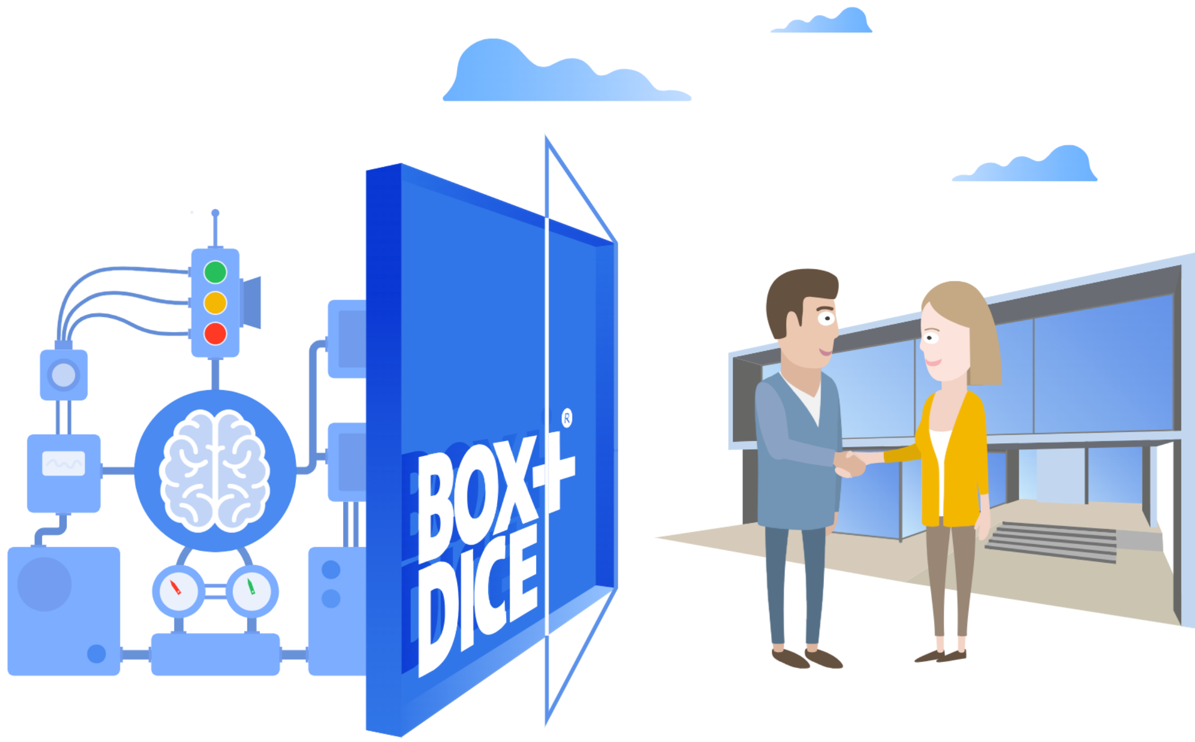
FROM INDIVIDUAL AGENTS
TO INTERNATIONAL NETWORKS

WE STAND BEHIND **YOUR EVERY DEAL**



BOX+DICE VERSION 4.0
RELEASE NOTES
JUNE 2020

INTRODUCTION

Welcome to version 4.0 of Box+Dice, codename 'Alignment'!

One of our largest projects ever, with over 1,000 person-days of development time, Alignment provides many immediate benefits for uses and provides a platform for further development in the coming months and years.

From a technical perspective, about a third of the codebase has been replaced using newer technologies built for performance and innovation.

Look & feel-wise, we've created a common visual language and user experience application-wide. Years of your feedback has been incorporated, so there are lots of small and large enhancements and fixes for everyone.

We expect you'll find it easy to adapt to this version; major change is limited to a few areas – for example the powerful new filtering capabilities in the Contacts and Sales screens, and the Buyer Register (now Buyer Leads) redesign.

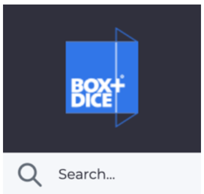
To keep this document brief not all changes are noted here. Many updates are intuitive, for example the new 'Forgot Password' function on the login screen.

For up to date versions of these notes, please refer to the article 4.0 Release Notes in the Box+Dice Help Centre.

We hope you enjoy exploring the new version and look forward to your feedback!

The Team at Box+Dice

NAVIGATION



Quicksearch is THE place to start in Box+Dice. Search for and add Contacts and Properties, and navigate straight to the record. (Fig 1)

Figure 1 - Quicksearch

Don’t forget that Box+Dice is fully browser enabled, so you can use the Chrome Back button, and also open any link in a new window to work on multiple screens simultaneously. (Fig 2)

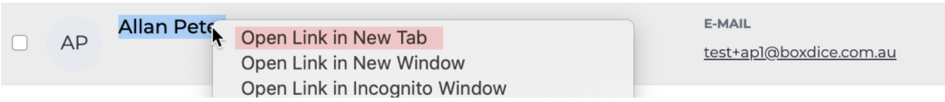


Figure 2 – Open Link in New Tab

The **Side Bar Menu** has been slightly reorganized:

- Separate screens for Prospecting & Projects (under Properties), and Rentals.
- Tasks & Appointments have now been separated.
- Other is renamed to More (signified by an Ellipsis icon)

Throughout the system you will notice **Contact Popovers** – they enable you to work with Contacts wherever you are in the system without losing your place. Just click the ellipsis icon next to the Contact name. (Fig 3)

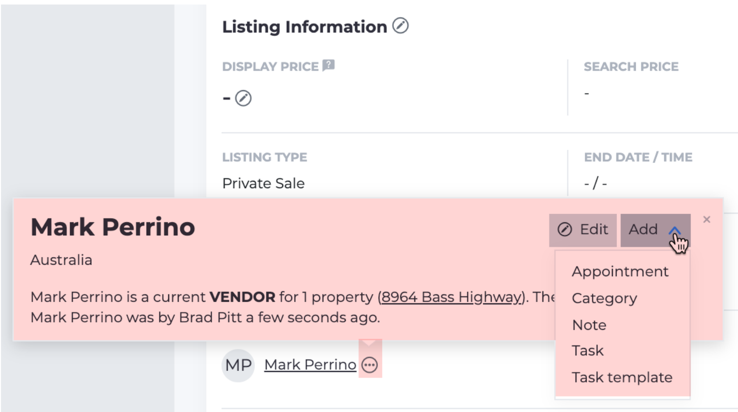


Figure 3 – Contact Popover

Sales, Projects and Rental activity is now denoted by S, P and R icons in the Contact and Property timelines.

Online Chat has been retired.

DASHBOARD

The **Entity Selector** has returned – subject to your access level, view the Dashboard stats and graphs for a single Consultant, a Consultant Group, or one or more Offices. (Fig 4)

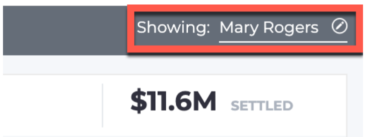


Figure 4 – Entity Selector

Favourite Filters which are saved on the Contacts & Sales screens are displayed on the Dashboard for easy access. (Fig 5)

The old Dashboards have been retired.

Appraisals in the header row now drills through to Appraisal Pipeline (see Appraisal Pipeline section).

YTD Sold and Settled figures now work on Financial Year to Date from Settings.

Appraisal Pipeline Graph has been added at the bottom right. (Fig 6) Toggle to and from Transactions Graph.

Figure 5 - Favourites

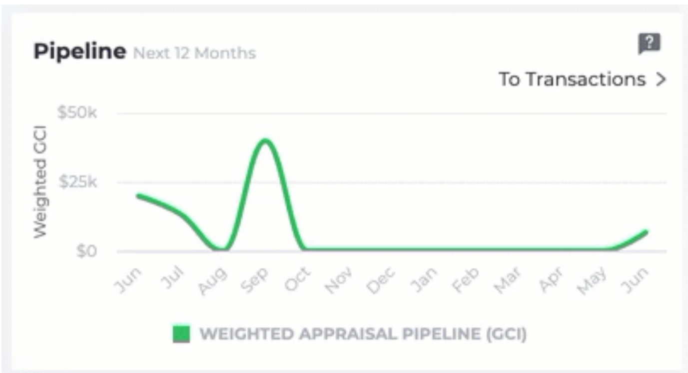


Figure 6 – Appraisal Pipeline

APPRAISAL PIPELINE

The **Appraisal Pipeline** has been reinstated and upgraded. Access by clicking on Appraisals in the top bar of the Dashboard. (Fig 7)

866 APPRAISALS

Figure 7 - Appraisal Tile

Once the Appraisal Pipeline is displayed, you'll see a chart showing weighted GCI in the selected Consultant or entity's pipeline for the next 12 months. This is a larger version of the new mini-chart on the Dashboard. (Fig 8)

A **Weighted Pipeline** multiplies the expected GCI by the likelihood of winning the Listing. By factoring in the probability, you have a truer idea of where you need to focus your efforts, and by grouping Appraisals into 'month they will list' you are encouraged to think beyond 'what can I list this month?'.

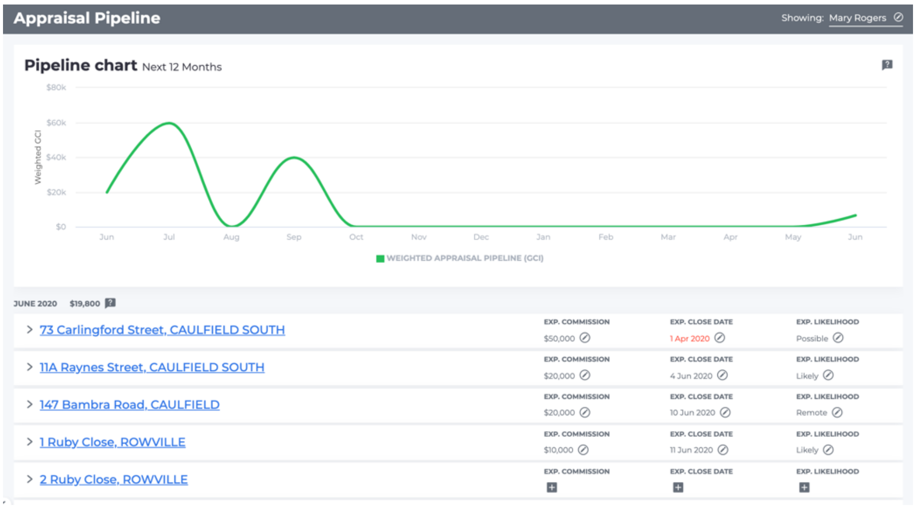


Figure 8 – Appraisal Pipeline

Appraisals are grouped into the month the Prospective Vendor will make a decision (by Expected Close Date), and each month shows the weighted total next to the Month heading. *In Fig 8, that's $19,800 for June.*

The current month is a little different. It additionally includes

- Appraisals with close dates in the past. Dates are shown in red to remind you to follow up, and Expected Commission is not included in monthly total.
- Appraisals without Expected Close Dates.

Other notes:

- Amounts, Dates and Likelihoods can all be edited in line.
- Click the **>** symbol (we call that a 'twistie') to expand the details.
- Click the Appraisal Address to navigate to the Appraisal.

NEW ‘POWER’ FILTERS

We know how attached everyone is to the Advanced Contact & Listing filter screens, so we’re pleased to launch next generation filtering for both these areas.

Built for maximum performance and flexibility, the new **Contacts and Sales filter screens** give you all the power of the Advanced Screens – and more – to slice and dice your data.

Features:

- Use Default filters we’ve created to get you started.
- Create your own simple (or complex) queries and save them, or Favourite them to show on the screen and dashboard.
- Customise columns and sort order. Note that there are two views in the Contacts screen – ‘Basic’ and ‘Table’. Column customisation is only available in Table view.
- Open a filter, modify it and Save As.
- Share filters with others in your Office Group.
- Delete unwanted filters.
- Search within your results.
- Export records to csv (if you have permission).
- Print your existing system and custom reports.
- Access the old Advanced Screens via the Other menu.

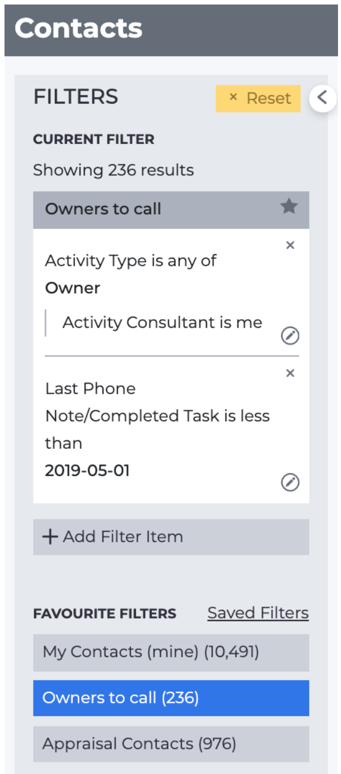


Figure 9 - Apply Saved Filter

NOTE: Unfortunately, we can’t migrate your existing Advanced Screen Favourites to the new screens, so we’ve left the Advanced screens in place for a couple of months to give you time to do this. (Don’t forget you can open in a new tab and have the screens side by side.)

For more detail and video tutorials, search ‘Filter’ in the Help Centre.

OTHER FILTER SCREENS

Properties>Prospecting – this is similar to the previous Properties screen, and is where you'll find Map Search, simple checkbox filters, and do your prospecting. Work with Appraisals here too. (Fig 10)

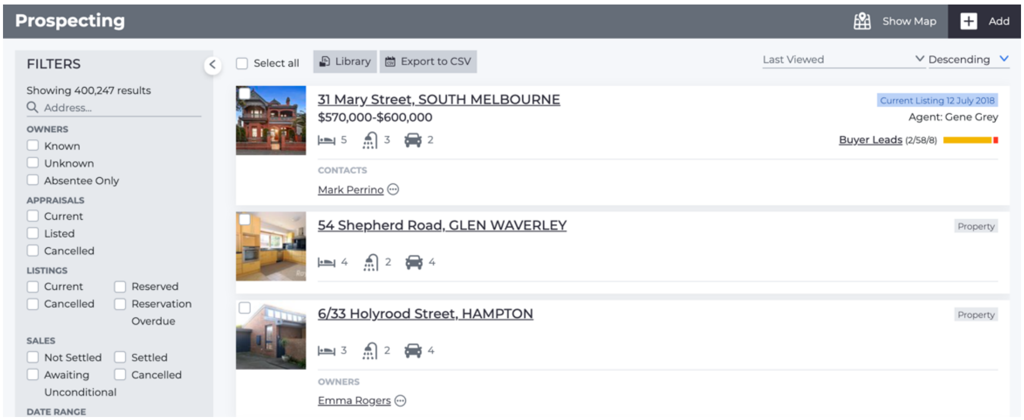


Figure 10 - Prospecting Screen

Properties>Projects – a special destination for Projects users which excludes Residential Listings. Only the latest event is shown in the results.

Rentals – Instead of a tab, Rentals now have their own screen!

ACCOUNTING

The Accounting screens, both Trust and Advertising, have been restyled with a particular focus on showing more information on the screen to reduce scrolling; a change based on your feedback.

Functionally, there's no major difference from the previous version.

CONTACT DETAIL SCREEN

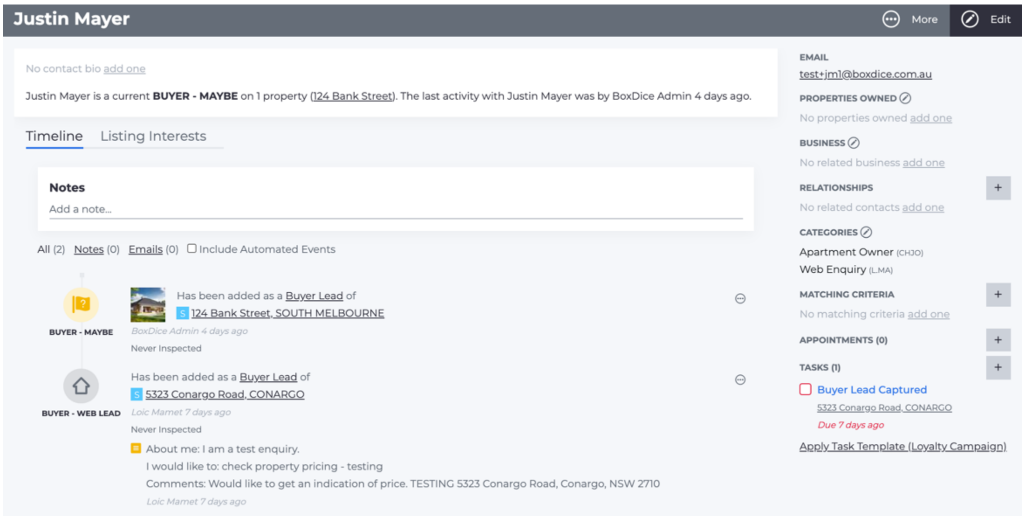


Figure 11 - Contact Detail Screen

The Contact detail screen has been restyled, and we've added some cool new features.

Consultant initials are shown next to **Categories**.

There's a new tab '**Listing Interests'** which replaces the Contact Buyer Register.

If you use Lead Capture (formerly Ingesta) you'll see a new type of Buyer activity on the timeline - **Buyer – Web Lead**. These enquiries are now automatically added to the Buyer Leads (formerly Buyer Register) screen. See that section for details.

Buyer activities now show the **Last Inspected** Date, or 'Never Inspected.'

Matching Criteria now shows Matched Listings in the modal, saving a couple of clicks.

Add the Buyer to Listing/s on the fly, or send a Blast email with selected Listing/s. (Fig 12)

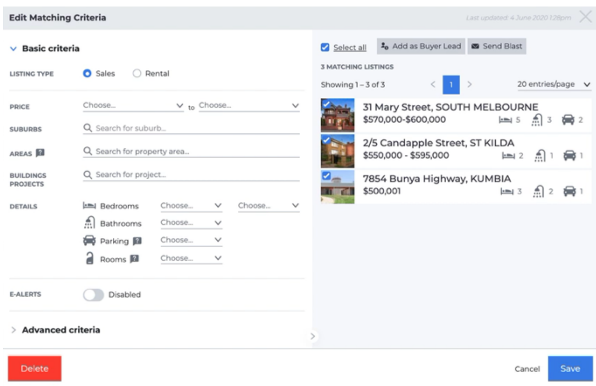


Figure 12 - Edit Matching Criteria

Loyalty Campaigns have been renamed to **Task Templates**.

- All your existing task templates are still there.
- The design is updated but functionality is the same.
- **SMS Library templates** can now be attached to Task Template items.

PROPERTY DETAIL SCREEN

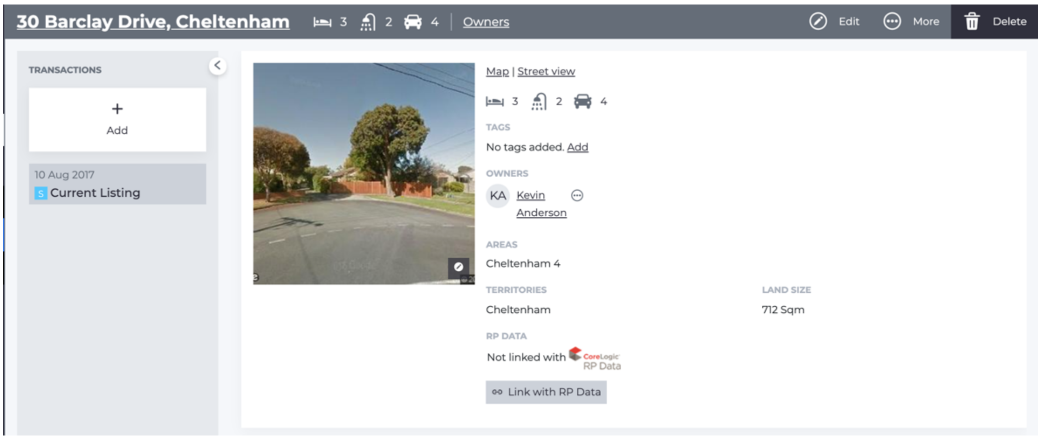


Figure 13 - Property Detail

With a fresh new look, the Property and Transaction detail screens give you everything you need at your fingertips.

Owners and **Property Attributes** are visible at all times in the header.

The **Property Timeline** has moved to the left bar, and you can easily add transactions using **+ Add**.

Click a tile in the left bar to view any Transaction, whether it's a Sold by Other, a Sales, Projects or Rental Appraisal or a Sales, Projects or Rental Listing. There are **S**, **P**, and **R** icons so you can easily distinguish.

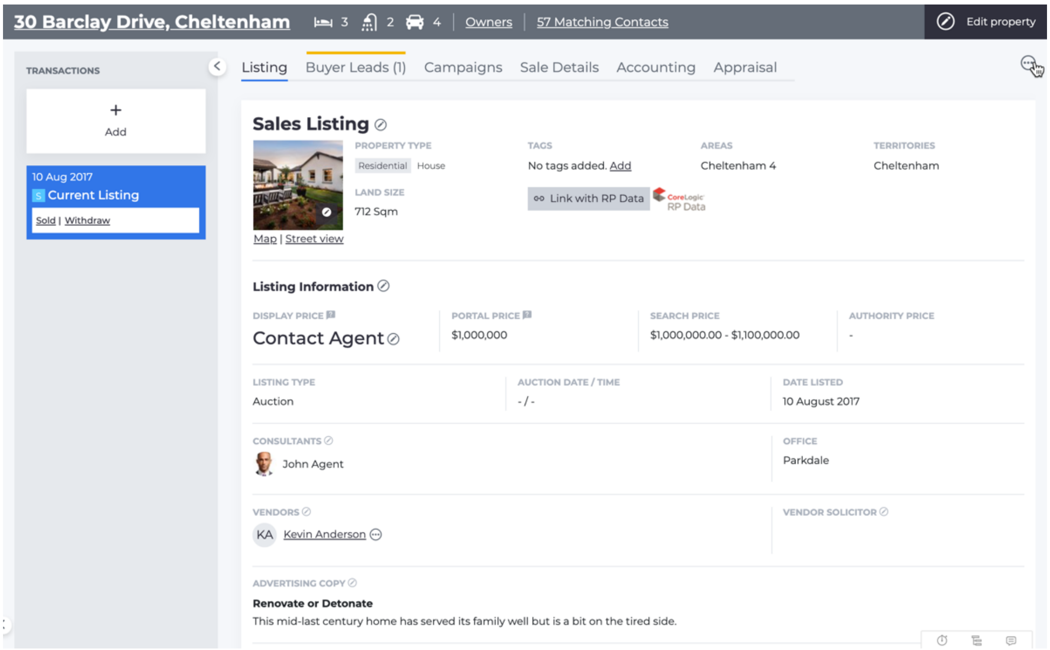


Figure 14 - Sales Transaction screen

TRANSACTION DETAIL SCREEN

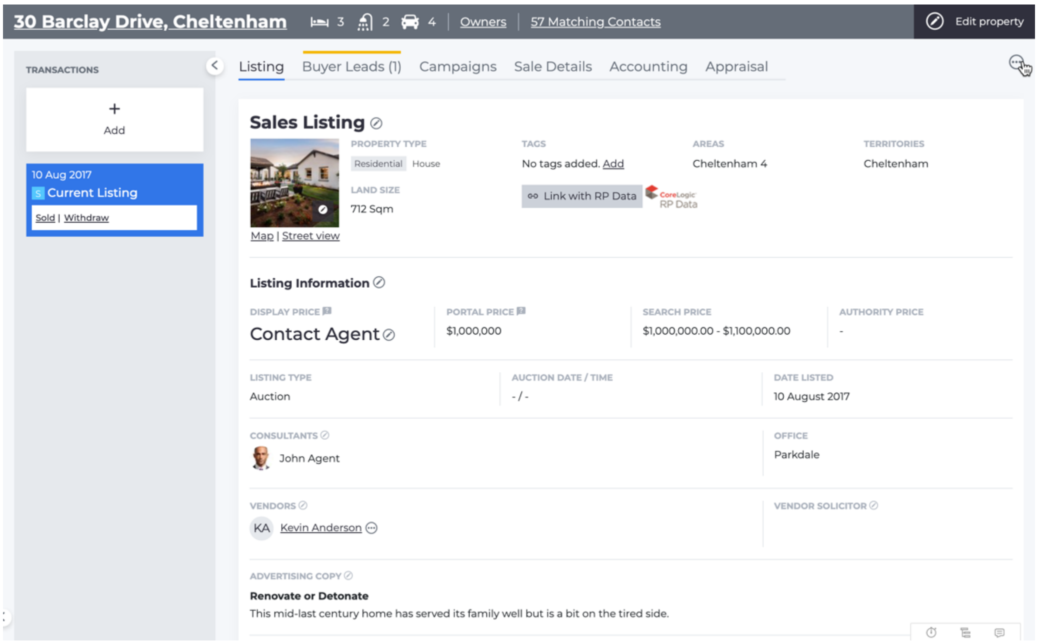


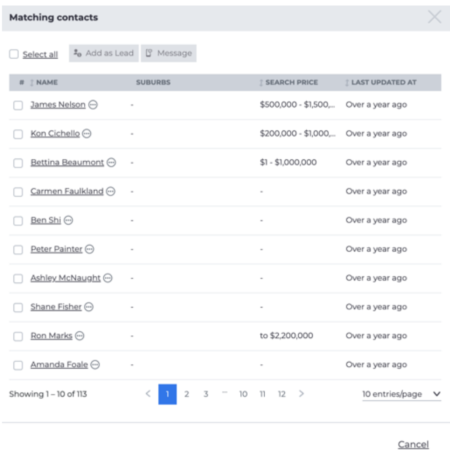
Figure 15 - Transaction Details

The Property timeline is now on the left of screen.

The Buyer Register is now called **Buyer Leads**.

When an Appraisal has been converted to a listing, the Appraisal details are visible in the **Appraisal tab** to the far right, rather than a separate item on the timeline.

Appraisal and Listing screens always show a count of **Matched Buyers** at the top, which opens a modal with a list of Buyers (Fig 16).



From here (with the right permission) you can:

- Add to the Buyer Leads tab
- Send an SMS
- Send a Blast.

Figure 16 - Matching Contacts

LEAD CAPTURE (FORMERLY INGESTA)

There has been a restyle of Ingesta, now called **Lead Capture**, and we've added an exciting new feature: Lead Capture enquiries are now written directly to the Buyer Leads screen of a Listing.

They are identifiable as 'Web Leads' in the **Buyer Leads** screen and are segregated initially for viewing and reporting. Once the Lead is qualified and moved to IN, MAYBE or OUT status it will become visible and be counted in the Buyer numbers (and no longer be segregated). See Buyer Leads section below.

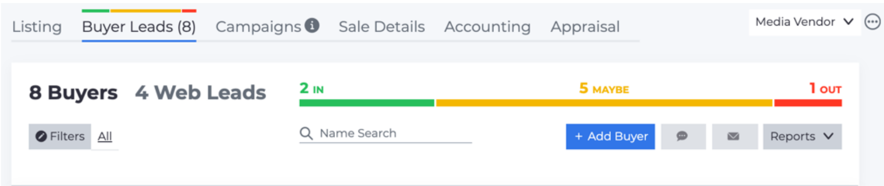
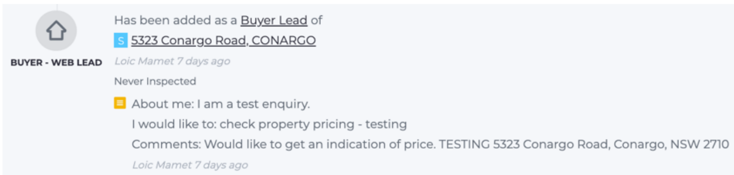


Figure 17 – Buyers vs Web Enquiries

In the **Contact timeline**, Lead Capture enquiries now show as a type of Buyer Lead, and all continuing Buyer activity is nested within. As the interest level changes, the Buyer status updates to IN, MAYBE or OUT.

Figure 18 - Web Lead in Contact Timeline



All existing features such as Auto-responder, the Enquiry Dashboard and Auto Task Creation remain.

BUYER LEADS

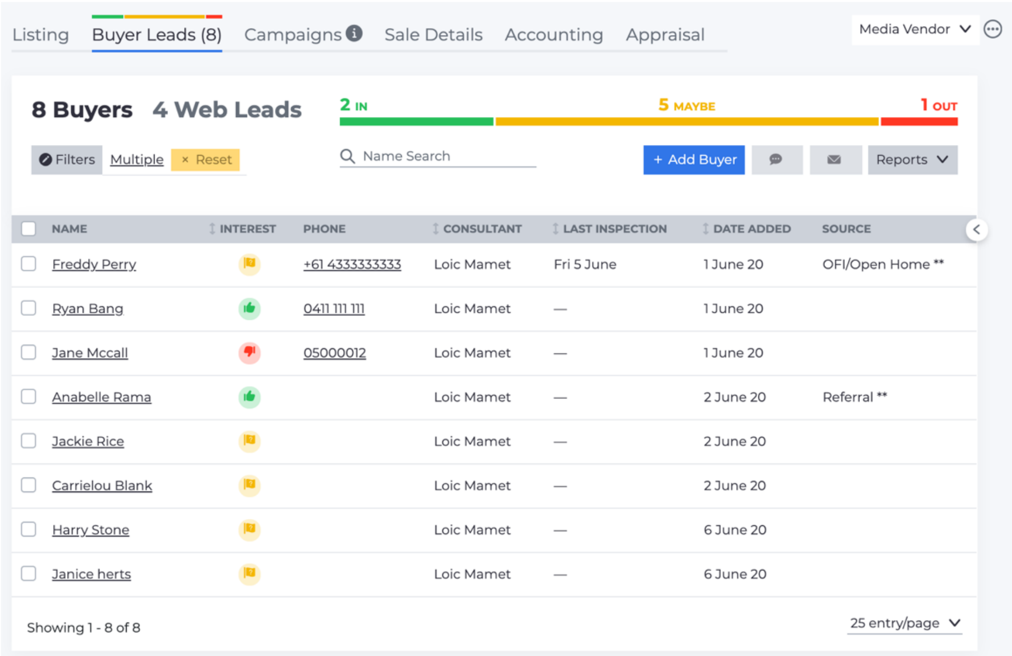


Figure 19 - Buyer Leads screen

The Buyer Register has been renamed **Buyer Leads**.

Don't forget you can also add Buyer Leads to an Appraisal now, and gather buyers before the property even hits the market.

Let's look at what else has changed in the List View:

- The Buyer Leads tab has a count of Buyers (excluding Web Leads) and a mini interest graph which you can see any time, even when on another tab.
- Easily switch between Buyers and Web Leads by clicking on the respective heading.
- Icons for IN, MAYBE, OUT. You'll notice that Web Leads have no interest icon because they are unqualified.
- Further filter by Interest Level, Consultant, Inspection Contract, Offer.
- Select Buyers with checkboxes then SMS, Email or print Reports.
- Buyer Note types no longer exist and this has necessitated some changes to reports.
- We're working on a new, modern Vendor Report which will be released in the coming weeks.

BUYER LEADS (CONTINUED)

We've heard your feedback about creating a better experience in the Buyer Detail screen, especially when doing **callbacks**.

Click on a name in List view to open the **Detail view**.

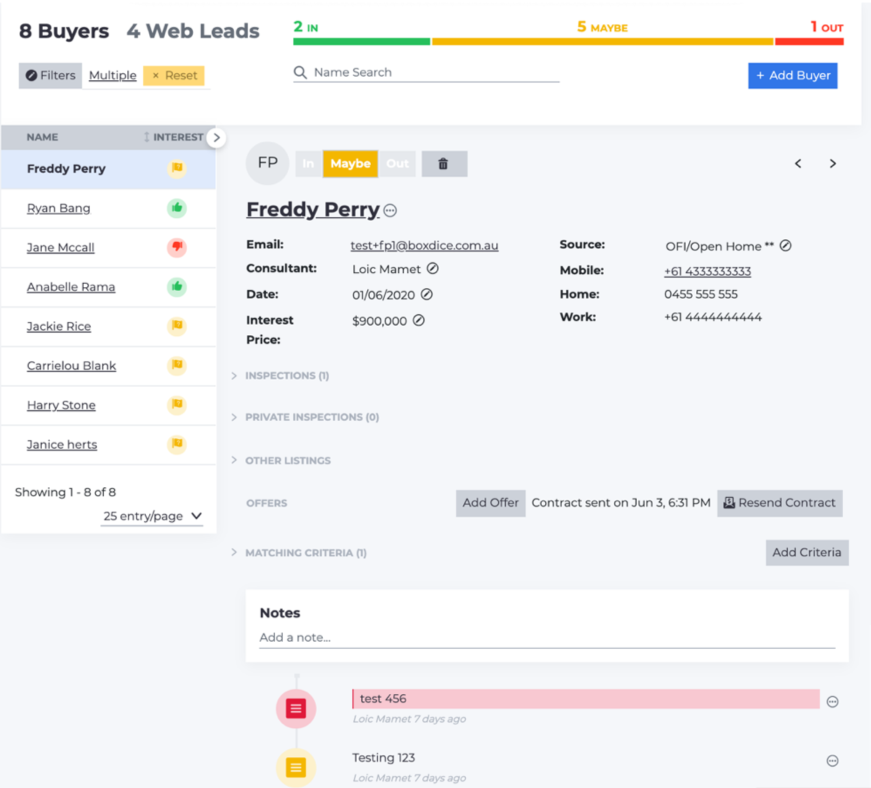


Figure 20 - Buyer Detail screen

The Buyer list shrinks and the details open to the right, without losing your place in the list. This screen layout, which is similar to the Agent App, lets you:

- Call, email or SMS the Buyer
- Update contact details on the fly
- Change the Interest Level to IN/MAYBE/OUT and record $ Interest
- Make a Note and see prior Notes
- View and record inspection attendances (Private and OFI)
- See their other Listing Interests
- Add an **Offer** or **Send a Contract with one click**
- Add **Matching Criteria** without leaving the Buyer Leads screen, and copy price, suburb, minimum beds from this listing to save clicks
- Use the ellipsis to access the Contact Popover or click the hyperlinked name to open the Contact record.

To move to the next buyer, click their name or use the **< >** (back/forward) buttons at the top right.

GLOSSARY

New Name	Old Name
Lead Capture	Ingesta
Buyer Leads	Buyer Register
Listing Interests	Buyer Register by Client
Prospecting	Properties
Web Lead	Web Enquiry.
Task Templates	Loyalty Campaigns