PropertyDrive

User Manual

Getting *more* out of PropertyDrive!

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Table of Contents

Property Search

Find a Listing on PropertyDrive

Searches are available for the general public and PropertyDrive members. You can search properties for sale or for lease including buildings, land and businesses.

There are two easy and quick ways to find listings on PropertyDrive: You may enter your address or zip code in the search bar on the Home page or on the Search Listings page and click on the 🔍 to populate listings. Further narrow search results using our filters detailed on the following pages.
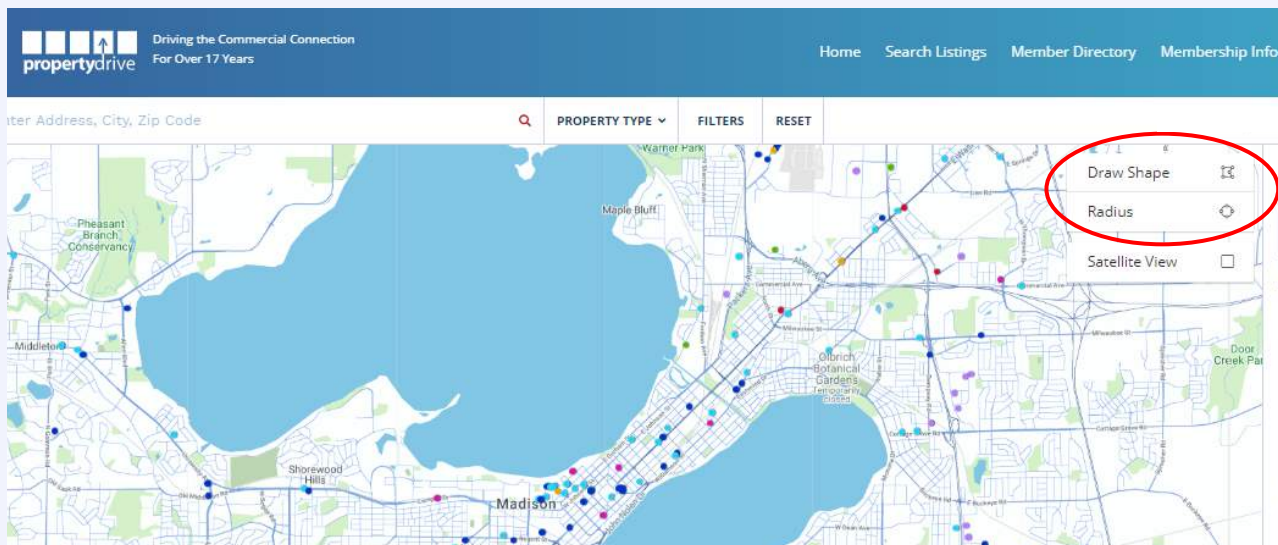

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Property Search

Draw Shape or Radius

Use our Draw Shape and Radius tools to search specific areas on the map. Simply select one of the two tools and use your mouse cursor to draw your shape or radius on the map.

Quick Tip: You can apply filters to narrow down your search results. Our interactive map allows you to filter by property type, size, and price. PropertyDrive members have additional filters available to them when logged into their account.

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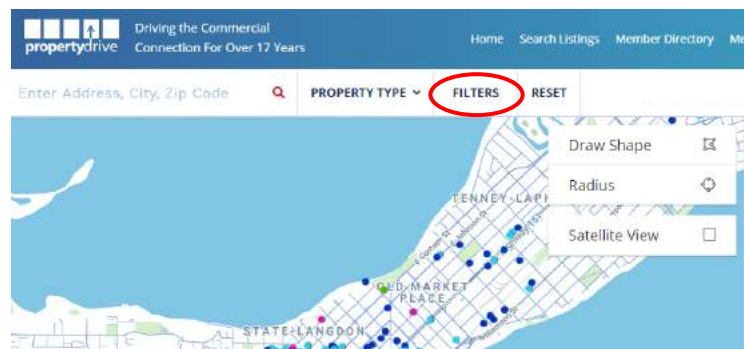
Property Search

Search Results

Search results are displayed on the right side of your screen. Clicking on a listing will take you to the listing detail page and show you the contact information for the listing broker.
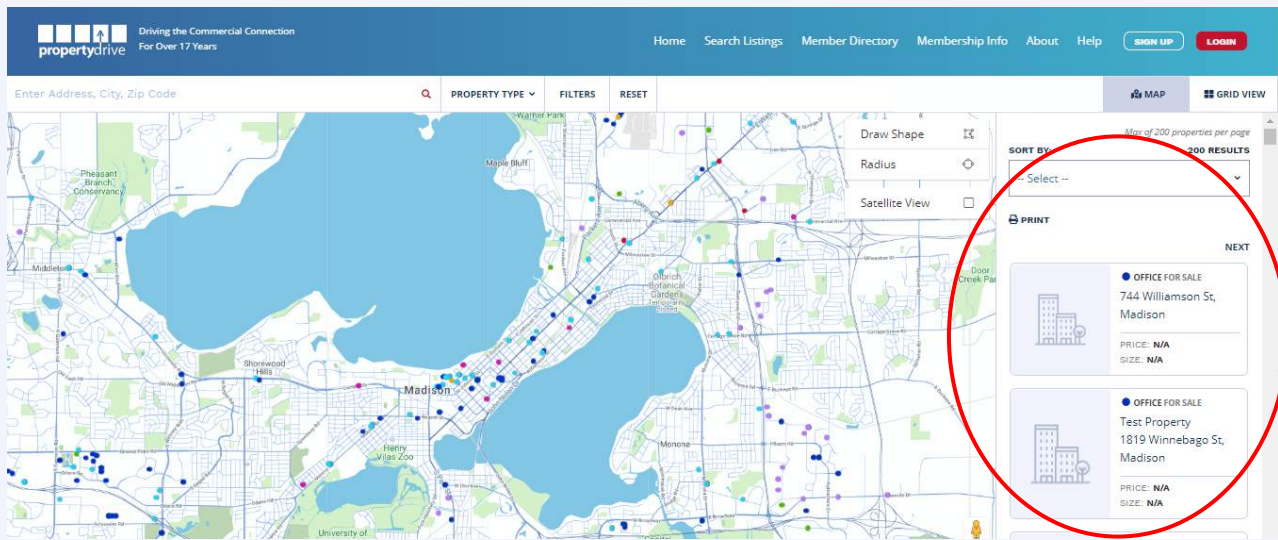
You can click on **GRID VIEW** for a different view of the search results and to see photos in larger detail.

Property Search

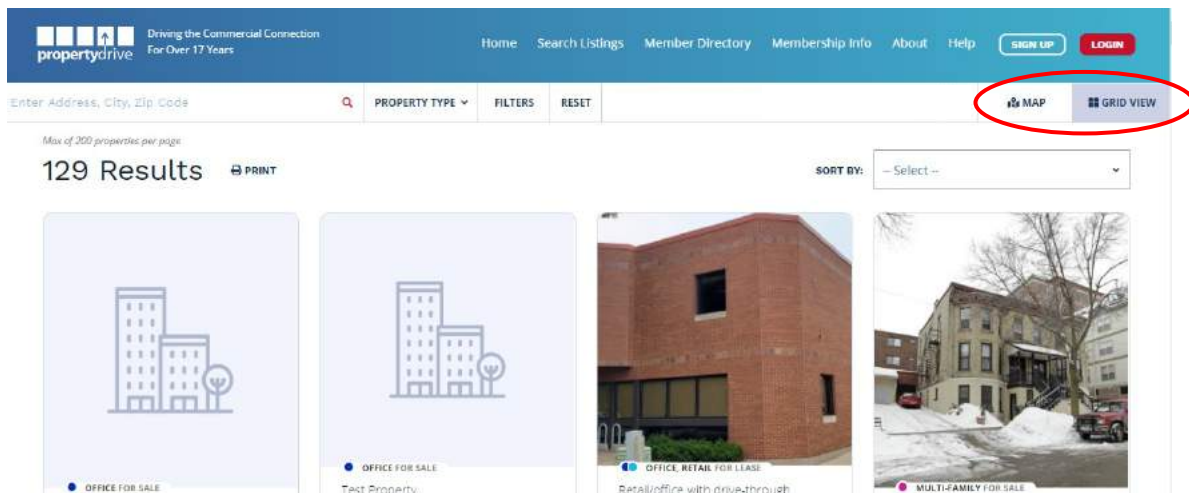## *General Searching Tips*

- Our interactive map lets you search by address, zip code, property listing ID, keywords, etc. You can also use our filters, such as "For Sale," "For Lease," "Office," "Retail," etc. to further narrow down your search. The draw shape and radius functions allow you to select a specific area on the map.

- Our new keyword search feature searches the entire PropertyDrive site to pull any listing containing the specific phrase entered. For example, if you are looking for a restaurant for sale, simply type the word "restaurant" into the keyword search to see any listings that contain this keyword.

- You may use as many or as few criteria as you wish to make your search more or less specific. Fewer criteria will return more properties. The success of detailed searches is dependent on the amount of information entered by the listing agent.

- If you are searching for a specific value instead of a range, you only need to fill in the minimum field on any search. For example, if you are searching for a warehouse with a size of exactly 10,000 sf, simply enter "10,000" as your minimum size and click the search button.
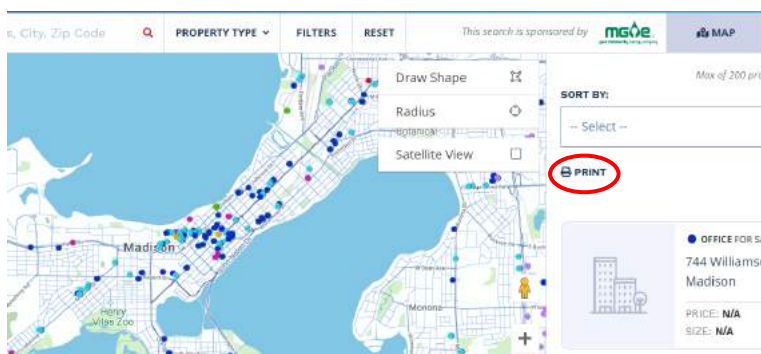
Quick Tip: You can print your search results directly from the search page by clicking the "Print" button.

Your document will automatically include property description for all properties.

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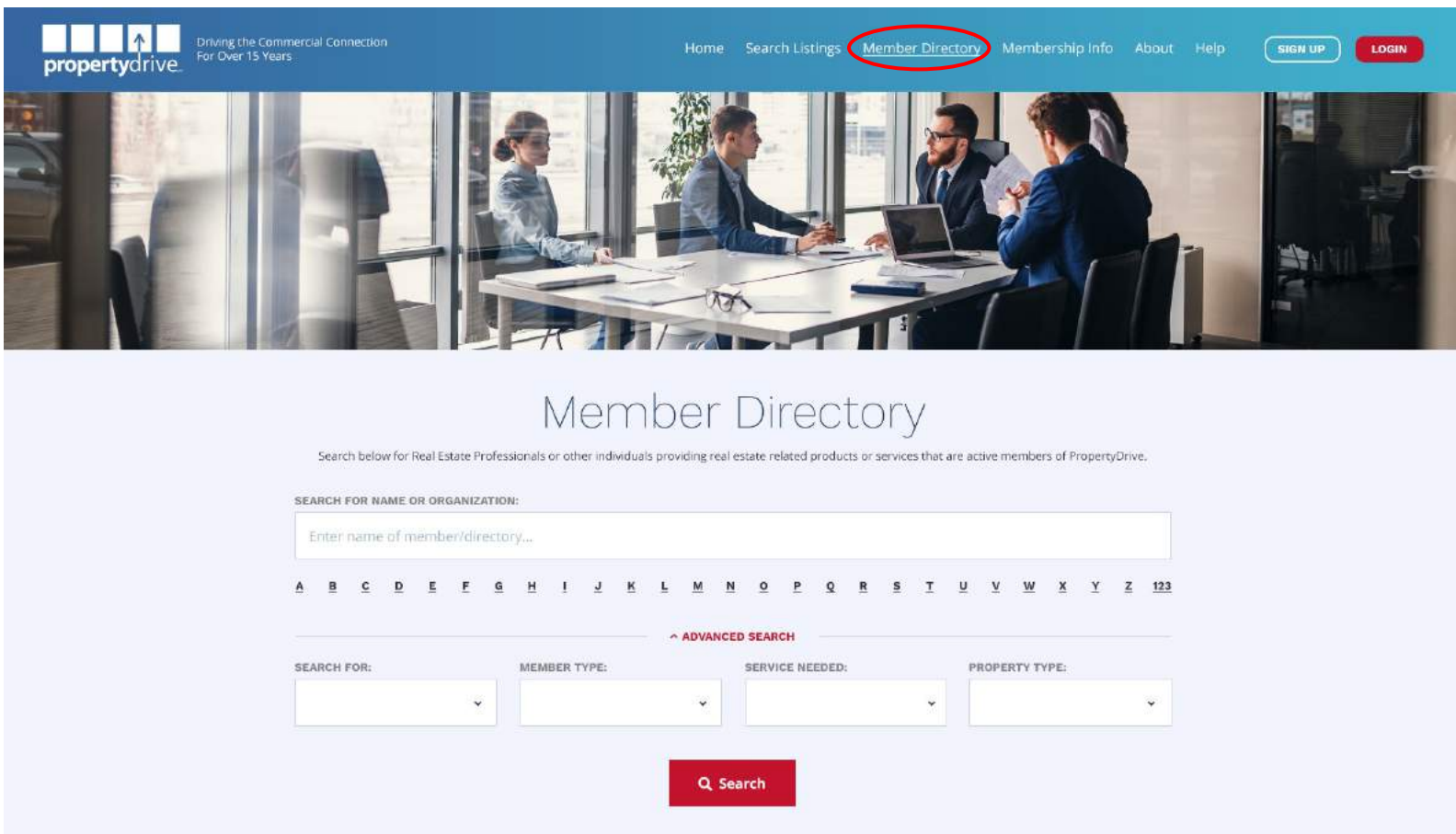
Member Directory

Find a Company or Agent

Our Member Directory allows you to find a company or agent in your area who can work with you on your real estate projects.

To use this search, click on the Member Directory. Enter the agent or company name in the search bar or search alphabetically by clicking on the letter that the company name or agent's last name starts with.

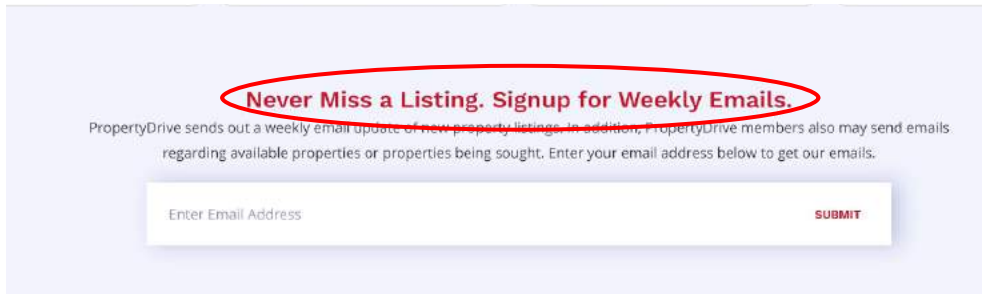Quick Tip: You can use the advanced filters to narrow down the search results as needed.

Email Subscriptions

Sign up for our Mailing List

Receive our Broadcast and Weekly New Listing Emails by signing up to our mailing list directly on our Home page. Members will automatically get enrolled when they sign up for their membership.

Quick Tip: When you set up a membership, you will automatically be subscribed to our mailing list. See Edit your Account to read about how to adjust your email preferences.

Update your Email Preferences

To update your email preferences, please simply select "Update Preferences" or "Unsubscribe" at the bottom of the email. If you are a PropertyDrive member, you can also access these preferences by logging into your account an selecting "Edit My Account" and then "Update Preferences."

For Members

Log into your PropertyDrive Account

If you don't have a PropertyDrive account set up, please visit our signup page to get started.

To access your account, please visit PropertyDrive.com and click on LOGIN in the upper right corner of the page to get to the login screen. Here, you may enter your username and password and click on login.

Quick Tip: If you forgot your username or password, click on "Forgot Username or Password?" next to the login button to reset your login credentials.
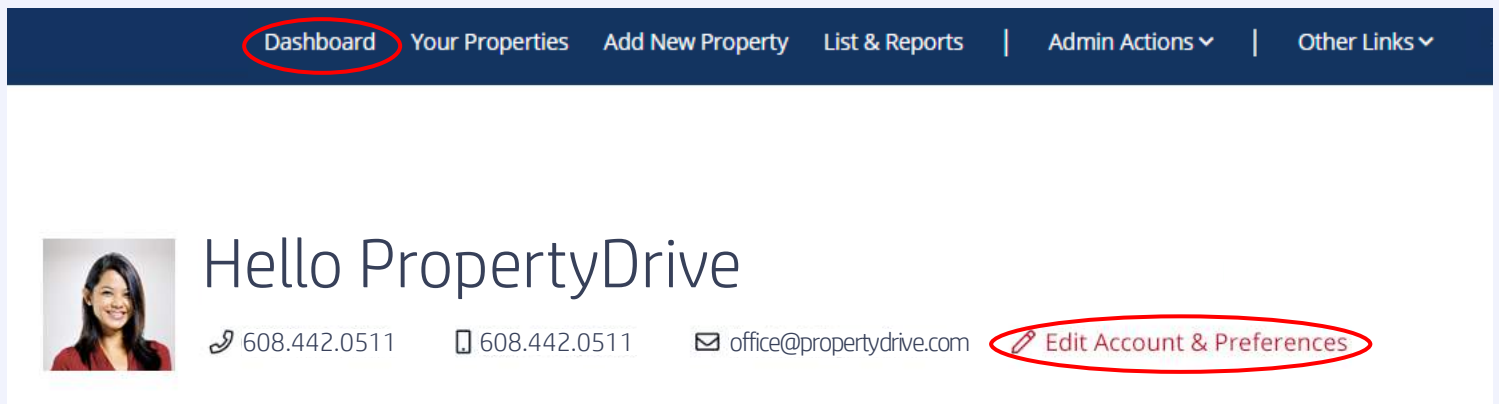
For Members

Account Overview

Each company has two different access levels for their PropertyDrive account— the agent level and the company administrator level. Agents have access to their own information and properties. Company administrators can add agents to the company account, change or delete properties for agents, create reports for them, send broadcasts in their agents' names, and edit and update the company profile and information.

Edit your Account

To edit your account, please click ✎ Edit Account & Preferences on your Dashboard. This will open your account settings, where you can update your information, set your email preferences, and more. Don't forget to click the **SAVE** button when you are finished updating your profile.
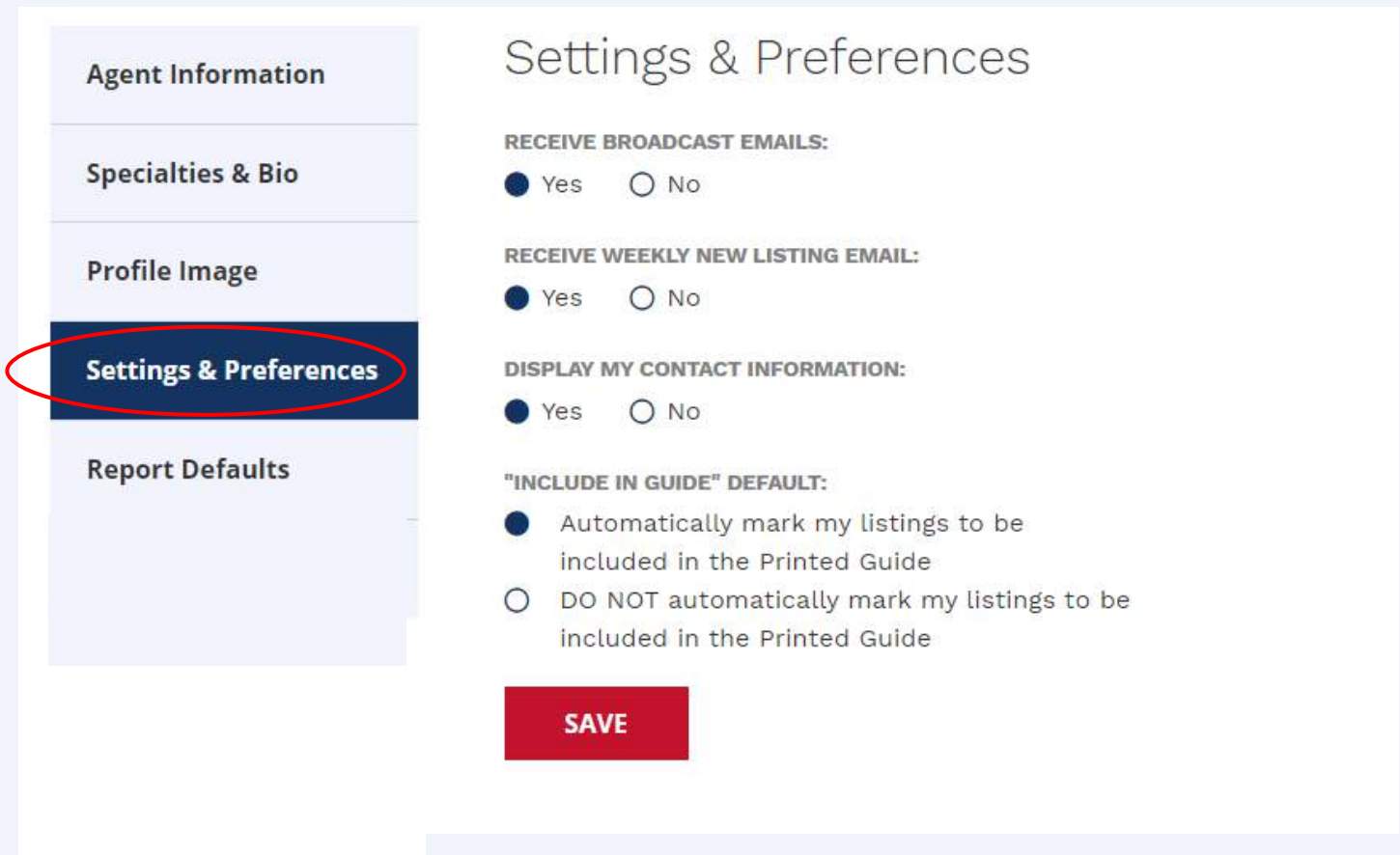
Dashboard   Your Properties   Add New Property   List & Reports | Admin Actions ⌄ | Other Links ⌄

Hello PropertyDrive

📞 608.442.0511   📱 608.442.0511   ✉ office@propertydrive.com   ✎ Edit Account & Preferences

For Members

Update your Settings and Preferences

In your account settings, you will also have the option to update your email preferences and other settings, such as whether you would like to display your contact information in our Member Directory and whether you'd like to automatically include all of your listings in the CIREX Printed Guide.

For Members

Update your Report Defaults

You can also set and update your default preferences for Reports directly in your account preferences. You can choose defaults for including report sections such as a cover page, a summary page, etc. You can also choose a default footer and other default information. You will always have the option to override these defaults on a case-by-case basis for each individual report you create.

For Members

Manage Company/Manage Agents

Only company administrators have access to this tool. Use this feature to edit your company information and update your agents' profiles. You can access your company's and agents' accounts under the "Admin Actions" in your navigation bar or directly from your dashboard.

Quick Tip: You can choose to have your company name appear under a different letter in the directory by entering a different sort name. For example, to have *The Jones Company* appear under J in the member directory, simply enter *Jones Company* as the company sort name.

For Members

Update your Company Information

Only company administrators are authorized to update the company information. You can update your company information, including your business address, website links, and contact information. Simply click the **SAVE** button when you are finished and your information will automatically be loaded to your company profile online.

For Members

Update your Billing Information

Only company administrators are authorized to update the company's billing information. Click the **SAVE** button once you've entered your billing information to save your changes.

> **Quick Tip:** All our invoices are sent by email; be sure to add our email address office@propertydrive.com to your save sender list to ensure that you receive our invoices.
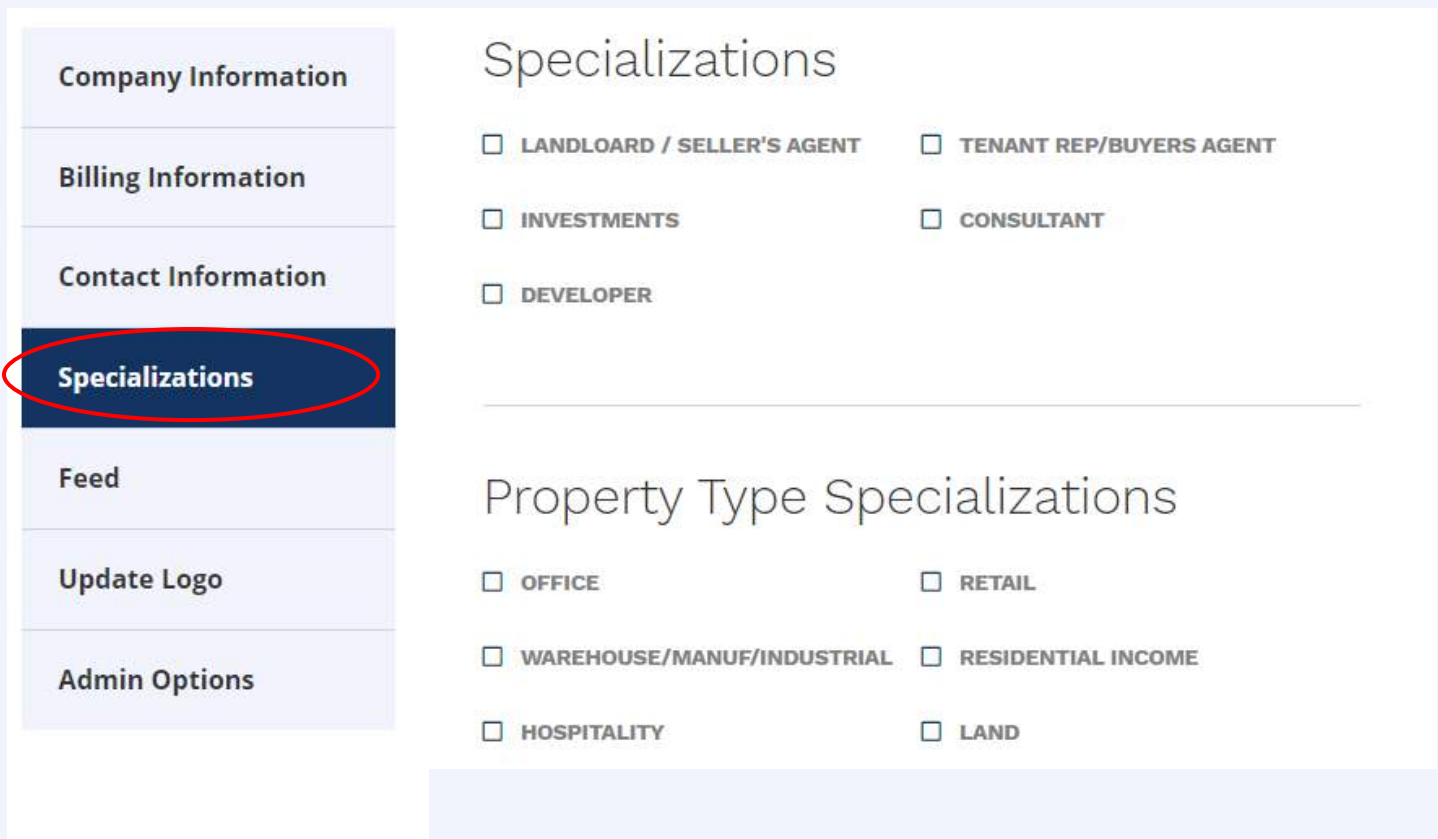
For Members

Update your Specializations

Check your areas of expertise under the Specializations tab to have this information displayed on your company profile page. This information will assist those looking for companies or agents in our Member Directory.

For Members

Your PropertyFeed

Our PropertyFeed allows you to display your PropertyDrive listings directly on your company website. If you signed up for our PropertyFeed, you can access your feed information directly in your company settings. Simply copy the provided code and past it inside the <BODY> tag of the web page on your website that is designated for your listings. Once your feed has been set up, your PropertyDrive listings will appear automatically. If you make a change to one of your listings on PropertyDrive, this change will automatically be updated on your website in real time.
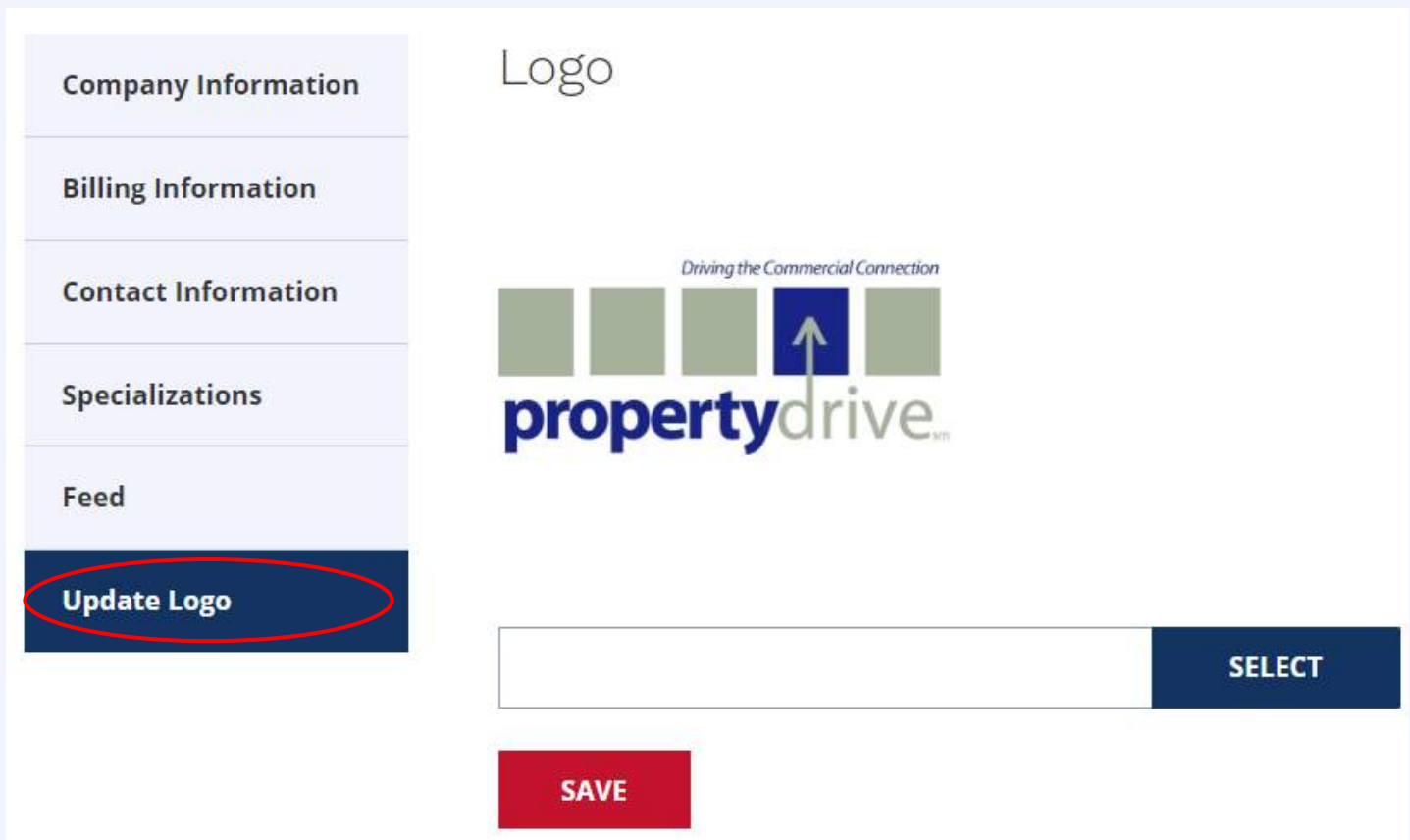
For Members

Update your Company Logo

Only company administrators are authorized to update the company logo. You can upload a company logo by clicking on the Logo button under manage company.

Click on **SELECT** to find your logo file and then click on **SAVE** to upload the logo. It will be sized automatically.
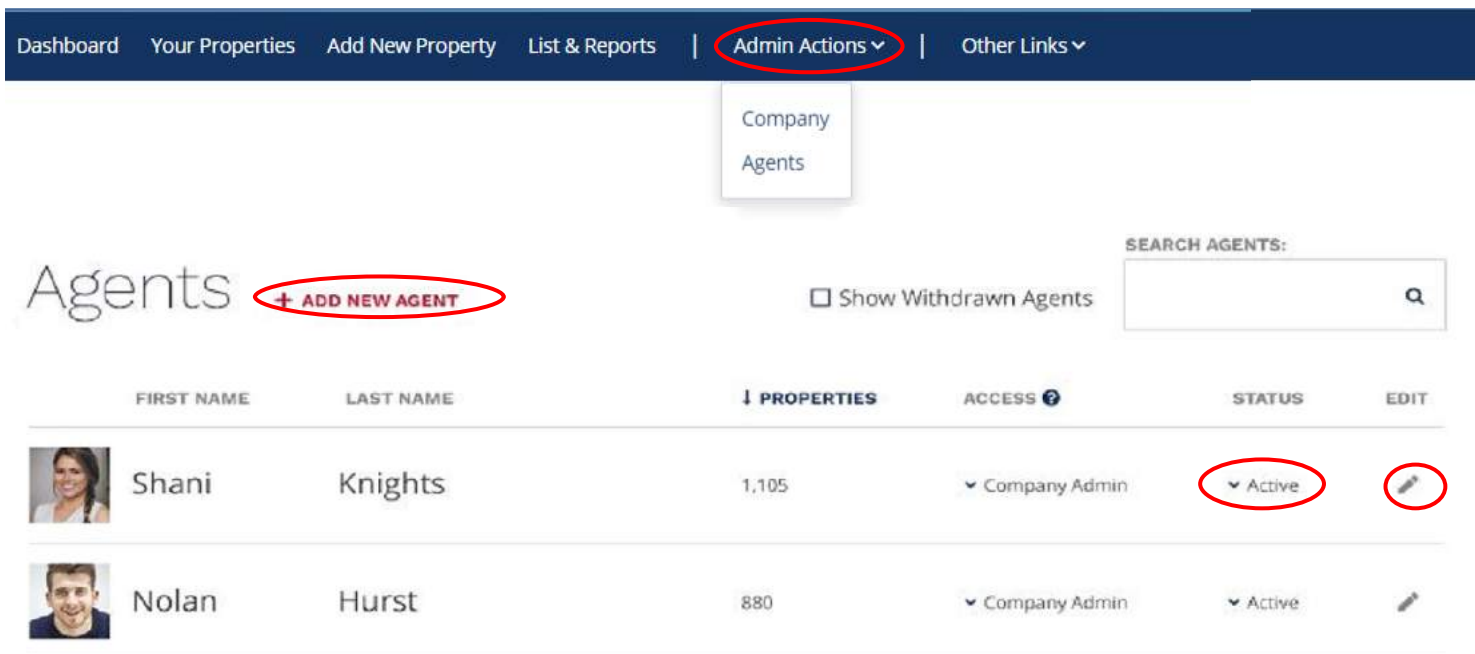
For Members

Edit an Agent

To edit your own Agent account, please follow these instructions. As a company administrator, you can manage your agents' accounts. On the agent screen, select the ✎ to the left of the agent's name to get to the agent's account settings. You may update any agent information. Don't forget to click the **SAVE** button

Add/Delete an Agent

To add an agent, simply click on **+ ADD NEW AGENT** under the agent tab and walk through the setup steps.

To delete an agent, simply change the agent's status from *Active* to *Withdrawn*.

IMPORTANT: You must re-assign an agents active properties (see View/Edit a Property) BEFORE deleting the agent, if you want to keep these listings active under a different agent's account. Please contact us for assistance.

For Members

Add a Property

Click on **+ ADD NEW PROPERTY** under the Your Properties tab and fill out the form in the next window. Click the **SAVE** button when you are finished filling in your information to publish your property on PropertyDrive.
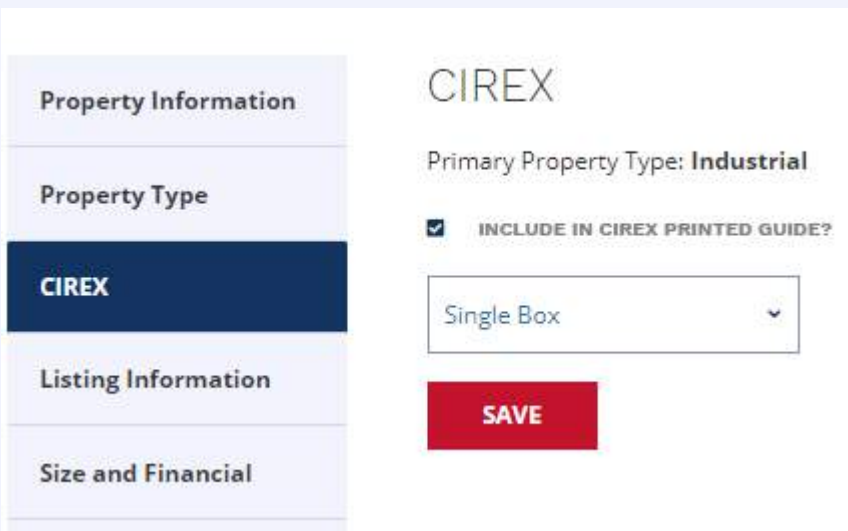
For Members

Feed Your Property to the CIREX Printed Guide

PropertyDrive has partnered with CIREX for many years to feed your PropertyDrive listings to the CIREX Printed Guide. When <u>adding your property</u> to the PropertyDrive website, you can choose to also have your property included in the CIREX Printed Guide. Simply select CIREX from the menu on the left hand side of the Add Property page and click on ☑ **INCLUDE IN CIREX PRINTED GUIDE?**

You can choose to have your add featured in a single or a double box. CIREX will bill individually for your adds. Please <u>click here</u> to see CIREX pricing.

For Members

Add Links and Attachments
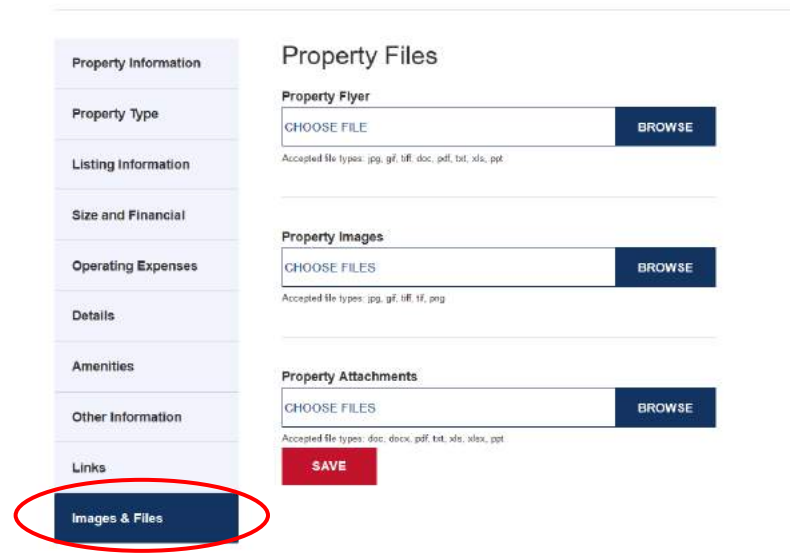
Click on **+ ADD NEW PROPERTY** under the Your Properties tab and fill out the form in the next window. You may add hyperlinks and virtual tours under the "Links" tab and photos, property brochures, and other attachments under the "Images & Files" tab.

For Members

Feature Your Property

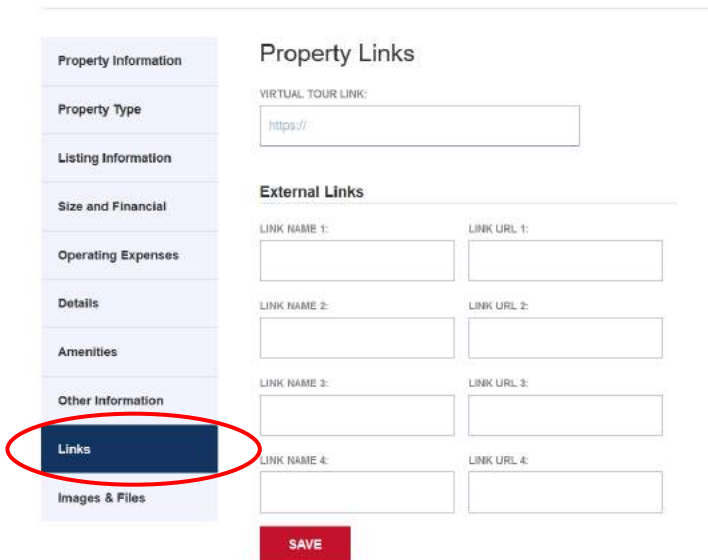Feature your property front and center directly on our Home page. To get your property featured, simply log into your account, go to Your Properties and click 🏅 **FEATURED PROPERTY**. Click on **+ NEW SUBSCRIPTION** and select the property you'd like to feature and the start date and subscription length.

Quick Tip: You can exchange the property you are featuring at any time by returning to the featured property page and clicking the 🖊 icon next to the property you would like to update. Then simply select the new property from the list on your screen and click on **UPDATE SUBSCRIPTION**.

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For Members

Tips & Tricks

- If a $ or % sign is shown next to a field, do not enter the sign. The field will be displayed in the appropriate format. However, if there is no $ or %, you must enter it to have it displayed (example: co-broke amounts have to be entered with a % if they reflect a percentage).

- The more information you fill in, the easier it will be for people to find your property when searching for specific criteria.

- For a confidential listing, select ☑ Yes, please hide location of this property   when you enter your property online. You may enter as much or as little address information as desired.

- For condos and multi-space listings: enter the smallest and largest total price possible and the smallest and largest available spaces. It is helpful to explain in the comments that price varies by size, etc. If the price is per sf, enter this amount in the comments.

- If you want to enter a specific value instead of a price range, you only need to enter it in the minimum field.

- The parcel size for Land properties may be entered as either acres or square feet. The size will be converted automatically.

For Members

View/Edit a Property

Click on **+ ADD NEW PROPERTY** under the Your Properties tab. To view your property, click the **›** symbol to get to the property page. To edit your property, please click the ✎ symbol. Don't forget to click the **SAVE** button when you are finished editing your property.

Quick Tip: Company administrators will be able to view and edit all company properties. Agents will only be able to view and edit their own properties.

For Members

Update the Status of a Property

You may change the status of your property under status by simply clicking on the current status and selecting the updated status from the drop-down menu. Changing the status field to anything other than *Active* will retire the property listing, removing it from your list of active properties.

Retired listings will still come up in searches for leased or sold properties, but they will no longer be in the search results for active properties.

For Members

Send a Broadcast Email

You may send broadcast emails to PropertyDrive members or our expanded email list. Your emails will only go to those member or non-subscribers that have chosen to receive broadcast emails (see Edit your Account).

You can choose one of our three broadcast emails, depending on whether you want to advertise your listing, are looking for a property, or wish to share company news and events related to commercial real estate.
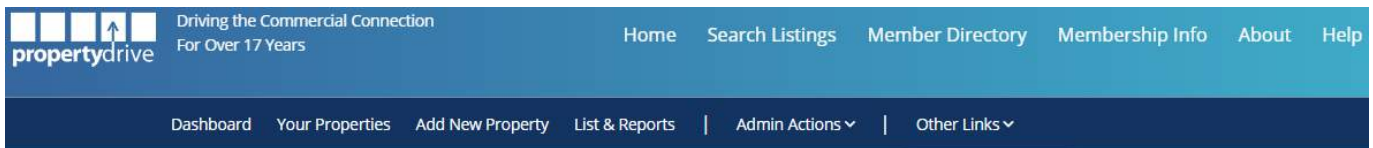
IMPORTANT: Please read the Broadcast Rules carefully before sending out your broadcast email.

For Members

You will be given the option to send your broadcast out immediately or schedule a later time for it to be sent out automatically. You will also get a chance to review your message before you send or schedule it. Once you have composed your broadcast, click on **SAVE & PUBLISH** to send or schedule your broadcast.

NOTE: Broadcasts cannot be canceled once they have been sent out or scheduled.

Quick Tip: Company Administrators can send broadcasts for their agents by selecting the name of the agent from their dropdown menu.

For Members

Search the Broadcast Archive

Our Broadcast Archive lets you search for past broadcasts that have been sent out by our members. To access the Broadcast Archive, simply click on "Other Links" on your Dashboard and select "Broadcast Archive". Fill in your criteria and click on the **SEARCH** button to find past broadcasts that meet your search parameters.

For Members

Lists & Reports

Lists & Reports allow you to create individualized search result summaries for different clients, comp studies, etc.

Create a List

There are several ways to create a list:

1. You may create a list directly from your search results. Simply select the properties you'd like to include and click on ⌄ LIST .

For Members

2. You may create a list from your Dashboard by navigating to the Lists & Reports tab, selecting Lists, and clicking on **+ CREATE NEW LIST**
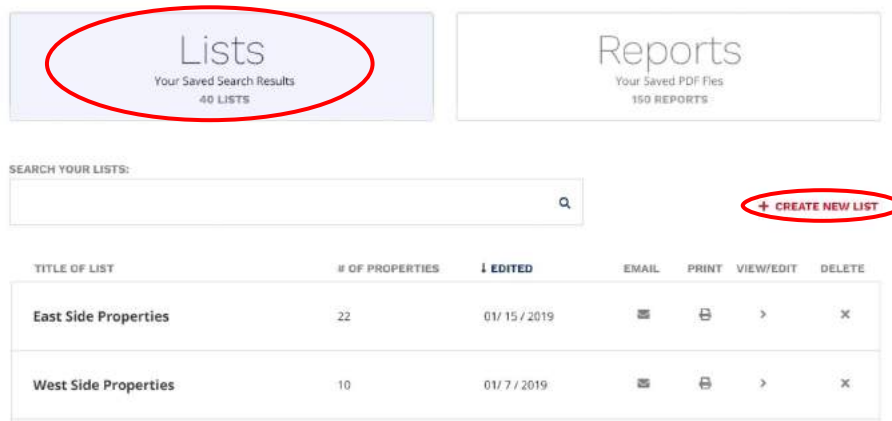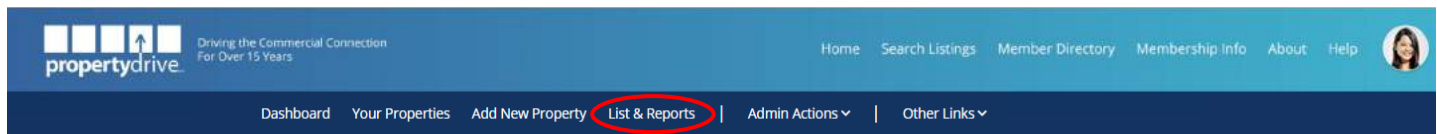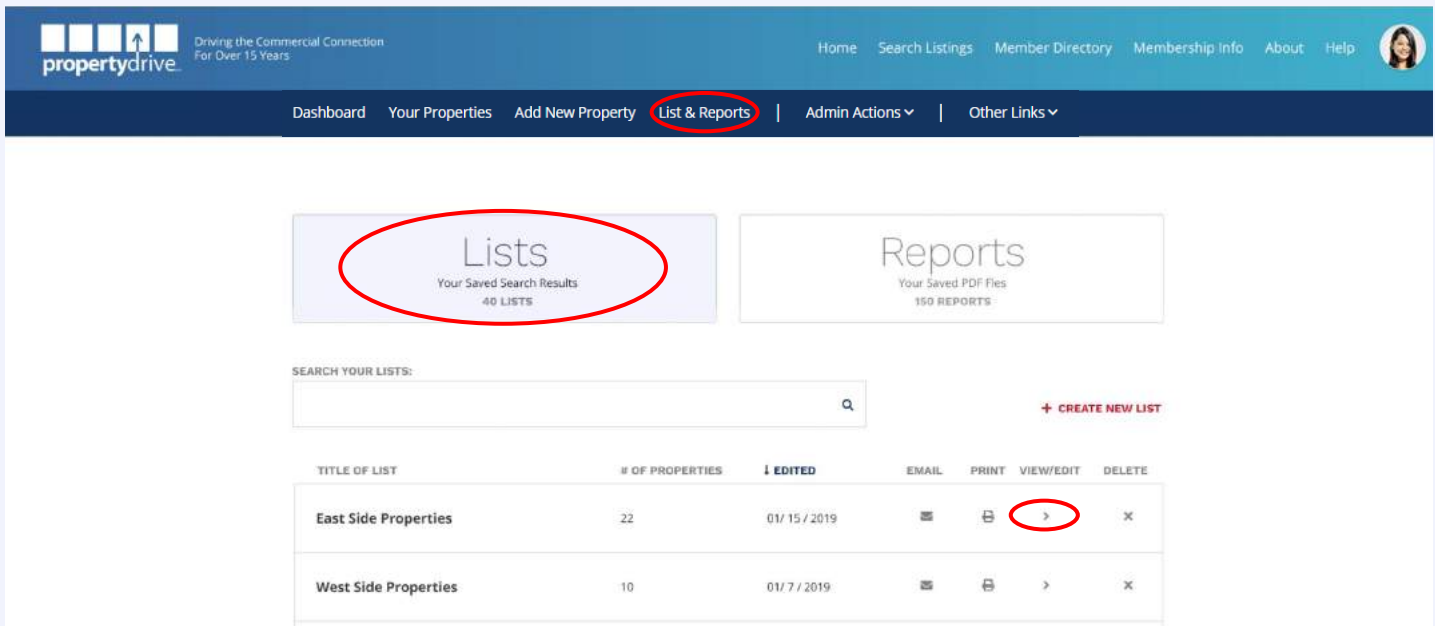
Once you've created your list, you'll be able to add properties to it by clicking the › under View/Edit.
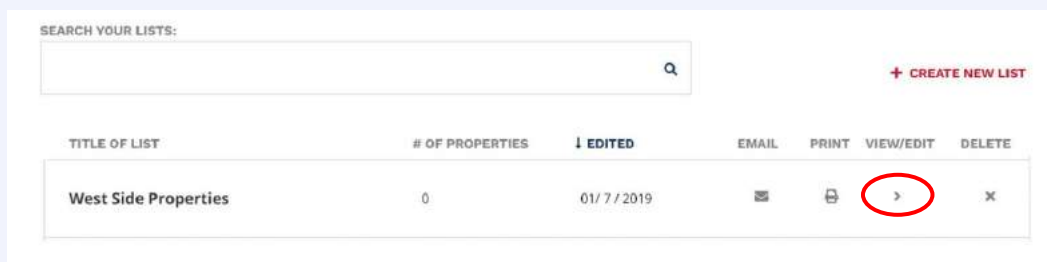
For Members

3. You may create a new list from an existing list by navigating to the Lists & Reports tab on your Dashboard, and selecting the respective list. Select the properties you'd like to add to the new list and click on ⌄ LIST   and create a new list.

For Members

Add to a List

You can add properties from your search results to an existing list by clicking the **+** symbol in the property picture. If you wish to add several properties from a search to your list, simply select the properties and click on **˅ LIST** . Select "Add to List" and select the list you with to include the properties.

View/Edit a List

You can view and edit a list by navigating to the Lists & Reports tab on your Dashboard. Find the respective list and click on **›** under View/Edit.

To remove individual properties from your list, simply click on the ⊘ symbol on the property picture.
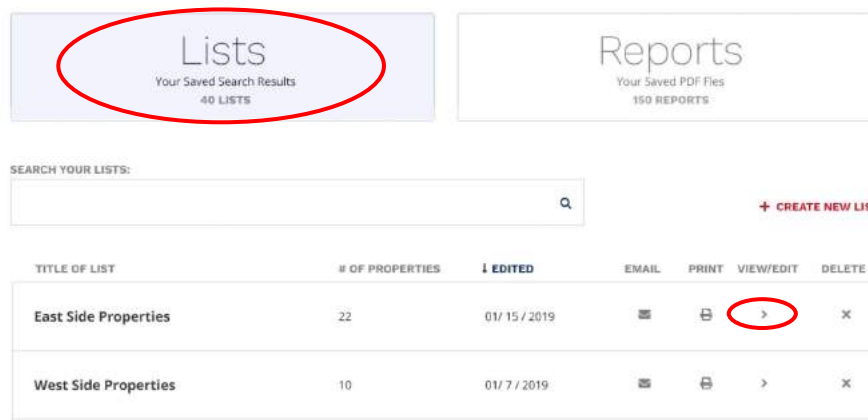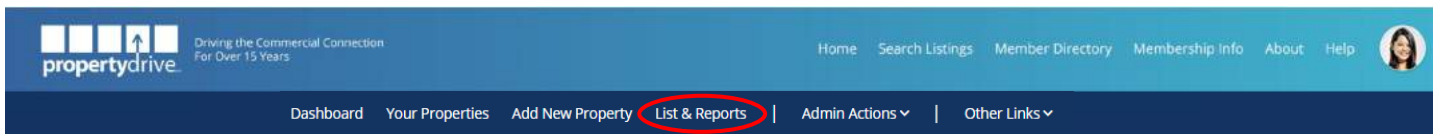
For Members

Create a Report

There are several ways to create a report:

1. You may create a report directly from your search results. Simply select the properties you'd like to include and click on ⌄ REPORT .

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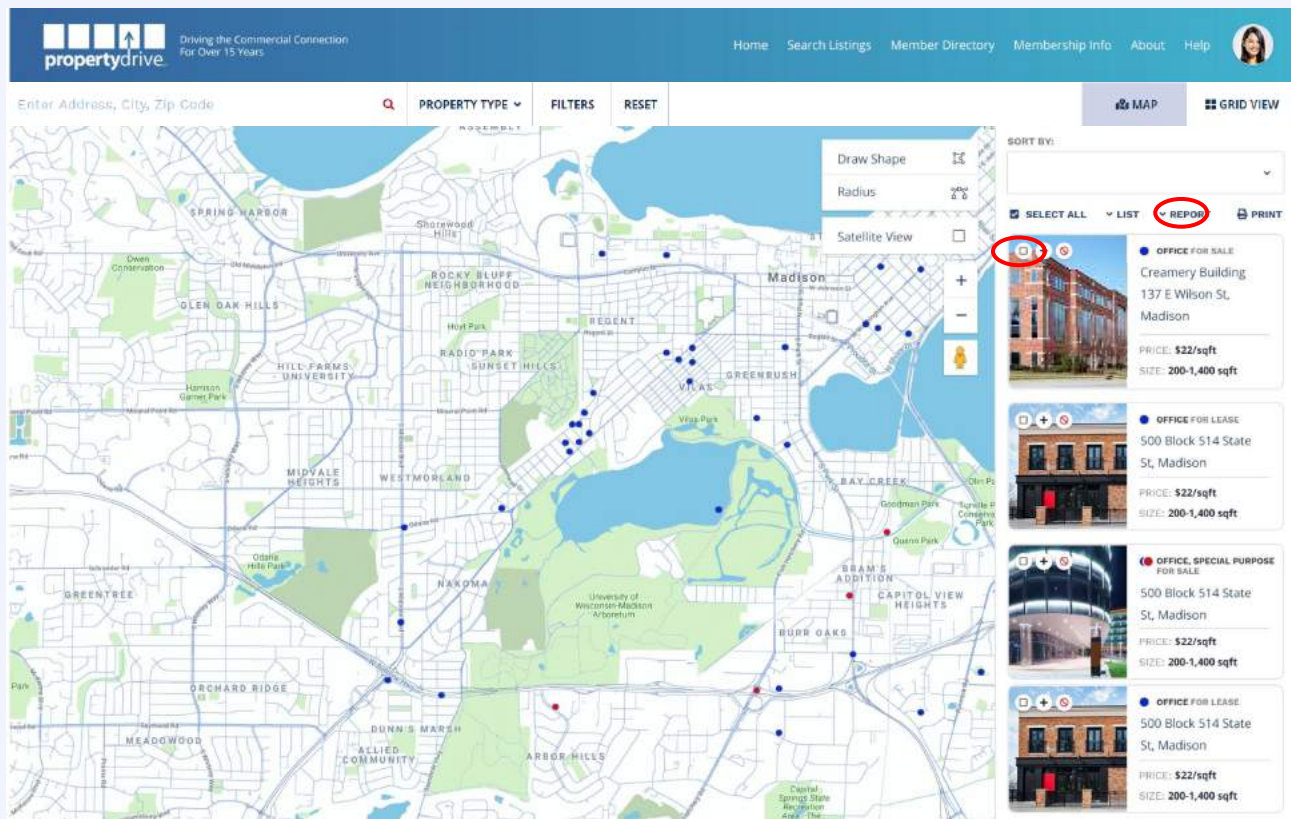
For Members

2. You may create a report from an existing list by navigating to the Lists & Reports tab on your User Dashboard, selecting Lists, and clicking on ⟩ under View/Edit. This will take you to your List, where you can click on ⌄ REPORT to create your report.
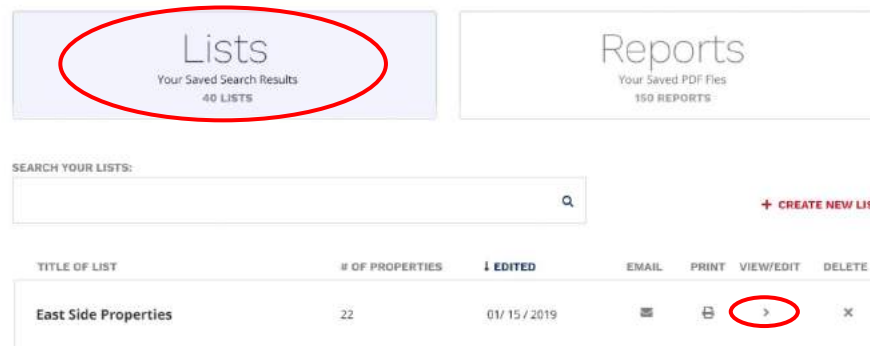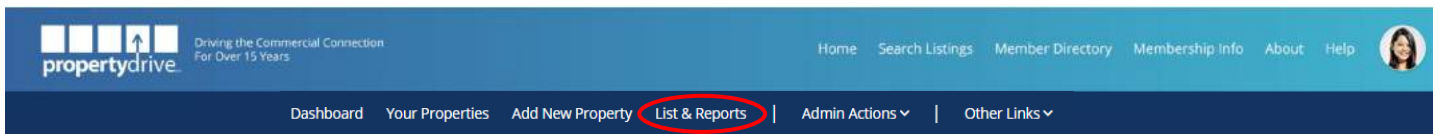
Quick Reports

You can create quick reports from lists or search results (see Create a Report). Quick reports are designed to provide you with a PDF file of your search results quickly and efficiently. You can create a quick report by selecting the properties you'd like to include from your list or search results page, clicking on ⌄ REPORT , and selecting "Quick Report" from your menu options.

You can chose to include features like a cover page, map, search results summary, and individual property details in your quick report. The report will automatically include your company name, the name of the Agent who created the report, and your company logo.

For Members

Custom Reports

Custom reports can include a cover page, map, search results summary, and individual property details. You can also include information like a title/header, description, client information, listing agent contact information, and attachments. Additionally, you have different footer options to choose from, including your company logo, your clients company logo, and contact information.

To create a custom report, select the properties you wish to include from your search results or an existing list, click on ⌄ REPORT , and select "Custom Report" (see [Create a Report](#)).

Quick Tip: Quick Reports can help you put together a list of properties on the go, or when you're in a hurry to get to your next meeting.
Custom Reports allow you to create a professional report for your team and your clients. Include your company logo and/or your client's logo to take your marketing efforts to the next level!

For Members

Difference between Lists & Reports

Below is a summary of the differences between lists, quick reports, and reports.

Features	Custom Report	Quick Report	List
Cover Page	X	X	
Map	X	X	
Summary List	X	X	
Property Detail	X	X	
Footer Options	X		
Include Attachments	X		
Arrange Property Order	X		
Email Directly from PropertyDrive	X	X	X
Create Reports Form	X		X
Save Option	X		X
Review Properties	X		X
PDF File	X	X	
View/Edit on PropertyDrive	X		X

For Members

Set up your PropertyFeed

Our PropertyFeed populates your company's listings from PropertyDrive to your company website.

→ Automatic Updates in Real Time

→ Easy to set up

→ No recurring fees!

- Choose from several different templates or have your web programmer design your own.

- It is your data, use it how you want with no monthly or ongoing charges! The only amount you will pay is a $325 one-time set-up fee.

Contact us for more information!

Thank You!

Thank you for reading this overview of PropertyDrive. We hope you found it useful and informative. If you ever have any questions, please do not hesitate to contact us. Please contact us about providing training sessions!

Thank you for choosing PropertyDrive!

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