**Training Syllabus**

**Alto Foundation**

**(*This is a guide only to what will be covered, content may vary dependant on your needs)***

**Introduction and Home Screen**

Knowledge Centre  
Main Dashboard  
PM Dashboard  
Tasks  
Movement Book  
Property Map  
Charts  
Communication by email and SMS  
Portal Enquiries  
Email Marketing  
  
**Contacts**

Adding clients, applicants and third parties  
Matching an applicant  
Applicant management  
Groups  
  
**Diary**

Booking and changing appointments  
Creating different diary views  
Printing diary  
Export  
  
**Viewings**

Booking and confirming viewings  
Following up after viewing  
Relay feedback to vendor/landlord  
  
**Offers**

Making and revising offer  
Rejecting and accepting offer  
Creating memorandum of sales  
Creating tenancy documents  
  
**Sales Progression**

Progression tasks  
Chain Creation  
Renegotiate and withdraw  
Exchange and Completion

**Letting Progression**

Progression tasks  
Creating AST and other documents  
Set up of tenancy  
Finalising tenancy  
  
**Market Appraisals**

Adding market appraisal  
Following up   
Instructing  
Not instructed  
  
**Properties**

Add marketing details  
Adding keys  
Creating brochures and window cards   
Groups  
  
**Property Match**  
Matching to registered applicants  
Filter applicant match by group  
Create match group  
  
**Letters**

Creating, emailing and printing  
Amending letters templates  
Adding new templates  
  
**Tools**System administration  
Company and branch settings   
Standard paragraphs