


Getting Ready For Proficient - Software

As part of your Proficient Project, the Software is set up with your information.

If you already have information in electronic format, it may be possible to import it into the Proficient Software so you can start working with familiar data.

The minimum amount of information for anything relating to Property (including Sales and Valuation Jobs) is the full address (street number, name, type, suburb, state, postcode and/or full Division and Plan details).


A Licensed Company identifies your Organisation in the software. The details of your Organisation are also used to create your license.



Gather contact information for your Organisation including physical and postal addresses, logo and ABN/ACN. This will be used to set up your Licensed Company.

Company


Each Person in your Organisation is given a User account. This account identifies them, gives them access to options to customise their use of the system.



For each person, list their full name, qualifications, preferred password and an electronic version of their signature to set up user accounts.

Users


Contacts can be stored for easy location by anyone in your Organisation. Contacts can also be connected to Events to identify the people in various Roles.



Compile a list of frequently used Contacts concentrating on Clients and Agents. Include phone, fax and e mail details.

Contacts


Existing Valuation Jobs can be imported. This allows you to start using the System with familiar data available.



A spreadsheet showing details of your jobs can be used to create Valuation Events. Include Job Number, Full Address, Date of Report, Valuer and Valuation Amount.

Valuation Jobs


Property Sales serve a dual purpose. They provide reference for Market Evidence and also help to build a database of Property Information.



If you have existing sales information gather this together in a spreadsheet. Include full address details, date of sale and amount.

Sales


Documents and Images are an important resource that can be Attached to Valuation Events.



To allow Attachment as part of your implementation electronic files must be consistently identifiable as belonging to a given Valuation Job by their file name or enclosing folder name.

Attachments


Is your organisation's IT ready?



The Proficient IT Integrators Checklist is designed for your IT department or outsource provider. The Checklist must be reviewed and signed off.

Information Technology


Knowledge Management features allow the centralised storage of shared information.



If your Implementation includes Knowledge Management gather together examples of the type of Knowledge your organisation will store, along with a list of Knowledge Types to preset.


Knowledge

Make notes and write down any questions you may have here.



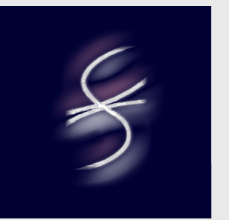
Questions? Notes?

Actions provide automation and workflow.



If your implementation includes Actions they will be designed around the Processes that are documented as part of your project. See "Getting Ready For Actions" for details.

Actions



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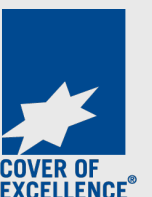
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Getting Ready For Proficient - Actions

Actions are designed to help you to do regular tasks more quickly and consistently. To get the best possible value out of your initial Actions setup, complete as many of the tasks in this worksheet as possible for review with your Consultant.

You should refer to any Processes that have been documented and optimised. Not all tasks may be necessary in your organisation, tasks do not need to be done in any particular order, and any can be undertaken separately at a later time.

Templates are documents that you use regularly as the basis for new documents. They can be any format necessary, including Word, Excel, Text, etc.

Gather together into one folder documents of this type. They will be used to set up **Template Actions**.

Document Templates

E mails Templates are standard e mails that you use regularly to send messages.

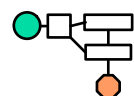
Gather together into one folder e mail templates, noting who each message is usually sent to, and text that should be inserted automatically for personalisation. These will be used to set up **E Mail Actions**.



E Mail Templates

Action Packs are groups of Actions that are applied in one go to be performed in order.


Review your processes to determine which could be improved through automation. Create lists of the Actions you will need. These lists will be used to set up **Action Packs**.



Action Packs

Standard Searches are searches you perform regularly.


Make a list of searches, including any search criteria that may need to be drawn from the Event from which the Action is started (ie "the same suburb"). These will be used to customise **Search Actions**.



Searches

Memos can contain prompts for annotations or notes that need to be made.


Create memo outlines including the title of the memo, and bullet-points of what should be included. These will be used to create **Memo Actions**.



Memos

Rules help to guide the Definition of Actions.


Consider rules around whether Actions prompt users before performing, which Actions a user is allowed to skip, which Actions should have follow-on Actions, and how the Event Status should change when the Action completes.



Rules

Stop Actions prevent other Actions from being performed.


Review your processes to determine at what point or under what circumstances a given Action or Action Pack should be Stopped. List these. The list will be used to set **Stop Actions**.



Stop Actions


Forms are active documents that populate your database as you type into them.

Review existing documents particularly those where information is entered twice - once in the Proficient software and once in the document. These will be reviewed when considering creating **Forms**.



Forms


Make notes and write down any questions you may have here.



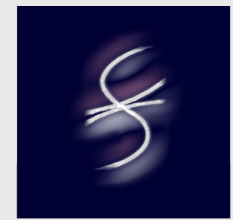
Questions? Notes?

Triggers apply Actions to Events when certain other things happen.

Review your processes to determine at what point a given Action or Action Pack should be applied to an Event. List these. The list will be used to set **Triggers**.



Triggers



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Getting Ready For Proficient - Migration - Job Numbers and Folders

Proficient is extremely flexible, but there are a few rules that need to be followed when preparing information to be brought across as part of your project. Consistency is the key to a successful change-over. This document contains guidelines to help you to prepare for a smooth migration.

Job Numbers in any existing tracking system you are using (such as a spreadsheet, database or Word document) should be *consistent*.

Ideally, the Job Number should contain only numbers. If it contains letters or punctuation as well, these will be converted during the migration. You will be able to search using both new and old style job references (with some exceptions).

If you have some job numbers that are out-of-step with your regular numbering schemes (such as those ending in "a,b or c" to indicate revaluations) you can create new numbers for these. If you do this, remember to change the name of the Job Folder if you have one.

1034	25	Pacific	Highway	Tuggera	NSW
1035	14	Banid	Street	Broadmeadows	NSW
1036	2	Gerrard	Lane	Penrith	NSW
1037	37	Bunty	Circuit	Emu Plains	NSW
1038	805	Mermaid	Court	Miami	QLD
1039	93	Longacre	Street	West Drayton	QLD

Moving forward you will be encouraged to number your jobs in the following format: 20101234, where the first digits are the current year and the last digits are the job reference.

It will be easy to locate a job by searching on the address or ID of a Property.

Job Numbering

Make notes and write down any questions you may have here.



Questions? Notes?

Job Folders on your server or computer must contain a unique reference and this must match the Job Reference in any existing tracking system you are using to be brought across successfully.

The Job Reference can appear anywhere in the Job Folder name, as long as it's *consistent* between Job Folders.

It may be possible to bring forward Job Folders where they contain only address or ID information, although this is not recommended. For details of how this information should appear, See Property Information below.

- 187426
- 187426 Lot 1 DP 345004
- 187426 Unit 1, 27 Longacre Street, West Drayton
- Lot 1 DP 345004 187426
- Unit 1, 27 Longacre Street, West Drayton 187426

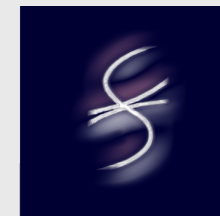
Moving forward, VALiD System creates Job Folders for you automatically, based on the Event (Job) Number, and uses an identical method for Sales.

Job Folders

Make notes and write down any questions you may have here.



Questions? Notes?



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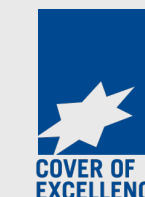
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Getting Ready For Proficient - Migration - Property Information

Proficient is extremely flexible, but there are a few rules that need to be followed when preparing information to be brought across as part of your project. Consistency is the key to a successful change-over. This document contains guidelines to help you to prepare for a smooth migration.

Property Identification in existing systems must be *consistent*. To be brought into Proficient, Property Information must contain either:

Consistently Completed Property Identification Information

Examples: Lot 7 DP23445 or Block 7 Plan 23445 or 7/23445, or in a spreadsheet as below:

Division	Division No	Plan	Plan No	Section/Portion	Folio
Lot	7	DP	23345		

Consistently Completed Address Information

Example: Ridgeback Hotel, 1/93 Longacre Street, West Drayton, NSW, 2320, Australia

Name	Unit No	Street No	Street Name	Street Type	Suburb	State	Postcode	Country
Ridgeback Hotel	1	93	Longacre	Street	West Drayton	NSW	2320	Australia

Tips for Cleaning Up Property Information

- Separate Unit and Street Numbers
- Do not use any punctuation
- Include information such as Shire, Locality, Parish if this information is collected
- Use only the first of a range of Street Numbers (so 12-14 becomes 12. Add a notes cell to show 12-14 or use the Folio cell)
- Use standard State abbreviations (NSW, VIC, WA, etc)
- Use full Street Type designations (Street, Circuit, Lane, Highway, etc)

Notes

- The minimum information that is needed to transfer information to the Proficient is Job Reference, Division and Plan information.
- Identification or Address information supplied in a free typed format may require more clean-up prior to import. This increases migration time.

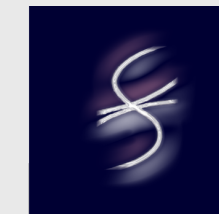
Moving forward, Proficient ensures that new Properties cannot be created unless they can be uniquely identified by Division and Plan or Address. It will also provide some ID and Address information automatically, such as Postcode.

Property Identification

Make notes and write down any questions you may have here.



Questions? Notes?



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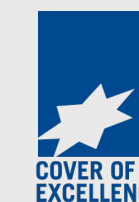
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