How to Create Your Watsons Account

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

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watsons

Passionate about property since 1890

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.

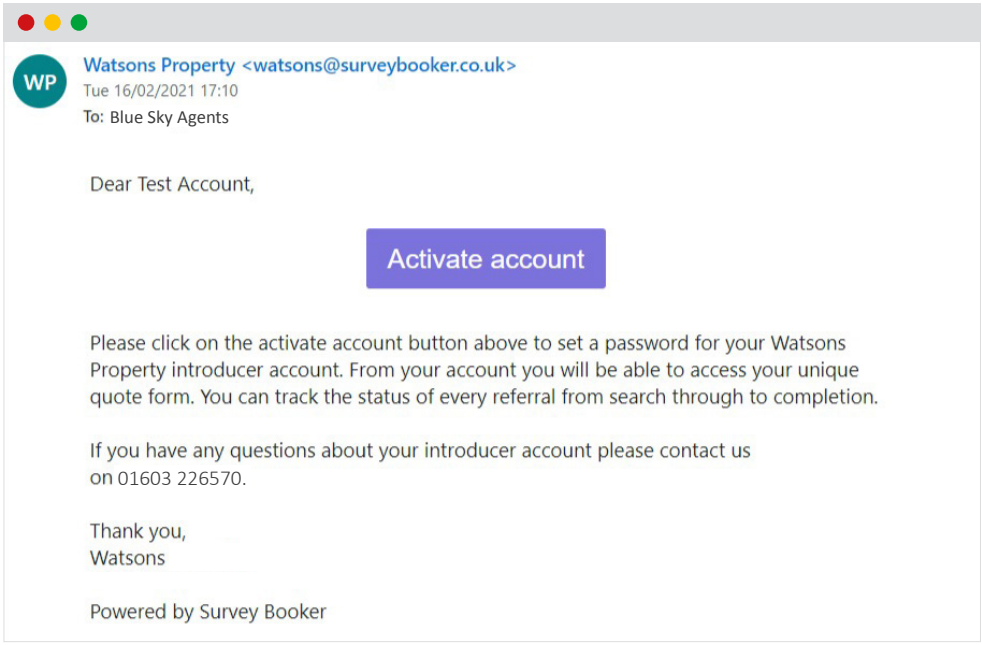
By this stage, you will have already confirmed the following:

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

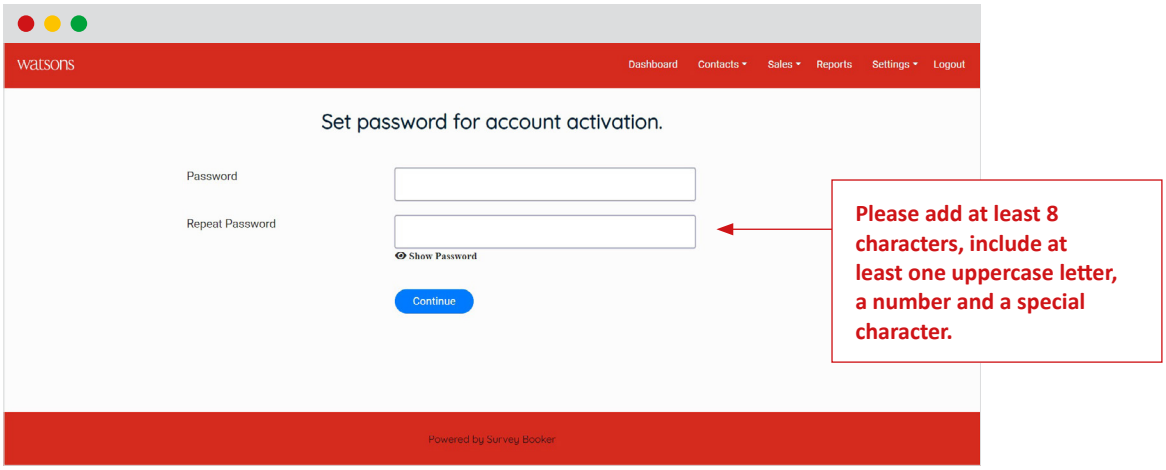
This information is required upon set up to ensure that any referrals going through Survey Booker calculate the correct fee.

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.

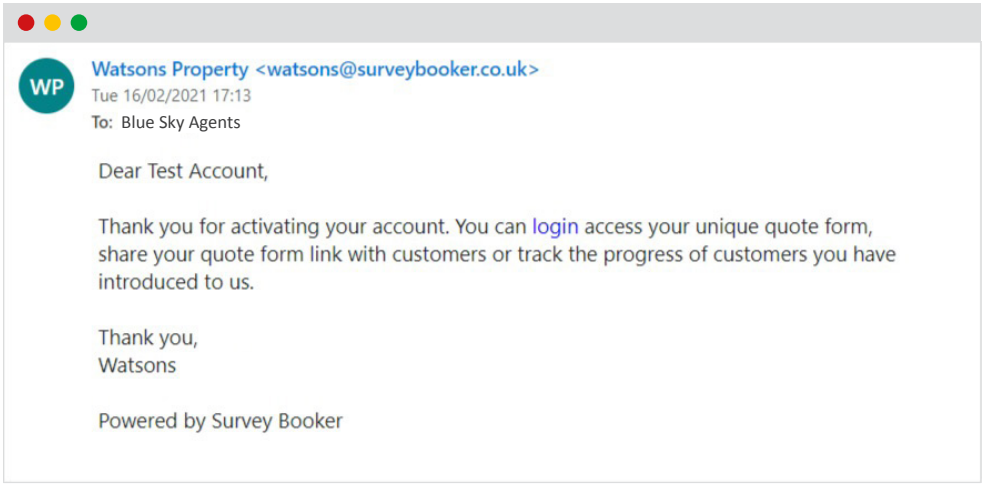


Follow the Password Rules to ensure your account is secure. Once you have done this, click on the **Continue** button.

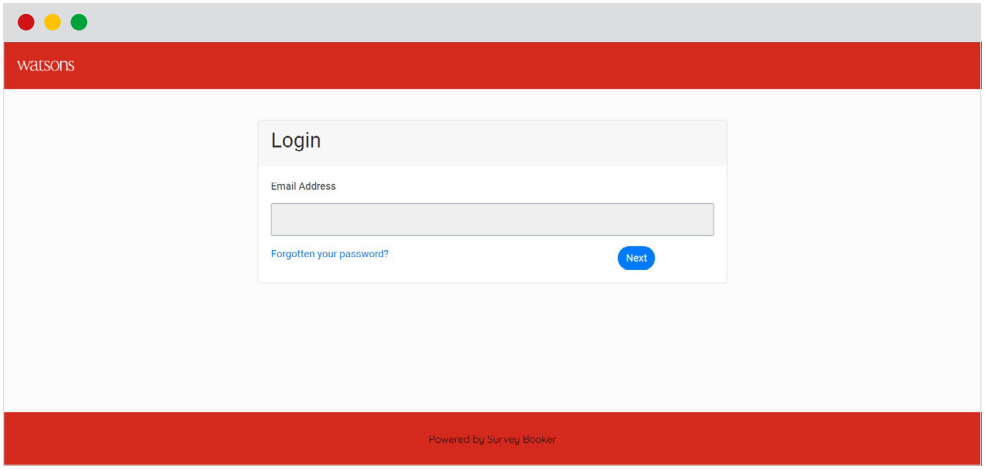


3. Activation Confirmation

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.**

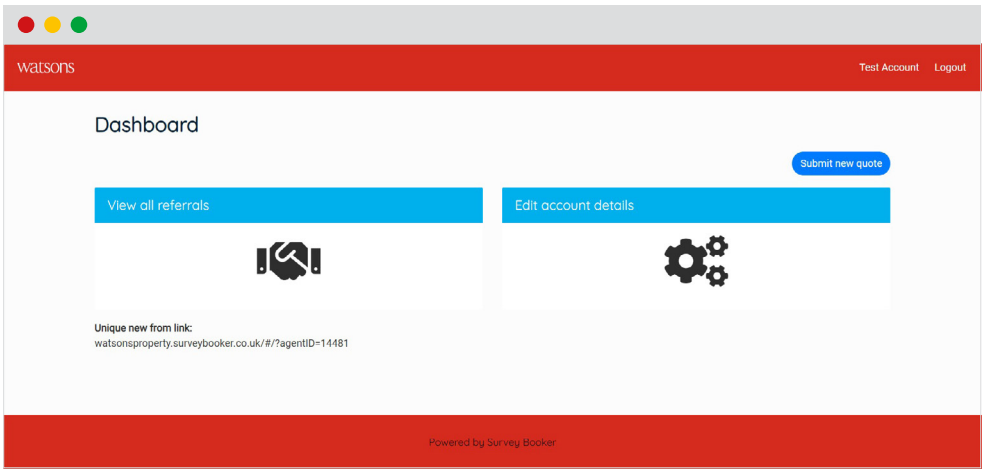


Log-in to your account, using the same email / password.



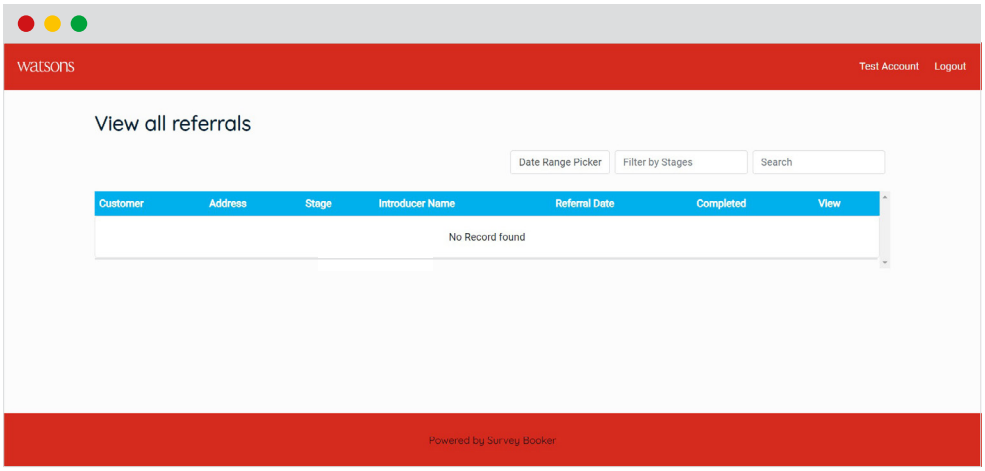
Your Dashboard

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

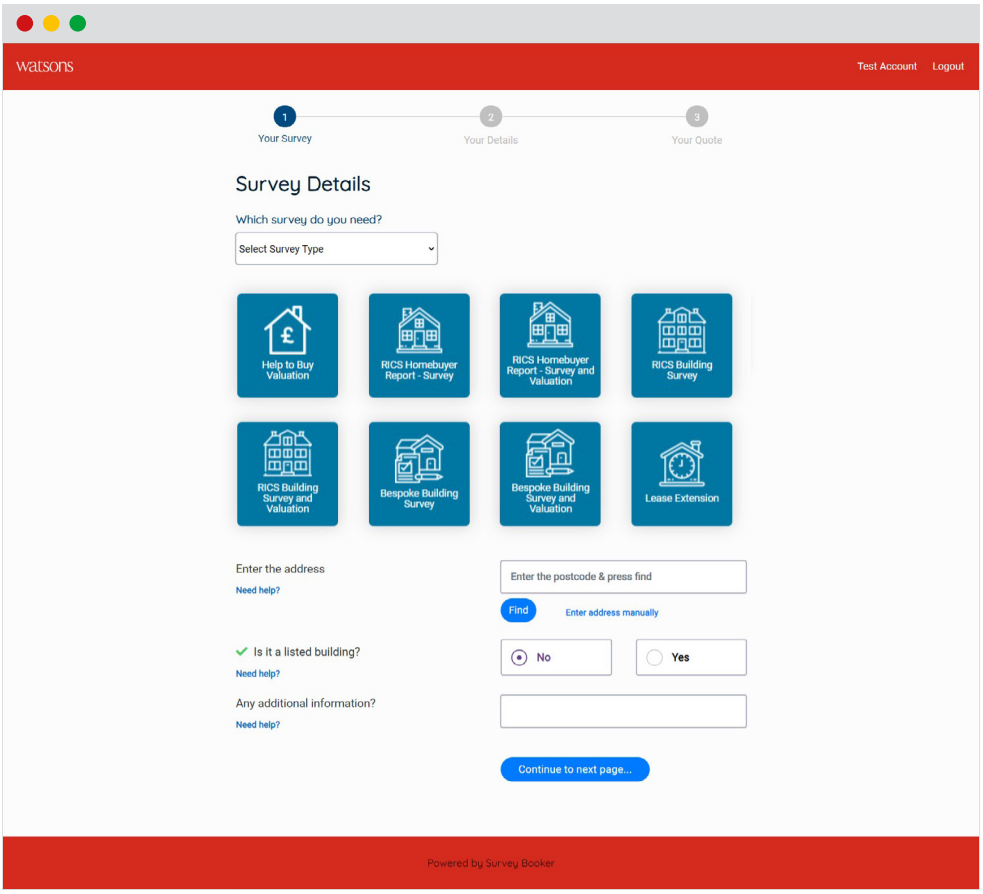
On your **dashboard**, you will also see that you have been presented with a unique link to an online form attached to your **Agent Referrer Account**.

Example: watsonsproperty.surveybooker.co.uk/#/?agentID?=14481

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.



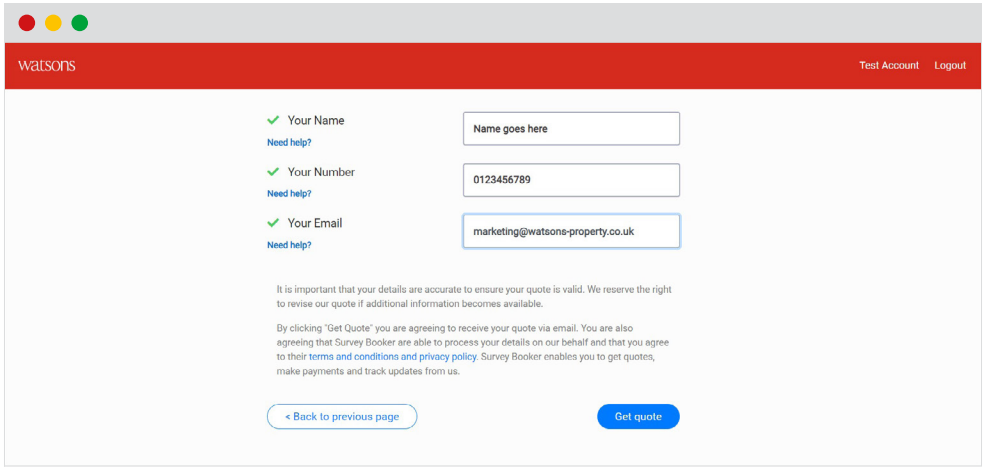
Your Dashboard

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.

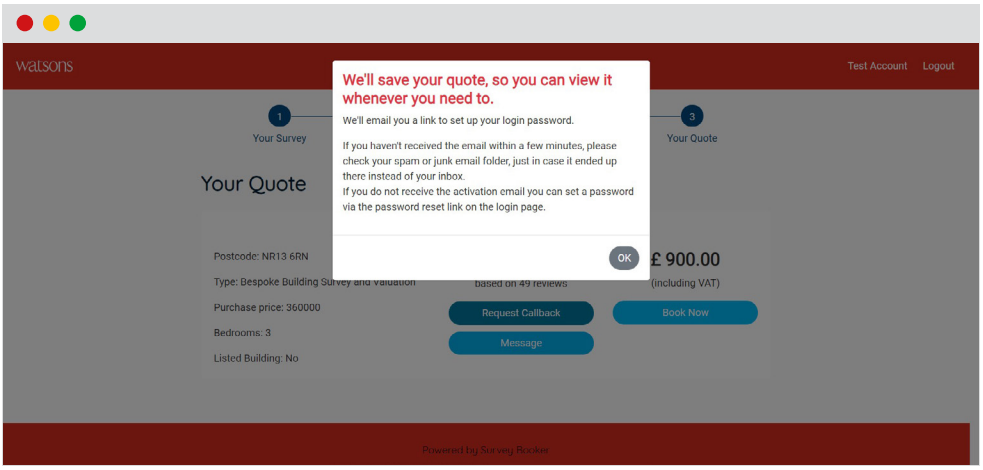
Example of iframe code:

<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>

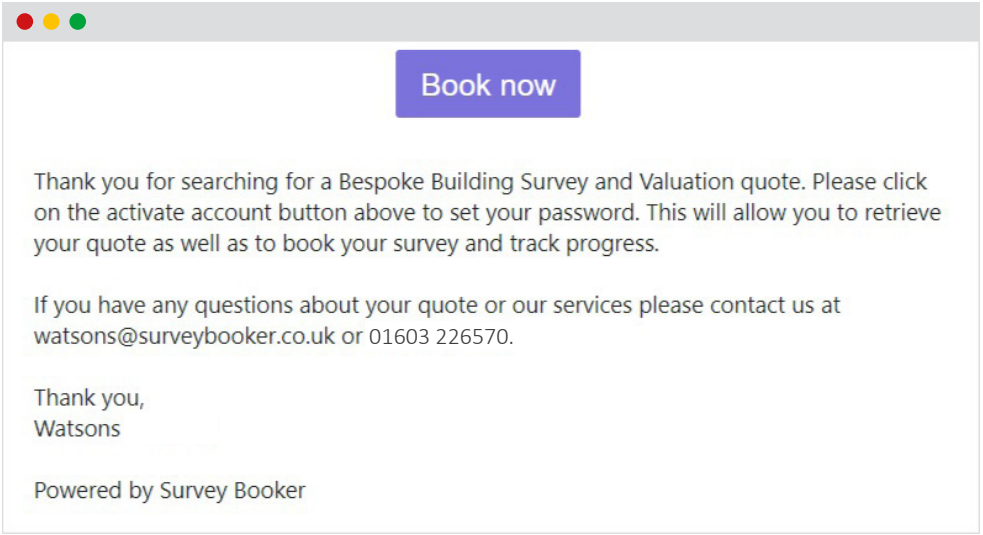


Customer Quote / Booking

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.

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0333 220 1234
www.watsons-property.co.uk