

The background of the slide is a scenic photograph of a grassy field with a paved path leading into the distance. Several hot air balloons of various colors (blue, red, yellow, green, and heart-shaped) are floating in a blue sky with scattered clouds. A large, semi-transparent cyan circle is centered over the image, containing the title text. Two smaller circles, one yellow with a cloud icon and one blue with a pencil icon, are also present.

MRI Agency Central

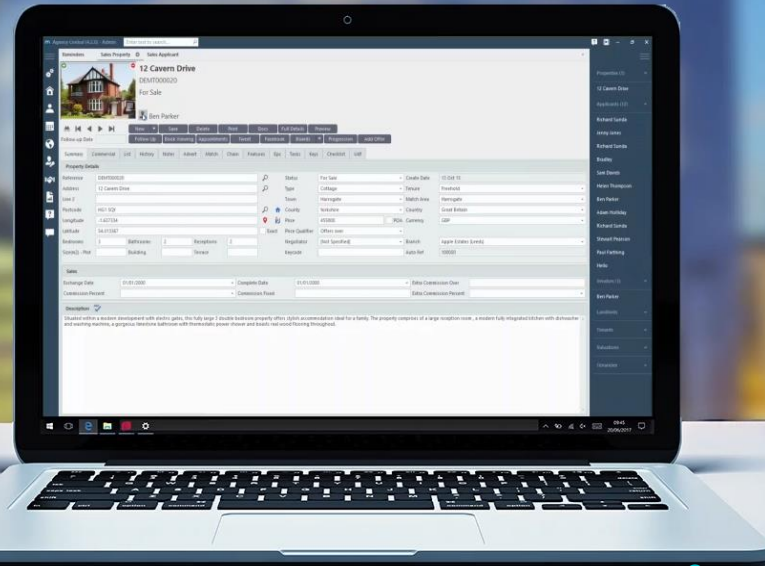
Getting Started Guide



Welcome to
Agency
Central

Estate & Letting Agency Cloud Based Software

YOUR QUICK START GUIDE



Setup & Login

New User Account

Your account has been set up and your login details are below.

The links below have some useful information to help you get started. We recommend you bookmark the pages for future reference and support:

- [Useful Information](#) - Relevant information and contact details to get you started.
- [Getting Started Guide](#) - A short guide outlining the basics of the system.
- [Online Video Demos](#) - Short tutorials on various aspects of the system.
- [iPad/Tablet Connectivity](#) - Connect to Universal Anywhere on your mobile or tablet device.
- [Mac Connectivity](#) - Connect to Universal Anywhere on your Apple Mac.

Please click on the server link below to access your logon page/desktop shortcut.

Server : server16.universalanywhere.net

User: DEMO1

Password: XXXXXXXX

Optional Features

Postcode Lookup (Credits): [More Information?](#)

Rentals Management: **Disabled** [More Information?](#)

Remember our friendly support team are only a phone call away.

Customer Services

Email: information@thesaurus.org.uk

Web: www.thesaurus.org.uk

Tel: 0845 83 82 666

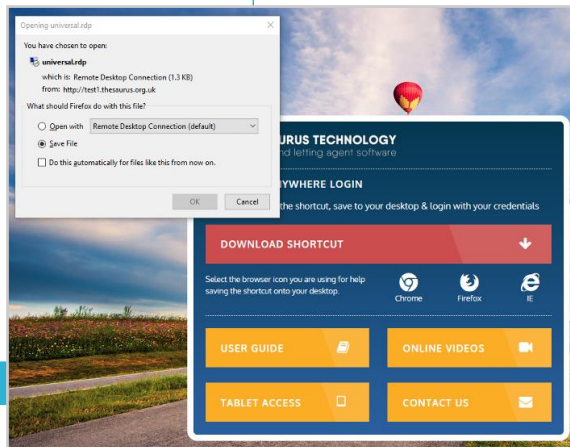
When you sign up to Agency Central, you will receive an email with your log in credentials.

This email will contain:

- Your user name(s)
- Password
- The server you connect to

The email will also let you know if rentals management is active on your account.

Click the sever link in the email and download the desktop shortcut.



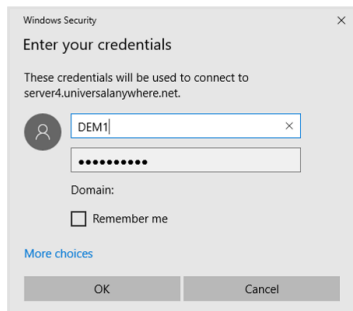
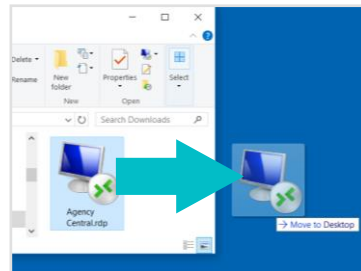
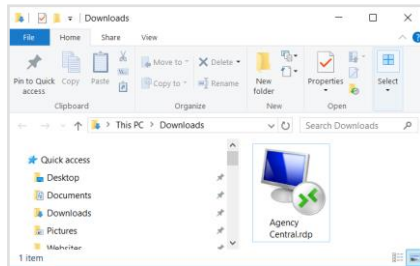
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Setup & Login

The shortcut will be saved in your 'downloads' folder on your computer.

Move the shortcut from the downloads folder to your desktop simply by dragging and dropping.



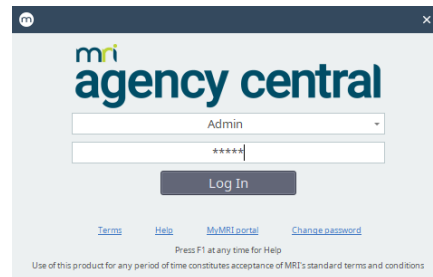
Once you have saved the shortcut to your desktop, when you double click on the shortcut, it will prompt you for your username and password. Enter the details you have been sent in the email.

If it does not ask for a username, you will need to click 'more choices'.

Please note: You will need to type these details in, you can't copy and paste them. Usernames and passwords are case sensitive.

Once logged in, a second log in screen will appear. If this is the first time you are using Agency Central, you will need to log in as the Admin user. The default password is '**admin**'.

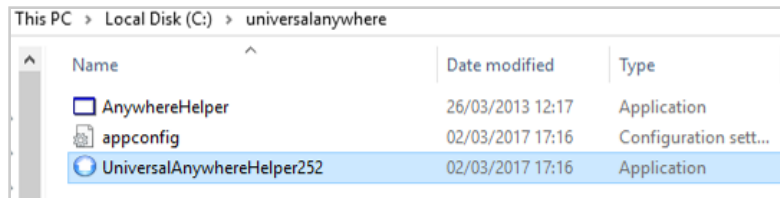
If you have used Agency Central before, you will be able to select your own personal username from the drop-down list.



Anywhere Helper

'Anywhere Helper' is a separate program which runs on your computer and assists with printing uploading images and documents.

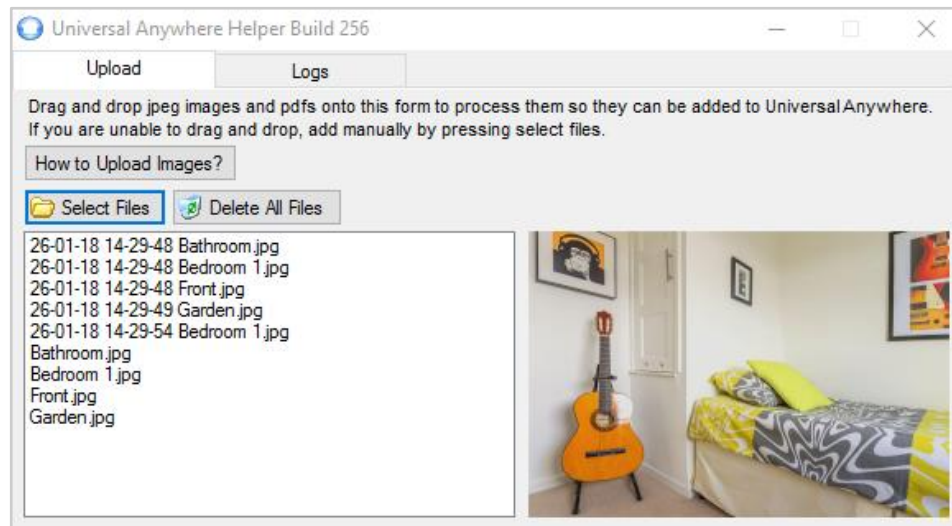
The first time you log in to Agency Central, it will prompt you to download the latest version of the Anywhere Helper. Once downloaded, you will need to run it for the first time, and it will then load automatically whenever you turn your computer on.



To run Agency Central Helper for the first time, you will need to go to the following folder on your computer:
C:\universalanywhere

Double click on the file called **UniversalAnywhereHelper** (It will also have a number at the end).

To upload files (images / PDFs) into Agency Central, you can either choose 'select files', or drag and drop the files into the white box.





"Online training sessions are a great way to help agents get up to speed with Agency Central. We can tailor the session to the user's ability & experience, so to maximise their benefit from the training. We can provide a general overview or focus on specific areas."

Stewart Pearson - Technical Help Desk Advisor

Book your online training session today



System settings

You can customise Agency Central via **Tools > Maintenance (system settings)** - Key areas to change are:

USERS



Settings > Maintenance > User IDs

- Add staff members
- Set access levels for each user
- Change passwords

DEFAULT LISTS



Settings > Maintenance > Lists

- Add towns, areas, counties
- Update property types
- Multiple lists to customise

SEND SMS



Tools > Maintenance > System > SMS

- Set your company name
- 100 Free SMS credits on signup
- Top up credits online – [Click here](#)

PROPERTY SEARCH



Settings > Maintenance > Property Search

- Set your default colours
- Control what gets uploaded
- Set default disclaimer

PORTAL UPLOADING



Settings > Portal Uploading

- Request property portals uploads
- Send to Rightmove, Zoopla + more
- View current feeds setup

USER DEFINED DATA



Settings > Maintenance > UDF

- Create your own data fields
- Setup textboxes or select boxes
- Bespoke data records

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Finding your way around Agency Central

Global Find
Search across the
whole database

Recent Records
Quick reference to
previous records

Navigation Bar
Find, create, save &
delete records

Main Buttons
Navigate to the
main windows

The screenshot displays the Agency Central (4.2.13) Admin interface. The top navigation bar includes a search field and a 'Global Find' button. The left sidebar contains a 'Navigation Bar' with links to Settings, Property, Sales Properties, Rentals Properties, Key Management, Comparables, People, Calendar, Web Tools, and Rentals. The main content area shows a property record for '12 Rosemary Lane' (DEMT000023 - Under Offer) by Ben Parker. The record includes a photo, a 'Follow-up Date' field, and a 'Main Buttons' section with 'New', 'Save', 'Delete', 'Print', 'Docs', 'Full Details', and 'Preview' buttons. Below this is a 'Summary' tab with a 'Property Details' section containing fields for Reference, Address, Line 2, Postcode, Longitude, Latitude, Bedrooms, Bathrooms, Receptions, Size(m2), Plot, Building, Terrace, Status, Town, County, Type, Price, POA, Currency, Price Qualifier, Negotiator, Keycode, Branch, and Auto Ref. The 'Sales' section includes fields for Exchange Date, Complete Date, Extra Commission Over, Commission Percent, and Commission Fixed. A 'Description' field at the bottom provides a detailed note about the property.

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"The online training videos provide customers with an excellent overview of some of the key areas within our system. They are great for new users to the software, or those who need a quick recap. As we update the software, we will also update the videos."

Richard Sunda- *Technical Help Desk Advisor*

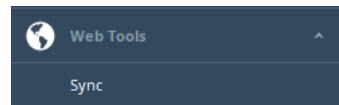
[Browse all of our training videos online](#)



Uploading property data

To upload your property data to the internet, and update the property portals, select 'Web Tools' on the left-hand menu, and select sync. Syncing your data will:

- Update the supplied 'Property Search' for your website
- Provide links/images when emailing property details to applicants
- Upload property data to the portals you have signed up for (optional)
- Upload data for vendors and landlords



Property Portals

In Agency Central you can specify which property portals you would like us to upload your data to.

Settings > Portal Uploading > Request a portal upload

In order to update your properties on the internet with any changes, new properties, or properties to be removed, you will need to do a Sync whenever any changes are made in Agency Central.



Email & Print Templates

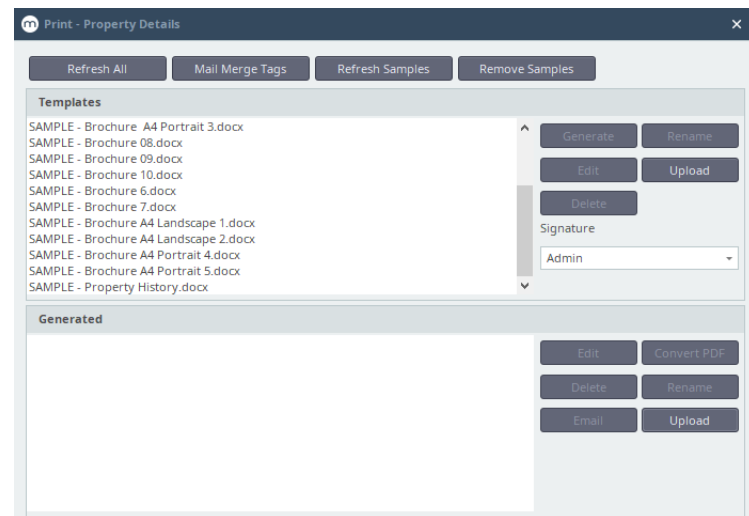
Agency Central comes with a large range of templates that can be mail merged into either Microsoft Word or HTML email templates. Templates can be fully customised to include your company artwork and contact details. Once setup, generating your standard letters and documents or property particulars will be simply done with the click of a button.

Editing your templates

To edit templates in Agency Central, select a document then select 'Edit'. Then Word or the HTML editor will open for you to start making changes.

Mail merge tags can be inserted into the templates and they will pull through the relevant database fields. To see this list, select the 'Mail Merge Tags' button on any print or email window.

When a document or email is generated the mail merge tags on the document will be replaced by all the relevant information from the database. This can then be printed/emailed and a copy is kept on the system and displayed in the 'Generated documents'.



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The helpdesk can update all of the sample Word templates with your letterhead. Contact them today for assistance...





"We are constantly improving and developing the software. The vast majority of changes we make to Agency Central come from suggestions and feedback from our clients who use the system every day. If you have any feedback or ideas, we would love to hear them...."

Adam Holliday - Lead Software Developer

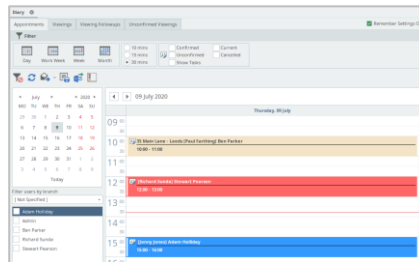


Diary

Agency Central has a built in diary system enabling staff to be aware of all appointments, viewings and meetings for everyone in the office. These include:

- Viewings
- Financial
- Keys handover
- Valuations
- Tasks
- Plus custom types

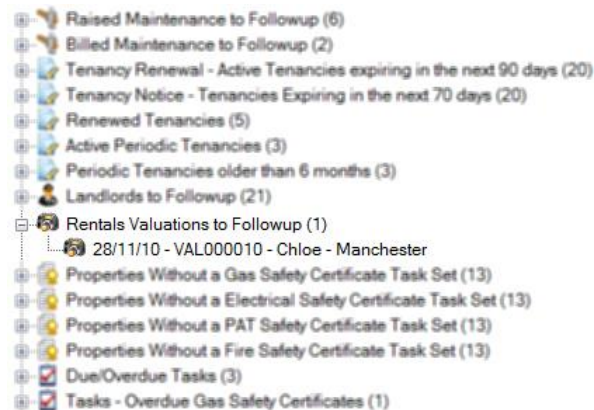
The diary enables users to follow up viewings that have taken place, so you can keep track of the appointments in each section. You can also export contacts and diary appointments to Microsoft Outlook.



Reminders

The reminders dialog gives an overview of outstanding personal and office tasks to be performed ensuring you never miss a follow up. Some of the examples include

- Viewings
- Valuations
- Landlord/Vendors
- Pending offers
- EPC
- Unpaid invoices
- Keys checked out
- Due/Overdue rents
- Tenancies expiring



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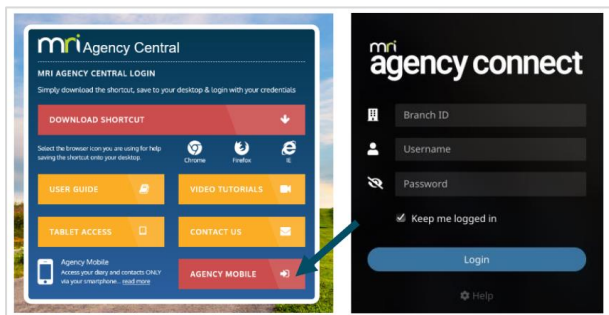
Create up to three custom diary appointment types in Agency Central
Settings > Maintenance > System Settings > Diary User Defined 1-3



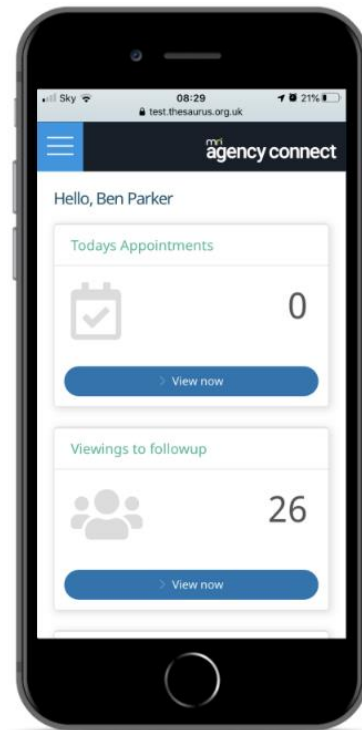
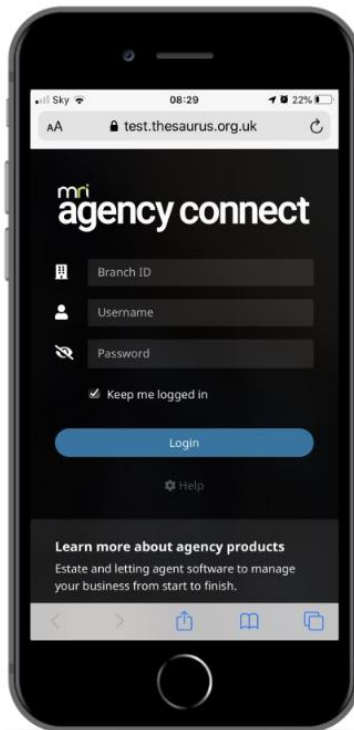
Agency Connect

Agency Connect enables staff members to access key data directly from Agency Central.

- Real time data directly from Agency Central
- Specifically designed for smartphones
- Ideal for when staff members are out of the office
- Grant or revoke staff access via Agency Central



VIEW HELP GUIDE ON AGENCY CONNECT



Useful information

Agency Central is designed to be easy to use but also has features which some clients may need extra help with. The MRI support team provide help in every area of the software.

Help desk phone line **01423 50 99 85**

Unlimited phone support is provided Monday to Friday: 9.00am and 5.30pm / Saturdays: 10.00am - 4.00pm

You can also contact the help desk via the client portal: <https://mymri.force.com/ClientPortal/login>



WEBSITE DESIGN



We have been building websites for estate agents for over 12 years & launched over 300 websites. We offer a professional & affordable service.

[Click here for details >](#)



ONLINE TRAINING



Remote training is available to new & existing customers. Training lasts for 1-2 hours & can involve a detailed look or a simple overview.

[Click here for details >](#)



TRAINING VIDEOS



The online training videos provide customers with an excellent overview of some of the key areas within Agency Central.

[Click here for details >](#)

