

Agency Pilot CRM EGI Radius Guide

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helpdesk@apcrm.co.uk

www.agencypilot.com

6b Churchill Way, Chapeltown, Sheffield, S35 2PY

Overview

This document was put together to guide you through the process of uploading properties and transactions from Agency Pilot CRM to EGI Radius.

Prerequisites

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

A system administrator is required to configure the feed settings. (see EGI-Radius-Setup.pdf guide)

Availability

The sections highlighted below indicate which fields are mandatory/optional when feeding Availabilities to EGI Radius.

- Red** – These fields are mandatory; they **must** be entered in order to feed to EGI Radius.
- Orange** – System Administrators can **choose** to make these mandatory in order to feed to EGI Radius.
- Blue** – System Administrators can choose to make these ‘Publish if specified’; if you populate these fields, they will be included in the feed to EGI Radius.

When making a property available select the **Radius** tick box in the Internet Listing section if you would like to feed it to EGI Radius.

Status *

AVAILABLE

Internet Listing *

Show On Internet

Property Feed

- EG
- Daft
- Rightmove
- Zoopla
- Radius

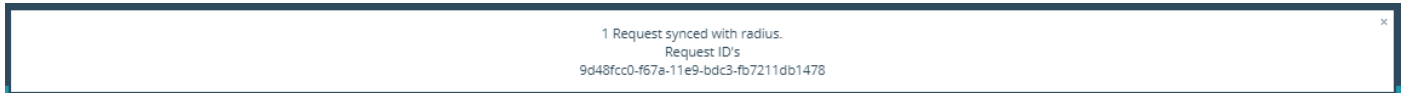
If any of the mandatory fields have not been entered when you click Save you will be alerted to the fields that you need to fill in before the record can be included in the feed to EGI Radius.

Save Cancel Back

Property did not pass validation:

- Property did not pass mandatory fields validation For Radius:
 - Total Space is invalid or missing
 - Measurement Type (GIA/NIA etc) is invalid or missing
 - Floors/Accommodation amount is invalid or missing
 - Landlord Type (company/Individual) is invalid
 - Service Charge Amount is invalid or missing
 - 'Service Charge Measurement' must not be empty.
 - 'Grade Of Space' must not be empty.
 - Grade of space is invalid, no Radius equivalent has been setup
 - 'Amenities' must not be empty.
 - Amenities is invalid, no Radius equivalent has been setup
 - 'Property Website Address' must not be equal to ''.
 - 'Property Website Address' must be between 1 and 200 characters. You entered 0 characters.
 - Property Website Address is invalid or missing (must be https:)
 - Lease Type (FRI/IRL) invalid or missing

If the property has been synced with EGI Radius successfully you will see the following confirmation message.



Status *
AVAILABLE

Internet Listing *
Show On Internet
✓ Zoopla
Realtime feeds up to date

Address *
Postcode *
S35 2PY Look-up

UPRN
1241241 Look-up

Building Name
Sheffield S35a Business Park

Secondary Name
Unit 6B

Street *
Churchill Way

District

Once you have used the Postcode Look-up to populate the address click on the UPRN Look-up and then click Select to choose the relevant UPRN.

UPRN Look-up ✕

UPRN Look Up

Search for the associated UPRN via entering any part of the property's address.

S35 2PY

Showing 1 to 50 of 50 entries

Select	UPRN	Address	Parent UPRN	Building Number	Postcode
Select	10013333848	STREET RECORD, CHURCHILL WAY, SHEFFIELD, S35 2PY	0		S35 2PY
Select	10013161806	UNIT 1, CHURCHILL WAY, SHEFFIELD, S35 2PY	0		S35 2PY
Select	10003574916	SHEFFIELD 35A BUSINESS PARK, CHURCHILL WAY, SHEFFIELD, S35 2PY	0		S35 2PY
Select	10013163386	LAND NORTH OF 18, CHURCHILL WAY, SHEFFIELD, S35 2PY	0		S35 2PY
Select	10003575398	SHEFFIELD 35A BUSINESS PARK, CHURCHILL WAY, SHEFFIELD, S35 2PY	10003574916		S35 2PY
Select	10013298950	UNIT 6B SHEFFIELD 35A BUSINESS PARK, CHURCHILL WAY, SHEFFIELD, S35 2PY	10003574916		S35 2PY
Select	10013161812	UNIT 6A SHEFFIELD 35A BUSINESS PARK, CHURCHILL WAY, SHEFFIELD, S35 2PY	10003574916		S35 2PY
Select	10013161815	UNIT 8 SHEFFIELD 35A BUSINESS PARK, CHURCHILL WAY, SHEFFIELD, S35 2PY	10003574916		S35 2PY
Select	10013161817	UNIT 11 SHEFFIELD 35A BUSINESS PARK, CHURCHILL WAY, SHEFFIELD, S35 2PY	10003574916		S35 2PY
Select	10013161821	UNIT 18 SHEFFIELD 35A BUSINESS PARK, CHURCHILL WAY, SHEFFIELD, S35 2PY	10003574916		S35 2PY
Select	10091834741	FARESCO LTD SHEFFIELD 35A BUSINESS PARK, CHURCHILL WAY, SHEFFIELD, S35 2PY	10003574916		S35 2PY

Property Type *

Commercial

Size

Min Size	Max Size	Total Size	Dimension *	Measurement Type
2500	5000	7500	SqFt	NIA

Car Parking

Not Known No Car Park Car Park

Eaves Height **Eaves Dimension**

0 -- No Selection --

Description

Two storey office building located in the heart of Sheffield



Tenure Comments

A new FRI lease for a term by arrangement subject to 3 yearly reviews.

Agent(s) *

Alcium Property LLP - James Helpdesk (0113 253 7372)

The Agent Forename, Surname, Phone Number and Email are mandatory when feeding a property to EGI Radius.

Price/Rent/Service Charge		
Currency		
£		
Rent From	Rent To	Rental Term
2500	2500	per annum
Sale From	Sale To	Sale Term
0	0	-- No Selection --
Leasehold Purchase Price		
0		
Lease Type		
Full Repairing and Insuring		
Service Charge	Service Charge Term	
45543	per annum	
Marketing Budget		
0		
Owner(s)  		
ARUNDEL MOUNT PLEASANT LAND LTD - John Alcium (2323)		
Solicitor(s)		
Not Selected		

In such instances where a field is populated with a Contact the feed to EGI Radius will only include the Company name.

Categories ^

Search Check/Uncheck All

EGI Radius Feed

- EPC: A
- EPC: B
- EPC: C
- EPC: D
- EPC: E
- EPC: F
- EPC: G

Grade of space: Design & Build

Grade of space: New - New Build (Existing)

Grade of space: New - New Build (Pre-Construction)

Grade of space: New - New Build (Under Construction)

Grade of space: New - Refurb (existing)

Grade of space: New - Refurb (Pre-Construction)

Amenities: 24 Hour Access

Amenities: 24 Hour Security

Amenities: 24-Hour Portage

Amenities: 4 Pipe Fan Coil Air Conditioning

Amenities: Abuts Railway

Amenities: Air Conditioning

Amenities: Alarm

Amenities: ATMs

Amenities: Atrium

Amenities: Baby Facilities

Amenities: Bicycle Facilities

Amenities: Bowling Alley

Amenities: BREEAM Excellent

Amenities: BREEAM Outstanding


EPC Rating

-- No Selection --

Council Tax Band

-- No Selection --

Website

 <https://www.royalsproperty.com>

Virtual Tour v

Year ▲	Std Multiplier	SB Multiplier	Full Rates*	Discount*	Rates Payable*
2010 - 2011	41.4	40.7			0
2011 - 2012	43.3	42.6			0
2012 - 2013	45.8	45			0
2013 - 2014	47.1	46.2			0
2014 - 2015	48.2	47.1			0
2015 - 2016	49.3	48			0
2016 - 2017	49.7	48.4			0
2017 - 2018	47.9	46.6			0
2018 - 2019	48.4	49.7			0
2019 - 2020	48.4	49.7	£12,425.00	£0	12425

Letting

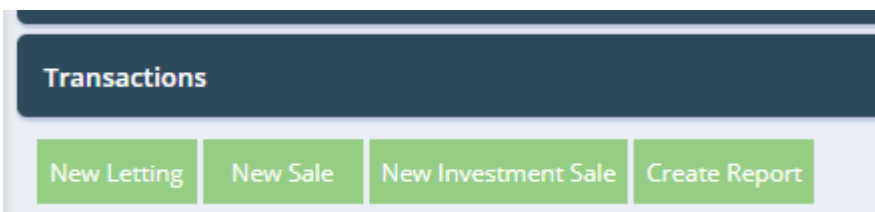
The sections highlighted below indicate which fields are mandatory/optional when feeding Lettings to EGI Radius.

Red – These fields are mandatory; they **must** be entered in order to feed to EGI Radius.

Orange – System Administrators can **choose** to make these mandatory in order to feed to EGI Radius.

Blue – System Administrators can choose to make these ‘Publish if specified’; if you populate these fields, they will be included in the feed to EGI Radius.

Navigate to the relevant property and open the Transactions tab. Select the ‘New Letting’ button.



Switch on the ‘Feed Transaction to Radius’ toggle.

Radius

Feed Transaction to Radius



Switching on the Radius Private toggle will still include that field in the feed so that it can be used to generate statistics within Radius but users of Radius will not be able to see this information.

General *			
Transaction Type *			
Open Market Letting			
Details			
Start Date	Radius Private	Effective Date	
1-Oct-2019	<input type="checkbox"/>	1-Oct-2019	
Years	Months	Days	Radius Private
10	0	0	<input type="checkbox"/>
Expiry Date	Radius Private		
30-Sep-2029	<input type="checkbox"/>		
Agreed Rent	Terms	Radius Private	
18900	per annum	<input type="checkbox"/>	
Rent free months			
0			
Outside Act	Sublet	Agreed	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Rent Deposit	Service Charge Cap		
<input type="checkbox"/>	<input type="checkbox"/>		
Comments			

In such instances where a field is populated with a Contact the feed to EGI Radius will only include the Company name.

Parties

Tenant

Search Contacts (Company, Name, Email, Telephone, Mobile)

Tenant Agent

Maximum number of selections reached (1)

Search Contacts (Company, Name, Email, Telephone, Mobile)

Tenant Solicitor
 Search Contacts (Company, Name, Email, Telephone, Mobile)

Landlord

Search Contacts (Company, Name, Email, Telephone, Mobile)

Landlord Agent
 Search Contacts (Company, Name, Email, Telephone, Mobile)

Landlord Solicitor
 Search Contacts (Company, Name, Email, Telephone, Mobile)

The following property fields are also mandatory/optional mandatories when including a Letting in the feed to EGI Radius.

Address *

Postcode *

UPRN

Building Name

Secondary Name

Floor Space Occupied *

Add Row Add 5 Rows Discard changes

Showing 1 to 1 of 1 entries

Name	Description	Dimension	Max Size	Rent (F ² /M ²)	Rent	UPRN
Ground Floor		SqFt	2,100.00	9.00	£18,900.00	10013333848
			2,100.00		£18,900.00	

Showing 1 to 1 of 1 entries

Total Space Occupied *	Calculated Rent	End Adjustment %
2100	18900	0

Lease Types

Check/Uncheck All

- Assignment
- Sub Lease
- Direct Lease
- Premium Lease
- Full Repairing and Insuring
- Internal Repairing and Insuring
- Nil increase
- Full Repairing Lease

Categories

Search Check/Uncheck All

- EGI Radius Feed
 - EPC: A
 - EPC: B
 - EPC: C
 - EPC: D
 - EPC: E
 - EPC: F
 - EPC: G
- Grade of space: Design & Build
- Grade of space: New - New Build (Existing)
- Grade of space: New - New Build (Pre-Construction)
- Grade of space: New - New Build (Under Construction)
- Grade of space: New - Refurb (existing)
- Grade of space: New - Refurb (Pre-Construction)

- Amenities: 24 Hour Access
- Amenities: 24 Hour Security
- Amenities: 24-Hour Portorage
- Amenities: 4 Pipe Fan Coil Air Conditioning
- Amenities: Abuts Railway
- Amenities: Air Conditioning
- Amenities: Alarm
- Amenities: ATMs
- Amenities: Atrium
- Amenities: Baby Facilities
- Amenities: Bicycle Facilities
- Amenities: Bowling Alley
- Amenities: BREEAM Excellent
- Amenities: BREEAM Outstanding

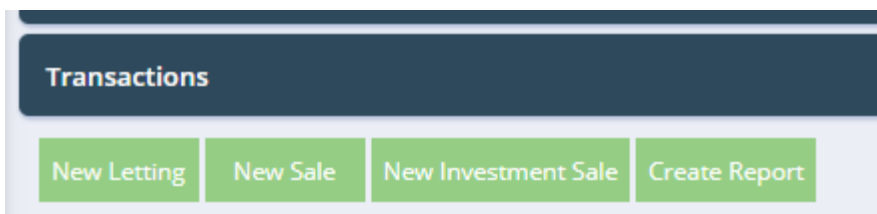
Rateable Values		Rates Comments			
Previous Rateable Value	Current Rateable Value				
0	25000				
Location					
Country London <input checked="" type="checkbox"/> <input checked="" type="radio"/> England <input type="radio"/> Scotland <input type="radio"/> Wales <input type="radio"/> Northern Ireland <input type="radio"/> Republic of Ireland					
<input type="button" value="Calculate"/>					
Year ▲	Std Multiplier	SB Multiplier	Full Rates*	Discount*	Rates Payable*
2010 - 2011	41.4	40.7			0
2011 - 2012	43.3	42.6			0
2012 - 2013	45.8	45			0
2013 - 2014	47.1	46.2			0
2014 - 2015	48.2	47.1			0
2015 - 2016	49.3	48			0
2016 - 2017	49.7	48.4			0
2017 - 2018	47.9	46.6			0
2018 - 2019	48.4	49.7			0
2019 - 2020	48.4	49.7	£12,425.00	£0	12425

Occupational Sales

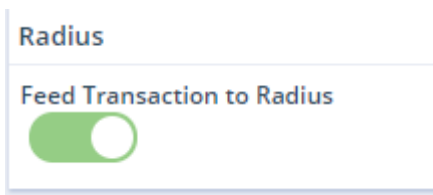
The sections highlighted below indicate which fields are mandatory/optional when feeding Occupational Sales to EGI Radius.

- Red** – These fields are mandatory; they **must** be entered in order to feed to EGI Radius.
- Orange** – System Administrators can **choose** to make these mandatory in order to feed to EGI Radius.
- Blue** – System Administrators can choose to make these ‘Publish if specified’; if you populate these fields, they will be included in the feed to EGI Radius.

Navigate to the relevant property and open the Transactions tab. Select the ‘New Sale’ button.



Switch on the ‘Feed Transaction to Radius’ toggle.



Switching on the Radius Private toggle will still include that field in the feed so that it can be used to generate statistics within Radius but users of Radius will not be able to see this information.

New Sale - Sheffield S35a Business Park, Unit 6B, Churchill Way, Sheffield, South Yorkshire

Radius

Feed Transaction to Radius



General *

Transaction Type *

Occupation Sale

Details

Sale Date

1-Oct-2019



Sale Price

25000

Radius Private



Floor Space

Add Row

Add 5 Rows

Discard changes

Showing 0 to 0 of 0 entries

Name

Description

Dimension

Showing 0 to 0 of 0 entries

Total Space Occupied

7500

End Adjustment

0

Parties

Purchaser

Search Contacts (Company, Name, Email, Telephone, Mobile)

Purchaser Agent

Maximum number of selections reached (1)

Search Contacts (Company, Name, Email, Telephone, Mobile)

Purchaser Solicitor

Search Contacts (Company, Name, Email, Telephone, Mobile)

Vendor

Search Contacts (Company, Name, Email, Telephone, Mobile)

Vendor Agent

Maximum number of selections reached (1)

Search Contacts (Company, Name, Email, Telephone, Mobile)

Vendor Solicitor

Search Contacts (Company, Name, Email, Telephone, Mobile)

In such instances where a field is populated with a Contact the feed to EGI Radius will only include the Company name.

Property Type *

Search

- Industrial
- Office (comm)
- Retail - A1
- Hotels/Guest Houses
- Garden Centre
- Investment - Industrial
- Investment - Office
- Investment - Retail
- Land - Commercial
- Land - Residential
- Pub/Club
- Railway House
- Restaurant
- Retail - A2
- Retail - A3

Size

Min Size	Max Size	Total Size	Dimension *	Measurement Type
2500	5000	7500	SqFt	NIA

Car Parking

The following property fields are also mandatory/optional mandatory when including an Occupational Sale in the feed to EGI Radius.

Address *

Postcode *

S35 2PY Look-up

UPRN

1241241 Look-up

Building Name

Sheffield S35a Business Park

Standard Name

Floor Space Occupied *

Add Row Add 5 Rows Discard changes

Showing 1 to 1 of 1 entries

Name	Description	Dimension	Max Size	Rent (F ² /M ²)	Rent	UPRN
Ground Floor		SqFt	2,100.00	9.00	£18,900.00	10013333848
			2,100.00		£18,900.00	

Showing 1 to 1 of 1 entries

Total Space Occupied *	Calculated Rent	End Adjustment %
2100	18900	0

Lease Types

Check/Uncheck All

- Assignment
- Sub Lease
- Direct Lease
- Premium Lease
- Full Repairing and Insuring
- Internal Repairing and Insuring
- Nil increase
- Full Repairing Lease

Categories

Search Check/Uncheck All

- EGI Radius Feed
 - EPC: A
 - EPC: B
 - EPC: C
 - EPC: D
 - EPC: E
 - EPC: F
 - EPC: G
- Grade of space: Design & Build
- Grade of space: New - New Build (Existing)
- Grade of space: New - New Build (Pre-Construction)
- Grade of space: New - New Build (Under Construction)
- Grade of space: New - Refurb (existing)
- Grade of space: New - Refurb (Pre-Construction)
- Amenities: 24 Hour Access
- Amenities: 24 Hour Security
- Amenities: 24-Hour Portorage
- Amenities: 4 Pipe Fan Coil Air Conditioning
- Amenities: Abuts Railway
- Amenities: Air Conditioning
- Amenities: Alarm
- Amenities: ATMs
- Amenities: Atrium
- Amenities: Baby Facilities
- Amenities: Bicycle Facilities
- Amenities: Bowling Alley
- Amenities: BREEAM Excellent
- Amenities: BREEAM Outstanding

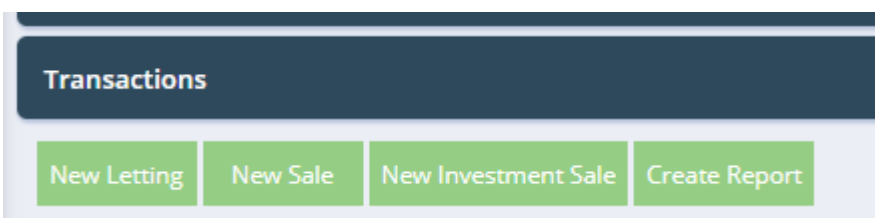
Rateable Values		Rates Comments			
Previous Rateable Value	Current Rateable Value				
0	25000				
Location					
Country		London			
<input checked="" type="radio"/> England <input type="radio"/> Scotland <input type="radio"/> Wales <input type="radio"/> Northern Ireland <input type="radio"/> Republic of Ireland		<input checked="" type="checkbox"/>			
<input type="button" value="Calculate"/>					
Year ▲	Std Multiplier	SB Multiplier	Full Rates*	Discount*	Rates Payable*
2010 - 2011	41.4	40.7			0
2011 - 2012	43.3	42.6			0
2012 - 2013	45.8	45			0
2013 - 2014	47.1	46.2			0
2014 - 2015	48.2	47.1			0
2015 - 2016	49.3	48			0
2016 - 2017	49.7	48.4			0
2017 - 2018	47.9	46.6			0
2018 - 2019	48.4	49.7			0
2019 - 2020	48.4	49.7	£12,425.00	£0	12425

Investment Sale

The sections highlighted below indicate which fields are mandatory/optional when feeding Investment Sale to EGI Radius.

- Red** – These fields are mandatory; they **must** be entered in order to feed to EGI Radius.
- Orange** – System Administrators can **choose** to make these mandatory in order to feed to EGI Radius.
- Blue** – System Administrators can choose to make these ‘Publish if specified’; if you populate these fields, they will be included in the feed to EGI Radius.

Navigate to the relevant property and open the Transactions tab. Select the ‘New Investment Sale’ button.



Switch on the ‘Feed Transaction to Radius’ toggle.

Radius

Feed Transaction to Radius



Switching on the Radius Private toggle will still include that field in the feed so that it can be used to generate statistics within Radius but users of Radius will not be able to see this information.

New Sale - Sheffield S35a Business Park, Unit 6B, Churchill Way, Sheffield, South Yorkshire

Radius

Feed Transaction to Radius

General *

Transaction Type *
Occupation Sale

Details

Sale Date 1-Oct-2019 	Sale Price 25000	Radius Private <input type="checkbox"/>
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Floor Space

Showing 0 to 0 of 0 entries

Name	Description	Dimension
------	-------------	-----------

Showing 0 to 0 of 0 entries

Total Space Occupied
7500

End Adjustment
0

In such instances where a field is populated with a Contact the feed to EGI Radius will only include the Company name.

Parties

Purchaser

✗ Joy Mining Machinery Ltd - John - Joy (0192929)

Search Contacts (Company, Name, Email, Telephone, Mobile)

Purchaser Agent

✗ Commercial Agent - Jim - Smith - helpdesk@a...

Maximum number of selections reached (1)

Search Contacts (Company, Name, Email, Telephone, Mobile)

Purchaser Solicitor

Search Contacts (Company, Name, Email, Telephone, Mobile)

Vendor

✗ ARUNDEL MOUNT PLEASANT LAND LTD - Joh...

Search Contacts (Company, Name, Email, Telephone, Mobile)

Vendor Agent

✗ Alcium Property LLP - Jonathan - Wilkins - hel...

Maximum number of selections reached (1)

Search Contacts (Company, Name, Email, Telephone, Mobile)

Vendor Solicitor

Search Contacts (Company, Name, Email, Telephone, Mobile)

Floor Space Occupied *

Add Row Add 5 Rows Discard changes

Showing 1 to 1 of 1 entries

Name	Description	Dimension	Max Size	Rent (Ft ² /MP)	Rent	UPRN
Ground Floor		SqFt	2,100.00	9.00	£18,900.00	10013333848
			2,100.00		£18,900.00	

Showing 1 to 1 of 1 entries

Total Space Occupied *	Calculated Rent	End Adjustment %
2100	18900	0

Lease Types

Check/Uncheck All

- Assignment
- Sub Lease
- Direct Lease
- Premium Lease
- Full Repairing and Insuring
- Internal Repairing and Insuring
- Nil increase
- Full Repairing Lease

The following property fields are also mandatory/optional mandatories when including an Investment Sale in the feed to EGI Radius.

Address *

Postcode *

S35 2PY

UPRN

1241241

Building Name

Sheffield S35a Business Park

Country Name

Property Type *

Search

- Industrial
- Office (comm)
- Retail - A1
- Hotels/Guest Houses
- Garden Centre
- Investment - Industrial
- Investment - Office
- Investment - Retail
- Land - Commercial
- Land - Residential
- Pub/Club
- Railway House
- Restaurant
- Retail - A2
- Retail - A3

Size

Min Size	Max Size	Total Size	Dimension *	Measurement Type
2500	5000	7500	SqFt	NIA

Car Parking

Categories

Search Check/Uncheck All

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- Amenities: BREEAM Outstanding

Rateable Values			Rates Comments		
Previous Rateable Value	Current Rateable Value				
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Location					
Country		London			
<input checked="" type="radio"/> England <input type="radio"/> Scotland <input type="radio"/> Wales <input type="radio"/> Northern Ireland <input type="radio"/> Republic of Ireland		<input checked="" type="checkbox"/>			
Calculate					
Year ▲	Std Multiplier	SB Multiplier	Full Rates*	Discount*	Rates Payable*
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2013 - 2014	47.1	46.2			0
2014 - 2015	48.2	47.1			0
2015 - 2016	49.3	48			0
2016 - 2017	49.7	48.4			0
2017 - 2018	47.9	46.6			0
2018 - 2019	48.4	49.7			0
2019 - 2020	48.4	49.7	£12,425.00	£0	12425