

## Offr

## The Agent Guide

### Table of Contents

### Click to jump to any section.

Creating an Account	
Signing Up ·····	5
Confirming Email Address	6
Account Setup ·····	6
Customizing your Account ·····	6
Connecting with Stripe	. 7
Adding the Offr Button to your website	
Customizing your button	10
Embedding your button on your website	10
Adding the Offr Button to a Property	
Adding your first property	
Adding property images / documents:	
Setting up External Link	13
Adding the Terms of Sale	
Private Treaty ·····	15
Auction	17
Inviting & Approving Bidders	
Sending Property Invite	
Inviting Bidders ·····	
Approving Bidders ·····	21
Accepting / Rejecting Docs	. 21
Inviting Seller & Solicitor	
Inviting from Dashboard ·····	. 23
The PSA	
Creating PSA ·····	25
Sending PSA	. 26

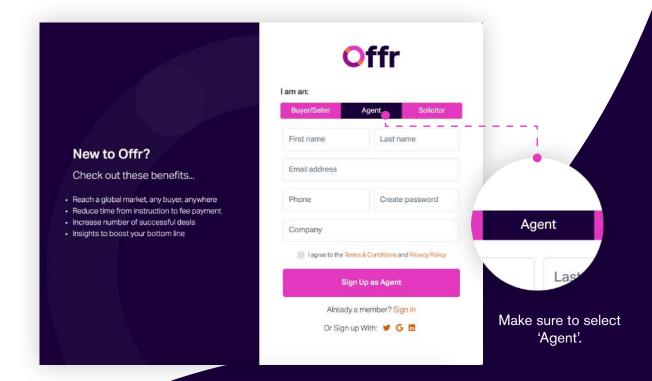
The Private Treaty Process	
Reviewing Offers	28
Accepting an Offer ·····	29
Sales Advice Note · · · · · · · · · · · · · · · · · · ·	30
Contract Exchange	30
The Auction Process	
Watching the Auction ·····	33
· · · · · · · · · · · · · · · · · · ·	34
Reviewing Contract / Memorandum Of Sale · · · · · · · · · · · · · · · · · · ·	35
Signing & Witnessing Contract	36
Downloading Contract	37

## Creating an Account

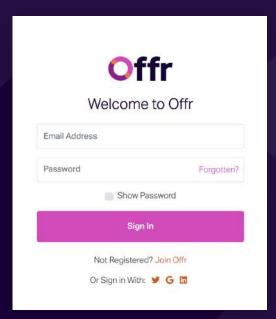


### O Sign up for an Account

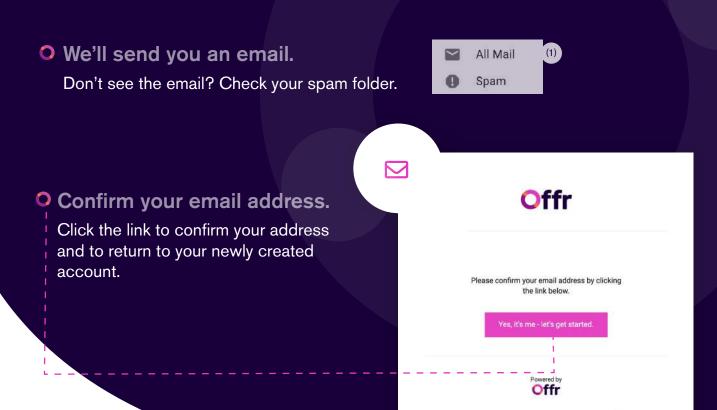
It only takes a few minutes!



Already have an account?Click "Sign In".

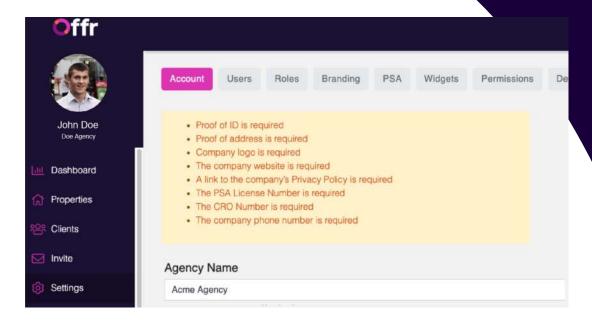


If you have any questions you can contact us at support@offr.io



### Set Up Your Account

Navigate to the "Settings" tab of your newly created profile.



### O Fill in the fields

You can save your details at any stage however your account won't be validated until all mandatory details have been inputted.

### Connecting with Stripe

Why connect with Stripe?

#### **Marketing Fees**

Marketing fees: Vendor's can pay their marketing fees directly into your account.

#### **Private Treaty**

Buyers can pay their deposits.

#### **Auction**

Stripe can preauth the payments for registration so you don't have to. The funds will be automatically released to the Bidders once the Auction closes.



### Setup Stripe Connect

You will now be brought to Stripe.com where you will be asked to allow Offr to act on your behalf on your Stripe account. You may not accept payments via Offr unless this step is completed successfully.

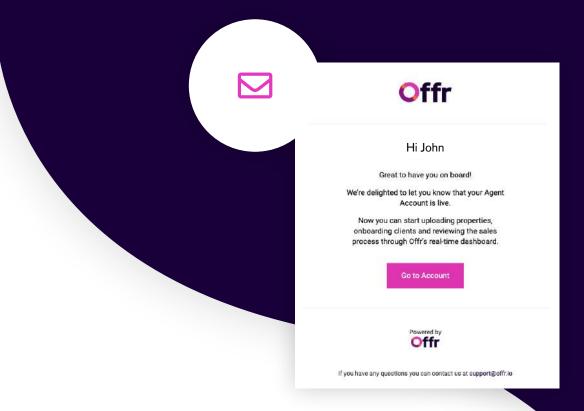


Set up your bank details in Stripe to facilitate payments



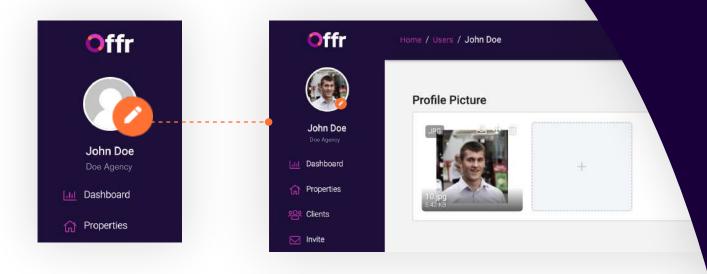
We will email you once your account has been activated.

Now you're all set up.



### O Personalise Your Account

You can personalise your account by adding a profile image.



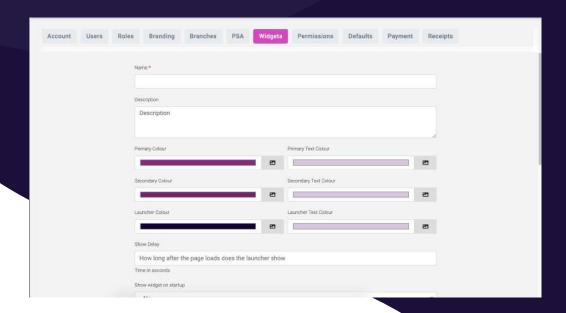
## **Adding the Offr Button**

to your website.



### Set Up Your Offr Button

In settings you can now set the style of the Offr Button. Go to the Widget tab to adjust the colours and placement.



### Customise you Offr Button.

Stylize the Offr panel to showcase your brands colours. Click save to continue,





## <!-- Begin Offr Snippet --> <script src="https://staging.theoffr.com/js/widget/offr\_widget.js" id="offr-widget" datawidget="586cafb7cebf36754e9180f9869b10c7"></script> <!-- End Offr Snippet -->

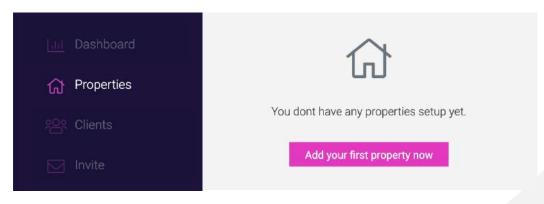
### Embed the Offr Button

Follow the link after the customization is complete. A snippet of code will be ready to insert in your own websites HTML. This can be done by your web developer. Follow the detailed instructions provided on the website.

# Adding the Offr Button to a property.

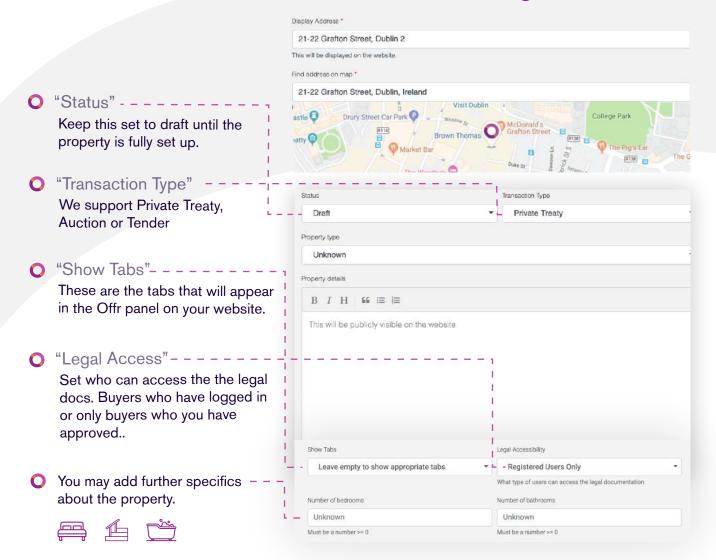


### Add your first property.





Enter The Address



### Step 2:

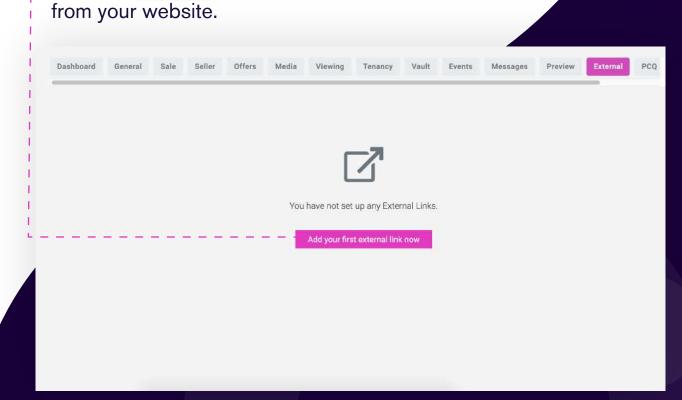
Add a property image

Go to the Media tab of your property and upload an image directly from your computer.

(i) If you have a brochure for the property you can upload it to this document section. Any uploaded documents will appear at on the Offr panel on your website for your customer.

### Step 3:

Set Up an External Link
Click the External tab to add the property URL



Add the property URL from your website.

Url

http://www.property.com/your-property-listing

The full url of the external website hosting this property (please note the embed code must be installed on this site also for this to work)

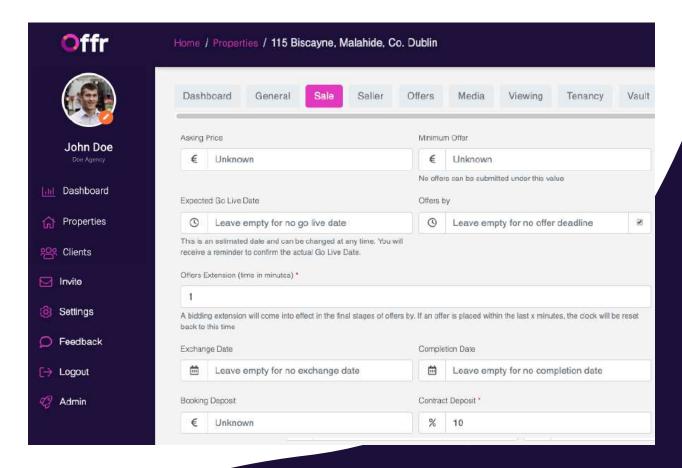
## **Adding Terms of Sale**

Private Treaty, Auction or Tender



### **Private Treaty**

In the Sales tab of your property, you can add the terms of sale.



### Set Asking Price

This is the Guide price and will appear to customers

### Set Minimum Offer

No offers can be submitted under this value

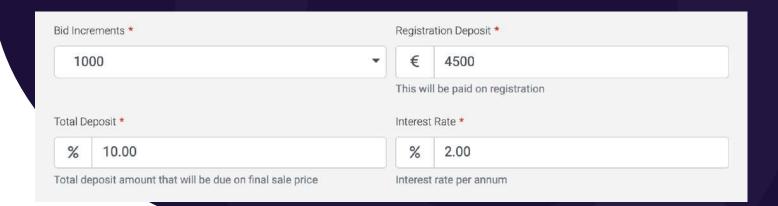
### O Determine Deadline

Set when you expect to accept offers and determine when the deadline is.

### • Exchange & Completion Date

These are good parameters to set if you want to keep all parties focussed. You can set these at any stage.

### Determine the booking deposit amount

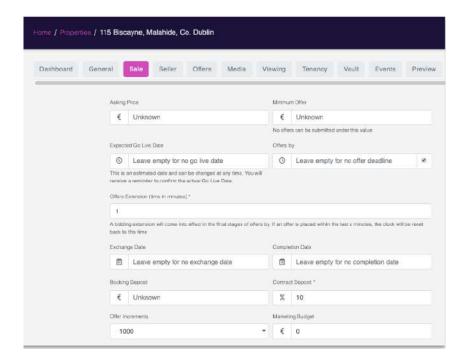


- O Add the contract deposit
- O Apply your marketing budget.
- O Pre-approval:

Do you want to approve all of the buyers first? \*Note you will only have to do this once.

Do you require Proof of Address before a buyer can place an offer?

Do you require Proof of Funds before a buyer can place an offer?



### **Auction**

### O Auction Start & End

Set the Auction Start and End time This will be displayed at the top of the Offr Panel on your website.

### O Deposit Due Date

Set when the balance of the 10% deposit is due. This should be two business days post Auction.

### **Completion Date**

This is the completion date as per the Contract for Sale uploaded by the Solicitor.

### O Bidding Extension

If a bid is placed within the last 60 secondsthe clock will reset allowing a further x minutes of bidding

### **O** Guide Price

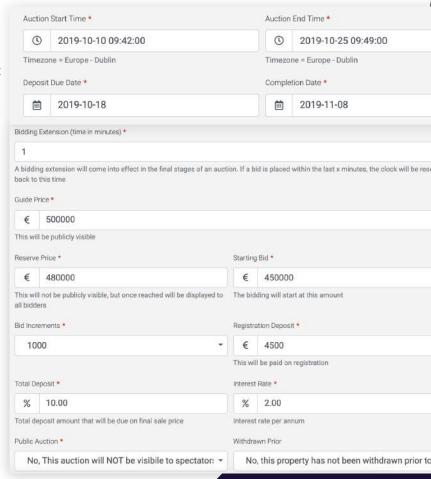
This will be visible on the Panel on your website. Reserve Price will not be visible until it is reached during the Auction.

### O Reserve Price

This is the agreed price that the property will sell for. This will not be visible until it's reached during Auction.

### O Starting Bid

The lowest acceptable amount that you want to start with.



### O Public / Private

Public Auction: Anyone can see. Private (only visible to logged in users).

### Payment Methods

This can be set to a specific payment or you can allow all supported types.

### O Registration

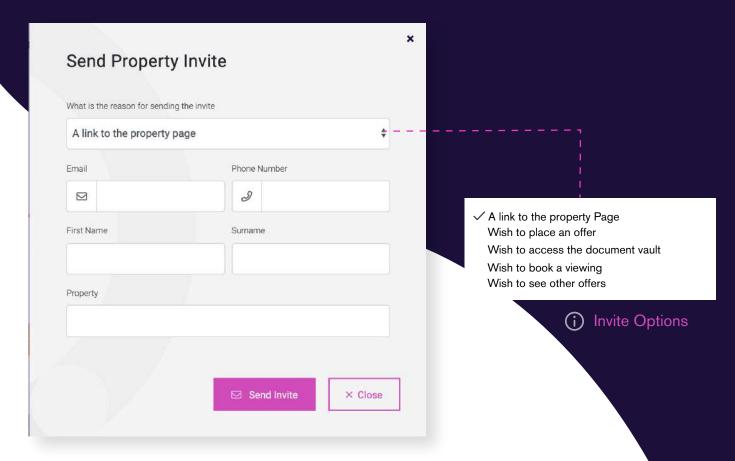
Allow users to register for Auction with / without Proof of address or Proof of funds.

## Inviting & Approving Buyers



### **Engaging the Buyer**

Queries will come in from interested buyers directly and via online portals. Once you have their email addresses you can invite them to view a property, make an offer or view legal documents. It's a quick and easy way to engage with these customers and to get them more invested in the property.



### Inviting the Buyer will trigger an email to a property



### Hi Hayley115

Acme Agency has found a property that they think will be of interest to you: 115 Biscayne, Malahide, Co. Dublin.

To view a property, you will need to register your email on our secure platform. Once complete you will be able to

- · View all properties

When the buyer clicks on the link in the email it will bring them to the specified property on your website.

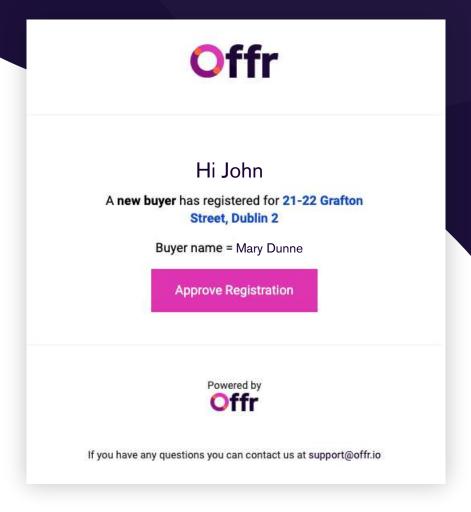
#### Here they can:

- Book a viewing
- Upload KYC documents
- Place an offer
- View legal doc

### Inviting Buyers

You can invite a buyer to register for an Auction or to place an offer through Private Treaty directly through the property on your website.

When the buyer registers you will receive an email notification immediately. This is a prompt for you to approve the documentation that they have uploaded.

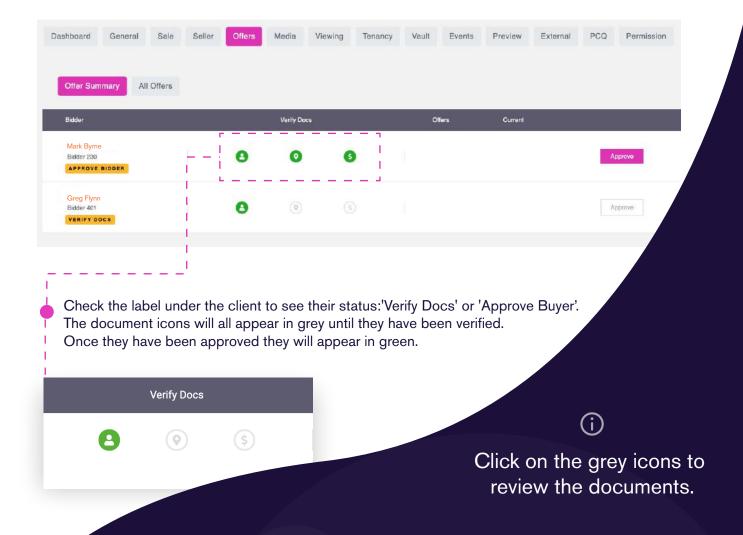




Clients cannot place a bid or offer unless they have been approved.

### Approving Buyers

To approve a buyer go to the ( offers tab for the property.



### Approving / Rejecting Documents

You have the opportunity to reject documents. If they are out of date, or unreadable. If you reject a document an automatic email will be sent to the buyer letting them know.

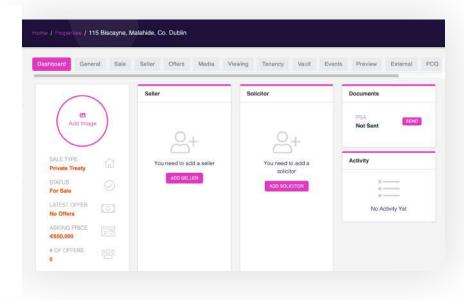
Your **Proof of Funds** has been flagged as **Illegible** 

Click here to resubmit your new document

## Inviting the Seller & Solicitor



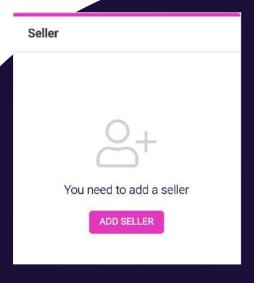
 You can invite the Seller & Seller's Solicitor through your property dashboard.

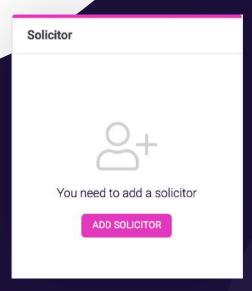


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### The Seller

Add the Seller's name, as you type, if the person is already registered on the system their details will appear. If not you will need to add them as a contact.





### The Solicitor

Add the Solicitor's details, this will follow the same process as adding the Seller.

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## The PSA



### PSA Integration

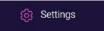
DocuSign PSA is fast, convenient, and efficient with a permanent copy stored in the cloud.

## **DocuSign**<sup>®</sup>

### Creating the PSA

To create the PSA you will need to set up a template. This will allow you to reuse the standard information each time.

Navigate to the the PSA tab.



of your profile and go to

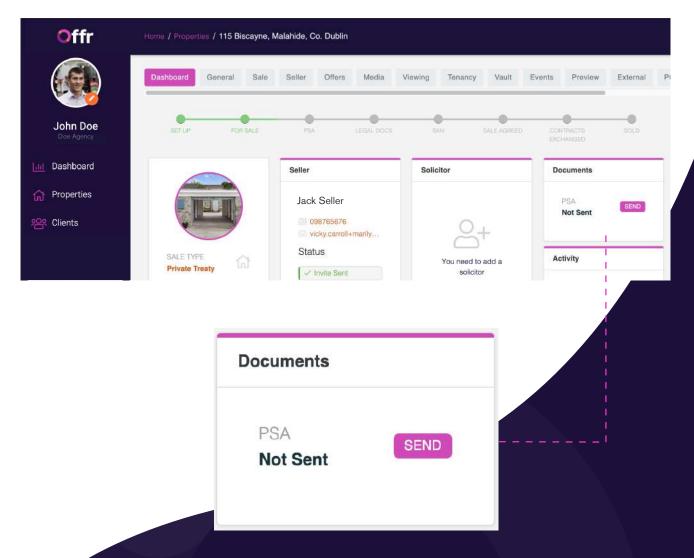
Descriptive name for this agreement template		
Bank Details		
Name on Account	Name of Bank	
IBAN		
Bank Address		
Dank Address		

O Click Add PSA Template

Fill in standard information and save.

### Sending the PSA

- Ensure the property has been set up
- Go to the dashboard of the property.



- Click Send & Select "Manage" PSA
   This will display a popup of the PSA form.
  - Review and fill in the details.
  - We recommend that you 'Save and Preview' before sending.
- Once you are happy with the information.

  Click the back arrow in your browser and Send to the Seller for their signature.

## The Private Treaty Process

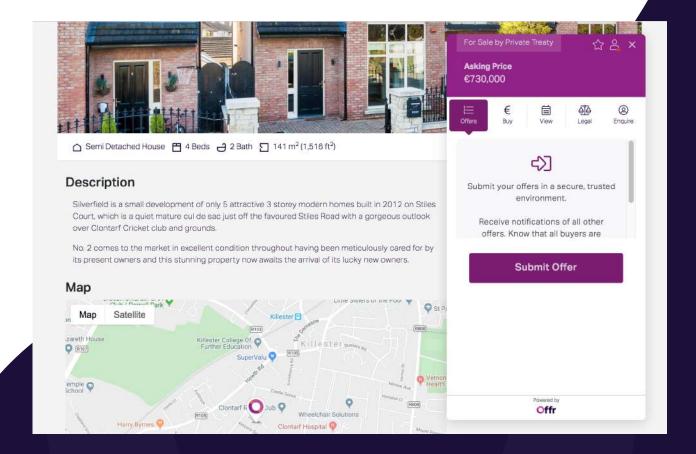


The Offr button is set up on your website, in your brand colours.
 Potential buyers can now place offers.

The panel will display the following information:

- O Latest Offer
- Asking Price
- Button to Submit Offer

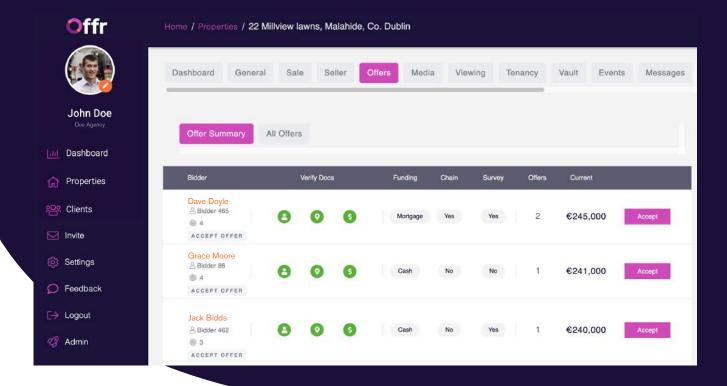
You can accept and approve buyers. Go to page.



### Reviewing and accepting offers

When an offer is made you will receive an email notification. All registered buyers that have placed an offer will also receive instant email alerts informing them of the latest bid. 

✓



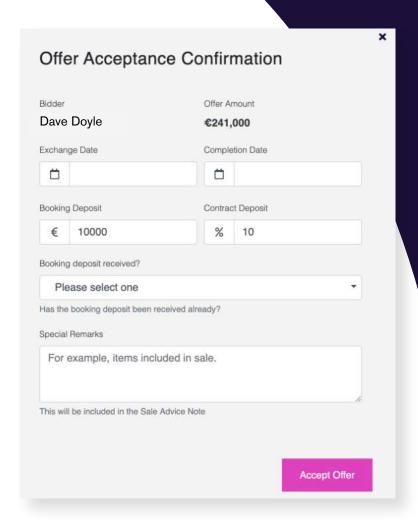
### Accept an Offer:

When you have determined which offer best suits your client, click 'Accept' on the offer that you are going to proceed with. All parties will be notified via email, Seller, Buyer and Underbidders.

### Fill in the details of the successful buyer.

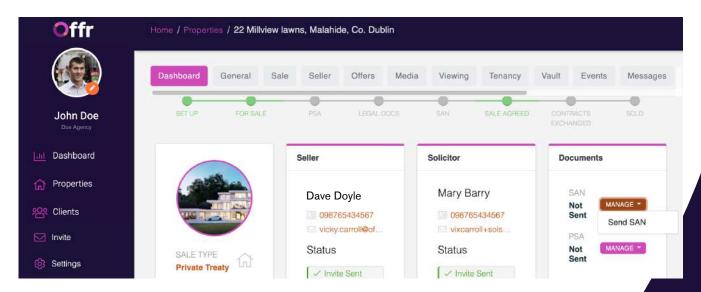
If the deposit hasn't already been received a payment deadline can be set out along with different payment methods which can be paid through Stripe or directly.

NOTE: The vendor and the vendor's solicitor will need to be signed up to Offr in order to 'accept' the final offer and to proceed with the Sale Advice Note.



### Sale Advice Note

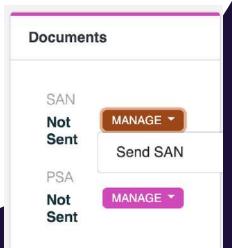
When the deposit has been paid. Go to your dashboard and click on 'Manage' SAN in the dashboard of the property.



This will display the Sale Advice Note. Once you are happy with the details click send.

O The SAN will be sent to all parties: Buyer, Buyer's solicitor, Seller and Seller's solicitor.

The Buyer's solicitor will receive an email confirming the terms of the sale and a link to download the contract and legal documents.



### Contract Exchange

Offr's secure, encrypted 'conveyance room' provide solicitors with a safe and convenient way to share documents and exchange key correspondence. They can quickly agree a final form of contract and approve the signing and exchange. If required, Offr provides the facility to execute contracts using DocuSign, where time is of the essence or one or more parties may be abroad.

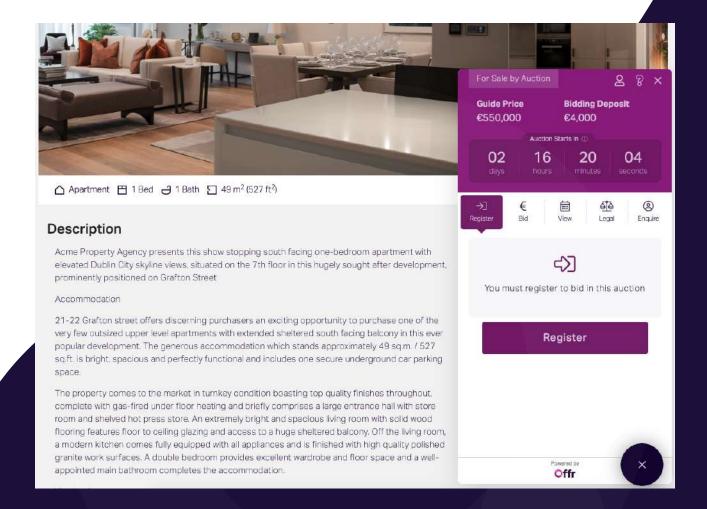
## **The Auction Process**



 Now that the Offr button is set up on your website in your brand colours - Potential buyers can now register to bid in an Auction.

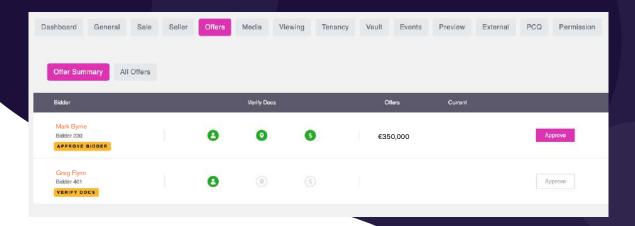
The panel will display the following information:

- O Guide Price
- Bidding Deposit
- O Auction Start Date / Time
- O Button To Register

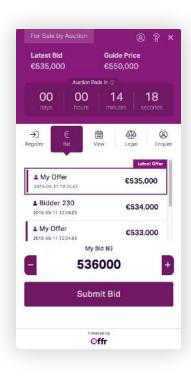


### Beginning of the Auction

Bidders can bid directly through the Offr Panel on your website. You can view the bids as they come through on the Offers tab. You can also see the registered users who are online at the time.



Bidding extension functionality is in place so in the event that a bid is placed within the last 60 seconds the clock will reset - allowing a further 60 seconds of bidding.

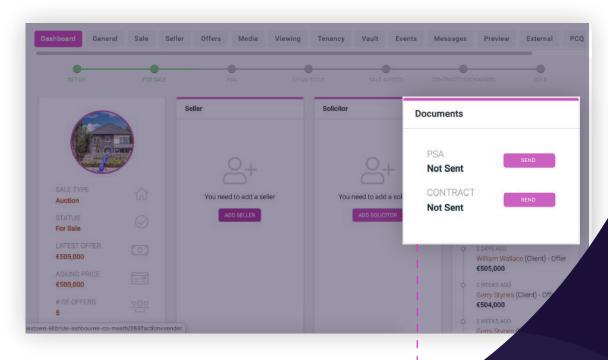


### Watching The Auction

If you want to see the customer view and watch the bids come through the Offr panel, you can do so on any device. Simply go to your property page and you can see the bid in your panel.

### Auction Complete

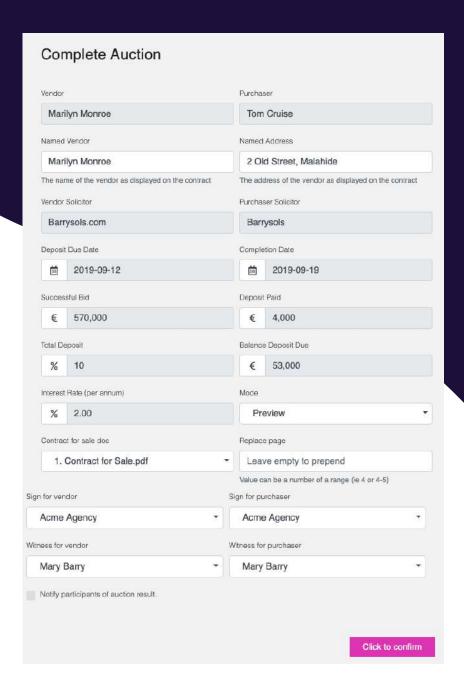
Once the auction is finished, the winning bidder will be notified that they have been successful. The underbidder will be notified that they have been unsuccessful.



Go to the Property Dashboard In the documents panel Tap 'Send' contract

### Review Contract

You can review all the details of the contract.



### Review Memorandum of Sale

Once you are happy with the details return to the previous screen. You can append the Memorandum to the front of the contract or insert it and replace a page or a number of pages.

### Signing & Witnessing The Contract

As the Agent, you may be signing the contract on behalf of the Vendor and the Purchaser. A witness will be required to sign also.

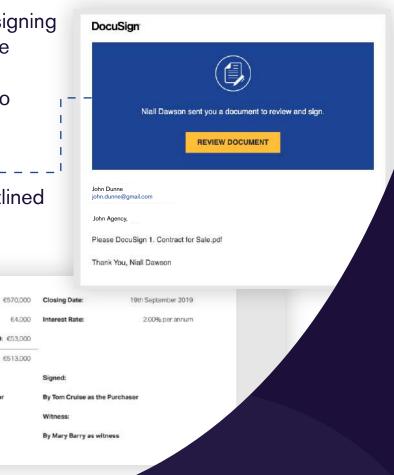
Click 'Review Document' - - - -Follow the simple steps outlined Sign & Click finish.

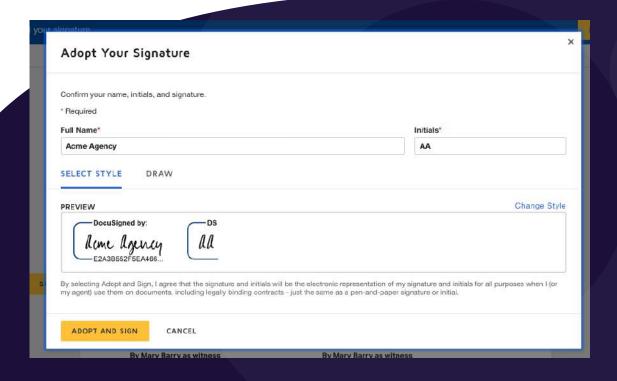
> Purchase Price: Less Deposit Received:

Less Deposit Due 12th September 2019: €53.000 Required - Sign Here

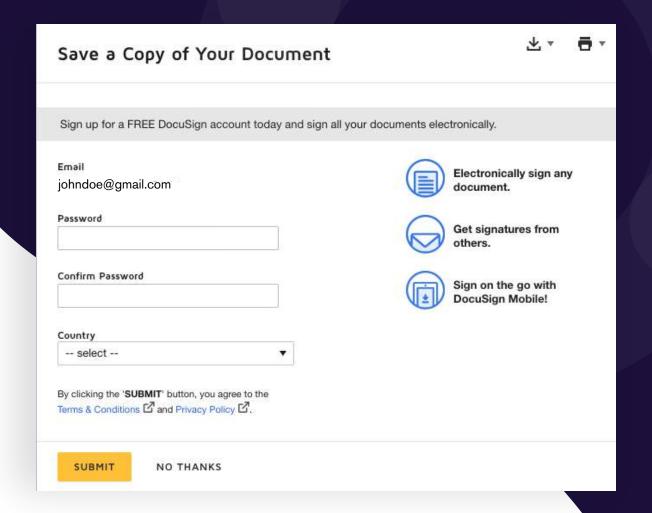
By Acme Agency as agent for the Vendor

By Mary Barry as witness





64,000



### Saving a copy of your document

With Docusign, you can save any documents signed.

### DocuSign<sup>®</sup>

### You're Done!

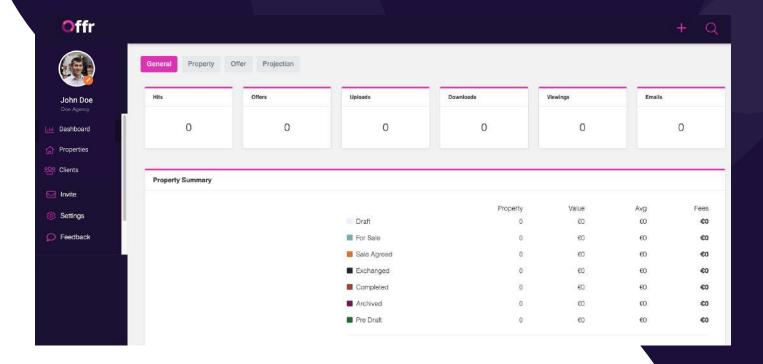
You'll Receive an Email Copy Once Everyone Has Signed

## Your Data, Your Dashboards.



### Your Data

We will automatically create a dashboard for you. As soon as you add your first property we will start posting your data here. This will be a high level view of all of your properties and will provide at a glance an overview of the current state of all your transactions.



### Property Dashboard

We'll keep you up to date with all of the important information. As well as telling you what's outstanding and needs attention!

