# 4

# Requirements

All data pertaining to a client's requirements is handled by the requirement section of PRIMO. A requirement record is comprised of three pages:

- Address page: Address, SIC Code, Client Type and Contact sections,
- Data page: Requirement details and matching section,
- Activities page: phone calls, review dates, to-dos, histories, memos, meetings, and any word processor or OLE documents linked to an activity.

The current PRIMO version does not allow the insertion of virtual fields into the Requirement record.

Furthermore, the requirement record toolbar contains an extra icon (), the "offer" icon. For more information on how to create an offer, see Chapter 10, “Offers“.

In this chapter you will learn how to:

- create requirement records based on client requirements,
- match requirement records to properties,
- process matched properties.

# Creating Requirement Records

There are two ways of creating a new requirement record:

- *A:* from within an Organisation record,
- *B:* from the PRIMO Desktop.

*Example A:*

This example assumes you are working with a preexisting organisation record.

If the organisation record does not yet exist, you must create one (cf. section entitled “Creating an Organisation Record“, Chapter 2, “Organisations & Contacts“, page 2-2).

✓ **Prerequisite:**
You have opened or created an organisation record.

1. Go to the requirement page of the organisation record so that you can add a new requirement to that page.
2. Click on the plus icon located above the list.

   If there is only one contact associated with the organisation then that contact will automatically be inserted in the Contact section of the Requirement: Address page. However, when more than one contact is associated with the organisation record, a dialogue box will open with a list of names to choose from:


**Fig. 4-1:** Dialogue Box: Contact

3. Choose the contact that you will be contacting regarding the requirement and click on “OK”.

The contact you have chosen is added to the Contact section of the Requirement: Address page. Double-clicking on the contact in the requirement record will open the organisation record the contact is associated with.

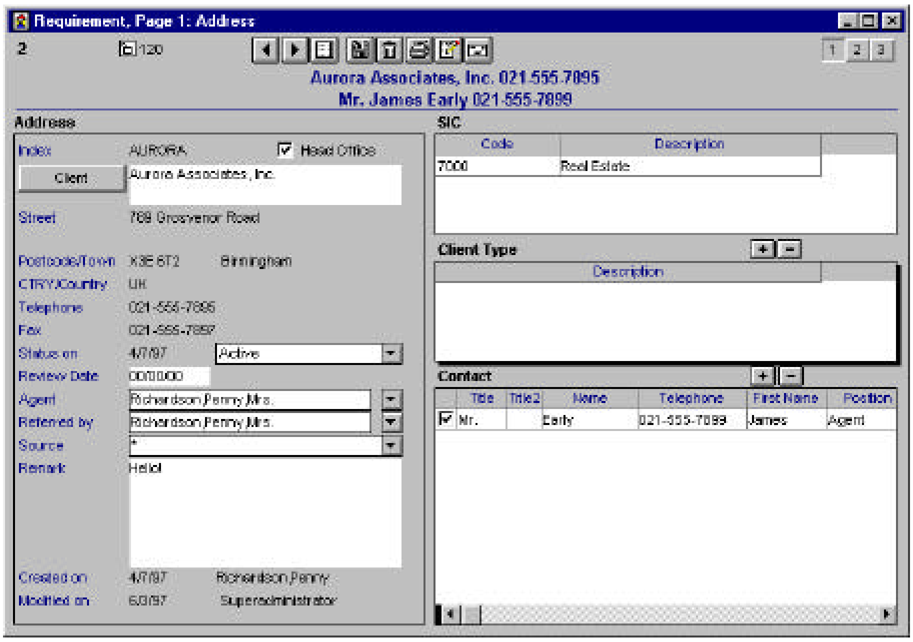


**Fig. 4-2:** Requirement: Address page

*Example B1:*

This example only applies if an organisation record already exists for the client with a new requirement.

1. Open the Data menu, and select "Requirement" from the New sub-menu. A blank requirement record will open.

⚠ **Important:**

If an organisation record is open in the background when you create a new Requirement record through the Data menu, PRIMO will automatically insert the contact from the open organisation record in the new requirement's contact section (e.g. Example A). If you do not want this to happen, close the organisation record. New requirement records are not affected by open Organisation Search and List windows.

An empty requirement record will open to the Address page. The cursor will be blinking in the "Client" field.

2. Click on the “Client” button.

The following search window will open:

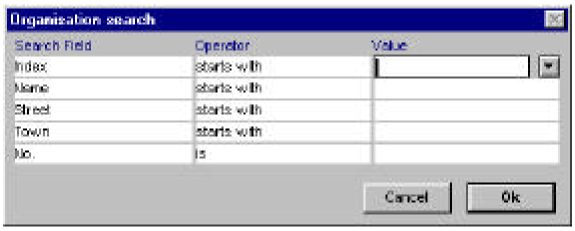


**Fig. 4-3:** “Organisation” Search Window

➔ **Tip:**
When you are in a preexisting requirement record, clicking on the "Client" button will take you to the organisation record linked to the requirement record you are in.

3. Enter the appropriate search criteria and click on "OK".

   If only one record matches the search criteria, the information is automatically entered into the Address page of the requirement record. However, if several records match the search criteria you entered, then the following dialogue box will open:

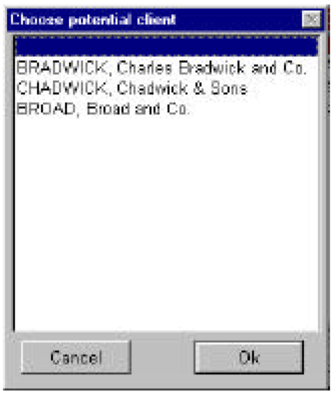


**Fig. 4-4:** Dialogue Box: “Choose potential client”

4. Select the organisation you would like to link the requirement record to and click on “OK”.

   The name of the organisation will appear in the field located to the right of the “Client” button and all necessary data about the organisation will be entered in the requirement record. The organisation and requirement records are now linked.

5. Click on the plus icon located above the contact section of the Requirement: Address page. If there is only one contact associated with the organisation record you have chosen to link to the requirement record, that contact will be entered in the contact section automatically. If more than one contact exists then proceed as described in point number 2 of the Example A.

*Example B2:*

There is second way of creating a requirement record from the PRIMO desktop:

1. Open the Data menu, and select "Requirement" from the New sub-menu. A blank requirement record will open:.

   An empty requirement record will open to the Address page. The cursor will be blinking in the "Client" field.

2. Click on the plus icon located above the Contact section.

   The following search window will open:

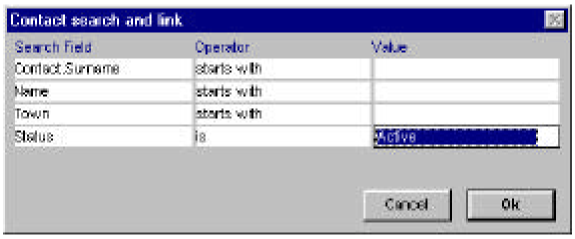


**Fig. 4-5:** “Contact” Search Window

3. Enter the appropriate search criteria and click on "OK".

   If only one contact matches the search criteria, that contact is automatically listed in the Contact section of the Requirement: Address page. However, if several contacts match the search criteria you entered, then the following dialogue box will open:


**Fig. 4-6:** Dialogue Box: “Choose Contact”

4. Select the contact you would like to link to the requirement record and click on “OK”.

   The contact you have chosen will be listed in the Contact section of the Requirement: Address. At the same time the name of the organisation that the contact is associated with will appear in the “Client” field of the Address section and all necessary data about the organisation will be inserted into the requirement record.

   By adding a contact to the requirement record you have linked it to an organisation record.

**Important:**
It is impossible to save a requirement record that is not linked to a contact. If you try to save or close a requirement record without first linking it to a contact, you will get the following message:


**Fig. 4-7:** Message Box: “You must first select a contact”

➔ **Tip:**
All contacts added to a requirement record must be from the same organisation.

In contrast, a property record can be saved without a contact, and contacts added to a property record can come from more than one organisation record.

# Requirement: Address page

The Address page is divided into five sections

- Record header,
- Address section (client address and record information),
- SIC Code section,
- Client Type section,
- Contact section.

## Record Header

Once you have linked an organisation record and contact to your new requirement record, the organisation's name and phone number, as well as the contact's name and phone number will be listed in the record title bar. The record title bar appears at the top of every page of the requirement record.

Note that the requirement record toolbar contains an extra icon (), the "offer" icon, which opens PRIMO's integrated word processor so that you may make an offer for a property on behalf of your client. Writing offers is described in the section entitled “Creating an Offer from the Requirement Record“, Chapter 10, “Offers“, page 10-2.

## Address Section

The address section which is located on the left of the Address page is actually the link between the requirement record and the client’s organisation record. Clicking on the "Client" button will take you to the client's organisation record.

**Address:** The client's address information is taken from the client's organisation record. To modify a client's address, you must go to the organisation record and modify the address there. The requirement record will be updated with the modified address the next time you open it.

**Status on:** Today's date is automatically entered by PRIMO and the status that is selected by default is "Active". You may select another status, but you cannot change the date. The date is updated every time the status is modified.

**Review Date:** Clicking into this field will open the pop-up calendar. Select when you wish to review this record. To enter the date manually, press Esc or click on Cancel to exit the calendar.

**Agent:** The person who created the requirement record is chosen as the default agent. You may select another agent from the drop down list, or you may type in another name.

**Referred by:** The person who created the requirement record is chosen by default as the person who referred the client's requirement. You may select another agent from the drop down list, or you may type in another name.

**Source:** Choose the source of the requirement from the drop down list. The Source field (unlike the Agent and Referred by fields) is not editable, so you may not manually enter a source that is not listed in the drop down list.


**Fig. 4-8:** Source Field Drop Down List

**Remark:** We suggest that you use the Remark field to enter your client's specific requirements. Specific requirements should not be entered in the data fields of the Requirement: Data page, as PRIMO is very precise when matching properties to requirements and this would limit the amount of properties listed in the match list. Furthermore, all remarks entered in the Requirement: Address page are transposed to the Remark field of the Requirement: Data page. You can therefore enter a wider range of criteria in the data fields all the while keeping an eye on your client's specific needs.

## SIC Code Section

The **SIC Code** section is located below the record header to the right of the Address page. The SIC Code section is automatically filled with data taken from the client's organisation record whenever you create a new requirement record (whether you create one from an organisation record or whether you create one from the desktop and have to link it to an organisation record). If you wish to modify a SIC Code, you must go to the client's organisation record and change it there.

➔ **Tip:**
Most information entered in the Address and Contact section of the Requirement: Address page are transposed from the organisation record. Any modifications you

wish to bring to a contact or organisation must be made from within the organisation record. To access the organisation record:

- double-click on a contact listed in the Contact section (or double-click in the empty area beneath the list of names),
- press F2 when you are in the Contact section,
- click on the "Client" button.

## Client Type Section

This section allows you to specify the type of client that has made a requirement. You can have more than one client type per client. To add a client type proceed as follows:

1. Click on the plus icon located above the Client Type section.

   A dialogue box will open giving you a selection of client types pre-defined by your Program Administrator (cf. section entitled “Modifying Item Lists“, Chapter 15, “Administration“, page 15-15) :


**Fig. 4-9:** Dialogue Box: “Choose Client Type”

2. Select the desired client type and click on “Ok”.

To delete a Client Type from the list, select it then click on the minus icon located above the Client Type section.

## Contact Section

This section allows you to add a contact from the organisation record that is linked to the requirement record.

- Click on the plus icon located above the Contact section. If the organisation record only has one contact associated with it, then PRIMO will automatically select it and list it in the Contact section. If, however, the organisation record has more than one contact, you will be asked to select a contact from the following dialogue box:


**Fig. 4-10:** Dialogue Box: “Choose Contact”

You may add more than one contact to the Contact section of the requirement record, but all the contacts must come from the same organisation record.

The first contact listed in the Contact section is automatically checked as the “mail recipient” for this record. That means the contact’s name will automatically appear in the record title on every page of the requirement record, and he/she will also be the person to receive all offers pertaining to this requirement.

Only one “mail recipient” can be checked at a time. If you check a second contact as a mail recipient you will get the following message:


**Fig. 4-11:** Message Box: “You are selecting a new mail recipient...”

Click on “Ok”. A check-mark will now be visible next to the *new* mail recipient. If you did not want to change the mail recipient, then re-check the check-box next to the original mail recipient.

If you wish to remove a contact from the Contact section of the requirement record, click on the “**-**“ icon located above the Contact section. Removing a contact from the Contact section of the requirement record does not delete the contact from the organisation record it belongs to. If you wish to delete a contact, you must do this from within the organisation record. However, contacts linked to property and requirement records cannot be deleted.

⚠ **Important:**
If you remove a contact that was the mail recipient for this requirement record, when you try to close the record you will get the following message:


**Fig. 4-12:** Message box: “One Contact must be chosen...”

## Requirement: Data page

The data page is divided into three sections:

- Record header,
- Requirement Details section (Department fields, Type/Area box, Region box, Move-in/Remark box, Criteria box)
- Matching section.

The record header contains the toolbar and the title bar; the details section contains the client's requirements (surface type, dates, offer prices and other criteria) for information and matching purposes; and the matching section is where all properties that match the requirement are listed for further processing.

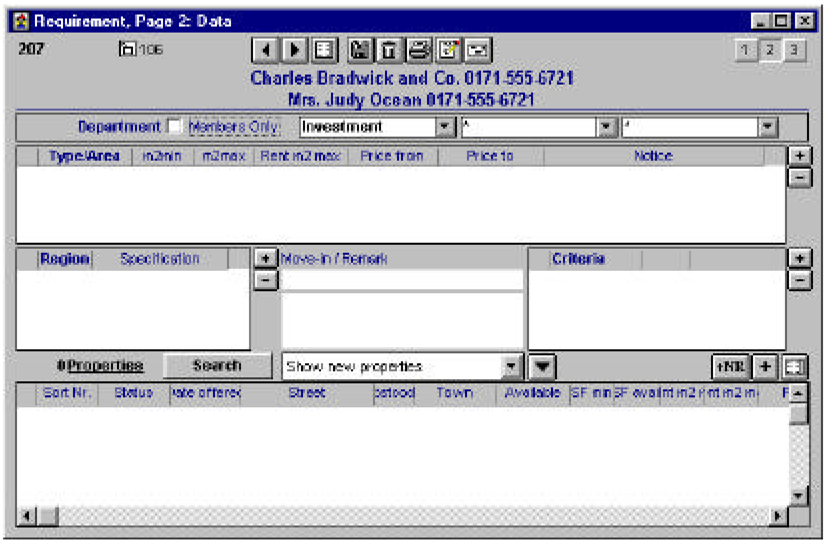


**Fig. 4-13:** Requirement: Data page

### Requirement Details Section

The record header is discussed in detail in the section entitled “Record Headers“, Chapter 1, “Basic Functions“, page 1-12.

If your Program Administrator has divided PRIMO users into departments (section entitled “User Rights“, Chapter 15, “Administration“, page 15-25), then at the time you create a requirement record, your department will automatically be listed in the first of three “Department” fields located in the Details section of the Requirement: Data page. The additional two “Department” fields allow you, the user, to enable other departments to view the record. If you do not want other departments to view a record you have created, you must activate the "Members Only" check-box located next to the three department fields. Activating the "Members Only" option will make the requirement record invisible to all users from other departments. They will not be able to search for the record, match it to properties, or see it listed on the requirement page of an organisation record. (The only exception is when the requirement is linked to an activity. The requirement link will be visible, but the record will not be accessible.)

The "Members Only" option can only be activated if the first department field is filled in and the other department fields are left blank. The selected department cannot be changed while the "Members Only" option is activated. To change the department, a user from that department must deactivate the "Members Only" option. Once this has been done, you may change the department the property record is assigned to. If you wish to reactivate the "Members Only" option, you can do so once the department has been changed.

⚠ **Important:**
Administrators and users not assigned to a department have access to all requirement records.

## Requirement Details Section: Type/Area Box

Enter your client's surface requests in the Type/Area box as follows:

1. Click on the plus icon located to the right of the Type/Area box and wait for a new line to appear in the box. Go through the fields of the new line using the Tab key.
2. Select the surface type from the drop down list in the Type/Area field.


**Fig. 4-14:** “Type/Area” Drop Down List

3. Enter the minimum and maximum surface required in the appropriate fields.
4. Enter the maximum rent the client is willing to pay in the “Rent $m^2$ max.” field, and enter the minimum and maximum purchase price the client is willing to pay in the “Price from” and “Price to” fields.

⚠ **Important:**
If the purchase price entered in the “Price from” field is bigger than the purchase price entered in the “Price to” field, PRIMO will reject the entry.

➔ **Tip:**
When matching requirements to properties, PRIMO takes the surface, rent and sale price information from the Type/Area box. Be aware that PRIMO processes minimum and maximum amounts very precisely when matching requirements to properties. Therefore, if you enter the lowest value and not the highest in the Type/Area box, you are limiting the number of properties that might fit the requirement. (E.g. if a client is willing to pay £19/m$^2$ for a property and there is a property that matches the client's requirements but the property owner is asking £20/m$^2$ for his property, the property will never appear in the match list if you entered £19/m$^2$ in the Type/Area rent field).

5. You may enter a short remark of up to 80 characters in the “Notice” field.

Each time you add a new line to the Type/Area box, that line is automatically check-marked as a line to be used by PRIMO when it matches requirements to properties. If you wish PRIMO to disregard a line in the Type/Area box when it matches the requirement to properties, deactivate the check-box located at the front of the line.

For each new surface type you wish to add to the Type/Area box, click on the “**+**” icon to the left of the box and follow steps 1 through 5 as described above.

To delete a line from the Type/Area box, select it and click on the “**-**” icon located to the right of the box. Before you delete a line, however, we recommend that you read the section entitled “Deactivating Search Criteria in the Type/Area and Region Boxes“ in this chapter, page 4-20.

## Requirement Details Section: Region Box

Joker symbols and drop down lists are often used once you are in the Region box. For more information on how to use joker symbols and drop down lists see the section entitled “Searching Using the Joker Symbol“, Chapter 1, “Basic Functions“, page 1-32 and the section entitled “Drop Down Lists“, Chapter 1, “Basic Functions“, page 1-17.

To add a line to the Region box, click on the plus icon located to the right of the box. You may now tab through the fields using the Tab key or the mouse. (Now that you have added a line to the Region box, you may Tab from the Department fields through the Area/Type box fields and the Region box fields). PRIMO will use information entered in this box when matching properties to the requirement record.

Open the drop down list in the "Region" field and select the region that best fits the requirement (e.g. Postcode, Town or Street). Once you have selected a region, Tab into the Specification field. The Specification field lets you define the region you have selected, and depending on the type of Region you have chosen, you will either have to select a specification from a drop down list or you will have to enter the specification manually (using jokers if necessary).

For example, if you select “List” or “Attributes” from the Region field, when you Tab into the Specification field you will have to choose a specification from a drop down list.

To learn how to create or modify drop down lists see the section entitled “Modifying Item Lists“, Chapter 15, “Administration“, page 15-15.

The following region searches are available:

**Postcode:** When entering information in the Specification field, use the joker symbol (%) to help you search for regions by postcode. Remember that the less information you give and the more jokers you use the broader the search will be.

**Town:** Enter the town name in the Specification field. To compensate for misspelled or inconsistent data entry, you should consider using the partial town name followed by a joker symbol. For example, if entries for Stratford upon Avon vary between "Stratford" and "Stratford/Avon", you should enter the word "Stratford" followed by the joker symbol in the Specification field.

**Street:** Enter the street name in the Specification field. The spelling of street names is frequently inconsistent. In addition, a street should be searched for independently from the building/house number. Entering “%Som%R%” in the Specification field will request a search for all records with the street name “Somersville Road”, even if the street was entered as “Sommersville Rd.“ in one of the records. PRIMO is not case sensitive when searching for street names.

**Attributes:** Select a property Attribute from the drop down list in the Specification field (e.g. 15 minutes from train station, Business district...).

**List:** Select a region from the drop down list in the Specification field. The list of regions (e.g. counties, districts and suburbs) is set up by the Program Administrator. For information on how to create and/or modify Region Lists see section entitled “Region Lists“, Chapter 15, “Administration“, page 15-11.

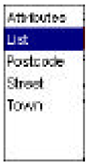


**Fig. 4-15:** “Region” Drop Down List

If a certain region type is missing from the Region drop down list it may be that your Program Administrator has not made it available to you (cf. section entitled “Requirement-Region 0...5“, Chapter 15, “Administration“, page 15-3). However, you can override the Program Administrator's settings by pressing the Ctrl. key and the "**+**" icon when you add a new line to the Region box. The new line will list all the region types in the Region drop down list.

Each time you add a new line to the Region box it is automatically check-marked as a line to be used by PRIMO when it matches the requirement to properties. If you wish PRIMO to disregard a line in the Region box when it matches the requirement to properties, deactivate the check-box located at the front of the line.

To delete a line in the Region box, select it and click on the minus icon located to the right of the box.

## Requirement Details Section: Move-in / Remark Box

In the first field of the Move-in/Remark box, enter the date (using numbers or letters) the client would like to move into the property. Any information entered in the Remark field on the Address page of the requirement record will automatically be copied into the Remark field of the Move-in/Remark box. You may add to or modify any information already entered in the field. If you have followed our suggestion of not entering the client's exact requirements into the Type/Area and have entered them instead in the Remark field, when you search for properties that match the requirement, you will be able to compare the properties listed in the match list with the information entered in Type/Area box and the Move-in/Remark box. This will allow you to find the most appropriate match for the requirement.

PRIMO does not use information entered in the Move-in/Remark box when matching requirements to properties.

### Requirement Details Section: Criteria Box

This capability is not available in this version of PRIMO.

## Examples of Requirement Records

A few requirement record examples follow with, in each case, an illustration of the Address and Data pages. The examples given describe the client's specific requirements. You, as the agent, should convert the client's requirements into information that can be used for matching purposes. For example, if your client is looking to rent property with a maximum rental rate of £55/m$^2$, he/she might be willing to pay £57/m$^2$ if the property meets all his/her requirements.

*Example 1: Request for Office Space*

The Stewart, Jones and Barnaby Law Firm wishes to relocate. The firm is searching for bright and newly-renovated space in an older building within the business district. They need 650m$^2$ of office space and rent should not amount to more than £55/m$^2$. They require a minimum of four parking spots. The offices should be located close to a main road.

Conversion of data at agent's discretion:

| Characteristics | Requirements | Conversion |
|---|---|---|
| Surface | 650 m$^2$ | 600 to 750m$^2$ |
| Max rent/m$^2$ | £55.00 | £57.00 |
| Region | Business District | Attribute: Business District |

The client's specific requirements have been entered in the Remark field.

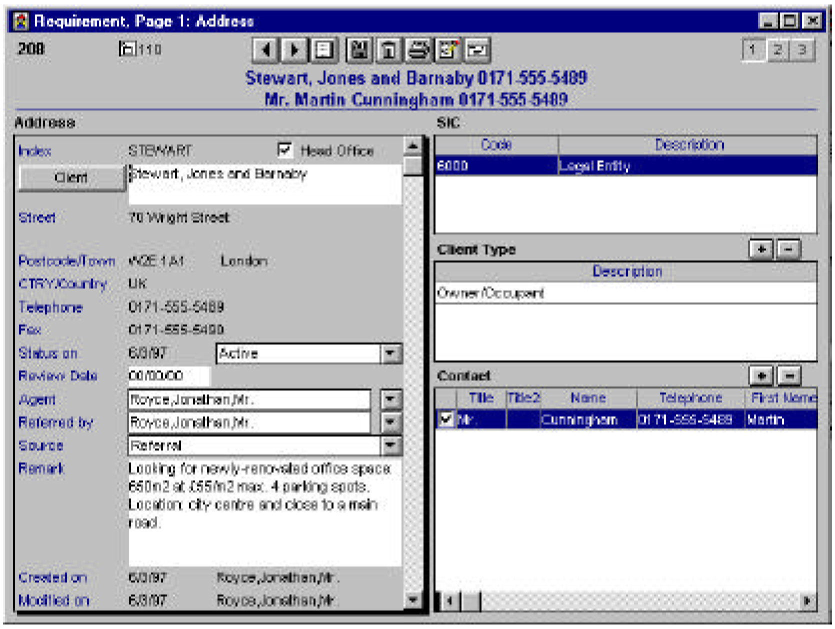


**Fig. 4-16:** *Example 1:* Requirement: Address page, Office Space

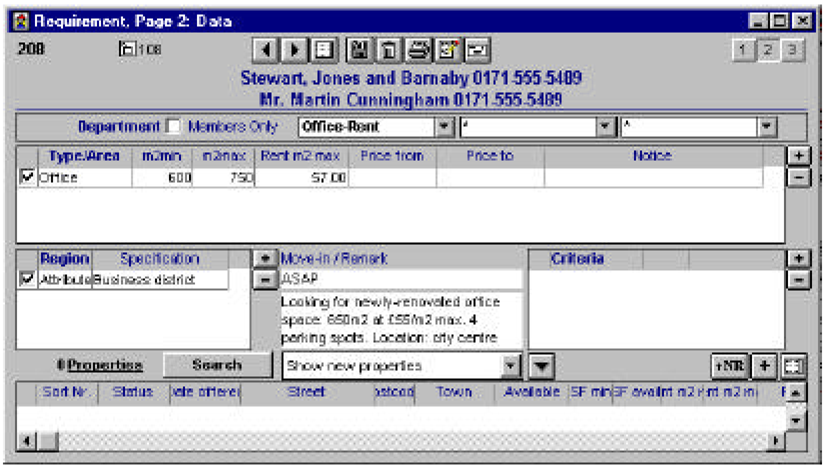


**Fig. 4-17:** *Example 1:* Requirement: Data page, Office Space

*Example 2: Request for a Residence or Flat*

Mr. Donaghy is looking for a beautiful single-family home or a flat in a good suburb of Birmingham. The living area for both the house and the flat should be approximately 120m$^2$ in size. The single-family home should not cost more than £1.2 million and the flat should not cost more than £800 000. The house should have a garden and the flat should have access to a garden and have at least one balcony. Shopping facilities and schools must be close by since Mrs. Donaghy does not drive.

Conversion of data at agent's discretion:

| Characteristics | Requirements | Conversion |
|---|---|---|
| Surface Type | Residence | Residence |
| Surface | from 120m$^2$ | 150 to 250m$^2$ |
| Max. purchase price | £1.2 Million | £1.3 Million |
| Region | Good suburb | Postcode: X3E% |

and

| Characteristics | Requirements | Conversion |
|---|---|---|
| Surface Type | Flat | Flat |
| Surface | from 120m$^2$ | 150 to 250m$^2$ |
| Max. purchase price | £800 000 | £850 000 |
| Region | Good suburb | Postcode: X3E% |

The client's specific requirements have been entered in the Remark field.

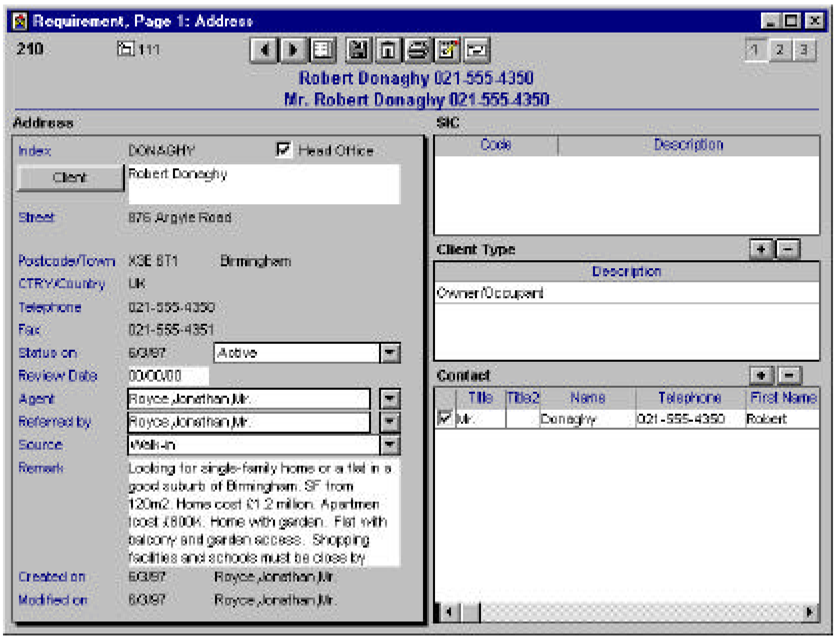


**Fig. 4-18:** *Example 2:* Requirement: Address page, Residence/Flat

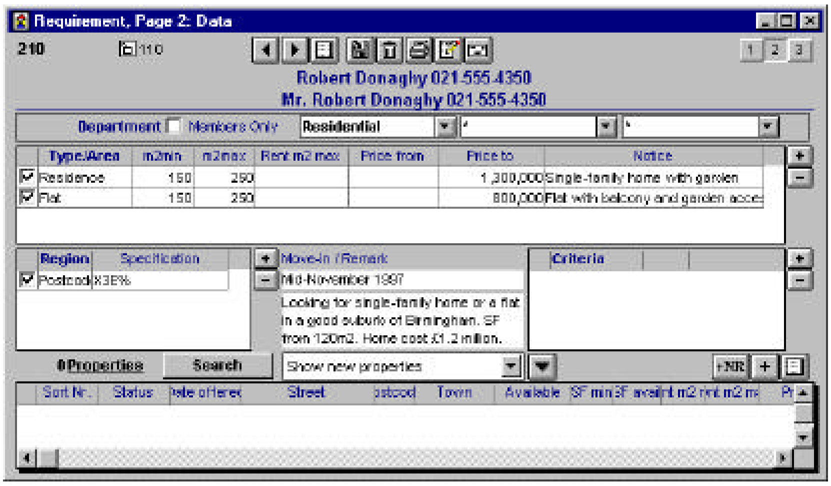


**Fig. 4-19:** *Example 2:* Requirement: Data page, Residence/Flat

*Example 3: Request for Mixed Surface*

The Dependable Cargo Co., a large cargo firm, is looking for approximately 500m$^2$ in office space at £28.00/m$^2$ and approximately 1300m$^2$ in warehousing space with a rent price of up to £12.00/m$^2$. The available space must be located near the port of Dover. The warehouse space must be equipped with loading docks. The warehouse can be located in a separate building from the office space.

Conversion of data at agent's discretion:

| Characteristics | Requirements | Conversion |
|---|---|---|
| Surface Type | Office space | Office space |
| Surface | approx. 500m$^2$ | 400 to 650m$^2$ |
| Max. Rent/m$^2$ | £28.00 | £30.00 |
| Region | Dover-Port | Postcode: T4E% |

and

| Characteristics | Requirements | Conversion |
|---|---|---|
| Surface Type | Warehouse | Warehouse |
| Surface | approx. 1300m$^2$ | 1100 to 1500m$^2$ |
| Max. Rent/m$^2$ | £12.00 | £14.00 |
| Region | Dover-Port | Postcode: T4E% |

The client's specific requirements have been entered in the Remark field.

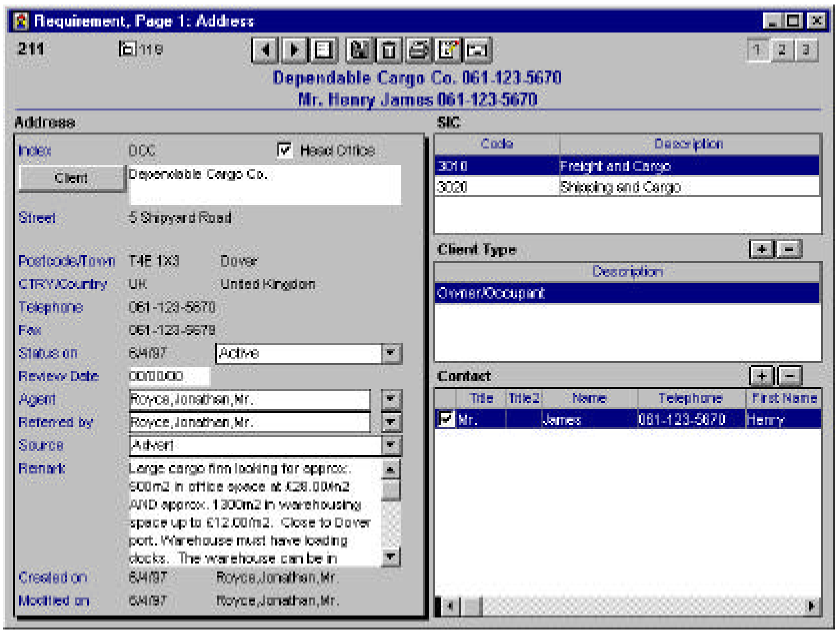

**Fig. 4-20:** *Example 3:* Requirement: Address page, Mixed Surface

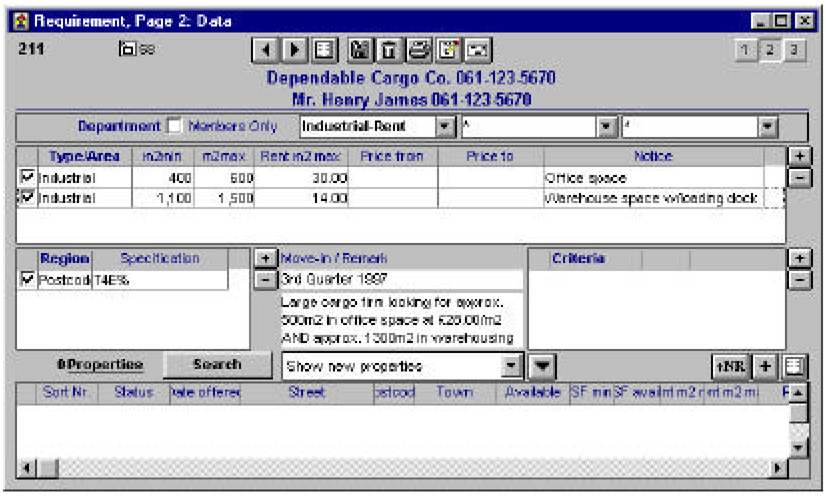

**Fig. 4-21:** *Example 3:* Requirement: Data page, Mixed Surface

*Example 4: Request for Investment Property*

Central Investment Funds is looking for a real estate investment opportunity worth £15 million with a yield of 6%. The firm invests mostly in residential buildings, holiday resorts and time-shares in the south east. Their most important criteria when looking at property is the yield.

Conversion of data at agent's discretion:

| Characteristics | Requirements | Conversion |
|---|---|---|
| Surface Type | Residential Building | Residential Building |
| Purchase Price | min. £15 Million | £10 to 50 Million |
| Region | South East | South East |

and

| Characteristics | Requirements | Conversion |
|---|---|---|
| Surface Type | Holiday Resort | Resorts |
| Purchase Price | min. £15 Million | £10 to 50 Million |
| Region | South East | South East |

and

| Characteristics | Requirements | Conversion |
|---|---|---|
| Surface Type | Time-Share | Time-Share |
| Purchase Price | min. £15 Million | £10 to 50 Million |
| Region | South East | South East |

Since surface is inconsequential in the firm's decision-making, the surface fields remain empty.

The client's specific requirements have been entered in the Remark field.

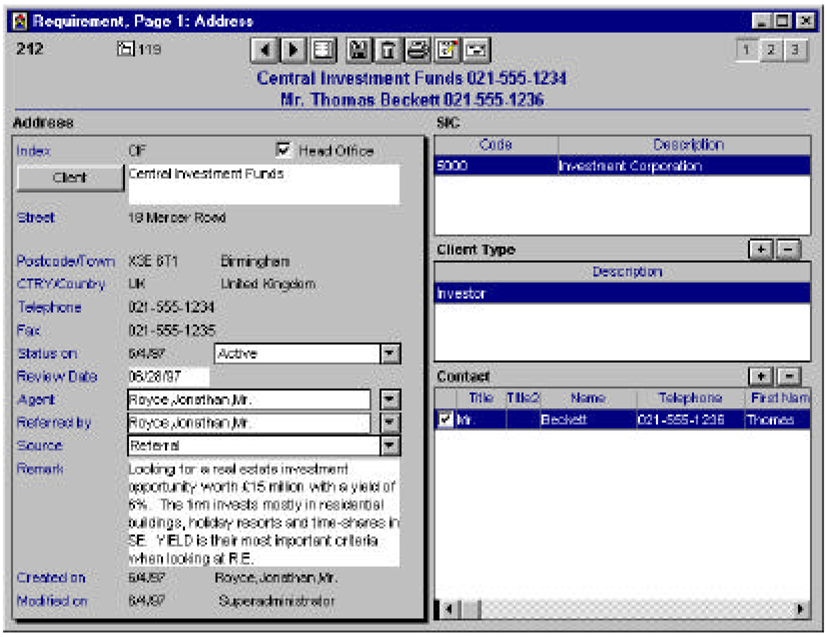


**Fig. 4-22:** *Example 4:* Requirement: Address page, Investment Property

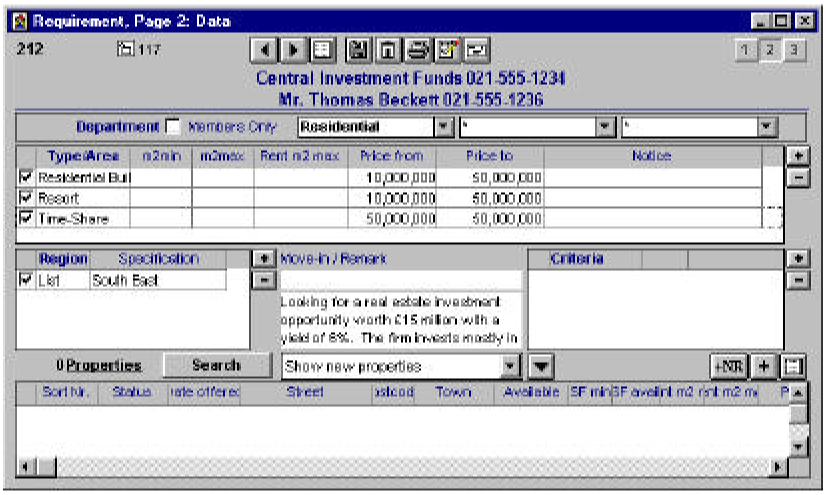

**Fig. 4-23:** *Example 4:* Requirement: Data page, Investment Property

## Matching Section

➔ **Tip:**
There is a quick and simple way to look for properties by region without using the matching capabilities of a requirement record. This is especially useful when you have a client on the phone waiting for the information. To learn a quick way of searching for properties by region see the section entitled “Property-Regions Find and List Window“, Chapter 6, “Lists“, page 6-21.

The third section of the Requirement: Data page is the Matching section. This section allows you to:

- search for properties that best match the client’s requirements,
- add to and display properties from a previous match,
- add specific non-matched properties to the list,
- assess the offer suitability of the listed properties,
- select properties to be offered.

⚠ **Important:**
When matching properties to a requirement record, PRIMO will only consider property records with an “Active” status.

### Deactivating Search Criteria in the Type/Area and Region Boxes

If you do not wish to have certain criteria you have entered in the Type/Area and Region boxes to be used by PRIMO for matching purposes, deactivate the check-box next to the row of criteria you would like PRIMO to disregard. To reactivate the row of criteria, simply click in the check-box at the beginning of the row. You should only delete a row of criteria from these boxes if they are no longer applicable.

## Searching for Matching Properties

1. Click on the "Search" button located above the match list.
2. Do not change the default selection "Show new properties" in the drop down list located to the right of the Search button.

   PRIMO will now search for all properties that match the checked-marked criteria entered in the Type/Area and Region boxes.

➔ **Tip:**
Only information entered in the Department fields, Type/Area and Region boxes are used by PRIMO when matching requirements to properties. Information entered in the Move-in/Remark box is not taken into consideration.

All properties that match the check-marked criteria entered in the Details section of the Requirement: Data page are listed in the Matching section.


**Fig. 4-24:** Matching Section: List of Matched Properties

The Matching section displays the following information about the properties that match the client's requirements: offer status, date offered, street address, postcode, town, date available, minimum surface, surface available, minimum and maximum rent/m$^2$, sale price, region and yield.

## Filtering Matched Properties

You can customise the display of properties in the match list by using one of the filters listed below. When using filters, the properties filtered out remain hidden in the background. They are not deleted and you may view them again by changing filters.

✓ **Prerequisite:**
You are on the Data page of a requirement record and have found properties that match the client's requirements.

1. Select one of the following filters:

   **"Show new properties"** lists all properties with the offer status "New".

   **"Show all properties"** lists all properties, regardless of their offer status.

   **"Show properties to offer"** lists only those properties that you have check-marked as properties you wish to offer (cf. section entitled “Property Suitability“ in this chapter, page 4-24).

   **"Show offered properties"** lists all the properties that have been offered.

   **"Show reserved properties"** lists all properties that you may wish to offer at a later date.

   **"Hide uninteresting properties"** hides all properties except those you have an interest in offering, or have already offered. This option gives you a more accurate list of the properties that best match the requirement in question (cf.section entitled “Property Suitability“ in this chapter, page 4-24).

2. The match list will now list the matched properties based on the filter you have chosen.

### Sorting and Configuring the Match List

By default, the properties listed in the match list are sorted by their street address. You may change the sorting order as follows:

- choose the column title you wish to see the listed sorted by and click or double-click on the title to sort the list in ascending or descending order,
- assign a sort number to each line in the list and click or double-click on the “Sort Nr.” column title to numerically sort the list in ascending or descending order.

➔ **Tip:**
Some properties may meet more than one criteria entered in the Region box of the Requirement: Data page. However, the Region field in the match list will only list the first criteria matched by a property. To see if the property matched more than one criteria entered in the Region box, you must open the Property record and go to the Data page of that record.

The date in the field "Date offered" is automatically entered by PRIMO when an offer is made. The offer date cannot be changed manually.

You can add or remove columns from a list, you can move them within the list and finally, you can even change a column's width.

The list of matched properties can be transferred into a Property Search and List window by clicking on the list icon located above the match list to the far right.

These commands are described in section entitled “Working with Lists“, Chapter 6, “Lists“, page 6-5. Take special note of the chapter explaining the sorting possibilities of match lists (cf. section entitled “Working with Match Lists“, Chapter 6, “Lists“, page 6-13).

### Adding Non-Matched Properties to the Match List

Before a requirement can be offered, that requirement must first be matched to one or more properties. Usually clicking on the "Search" button will list any property that matches a client’s requirements. However, there may be a property that you feel should be in the match list, even if it does not exactly fit the client’s requirements.

There are two ways of adding a requirement to a match list:

- *Example A:* by searching for a property using a Property Search and List window,
- *Example B:* by entering the reference number of the property record you wish to add.

⚠ **Important:**
Properties that you manually add to a match list are automatically given the offer status "New" and are checked-marked as properties you wish to offer. You will **not** be warned if one of the properties you have added to the match list is not under contract.

*Example A:*

1. Click on the “**+**” icon located above the match list.

   A Property Search and List window will open. This is the same window that opens when you search for a property using the Data menu.

2. Search for the properties that you would like to add to the Requirement: Data page Matching section (cf. section entitled “Extending and Reducing Lists“, Chapter 6, “Lists“, page 6-11).

3. Once you have a list of properties, select the properties that you would like to add to the Requirement: Data page Matching section.

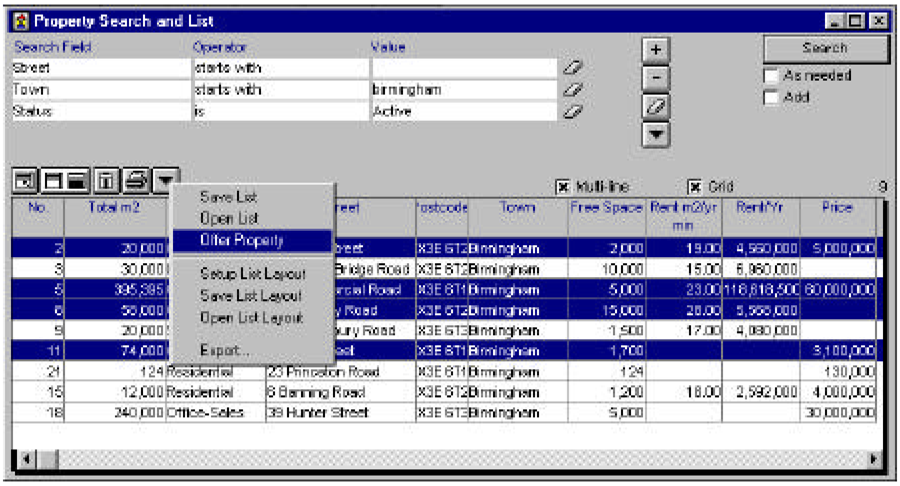


**Fig. 4-25:** List of Properties to Add to Requirement: Data page

4. Click on the down arrow in the list toolbar in the Search and List window and select the command "Offer Property".

   The Property Search and List window will automatically close itself and you will see that the records you selected have been inserted into the Matching section of the Requirement: Data page. The default offer status for newly added records is "New".

   If one of the properties you wish to add to the Matching section is already in the match list, you will get the following message:


**Fig. 4-26:** Message Box: “This property is already in the list”

5. Click on “OK”.

   The property you have selected is not added to the match list and the Property Search and List window remains open so that you may perform another search.

*Example B:*

1. Click on the “**+NR**” icon located above the match list.

   A dialogue box will open:

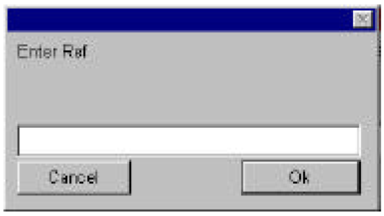


**Fig. 4-27:** Dialogue Box: “Enter Ref.”

2. Enter the reference number of the property record you wish to add to the match list and click on “OK”.

   The property record is added to the list and the dialogue box immediately re-opens.

   If you wish to add another property record to the list, enter the reference number, otherwise close the dialogue box by clicking on "Cancel". All newly added properties are automatically given the offer status "New".

## Property Suitability

Before you offer a property, you may want to make sure that it suits the client’s requirements. You may, therefore, wish to open the property record to view it in more detail.

1. Open the property record by selecting it from the match list and double-clicking on it or pressing F2.
2. Go through the property record to confirm your decision to offer it.

➔ **Tip:**
You can transfer properties listed in a match list to a Property Search and List window. To do this, click on the list icon above the match list. Once you have transposed the match list into the Property Search and List window, you can manipulate the list, print it and even export it if your Program Administrator has given you authority to do so (cf. section entitled “Working with Lists“, Chapter 6, “Lists“, page 6-5).

You have four possibilities when assigning an offer status to a property record in a match list:

**"New"** for properties that are current, recently added and have not yet been offered.

**"Uninteresting"** describes a property that may match the client’s requirements, but is not a suitable proposition.

**"Reserve"** puts a property on hold until you are ready to offer it to a client.

**"Offered on"** is automatically selected by PRIMO once you have made an offer. This status cannot be manually altered.

3. To select an offer status, click in the “Status” field of the match list.

   A drop down list will open listing all four statuses. Choose one of the first three.

Once you have modified the status of the properties in the match list, update the Matching section as follows:

1. Select "Show new properties" from the drop down list located above the match list and click on the "Search" button.

   The list will now show only those records with the offer status "New".

2. Activate the check-box of all the properties you wish to offer.

⚠ **Important:**
If a property record listed in the match list is not under contract and you wish to offer it, (cf. section entitled “Entering Data in Property: Address page“ in this chapter, page 3-6), you will get the following warning:


**Fig. 4-28:** Dialogue Box: “The following property is not under contract”

“The following property is not under contract.... Offer it anyway?“ If you answer "No", the property will not be offered, if you answer "Yes" the check-box will be activated and the property will be offered.

You may now write an offer to your client. Click on the "envelope" icon that is added to the record toolbar of all requirement and property records. For more information on how to create an offer, see Chapter 10, “Offers“.

## Requirement: Activities page

The last page of the Requirement record lists all activities linked to this record, such as phone calls, meetings, to-dos, histories, memos, letters, OLE documents, etc.

From here you can open any linked activity record, and can even add an activity record to the Requirement record. For more information regarding creating activity records see Chapter 5, “Activities“.

You can sort the activities listed on the Activities page of the Requirement record. For an explanation on how to sort lists, see the section entitled “Sorting Lists“, Chapter 6, “Lists“, page 6-12. Furthermore, several filters are available to reduce the list of activities to those you are interested in. For example, you can reduce the list of activities to show only those activities of the type "History". This particular example demonstrates how you could keep track of the properties you offered to a certain client.

The Activities page is always located on the last page of a record (Organisation, Property and Requirement), and works the same way for all records. The only difference being the choice of filters from one type of record to another. For a more detailed explanation of the Activities page, see the section entitled “The Activities page for Organisation, Property and Requirement Records“, Chapter 5, “Activities“, page 5-2.