriptions Settings"** and click **"Update"** to save.



The **Company Display Name and logo** will appear on all reports pulled by users on your account.

Set a limit to your monthly debit order and advise Lightstone on how you would like to be communicated with should you reach your cap.

Provide an accounts email address if you would like invoices to be sent directly to your accounts department.

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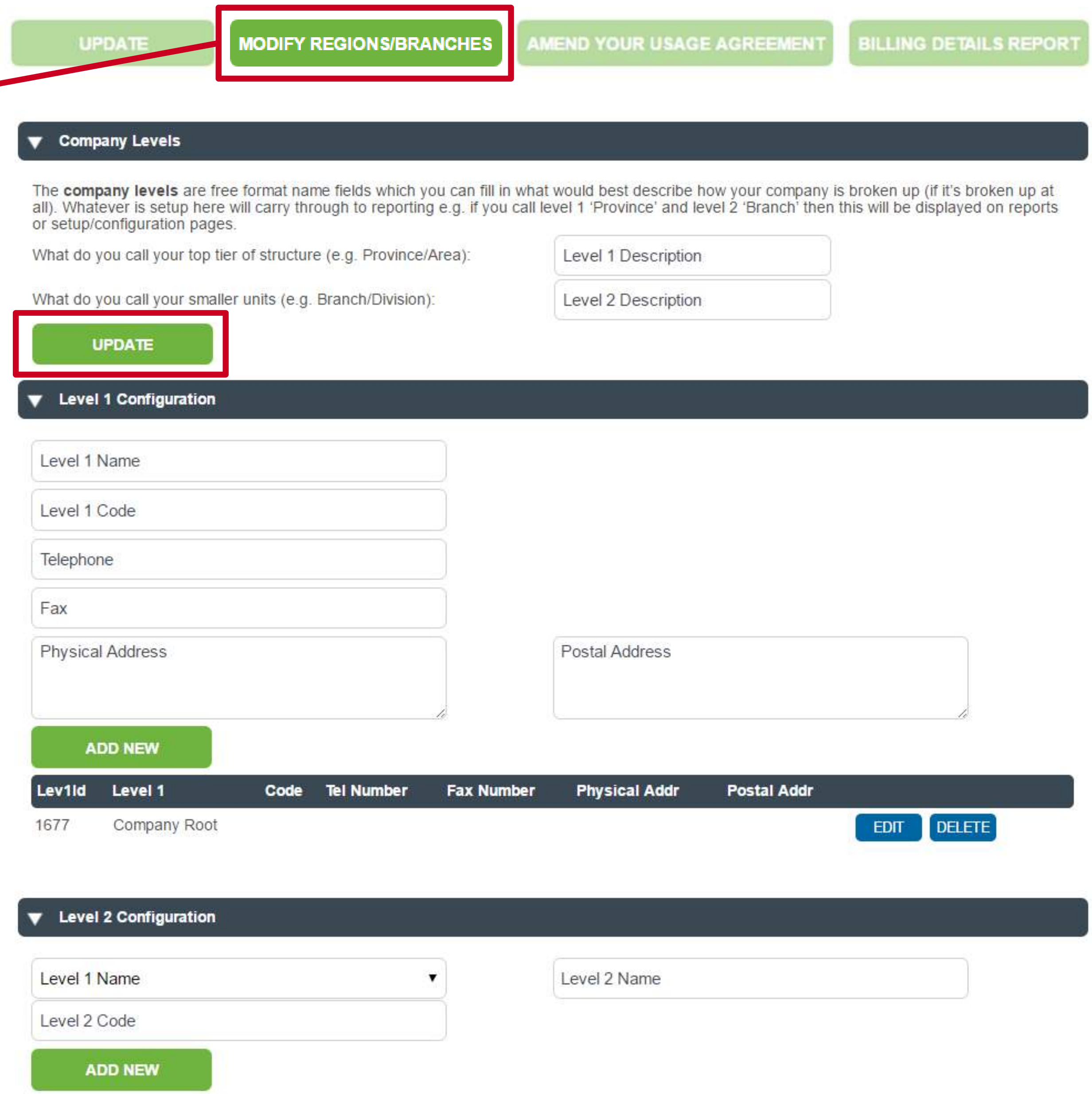
My Settings Tab continued:

Clicking on **“Modify Regions/Branches”** allows admin users to **split company levels** across regions or branches.

Input required information and click **“Update”**.



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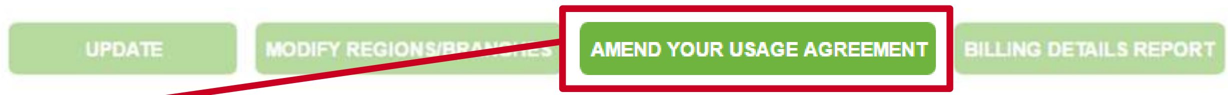
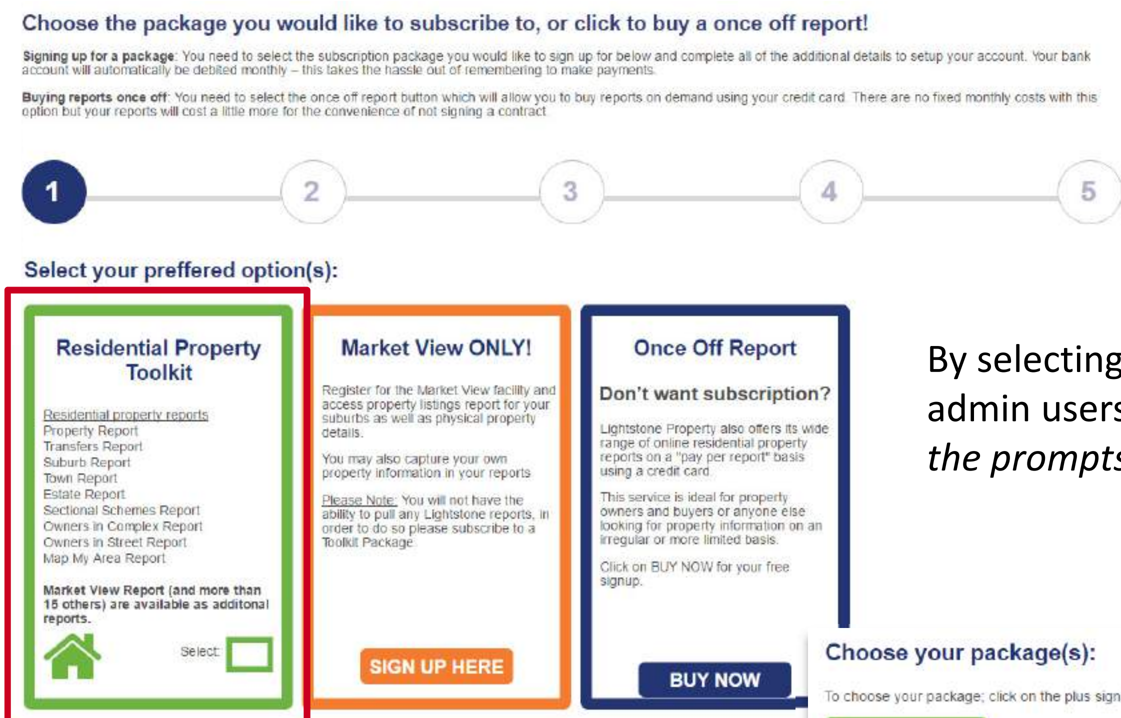
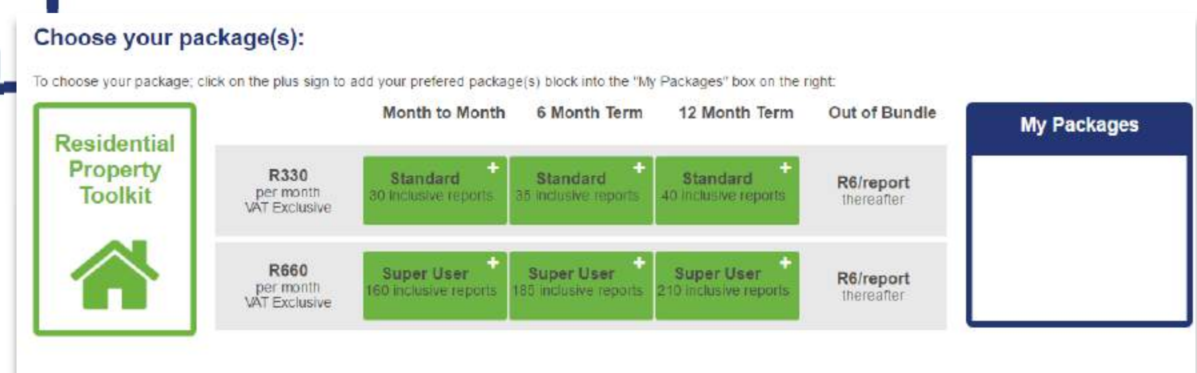
My Settings Tab continued:



Click on **“Amend Your Usage Agreement”** to change your subscription package options:



By selecting the **“Residential Property Toolkit”** option admin users can change the subscription package *(follow the prompts accordingly).*



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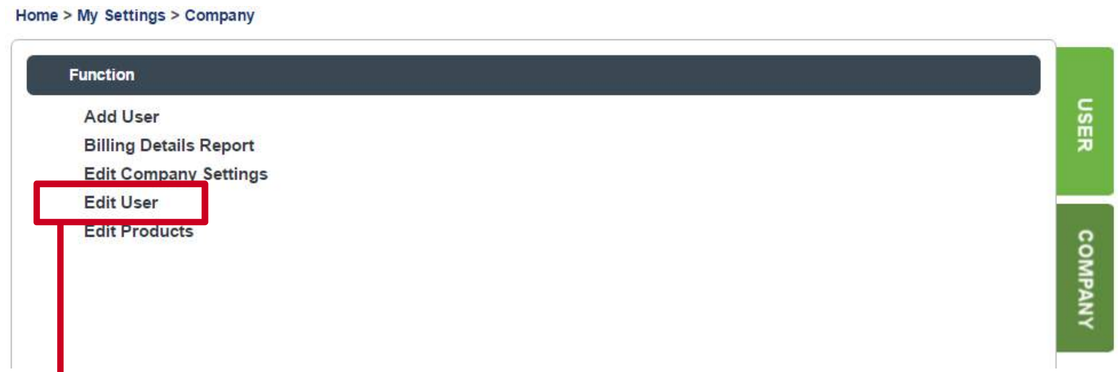
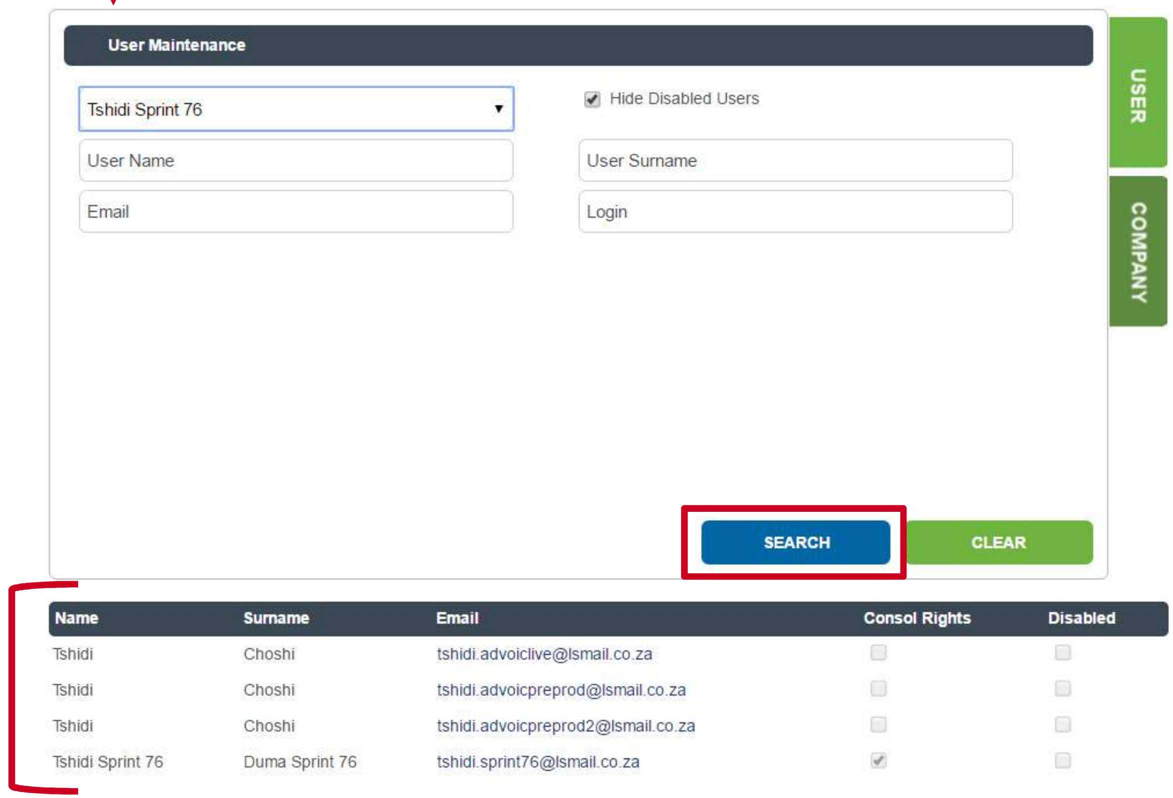
My Settings Tab continued:

Edit individual users by clicking on **"Edit Users"**:



Search for users and access their profiles and settings or choose from the list at the bottom of the screen.

Edit profiles of each user as desired.



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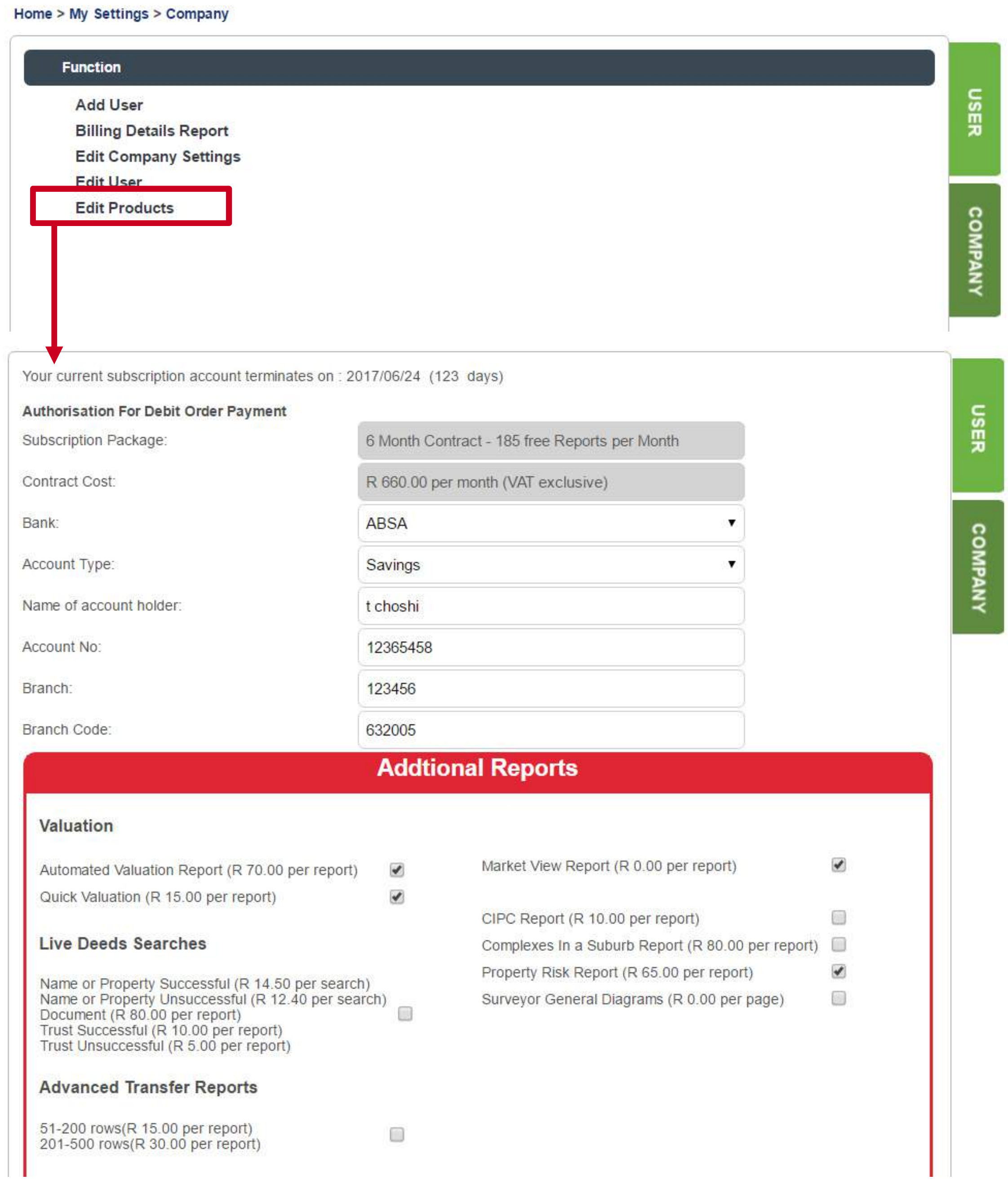
My Settings Tab continued:

The **“Edit Products”** selection will allow admin users access to **various additional reports**.

By adding on reports in this section it will make them <u>available to all users in the company account</u>.

“Edit Products” also contains information on when your subscription will expire, debit order information and additional reports available on the account.

Select desired reports and click **“Update”**.



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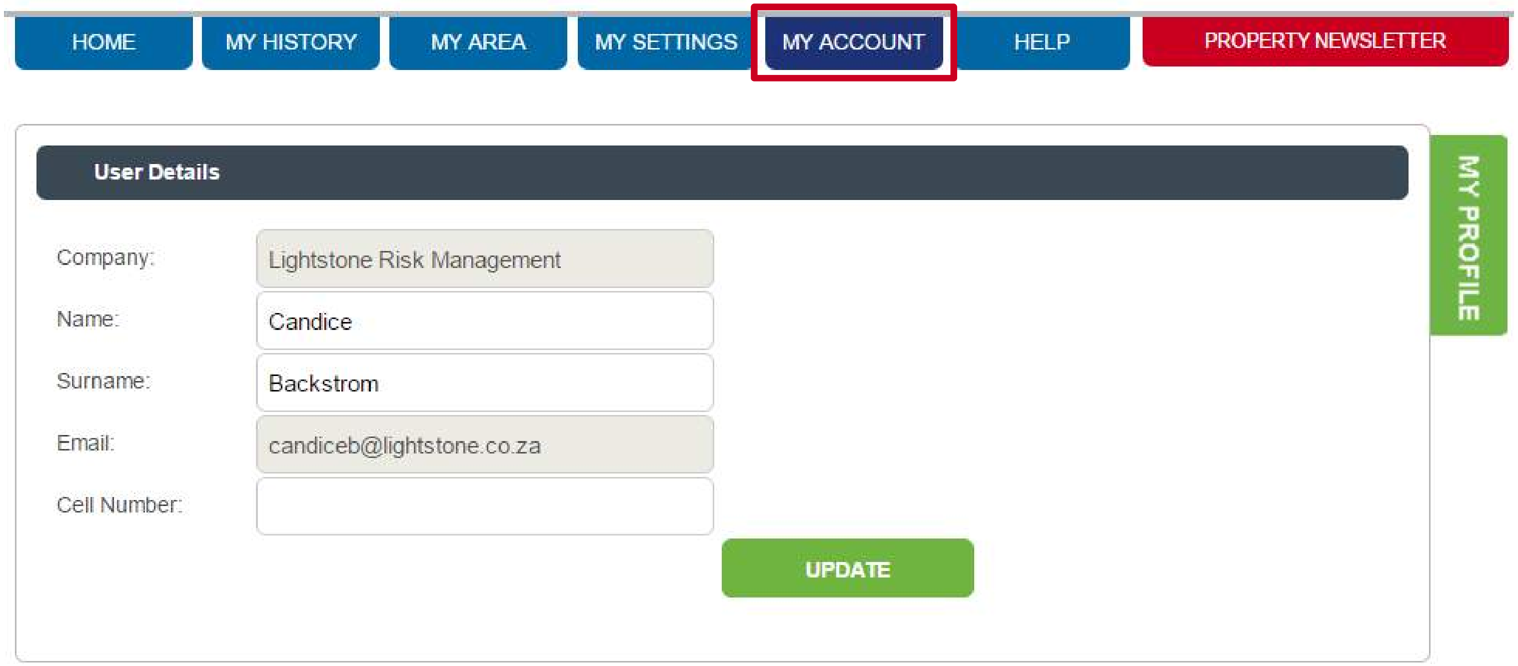
My Account Tab:

Use this tab to **update your account settings**, see what reports you have access to, and request access to additional reports:



Ensure **email address is correct** and include further contact details should you wish to.

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My Account Tab continued:

Active reports will indicate which reports you currently have access to:

Active Reports		
CIPC Searches		
CIPC Searches	CIPC Searches	✔
Commercial Reports		
Commercial Industrial Report	Industrial Report	✔
Commercial Office Report	Office Report	✔
Commercial Retail Report	Retail Report	✔
Complexes in a Suburb		
Complexes In a Suburb	Complexes In a Suburb	✔

Inactive reports indicate various other reports available to you:

Inactive Reports		
Commercial Transfers Report		
Commercial Transfers Report	Commercial Transfers Report	REQUEST ACCESS
Dracore EzContact		
Dracore EzContact	Dracore EzContact Reports	REQUEST ACCESS

To request access **click on the "Request Access" button,** an email will be sent to the admin user requesting access be granted for an additional report *(the admin user can grant access in the* ***My Settings*** *Tab).*

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Help Tab:

Use this section to **download various help guides**, get in touch with our **call center**, access **online chat**, and see a general list of **FAQ’s**.

Property Newsletter:

We publish **monthly newsletters** all relating to the property market. You can **subscribe** to receive these newsletters directly in your inbox, or **view the last 10 newsletters** by clicking on the view latest button:

!

Tooltip:

Click on “Property Newsletter” block to get the grey block to appear.

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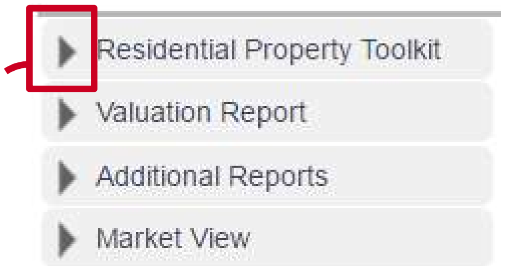
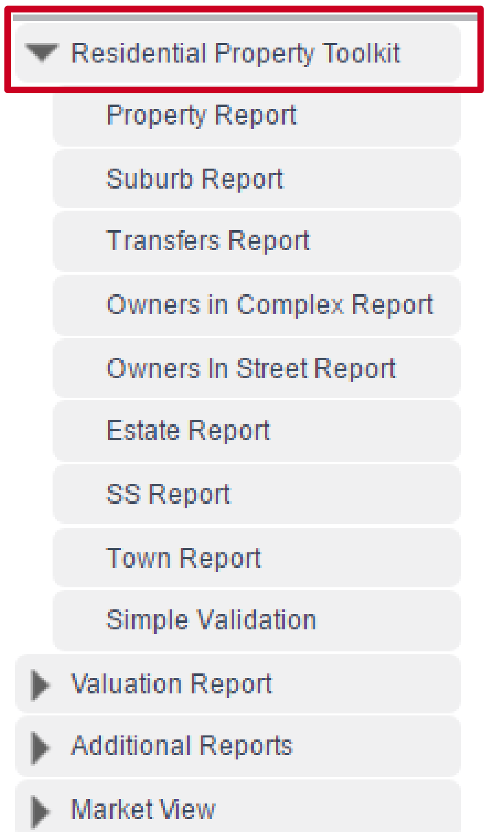
The reports can be navigated using the menu bar on the left of the screen:



(click on the grey arrow to expand the list of reports available)



The various Property Toolkit Reports are **Inclusive reports** <u>according to your subscription</u>, and are contained in the Residential Property Toolkit tab.