

Navigating through Toolkit

Property Toolkit User Guide

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

- Address
- Ownership

• Size

- . Sales and mortgage history
- Location
- 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...



	Туре	Address Suburb PO Code	Erf Portion	Sales Date	Sales Price	Get Report
	1 FH	4 CARLTON STREET JOHANNESBURG NORTH 2188	130 0	2017/03/04	R 1 800 000	Property Report
_	2 FH	4 SANDHURST AVENUE JUKSKEI PARK 2188	529 84	2017/03/02	R 1 950 000	Property Report
	FH	NOORDHANG	105 0	2017/02/20	R 1 350 000	Property Report
	4 FH	JUKSKEI PARK	1367 19	2017/02/11	R 1 450 000	Property Report
HOLD	5 FH	104 MARKET STREET JOHANNESBURG NORTH 2188	161 0	2017/02/03	R 1 550 000	Property Report
FREE	6 FH	15 SNEEUBLOM STREET JUKSKEI PARK 2188	594 0	2017/02/03	R 1 750 000	Property Report



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.

Residential Property Toolkit Property Report Suburb Report		RY MY AREA MY SETTING	GS MY ACCOUNT	HELP PROPERTY NEWSLE	TTER	Searching for an older report? Search using a date search
Transfers Report		Welcome to the Ligh	tstone Propert	v Toolkit		(from and to) and select the
Owners in Complex Report					DVA	report type for easy searching
Owners In Street Report					NC	of summary results
Estate Report	Date From (yyyymm	dd)	Date To (yyy	ymmdd)	E	of summary results.
SS Report					SEA	
Town Report	All	۲	SEAR	CH	RCF	
Validation						
Valuation Report	Report Type	Tracking Number	Date A DV De	scription		
Additional Reports	Town	20170519022910	2017/05/19 OCL	ARENS	1	
Commercial Property Toolkit	VIEW Suburb	20170519022842	2017/05/19 🔴 RC	DSETTENVILLE		
Market View	VIEW Suburb	20170519022749	2017/05/19 🔴 BR	YANSTON		
	VIEW Property Risk	2017-04-27T19:43:10.490	2017/04/27 🔴 14 Erf	55 Ptn 0, BARDENE		
	VIEW Owners In Complex	20170427074212	2017/04/27 🔵 DA	INFERN		
	VIEW Property	Blueprint_Prop:20170427074152	2017/04/27 🕚 1. Erf	1307 Ptn 0, RANDPARKRIF EXT 13	N	lot finding the report?
	Drawn Via: 🔴 New Search 🌘	Click Through 🌑 Mobile	1		F c	or an advanced search click on the "Advanced Search"
		All reports dra app or via onl the history sec indicate how t	wn – either ine Toolkit ction. The co he report w	through the mobile will be available in olour dots will vas drawn.	t	outton.





My History "Advanced Search" continued:

HOME	MY HISTORY	MY AREA	MY SETTINGS	MY ACCOUNT	HELP	PROPERTY NEWSLETTER
e > Report His	story					
Report His	tory					
Company:	1	Lightstone Risk	Management			
Tracking Num	iber:	%		use % as	wildcard	ART
Report Numbe	er:					U U
Between Date	is:		(yyyy/mm/dd)and		(yyyy/mm/dd)	
User Name:						
User Surname	a:					
Show only my	own history:	D				
Erf:	cription					
Township:						
Sectional Sch	eme:					
Unit:						
Suburb:	F	Randburg				
Report Type:	2	Valuation		•		
Page the Resi	uits:	0				
					SEARCH	CLEAR

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 <u>all</u> reports drawn in a specific suburb.

Click "Search".

Drawn Via: 📵 New Search 🔵 Click Through 🌑 Mobile



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:

	andr e			20170221120106 - Excel			Cindy Beets	B - D
	Home Insert Page Layout Formulas	Data Review View CTe		what you want to do				8
Paste Ci	Cut Calibri - 11 - A A Copy - Format Painter Spaard - Fort -	= = ⇒. Er Wrap Te = = = ≤ ≤ → Merge S Algrmont	itt Cernt	er - 😰 - % * 式 📲 S Number *	Bad Celculation Styles	Good Check Cell	E Aur Insert Delete Format Colic	oSum * AT P * Sort & Find & n * Filter * Select * Eating
A1	a ∨ × : •	c	D	ŕ	F	G	н	
t C	Tracking No.	Date	DV	Description	User Name	User Surname	User Con	DADA
2 3 view	Consumer:20170216095554	2017-02-16 21:55	s T b	21 SS CHARLTON QUAY, MORNINGSIDE Erf 806 Ptri D, MORNINGSIDE EXT 74	PORTAL	USER	Lightstone Risk Managem	ent
4 5 view	Consumer:20170215022626	2017-02-15 14:26	T n	3 CESTRUM AVENUE, MORNINGSIDE EXT 40 Erf 685 Ptn D, MORNINGSIDE EXT 40	PORTAL	USER	Lightstone Risk Managem	ient
6 7 <u>view</u>	Consumer:20170215022413	2017-02-15 02:24	1	10 55 GARDEN HALL, MORNINGSIDE Erf 758 Ptn 0, DURBAN	PORTAL	USER	Lightstone Risk Managen	ienț
8 9 view	Consumer:20170201100411	2017-02-01 22:04	n n	3 WATERFORD STREET, MORNINGSIDE Erf 4098 Ptn 0, SOMERSET WEST	PORTAL	USER	Lightstone Risk Managen	ient
IO I1 view	Consumer:20170201064318	2017-02-01 18:43	х т h	38 LINDSAY AVENUE, MORNINGSIDE Erf 238 Ptri 14, SPRINGFIELD	PORTAL	USER	Lightstone Risk Managem	ent

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.)



My Area Tab continued:

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

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

> Draw Your Area select Your Are

resi(Ptv

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

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









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:



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:



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





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**:



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



My Settings Tab

Use this tab to change passwords and personalise all reports.



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.



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>)

	HOME MY HISTORY	MY AREA	MY SETTINGS	MY ACCOUNT	HELP	PROPERTY NEWSLETTER
Ho	me > My Settings > Company Function					
	Add User Billing Details Report					USER
	Edit Company Settings Edit User					
	Edit Products					COMP
						ANY

"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.



My Settings Tab continued:

User Details		Inform User of Updates 🜌
Disabled:		Reason:
l Company:	Tshidi Sprint 76	
Name:		
Surname:		
Email:		
Cell Number:		
Password:	19c5223	
Branch:	Select	•
		UPDATE

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.

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 Remember:	
CIPC Searches			
CIPC Searches	CIPC Searches	Click "Update	e" to save all changes.
Commercial Reports		Click on the "	Company" tab to go ba
Commercial Industrial Report	Industrial Report	to the list of	options.
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			







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.

Function	
Add User	
Billing Details Report	
Edit Company Settings	
Edit User	
Edit Products	

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.

UPDATE MODIFY REGIONS/BRAN	CHES AMEND YOUR USAGE AGREEMENT	BILLING DETAILS REPORT
Subscription Settings		
Company Display Name:		
Logo (200px x 104px):		UPLOAD
Subscription Cap Amount: (R)		
Suspend if reached (will only inform via email if not ticked)	0	
Alternate Invoice Email Addresses:		
Don't warn when free reports are exhausted:		

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.

Home > My Settings > Company

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"**.

UPDATE MODIFY REGIONS/BRANCHES	AMEND YOUR USAGE AGREEMENT	BILLING DETAILS REPOR
Company Levels		
The company levels are free format name fields which you can fill in all). Whatever is setup here will carry through to reporting e.g. if you or setup/configuration pages.	what would best describe how your company is call level 1 'Province' and level 2 'Branch' then	s broken up (if it's broken up at this will be displayed on reports
What do you call your top tier of structure (e.g. Province/Area):	Level 1 Description	
What do you call your smaller units (e.g. Branch/Division):	Level 2 Description	
UPDATE		
Level 1 Configuration		
Level 1 Name		
Level 1 Code		
Telephone		
Fax		
Physical Address	Postal Address	
ADD NEW		R
Lev1id Level 1 Code Tei Number Fax Num	ber Physical Addr Postal Addr	
1677 Company Root		EDIT DELETE
Level 2 Configuration		
Level 1 Name	Level 2 Name	
Level 2 Code		
ADD NEW		

My Settings Tab continued:





Click on "Amend Your Usage Agreement" to change your subscription package options:



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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.

Home > My Settings > Company Function USER Add User **Billing Details Report** Edit Company Settings Edit User Edit Products COMPANY **User Maintenance** USER Hide Disabled Users Tshidi Sprint 76 User Name User Surname COMPANY Email Login SEARCH Name Surname Email **Consol Rights** Disabled Tshidi Choshi tshidi.advoiclive@lsmail.co.za Tshidi Choshi tshidi.advoicpreprod@lsmail.co.za Tshidi Choshi tshidi.advoicpreprod2@lsmail.co.za tshidi.sprint76@lsmail.co.za 1 Duma Sprint 76 Tshidi Sprint 76



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</u> <u>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".

Home > My Settings > Company





My Account Tab:

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

User Details			
Company:	Lightstone Risk Management		
Name:	Candice		
Surname:	Backstrom		
Email:	candiceb@lightstone.co.za		
Cell Number:			

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

My Account Tab continued:

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

Active Reports		
CIPC Searches		
CIPC Searches	CIPC Searches	
Commercial Reports		
Commercial Industrial Report	Industrial Report	1
Commercial Office Report	Office Report	1
Commercial Retail Report	Retail Report	s.
Complexes in a Suburb		
Complexes In a Suburb	Complexes In a Suburb	4

Inactive reports indicate various other reports available to you:

Commercial Transfers Report		
Commercial Transfers Report	Commercial Transfers Report	REQUESTACCESS
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).



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:



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

