**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