Welcome to the new look HubOnline

Training Sessions

If you would like to have a tour of the changes within HubOnline by one of our trainers after reading through this document, please click on one of the following links below to join a web based training session. Please do this approximately 5 minutes before the session commences.

Session 1

10:30am (EDST) Wednesday 1 April 2009

https://www1.gotomeeting.com/join/683200829

Telephone Conference Line:

1800 500 364 (Australia)

0800 443 119 (New Zealand)

Participant Passcode:

285576

Session 2

2:00pm (EDST) Wednesday 1 April 2009

https://www1.gotomeeting.com/join/300842818

Telephone Conference Line:

1800 500 364

0800 443 119 (New Zealand)

Participant Passcode:

285576

If you are unable to attend one of these sessions or would like some additional HubOnline training for your office, please email **training@hubonline.com.au** and we will contact you with further information.

Previous HubOnline:

New HubOnline:

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Previous Top Menu:

New Top Menu:

Top Menu Changes:

1) "Important News" link removed
2) "Logged in as" details moved to the right
3) Feedback link added

Feedback Link:

- Allows you to enter and vote on changes and ideas within HubOnline
- Only accessible to users after they have logged in successfully
- Users are allocated 10 points which they can put towards new or existing suggestions

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Previous Dashboard:

◄◄ ◄	March 2009	► ►►
	Jan Feb **Mar** Apr May Jun	
	Jul Aug Sep Oct Nov Dec	

S	M	T	W	T	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

IMPORTANT NEWS

24 - March - 2009

HubOnline Herald - Monthly Newsletter for HubOnline Customers

HubOnline is pleased to announce the commencement of publication of our new monthly customer newsletter - the HubOnline Herald

More News...

MY DIARY   Monday, March 30, 2009   Add new entry

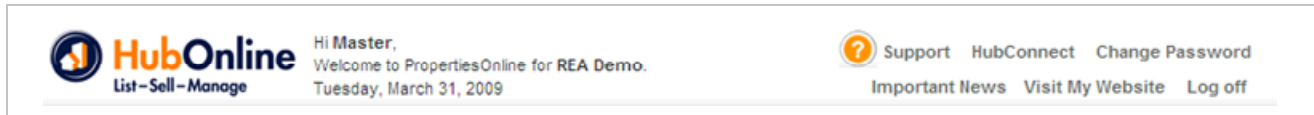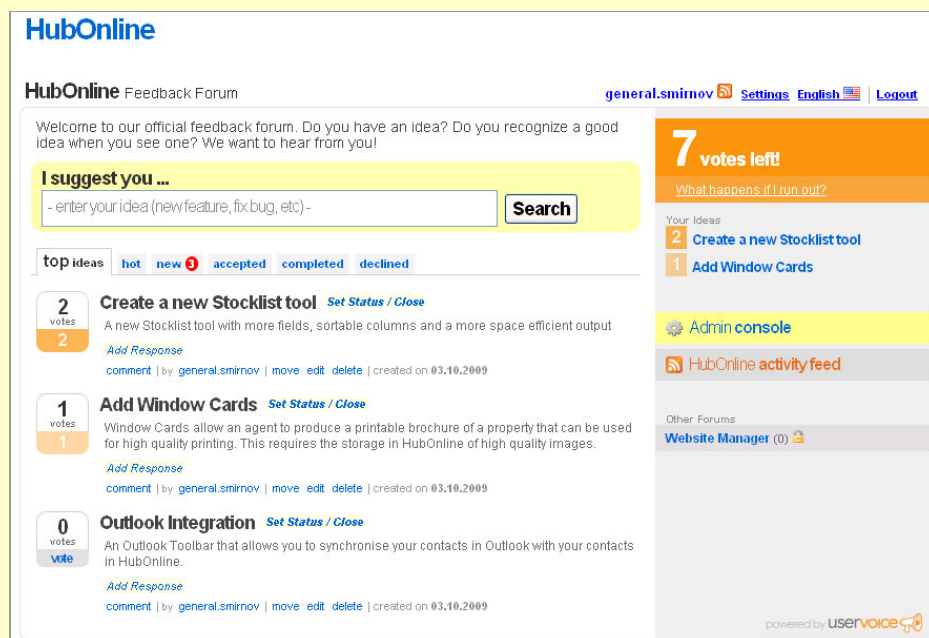There are no diary entries for this day.

NEWLY REGISTERED CONTACTS (2)

PROPERTY TASKS Overdue (92) (*) a recurring task

CONTACT TASKS Overdue (16) (*) a recurring task

GENERAL TASKS Overdue (1) (*) a recurring task

SCHEDULED PROPERTIES TO BE SENT (27)

New Dashboard:

PROPERTY SEARCH

Property No.	
Address	
Property Type	All Property Types
Sale Method	All Sale Methods

Search

NEW!

IMPORTANT NEWS

10 - March - 2009

Very Important notice - Total system upgrade

Trademe.co.nz recently made modifications to their xml feed schema. Consequently, it became necessary for us to make some minor enhancements to our portal export tool.

Enhancements:

More News...

MY DIARY: Tuesday, March 31, 2009   Add new entry

There are no diary entries for this day.

LAST UPDATED PROPERTIES   ← **NEW!**

NEWLY REGISTERED CONTACTS (13)

PROPERTY TASKS Overdue (92) (*) a recurring task

CONTACT TASKS Overdue (47) (*) a recurring task

GENERAL TASKS Overdue (2) (*) a recurring task

SCHEDULED PROPERTIES TO BE SENT (163)

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Dashboard Changes:

1) Property Search feature →

PROPERTY SEARCH
Property No.
Address
Property Type — All Property Types
Sale Method — All Sale Methods
Search

2) Last Updated Properties

- Shows the last properties that were created / updated
- Includes **quick links** to commonly used editing pages

Quick links

HubOnline Menu Changes

For Sale
Residential
Luxury Residential
Commercial
Rural
Property Overview
Land
Project Marketing
Business
Manage Special Features
Manage Auction Venues

For Lease
Residential
Luxury Residential
Commercial
Holiday Rentals
Property Overview
Land
Project Marketing

Sold / Leased
Search / Report All
Residential
• Settled
• Leased
• Withdrawn
• Archived

For Sale; For Lease; Sold / Leased

- Side menu now reads **For Sale and For Lease**
- **List / Edit** properties removed from side menu (click **Residential** etc down side menu to display list of properties)
- **Add property** removed from side menu (but still exists in property screen, as per below screenshot in red
- Can now search for properties by **Status** using the Status drop down menu on the search page, as shown below in red

Sold / Leased:

- No change to this section

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Contacts

Contacts

- **Contact Task Manager** has moved to **My Office**
- **Email Reports** (to track e-newsletter campaign success) has moved to **Reports and Logs**
- Name change of **Image Library** to **Newsletter Image Library**
- **Log Search** has moved to **Reports and Logs**

Contacts menu:
- Contact Management
- Contact Search
- My Diary
- Newsletter Image Library
- Manage Contact Sources
- Manage Categories
- Import CSV

Contacts (expanded):
- Contact Management
- My Diary
- Contact Search
- Email Reports
- Image Library
- Log Search
- Contact Source
- Manage Categories
- Import CSV
- List Inspections
- **Contact Task Manager**
- Manage Tasks Actions
- Manage Contact Group Tasks
- View Contact Tasks

My Website

My Website

- **Document Library** is now in this area *(previously under **Franchise Tools**)*
- **Staff** section has moved to **My Office**
- **Administration: Edit Office Details** has moved to **My Office**
- **Visitor Reports** have moved to **Reports and Logs**
- **Stocklist Report** has moved to **Reports and Logs**

My Website menu:
- Property of the week
- Property Search
- Dynamic Pages
- Testimonials
- Latest News
- Industry News
- Career Centre
- Useful Links
- Suburb Profiles
- Document Library
  - Add A New Document
  - Edit Documents
  - Manage Categories

My Website (expanded):
- **Administration**
  - Edit Office Details
- **Property of the Week**
  - Property of the week
- **Property Search**
  - Property Search
- **Visitor Reports**
  - Property visits by category
  - Individual property visits
- **Stocklist Reports**
  - Stocklist report
  - Stocklist CSV Export
- **Staff**
  - Add Staff Member
  - Edit Active Staff
  - Edit Archived Staff
  - Manage Staff Roles
  - Manage Staff Categories
  - Staff Search
  - Email Reports
  - SMS Allocation
  - Contact/Staff Reassignment
- **Dynamic Pages**
  - Edit Page Content
  - Add/Edit Testimonial
- **Newsletter**
  - Add a Newsletter
  - Edit Newsletters
  - Add an Industry News
  - Edit Industry News
- **Career Centre**

Export

Export

- Spelling change from **Xport** to **Export**

Export menu:
- Export Details
- ExportOnline

Xport (expanded):
- Your Details
- XportOnline

Franchise Tools

Franchise Tools

- No change to this section

Franchise Tools menu:
- **End Of Month Reports**
  - Property Management Figures
  - EOM Unconditional Sales Report
  - EOM Released Sales Report
  - EOM Outstanding Settlements
- **Document Library**
  - Add A New Document
  - Edit Documents
  - Manage Categories
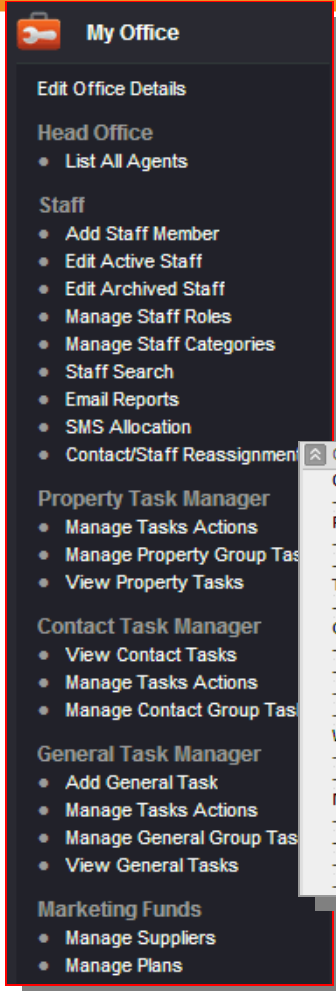 - View H/O Documents

Franchise Tools (expanded):
- **End Of Month Reports**
  - Property Management Figures
  - EOM Unconditional Sales Report
  - EOM Released Sales Report
  - EOM Outstanding Settlements
- **Document Library**
  - Add A New Document
  - Edit Documents
  - Manage Categories
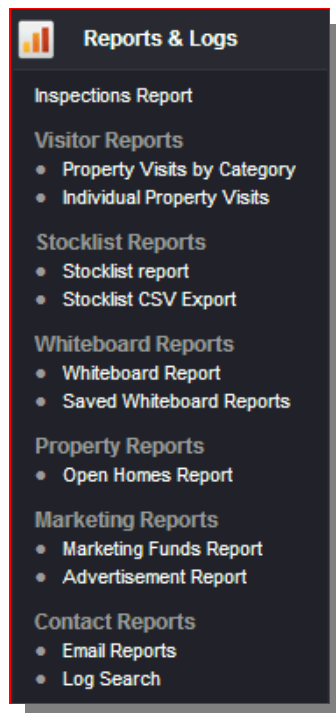 - View Office Documents
  - View H/O Documents

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My Office

My Office

Edit Office Details

Head Office
- List All Agents

Staff
- Add Staff Member
- Edit Active Staff
- Edit Archived Staff
- Manage Staff Roles
- Manage Staff Categories
- Staff Search
- Email Reports
- SMS Allocation
- Contact/Staff Reassignment

Property Task Manager
- Manage Tasks Actions
- Manage Property Group Tas
- View Property Tasks

Contact Task Manager
- View Contact Tasks
- Manage Tasks Actions
- Manage Contact Group Tas

General Task Manager
- Add General Task
- Manage Tasks Actions
- Manage General Group Tas
- View General Tasks

Marketing Funds
- Manage Suppliers
- Manage Plans

Office

Open Homes Report
- Open Homes Report

Property Task Manager
- Manage Tasks Actions
- Manage Property Group Tasks
- View Property Tasks

General Task Manager
- Add General Task
- Manage Tasks Actions
- Manage General Group Tasks
- View General Tasks

Whiteboard
- Whiteboard Summary
- Manage Saved Reports

Marketing Funds
- Manage Suppliers
- Manage Plans
- Marketing Funds Report
- Advertisement Report

- **Staff category** is now in this area *(previously under My Website)*
- **Contact Task Manager** is now in this area *(previously under Contacts)*
- **Edit Office Details** is now in this area *(previously under My Website)*
- **Whiteboard Reports** have moved to **Reports and Logs**
- **Open Homes Report** has moved to **Reports and Logs**
- **Marketing Funds Summary Report has** moved to **Reports and Logs**
- **Advertisement Report** has moved to **Reports and Logs**

Reports & Logs

NEW!

Reports and Logs

Inspections Report

Visitor Reports
- Property Visits by Category
- Individual Property Visits

Stocklist Reports
- Stocklist report
- Stocklist CSV Export

Whiteboard Reports
- Whiteboard Report
- Saved Whiteboard Reports

Property Reports
- Open Homes Report

Marketing Reports
- Marketing Funds Report
- Advertisement Report

Contact Reports
- Email Reports
- Log Search

- **Visitor Reports** are now in this area *(previously under My Website)*
- **Stocklist Report** is now in this area *(previously under My Website)*
- **Stocklist CSV Export** is now in this area *(previously under My Website)*
- **Whiteboard Reports** are now in this *area (previously under My Website)*
- **Property Reports** (Open Homes Report) is now in this area *(previously under Office)*
- **Marketing Reports** (Marketing Funds Summary Report and Advertisement Report) is now in this area *(previously under Office)*
- **Inspections Report** is now in this area *(previously under Contacts)*
- **Contact Reports** are now in this area *(previously under Contacts)*

Whiteboard Reports

- Whiteboard Report feature is now easier to use with simple steps and filters to assist in generating reports
- Help text is provided for a better understanding of report content
- Reports are generated as follows:

Step 1:

Step 1: Please select a Report Type

Office

- Select Report Type
- Summaries
- Contacts
- Office
- Property
- Region
- Sales_Person

Help text

Office

Track success of your business across multi offices with the following reports (all within a selected date range):
- Comparison of total listings between your offices this year compared with last year
- Comparison of sold and settled properties between your offices for this year compared with last year
- Number of sales per office showing total gross commission for each
- Clearance rate report for all offices for this year compared with last year
- Outcome by auction date report showing number of auction listings per office compared with last year

Step 2:

Step 2: Please select a Report:

Select Report

- Select Report
- (1) Clearance Rate Per Office (Comparison)
- (28) Outcome by Auction Date

Step 3:

Step 3: Please select a Date Range

○ Quick Date   This Month

○ Start Date   1   Mar   2009
   End Date   31   Mar   2009

Step 4:

Step 4: Please select a Filter if required

Region   All selected...

Office   All selected...
           POL Demo Head Office
           REA Contact
           REA Demo
           REA Renae

Suburb   All selected...
           ABBOTSBURY
           ACACIA RIDGE
           ADAMSTOWN
           ADELAIDE
           ALBANY CREEK
           ALBURY

Category   Commercial
           Rural
           Land
           Property Overview
           Holiday Rental

Step 5:

Step 5: Would you like to save this report

Save Report   ☐

Generate Report

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