



# How to Create Your Watsons Account

A **Step-by-Step** Guide in Setting up your Watsons Account



# 1. Create an Account

If you have signed up to be one of our Agent Referrers, our Key Accounts Team will set-up your **new account** on your behalf in the booking system.

By this stage, you will have already confirmed the following:

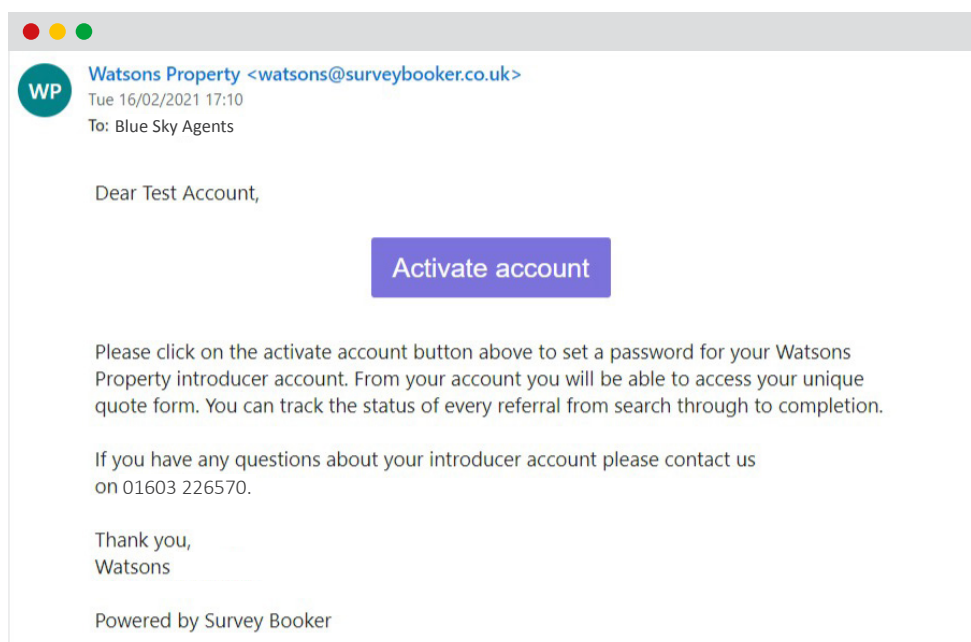
- You will operate a % of net fee
- You would prefer this value in vouchers

This information is required upon set up to ensure that any referrals going through Survey Booker calculate the correct fee.

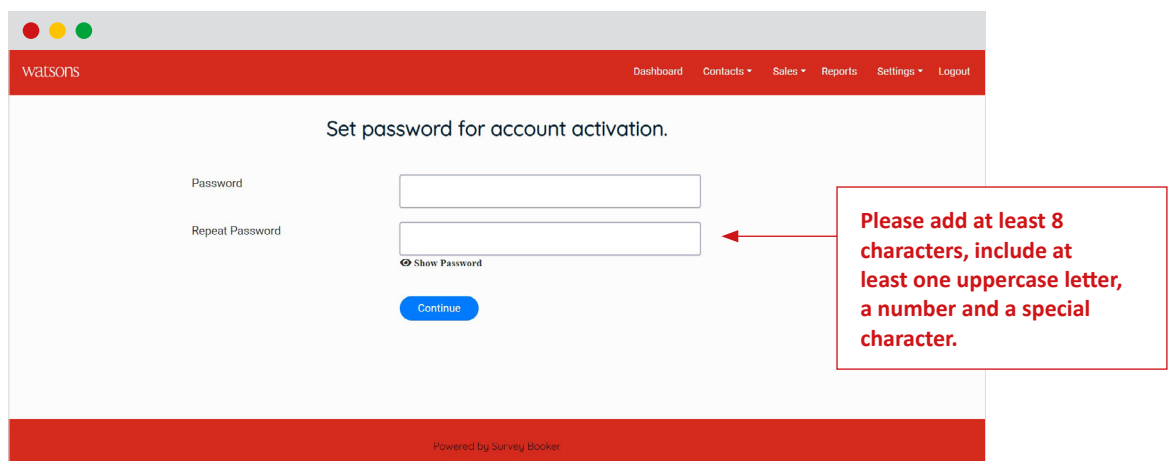


## 2. Activating Your Account

Once your account has been created, you will receive an **Activation Email**. This email requests that upon Activation you set up a **password** for the account.



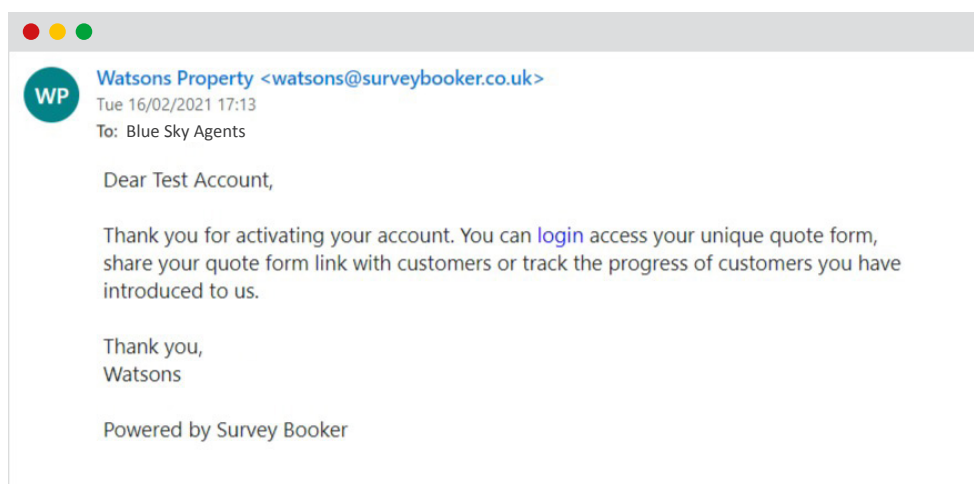
Follow the Password Rules to ensure your account is secure. Once you have done this, click on the **Continue** button.



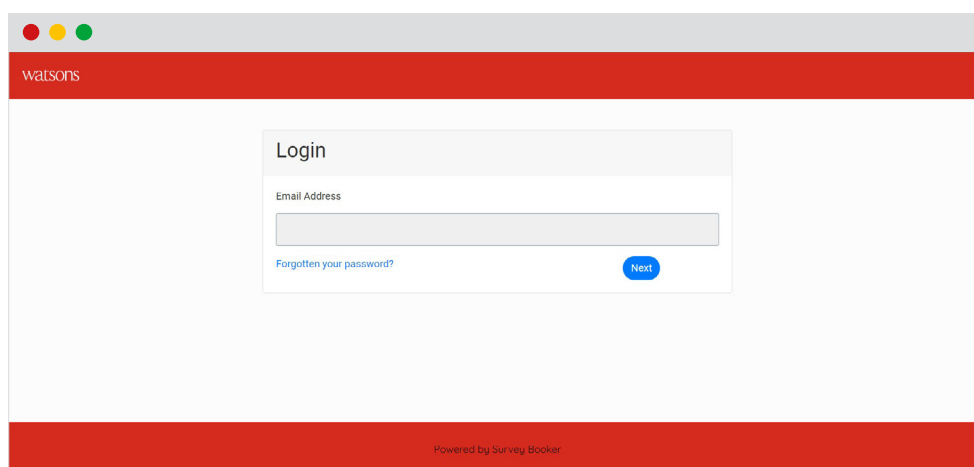
The image shows a screenshot of a web interface for setting a password. The header includes the 'watsons' logo and navigation links for 'Dashboard', 'Contacts', 'Sales', 'Reports', 'Settings', and 'Logout'. The main heading is 'Set password for account activation.' Below this, there are two input fields: 'Password' and 'Repeat Password'. A 'Show Password' toggle is located between the two fields. A blue 'Continue' button is positioned below the 'Repeat Password' field. A red callout box with an arrow pointing to the password field contains the text: 'Please add at least 8 characters, include at least one uppercase letter, a number and a special character.' The footer of the page reads 'Powered by Survey Booker'.

# 3. Activation Confirmation

Now that your password has been set-up and associated with your email address, watch out for your **Activation Confirmation Email**. This email provides you with a link to log-in to your new **Agent Referrer Account**.

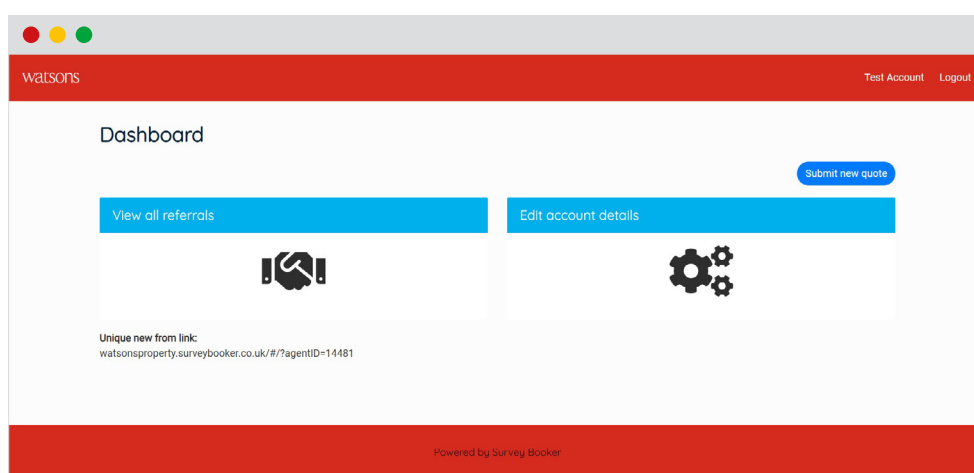


**Log-in** to your account, using the same email / password.



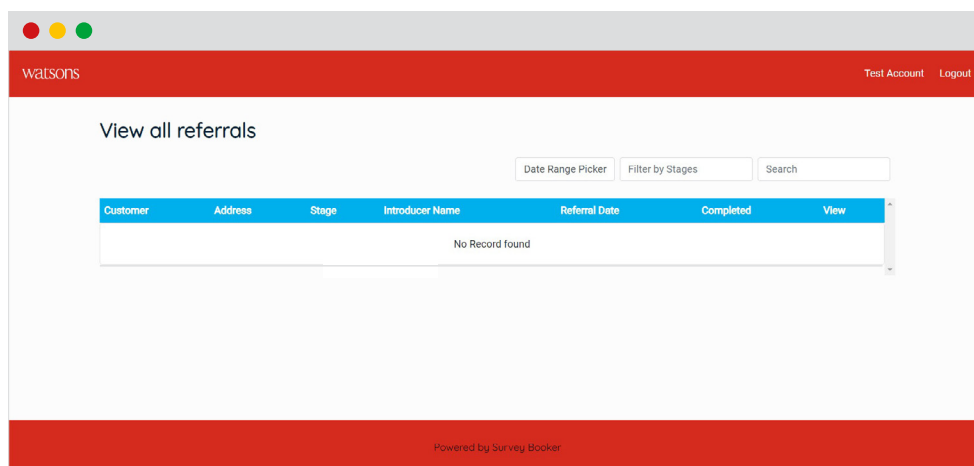
# Your Dashboard

Once you **log-in** to your account for the first time, you will be presented with your **dashboard**.



**Your dashboard has two main functions:**

- To allow you to view all of your bookings via your account.
- Edit your account details



# Your Dashboard

On your **dashboard**, you will also see that you have been presented with a unique link to an online form attached to your **Agent Referrer Account**.

**Example:** [watsonsproperty.surveybooker.co.uk/#/?agentID?=14481](https://watsonsproperty.surveybooker.co.uk/#/?agentID?=14481)

You have two choices here:

1

You can request quotes or finalise bookings **on behalf** of your customers. To ensure the customer receives their quote directly, you will add the customer's name / email address. You can do this by clicking on the **Submit New Quote** button, which takes you directly to your unique online form. If choosing this method, it would help to **bookmark** the URL on your device.

The screenshot shows the Watsons Survey Booker dashboard. At the top, there's a red header with the 'watsons' logo on the left and 'Test Account Logout' on the right. Below the header, a progress bar indicates three steps: '1 Your Survey', '2 Your Details', and '3 Your Quote'. The main content area is titled 'Survey Details' and contains a dropdown menu for 'Which survey do you need?' with the text 'Select Survey Type'. Below this are eight blue buttons with house icons and text labels: 'Help to Buy Valuation', 'RICS Homebuyer Report - Survey', 'RICS Homebuyer Report - Survey and Valuation', 'RICS Building Survey', 'RICS Building Survey and Valuation', 'Bespoke Building Survey', 'Bespoke Building Survey and Valuation', and 'Lease Extension'. There are three input fields: 'Enter the address' with a 'Need help?' link, 'Enter the postcode & press find' with a 'Find' button and an 'Enter address manually' link, and 'Is it a listed building?' with radio buttons for 'No' and 'Yes' and a 'Need help?' link. A text area for 'Any additional information?' with a 'Need help?' link is also present. At the bottom, there's a blue button labeled 'Continue to next page...'. The footer of the dashboard says 'Powered by Survey Booker'.

# Your Dashboard

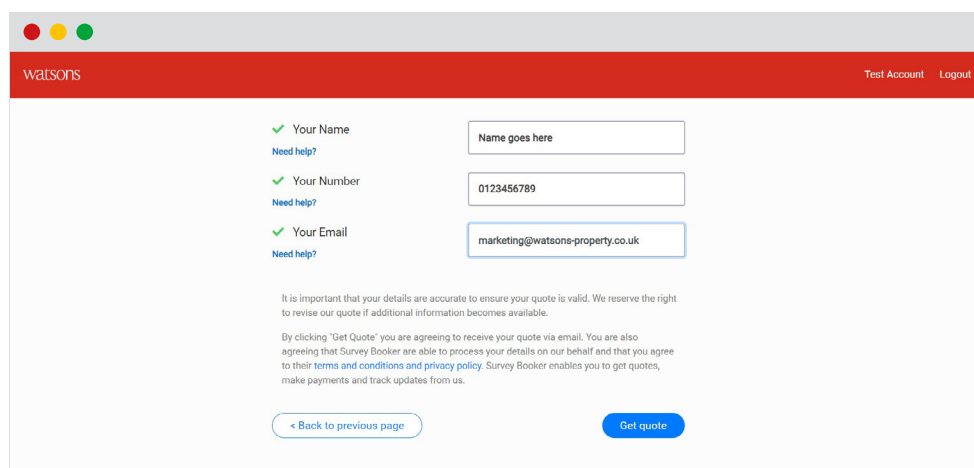
2

Alternatively, you can add the form to your own website, and embed the form on to a web page.

The form will appear exactly the same as your **unique ID link**. You can then guide customers to this page on your website to complete the form themselves.

## Example of iframe code:

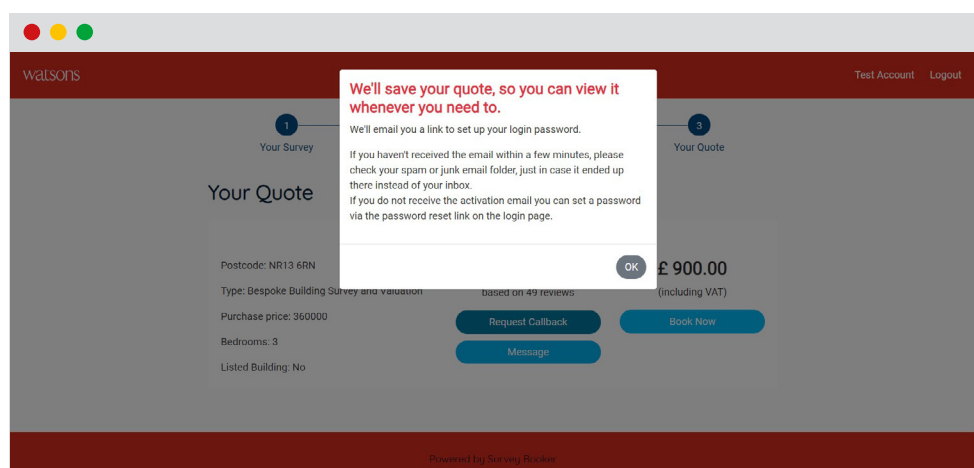
```
<iframe width="100%" height="1500px" style="width: 100%; height: 1500px; border: none; max-width: 100%;" frameborder="0" src="https://agentID.watsonsproperty.surveybooker.co.uk/#/"></iframe>
```



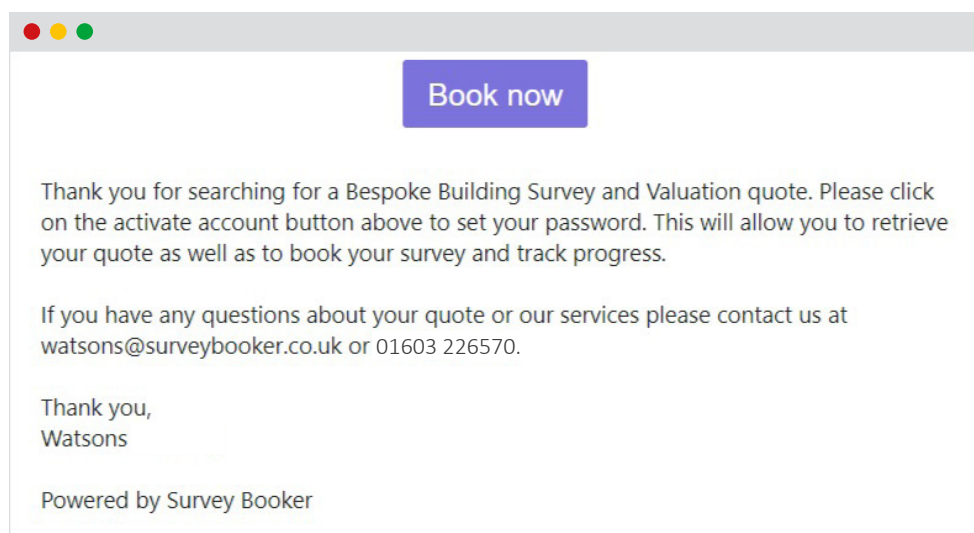
The screenshot shows a web browser window displaying the Watsons quote form. The browser's address bar shows the URL: https://agentID.watsonsproperty.surveybooker.co.uk/#/. The page has a red header with the Watsons logo on the left and 'Test Account Logout' on the right. The main content area contains three input fields, each with a green checkmark and a 'Need help?' link to its left. The first field is labeled 'Your Name' and contains the text 'Name goes here'. The second field is labeled 'Your Number' and contains '0123456789'. The third field is labeled 'Your Email' and contains 'marketing@watsons-property.co.uk'. Below the input fields, there is a paragraph of text: 'It is important that your details are accurate to ensure your quote is valid. We reserve the right to revise our quote if additional information becomes available.' This is followed by another paragraph: 'By clicking "Get Quote" you are agreeing to receive your quote via email. You are also agreeing that Survey Booker are able to process your details on our behalf and that you agree to their terms and conditions and privacy policy. Survey Booker enables you to get quotes, make payments and track updates from us.' At the bottom of the form, there are two buttons: a blue button labeled '< Back to previous page' and a blue button labeled 'Get quote'.

# Customer Quote / Booking

Once the quote is requested, customers will see the following screen:



This informs customers that they have been sent an **Activation Email**, in order to create their own password. This allows them to access any quotes they have requested, plus any previous bookings.



The account will be updated to include final reports and documentation, depending on the service you requested.



Regulated by RICS



0333 220 1234

[www.watsons-property.co.uk](http://www.watsons-property.co.uk)