Guide

Simple steps to onboard with SEE IT HERE FIRST

By See It Here First

SEE IT HERE FIRST.co.uk

Contents

Introduction.

We're pleased to have you with us! Now you have signed your terms of business here are the steps to get you started.

We've streamlined our onboarding process for your ease, allowing you to get started quickly and efficiently.

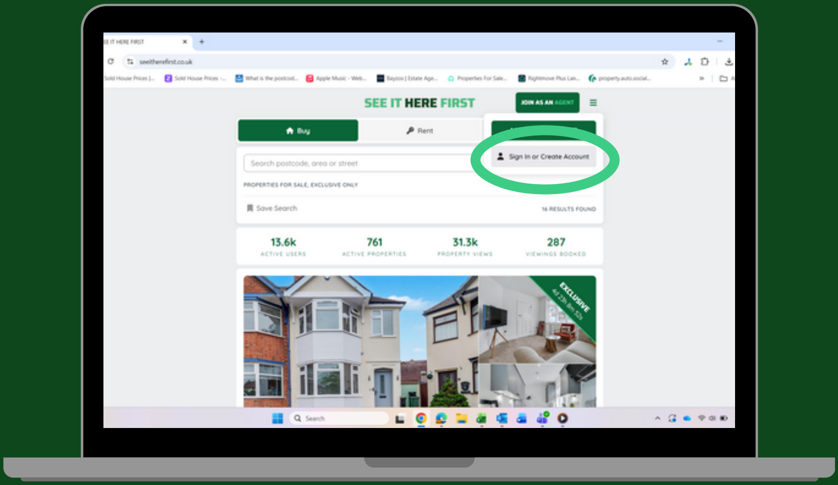
This comprehensive guide will walk you through each step of integrating your business, ensuring a seamless experience.

Please note, this is best completed on a desktop or laptop

We value your input—please feel free to share any feedback with our team: hello@seeitherefirst.co.uk

Registering your email.

Step 1:
If you don't already have an account register your email address with SEE IT HERE FIRST at https://seeitherefirst.co.uk



Step 2:
Send an email to hello@seeitherefirst.co.uk , letting them know which email you used and confirming your CRM details. Agent account activation is typically completed within 24-48 hours.

Setting up your CRM & agent account.

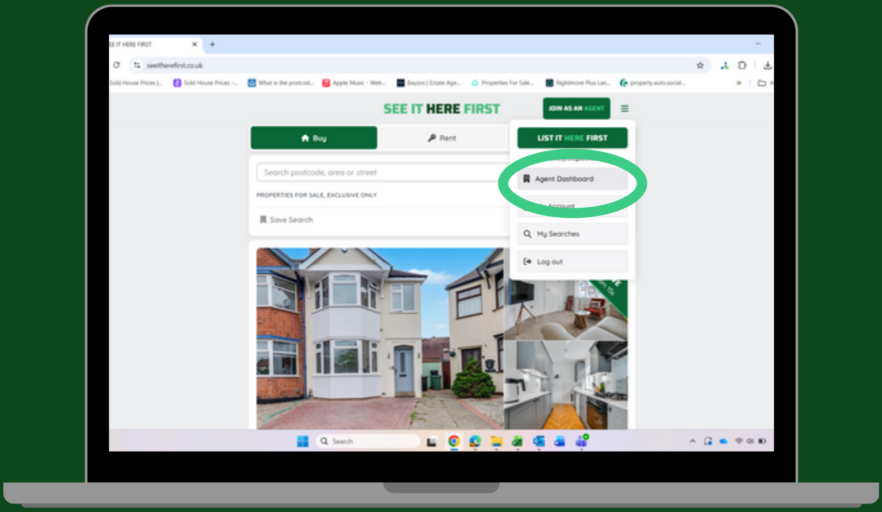
Step 3:

We know data feeds can be confusing, so we've made a simple 'Agent CRM Integration' guide to help you find the right information and set things up correctly. When you are at this step, our team will send it through, ensuring you have the support you need.

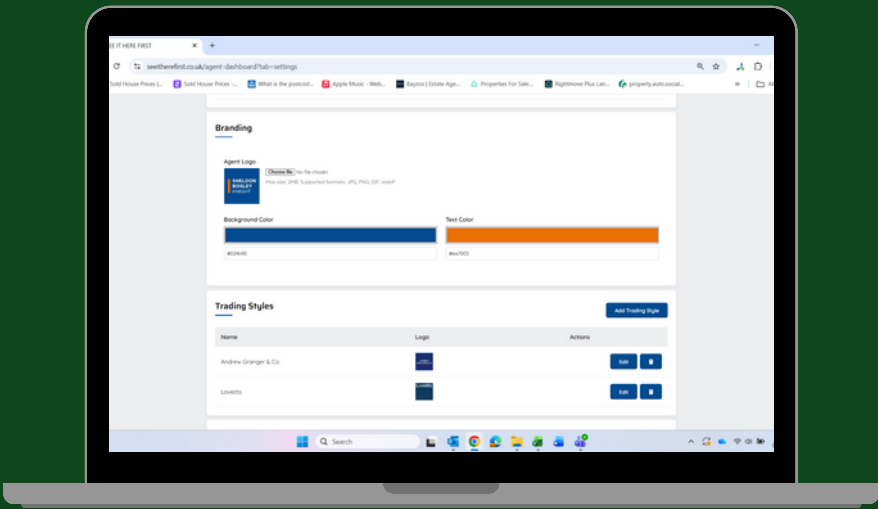
Logging into your agent account.

Step 4:

Your account is ready! To log in, head to the menu and click on "Agent Dashboard." If you don't see it, just refresh the page.



Setting your agent branding.



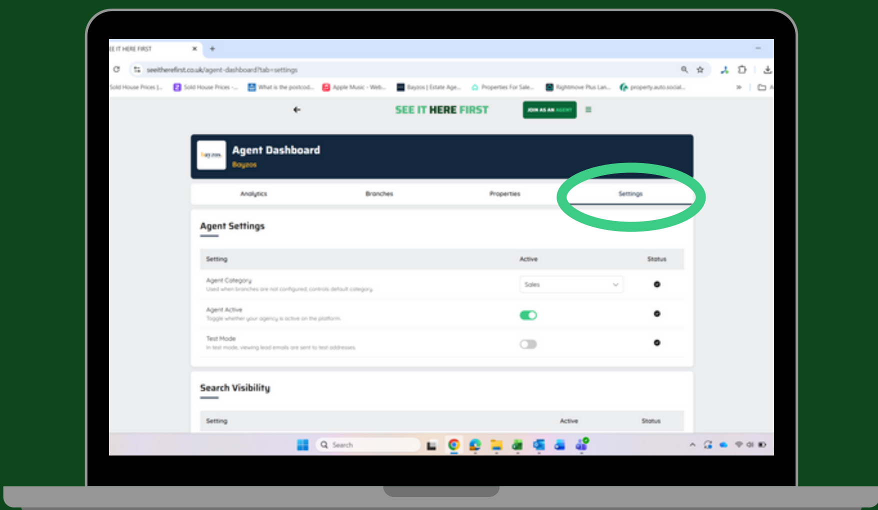
Step 5:

Set your default branding. This involves establishing a consistent visual and messaging identity that represents your business. If your business operates multiple branches, each with its own distinct branding you can manage these variations using "trading styles." This feature allows you to customize how each branch presents itself to its specific market while maintaining an overarching brand identity.

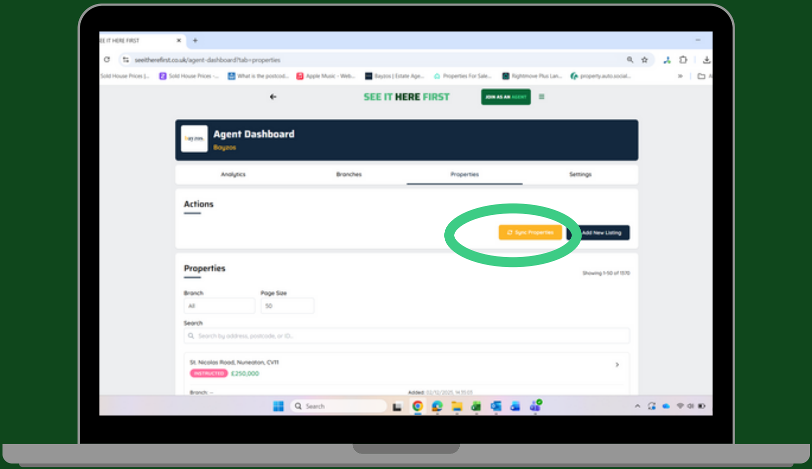
Configuring your settings.

Step 6:

Now that you're on the agent dashboard, it's time to set up your agent settings. To do this smoothly, you will need to have the necessary details from step 3.



Time to upload your properties.



Step 7:

Now that your account is set up, it's time to sync your properties. Head over to the property tab on your agent dashboard and click the "Sync Properties" button. If everything loads smoothly, just wait for it to finish. This important step validates your connections and speeds up the onboarding process.

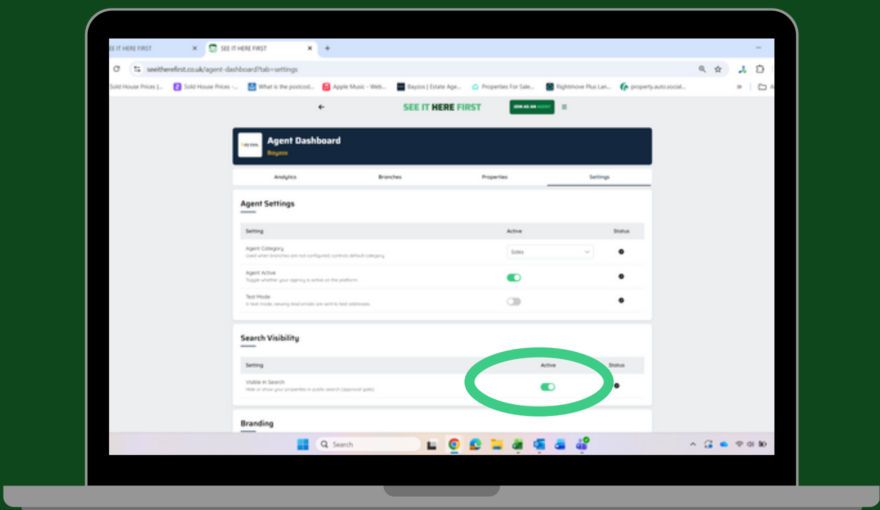
Once you're set, your properties will automatically sync twice a day, keeping everything up to date effortlessly.

Time to go live.

Step 8:

Check the property details to make sure everything is correct. Once you're happy, go back to the settings page on the agent dashboard.

Scroll down a little to find the search visibility section and slide the toggle to green. This means your properties are now visible in search results.



Checking your live properties

Step 9:

To ensure your property is visible, follow these simple checks:

For the street check:

- Look for a property with images in the agent dashboard properties list, located in the instructed state. Then, try searching for it on the main "SEE IT HERE FIRST" page.

For the alto check:

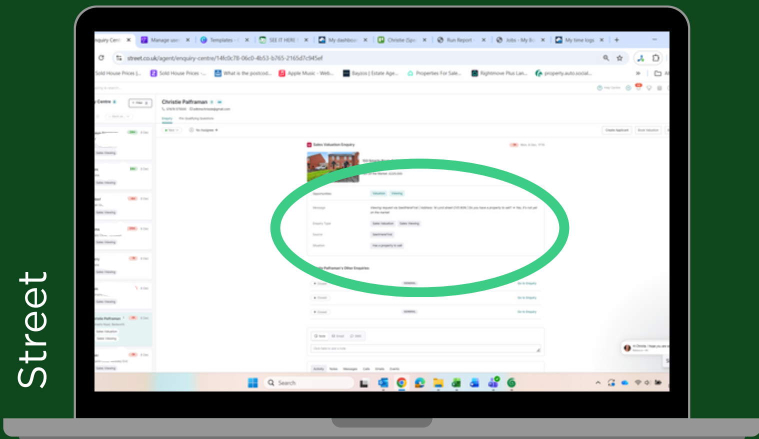
- Find a property that is marked as for sale. Search for this property on the main "SEE IT HERE FIRST" page.

Main SEE IT HERE FIRST PAGE

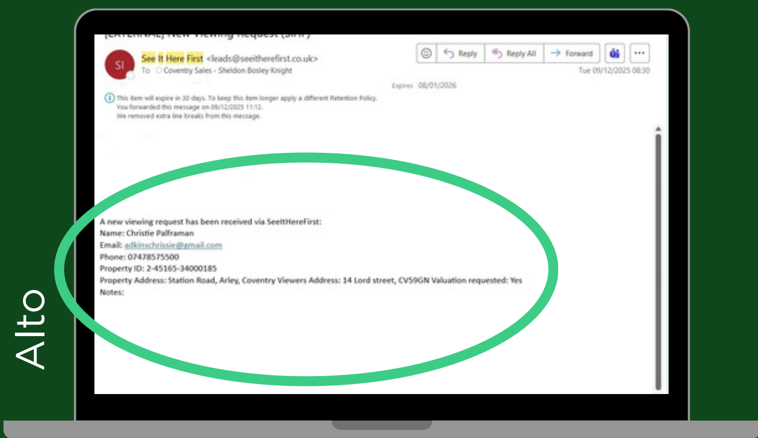
Getting your first enquiry

Once you've discovered a live property, go ahead and send yourself an enquiry. Below, you'll see how this appears both on the street and in Alto. Make sure to keep a close eye when a valuation is requested.

Street



Alto



Final message from the team.

Congratulations on completing the onboarding process! We're absolutely thrilled to have been part of your journey and can't wait to see what you achieve.

Now that your account is fully operational, we're excited to watch your business grow and thrive.

We understand that starting something new can be both exciting and overwhelming, so we're here to support you every step of the way.

If you have any questions or need assistance, don't hesitate to reach out—the team are happy to help!

- THE SEE IT HERE FIRST TEAM

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