



*AN INTRODUCTION TO*

***EA-Pro***

*BRINGING REAL ESTATE TOGETHER*

# Welcome to EA-Pro

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## 1.0 LOGGING IN

When you first launch EA-Pro the following screen will appear:



To access the system, the user should select their name from the *USER* drop down list and enter their password in the *PASSWORD* box. By default the user is *SUPERVISOR* and the password is to be left blank. Then hit the *LOGIN* button to proceed, which will bring up the following screen:



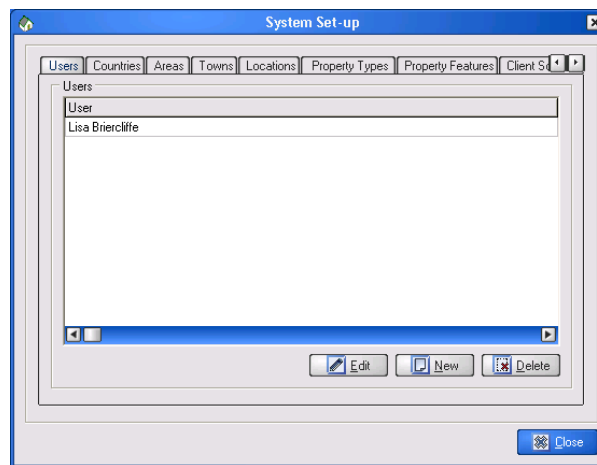
## **2.0 MENU OPTIONS**

The various system areas are listed across the top of the screen and down the left hand side. The system areas are broken down as follows:

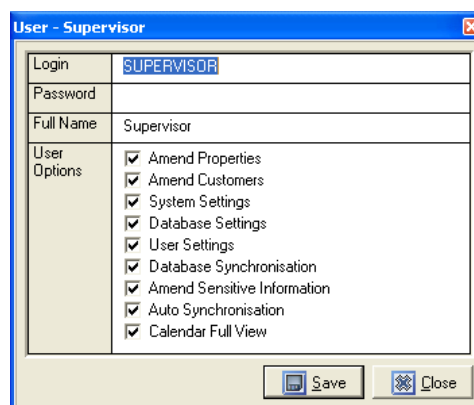
### **2.1 SYSTEM | SYSTEM SET-UP**

#### 2.1.1 Users

System set-up, either double click or use the *EDIT* button when wanting to change anything on this screen:



To add users click on the *NEW* button in the *USERS* tab and set a login name & password, you also set the user options from this screen, which will define the functions you want each individual user to be able to access or update. When you have finished updating click on the *SAVE* button and this will save the details for use whenever the user logs in, then *CLOSE*.



#### 2.1.2 Countries / Areas / Towns / Locations / Property Types / Property Features

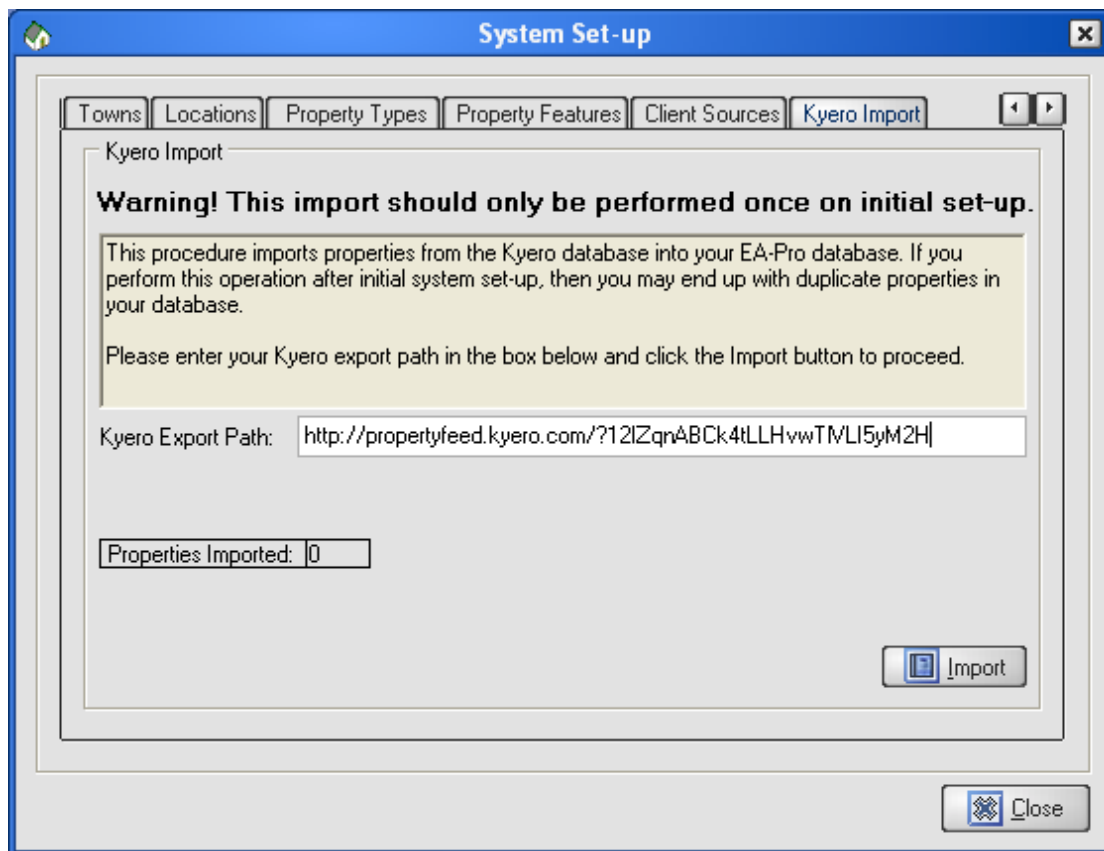
This information is held in the central EA-Pro database and cannot be updated locally by an individual. If you require an area / town / Location, etc. that isn't already listed then please email SP Soluciones at [admin@spanish-property-selection.com](mailto:admin@spanish-property-selection.com) and the system will be updated for you.

### 2.1.3 Client Sources

Sources from where you obtain clients are personal to each agency, and this section allows you to enter those details (such as “Local Paper” ”Kyero” or another Agency).

### 2.1.4 Kyero Import

When initially moving to a new software solution, it can be extremely painful to populate your new system with all of your property details. With EA-Pro, you can simply enter your Kyero export path (unique URL provided by Kyero especially for your company) and EA-Pro will automatically pull all of your property information from Kyero.



Simply click the “Import” button and EA-Pro will begin the import of your properties from the Kyero database – you will see the “Properties Imported” number increase. Once finished, you will be presented with a message stating that the import was successful.

## 2.2 SYSTEM | GENERAL SETTINGS

This is where your agent details are entered and is of paramount importance if you wish your properties to be advertised professionally. Agent name, address, email and website details entered here are shown on properties advertised on the Internet, and on printed property cards.

When properties are added to the EA-Pro system, they are automatically assigned a property number, starting at 000001. A property prefix can be specified within this screen to prefix your properties when listed. This prefix can be from 1 to 3 characters long. (See *PROP PREFIX* below). Having a property prefix can make it easier to identify which agent a particular property is with when you are looking at the property list.

WEB LOGO is shown against your properties listed on the Spanish Property Selection website.

CARD LOGO is shown on the property cards.

DEFAULT COUNTRY is initially set to Spain – this specifies the default country selected when adding a new property. The EA-Pro system is designed to work worldwide and so the default country could be set to any country listed.

OTHER COUNTRY, if specified, show's another countries currency on the property cards, i.e. United Kingdom. If you only want the property's main country currency shown, then leave this option as *NONE*.

SET CURRENCY RATES provides the ability to manually set currency rates for the default country and second country. The figures entered are in relation to the Euro, so GBP would be something like 0.65, indicating that 1 Euro is approx £0.65. If the manual option is not checked, the *AUTO SYNCH* option (see 2.4) automatically updates all country rates on a daily basis from the Central European Bank.

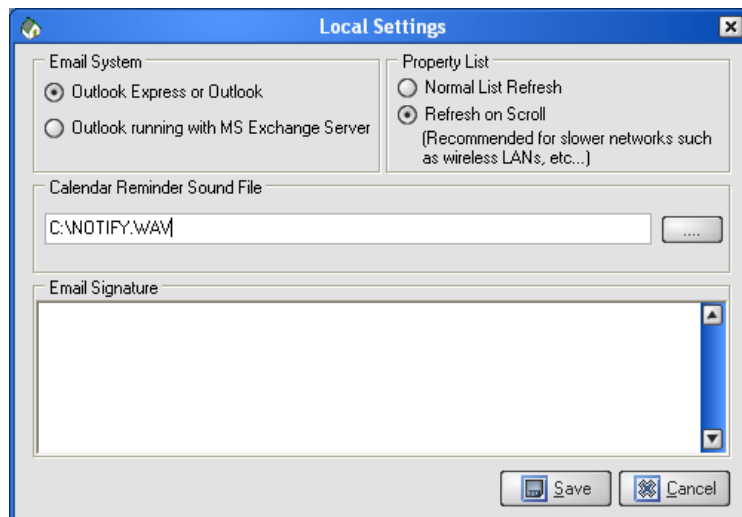
General Settings	
Agent ID	5008015
Name	Gisela Property Consultant
Address	Calle Murcia 15 Calasparra 30420 Murcia Spain
Telephone	0034 968 721157
Email	lisa@spsoluciones.com
Website	www.spsoluciones.com
Prop Prefix	BPC
Web Logo	
Card Logo	
Def. Country	Spain
Other Country	United Kingdom <small>*** Used for Prop cards</small>
<small>Please note that SP Soluciones is not responsible for the currency rates downloaded within EA Pro. Please set your own currency rates if you wish by using the "Set Currency Rates" button below.</small>	
<input type="button" value="Set Currency Rates"/> <input type="button" value="Save"/> <input type="button" value="Cancel"/>	

## 2.3 SYSTEM | LOCAL SETTINGS

Select which email system you use, either “Outlook Express / Outlook”, or if you are using Outlook running with MS Exchange Server then select this option. An email Signature is required to be entered into EA-Pro for the MS Exchange Server option, as emails are generated in a slightly different manner to the normal “Outlook Express / Outlook” method.

Property List – *NORMAL LIST REFRESH* will usually be used unless you are working with a wireless LAN in which case select *REFRESH ON SCROLL* as wireless LANs can be slow and this setting will make the property list function much faster.

The Calendar reminder sound file option allows you to browse for any wave file sound. This sound is used when calendar reminders occur. A default sound called “Alarm.wav” is set by default.

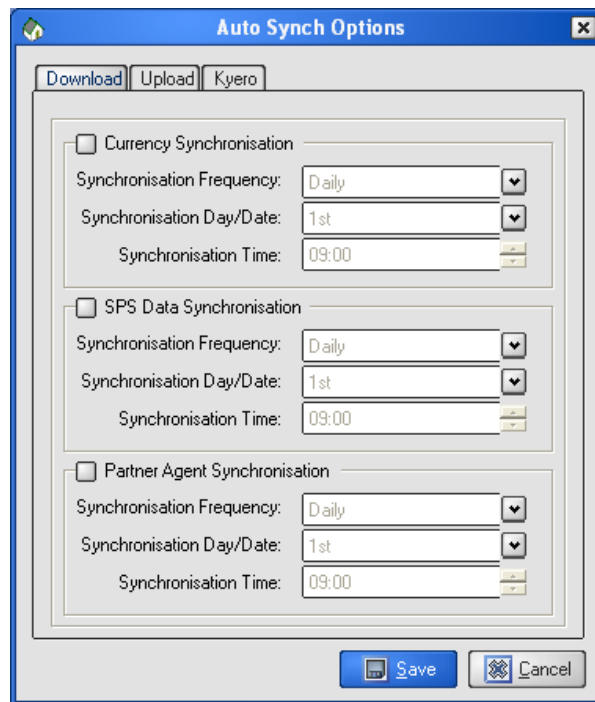


## 2.4 SYSTEM | AUTO SYNCHRONIZE

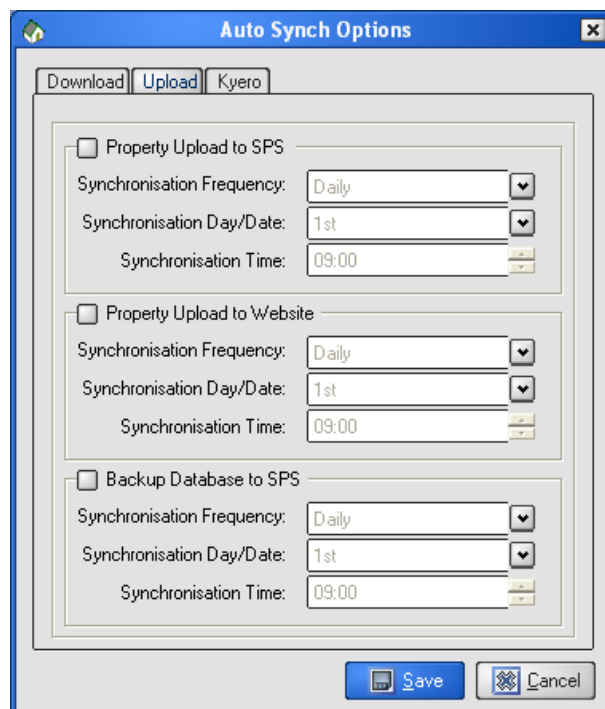
On this screen you can specify if, and how often you want the system to automatically download and update your local system with:

- A) Latest currency rate downloads
- B) SPS data downloads (latest areas, towns, etc.)
- C) Collaborative agent properties.

By putting an X in the box means you want this action to be active. Then use the drop down boxes to set the time scale.



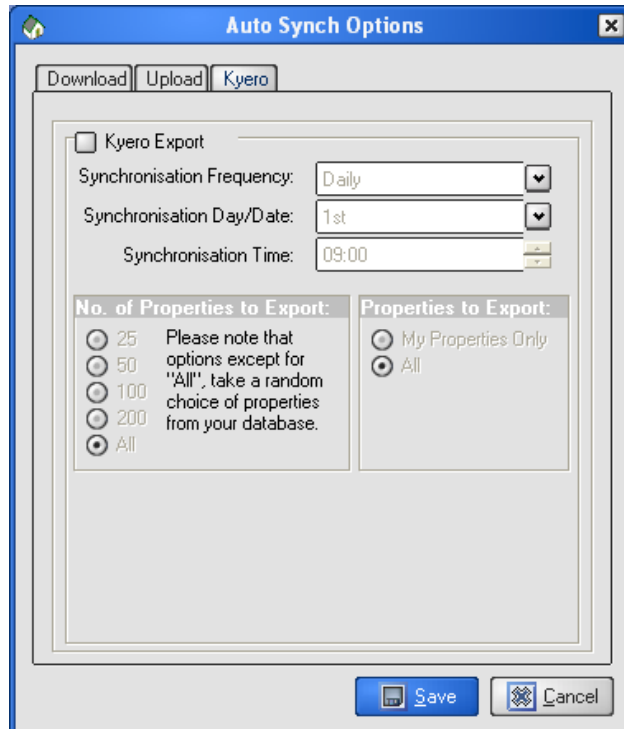
Conversely, you can specify how often you wish to upload your information:



Here, you are able to specify upload settings for:

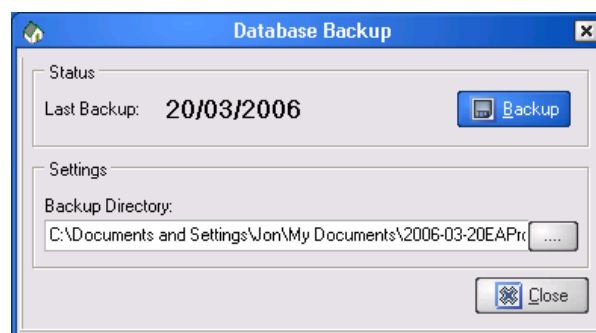
- A) Uploading your latest property information to the central database.
- B) Uploading your (and collaborative agents) latest property information to your own website.
- C) Backing up your local database to the SPS Support Area.

Keeping Kyero regularly updated with your property information is done with ease, simply check the “Kyero Export” box and enter the Kyero export options that you require. You can export a number of random properties to Kyero, all properties, and have the option to only upload your own properties to Kyero or a mixture of your own and partner agent properties.



## 2.5 SYSTEM | DATABASE BACKUP

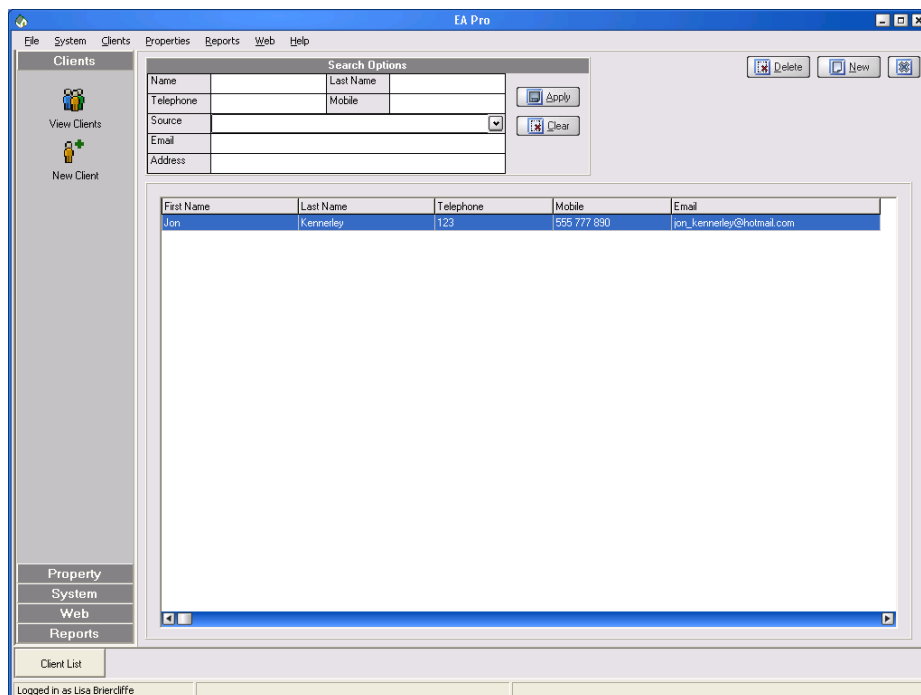
Browse your machine and choose a directory where you would like your system to be backed up to. By clicking the “Backup” button, your entire EA-Pro database will be backed up to the chosen directory.



## 2.6 CLIENTS | VIEW CLIENTS

This shows a list of clients in your EA-Pro system, and at the top of the page are client search facilities. You can search by individual client information, e.g. surname, and this will bring up a list of clients with the matching same surname - once the details are input click *APPLY* and filter the client list accordingly. You can filter on as many different client details as you like. For example, type surname of “Cr” and telephone number ‘01708’ – this will show all clients with the letters “Cr” in the surname, and “01708” in their telephone number. To reset the client list to all clients, there is a *CLEAR* button, which will reset the search criteria.

You can also add a new client from this page by clicking the *NEW* button.



## 2.7 CLIENTS | NEW CLIENT

Input general client details and their preferences in the *DETAILS* page. Tick all of the options that the client requires within the “Client Preferences” area, and this will narrow down the properties that EA Pro will suggest as suitable for that client. Adding the min / max prices and min number of bedrooms values will narrow down the search still further.

The *MATCHING PROPERTY* tab will give you a list of the properties that are suitable for the client’s preferences.

The property list order can be sorted A-Z or Z-A by double clicking on the relevant column header, *PRICE* for example.

Pictures of the properties are shown as you scroll over them, a bigger picture is shown when the mouse is over the picture. Double clicking on a property in the property list will launch a detailed screen of the property details.

### Client Wish List

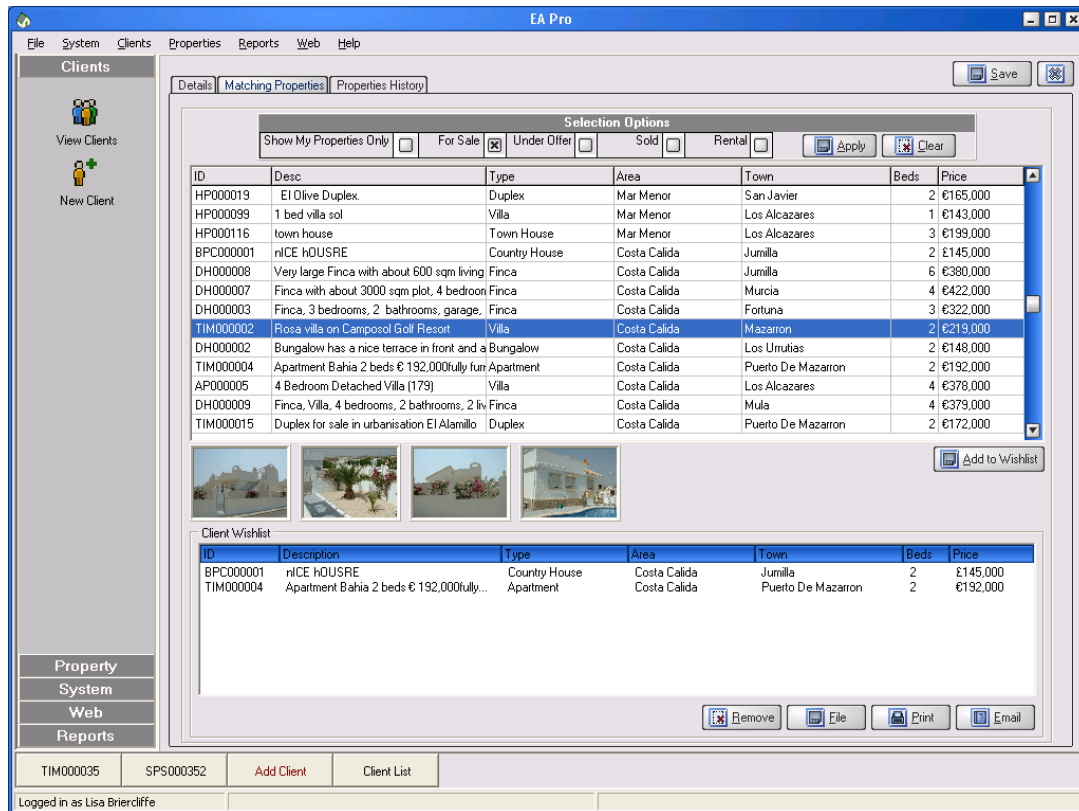
Click a property that you want a client to see in the top list, and drag to the wish list area at the bottom of the page. Alternatively, you can use the *ADD TO WISH LIST* button, this will form a list of suitable properties that can then be emailed to the client or printed off. Once you have selected all of the properties that you wish to be sent to your client, you have the options to *FILE / PRINT / EMAIL*.

**FILE** – Saves the details to disk as an Adobe pdf file.

**PRINT** – Prints off details in your office via the Adobe interface (allows printer selection, re-sizing, etc...)

**EMAIL** – Creates an Adobe pdf file and attaches it to a new email ready to be sent to your client – the clients email address is already filled in for you if you have an email address for the client within EA-Pro.

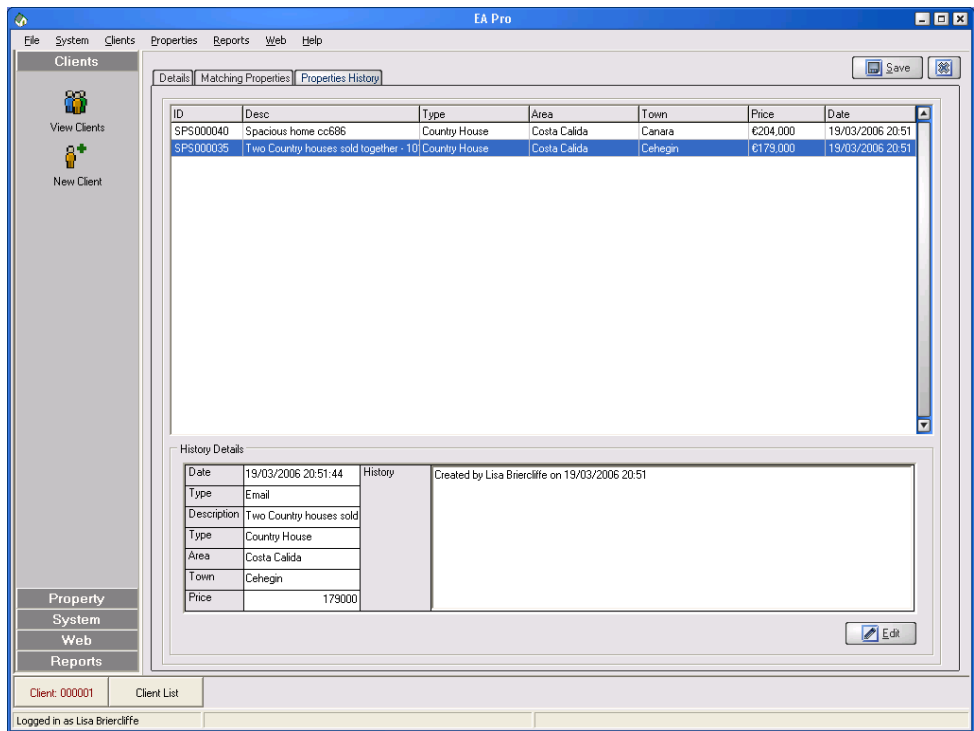
There are several property card types available for sending/printing property details, these are listed in a drop down selection box. The list consists of detailed templates (where each page displays a whole property's details) and list templates (where multiple property details are listed on a single page).



## Properties History

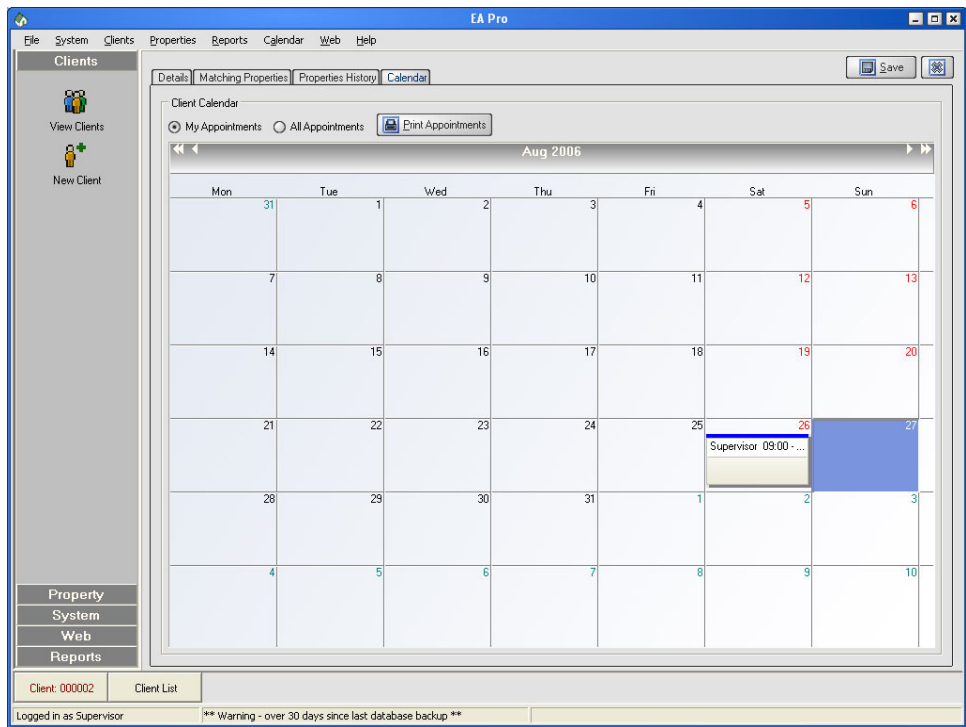
The property history for a client provides a list of properties previously given to a client. The list can be re-ordered by clicking the top columns of the list in the same manner as re-ordering the property list.

Details of the current selected history item can be viewed at the bottom of the screen. Notes can be entered against an item by clicking the "Edit" button - this provides the ability to track a client's feedback against properties.



## Client Calendar

The client calendar shows all appointments for that client. The client calendar defaults to a month view for the current month. A more detailed view of a day's appointments can be seen by double clicking on the square an individual day.



For detailed use of the calendar functionality, see 2.11.

## 2.8 PROPERTY | VIEW PROPERTIES

### Search Options

You can search EA-Pro properties by price, Town, Area, Min beds and Type, etc. Click the *APPLY* button to filter the property list accordingly. The *CLEAR* button clears previous filter options and shows all agent properties. Additionally, only properties that are For Sale, Under Offer, Sold or Rental can be shown in the list. Click on the top bar of a column in the property list to order by A-Z or Z-A.

### Partner Options

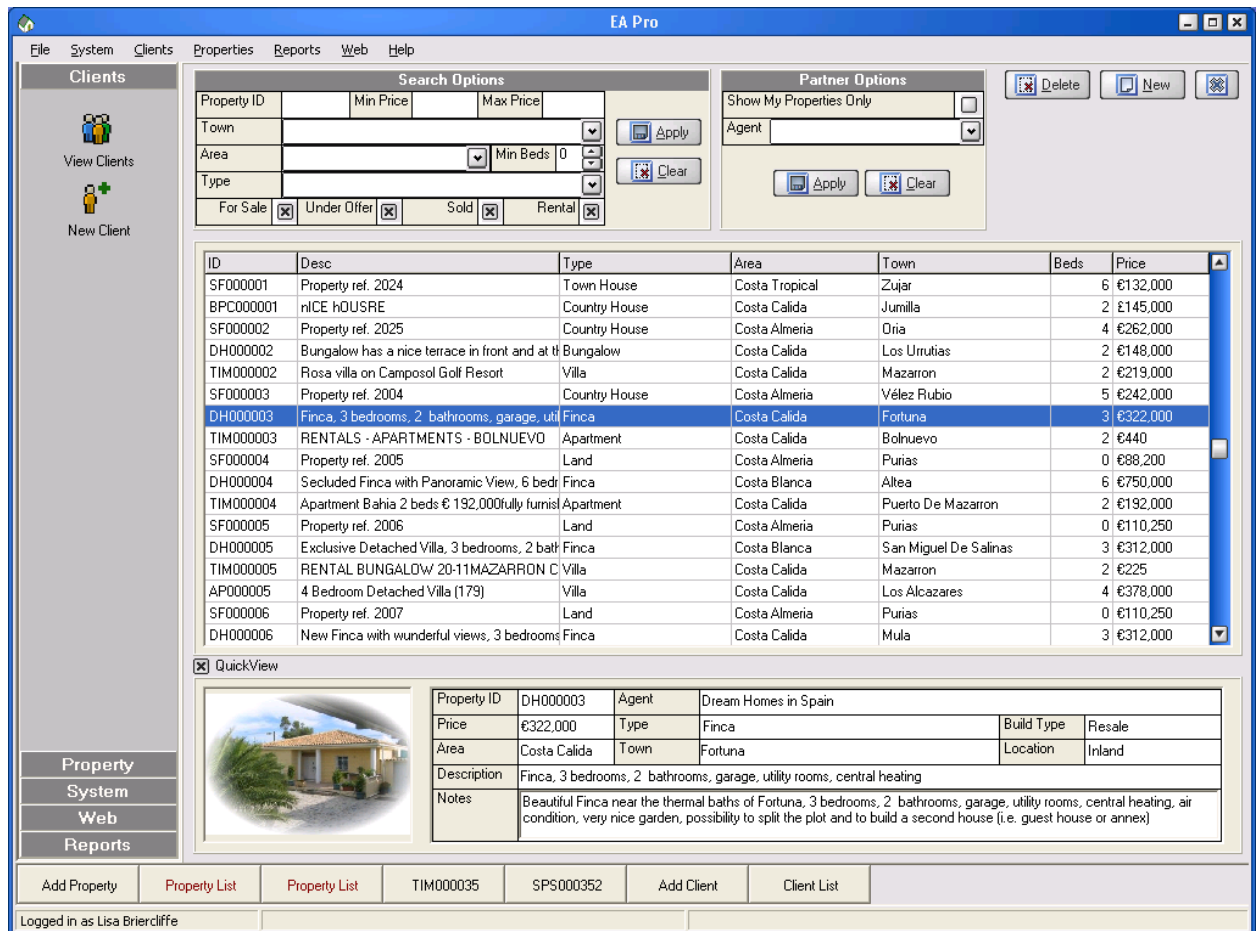
If you are partnered with other collaborative agents through the EA-Pro system then a further filter section called “Partner Options” is shown.

This allows you to display only your own properties in the property list, or list properties for any other collaborative agent. The *CLEAR* button clears previous filter options and shows all agent properties.

It should be noted that Search Options and Partner Options work independently of each other, for example – clearing the filter in the Partner Options will not clear the Search Options criteria currently selected.

You can also create *NEW* properties from this screen and *DELETE* any property in the list. Deleting a property does not archive it, it is a permanent deletion from the system. Therefore care should be taken before deleting a property. It is advisable to keep a property on the system until the sale is completely finalised – changing the status of the property (i.e. To Under Offer or Sold) can allow you to remove these properties from your property list should you so wish (see the search options section above).

Collaborative agent properties can be deleted from your local system too, should there be another agents’ property that you do not wish to be included in your local system. If another agent’s property is deleted, it is again a permanent deletion and the property will not re-appear in your property list when you next synchronise your system with the central EA-Pro database.



## 2.9 PROPERTIES | NEW PROPERTY

### Details

This is where general property details are entered, most of which is self-explanatory, but anything that needs expanding upon has a quick definition below:

**NO BEDS** allows you to specify either a definite number of bedrooms or a range, from say 2-6 beds. This is useful when selling properties on a new development. For a definite number, check **NO. BEDS** and for a range, check **BEDS FROM**.

**CURRENCY** - This defaults to the currency of the country where the property is based, but can be changed to any currency that you require. This feature would be used if, for example, you are selling Spanish property but are based in the UK, and therefore want the primary price of the property to be in Sterling. Note that the currency printed on the property card and shown on the website will be the currency set for that individual property.

**UPLOAD** – Specifies whether the property will be shown on:

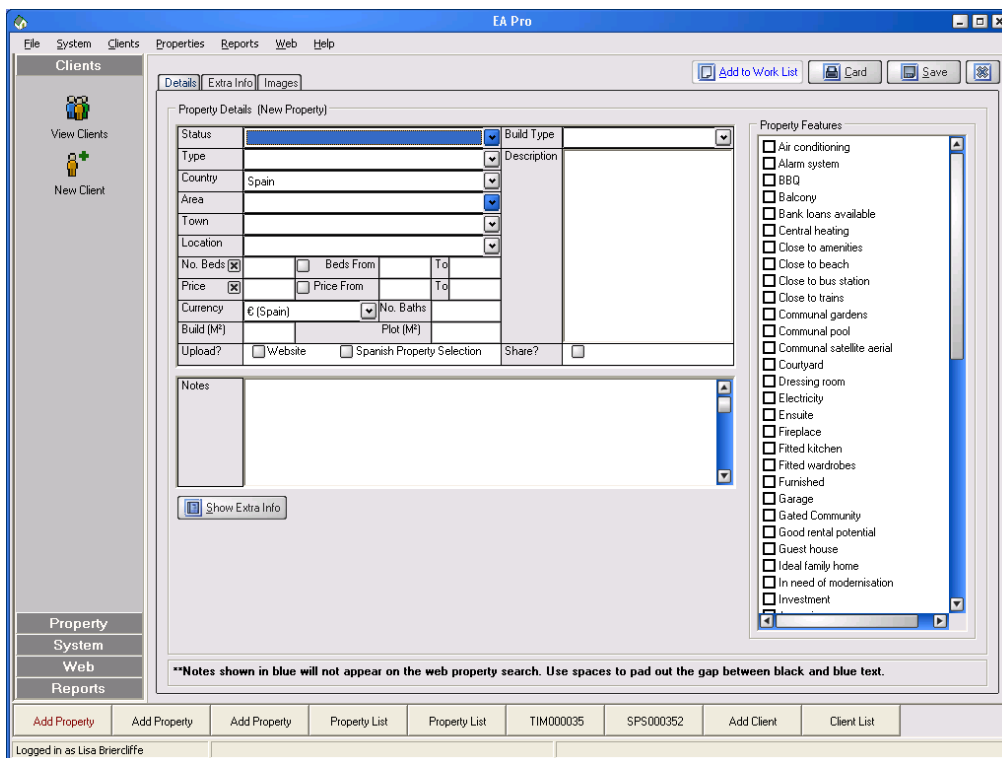
- Your website (if configured within EA-Pro)
- Spanish Property Selection portal
- Kyero (included in exports to Kyero)

SHARE relates to your properties uploaded to Spanish Property Selection. If you want to SHARE the property details with other agents (i.e. They can download your properties to their local EA-Pro system) then this option should be checked. If not checked, your properties will still be uploaded to the portal (if the upload option is checked).

NOTES – Input any details relevant to the property description that aren't covered by the property features list.

SHOW EXTRA INFO – This area is secured, based on your user rights. Here you can store sensitive details about the property – vendor, commission rate, etc... These details are shown/hidden with the button in case the property details are being shown to a client in your office.

For you own properties, this section has specific areas for entering commission rates, owner details, etc, but for other agent properties there is just a general notes area for you to make your own notes on the property. This is because such sensitive information such as owner details and commission rates are kept solely to your local EA-Pro system.





Click on the *BROWSE* button to locate a property image on your hard drive. Pictures are loaded directly into the EA-Pro system, so it does not matter if the source image file on the hard drive is deleted at a latter point. Images can be rotated using the circular button in the top right of each image, and a description can be added just below the picture. Additionally, the brightness and contrast of each image can be adjusted using the *EDIT* button.

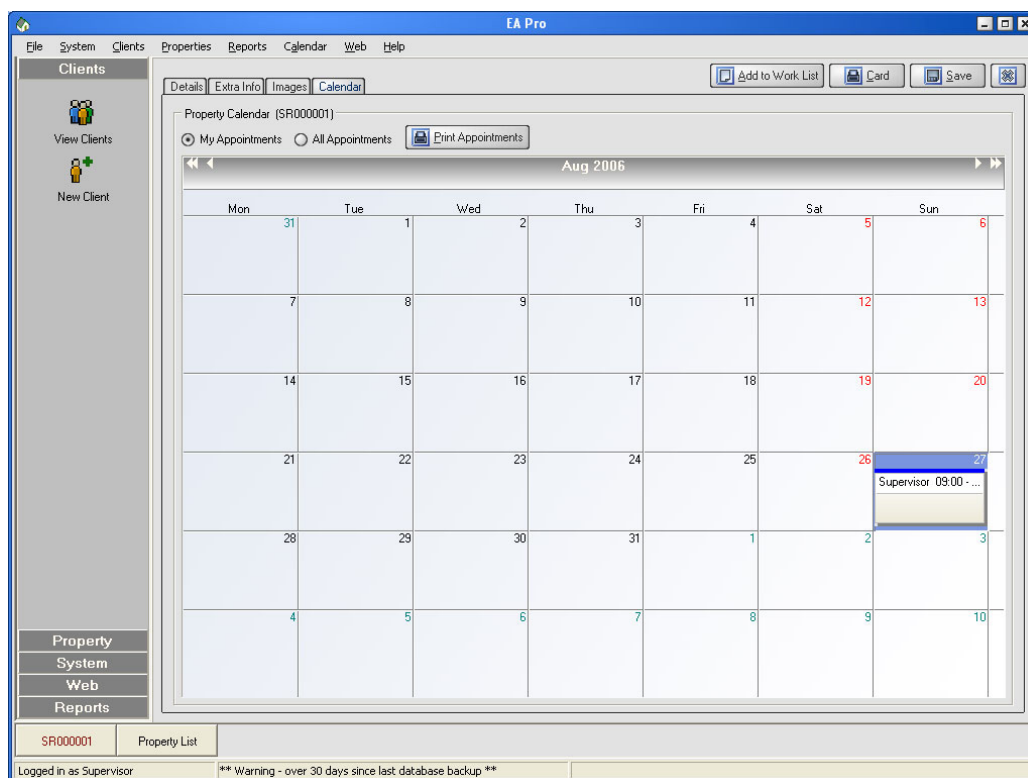
An Image can be swapped with another image by dragging and dropping the image into another image box, thus allowing you to change the order in which they are viewed. This is important as the main photo plus 2<sup>nd</sup>, 3<sup>rd</sup> are the main images used in the production of the majority of property cards and also on the website property search facilities.

When all the pictures are as you want them click on the *SAVE* button. The property “Details” tab will be shown and EA-Pro will perform a spell check on the property details entered before committing the property to the system.

Please note that the facility to spell check relies on Microsoft word being installed on your machine.

## Property Calendar

The property calendar shows all appointments for that property. The property calendar defaults to a month view for the current month. A more detailed view of a day’s appointments can be seen by double clicking on the square an individual day.



For detailed use of the calendar functionality, see 2.11.

## 2.10 REPORTS

### Client reports

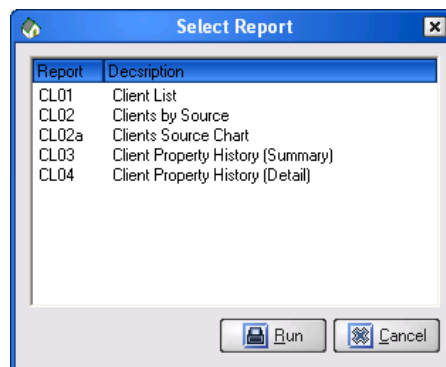
The “Select Report” dialogue has a list of the reports available to you. Select the report that you require and press the *RUN* button to initiate the report. EA-Pro will then collate all the information required in an instant, enabling you to have up to the minute information at your fingertips.

The *CLIENT LIST* is a list of all clients held on your system.

The *CLIENTS BY SOURCE* lists clients, grouped by source. (Sources are entered in the System Setup section – see 2.1.3)

The *CLIENTS SOURCE CHART* is a pie chart showing the breakdown of clients by source.

The *CLIENT PROPERTY HISTORY SUMMARY / DETAIL* reports provide detailed histories of property details given to a client.



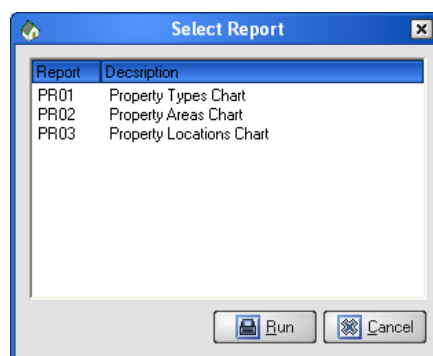
### Property Reports

The “Select Report” dialogue has a list of the reports available to you. Select the report that you require and press the *RUN* button to initiate the report. EA-Pro will then collate all the information required in an instant, enabling you to have up to the minute information at your fingertips.

The *PROPERTY TYPES CHART* shows a pie chart breakdown of properties by type.

The *PROPERTY AREAS CHART* shows a pie chart breakdown of properties by area.

The *PROPERTY LOCATIONS CHART* shows a pie chart of properties by location.



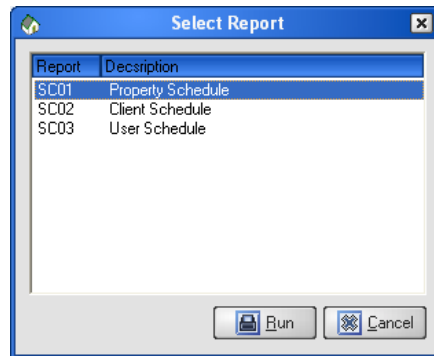
## Schedule Reports

The “Select Report” dialogue has a list of the reports available to you. Select the report that you require and press the *RUN* button to initiate the report. EA-Pro will then collate all the information required in an instant, enabling you to have up to the minute information at your fingertips.

The *PROPERTY SCHEDULE* shows appointments for a property for a period.

The *CLIENT SCHEDULE* shows appointments for a client for a period.

The *USER SCHEDULE* shows appointments for a user for a period.

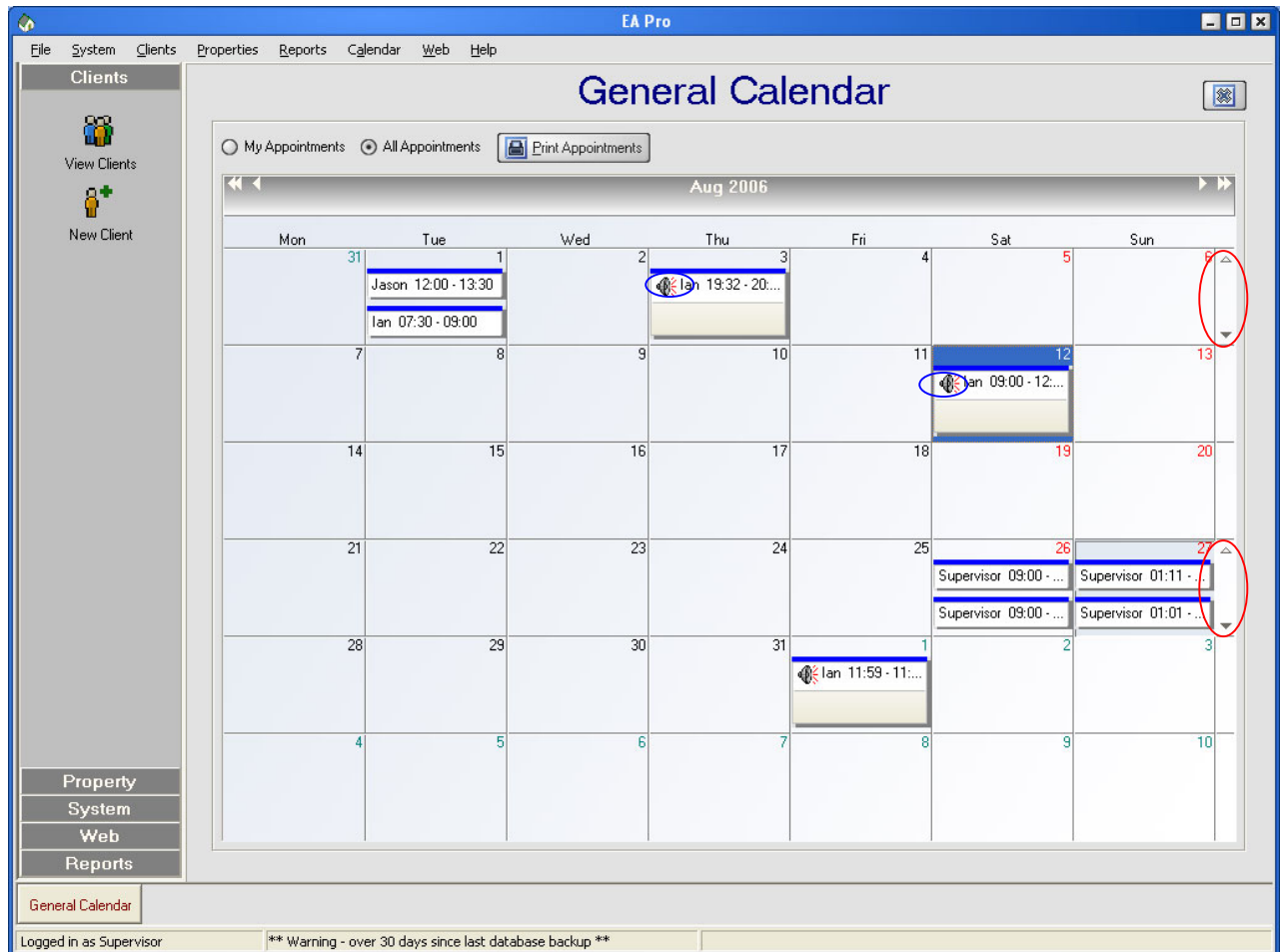


## 2.11 GENERAL CALENDAR

The calendar functionality within EA-Pro allows appointments to be set to allow you to organize your activities. Alarms can be set against appointments so that you are reminded of your appointments in good time.

:

### Month View



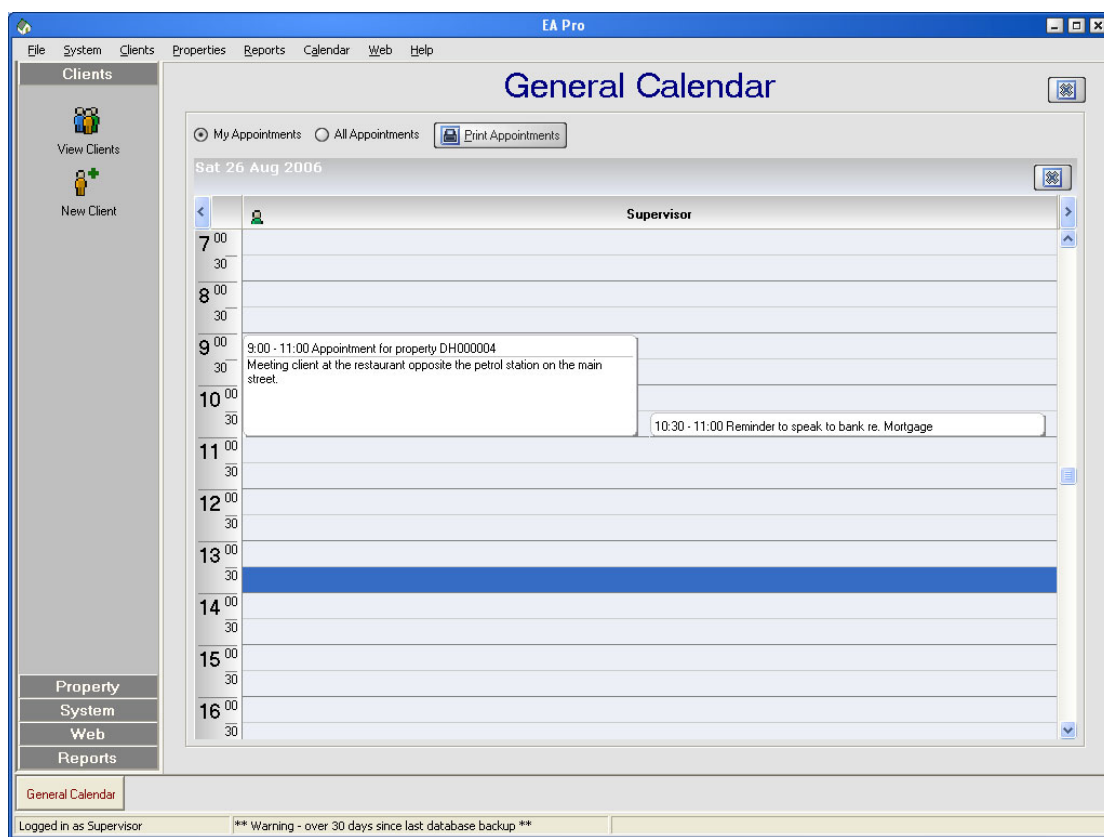
The calendar defaults to a month view, as shown above. Within the month view, a summary view of the month's activity is shown. When multiple appointments are set for the same day, a maximum of 2 appointments can be visible at one time within this view, but scroll bars on the right hand side allow for movement across all of the appointments for that day (circled in red on above image). A speaker icon (circled in blue on above image) shows that a reminder is set for that appointment.

Each appointment on the calendar in the month view will show the user that the appointment is for, and the time range (if space permits). It should be noted that the My Appointments / All Appointments selection at the top of the screen will toggle between showing all user appointments and your own appointments. The All Appointments option is only available to those users with the "Full Calendar View" security option (See 2.1.1).

When an individual appointment is selected within the calendar, the text for that item appears in red, indicating that it is selected. From then, you have 2 options with a right mouse click - edit the appointment or delete it. Additionally, when the top section of the appointment is selected with the mouse, the crossed cursor shows, indicating that the appointment can be dragged across to another day should you wish to change the appointment times. Right clicking on the calendar where there is no appointment will give you a “New” option for creating a new appointment.

When a day square is double clicked (outside of the edges or any appointment), the day view for that day is shown, providing greater detail of that day’s appointments.

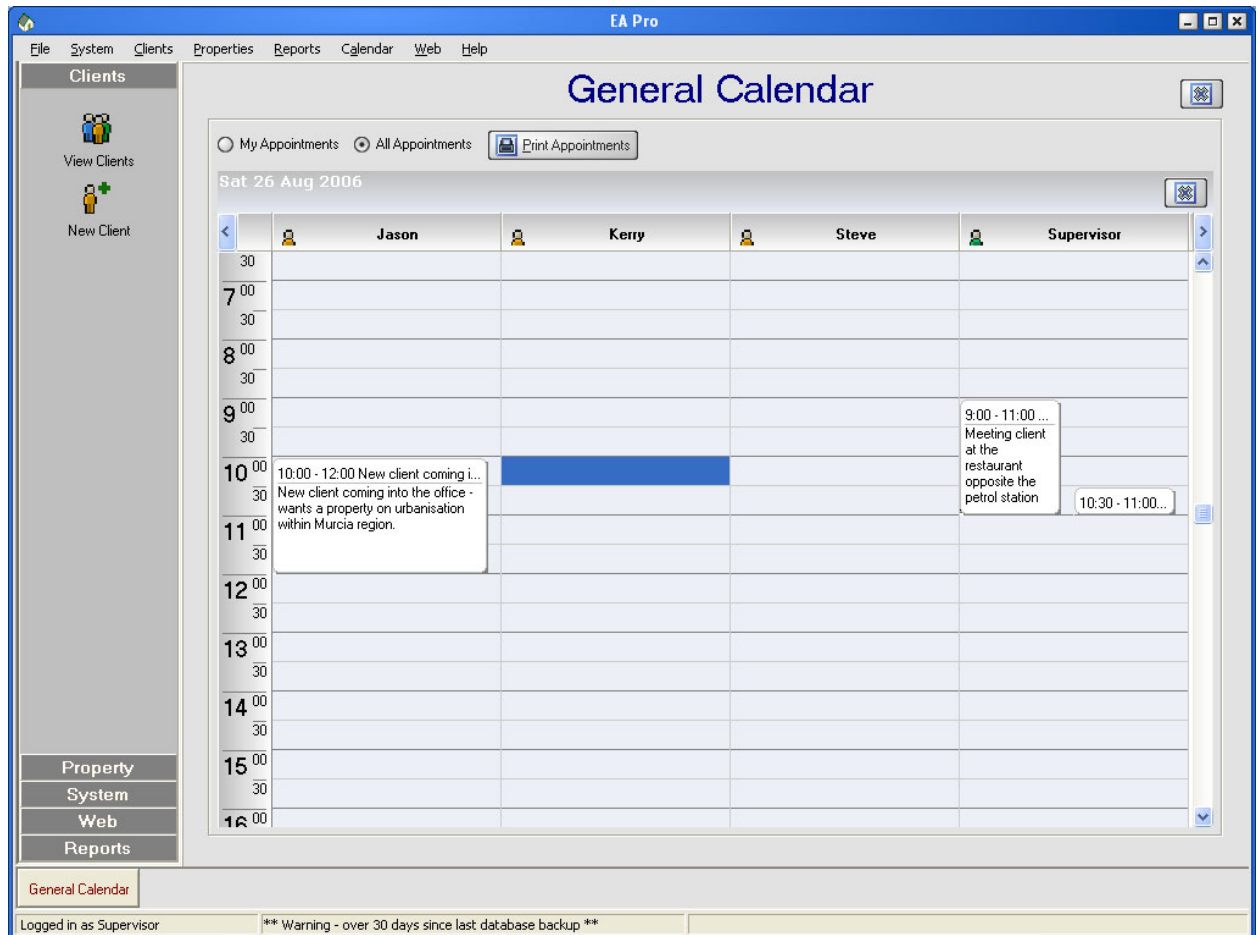
## Day View



The day view allows for greater visibility of a day’s appointments. Each appointment stretches down the page for the appointment duration, giving a clear view of your activities for the day. Appointments can overlap, and there is no limit as to how many will overlap. Within this view, the appointment heading can clearly be seen – along with full appointment times. Additionally, a section of the appointment notes can be seen, and can be edited directly by clicking on the main body of the appointment.

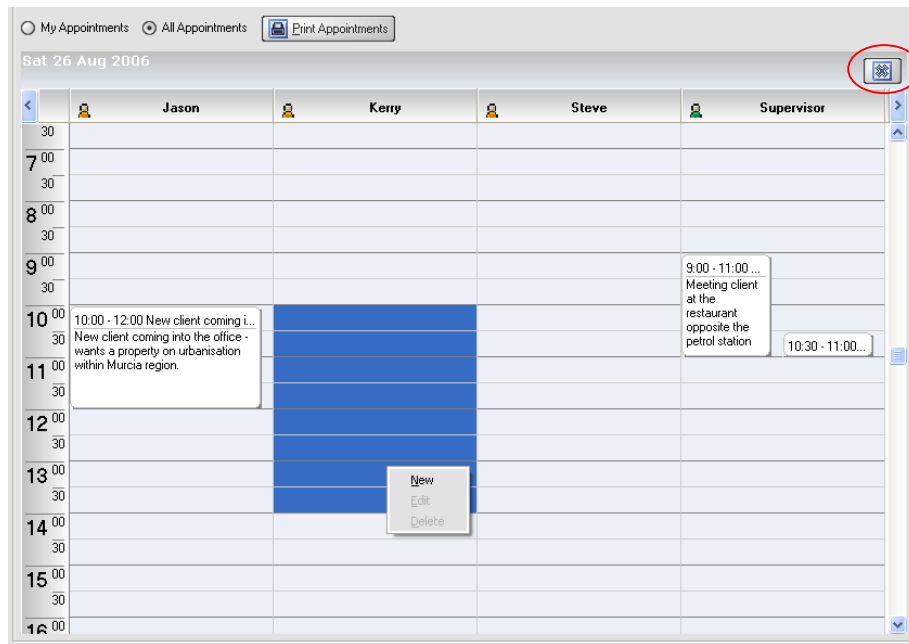
Appointments can be moved in the same manner as with the month view calendar (select the header section of the appointment and the crossed cursor will appear). Additionally, by moving the mouse over the top or bottom of an appointment, a vertical arrowed cursor will appear, allowing you to “stretch” the duration of the appointment.

If you have the security to view all user appointments, then appointments can be dragged from one user to another, which is a very useful feature. The day view, showing all user appointments, shows a column for each user – up to a maximum of 4 users visible at one time. If there are more than 4 EA-Pro users on your system, scroll buttons are available to move across to the users appointments that you require. The day view screen, with all users, looks as follows:



Within the multiple user view, your column is indicated by a green icon, whereas other user icons are amber coloured.

An additional feature of the day view calendar is that, when adding a new appointment, you can selected the time segments required before right clicking and pressing the “New” option. This sets the times for the appointment in the appointment edit screen, thus speeding up the appointment entry:



When in day view, a close button appears on the top right of the calendar (highlighted in red). This closes the current day view and returns to the previous month view calendar.

## Printing Appointments

Whether in the month view or day view, you can print appointments for the calendar period shown by pressing the “Print Appointments” button. If the month view is current, appointments for the date range shown will be printed, if the day view is current, only appointments for that day will be printed.

If “My Appointments” is selected in the calendar then only your own appointments for the period will be printed, otherwise all users appointments will be printed. Again, your access to whether all user appointments can be viewed / printed relates back to the “Full Calendar View” security option in section 2.1.1.

## Appointment Editing

Whether creating a new appointment, or editing an appointment from either the month view or day view calendar, the screen for entering appointment details is as follows:

The screenshot shows the 'Edit Appointment' window with a warning message: 'Warning: this appointment occurs in the past'. The window is divided into three main sections: Appointment Details, Property Details, and Client Details.

**Appointment Details:**

- User: Supervisor
- Subject: Appointment for property DH000004
- All Day:
- Date: 26/08/2006
- From: 09:00:00
- To: 11:00:00
- Notes: Meeting client at the restaurant opposite the petrol station on the main street.
- Message:  Reminder 30 Minutes  Silent?

**Property Details:**

	Property ID	SF000033	Agent	Spanish Residence Authenica SL		
	Price	€191,000	Type	Country House	Build Type	Resale
	Area	Costa Calida	Town	Calasparra	Location	Inland
	Description	Newly Reformed Country House - 1006				
	Notes	Newly reformed country house located on the outskirts of Calasparra. This 2 bedroom property has a nice plot of 500m2 offering plenty of space for a pool - overlooking the stunning scenery .				



**Client Details:**

Title	Doctor	Name	frederick	Fax	
Last Name	Roosevelt-Smythe			Email	
Address				Source	
				Status	
Telephone				Notes	
Mobile Telephone					


Save

If the appointment date or start time is in the past, a warning appears at the top of the form. Other areas of this screen function as follows:

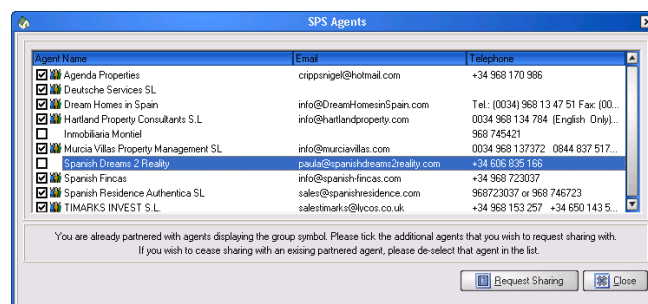
- USER** Select the user that the appointment is for. This defaults to your own user and you can only select a different system user if you have the “Full Calendar View” security rights.
- SUBJECT** Enter the subject of the appointment. This is seen in the header of appointment items in the calendars.
- ALL DAY** Select this option and the start / end times change to all day time settings.
- DATE** Select the appointment date and start/end times.

- NOTES** Any further details about the appointment that the subject does not indicate. This information is seen in the body section of appointment items in the calendars.
- REMINDER** Check this option to enable an alarm to be set for this appointment. A reminder time is available for selection ranging from 0 minutes to 1 month.
- SILENT?** This sets the reminder as silent – ie. the reminder tone will not be played when this alert occurs.
- PROPERTY DETAILS** A Property related to this appointment can be selected by clicking on the  button. Some appointments may have a related property, some may not – so this is optional.
- CLIENT DETAILS** A Client related to this appointment can be selected by clicking on the  button. Some appointments may have a related client, some may not – so this is optional.

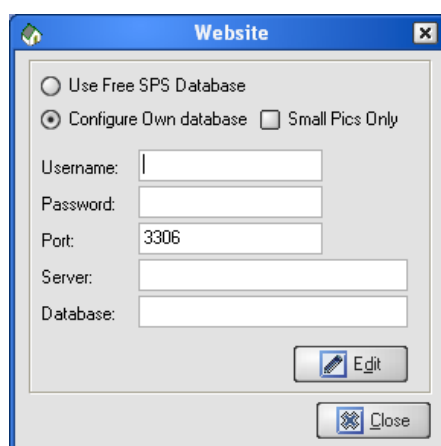
## 2.12 WEB | SYSTEM AGENTS

This lists all EA-Pro agents along with their email addresses and contact telephone numbers. If you are partnered with any of the agents in the list then a  symbol is shown next to that agent and the agent is ticked in the list.

If you wish to share with new agents then simply tick them in the list. If you wish to remove sharing with a current agent, un-tick that agent in the list. Clicking the **REQUEST SHARING** button will create a formatted email ready to send through to the SP Soluciones admin team.



## 2.13 WEB | WEBSITE




This screen allows you to configure the upload of your properties directly from EA-Pro to your personal website. Your website needs to have MySQL installed in order for this feature to work. Simply enter your MySQL login details on this screen and EA-Pro will do the rest!

In order to make this fantastic feature more accessible to our agents, you have the option to use the “Free SPS Database” option. This enables full database upload and search facilities from your own website without the need for your own MySQL database. For more information, please email [sales@spsoluciones.com](mailto:sales@spsoluciones.com)

The “Small Pics Only” checkbox lets you decide whether you only want to upload small (400x300) images to your website, or full size images “1200x900”.

## 3.0 AUTOSYNC SERVICE

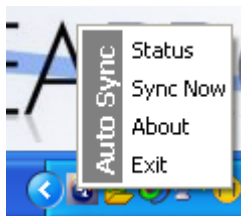
You will notice that, after EA-Pro has been installed, there will be a new icon in your computer’s system tray:  This is the Autosync service, and is responsible for keeping your system up to date with all of your autosync options set from within EA-Pro. These processes are:

- Currency Synchronisation – downloads latest currency rates from the Central European bank.
- SPS Data Synchronisation – downloads the latest information from our central server for countries, areas, towns, property types, etc..
- Partner Agent Synch - downloads latest property information from partners that you share with within the EA-Pro system.

- Property Upload to SPS - Uploads your latest property information to our central server. This ensures that all of your partners that you share with will have your latest property information.
- Property Upload to Website- Uploads your latest property information to your Website – this can either be to your own mySQL server on your own website, or you may choose to use our free SPS webspace to provide property searching on your website.
- Backup DB to SPS - Uploads a backup copy of your local database to a secure area on our server. EA-Pro provides local backup facilities, but this provides extra peace of mind to have back-ups outside of your office building.
- Kyero Export - Exports properties to Kyero, saving you the time of manually updating Kyero with your property information.

### 3.1 The Autosync Interface

From the system tray, you can right click on the Autosync icon and you will be presented with a pop-up menu, as follows:



#### 3.1.1 Exit

Closes down the Autosync application. By default, Autosync will auto-launch every time that Windows is restarted.

#### 3.1.2 About

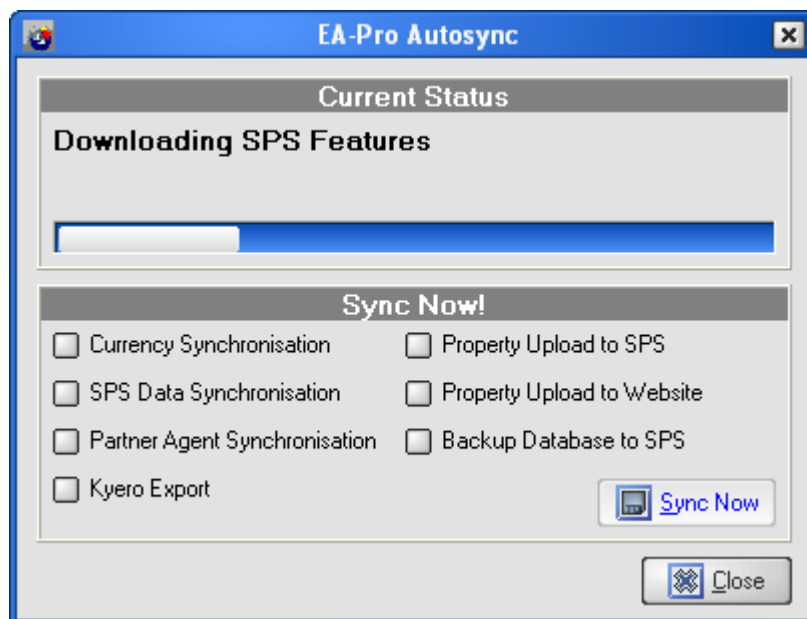
About box, showing the current version of Autosync running, plus the SP Soluciones support email address.

#### 3.1.3 Sync Now

Starts synchronisation of all processes immediately, regardless of what schedules are set within the Auto Sync section of EA-Pro.

### 3.1.4 Status

Status brings up the following form, showing current AutoSync state:



The Sync Now button here works in the same manner as Sync Now described in 3.1.3, except that you have the choice of processes to Synchronise by selecting the relevant boxes before clicking the “Sync Now” button.

The “Close” button will just close down the status form, Autosync will continue to run.

## **4.0 EA-PRO PROPERTY SHARING**

### **4.1 DATA TRANSMISSION**

We understand that protecting your data is of the utmost importance and so the only information ever uploaded to the EA-Pro central database is your general property information – images, price details, description, etc... Sensitive information such as owner details, property address, commissions, etc. are kept solely within your local EA-Pro database.

In order to secure your local database, however, EA-Pro provides the ability to back up your entire database to our support area, where it is secure and no other agents can get access to it. This means that you are safe in the knowledge that, should some local disaster occur in your office and you have no local backup copies, you can contact us and we can re-instate your system to it's former state.

### **4.2 SHARING ENVIRONMENT**

A huge benefit of the EA-Pro system is the ability to share your properties with collaborative agents. However, there are a number of set-up options that you as an agent can choose, and sharing may not be one of them.

The agent configuration options available are:

Show / Don't Show properties on the SPS Portal.

Share / Don't Share properties with collaborative agents.

Don't upload some/all of your properties to the central database.

Don't upload some/all of your properties to your website.

Disable sharing of individual properties within the central EA-Pro database.

All of these mix/match options make EA-Pro a very beneficial and effective system for anyone to use!