

ASKA ESTATES

User Manual

Leads, stock, sales, maps, marketing and documents in one place, from any device, wherever you work.

WHAT'S INSIDE

01 Getting started

03 Adding and working your leads

05 Duplicate clients and shortlists

07 Stock and listings

09 Testimonials and reserved plots

11 Show days and seller reports

13 Leads that come in by themselves

15 For managers and the administrator

17 Quick answers

02 How a lead moves through the system

04 Appointments and email

06 Past clients and the card library

08 Sales

10 Maps

12 The phone app

14 Documents

16 For Cindy: shortlists

Aska Estates – User Manual

Oct 2, 2026 · @Corlia

Getting started

Aska Estates is the office system for your leads, past clients, stock, sales, reserved plots, maps, marketing and documents. It keeps every lead and past client: who they are, what they want, where they came from and every contact you make. Only you (and the office manager) can see your leads. It works from anywhere: the office, home, a show day or on the road, on any internet connection or mobile data.

Signing in

1. You receive a **Welcome to Aska Estates** email from the office with the link, your username, a temporary password and this manual.
2. Open the link in your browser (Chrome, Edge or Safari), on your computer or phone.
3. Enter your username and the temporary password, and click **Sign in**.
4. The first time, you're asked to **choose your own password** (at least 8 characters). Type it twice and click **Save and continue**.
5. You stay signed in on that device for 30 days.

Lost the email or forgot your password? Ask the office manager to click **Send login details**: you'll get a new email with a fresh temporary password.



Username

Password

Sign in

First time: set up My details

Click **My details** (top right):

- Check your **email** and **mobile**. They appear in the signature of every email you send from the system.
- You can change your password here at any time.
- The **Help** button next to My details opens this manual.

The screenshot shows the Aska Property Group user interface. On the left, the 'My details' sidebar is open, displaying fields for 'EMAIL SIGNATURE' (My email: warren@aska.co.za, My mobile: 082 410 2210) and 'CHANGE PASSWORD' (Current password, New password (8+ characters)). A 'Save my details' button is at the bottom of the sidebar. The main content area shows the 'Card library' section with an 'Upload a card' form. The form includes a 'Card name' field (e.g., 'Balloons and confetti'), a 'Use for' dropdown (set to 'Birthdays'), and an 'Upload card' button. Below the form, there are filters for 'All' (2), 'Birthday' (1), 'Home anniversary' (1), and 'Any occasion' (0), along with a 'Show archived' checkbox. Two sample cards are displayed: 'Happy Home-iversary' and 'Happy Birthday!'. The top navigation bar includes 'My leads' (1), 'Duplicates' (1), and 'Past clients' buttons.

The screen

Part of the screen	What it is
My leads tab	Your leads. A blue number = new leads from reception you haven't opened yet.
Duplicates tab	Clients you have who are also in another agent's list. A red number = new ones.
Past clients tab	Clients you've sold to or rented to, with birthday and home anniversary reminders.
Bell	Birthdays and home anniversaries due in the next 7 days.
My details / Sign out	Your signature details and password; signing out.

On your phone

Everything works on a phone. Add it to your home screen so it opens like an app: in Safari tap **Share > Add to Home Screen**; in Chrome tap **⋮ > Add to Home screen**.



My leads

Duplicates 1

Past clients



Signed in as
Warren

My details

Sign out

Today: Johan Kruger: 3rd home anniversary ·
Priya Naidoo's birthday

View reminders

Search name, phone, email, area, ad...

All sources



☐ Show archived

Export CSV

+ New lead

Tomorrow 10:00 · Viewing

Thabo Mokoena

7 Protea Street, Pinehurst

Mon, 05 Oct 17:30 · Viewing

Annelie van der Merwe

Unit 12 Oakhurst, Bellville

5 All active

1 New

0 Contacted

2 Viewing booked

1 Offer / application

1 Won

0 Lost

0 Follow-up due

Thabo Mokoena

Duplicate

082 314 7720

Viewing booked

03 Oct 2026

Annelie van der Merwe

083 902 1145

Viewing booked

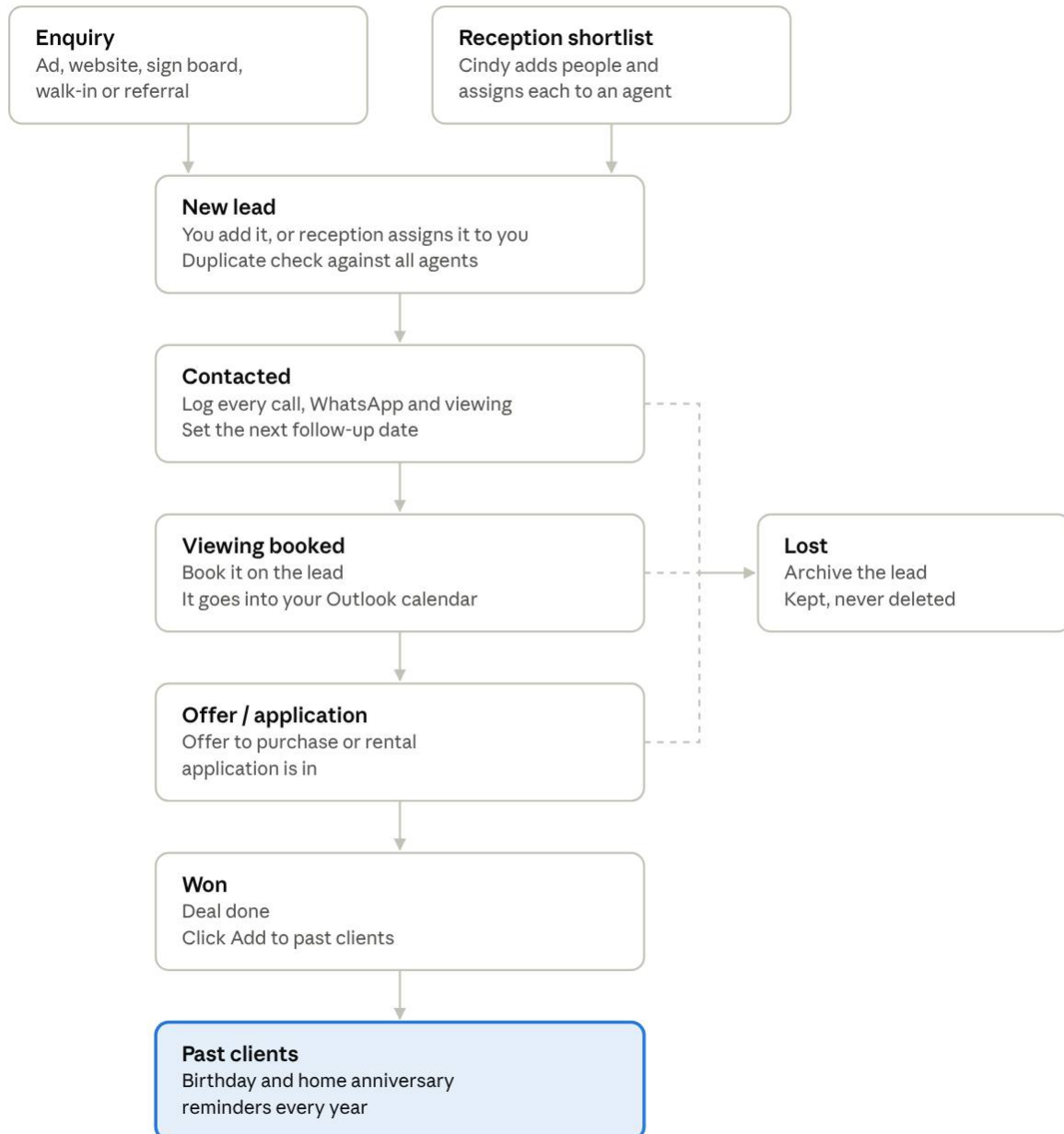
Three golden rules

1. **Every lead goes into the system**, the same day, with where it came from.
2. **Log every contact** (call, WhatsApp, viewing) and set the next follow-up date.
3. **Nothing can be deleted.** If a lead is no longer active, archive it. Every change is recorded with your name and the time.

How a lead moves through the system

Every lead follows the same path, and its status shows where it is.

Every lead follows one path, from enquiry to past client



a lead's journey · 6 stages, 2 ways in

A lead can be marked Lost at any stage from Contacted onwards; archive it then, and it stays on record.

Adding a new lead

Click + **New lead** on **My leads**, fill in what you know and click **Save lead**. Only the name and one way to contact them (mobile, other phone or email) are required.

The screenshot displays the Aska Property Group user interface. On the left, a sidebar shows navigation options: 'My leads' (1), 'Duplicates' (1), and 'Past clients'. Below this, a 'Today' summary for Johan Kruger mentions a 3rd home anniversary and Priya Naidoo's birthday. A search bar is available. The main area shows a list of clients with their details and property preferences. On the right, a 'New lead' form is open, allowing users to add a new client with fields for full name, mobile, other phone, email, and preferences. The form also includes sections for 'Looking for' (wants to, property type, areas, budget, bedrooms) and 'Other requirements'.

CLIENT

Full name *
e.g. Thandi Mokoena

Mobile
082 123 4567

Other phone

Email
name@example.com

Prefers
No preference

Phone numbers and email are checked against every other agent's list when you save.

LOOKING FOR

Wants to
Buy

Property type
Not sure yet

Areas / suburbs
e.g. Durbanville, Bellville

Budget from (R)
Budget to (R)

Bedrooms (min)

Other requirements
Garden, pet friendly, near schools, bond pre-approved...

CLIENT

LOOKING FOR

Thabo Mokoena Duplicate
082 314 7720
Buy · House · 3 bed · Durbanville, Pinehurst
R 2,500,000 – R 3,200,000

Annelie van der Merwe
083 902 1145
Rent · Apartment / flat · 2 bed · Bellville
up to R 12,000

Yusuf Adams
071 448 3390
Sell · Townhouse · Kenridge

Sipho Dlamini Just assigned Shortlist
073 220 4411
2-bed flat near the station

Megan Botha
084 120 5567
Buy · Townhouse · 2 bed · Brackenfell
up to R 1,850,000

Section	Fields	Tips
Client	Full name, Mobile, Other phone, Email, Prefers (call, WhatsApp, email, SMS)	Type numbers any way: 082..., +27 82... and 27 82... are all understood.
Looking for	Wants to (buy, rent, sell, let out), Property type, Areas / suburbs, Budget from and to (R), Bedrooms (min), Other requirements	Put must-haves in Other requirements: pets, garden, schools, bond pre-approval.
How they reached us	Source, Which ad / listing / campaign	Always fill these in. Source = Property24, Private Property, Facebook ad, Instagram ad, Google ad, Aska website, Show day, Sign board, Referral, Walk-in, Repeat client, Shortlist or Other. Add the ad's reference, e.g. P24 ref 118420.
Pipeline	Status, Next follow-up	New leads start as New . Set the date you'll next contact them.

When you save, the system checks the phone numbers and email against every other agent's leads. If the client is already with another agent, you'll see a message and both of you get a duplicate alert (see *Duplicate clients*). If it's already one of **your** leads, it tells you

that too, so you don't add the same person twice.

Working your leads

My leads lists your active leads, the ones needing follow-up first. Overdue follow-up dates show in **red**, today's in **orange**.

CLIENT	LOOKING FOR	CAME FROM	STATUS	FOLLOW-UP
Thabo Mokoena Duplicate 082 314 7720	Buy · House · 3 bed · Durbanville, Pinehurst R 2,500,000 – R 3,200,000	Property24 P24 ref 118420 – 3-bed Pinehurst	Viewing booked	03 Oct 2026
Annelie van der Merwe 083 902 1145	Rent · Apartment / flat · 2 bed · Bellville up to R 12,000	Facebook ad Sept rentals campaign	Viewing booked	05 Oct 2026
Yusuf Adams 071 448 3390	Sell · Townhouse · Kenridge	Sign board Board at 14 Vineyard Lane	Offer / application	08 Oct 2026
Sipho Dlamini Just assigned Shortlist 073 220 4411	2-bed flat near the station	Shortlist Rentals waiting list – Bellville	New	—
Megan Botha 084 120 5567	Buy · Townhouse · 2 bed · Brackenfell up to R 1,850,000	Aska website	Won	—

Finding leads

- **Upcoming appointments** show as cards at the top. Click one to open the lead.
- The **status buttons** (New, Contacted, Viewing booked, Offer / application, Won, Lost, Follow-up due) show how many leads are at each stage. Click one to show only those; click again to show all.
- **Search** finds a name, phone number, email, area or ad reference.
- **All sources** shows only leads from one source, e.g. Property24.
- **Show archived** includes archived leads.
- Tags on a lead: **Duplicate** (also with another agent), **Shortlist** (came from reception), **Just assigned** (new from reception, not opened yet).

Opening a lead

Click a lead to open its file on the right. It shows the status and next follow-up, contact details with **Copy** buttons, appointments, what they're looking for, how they reached us, every contact step and the full change history.

The screenshot displays the Aska Property Group software interface. On the left, a sidebar shows navigation options: 'My leads' (1), 'Duplicates' (1), and 'Past clients'. Below this is a search bar and a calendar view for 'Tomorrow 10:00 - Viewing' and 'Mon, 05 Oct 17:30 - Viewing'. A status bar indicates 5 All active, 1 New, 0 Contacted, 2 Viewing booked, 1 Offer / application, and 1 Won. The main client list shows five clients: Thabo Mokoena (Duplicate), Annelie van der Merwe, Yusuf Adams, Sipho Dlamini (Just assigned), and Megan Botha. The right panel provides a detailed view of Thabo Mokoena, including a duplicate client warning, status (Viewing booked), contact details (Mobile, Email, WhatsApp), appointments (Tomorrow 10:00 Viewing), and search criteria (Wants to Buy, Property type House, Areas Durbanville, Pinehurst). Buttons for 'Email client', 'Book appointment', 'Change', 'Cancel', 'Archive', and 'Edit lead' are visible.

Today: Johan Kruger: 3rd home anniversary · Priya Naidoo's birthday

Search name, phone, email, area, ad...

Tomorrow 10:00 · Viewing
Thabo Mokoena
7 Protea Street, Pinehurst

Mon, 05 Oct 17:30 · Viewing
Annelie van der Merwe
Unit 12 Oakhurst, Bellville

5 All active | 1 New | 0 Contacted | 2 Viewing booked | 1 Offer / application | 1 Won

CLIENT	LOOKING FOR
Thabo Mokoena Duplicate 082 314 7720	Buy · House · 3 bed · Durbanville, Pinehurst R 2,500,000 – R 3,200,000
Annelie van der Merwe 083 902 1145	Rent · Apartment / flat · 2 bed · Bellville up to R 12,000
Yusuf Adams 071 448 3390	Sell · Townhouse · Kenridge
Sipho Dlamini Just assigned Shortlist 073 220 4411	2-bed flat near the station
Megan Botha 084 120 5567	Buy · Townhouse · 2 bed · Brackenfell up to R 1,850,000

Thabo Mokoena Close

Duplicate client. Also in another agent's list:
• Nathan – added 02 Oct 2026 via Private Property · matched on phone

STATUS
Viewing booked | Next follow-up: 03 Oct 2026

CONTACT DETAILS Email client
Mobile: 082 314 7720 [Copy](#)
Email: thabo.m@example.com [Copy](#)
Prefers: WhatsApp

APPOINTMENTS Book appointment
Tomorrow 10:00 Viewing
60 min | 7 Protea Street, Pinehurst
Agent to collect keys from office
✓ In Outlook calendar · client invited Change Cancel

LOOKING FOR
Wants to: Buy
Property type: House
Areas: Durbanville, Pinehurst

Archive Edit lead

Logging a contact step (do this every time)

1. In **Contact steps**, choose **How** (Call, WhatsApp, Email, SMS, Viewing, Meeting, Voicemail, No answer).
2. Set the **Next follow-up** date.
3. Write **What happened**, e.g. *Spoke to Thabo, wants to view 3-bed houses in Pinehurst on Saturday.*
4. Click **Log contact step**.

A **New** lead moves to **Contacted** automatically when you log the first step.


My leads 1
Duplicates 1
Past clients

Today: Johan Kruger: 3rd home anniversary · Priya Naidoo's birthday

Search name, phone, email, area, ad...

Tomorrow 10:00 · Viewing
Thabo Mokoena
7 Protea Street, Pinehurst

Mon, 05 Oct 17:30 · Viewing
Annelie van der Merwe
Unit 12 Oakhurst, Bellville

5 All active
1 New
0 Contacted
2 Viewing booked
1 Offer / application
1 Won

CLIENT	LOOKING FOR
Thabo Mokoena Duplicate 082 314 7720	Buy · House · 3 bed · Durbanville, Pinehurst R 2,500,000 – R 3,200,000
Annelie van der Merwe 083 902 1145	Rent · Apartment / flat · 2 bed · Bellville up to R 12,000
Yusuf Adams 071 448 3390	Sell · Townhouse · Kenridge
Sipho Dlamini Just assigned Shortlist 073 220 4411	2-bed flat near the station
Megan Botha 084 120 5567	Buy · Townhouse · 2 bed · Brackenfell up to R 1,850,000

Thabo Mokoena
Close

HOW THEY REACHED US

Source Property24

Ad / campaign P24 ref 118420 – 3-bed Pinehurst

Added 02 Oct 2026, 13:22

CONTACT STEPS (1)

Call 02 Oct 2026, 13:22 Spoke to Thabo. Wants to see houses this weekend. Prefers WhatsApp during the day.

How Call Next follow-up 10/03/2026

What happened

e.g. Called, wants to view 3-bed houses in Durbanville on Saturday

Log contact step

CHANGE HISTORY

- 02 Oct 2026, 13:22 · Warren: Viewing booked for Sat, 03 Oct 10:00 at 7 Protea Street, Pinehurst (client invited); Status: "Contacted" → "Viewing booked"
- 02 Oct 2026, 13:22 · Warren: Contact logged: Call; Status: "New" → "Contacted"; Next follow-up: 2026-10-03
- 02 Oct 2026, 13:22 · Warren: Lead created

Archive
Edit lead

Statuses

Status	Use it when
New	Not yet contacted
Contacted	You've spoken or messaged
Viewing booked	A viewing is arranged (set automatically when you book a viewing)
Offer / application	An offer to purchase or rental application is in
Won	Deal done. Then click Add to past clients on the lead.
Lost	They bought elsewhere, stopped looking, or can't be reached

Editing and archiving

- Edit lead** (bottom right) changes any detail or the status. The change is recorded in the history.
- Archive** (bottom left) takes a lead off your active list. Nothing is deleted; tick **Show archived** to find it and **Restore lead** to bring it back.
- Export CSV** downloads your leads to open in Excel.

Several leads at once. Tap **Select** (next to Export CSV), tap each lead (a blue tick appears) or **Select all shown** after searching or filtering, then:

- **Archive selected** hides them; bring them back with **Show archived**.
- **Delete selected** removes them; tap it twice to confirm. You can delete your own leads; managers can delete any. A copy is kept in the backups.

Tap **Done** to leave select mode.

Typing a long note is safe. The list refreshes in the background, but a contact step you're typing is never wiped, even if you switch to WhatsApp and back.

Appointments and your Outlook calendar

Book viewings and meetings in the system and they go straight into your Outlook calendar, with the client's details and a reminder 30 minutes before.

Booking

1. Open the lead and click **Book appointment** in the **Appointments** box.
2. Choose the **Type** (Viewing, Valuation, Meeting, Signing, Call, Other), **How long**, **Date** and **Time**.
3. Add the **Address / place** and any **Notes** (gate code, where to meet).
4. Tick **Send ... an Outlook invitation** if you want the client to get an invite in their own calendar. It comes from your email address.
5. Click **Book appointment**.

The screenshot displays the Aska Property Group user interface. On the left, a sidebar shows navigation options: 'My leads' (1), 'Duplicates' (1), and 'Past clients'. Below this, a 'Today' summary mentions 'Johan Kruger: 3rd home anniversary · Priya Naidoo's birthday'. A search bar is present, followed by a list of upcoming appointments: 'Tomorrow 10:00 · Viewing' for Thabo Mokoena and 'Mon, 05 Oct 17:30 · Viewing' for Annelie van der Merwe. A status filter bar shows counts for 'All active' (5), 'New' (1), 'Contacted' (0), 'Viewing booked' (2), 'Offer / application' (1), and 'Won' (1). Below this is a table of clients and their search criteria.

CLIENT	LOOKING FOR
Thabo Mokoena Duplicate 082 314 7720	Buy · House · 3 bed · Durbanville, Pinehurst R 2,500,000 – R 3,200,000
Annelie van der Merwe 083 902 1145	Rent · Apartment / flat · 2 bed · Bellville up to R 12,000
Yusuf Adams 071 448 3390	Sell · Townhouse · Kenridge
Sipho Dlamini Just assigned Shortlist 073 220 4411	2-bed flat near the station
Megan Botha 084 120 5567	Buy · Townhouse · 2 bed · Brackenfell up to R 1,850,000

On the right, the 'Thabo Mokoena' lead profile is shown. It includes contact details (Mobile: 082 314 7720, Email: thabo.m@example.com, Prefers: WhatsApp) and an 'APPOINTMENTS' section. The current appointment is 'Tomorrow 10:00 Viewing' at 7 Protea Street, Pinehurst, with a 60-minute duration. It is marked as 'In Outlook calendar · client invited'. The appointment form allows users to 'Change' or 'Cancel' the appointment. It includes fields for 'Type' (Viewing), 'How long' (1 hour), 'Date' (10/02/2026), and 'Time' (10:00 AM). There is also a field for 'Address / place' (e.g., 12 Oak Avenue, Durbanville) and a 'Notes' section (e.g., Gate code 1234, meet at the show house). A checkbox option is available to 'Send Thabo an Outlook invitation (thabo.m@example.com)', with a note that it will go into the Outlook calendar with a 30-minute reminder. Buttons for 'Cancel', 'Book appointment', 'Archive', and 'Edit lead' are at the bottom.

It shows ✓ **In Outlook calendar** when it's in your calendar. Booking a viewing for a New or Contacted lead moves it to **Viewing booked**.

Moving or cancelling

- **Change** lets you move the date or time or change the details; Outlook updates too (and the client, if invited).
- **Cancel** removes it from your Outlook calendar; an invited client gets a cancellation. The cancelled appointment stays in the lead's history.

Important: always change and cancel appointments **in this system**, not in Outlook. Changes made directly in Outlook don't come back into the system.

If an appointment shows **Not in Outlook**, it is still saved here. Click **Try again**; if it still fails, tell the office manager.

Emailing a client

Emails you send from the system go out from **your own @aska.co.za mailbox**, with the Aska logo and your signature, and appear in your Outlook **Sent Items**. Replies come to your inbox as normal.

1. Open the lead and click **Email client** (shown when the lead has an email address).

- Under **Start from**, pick a ready-made message: *Thank you for your enquiry*, *Viewing confirmation*, *New listing for you*, *Follow-up*, or *Blank message*. The client's first name, areas and ad source are filled in for you.
- Edit the subject and message as you like. Don't type your name or details at the end; your signature is added automatically.
- Click **Send email**.

The screenshot shows the Aska Property Group interface. On the left, there's a sidebar with tabs: 'My leads' (1), 'Duplicates' (1), and 'Past clients'. Below this is a search bar and a calendar view showing upcoming viewings. The main area displays a list of clients with their details and what they are looking for.

CLIENT	LOOKING FOR
Thabo Mokoena Duplicate 082 314 7720	Buy · House · 3 bed · Durbanville, Pinehurst R 2,500,000 – R 3,200,000
Annelie van der Merwe 083 902 1145	Rent · Apartment / flat · 2 bed · Bellville up to R 12,000
Yusuf Adams 071 448 3390	Sell · Townhouse · Kenridge
Sipho Dlamini Just assigned Shortlist 073 220 4411	2-bed flat near the station
Megan Botha 084 120 5567	Buy · Townhouse · 2 bed · Brackenfell up to R 1,850,000

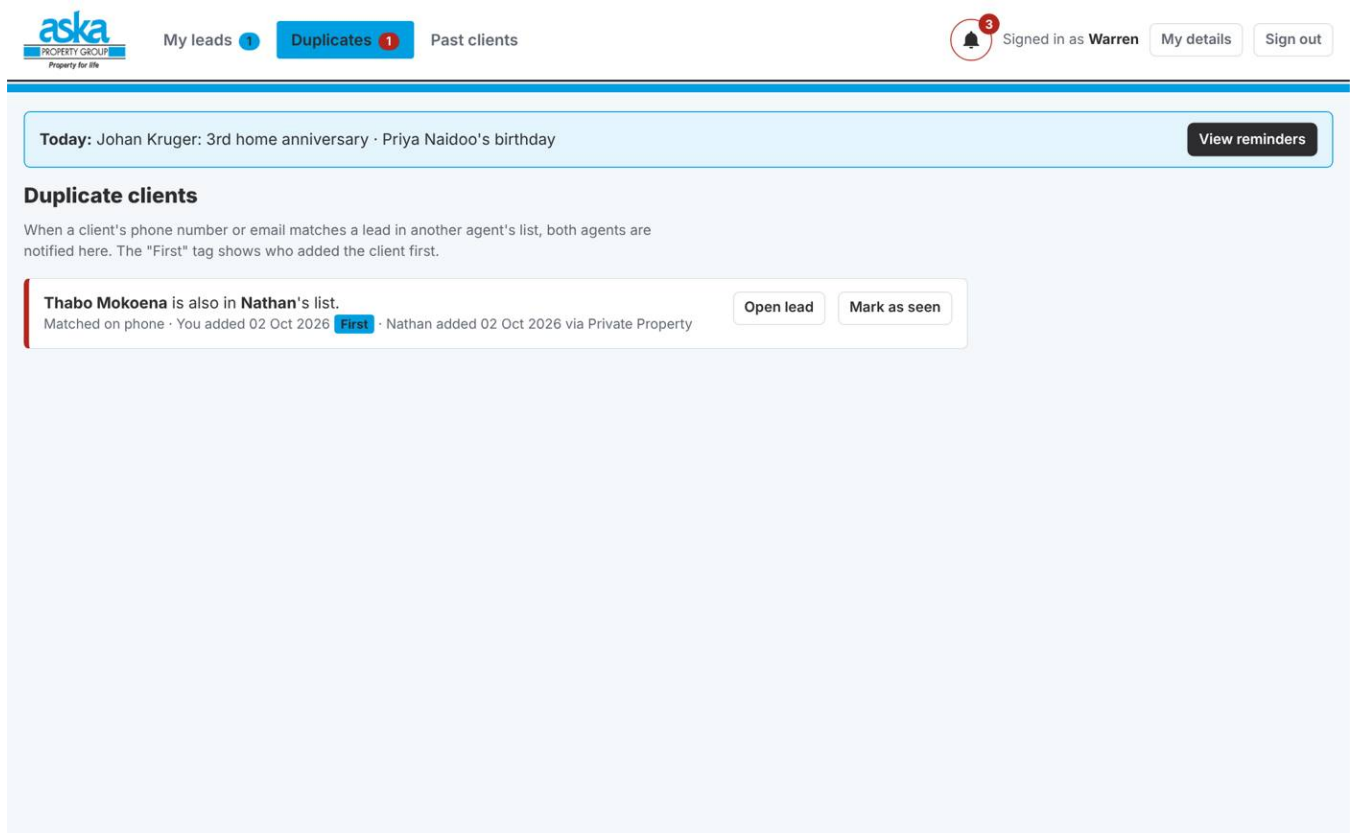
On the right, the 'Email client' window is open for Thabo Mokoena. It shows the 'To' field with the client's name and email, the 'Start from' dropdown set to 'Thank you for your enquiry', the 'Subject' field with 'Your property enquiry with Aska Property Group', and a large text area for the message body containing a pre-filled template. At the bottom, there are 'Cancel' and 'Send email' buttons.

- If you leave blanks in [square brackets], e.g. [address] or [time], the system warns you before sending.
- Every email is saved in the lead's **Contact steps** with the full message, and a **New** lead moves to **Contacted**.

Duplicate clients

When one of your clients has the same phone number or email as a lead in another agent's list, you both get an alert, so the office knows straight away when two agents are speaking to the same person.

- The **Duplicates** tab shows a red number for new alerts.
- Each alert names the other agent, what matched (phone or email), and when each of you added the client. The **First** tag shows who had them first.
- The lead itself shows a red **Duplicate** tag and a box with the details.
- You never see the other agent's notes, only that the client is also with them.



Today: Johan Kruger: 3rd home anniversary · Priya Naidoo's birthday [View reminders](#)

Duplicate clients

When a client's phone number or email matches a lead in another agent's list, both agents are notified here. The "First" tag shows who added the client first.

Thabo Mokoena is also in **Nathan's** list.
 Matched on phone · You added 02 Oct 2026 **First** · Nathan added 02 Oct 2026 via Private Property

[Open lead](#) [Mark as seen](#)

What to do: speak to the other agent (or the office manager) and agree who keeps the client. The manager can move the lead to the right agent. Click **Mark as seen** once you've dealt with it.

Leads from reception shortlists

Cindy keeps shortlists of people who want to be contacted (for example a rentals waiting list) and assigns each person to an agent. When she assigns someone to you, they appear in **My leads** straight away.

- The **My leads** tab shows a blue number until you open each new one.
- The lead is tagged **Just assigned** and **Shortlist**, its source is *Shortlist* and the shortlist's name is shown.
- Inside, a blue box says which shortlist they came from, who added them and when they were assigned to you.
- What they're looking for and Cindy's notes are under **Requirements**.

The screenshot displays the Aska Property Group software interface. On the left, a sidebar shows navigation options: 'My leads' (1), 'Duplicates' (1), and 'Past clients'. Below this is a search bar and a list of clients. The main area shows a lead for 'Siphso Dlamini' with details on its status, contact information, and appointment history.

Today: Johan Kruger: 3rd home anniversary · Priya Naidoo's birthday

Search name, phone, email, area, ad...

Tomorrow 10:00 · Viewing
Thabo Mokoena
7 Protea Street, Pinehurst

Mon, 05 Oct 17:30 · Viewing
Annelie van der Merwe
Unit 12 Oakhurst, Bellville

5 All active | 1 New | 0 Contacted | 2 Viewing booked | 1 Offer / application | 1 Won

CLIENT	LOOKING FOR
Thabo Mokoena Duplicate 082 314 7720	Buy · House · 3 bed · Durbanville, Pinehurst R 2,500,000 – R 3,200,000
Annelie van der Merwe 083 902 1145	Rent · Apartment / flat · 2 bed · Bellville up to R 12,000
Yusuf Adams 071 448 3390	Sell · Townhouse · Kenridge
Siphso Dlamini Just assigned Shortlist 073 220 4411	2-bed flat near the station
Megan Botha 084 120 5567	Buy · Townhouse · 2 bed · Brackenfell up to R 1,850,000

Siphso Dlamini Close

From shortlist: Rentals waiting list – Bellville
Added to the shortlist by Cindy on 02 Oct 2026 · assigned to you by Cindy on 02 Oct 2026

STATUS
New Next follow-up: not set

CONTACT DETAILS Email client

Mobile: 073 220 4411 Copy
Email: siphso.d@example.com Copy

APPOINTMENTS Book appointment
No appointments yet.

LOOKING FOR
Requirements: 2-bed flat near the station Moving in December

HOW THEY REACHED US

Source	Shortlist
Shortlist name	Rentals waiting list – Bellville
Added	02 Oct 2026, 13:22

Archive Edit lead

Contact them as soon as you can and log the contact step. Until you start working the lead, reception can still move it to another agent; after that only the office manager can.

Past clients, birthdays and home anniversaries

Keep in touch with clients after the deal: add them to **Past clients** and the system reminds you of their birthdays and the anniversary of the day they moved in, every year.

Adding a past client

- From a won deal: open the lead (status **Won**) and click **Add to past clients**. Their details are filled in.
- Anyone else (including clients from before the system): **Past clients** > **+ Add past client**.

Fill in the name, mobile, email, **birthday** (day and month; the year is optional), their **partner's** name and birthday, the **property address** and the date they **moved in**. Add notes that help you personalise wishes (kids, pets, hobbies).

My leads 1
Duplicates 1
Past clients

Coming up

Birthdays and home anniversaries in the next 30 days

Today
Fri, 02 Oct

Home anniversary
Johan Kruger: 3rd home anniversary
21 Wilger Street, Durbanville · 082 600 1234

Today
Fri, 02 Oct

Birthday
Priya Naidoo's birthday
079 345 6677

In 4 days
Tue, 06 Oct

Birthday
Johan Kruger's birthday (turns 47)
082 600 1234

In 18 days
Tue, 20 Oct

Home anniversary
Priya Naidoo: 5th home anniversary
5 Silverboom Ave, Kenridge · 079 345 6677

In 26 days
Wed, 28 Oct

Birthday
Megan Botha's birthday
084 120 5567

Past clients

Search name, address, phone...

CLIENT	PROPERTY
Johan Kruger 082 600 1234 · johan.k@example.com	21 Wilger Street, Durbanville
Megan Botha 084 120 5567 · megan.botha@example.com	9 Fynbos Close, Brackenfell

Add past client

Cancel

CLIENT

Name

e.g. Sipho Ndlovu

Mobile

Email

Birthday

Day ▼
Month ▼
Year ▼

PARTNER / SPOUSE (OPTIONAL)

Name

e.g. Lindiwe Ndlovu

Birthday

Day ▼
Month ▼
Year ▼

THEIR HOME

Property address

e.g. 12 Oak Avenue, Durbanville

Moved in on

mm/dd/yyyy 📅

Notes

How you're reminded

- **The bell** (top of every page) shows how many birthdays and home anniversaries are due in the next 7 days. Click it to see them.
- **A banner** appears on the day: *Today: Johan Kruger: 3rd home anniversary.*
- **Coming up** on the Past clients page lists everything in the next 30 days. Anything missed stays for 7 days until you deal with it.



My leads 1
Duplicates 1
Past clients


Signed in as **Warren**
My details
Sign out

Coming up Birthdays and home anniversaries in the next 30 days

Card library

Today
Fri, 02 Oct

Home anniversary
Johan Kruger: 3rd home anniversary
21 Wilger Street, Durbanville · 082 600 1234

Open
Send email
Mark as done

Today
Fri, 02 Oct

Birthday
Priya Naidoo's birthday
079 345 6677

Open
Send email
Mark as done

In 4 days
Tue, 06 Oct

Birthday
Johan Kruger's birthday (turns 47)
082 600 1234

Open
Send email
Mark as done

In 18 days
Tue, 20 Oct

Home anniversary
Priya Naidoo: 5th home anniversary
5 Silverboom Ave, Kenridge · 079 345 6677

Open
Send email
Mark as done

In 26 days
Wed, 28 Oct

Birthday
Megan Botha's birthday
084 120 5567

Open
Send email
Mark as done

Past clients

Search name, address, phone...
☐ Show archived
+ Add past client

CLIENT	PROPERTY	MOVED IN	BIRTHDAYS	NEXT
Johan Kruger 082 600 1234 · johan.k@example.com	21 Wilger Street, Durbanville	02 Oct 2023 3 years	Johan: 6 Oct Elmarie: 14 Mar	Today · home anniversary
Megan Botha 084 120 5567 · megan.botha@example.com	9 Fynbos Close, Brackenfell	15 Nov 2025 Under a year	Megan: 28 Oct	In 26 days · birthday

Sending wishes

1. Click **Send email** on the reminder.
2. Pick a **card** from the library, or **No card – just an email**.
3. Check the message (it's filled in with their name, the number of years and their street) and click **Send email**.

The card appears at the top of the email, above your message, with your signature.
Sending ticks the reminder off and records which card went out.

My leads 1 Duplicates 1 **Past clients**

Coming up

Birthdays and home anniversaries in the next 30 days

Today Fri, 02 Oct	Home anniversary	Johan Kruger: 3rd home anniversary 21 Wilger Street, Durbanville · 082 600 1234
Today Fri, 02 Oct	Birthday	Priya Naidoo's birthday 079 345 6677
In 4 days Tue, 06 Oct	Birthday	Johan Kruger's birthday (turns 47) 082 600 1234
In 18 days Tue, 20 Oct	Home anniversary	Priya Naidoo: 5th home anniversary 5 Silwerboom Ave, Kenridge · 079 345 6677
In 26 days Wed, 28 Oct	Birthday	Megan Botha's birthday 084 120 5567

Past clients

Search name, address, phone...

CLIENT	PROPERTY
Johan Kruger 082 600 1234 · johan.k@example.com	21 Wilger Street, Durbanville
Megan Botha 084 120 5567 · megan.botha@example.com	9 Fynbos Close, Brackenfell

Send wishes

Cancel

Johan Kruger <johan.k@example.com>

No card
just an email

Card

Subject
Happy 3rd home anniversary!

Message

Hi Johan,

Can you believe it has been 3 years since you moved into 21 Wilger Street? Happy home anniversary! I hope you are still loving it.

If you ever need anything property-related, or know someone who is looking to buy or sell, I am always happy to help.

Kind regards,

The card (if you pick one) appears at the top of the email, above your message. Your signature and the Aska logo are added automatically. Sending this marks the reminder as done.

Cancel **Send email**

If you sent wishes another way (a call, WhatsApp, a card in the post, a gift or a visit), click **Mark as done**, choose how, add a note and save. It's recorded in the client's history.

My leads 1 Duplicates 1 **Past clients**

Coming up

Birthdays and home anniversaries in the next 30 days

Today Fri, 02 Oct	Home anniversary	Johan Kruger: 3rd home anniversary 21 Wilger Street, Durbanville · 082 600 1234
Today Fri, 02 Oct	Birthday	Priya Naidoo's birthday 079 345 6677
In 4 days Tue, 06 Oct	Birthday	Johan Kruger's birthday (turns 47) 082 600 1234
In 18 days Tue, 20 Oct	Home anniversary	Priya Naidoo: 5th home anniversary 5 Silwerboom Ave, Kenridge · 079 345 6677
In 26 days Wed, 28 Oct	Birthday	Megan Botha's birthday 084 120 5567

Past clients

Search name, address, phone...

CLIENT	PROPERTY
Johan Kruger 082 600 1234 · johan.k@example.com	21 Wilger Street, Durbanville
Megan Botha 084 120 5567 · megan.botha@example.com	9 Fynbos Close, Brackenfell

Johan Kruger

Close

In 4 days
Tue, 06 Oct
Birthday
Johan Kruger's birthday (turns 47)
Send email Mark as done

Today
Fri, 02 Oct
Home anniversary
Johan Kruger: 3rd home anniversary
Send email Mark as done

MARK AS DONE
How did you send wishes?

Call

Note (optional)
e.g. Sent a bottle of wine
Cancel **Mark as done**

CLIENT
Name: Johan Kruger
Mobile: 082 600 1234 Copy
Email: johan.k@example.com Copy
Birthday: 6 Oct 1979
Partner: Elmarie Kruger
Partner's birthday: 14 Mar

Archive Send email **Edit**

Reminders come back every year. If a client no longer wants contact, open them and click **Archive**: no more reminders, but their record is kept.

Card library

The card library holds the office's birthday and home anniversary cards; everyone can use every card. Open it from **Past clients > Card library**.

Uploading a card

1. Click the picture box and choose a picture: JPG, PNG or GIF (for example a design from Canva).
2. Give it a name, e.g. *Balloons*.
3. Choose **Use for**: Birthdays, Home anniversaries or Any occasion.
4. Click **Upload card**.

Large pictures are shrunk automatically so the email sends quickly. A GIF must be under 2.5 MB.

Each card shows who added it and how many times it's been sent. **Archive** a card you no longer want offered (the person who uploaded it, or the manager, can do this); it can be restored with **Show archived**. When you send wishes, birthday cards are offered for birthdays and home anniversary cards for anniversaries, plus any-occasion cards for both.

Stock and listings

The system has three sections at the top: **CRM** (your leads, duplicates, past clients), **Stock** and **Listings**. Everyone can look up stock and listings; only the people the manager has allowed ("Stock editor") can add, change or remove them.

Finding stock quickly

- **Type:** tap **Plot**, **Plot & Plan** or **Spec** (or **All**). Stands sold as "plot or plot & plan" show under both.
- **Bedrooms:** e.g. *3+ bedrooms*.
- **Property24:** *On Property24* shows only stock with a Property24 link.
- **Price from / to:** type amounts in rand, e.g. 1500000.
- **Search** finds an erf number, street, phase or seller. None of the filters is compulsory; use any combination.

Each card shows the main photo, price, erf, address, sizes and bedrooms. A **P24** tag means it's on Property24.

Opening a property

Tap a card to see everything: photos, price, type, status, erf, development, phase, address, seller, plot and house size, bedrooms, bathrooms, garages, listing agent, the write-up, extras, plans and price lists, and internal notes.

- **View on Property24** opens the listing; **Copy link** copies it to paste into WhatsApp or an email.
- **Copy write-up** copies the description to send to a client.
- Tap the small photos to flip through them.

Downloading photos (e.g. at a viewing)

- **Download this photo** saves the photo you're looking at.
- **Download all photos** saves them all in one zip file. On iPhone, open it from the Files app; on Android and computers it opens like a normal folder.
- On a phone you can also press and hold a photo and choose **Save** or **Share**.

Photos from Property24. When a property has a Property24 link, the system can copy the listing's main photo in for you and make it the main photo:

- **Use Property24 photo** (on the property, under the photos) copies it for that one property.
- **Get Property24 photos** (at the top of Stock) does it for every property that has a P24 link but no photo yet.
- When you save a new P24 link on a property with no photos, it happens by itself.

Only the main listing photo is copied. Add any others with **Add photos**.

Sending a client a list of what's available. Filter the stock (for example, tap **Plot**, choose bedrooms or a price range), then tap **Download PDF**. You get an Aska-branded PDF of exactly what's on your screen, in the same order, ready to email or WhatsApp:

- **Plots:** land size, address and price.
- **Spec houses:** house size, land size, bedrooms and price.
- **Plot & plan:** land size, house size (when there's a plan) and price.

Each property shows its main photo (choose it with **Make main photo**) and a **View on Property24** link when a Property24 link has been added (Edit → P24 link). Your name, phone and email go in the footer, so fill them in under **My details**. Seller details and internal notes never appear in the PDF.

To send it on WhatsApp, use Share PDF. It opens your phone's or Mac's share menu with just the PDF attached, so the client gets the file and no link. If you use **Download PDF** instead, attach the file from your Downloads folder (drag it from Finder, or tap the paperclip in WhatsApp). Don't drag it from the browser's download list, because that adds a link that only works on your own computer.

For stock editors: adding and changing stock

1. On **Stock**, tap + **Add property**. Nothing is compulsory: fill in what you know (type, erf, price, address...) and add the rest later. For a spec house choose **Ready** or **Under construction**.
2. Tap **Save and add photos**, then **Add photos** and choose them all at once from your phone or computer. Large photos are made smaller automatically.
3. **Make main photo** chooses the photo shown on the card. **Add documents** uploads plans and price lists (PDF, Word, Excel or pictures).
4. **Edit** changes any detail; every change is recorded under *Change history*.
5. **Remove** takes a property off the stock list (e.g. once sold). It isn't deleted: tick **Show removed** to find it and **Put back** if needed.

Import from Excel (stock editors): choose the stock spreadsheet (.xlsx). The system shows what it found before importing. Importing the sheet again later updates the erfs already in the system and adds new ones; photos and changes made in the system are kept.

Listings works the same way. Once Property24 gives Aska access to PropCtrl, listings will appear there by themselves; until then editors can add them by hand.

Removing several at once (stock editors). Tap **Select**, tap each property you want, or use **Select all shown** after filtering, then tap **Remove selected** and confirm. Removed properties are hidden, not deleted. Tick **Show removed**, select them and tap **Put back**

selected to bring them back.

Sold / Archived. Under **Listings** there are two tabs: **Current listings** and **Sold / Archived**. Any property marked Sold moves off Stock and Listings into Sold / Archived two weeks after it was sold.

On each card. The full address (street, development, area) shows under the erf. **P24** ↗ opens the Property24 listing and **Aska** ↗ opens the property's page on askaproperty.co.za, straight from the card.

More filters. Besides type, price, bedrooms and Property24, the **Any seller** list shows only one seller's properties (spellings like "(Pty) Ltd" and "C/O ..." are grouped together).

Inside a property (stock editors):

- **Fill details from Property24** fills empty bedrooms, bathrooms, garages, sizes, write-up and extras from the listing. Nothing you typed is overwritten. The button at the top of Stock does every property with a P24 link.
- **Link Aska website** (top of Stock) adds each property's askaproperty.co.za page, matched on the Property24 number; it also runs every morning.
- **View on Aska website · Share · Copy link** send clients to our own website instead of Property24.
- **Not for maps – no board on this erf** turns the erf **orange** on the Maps so the signage team knows not to put up a board.
- Documents and photos open on top of the app with ← **Back**.

Seller approval. Before a listing goes live, open it and use **Seller approval** to send the seller a private preview link (by email, WhatsApp or copy). The seller sees the photos, price and write-up and taps **Approve** or **Ask for changes**; you and the managers are notified.

Photo schedule (Katie and stock editors). **Photo schedule** at the top of Stock lists what needs photos. Katie gets an email when new stock is loaded; spec houses need new photos every 14 days until **House 100% complete** is ticked; reminders go out on weekdays at 07:00. Tap **Photos taken today** after a shoot. **Email me the list** or **Print the list** gives a photo run of everything with no photos and no Property24 link, grouped by phase.

From PropCtrl. Once PropCtrl's feed is switched on, listings loaded or changed in PropCtrl come in by themselves every hour (price, details, write-up, photos, status and the Property24 link). A property already here is updated; a new one is added under Listings.

Sales

Sales is its own tab at the top, next to CRM, Stock and Listings. It replaces the *Aska Estates Transactions* SharePoint list and the Power Automate flows, and only people the manager has ticked can see it.

Adding a sale. Tap **+ Add sale**, start typing the erf or street in *Property on Stock / Listings* and pick it from the list. The details fill in by themselves. Add the type, agent, purchaser, attorneys and dates as you know them. Nothing else is compulsory.

What happens on its own

- The property shows **Under offer** on Stock as soon as the sale is added.
- When the bond is **Completed** or guarantees are **received**, the property shows **Sold**, and two weeks later it moves to Listings › Sold / Archived. On the sale, the **Bond completed** and **Guarantees received** buttons do this in one tap.
- At the same time the architect is emailed, with the office, the agent and the builder copied (not for plot-only sales). Milnerton Estates sales also email Maria and Tanya.
- Weekdays at 08:00, the office and the agent get a reminder 5 days before a bond or guarantees due date (on Fridays it also covers the weekend), and a to-do is added.
- Spec sales: Katie is emailed to order a gift 6 weeks before the expected registration date.
- Build at 50% or more: Katie and Cindy are emailed to order the gift, and a to-do is added.
- Plot sale with a building contract: a building contract row is created automatically and kept up to date from the plot sale. When the plot is registered, the building contract is marked registered, Jason gets a *check build progress* to-do, and the plot moves to **Past transactions**.
- Gift delivered plus testimonial received: the sale moves to **Past transactions**.
- Cancelling a sale puts the property back to **Available**.

To do. Reminders that used to go to Planner now show at the top of Sales and on the sale itself. Tick them off when done. You can add your own with **+ To do** on a sale.

Finding sales. Use the tabs **Current**, **Due / overdue**, **Past transactions**, **Cancelled** and **All**, filter by type, or search. Overdue and due-this-week deals are marked and sorted to the top.

Capturing tips.

- Everything in Sales shows in **capital letters** so it looks uniform (emails stay as typed).
- The list shows the **address** next to each erf.

- **Attorneys:** add the contact person, phone and email. They're filled in by themselves the next time you pick the same attorney.
- **Back-dated sales:** tick **Captured after the fact (back-dated)** when loading an old sale. No emails, to dos, reminders, testimonials or notifications go out for it.
- **Due flag:** only the bond or guarantee dates you entered are watched, and the flag says what is due (Bond, Guarantees, Deposit or Registration). It stops once the bond is completed or guarantees are received.
- Documents on a sale (OTP, FICA and so on) open on top of the app; tap ← **Back** to return to the sale.

Email settings (manager). Under **Sales › Email settings** you can change who gets each email: the office team, Katie, Milnerton Estates, and the builders' and architects' addresses. Automatic emails send once email is set up; until then they wait for up to 3 days. Every sale shows which emails went out and when.

Importing from SharePoint (manager). In SharePoint, show all columns of *Aska Estates Transactions* and choose **Export › Export to CSV**. Then in Sales tap **Import from SharePoint**, choose the file, check the preview and tap **Import**. Agents are matched by their initials (NG, WG, CC), so add everyone under Agents first. Nothing is emailed for imported sales, and importing again updates the same rows instead of adding them twice.

Who sees what (manager, Agents › Edit). Each person has these ticks:

- **View stock** and **Add stock** (add, edit, photos, remove)
- **View listings** and **Edit listings**
- **View agent's sales:** only the sales where they are the agent
- **Edit sales:** add and update the sales they can see
- **View building contracts:** every building contract and no other sales (for Jason)
- **View reports:** the monthly seller reports for the properties where they are the listing agent (preview only)
- **Send reports:** also add the seller's email and a note, and email those reports

Managers see and do everything. Tabs a person has no access to don't appear for them.

Testimonials

When a **building contract** is updated to **100%**, or a **spec house** is marked **Registered**, the system emails the purchaser and the seller a link to the Aska testimonial form. Sellers that are Milnerton Estates are skipped. The email goes from the agent's mailbox.

- The form asks for name and surname, a short write-up, which team member helped, and whether Aska may share it.

- The purchaser gets a reminder every week, up to 4 times, until they reply.
- When someone replies, the managers and the agent get a notification, and the purchaser's reply ticks **Testimonial received** on the sale.

The **Testimonials** tab has four lists:

- **To send:** sales that finished before this was set up, or where an email address is missing. Add the email and tap **Send now**. Old sales are never emailed automatically.
- **Waiting:** requests sent, with the reminders so far and the next reminder date.
- **Received:** the answers, with a Copy button and whether it may be shared.
- **No reply / stopped.**

Managers can change the email wording and the team list under **Email wording & team**.

Reserved plots

When a client reserves a plot, record it in the **Reserved** tab so nobody else sells it. Tap **+ Reserve a plot** and fill in:

- the erf number (and phase if needed)
- the client's name and contact number
- the seller (left blank, it is taken from Stock)
- the steps already done: FICA documents, Sent wishlist, Received plans, OTP signed, Building contract signed

Everyone can see all reservations. Only the agent on the reservation (or the manager) can tick steps, edit or cancel it. Open a reservation to tick steps as they happen, or to call or WhatsApp the client.

A plot can only be reserved once at a time, and not once it is in Sales. The Stock entry changes to Reserved, and back to Available if the reservation is cancelled. When the erf is captured in Sales, the reservation closes by itself under **Became a sale**.

On the Maps a reserved plot is **light pink**. Tap or hover over it to see the steps done, the purchaser, the seller and the agent.

Maps

The **Maps** tab shows two Sandown plans, Phases 5A–6L and Phases 7A1–7A6 (tap a name at the top to jump to it), black and white, with plots coloured from the system:

- **Blue: sold (Aska Estates).** The erf has a sale in Sales that isn't cancelled.
- **Green: for sale.** The erf is on Stock or Listings and still Available.

The map and its PDF **update by themselves** whenever a sale or a stock item is added or changed, usually within half a minute. Tap **Download current map** for the latest PDF. A dated copy is also kept every **Sunday morning** under *Sunday copies*, and managers can **Save a dated copy now**. Street names are the current ones (Sugarbird, Woodpecker and Siskin Street included). Hover over a plot to see its erf number.

Plot details on the map. Hover over a green (for sale) plot to see its price, status, type, address, plot size, agent and seller. Click the plot to keep the pop-up open, then use **Open in Stock** (or Listings) or **Property24**. Details only show for the sections you have access to.

Finding on the maps.

- **Find erfs:** type one or more erf numbers (e.g. 1135, 1136, 1200) and tap **Show only these**. Only those erfs show, in their real colours.
- **Find plots:** tap one or more types (Plots, Plot & plans, Spec houses, Houses) and add a price range, bedrooms or a **Seller**. Only matching available plots stay green.
- **Print, Download and Share on WhatsApp** use the same filters and add a page of plot details (never seller details).

Colours: blue = sold, green = for sale, light pink = reserved, **orange** = no board on this erf, **yellow** = bond or guarantees due within a week, red = overdue.

Show days

After a show house, record it on the property so it appears on that month's seller report. Open the property in Stock or Listings, scroll to **Show days** and tap **+ Show day**. Then fill in:

- the date and the times it was on show
- the number of visitors (groups through the house)
- **The visitor count is for this house only:** tick this only if you counted this house on its own. A shared count across several show houses is never shown to the seller.
- **Feedback for the seller**, which is printed on the report. Never include buyers' names or numbers.
- internal notes, which stay in the system only.

You can edit or remove show days you added; the manager can edit any of them. The seller's report lists each show day of the month and marks it on the daily views chart.

Seller reports (manager)

The **Reports** tab (managers, and agents given View reports or Send reports for their own listings) makes each seller a monthly Aska-branded PDF of how their property did on Property24, on Facebook and Instagram, and on the Aska website, and emails it once you have checked it. Reports never show buyers' names or numbers, advert spend or show-day visitor counts.

Each month (from the 2nd) you get a notification. Then:

1. In Reports, drag the **Send to Aska Leads** button to your browser's bookmarks bar (once only).
2. Sign in to the Property24 agency portal yourself, open **Listings** and click the bookmark. A small window counts through the listings; keep the Property24 tab open until it says finished. New active listings are added to Listings and P24 prices and statuses are updated.
3. In the portal open **Promoted Listings** and click the bookmark again, so the reports show which promotions ran.
4. Facebook, Instagram and website figures are pulled automatically on the 2nd; **Pull Facebook, Instagram & website now** fetches them again.
5. Check the table. Tap a row to add the seller's email (several: separate with ;) and an optional note from the agent; **Preview** opens the PDF. Posts or web pages the system could not match appear under *Not matched to a property yet*: pick the property.
6. Tick the reports to send and tap **Send**, then confirm. Each email goes from the property's agent's mailbox with the PDF attached; the sent date shows in the table. A seller's email is remembered for next month.

Another month: pick it in the month list, then tap *Collect ... instead* before clicking the bookmark.

Connections & email holds the Meta and Google Analytics connections (set up once, see the IT setup doc) and the email wording. {seller}, {address}, {month} and {agent} are filled in.

Facebook, Instagram (Meta) and the Aska website (Google Analytics) are connected, so **Pull Facebook, Instagram & website now** fills in the social reach and website views. A post that isn't about one property can be marked **Not about one property**. Property24 views and leads still come from the bookmark.

The phone app and notifications

Aska Leads works as an app on your phone. It's the same system as on the computer, not a copy: you can add leads, log contact steps, book appointments (they go into your Outlook calendar) and email clients, and everything you do shows up on your computer too.

Put it on your home screen (once):

- **iPhone:** open the system's address in **Safari**, tap **Share** (the square with the arrow), then **Add to Home Screen** and **Add**. From now on, open Aska Leads from the icon.
- **Android:** open the address in **Chrome**, tap **⋮**, then **Install app** (or **Add to Home screen**).

Turn on notifications (on each phone or computer you use): tap **My details**, then under *Notifications on this device* tap **Turn on notifications** and **Allow**. Tap **Send a test** to check. You'll be notified when:

- a new lead comes to you (from the website, Property24, Private Property, reception or the manager)
- one of your clients enquires again
- a client of yours is also with another agent (duplicate)
- a past client has a birthday or home anniversary today (at 8:00)

Tap the notification to open the lead. On iPhone, notifications only work from the home-screen icon (iOS 16.4 or newer).

Always up to date. The Home Screen and desktop app check for a new version by themselves. If you're in the middle of something, an **Update now** button appears instead of the app reloading.

Leads that come in by themselves

Property24 and Private Property enquiries become leads on their own, usually within 2 minutes. You don't type them in.

- **Property24 and Private Property:** Aska Estates reads the enquiry emails ("Contact Request" or "LISTING ENQUIRY") that arrive in the office mailbox, and anything sent to **leads@aska.co.za**. The client's name, number, email and the listing come across.
- **Who gets the lead:** an enquiry you forward to leads@aska.co.za goes to **you**. One that arrives straight in the office mailbox goes to the mailbox owner, who can reassign it.
- **Website forms:** enquiries from the Aska website arrive the same way once the web developer has connected the form.
- **Already your client?** The enquiry is added to the existing lead instead of making a new one.

Other Property24 emails (listing groups, approvals, account emails) and personal emails are never read.

Your own Property24 enquiries (only if they arrive in your own mailbox, not the office one): set up an Outlook rule once.

1. Outlook › **Settings** › **Mail** › **Rules** › **+ Add new rule**, name it **Portal leads → Aska Estates**.
2. Condition: **Sender address includes** **no-reply@property24.com**.
3. Second condition: **Subject includes** **Contact Request** (or make a second rule for **ENQUIRY**).
4. Action: **Forward to** **leads@aska.co.za** (press Enter so it turns into a bubble). Use **Forward**, not **Redirect**.
5. Untick **Stop processing more rules** and **Save**.

Managers: **Agents** › **Website & portal leads** shows the latest enquiries. **Check now** reads the mailbox at once; **Re-check last 3 days** goes back further (nothing is added twice).

Documents

The **Documents** tab holds the company's price lists, brochures, plans, forms and contracts. Everyone can search, open and download them; only the administrator adds, renames or removes them.

The folders **Land Sale**, **Spec House**, **FICA** and **Mandate** come first. For each folder:

- **Print folder** prints every document in it in one go.
- **Email folder** sends them all as attachments (very large folders go as a download link).
- **Download all** saves them as one zip file; each document still has its own **Open** and **Download**.

For managers and the administrator

- **View as** (administrator): on **Agents**, tap **View as ...** next to a person to see exactly what they see. It's read only; tap **Back to my view** in the yellow bar to return.
- **Agents page**: every section folds to its heading; tap a heading to open it.
- **Website & portal leads**: the leads mailbox, **Check now** and **Re-check last 3 days** (see *Leads that come in by themselves*).
- **PropCtrl feed**: **Agents** › **PropCtrl feed** › **PropCtrl settings** holds the feed codes, **Test connection**, **Preview listings**, **Bring in now** and the hourly check.

- **Address for agents:** the link used in welcome emails and shared links (to become <https://estates.aska.co.za>).

For Cindy: shortlists (reception)

As reception you see one page, **Shortlists**: you collect people who want to be contacted, then hand each one to an agent. You don't see the agents' leads.

Image — Shortlists

Creating a shortlist

Under **New shortlist**, type a name (e.g. *Rentals waiting list – Bellville*) and an optional note (e.g. *2-bed flats under R12 000*), then click **Create shortlist**. Your shortlists are listed on the left with how many people are waiting and how many are on each.

Adding people

1. Click a shortlist on the left.
2. Fill in **Name**, **Mobile** and/or **Email**, **Looking for** and any **Notes**.
3. Click **Add to shortlist**.

If the person is already a client of an agent, or already on another shortlist, a yellow warning appears under their name (e.g. *Already with Warren*). Check before assigning them, so the same client isn't given to two agents.

Made a mistake? Click **Edit** under the person's name (possible until they are assigned).

Assigning to an agent

1. Next to the person, choose the agent in **Choose agent....**
2. Click **Assign**.

The person immediately appears in that agent's **My leads**, marked as coming from your shortlist. The tabs **Waiting**, **Assigned** and **All** show who still needs an agent; the search box finds anyone on the list.

Changing the agent

Click **Change agent**, choose another agent and click **Move**. This works until the agent has started working with the client; after that, ask the office manager.

Tidying up

Rename changes a shortlist's name or note. **Archive** hides a finished shortlist; tick **Show archived** to see it again. Nothing is ever deleted.

Quick answers

Question	Answer
Can other agents see my leads?	No. Only you and the office manager. Other agents only learn that a client is also with you, through a duplicate alert.
I deleted something by mistake	You can't delete anything, only archive. Tick Show archived and click Restore .
I changed a detail by mistake	Open the lead: the Change history shows the old value. Edit it back.
The page won't open	Check your internet connection and that you're using the address from your welcome email. It works on any network. If it still won't open, tell the office manager.
I forgot my password	Ask the office manager to click Send login details . You'll get an email with a temporary password, and choose a new one when you sign in.
My emails don't show my mobile number	Add it under My details .
"Email isn't set up yet"	The office manager needs to finish the Microsoft 365 setup.
An appointment says <i>Not in Outlook</i>	Click Try again . If it still fails, tell the office manager; the appointment is saved either way.
I moved a viewing in Outlook, but the system shows the old time	Changes in Outlook don't come back. Click Change on the appointment in the system and set the new time; Outlook updates.
A client I'm working with shows Duplicate	Another agent also has them. Speak to them or the manager (see <i>Duplicate clients</i>).
Where do I see today's birthdays?	The bell at the top, the banner on the day, and Past clients > <i>Coming up</i> .
Can I use it on my phone?	Yes, in the phone's browser. Add it to your home screen.
I'm leaving the office or going on leave	Tell the office manager, who can move your leads to another agent.