

# Agency Pilot CRM EGI Radius Setup

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# Overview


This document was put together to guide you through the process of configuring EGI Radius for use within Agency Pilot CRM.

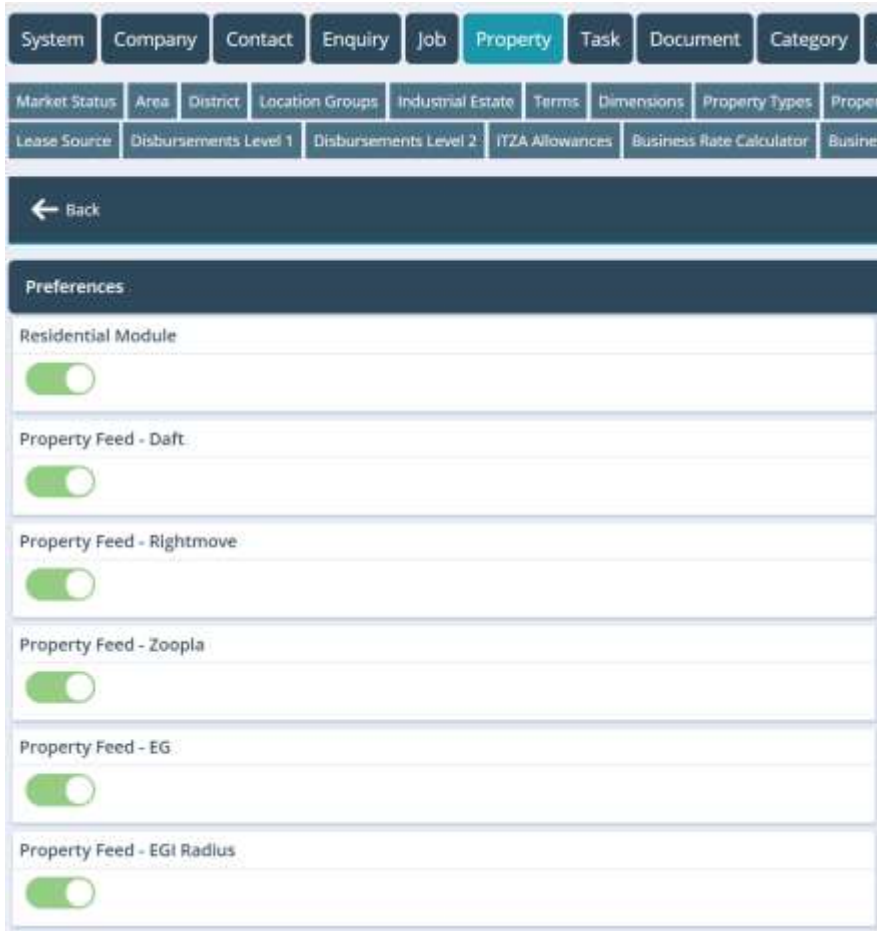
## Prerequisites

The integration requires a valid EGI Radius licence which includes the use of the Radius API. Your EGI Account Manager will provide the Alcium Helpdesk with your access credentials.

# Agency Pilot CRM configuration



Click on the  menu icon to access the system administration section of Agency Pilot CRM. Click on the [Property] tab, and expand the [Preferences] panel.



Click on the EGI Radius toggle to make it go green, then click on the save button to save the settings.



## Radius Terminology Mapping

Field labels and terminology currently defined in Agency Pilot needs to be mapped onto EGI Radius terminology. If the terminology is not mapped for each area then you may receive errors during the upload process.

### Market Status

Any market status options that are used against properties that will be in the feed will require mapping. For example, if you want to upload properties that are 'AVAILABLE' then the 'AVAILABLE' status will need mapping.

Edit	Name	Available	Default for	Task Reminders	Offices	Archived
	AVAILABLE	<input checked="" type="checkbox"/>	Default New Property	13 items	0 selected	
	AVAILABLE BY AUCTION	<input checked="" type="checkbox"/>		8 items	0 selected	
	Comparable			0 items	0 selected	
	LEASE RENEWAL			0 items	2 selected	
	LET			5 items	5 selected	

To map an equivalent, select the status from the list and click on the pen icon to edit the record.

Market Status

Name: AVAILABLE

Archived:

Status Available:

Feed Equivalents

- Property Pilot Equivalent
- AVAILABLE
- Rightmove Equivalent
- Available
- Zoopla Equivalent
- Available
- Radius Equivalent
- Available

Select the 'Radius Equivalent' drop list to select the relevant equivalent. See **Appendix 1** for Radius equivalent options.

## Terms

Any terms options that are used against properties that will be in the feed will require mapping. For example, if you want to upload properties use the leasehold term 'per annum' then the 'per annum' term will need mapping.

Delete	ID	Name	Applies To	Property Pilot Equivalent	EGPL Equivalent	Rightmove Equivalent	Zoopla Equivalent	Radius Equivalent
	8	per annum	<ul style="list-style-type: none"><li>For Sale</li><li>For Rent</li><li>Rates</li><li>Service Charge</li><li>Letting / Sale Terms</li></ul>	PER ANNUM	- No Selection -	Yearly	Per year	Per Annum

To map an equivalent, select the radius equivalent drop list against the term in the list and save the record. See **Appendix 1** for Radius equivalent options.

## Dimensions

Any dimensions options that are used against properties that will be in the feed will require mapping. For example, if you want to upload properties use the dimension 'Acres' then the 'Acres' dimension will need mapping.

Delete	ID	Name	Show On Website	Unit of Measure	Conversion Factor	Decimal Places	Used for Land	Default	Property Pilot Equivalent	EGPL Equivalent	Rightmove Equivalent	Zoopla Equivalent	Radius Equivalent
	3	Acres	<input checked="" type="checkbox"/>	Hektars	0.484	2	<input checked="" type="checkbox"/>	<input type="checkbox"/>	ACRES	- No Selection -	acres	Acres	Acres

To map an equivalent, select the radius equivalent drop list against the dimension in the list and save the record. See **Appendix 1** for Radius equivalent options.

## Property Types

Any property type options that are used against properties that will be in the feed will require mapping. For example, if you want to upload properties use the property type 'Showroom' then the 'Showroom' property type will need mapping.

Delete	ID	Name	Dimension	Property Pilot Equivalent	EGPL Equivalent	Investment	Development	Business	Rightmove Equivalent	Zoopla Equivalent	Radius Equivalent	Archived
	129	Showroom	Sq Ft	SHOWROOM	Retail / Trade Park	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Showroom	Retail premises	Retail (All) - Showrooms - General	<input type="checkbox"/>

To map an equivalent, select the radius equivalent drop list against the property type in the list and save the record. See **Appendix 1** for Radius equivalent options.

## Lease Types

Any lease type options that are used against properties that will be in the feed will require mapping. For example, if you want to upload properties use the lease type 'Internal Repairing and Insuring' then the 'Internal Repairing and Insuring' lease type will need mapping.

Delete	ID	Name	Radius Equivalent	Archived	Order
	310	Internal Repairing and ins.	RL	<input checked="" type="checkbox"/>	

To map an equivalent, select the radius equivalent drop list against the term in the list and save the record. See **Appendix 1** for Radius equivalent options.

## Lease Transaction Types

Any transaction type options that are used against properties that will be in the feed will require mapping. For example, if you want to upload transactions and you record use the transaction type 'Sub Letting' then the 'Sub Letting' transaction type will need mapping.

Delete	Name	Radius Equivalent	Archived	Order
	License	License	<input checked="" type="checkbox"/>	
	Sub Letting	Sub letting	<input checked="" type="checkbox"/>	

To map an equivalent, select the radius equivalent drop list against the term in the list and save the record. See **Appendix 1** for Radius equivalent options.

## Categories

During the setup and configuration, a number of property categories are setup to tag properties with various data items. When amending property information and selecting the categories list a parent category called 'EGI Radius Feed' will have a number of sub-categories covering the following areas.

EPC Rating  
Amenities  
Grade of Space

See **Appendix 1** for Radius equivalent options.

## Configuration Types and Mandatory Fields

The Radius uploader covers the following configuration types:

Availability – For uploading available properties

Letting – For uploading letting deals

Occupation Sales – For uploading occupation sales transactions

Investment Sales – For uploading Investment sales transactions

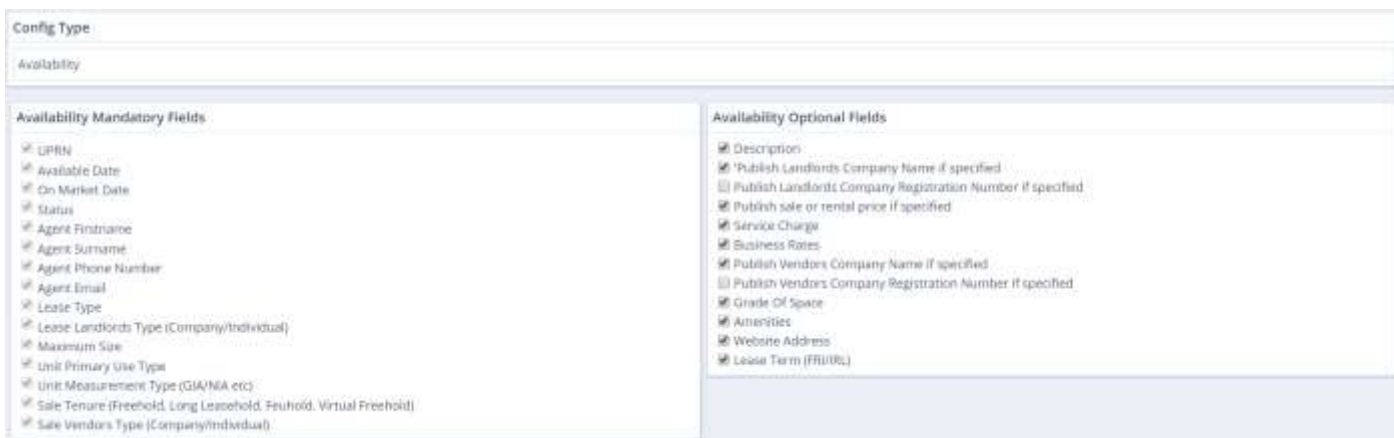
For each configuration type mandatory fields are pre-selected and optional mandatory fields can be defined.

A system administrator can setup which fields you wish to upload to Radius by accessing the menu Administration->Property->EGI Radius Feed



### Availability Configuration Type

Select the config type 'Availability' to define the configuration for uploading available properties. The availability mandatory fields will automatically be required when entering properties because they are mandatory on Radius.



## Availability Optional Fields

Description	Select this option if you want to make the property description mandatory
Publish Landlords Company Name if specified	Select this option if you want to publish the landlords company name. If this is not selected 'unknown' will be sent to Radius
Publish Landlords Company Registration Number if specified	Select this option if you want to publish the registration number.
Publish sale or rental price if specified	Select this option if you want to publish the sale or rental price.
Service Charge	Select this option if you want to make the property service charge mandatory
Business Rates	Select this option if you want to make the property business rates mandatory
Publish Vendors Company Name if specified	Select this option if you want to publish the vendors company name. If this is not selected 'unknown' will be sent to Radius
Publish Vendors Company Registration Number if specified	Select this option if you want to publish the registration number.
Grade Of Space	Select this option if you want to make the grade of space category mandatory
Amenities	Select this option if you want to make the amenities category mandatory
Website Address	Select this option if you want to make the property website address mandatory
Lease Term (FRI/IRL)	Select this option if you want to make the property lease type mandatory



## Lettings Configuration Type

Select the config type 'Letting' to define the configuration for uploading letting transactions. The letting mandatory fields will automatically be required when entering lettings transactions because they are mandatory on Radius.

Config Type	
Letting	
<b>Letting Mandatory Fields</b> <ul style="list-style-type: none"> <li><input checked="" type="checkbox"/> UPRN</li> <li><input checked="" type="checkbox"/> Transaction Date</li> <li><input checked="" type="checkbox"/> Acquiring Agent / Disposing Agent</li> <li><input checked="" type="checkbox"/> Agent Firstname</li> <li><input checked="" type="checkbox"/> Agent Surname</li> <li><input checked="" type="checkbox"/> Agent Phone Number</li> <li><input checked="" type="checkbox"/> Agent Email</li> <li><input checked="" type="checkbox"/> Lease Transaction Type</li> <li><input checked="" type="checkbox"/> Lease Landlord Type (Company/Individual)</li> <li><input checked="" type="checkbox"/> Lease Tenant Type (Company/Individual)</li> <li><input checked="" type="checkbox"/> Lease Rent</li> <li><input checked="" type="checkbox"/> Total Size Occupied</li> <li><input checked="" type="checkbox"/> Unit Primary Use Type</li> <li><input checked="" type="checkbox"/> Unit Measurement Type (GIA/NIA etc)</li> </ul>	<b>Letting Optional Fields</b> <ul style="list-style-type: none"> <li><input checked="" type="checkbox"/> On Market Date</li> <li><input type="checkbox"/> Publish Landlords Company Name if specified</li> <li><input type="checkbox"/> Publish Landlords Company Registration Number if specified</li> <li><input type="checkbox"/> Publish Tenants Company Name if specified</li> <li><input type="checkbox"/> Publish Tenants Company Registration Number if specified</li> <li><input type="checkbox"/> Publish Tenants Company Sector if specified</li> <li><input checked="" type="checkbox"/> Lease Type (FRI/IRL)</li> <li><input checked="" type="checkbox"/> Lease Length</li> <li><input checked="" type="checkbox"/> Lease Start Date</li> <li><input checked="" type="checkbox"/> Lease End Date</li> <li><input checked="" type="checkbox"/> Amenities</li> <li><input checked="" type="checkbox"/> Grade of Space</li> <li><input type="checkbox"/> Publish Business Rates if specified</li> </ul>

## Lettings Optional Fields

On Market Date	Select this option if you want to make the on the market date mandatory. This will default to the date registered or the last date the property was made available.
Publish Landlords Company Name if specified	Select this option if you want to publish the landlords company name. If this is not selected 'unknown' will be sent to Radius
Publish Landlords Company Registration Number if specified	Select this option if you want to publish the registration number.
Publish Tenants Company Name if specified	Select this option if you want publish the tenants company name. If this is not selected 'unknown' will be sent to Radius
Publish Tenants Company Registration Number if specified	Select this option if you want to publish the registration number.
Publish Tenants Company Sector if specified	Select this option if you want to publish the company sector. This information can be recorded by using the companies house integration.
Lease Type (FRI/IRL)	Select this option if you want to make the transaction lease type mandatory
Lease Length	Select this option if you want to make the lease length mandatory

Lease Start Date	Select this option if you want to make the lease start date mandatory
Lease End Date	Select this option if you want to make the lease end date mandatory
Amenities	Select this option if you want to make the amenities category mandatory
Grade Of Space	Select this option if you want to make the grade of space category mandatory
Publish Business Rates if specified	Select this option if you to publish the business rates information

## Occupation Sales Configuration Type

Select the config type 'Occupational Sales' to define the configuration for uploading occupational sales transactions. The occupation sales mandatory fields will automatically be required when entering occupational sales transactions because they are mandatory on Radius.

## Occupational Sales Optional Fields

On Market Date	Select this option if you want to make the on the market date mandatory. This will default to the date registered or the last date the property was made available.
Publish Vendors Company Name if specified	Select this option if you want to publish the vendors company name. If this is not selected 'unknown' will be sent to Radius
Publish Vendors Company Registration Number if specified	Select this option if you want to publish the registration number.
Publish Purchasers Company Name if specified	Select this option if you want to publish the purchasers company name. If this is not selected 'unknown' will be sent to Radius
Publish Purchasers Company Registration Number if specified	Select this option if you want to publish the registration number.
Publish Purchasers Company Sector if specified	Select this option if you want to publish the company sector. This information can be recorded by using the companies house integration.
Amenities	Select this option if you want to make the amenities category mandatory
Grade Of Space	Select this option if you want to make the grade of space category mandatory

## Investment Sales Configuration Type

Select the config type 'Investment Sales' to define the configuration for uploading investment sales transactions. The investment sales mandatory fields will automatically be required when entering investment sales transactions because they are mandatory on Radius.

## Investment Sales Optional Fields

On Market Date	Select this option if you want to make the on the market date mandatory. This will default to the date registered or the last date the property was made available.
Publish Vendors Company Name if specified	Select this option if you want to publish the vendors company name. If this is not selected 'unknown' will be sent to Radius
Publish Vendors Company Registration Number if specified	Select this option if you want to publish the registration number.
Publish Purchasers Company Name if specified	Select this option if you want to publish the purchasers company name. If this is not selected 'unknown' will be sent to Radius
Publish Purchasers Company Registration Number if specified	Select this option if you want to publish the registration number.
Publish Purchasers Company Sector if specified	Select this option if you want to publish the company sector. This information can be recorded by using the companies house integration.
Amenities	Select this option if you want to make the amenities category mandatory
Grade Of Space	Select this option if you want to make the grade of space category mandatory

## **Appendix 1 – Market Status Equivalents**

Available  
Under Offer  
ConvertedToDeal  
Withdrawn  
Pending

## **Appendix 1 – Terms Equivalents**

SqM  
SqFt  
PerAnnum  
Acres  
Hectares

## **Appendix 1 – Dimension Equivalents**

SqM  
SqFt  
Acres  
Hectares

## **Appendix 1 – Property Type Equivalents**

Assembly & Leisure (D2) - Bingo Hall  
Assembly & Leisure (D2) - Bowling  
Assembly & Leisure (D2) - Casino  
Assembly & Leisure (D2) - Childrens/Youth Centre  
Assembly & Leisure (D2) - Cinema  
Assembly & Leisure (D2) - Concert Hall  
Assembly & Leisure (D2) - Disco & Dance Hall  
Assembly & Leisure (D2) - Family Entertainment Centres  
Assembly & Leisure (D2) - General Leisure  
Assembly & Leisure (D2) - Golf Courses  
Assembly & Leisure (D2) - Gymnasium  
Assembly & Leisure (D2) - Leisure Complexes

Assembly & Leisure (D2) - Marina  
Assembly & Leisure (D2) - Other  
Assembly & Leisure (D2) - Skating Rink  
Assembly & Leisure (D2) - Social Club  
Assembly & Leisure (D2) - Sports & Health Club  
Assembly & Leisure (D2) - Swimming Baths  
Assembly & Leisure (D2) - Virtual Reality & Laser Games  
Business (B1a) - Call Centre  
Business (B1a) - Call Centre - Business Park  
Business (B1a) - Call Centre - Office  
Business (B1a) - Call Centre - Warehouse  
Business (B1a) - Government Office  
Business (B1a) - Office  
Business (B1a) - Office - Business Park  
Business (B1a) - Serviced Office  
Business (B1a) - Training Centre  
Business (B1b) - Business Parks  
Business (B1b) - Office - R&D/High Tech  
Business (B1b) - Research & Development  
Business (B1b) - Science Parks  
Business (B1c) - Car Care Centres  
Business (B1c) - Garage / Workshop  
Business (B1c) - Light Industrial / Business Units  
Business (B1c) - Garage / Workshop  
General - Ancillary Floor  
General - Bar Area  
General - Car Parking  
General - Cycle Stands  
General - General Retail  
General - Hab Rooms per Hectare  
General - Land Area  
General - Plant Area  
General - Reception Area  
General - Site Area  
General - Storage Area  
General - Sui Generis

General - Total Building Size  
General - Total Floor Space  
General - Viewing Gallery  
Hotels (C1) - Apart-Hotel  
Hotels (C1) - Boarding House or Guesthouse  
Hotels (C1) - Hostel/Bed & Breakfast  
Hotels (C1) - Hotel  
Hotels (C1) - Travel Lodge  
Industrial (B1/2) - Heavy Industrial  
Industrial (B1/2) - Mixed Industrial - B1, B2  
Industrial (B1/2/8) - Industrial Park  
Industrial (B1/2/8) - Mixed Industrial - B1, B2, B8  
Industrial (B2) - Factory  
Industrial (B2) - General Industrial  
Industrial (B8) - Distribution Parks  
Industrial (B8) - Storage and Distribution  
Land - Commercial Land  
Land - Land  
Land - Residential Land  
Non-resi Institutional (D1) - Art Gallery  
Non-resi Institutional (D1) - Church/Church Hall  
Non-resi Institutional (D1) - Clinic/Health Centre  
Non-resi Institutional (D1) - Community Uses  
Non-resi Institutional (D1) - Conference Centres  
Non-resi Institutional (D1) - Creche/Day Nursery  
Non-resi Institutional (D1) - Exhibition Hall  
Non-resi Institutional (D1) - General  
Non-resi Institutional (D1) - Library  
Non-resi Institutional (D1) - Museum  
Non-resi Institutional (D1) - Music & Concert Halls  
Non-resi Institutional (D1) - Place of Worship  
Non-resi Institutional (D1) - Professional Medical  
Non-resi Institutional (D1) - Public Hall  
Non-resi Institutional (D1) - Schools & Colleges  
Non-resi Institutional (D1) - Training Centres  
Non-resi Institutional (D1) - University

Other Uses - Advertising Hoarding  
Other Uses - Multi-Storey Car Park  
Residential - Development  
Residential (C3) - Conversion  
Residential (C3) - General  
Residential (C3) - Key-worker Housing  
Residential (C3) - Live-Work  
Residential (C3) - Private  
Residential (C3) - Retirement  
Residential (C3) - Shared-Ownership  
Residential (C3) - Sheltered Housing  
Residential (C3) - Social  
Residential (C3) - Social - Rented  
Residential Institutional (C2) - College/Training Centre with Resi Accom  
Residential Institutional (C2) - Hospital  
Residential Institutional (C2) - Institutional Residential  
Residential Institutional (C2) - Nursing/Care Home  
Residential Institutional (C2) - Residential School  
Residential Institutional (C2) - Student Accommodation  
Retail - Cash & Carry/Wholesale Warehouse/Club  
Retail - Foodstore/Supermarket  
Retail - Professional  
Retail (A1) - Bus Stations/Transport Interchanges etc  
Retail (A1) - Domestic Hire Shops  
Retail (A1) - Dry Cleaners  
Retail (A1) - Factory Outlet Centre  
Retail (A1) - Foodstore/Supermarket  
Retail (A1) - Funeral Directors  
Retail (A1) - Garden Centres  
Retail (A1) - General Retail  
Retail (A1) - Hairdressers  
Retail (A1) - Internet Cafes  
Retail (A1) - Motorway Service Areas  
Retail (A1) - Non Food Retail Warehouse  
Retail (A1) - Post Office  
Retail (A1) - Sandwich Bars (Cold Food)



Retail (A1) - Showrooms - General  
Retail (A1) - Travel/Ticket Agencies  
Retail (A1/2/3) - Department Stores  
Retail (A1/2/3/4/5) - Mixed-use Retail (A1/2/3/4/5, B1 or D1)  
Retail (A1/2/3/4/5) - Retail Park  
Retail (A1/2/3/4/5) - Shopping Centre  
Retail (A1/2/3/4/5/D2) - Mixed-use Retail and Leisure  
Retail (A2) - Financial  
Retail (A2) - Financial & Professional Services  
Retail (A2) - Professional  
Retail (A3) - Restaurants and Cafes (Food & Drink)  
Retail (A4) - Drinking Establishment (Pub/Bar)  
Retail (A5) - Hot Food Take Away (Food & Drink)  
Retail (A5) - Hot Food Take-Away Drive-Thru  
Rural - Bare Agricultural Land  
Rural - Farm  
Rural - Farm - tenanted  
Rural - Farm - vacant possession  
Rural - Farmland  
Rural - Forestry  
Sui Generis - Amusement Arcades  
Sui Generis - Betting Shop  
Sui Generis - Budget Accommodation  
Sui Generis - Car Showrooms  
Sui Generis - Car Wash/Jet Wash  
Sui Generis - Cash & Carry/Wholesale Warehouse/Club  
Sui Generis - Clubs & Nightclub  
Sui Generis - Floating House  
Sui Generis - Launderette  
Sui Generis - Motor Car Showrooms  
Sui Generis - Motor Vehicles Hire/Taxi Business  
Sui Generis - Petrol Stations  
Sui Generis - Private Members Club  
Sui Generis - Roadside Service Areas  
Sui Generis - Scrapyard/Motor Vehicles Breakers Yard  
Sui Generis - Theatre

Telecoms - Telecoms

## **Appendix 1 – Lease Types Equivalents**

FRI  
IRL

## **Appendix 1 – Lease Transaction Types Equivalents**

Lease  
Assignment  
Lease Renewal  
Sub Letting  
Licence

## **Appendix 1 – Categories Amenities Equivalents**

24 Hour Access  
24 Hour Security  
24-Hour Porterage  
4 Pipe Fan Coil Air Conditioning  
Abuts Railway  
Air Conditioning  
Alarm  
ATMs  
Atrium  
Baby Facilities  
Bicycle Facilities  
Bowling alley  
BREEAM excellent  
BREEAM outstanding  
BREEAM very good  
Broadband  
Building Reception  
Bulky Goods Planning Consent  
Car wash

Carpeted Offices  
Cat II Lighting  
Cat V Cabling  
CCTV  
Central Heating  
Chapel  
Cinema  
Comfort Cooling  
Commissionaire  
Concierge  
Creche  
Customer Card  
Customer Services Desk  
Dentist  
Disabled Access  
Disabled Parking  
Disabled Toilets  
Dockside  
Double Glazing  
Electric Heating  
Entry Phone  
Escalator(s)  
Events Programme  
Food Court  
Fully fitted out  
Gated Development  
Goods lift(s)  
Gym  
Heritage Centre  
Ice Rink  
Information point  
Kiosks/barrow Traders  
Kitchenette  
Landscaped Garden(s)  
Leisure/Sports Facilities  
LG3 Lighting

LG7 Lighting  
Library  
Lift/s  
Loading bay(s)  
Marble Ceilings  
Medical centre  
Metal Ceilings  
Mutliplex cinema  
Natural Light  
Nightclub  
Open Planning Consent  
Park 'n Ride Facilities  
Parking Spaces  
Perimeter Trunking  
Petrol Station  
Play centre  
Police station (on-site)  
Public Transport Interchange  
Raised Floors  
Recycling facilities  
River/Canalside  
Roller Shutter Access  
Roof Terrace  
Security  
Separate Entrance  
Separate Kitchen  
Shell/Loft Apartments  
Shopmobility  
Shopper lockers  
Shoppertainment Programme  
Shower/s  
Stairs  
Storage  
Supermarket  
Suspended Ceilings  
Swimming Pool

Taxi rank  
Three-Phase Power  
Toilets  
Tourist Office  
Under Floor Trunking  
VAV Air Conditioning  
Versatemp Air Cooling  
WCs  
WC's on each floor  
WiredScore Gold  
WiredScore Platinum  
WiredScore Silver  
Wooden Floors

## Appendix 1 – Categories EPC Rating Equivalents

A  
B  
C  
D  
E  
F  
G

## Appendix 1 – Categories Grade of Space Equivalents

Design & Build

New - New Build (existing)

New - New Build (pre-construction)

New - New Build (under construction)

New - Refurb (existing)

New - Refurb (pre-construction)

New - Refurb (under construction)

Second-hand Grade A

Second-hand Grade B

Second-hand (Retail)

Second-hand (undisclosed)