

Quick Guide for Stakeholders

Help to Buy East and South East



Your Help to Buy Agents for the East and South East
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Getting started...

Log in at www.helptobuyese.org.uk/stakeholders using the username and password you have been given by your Stakeholder Manager.

Contact us at: HTBStakeholders@bpha.org.uk if you've forgotten or need log in details.

The Home Page gives our contact details and any important information we need to share with you.

Downloading applications from our database

- To download an application, click on 'Applications' and then 'Manage Referrals' (it's called Referrals because you can refer an applicant for a property if you choose to).
- This page will show all the applications your organisation has accessed from our database.
- Select 'Create Referrals' (you have to 'create' to enable you to download the application form).
- Usually we recommend entering the application number first before completing the other sections. This double checks that the application is in fact approved.
- Enter approved app number in the Application ID box and then click 'search'. This will bring up the applicants name in the box below showing the status, you will only be able to download if at approved status.
- You can then go on to enter the other details.
- Enter a property ID number if you know it or if it's applicable (this isn't mandatory).
- Enter the scheme/product the property is being sold under.
- Then press 'Publish'.
- This will take you back to the referrals screen and you will see the referral you have just generated at the top.
- Click 'Actions, then 'Download application PDF'.
- You can print off and save this application to your files.

Downloading market appraisal information from our database

- Click on 'Applications' and then 'Manage Nominations'.
- This page will show all the lists your organisation has accessed from our database.
- Click on 'Create a nomination list'
- Select 'Create Nominations'
- You can ignore property ID if this isn't applicable.
- You can also ignore estimated handover date.
- If there is a live/work connection you can add the LA in these fields. If there are no restrictions you should put the LA of where the property/development may possibly be in as 'interested in living in'.
- Enter the minimum income (enter the number 1 if you do not have a minimum).
- Enter the bedroom sizes (you can select more than one).
- Click 'submit'.
- This will take you back to the nominations screen and you will see the nomination you have just generated at the top.
- Click 'Actions', then 'download to excel spreadsheet'.
- This will open an excel document you can save and filter.

Adding properties to our website

- If a property is part of a development you should add the development first. This means when the development name is typed into the front end of the website all the properties under that development come up. However, a development will not show on its own. You must have added properties to the development for anything to show. It is basically a way of collating your properties together.
- To add a development select 'Developments and Properties'.
- Then 'Manage Developments'.
- Then 'Create a Development'.
- Enter all the information and add a photo either from already uploaded or your computer.
- Click 'Publish'.
- This usually adds at the bottom of your list of developments.
- **You then need to add at least one property as part of this development by selecting 'actions' then 'Create Property'.**
- If you only have the one image that you added to the development then select 'use development image'. If you would like to upload a different image leave this un-ticked.
- Enter all the details.
- If you don't know the postcode yet you can enter a postcode close to the development and move the pointer around until it's in the correct location.
- For the rent element leave this blank as the shares will automatically be calculated. If it is a resale you can add in the current rent, however the share calculator will not work for applicants with a fixed rent.
- Select 'publish'. This property is now added as part of the development.

If you have a property that is not part of a development, a resale for example, you add it slightly differently.....

- Go to 'Manage properties'.
- Click 'Create a new property'.
- Enter all the details and then select 'publish'

To delete, deactivate, archive and edit your properties please use the '**Actions**' button to the right hand side of the listing.

Reporting your LCHO online completions

- Go to application and click on “manage completions”
- Select “submit completion”
- Enter, ‘application ID’ or ‘applicant name’ (ID is much quicker and more accurate). Select ‘search’.
- Enter ‘Property ID’ or select ‘show all properties’ and choose property from list. Enter the date offered (this should be memo of sale date) and the date completed. Click ‘Activate’
- The property you are completing on must be showing as active and available for you to see in your drop down list in the manage completions tab. You can then go back in to the property and change the status once the completion has been recorded.
- Please do keep your properties on the site updated with current information

PLEASE ENSURE YOU DO NOT REUSE A TEMPLATE FOR A PROPERTY LISTING.

YOU MUST USE A NEW TEMPLATE TO ENABLE THE COMPLETIONS TO RECORD ACCURATELY.