Home Information Pack Provider System

<table>
<thead>
<tr>
<th>Title</th>
<th>Home Information Pack System</th>
</tr>
</thead>
<tbody>
<tr>
<td>Version</td>
<td>1.04</td>
</tr>
<tr>
<td>Date</td>
<td>20th May 2008</td>
</tr>
<tr>
<td>Copyright</td>
<td>© Landmark Information Group</td>
</tr>
</tbody>
</table>

N.B. YOUR SYSTEM MAY DIFFER FROM THIS ILLUSTRATION.
INTRODUCTION

This Web based IT solution is designed to enable a seamless assembly of Home Information Packs. This system enables you to create and case manage new HIP instructions securely from any location. It provides the following features:

**Seller**
- Progress updates by SMS Text Message and Email.
- Online access to complete the Home Contents & Home Use forms.
- Free secure online access to their completed HIP.

**Estate Agent**
- Free secure access to your HIP site to enter instructions.
- Branding of the site to the agent.
- Upload sales particulars to add into the HIP.
- Free access to Land Registry price check data.
- Free online access to the completed HIP.
- Free access to EPC Generator for Sale Particulars.

**Solicitors**
- Free secure access to your HIP site to enter instructions.
- Branding of the site to the Solicitor.
- Free online access to the completed HIP.
- Upload documents to the HIP (e.g. Leases & Searches).
- Online access to complete the *optional added value* Legal Condition Report.

**HIP Provider**
- Full access all cases entered by yourself and all other users of your website.
- Flexibility to configure to the individual user e.g. Branding, Suppliers & Fees.
- Integrated Finance solution for upfront and deferred payment terms.
- Print fulfilment with next day courier delivery.

SYSTEM REQUIREMENTS

The Quest Home Information Pack system is designed to work with Internet Explorer 5.5 or above and most systems will have this. It is important to note that only Internet Explorer 5.5 or above should be used, other browsers may appear to work but may not be fully functional.

Modern versions of Windows - XP Home, XP Professional or Windows 2000 Professional should work with minor configuration changes. Older systems such as Windows 98, 98 SE and ME may require additional configuration changes in order to work correctly. These changes are detailed in the Browser Security Settings section.

IMPORTANT NOTE

When browsing any internet pages within the Q-Hip System it is important that you do NOT use the back, refresh or forward navigation buttons in Internet Explorer. You must ensure that you always log out and exit the software using the buttons provided. If you close the browsers incorrectly this may prevent you from logging in. This software is not supported on Apple Macs or alternative internet browsers e.g. Firefox, Yahoo or AOL.
SYSTEM SET UP

Pop-up Blockers

Some of Quest Associates Internet based products utilise the Internet Explorer Pop-up window utility for some of the software functions. These pop-up windows are NOT nuisance or harmful advertising and if blocked may prevent some functions of the system working. To ensure that when using the software you do not experience any problems, we would advise that pop-up blockers are configured to show Quest Associates websites as a Trusted source.

Internet Explorer has a built in pop-up blocker, the other most popular ways to install a pop-up blocker is to install a free toolbar from your Internet service provider. Here is a list of some of the most popular toolbar pop-up blockers: -

Google Toolbar
Yahoo Toolbar
MSN Toolbar
AOL Toolbar

Internet Explorer – Pop-up Blocker

Within Internet Explorer select “Tools” then scroll down to “Pop-up Blocker” and select “Pop-up Blocker Settings”.

In the Pop-up Blocker Settings window, type the address of the Quest Associates website e.g. https://*.uksv.net within the “Address of Website to allow” section. Once the address has been entered then select “Add” and then “Close”

You will be returned to your Internet Explorer window.
Google Toolbar & Pop-up Blocker

Open the Internet Explorer browser and then in the address bar key in the address of the Quest Associates website you are trying to access (e.g. https://questhip.uksv.net).

Within the Google toolbar select the “blocked” button and this will always allow pop-ups on the site. The blocked button will then change to show “popups okay”.

BT Yahoo Toolbar & Pop-up Blocker

Open the Internet Explorer browser and then in the address bar key in the address of the Quest Associates website you are trying to access (e.g. https://questhip.uksv.net). By default, the Yahoo Pop-up blocker blocks all pop-ups so first check if it is enabled. See picture below

Select the icon which looks like a window with a shield in the bottom left hand corner and then select “Always Allow Pop-Ups From...”.

MSN Toolbar & Pop-up Blocker

Open the Internet Explorer browser and then in the address bar key in the address of the Quest Associates website you are trying to access (e.g. https://questhip.uksv.net). The MSN Pop-up guard is part of the MSN Toolbar and by default it blocks all pop-ups.

Within the MSN toolbar select the drop down arrow to the right of the “Blocked / Allow” button and then select “Allow Pop-ups for This Site”.
Browser Security Settings

In order to use some aspects of the Quest system over the Internet it is necessary to install an ActiveX control. Before this can be done, your website must be added as a trusted site in order that the ActiveX control can be installed and used.

Open Internet Explorer

Go to the "Tools" menu at the top of your screen and select the "Internet Options"

Select the "Security" tab

Click on the "Trusted Sites" icon

This will then un-grey the "Sites" button,

Click on "Sites" button

The next window will appear, titled “Trusted Sites”. In this window you will need to enter the following: -

In the box “Add this website to the zone” type

https://*.uksv.net
http://*.uksv.net

Click the "Add" button

Click on the “OK” button to close the "Trusted sites" window.
Then, within the window titled “Internet Options”, click on the option for “Custom Level” and a window titled “Security Settings” will appear.

All of the ActiveX components are required to be set to “Enable”.

Once they are all set to “Enable” then click “OK”.

You will be prompted if you are sure that you wish to change the security settings in this zone, click “YES”.

The “Security Settings” window will then close and return you to the “Internet Options” window.

Within the Window titled “Internet Options” you will now need to:

Click on the “Advanced” tab (far top right),

Scroll down to the “Security” section

Tick “Empty Temporary Internet Files folder when browser is closed”

Click “OK”.

![Security Settings Window](image)

![Internet Options Window](image)
**Adding the Website to your Favorites**

Within your Internet Explorer Browser you will need to add your website address into your Favorites.

In the Address bar within the Browser type the address of your website that Quest have provided you with e.g. [https://questhip.uksv.net](https://questhip.uksv.net), then press the **“Enter”** key on your keyboard. This will then take you to your website Home page.

Then click on the **“Favorites”** button at the top of your browser.
This will bring a drop down menu on screen. Within the menu select the “Add to Favorites...” option.

The following window will appear.

Within the “Name:” box type the title that you wish the favorite to be referred to as e.g. “Quest HIP System”. Click “OK” and the window titled “Add a Favorite” will close.

**IMPORTANT NOTE**

The system requires an outbound connection to the internet to allow uploading of documents to the system to take place. Normally outbound connections to the internet are not restricted, if yours are please inform your IT system administrator to allow outbound port 49165 TCP.
LOGON PROCEDURE

Open “Internet Explorer” and select the “Quest HIP System” option from your “Favorites” menu, you will then be taken to the Logon screen.

Enter the Name and Password you were issued along with your own initials and click “Logon”. If your internet connection does not have a static IP address and you have been advised that you need to dial a number to authenticate your logon, the numbers you need to dial for two rings are either 01483 424709 or 01344 428970.

IMPORTANT NOTE

You will NOT be charged for this call, as it will NOT be answered.
Displays the results of the criteria you enter in the search fields.

Creates a new instruction record card to enter the client’s details.

Displays a list of the most recently entered Instructions within the last 60 days.

Displays a list of all instructions that do not have a complete date on the Product tab of the record card.

Displays all cases that have been completed within the last 60 days.

Gives you the ability to compile information for management purposes.

Access to search Land Registry data on postcode giving you the sold price for properties since 2000.

This opens a utility to reproduce the EPC graph required for the Sale Particulars.

Opens the Utilities Menu.

Displays tips and the system functions.

Allows you to correctly exit and close the Web Browser.
UTILITIES MENU

Displays system installation notes and system requirements.

Installs the ActiveX controls required for system functions e.g. Uploads

IMPORTANT NOTE

Before carrying out the procedure below you must ensure that you have “Administrator Rights” on your computer as the function below will need to download and write files to the All Users directory on your local computer.

Click on the "Install ActiveX" button, this will check to see if this has already been installed, and if older, will upgrade it. If it has not been installed it will automatically download and install (security settings permitting - see Browser Security). This may take a minute or two so please be patient.

Once the ActiveX control has been downloaded and installed successfully the second stage in the installation process will start – on the screen you will see the progress of this and during this process various windows (with black backgrounds) may open and close automatically which shows that the download has completed and is being unpacked to your PC.

There may be short periods of inactivity, be patient, do not press anything until this process has completed. **Note:** At any time you can return to the installation page and check that your system is correctly set up and working by re-visiting the "Support Information" page to confirm the current browser environment and the version of the ActiveX control that has been installed.
Support Information
Provides information on system and browser versions.

Change Password
Allows users to change their password, only if they know the existing.

Edit Site Details
Edit the site details for a user's pre-filled data e.g. estate agents/search provider details.

User Maintenance
Create new/edit existing user login and security details.

Suppliers/Clients
Enables you to create new suppliers and clients on your system for users.

Main Menu
Returns you to the Main Menu.
ADDING A NEW CASE

To create a new Home Information Pack you will need to select “Add New Case” from the main menu.

Product Tab

Instruction Information

This section will automatically populate from the data entered in the “Edit Site Details” option on the Utilities Menu. If the data does not populate then you can select the “blue cube” on the right of Instruction From and a list of all clients will appear which you can select from. The only fields you will need to fill-in are your contact name and a reference.

Pack Type

Selecting one of the radio buttons for the pack type will define the product that the client wishes to order. By hovering over the info icon a description of the product will be displayed. The standard software comes with the following default pack types.

**Standard / Bronze** = (Index, Energy Performance Certificate, Sale Statement, LR Title and Plan, Water & Drainage and Local Authority Search, Leasehold Documents if applicable)

**Silver / Gold** = (Index, Energy Performance Certificate & Home Condition Report, Sale Statement, LR Title and Plan, Water & Drainage and Local Authority Search, Leasehold Documents if applicable)

To re-define products or add descriptions you will need to contact the customer support team.
Pack Status

If you want to be able to “Cancel” the Home Information Pack or mark the pack as “Ready” or as “Awaiting Payment”, simply select from the drop down box. The “Cancel” status will cancel the instruction and fill in the “Case Completed” option. If it is set to “Awaiting Payment” then no instructions will be sent out when creating the case. When the status is changed from “Awaiting Payment” to a blank status then instructions will then be sent out to the providers on the provider’s page. The status can only be changed by a Power User.

If you need to re-enable the instruction, click on the “Uncomplete” button next to the completed date.

Additional Documents

Selecting these radio buttons allows the vendor when ordering their HIP to specify whether they wish to include optional documents. The default is set to exclude and this will update the document index if changed.

HIP Format

This is to specify the preferred format for the HIP to be delivered in and can be set as default within the “Edit Site Details” for each client login.
**Property Tab**

This section will need to be completed with the applicant(s) details. By entering in a mobile number and / or email address the applicant(s) will receive automated SMS and / or email updates as their Home Information Pack progresses.

Enter the postcode of the property and then select the house symbol beside the property postcode. The address will be looked up and the results will be displayed in a dialog window. Select the correct property address, this will populate the full address and also the UPRN (Unique Property Reference Number) will be retrieved.

**Occupier Information**

If the property has occupiers who are not the owners of the property, selecting the “**check box**” will un-grey the occupiers information section to allow their details to be entered.

**Correspondence Address**

If the seller is not resident at the property, selecting the “**check box**” will un-grey the correspondence information section to allow details to be entered.

**Property Details**

In this section you will need to complete the property type, style and tenure by selecting one option from the drop down boxes to the right of each field. You will also need to complete the sale price, construction status and number of bedrooms. Fields that are mandatory will be marked with a red * upon creating the instruction and you will be returned to the missing data item.
Saves and creates the initial instruction once you have entered the correct information, this will initiate all instructing emails to the Search Provider and Domestic Energy Assessor if selected.

Exits from the case record without saving any changes

The following buttons will not become available until the instruction has been created.

- **Create**
  
  Saves and creates the initial instruction once you have entered the correct information, this will initiate all instructing emails to the Search Provider and Domestic Energy Assessor if selected.

- **Quit**
  
  Exits from the case record without saving any changes

- **Status**
  
  Takes you to the case status screen to view the progress log

- **Documents**
  
  Takes you to the case documents screen to edit, upload, view and print attached documents
**Providers Tab**

This page contains the details of the suppliers that are going to provide certain components of your HIP.

**Search Provider**

This will notify the selected search provider to carry out Land Registry Individual Register, Land Registry Title Plan Searches, Local Authority and Local Land Charges and Water and Drainage Enquiries Searches.

**Home Inspector**

This will instruct the selected Home Inspector to carry out the EPC either via an email or by the Quest SPN system.

**IMPORTANT NOTE**

You can only instruct via the Quest SPN system if the Home Inspector is using a Quest solution and that they have a valid SPN number.

**Print Provider**

Once the pack has been assembled and that the quality assurance date (QA Print Date) has been filled in, on the documents page click on **Notify Print**, this will then notify the selected printing provider.
Estate Agent
If the introducer user group is set to User, usually a Solicitor, they can nominate an Estate Agent. The Estate Agent will get an automatic email when the HIP is complete.

Conveyancer
The Conveyancer will receive an email on creation of the HIP advising they have been nominated by the Vendor. Email updates are also sent to the Conveyancer when the HIP has been completed with access to the online PDF.

Legal Overview
An email is sent when the "Legal Notify" is selected on the documents screen after the HIP has been assembled. Allows a chosen party to complete a legal summary template and sends back into the HIP. They can also see the assembled pack online.

Selecting a Provider
Selecting the “blue cube” to the right of the providers section will launch a pop-up window with a list of available suppliers.

Select the supplier that you wish to use and the details will be populated into the correct fields.

IMPORTANT NOTE
If you are going to always use the same search provider and home inspector, this information can be pre-populated from the details in the “Edit Site Details” screen.

If you do not wish to instruct the searches or any other suppliers on the initial creation of the case then make sure that the Status is set to Awaiting Payment.
**Misc Tab**

**Management Company Information**

For Leasehold properties the Management Company Information section “check box “ will automatically be selected and un-grey, you will then be able to complete the details. For Freehold properties that may also have a management company, you can select the “check box” and the section will un-grey allowing you to enter the details. If an email address is entered it will generate an instruction to the management company requesting the required documents for your HIP e.g. copies of 3 years accounts and the contract. The management company will be able to return documents to the case by replying to the emails and attaching documents in either JPEG / PDF format.

**Notes**

There is a section on this page for you to make any notes on the case. These notes will not be sent to any other systems or suppliers and are for your information only.

**Web passwords**

The system will generate a reference, a Vendor password and a Buyer password upon creation of the instruction. An e-mail will then be sent to the Vendor automatically with the website and the Vendor password, this will enable them to view HIP’s status and their HIP as a pdf. Once “Notify Buyer” is selected on the documents page the Buyer will get an email with the website and the Buyer password, this enables them to view their HIP as a pdf. If a Vendor or Buyer contacts you by phone you can give them the website - [http://domainname.uksv.net](http://domainname.uksv.net) and relevant password which you will find on the Misc page.

**Alternative delivery address**

This is to be completed if you would like the HIP delivered to a different address rather than Instruction From.
**Fees Tab**

The system has a component pricing engine which uses the fees for all suppliers to build the most competitive price for each HIP. *(To set up fees, see Suppliers & Clients on page 34)*

**Scale Fee** – This is total of EPC, Management Agent and Solicitor Fee. The Total Fee is excluding VAT

**Search Fee** - This includes VAT as search packages contain non vatable disbursements.

To calculate a fee the instruction must have the sale price, pack type and providers populated. Once these are completed you can select calculate. The system will then lookup the fee table and calculate the correct VAT. If you wish to add a NON VAT disbursement then key in a value and the fee will automatically re-calculate.

**Payment**

Your client can decide between two payment options, either Seller/Vendor pays or Agent/Solicitor pays. This can be restricted within your client’s record in the client database. “Agent/Solicitor pays” means that you as a pack provider will need to chase payment directly from the Estate Agent instructing you to produce the HIP. Seller/Vendor pays is linked to an online payment facility where the seller can choose from either upfront or deferred payment terms. Once the payment has been accepted the system will retrieve an authorisation code and automatically change the status from “Awaiting Payment” to a blank status. When the case is updated the instruction e-mails will automatically be sent out.
Finance Option

Close Payment Services are able to provide a number of payment/funding options including:
- Immediate debit/credit card collection
- Deferred payment

Payment/funding agreement is in place between the “seller” and Close Payment Services, therefore no recourse to the HIP provider.

Non regulated funding available, therefore no requirement for a Consumer Credit License

Close Payment Services is a division of Close Brothers the UK’s largest independent merchant banking group

For further information please contact: John Taylor ~ Mobile: 07880 744398

Saving Instruction

Once the information on these pages has been completed you can select the “Create” button at the top left of the screen, this will save the details you have entered. A message will briefly appear saying “Updating”. The system will then generate instructions by email to the Search Provider, Land Registry, Management Company if required and raise an SPN instruction to the Inspector.

It will send an SMS Text message and/or email to the Seller confirming the creation of the HIP instruction. The system will then take you to the case “Status” screen where it will show a detailed log of the instructions it has generated.
CASE STATUS SCREEN

This screen shows a detailed date and time log of all updates and activity on the case. To access this screen you can select the Status button at the top of the instruction or beside the address on the database tramlines. You can change the view on this page by selecting one of the options from the drop down menu at the top of the screen. The views are listed below.

- Show All
- Hide Emails / SMS
- Instructions
- PDFs Received

The log is to ensure that you can track any changes made to the case and documents that have been attached. Information on this page cannot be edited by any users.

To add status messages, enter text in the field to the right of the Add Status button and then select “Add Status”. This will then add the status to the list and refresh the page.

Selecting the “Case” button at the top left of the screen will return you to Page 1 of the instruction.

Selecting the “Documents” button at the top of the screen will take you to the documents screen.

Selecting the “Quit” button at the top right of the screen will make a message briefly appear saying “Updating” and then will return you to the Main Menu.
This screen shows all documents that are in your HIP. To access this screen you can select the Documents button at the top of the instruction or beside the address on the database tramlines. It incorporates a symbol and colour system to easily show document status.

- Not required / Awaiting Instruction
- Instructed / Awaiting Completion
- Received / Completed

From this screen the HIP can be assembled at any point in its production by selecting "Assemble PDF". This will build a PDF with all the pack components at that point; any components which may still be missing will have a page inserted saying "section unavailable".

The Documents screen has the following functions within the "Action" column: -

"Upload to Section" Upload scanned Jpeg / PDF documents to a specific section
"Edit" Edit / Fill-in the attached document e.g. Sale Statement.

The following functions can only be seen by the admin user.

"Change Section" Move an attachment to another section on the same case reference
"Move To Case" Move an attachment to another case reference
"Delete" Delete an attachment.
Attaching a Document Automatically

As and when the instruction is created and the emails are sent out to the relevant parties, the recipient is able to email the system back and it will automatically attach the document back to the relevant section. The system looks for key words within the body/subject of the email. Below is the procedure of how to send the document to the system:

1 - Quote the SystemRef HP?????? in the subject
2 - Add the key word in the body or subject of the email. e.g. (Water and Drainage)
3 - Attach the file as a JPG or PDF
4 - Send the email to quest1@uksv.net

Please ensure that all results are formatted as PDF or JPG keeping the file size small. You do not need to use the code, the software reads your email finds "Key words" and then assigns it to the correct section.

IMPORTANT NOTE

The Key words are NOT case sensitive.

The System will scan the email and find the FIRST key word and attach it to that section, please ensure that the first key word is for the correct section.

KEY WORDS - General

<table>
<thead>
<tr>
<th>KEY WORD</th>
<th>SECTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>sale statement</td>
<td>Sale Statement</td>
</tr>
<tr>
<td>statement of sale</td>
<td>Sale Statement</td>
</tr>
<tr>
<td>summary terms of sale</td>
<td>Sale Statement</td>
</tr>
<tr>
<td>summary of terms of sale</td>
<td>Sale Statement</td>
</tr>
<tr>
<td>home condition report</td>
<td>Home Condition Report</td>
</tr>
<tr>
<td>HCR</td>
<td>Home Condition Report</td>
</tr>
<tr>
<td>energy performance</td>
<td>Energy Performance Certificate</td>
</tr>
<tr>
<td>EPC</td>
<td>Energy Performance Certificate</td>
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<tr>
<td>RdSAP</td>
<td>Energy Performance Certificate</td>
</tr>
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<td>Home Use Form</td>
</tr>
<tr>
<td>seller’s property info</td>
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</tr>
<tr>
<td>seller property info</td>
<td>Home Use Form</td>
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<tr>
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<td>Home Contents Form</td>
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<tr>
<td>Home Contents</td>
<td>Home Contents Form</td>
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<tr>
<td>fittings, fixtures and contents</td>
<td>Home Contents Form</td>
</tr>
<tr>
<td>fittings, fixtures &amp; contents</td>
<td>Home Contents Form</td>
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<tr>
<td>fittings fixtures and contents</td>
<td>Home Contents Form</td>
</tr>
<tr>
<td>fittings fixtures &amp; contents</td>
<td>Home Contents Form</td>
</tr>
<tr>
<td>legal condition report</td>
<td>Legal Summary</td>
</tr>
<tr>
<td>legal summary</td>
<td>Legal Summary</td>
</tr>
<tr>
<td>Floor Plan</td>
<td>Floor Plan</td>
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<tr>
<td>FLP</td>
<td>Floor Plan</td>
</tr>
<tr>
<td>Predicted Energy Assessment</td>
<td>Predicted Energy Assessment</td>
</tr>
<tr>
<td>Predicted EPC</td>
<td>Predicted Energy Assessment</td>
</tr>
<tr>
<td>The Lease</td>
<td>The lease, being either: an “official” copy the original lease or a true copy of it; or an edited information document</td>
</tr>
<tr>
<td>A copy of the lease</td>
<td>The lease, being either: an “official” copy the original lease or a true copy of it; or an edited information document</td>
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<tr>
<td>---------------------</td>
<td>------------------------------------------------------------------------------------------------------</td>
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**KEY WORDS - The Physical Condition of the Property**

<table>
<thead>
<tr>
<th>KEY WORD</th>
<th>SECTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Uncommenced New Homes warranty.</td>
<td>Uncommenced new homes warranty with cover note</td>
</tr>
<tr>
<td>Commenced new homes warranty.</td>
<td>Commenced new homes warranty</td>
</tr>
<tr>
<td>Other Warranties.</td>
<td>Other warranties</td>
</tr>
<tr>
<td>Property not physically complete.</td>
<td>Report on a property not physically complete</td>
</tr>
<tr>
<td>Evidence of safety, construction, repair or maintenance.</td>
<td>Evidence of safety, construction, repair or maintenance</td>
</tr>
</tbody>
</table>

**KEY WORDS - Land Registry**

<table>
<thead>
<tr>
<th>KEY WORD</th>
<th>SECTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Land Registry Plan</td>
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</tr>
<tr>
<td>LR Plan</td>
<td>Land Registry title plan</td>
</tr>
<tr>
<td>Land Registry Title</td>
<td>Land Registry individual register</td>
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<tr>
<td>Land Registry</td>
<td>Land Registry individual register</td>
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<tr>
<td>LR Title</td>
<td>Land Registry individual register</td>
</tr>
<tr>
<td>Land Registry copies of documents referred to in the individual register</td>
<td>Land Registry copies of documents referred to in the individual register</td>
</tr>
<tr>
<td>Official search of Land Registry index map</td>
<td>Official search of Land Registry index map</td>
</tr>
<tr>
<td>Deduction of title documents map</td>
<td>Deduction of title documents map</td>
</tr>
<tr>
<td>Leases, tenancies or licences for properties where part of the property in a sub-divided building not sold with vacant possession</td>
<td>Leases, tenancies or licences for properties where part of the property in a sub-divided building not sold with vacant possession</td>
</tr>
</tbody>
</table>

**KEY WORDS - Search Reports**

<table>
<thead>
<tr>
<th>KEY WORD</th>
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<td>Water and drainage enquiries</td>
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<td>Con29dw</td>
<td>Water and drainage enquiries</td>
</tr>
<tr>
<td>Con29</td>
<td>Local Authority and Local land charges</td>
</tr>
<tr>
<td>Local Authority</td>
<td>Local Authority and Local land charges</td>
</tr>
<tr>
<td>Search</td>
<td>Local Authority and Local land charges</td>
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<td>Other extractions</td>
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</tr>
<tr>
<td>Telecommunications</td>
<td>Telecommunications</td>
</tr>
<tr>
<td>Utilities</td>
<td>Utilities</td>
</tr>
<tr>
<td>Transport</td>
<td>Transport</td>
</tr>
<tr>
<td>Repairing Liabilities</td>
<td>Repairing liabilities</td>
</tr>
<tr>
<td>Other Search Report for the Property</td>
<td>Other search reports for the property</td>
</tr>
<tr>
<td>Search Reports for other Properties</td>
<td>Search reports for other properties</td>
</tr>
</tbody>
</table>
Attaching a Document Manually

To use this function you must have already run the “Install ActiveX” from the “Utilities” menu. This function will check for any JPEG / PDF files that have been saved in the following folder:

My Documents\HIPUPLOAD

**IMPORTANT NOTE**

The system requires an outbound connection to the internet to allow uploading of documents to the system to take place. Normally outbound connections to the internet are not restricted, if yours are please inform your IT system administrator to allow outbound port 49165 TCP.

To upload a document, select the “Upload to Section” link, on the documents screen beside the section you wish to attach the document to. You will see this window appear.

If the system finds a JPEG / PDF file in the HIPUPLOAD folder it will format the image, attach it to the document section you selected then remove it from the folder. The window will then change to show the following.

The “OK” button will then un-grey and you can then select “OK” to close the window. This will then show the documents screen with the uploaded file highlighted with a green tick. You can view the file that has been uploaded by selecting the PDF link in the Documents (click to view) column.

If there are no JPEG / PDF files in the correct upload folder then this message will appear.

If you are continuing to get this message then you should check that there are images in the correct upload folder and that the ActiveX function has been installed.
Move a Document to Another Section

This function allows you to move documents to a different section on the same case. It will also log any movement of these documents on the Status screen so you can track them.

Select the “Change Section” link against the required document and the following screen will appear.

![Change Section Screen]

You will need to select the new section to move the document to by using the drop down arrow to the right of the box. Once you have selected the correct section you will need to select the “Change Section” button.

If you try and select the same section the document is already in, the system will display the following error. By selecting “OK” you will return to the change section window.

![Error Message]

If you wish to cancel this process you can select the “Quit” button and you will return to the Documents screen.
Move a Document to Another Case

This function allows you to transfer a document from one case to another; it will also log the moving of documents on the Status screen.

Selecting “Move To Case” will display the following window.

You will need to key the reference number of the case you wish to move the document to e.g. HP000054 within the Move To Case field. Once you have keyed in the correct reference, click the “Move PDF” button. The window will then close and you will return to the updated document screen. The section the document was in will now appear red.

Edit a Document

This function will open any document templates that require completion by the agent or seller. The document will be loaded in a new window where you will be able to print the document or key in any information required on the seller's behalf, select “Edit” to load the document.

IMPORTANT NOTE

You will not be able to edit any of the Energy Performance, Home Condition Reports, Searches, Land Registry or Management Company documents using this function.

When the document is complete you can view it as a PDF and it will appear with a green tick on the Documents screen.
Edit Index

You have the ability to add or remove certain sections of the Home Information Pack. Once you have changed the index, this will then display the section on the documents screen. Also in the edit index screen you have the ability to give a reason why the document for that section is not included and the steps that are being taken to obtain the document.

Once you have changed the Index it is important to click on update at the bottom for the changes to be saved.
SEARCHING FOR AN EXISTING INSTRUCTION

From the Main Menu you will need to key in the details you have to search for within one of the seven criteria fields shown below. Multiple criteria can be entered to narrow the results.

<table>
<thead>
<tr>
<th>Seller Surname</th>
<th>Post Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>Application Ref</td>
<td>House Name</td>
</tr>
<tr>
<td>Instruction From</td>
<td>Road No.</td>
</tr>
<tr>
<td>Status</td>
<td>Road Name</td>
</tr>
<tr>
<td>System Ref</td>
<td></td>
</tr>
</tbody>
</table>

Once you have entered the search criteria, click the “Search” button and the screen will then change to show the results similar to below.

You can view any of the cases displayed in the results by selecting the address. To return to the menu you can select the “Exit” button at the top right of the screen.

If more than 25 results are found, a message will appear at the top of the screen prompting to narrow your search.
PRICE CHECK

This function gives you free access to the Land Registry data for price comparables. The system sorts the data into the closest distance to the postcode searched for and then in the latest sold date first. Selecting the “Price check” button on the main menu will launch a new window as shown below.

IMPORTANT NOTE

The window may not appear if you have not configured your pop-up blocker.

Key in the postcode you wish to search for and select the property type using the drop down arrow on the right. Click “Search” and the best 60 results will be displayed, subject to available data. Land Registry provides updated data on a monthly basis.
EPC GRAPH FOR SALE PARTICULARS

This function gives you access to a utility to reproduce the Energy Performance Graph required for the property sale particulars. Enter the four ratings and select the graphic size and file format and then click “Update”.

To save the image, right click on the graphic and select “save picture as”, then select the location on your computer that you wish to store the image and click “save”.

SUPPLIERS / CLIENTS

You will need to be logged into the system as an Admin user to be able to see this option.

Selecting “Suppliers and Clients” from the Utilities Menu will enable you to set up the suppliers (e.g. Home Inspectors and Search Providers) for your clients (e.g. Estate Agents and Solicitors). The following screen will be displayed.

To search for an existing supplier/client key, in the data into either of the search boxes and then select “Search”. The system will then display the results in the area below. This search function allows you to type in multiple criteria with a space between e.g. “Inspector Bracknell” this would then find all records containing both words.

To edit or view the information in the results, click on the name of the required case. The case will then appear in a new window.
ADDING A SUPPLIER

To create a new supplier select the “New” button in the suppliers section. A new window will be launched as shown below.

In the code box click on the drop down arrow and select one of the options – (Search Provider, Home Inspector, Print Provider, Legal Condition Report or Hold.) Then complete the rest of their company details in the record.

Setting Postcode Coverage

The postcode coverage section is to enable the system to validate that the supplier covers that area. All different postcodes must start on a new line as shown in the diagram above. The postcodes can be set up in the following ways.

* = National coverage
RG * = They cover the whole of the RG postcode
RG 1,4,8,10 = They only cover specific postcode area within RG
RG 1-15 = They cover a range within the RG area
Suppliers Instruction Method

The system will currently instruct suppliers either by email or the SPN (Secure Panel Network). If you wish to instruct via email then just enter the suppliers email address.

To instruct via the SPN you will need to ask the supplier for their SPN ID. The only suppliers who can be instructed via the SPN are Energy Assessors, Home Inspectors or Panel Managers of both. If an SPN number is entered the system will ignore the email address.

IMPORTANT NOTE

By instructing with the SPN, the Energy Performance Certificate (EPC) and or Home Condition Report (HCR) will be automatically received from the inspector. This will save on the time to upload the document.

Suppliers Fees Set up

To set up the supplier’s fee tables for the fee calculator to use you will need to use the following layouts. All fee tables use thresholds when using a property value so the number you enter is the up to limit.

You can have any combination (in any order) of the following six fee scale components separated by a hyphen – you need to include the fee scale components that are required:

<Purchase Price> e.g. 400000.00 (up to and including)
<Pack Type> e.g. ST / BR / SI / GO
<Bedroom Count> e.g. B4 (4 bedrooms. For 4 bedrooms and more you can use B4+)
<Job Type> e.g. EP/HC
<Print Copies> e.g. P1 (1 printed copy. For 2 printed copies and more you can use P2+)
<Tenure> e.g. FH / LH / CH / UN

This is useful because the client can order their fee scale rules according to the working practice that makes most sense for them, e.g. they may break it up by bedroom followed by price and group together all of the 4 bedroom fee scale rules together.

The most restrictive rules should be first because as soon as a complete fee scale line is matched it is used.

This is now much more flexible than before as a client can use any/all 6 fee components.
Typical Fee Set up Example

**Fees based on pack product type <Type> <FEE>**

This fee table would be used for a search supplier and these fees would include VAT already

ST  100.00  
BR  50.00  
SI  200.00  
GO  300.00  

**Fees based on Property Value <Value> <FEE>**

This fee table is to be used for suppliers that just have a scale fee on property value and is the NET fee.

100000  100.00  
200000  110.00  
300000  120.00  
999999  200.00  

**Fees based on Property Value and Report Type <Value>-<Report> <FEE>**

The following fee table below would generally be used in the Inspectors supplier record when providing EP- Energy Performance Certificates or HC- Home Condition Reports inc EPC. These fees would be set up as NET fees and the system will add VAT when it calculates the total pack cost.

100000-EP  70.00  
100000-HC  200.00  
200000-EP  120.00  
200000-HC  300.00  
999999-EP  200.00  
999999-HC  300.00  

When setting up fees for suppliers that just have a flat rate fee then you will need to enter a high threshold and then the fee. e.g. 9999999 100.00

**Complex Example of a Fee Structure**

B4-400000-HC-ST 300.00  
For example, is the same fee entry as the following:  
HC-ST-B4-400000 300.00  

This complex example above shows 4 bedrooms with the purchase price of 400000 or less who has a Home Condition report and is a standard pack.

Check the details are correct then select the “New” or “Update” button and the case will be saved, you will then return to the previous screen. By selecting “Quit” no changes will be saved.
**Adding a Client**

To create a new client select the “**New**” button in the Clients section. A new window will be launched as shown below. You will need to complete the company name and address details.

**Login ID**

The user name that has been set up within the User Maintenance will need to be added here.

**IMPORTANT NOTE**

It must be the whole login name including your domain. (e.g. questhipcolin is correct - colin would be incorrect).

**Account Ref**

The Account Ref field is for you to allocate a unique ID / Reference to help you identify your client when billing.

If you prefix the account ref with C- then this will enable the Agent/Solicitor pays function when your client is entering on new HIP instructions.

If you prefix the account ref with X- then this will enable the conveyance quote software, if your system has this function.

Currently the Agent/Solicitor is the default option. To change this so that the Seller/Vendor is the default option add an S after the C eg. CS-

**Admin Fee**

This is to allow you to make a margin on the cost of each HIP. This fee should be enough to cover all fees that are not included in the supplier’s database.
LINKING SUPPLIERS & CLIENTS

For clients to be able to see the suppliers when entering a new instruction you need to build database relationships between them.

Highlight the supplier by selecting the blue box to the left of the supplier’s database entry. Then click on the name of the client in the client’s database, the following window will appear.

Within this window select the “Add Supplier” button and the link between this client and the supplier being added will be made. The system will then return you to the previous screen.
ADDING A NEW USER

To add a new user onto the system you will need to select "User Maintenance" from the Utilities Menu. The screen below will then appear.

There are three ways that users can be set up.

1 - Normal Estate Agent or Solicitor login would just be: -
  <domain name><up to 6 Alpha characters> e.g. questhipabc

2 - If a client needs to have a login that can be accessed from more than one location then you can set up the login again with a suffix of a number on the end. e.g. questhipabc1
   (by adding the number the second user name can see the same cases as the first user name.)

3 - If you wish to operate a group of clients within a chain and have a management login then they must all begin in the same way.

   e.g. questhipabc – is the managers login
        questhipabcas – is the ashford branch
        questhipabc ox – is the oxford branch

   The manager’s login will see all cases entered by the other users with the login names that begin with the same prefix. You will need to enter a G in the Attributes field against the manager’s login name. e.g. questhipabc to enable the grouping function. This will able the user to instruct a HIP on behalf of their offices from their login.

   By entering the R in the Attributes field against a user will make that user Read Only. This will disable the Add New Case button on the main menu.

   If an E is entered in the Attributes field against a user, any case put on by that user will default to the status of Awaiting Payment.
The CLI is how the software authenticates the user when the login to the software. The CLI must be set up as the users telephone/mobile number or their ISP (Internet Service Providers) static IP address.

The ipaddress can be found by asking the user to open an internet browser and go to http://checkip.dyndns.org

Once you have entered all the users details in the “New User” section you can select “Add”. The screen will refresh and the user will appear on the list to the left of the page. Then select “Exit” to return to the previous screen.

Upon setting up a new client login you must remember to login as them and set up their Site Details. To do this you need to type in the login box the following:

<admin username>/<client username>
<admin password>
<yours own initials>

e.g.
questhip/questhipabc
abc
CB

Then select “logon” and go into the Utilities Menu and select “Edit Site Details”. Once you have completed the data input then select “Update”. Please refer to page 43 for more information in editing Site Details.
Adding Branding for New Users

To add branding for your client you need to ensure the graphics are in the following format:

**Site Logo**

File name must be `<login name>.gif` e.g. questhipabc.gif

Format must be a GIF file with the pixels no more than 150 high X 500 wide.

**Branded PDF Artwork for assembled HIP**

File names must be Front cover = `<login name>-cover.pdf`
Separator = `<login name>-div.pdf`
Back cover = `<login name>-back.pdf`

The requirement for branded cover pages is for A4 size (210mm x 297mm) at a resolution of 300 DPI using the RGB colour space. These should be saved as high quality PDF (with a JPEG quality setting of 80% or higher). Once the files are ready they need to be emailed to naomi.keightley@onlinequest.co.uk and then we shall upload the files to the server.

The files should be no more than 300kb in size. Any files larger than this will not be uploaded to the system, as they will make the fully assembled HIP too large, causing long download times for the consumer viewing it online.
EDITING SITE DETAILS

This enables you to edit the auto populating data for each client. You need to log in by typing / (Client username), then your password. Once logged in select the “Edit Site Details” button from the Utilities Menu and the following window will appear.

The details entered on this page will automatically populate into the fields of any new instructions this Client enters. This will save the user time if they always use the same suppliers e.g. search provider. Use the drop down boxes to select the data to be auto filled.

The user will still be able to select different suppliers from within their HIP instructions if you have set up other suppliers for them to use.

It is important that the Pack Provider Information is populated or the automatic emails that are sent out will not display your contact information.

Once all the details are completed click the “Update” button at the bottom of the screen, this will save the changes and return you to the Utilities Menu. If you wish to exit without saving any changes then select the “Utilities Menu” button at the bottom of the screen and you will return to the Utilities Menu.
REPORTS

This option will allow you to run pre-defined reports on your system to gather management information regarding the data on your system.

To run a report select the report from the list and then click on run, fill out the relevant details. After running the report the result will appear on screen. You also have the ability to print the results of your report to your local printer or export the results in a comma delimited format.

IMPORTANT NOTE

If you have any specific report requirements please contact a member of our support team.
FAQ’s

HOW DO I SET UP A NEW CLIENT?
From the main menu, click into “Utilities” then “Suppliers/Clients”.
At the bottom section, Clients, click on the “New” Button and fill in the New Client details.
Click on “New” button to save and exit.

HOW DO I SET UP A NEW SUPPLIER?
From the main menu, click into “Utilities” then “Suppliers/Clients”.
On the top section, Suppliers, click on the “New” Button and fill in the New Supplier details.
In the Postcode Coverage section, fill in the postcode areas they cover eg. RG * would cover all RG postcodes, or put an * on its own for national coverage.
Under Fee Scale you can fill in the fees they charge, please refer to page 36/37 for examples.
Click on “New” button to save and exit.

HOW DO I NOTIFY A BUYER THAT THE PACK IS READY?
Click on the “Documents” button from the Case Record.
At the top click on “Notify Buyer” and you will be asked for the name and email address of the buyer. This will then send the buyer an email with your http website, the HP reference and the buyer password. The buyer will then be able to view the completed Hip pdf from this site.

HOW DO I COMPLETE A CASE?
At the bottom of the Product page of the case, you can click on “Complete”. This will fill in today’s date in Complete Date. This will now show under the Completed Cases option on the main menu.

HOW DO I CANCEL A CASE?
At the bottom if the Product page, click on the drop down next to Pack Status. You can now mark the case as “Cancel”. This will then lock the case and fill in the case completed date.

HOW TO AUTO-POPULATE FIELDS WHEN ADDING A CASE?
If your client is associated with a particular provider you can auto-populate a new case with their details. Firstly, you need to login using the /(client username) and your password.
From the main menu go to “Utilities”, then “Edit Site Details”. Click on the blue box to fill in Source and the Providers you wish to autofill.
Click “Update” to save and exit or “Utilities” to exit without saving.
When adding a new case you will still be able to change the provider if you need to.
You will need to fill in your own details as the pack provider as this is used on the automatic emails.
TECHNICAL SUPPORT

Quest operates a very friendly technical support helpline which is open Monday to Friday 09:00 to 17:30. If you have any technical questions with the operation of this software please do not hesitate to contact us on 01344 403 400 opt 2.

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