Property Solutions

Registration

and

Account Administration

User Guide

Welcome to NW Property Solutions

To go to the web site use the URL:

www.nwpropertysolutions.co.uk

From here, you are able to

- Register your company, or
- Log in as an existing user

As a registered user you are able to undertake a range of account administration activities. The specific activities you are able to undertake are dependent upon the type of user you have been registered as – Normal; Branch or Super. The activities are described in this User Guide.

The web site is designed to operate with all of the main web browsers e.g. Internet Explorer 8 and above; Firefox; Chrome; Opera; Safari etc.. Should you experience any problems then do not hesitate to contact the Property Solutions team.

Contents

Registration

Registration is straightforward. Just be sure to complete all the fields marked with *

The form is divided into two sections – **Contact Details** and **Payment Details**.

If the Payment Details are the same as Contact Details there is no need to complete this second section.

Use the **Postcode** and **Address Finder** to simplify the completion of the address fields.

Type in **Postcode**, then click on **Find Address**.

Then select the correct address from the list displayed. All of the address fields in that section of the form will be auto completed.

Tick this box if **Payment details** are same as **Contact details**

Type in a memorable password and re-type it to confirm. This is the password you will use to log in when your user account is set up.

Note that the password must be at least eight characters long and contain both alpha and numeric characters

Tick the box confirming you have read and agreed to the reseller agreement terms.

Click on the [Submit >] button.
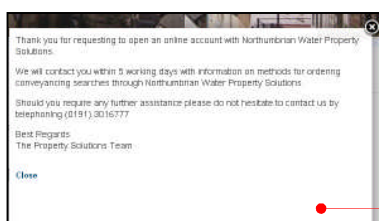
After clicking on the **Submit** button the form is validated. If any required fields are not completed, or required boxes not ticked or your password does not comply with the requirements, then the 'offending' item will be highlighted in **red** and details displayed at top of form.

When the Registration form has been accepted you will see the message shown here.

When your online account has been set up, the next thing you will need to do is set up Branches (where applicable), and **register your users**. We show you how to do this on the next pages.

The form is divided into two sections – **Branch Details** and **Payment Details**.

If the Payment Address is the same as in Branch Details there is no need to complete the second section.

All fields where the label is marked with an ***** **must** be completed. All other fields should be completed where applicable.

Use the drop down option box to indicate if the details being provided are for the **Head Office** address and/or **Billing Address**

Tick this box if **Payment address** are same as **Branch address**
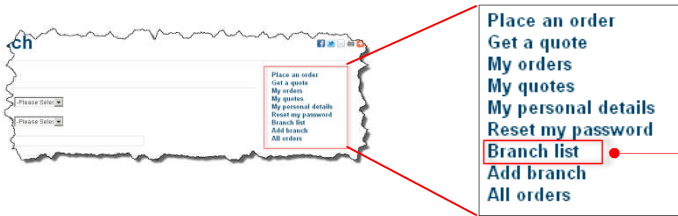
Click on the [Add] button to submit the branch details.
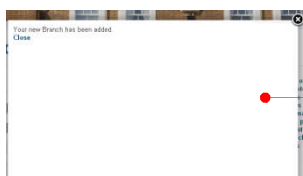
You will receive confirmation that the branch has been added to your account.

Now that the branch has been added to your account, you need now to add details of the users in that Branch.

The steps to be taken to do this are shown on the next page.

User registration

To open the **User registration** page, you must first navigate to the **Branch list**. You can do this by using the navigation pane at the top right corner of most pages. (In this example we have used the Add branch page.)

Click on **Branch list** to open Branch list page
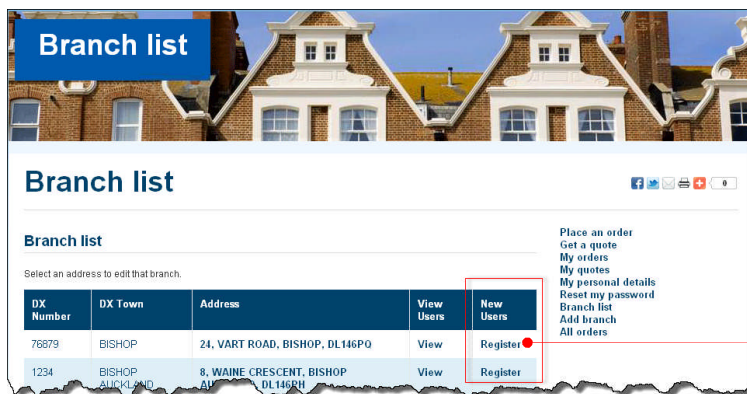
In the **Branch list** you see a list of all the branches registered to your account.
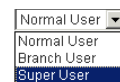
Locate the address of the branch for which you need to register a new user.

In the column headed **New Users**, click on **Register**, _ensuring this is in the same row as the branch address for which the new user is required_.

The **User registration** form opens.

All fields with ***** are required to be completed.

The **User type** field contains three options in the drop down list:

It is important that the correct category is selected. The table below will help you decide which category to apply.

Type in a memorable password and re-type it to confirm. This is the password you will use to log in when your user account is set up.

**Note that the password must be at least eight characters long and contain both alpha and numeric characters**

When form completed click on **Submit**. You will receive confirmation that user has been set up.

| Activity	Type of User		
	Super	Branch	Normal
View / download / proceed own orders and quotes	■	■	■
View / download / proceed own branch orders and quotes	■	■	
Change own details	■	■	■
Change own branch user details	■	■	
Change any branch user details	■		
Deactivate / Reactivate own branch users	■	■	
Deactivate / Reactivate any branch users	■		
Deactivate / reactivate branches	■		
Register new user in own branch	■	■	
Register new users in any branch	■		
Change own password	■	■	■
Change password for any user in own branch	■	■	
Change password for any user	■		
Set up new branches	■		

Update branch details

Access the **Update branch details** form by using the Branch list screen and click on the address of the branch for which the details require updating.

The **Update branch details** form is essentially the same as the **Add branch** form. All of the fields may be amended as required.

The date the branch was originally registered is displayed here.

If there are circumstances where the branch registration needs to be suspended, click on the **Deactivate Branch** option.
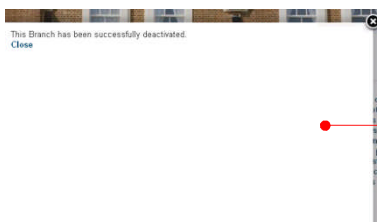
You will receive confirmation that '*this branch has been successfully deactivated*'.

To reactivate the branch open **Update Branch details** page. The **Deactivate branch** option will display as **Reactivate Branch**. Click on this option. You will receive confirmation that the branch has been reactivated.

Branch users

Access the **Branch users** form by using the **Branch list** screen and click on **View** adjacent to the address of the branch for which you wish to see the list of users

Branch users

Select a surname to view details.

First Name	Surname	Telephone	Email
PAUL	JEFFERSON	91323232	SIMON@DJDJD.CONM
S	JEFFERSON	018181818	SIMON@VMVM.COM
TEST	USER	01913015488	TEST.EMAIL@NWL.CO.UK

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Place an order
Get a quote
My orders
My quotes
My personal details
Reset my password
Branch list
Add branch
All orders

View the details of a specific user by clicking on the **bold** text of the name of the person.

The Update branch users screen then opens.

If the users account has previously been de-activated, it can be re-activated from this screen. Conversely, a user's account can be de-activated from this screen if it is currently active.

If a user has transferred from one branch to another, the branch can be changed from this screen.

User Passwords may also be changed on this screen.

Type in a memorable password and re-type it to confirm. This is the password you will use to log in after it has been accepted and confirmed.

Note that the password must be at least eight characters long and contain both alpha and numeric characters

Update branch users

Update branch users

User details

Name:	PAUL JEFFERSON
Telephone:	0191323232
Email:	SIMON@DJDJD.CONM

Re-activate User's Account

Place an order
Get a quote
My orders
My quotes
My personal details
Reset my password
Branch list
Add branch
All orders

Change branch
Branch
24 VART ROAD

Change Branch

Change password
* New Password

* Confirm Password

Reset Password

Back

Confirm the change effected by clicking on the appropriate button.

Reset password

To reset **your own password** click on **Reset my password** on the navigation panel of any page.

First, type in the **existing** password.

Then type in a memorable **new** password and re-type it to confirm. This is the password you will use to log in after it has been accepted and confirmed.

Note that the password must be at least eight characters long and contain both alpha and numeric characters