OnTheMarket

OnTheMarket Expert
Dashboard, Market Intel and Sales Monitor

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Dashboard

OnTheMarket Expert now features a newly enhanced dashboard when logging on, which gives a summary of your branch's current performance, as well as that of the local market. This guide gives an overview of the new features and how to get the most out of them.

The dashboard is divided into three sections:

- Your properties
- Your recent performance
- Your patches
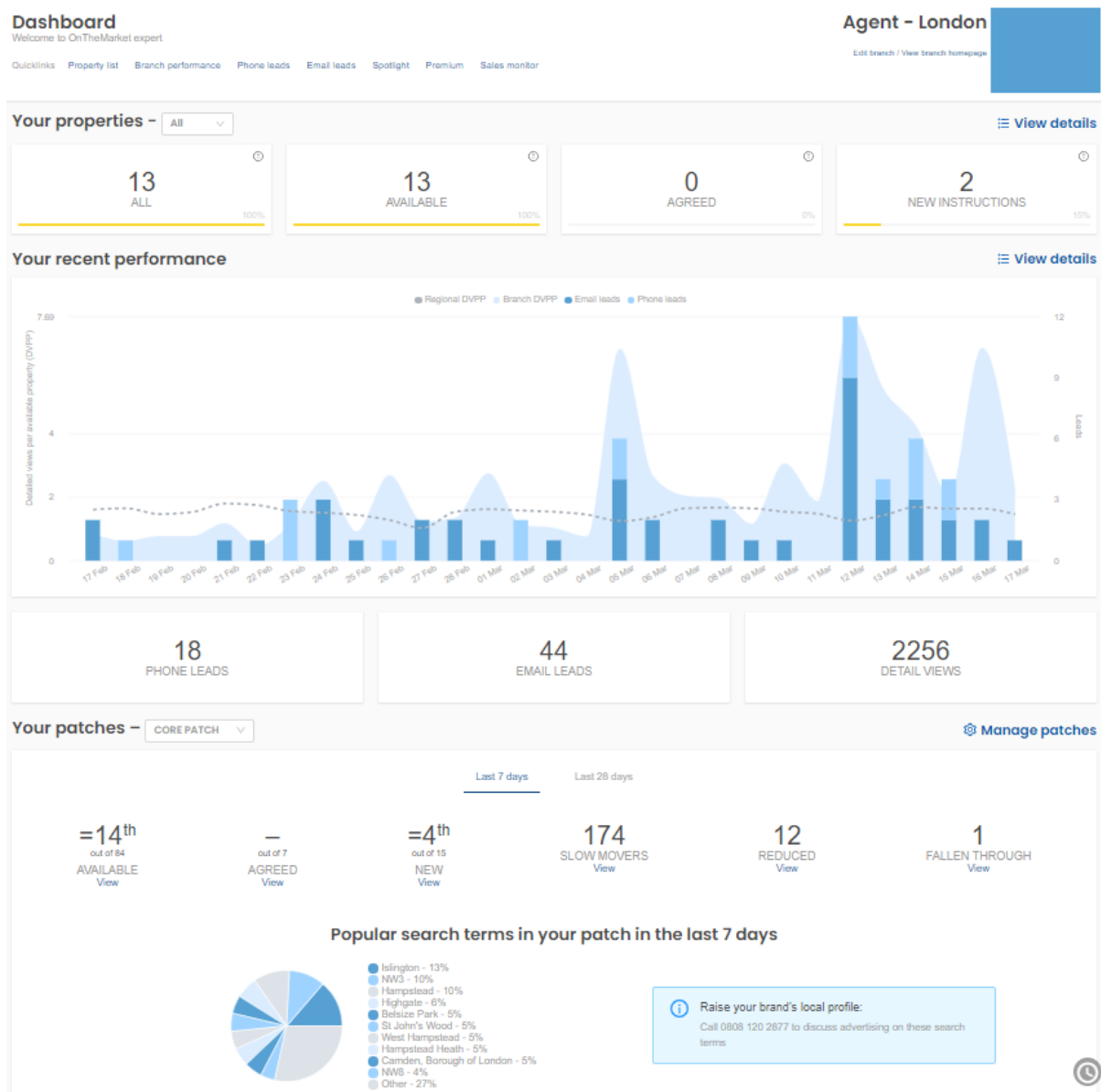
## Branch details and your properties

Jeff Gold Estates – London

123 Street Lane , South Bank, London SE1 8HP
Edit branch / View branch homepage

At the top right next to your logo are two links:

1. **Edit branch:** This directs you to an area of the system which allows you to edit key branch information such as your address, opening hours, contact details, and tenancy information.

2. **View branch webpage:** This will open a new tab in your browser to view your agent page at OnTheMarket.

Below this are four measures, which give an overview of the branch stock:
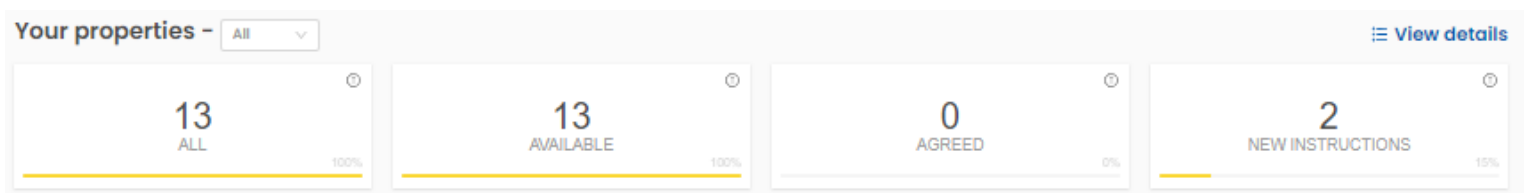
All: These are all your properties that are live at OnTheMarket, regardless of their status.

Available: This is a count of all your properties that are live and available at OnTheMarket (when they are not marked as SSTC, SSTCM, Under offer, Let agreed or Reserved.)

Agreed: These are all your properties that are live at OnTheMarket but are SSTC, SSTCM, Under offer, Let agreed or Reserved.

New: This is a count of all your properties that have been newly listed in the last 7 days.

By clicking on you can see the full list of properties we have for your branch. From this page you are able to filter the results further, as well as see the performance of each individual property.

Your recent performance

Your recent performance ≔ **View details**
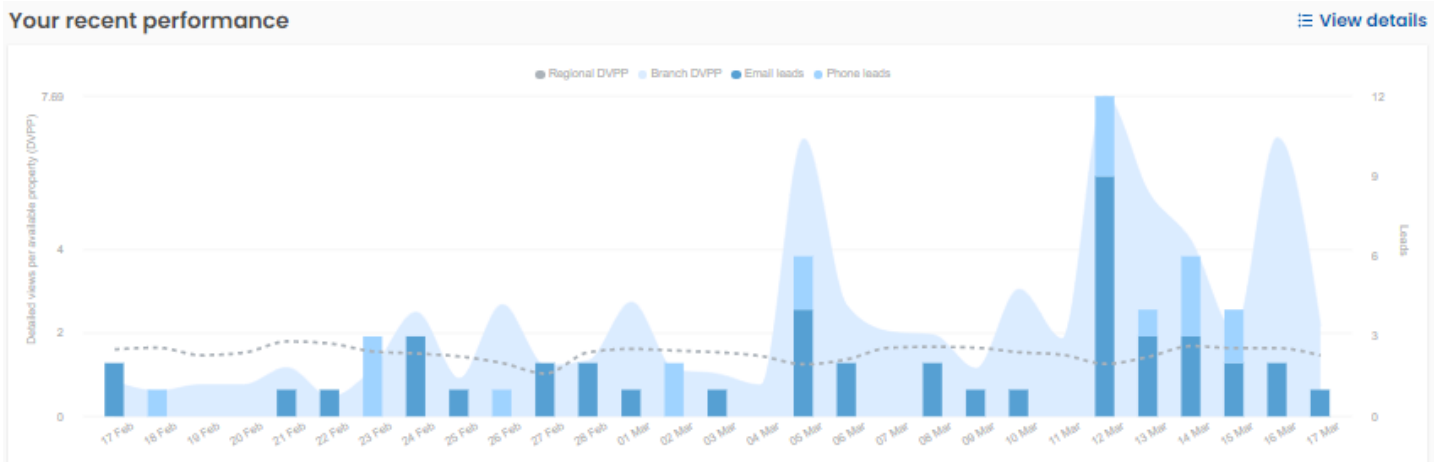
This graph gives a summary of your branch's performance over the last 28 days using three key measures. It also displays the national average clickthrough-rate to give a useful comparison to your own.

Regional DVPP: The average number of details views per available property at OnTheMarket over each day in your region. The 'Detailed Views Per Property' (DVPP) is calculated as the total number of details views at OnTheMarket divided by the total number of available properties listed that day.

Branch DVPP: The average number of details views per property listed by your branch that day. The DVPP is calculated as the total number of details views for your branch divided by the total number of available properties from you that day.

Email leads: A count of all leads sent to the branch via email. This is where a website user has requested a viewing or further information via a property details page, has sent a general enquiry email via your agent page, or via the 'contact local agents' form.

Phone Leads: A count of phone leads to the branch.

Clicking on ≔ View details will take you to the Branch performance page, giving a more detailed breakdown of the information. Here it is possible to download the data to a .csv file or to print the graph.

Your patches

The bottom section of the dashboard gives an overview of the market in a specific area and your position in relation to other agents in that area. To gain access to this information you first need to set

up a patch which should be based around your local area and feature similar properties to those you offer. See below for instructions on how to set up a patch.

Market Intel

Setting up a patch

If you don't have a new patch set up, you will see the below at the bottom of your dashboard.
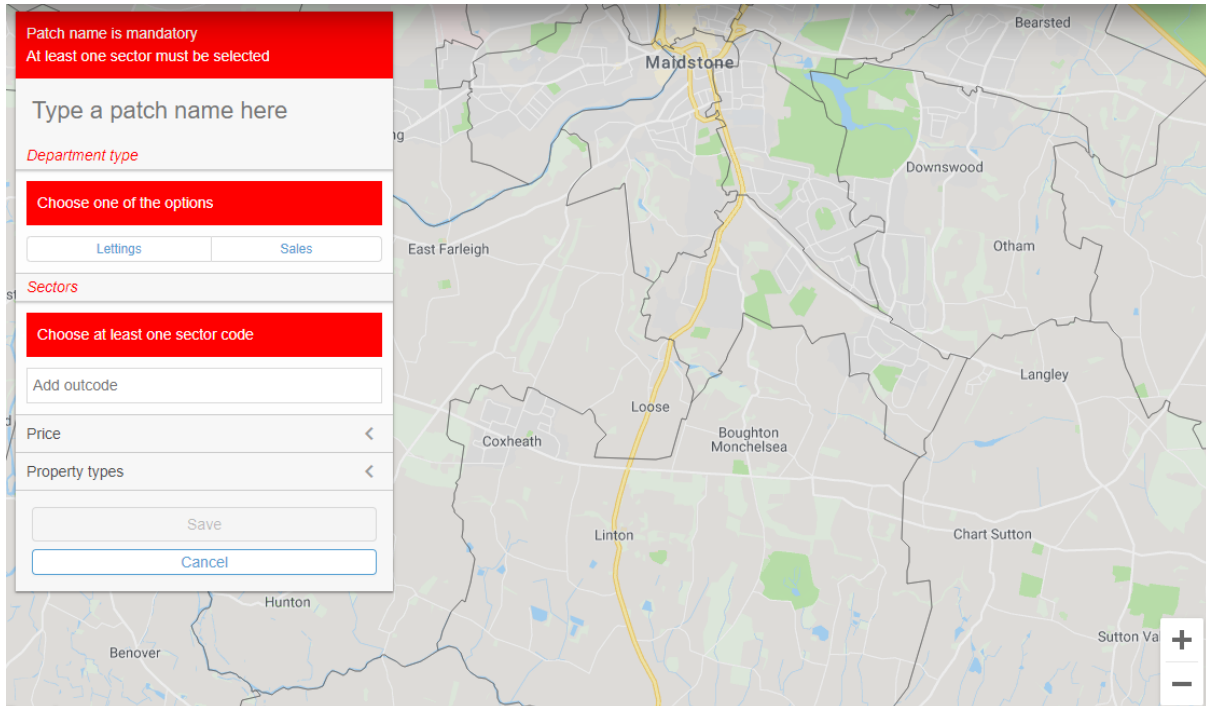

Clicking on the button will take you to the patch creation screen, where you are able to set up your first patch.

Patch creation screen:

To create a patch, you need to select the area where you operate and would like your reports tailored to. You also have to set up the following items:

Name: Give the patch a name. We recommend something that clearly describes the area and the type of instructions covered, for example, 'Maidstone Sales' or 'W1 Flats to rent'.

Department type: To be able to compare and report on data across the area, we need to know whether you're interested in sales or lettings.

Sectors: The patch needs to include at least 1 sector (a sector being the outcode and first number of the incode, e.g. ME15 6). You can add sectors using the map on the right by simply clicking on the sector you want to add and it will turn red.
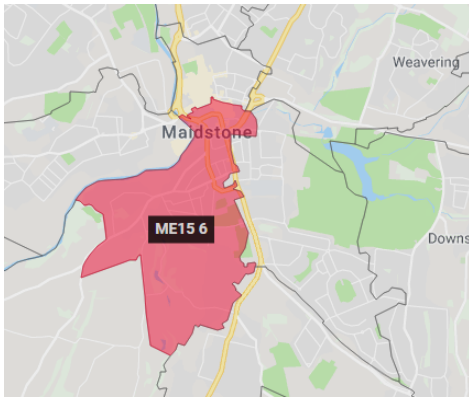
Alternatively, you can search for the sector in the text box. Here you can search for an entire outcode or directly for the sector. Once an outcode is selected, you can toggle which sectors you want within it.

There are two optional filters you can set when creating your patch:

Price: It's possible to set a lower and upper price range to further refine your patch. If you specialise in one aspect of the local market, this can be a way to narrow your patch and tailor reports to the part of the local market you're most focused on.

Property types: The patch can be set to exclude types of property. If your business focus is on certain property types, you can use this filter to refine the patch to those most relevant to you.

Once all criteria are completed, click the 'Save' option.

After you've saved your patch, you'll be directed to the 'Patch management' screen (see more details below). Here you can see the percentage of properties from your portfolio that feature in the patch you've just created.

We recommend you create patches that cover the majority of your inventory, to ensure the reports provided are relevant to you.

Patch management

You can click ⚙ **Manage patches** on from the 'Your patches' section of the dashboard to navigate to the 'Patch management' screen.
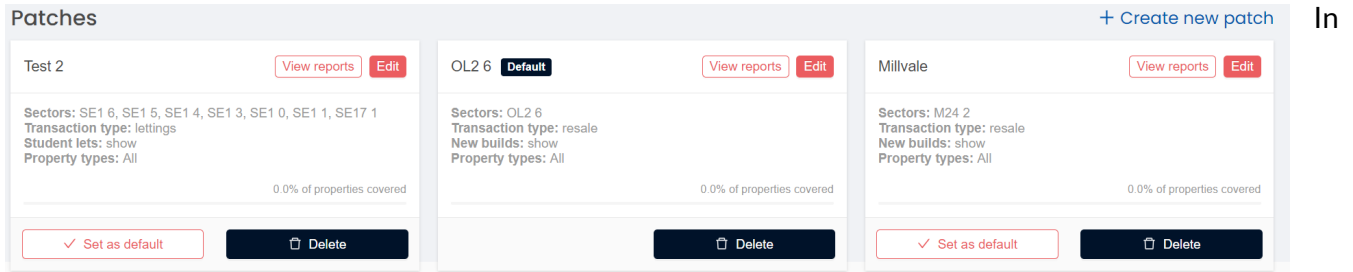
the 'Patch management' screen you're able to perform a number of administrative tasks:

Create new patch

Clicking on the **+ Create new patch** option will take you through to the 'patch creation' map. There you're able to set up a new patch following the instructions above.

Edit patch

Clicking on **Edit** for an existing patch, will again take you to the 'patch creation' map. Here you can amend the sectors the patch covers, the filters and also the name of the patch. Once you've made your changes, just click 'Save'.

Setting a default patch

Once you have a number of patches set up, you're able to set one as a default per user. This will be the patch that is loaded onto the dashboard when you first sign in.

The current default patch will have this label next to it **Default**

It's possible to change the default patch using the **✓ Set as default** button. Click this and the **Default** label will move to the selected patch. Next time you log on, reports for that patch will appear at the bottom of your dashboard.

Deleting patches

If you no longer need a patch anymore, it is possible to remove it from your account. To do this, simply

click on [🗑 Delete] and confirm that you would like to delete the patch.
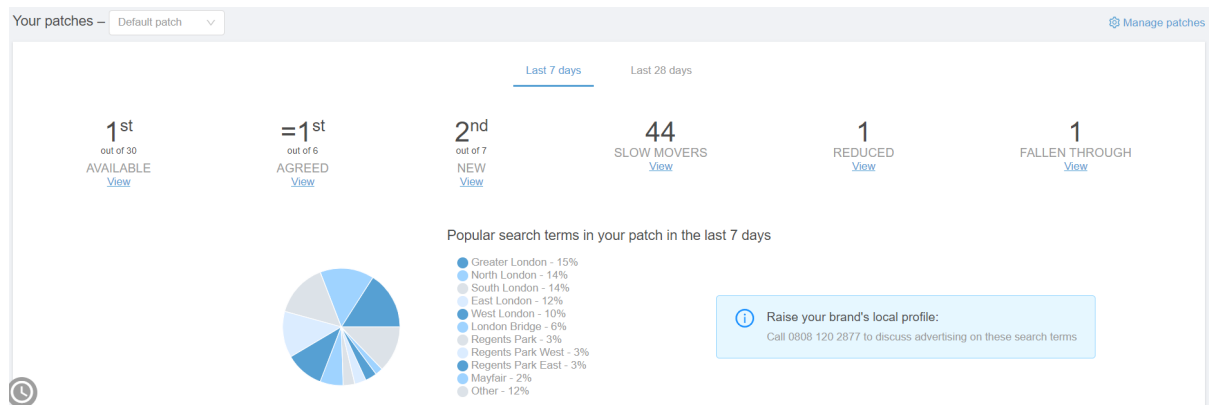
Please note, this action cannot be reverted, although it is simple to recreate any lost patches.

Patch results

At the bottom of the dashboard we use the patches you've set up to provide useful information about your branch performance, compared to other agents offering properties in your patch.

Initially, we show data for your default patch, however, using the dropdown next to the 'Your patches' heading, it's possible to change to another patch you've set up and view your ranking in that patch. This is particularly useful if you have a sales and lettings department at your branch and want to switch quickly between results for each of them.
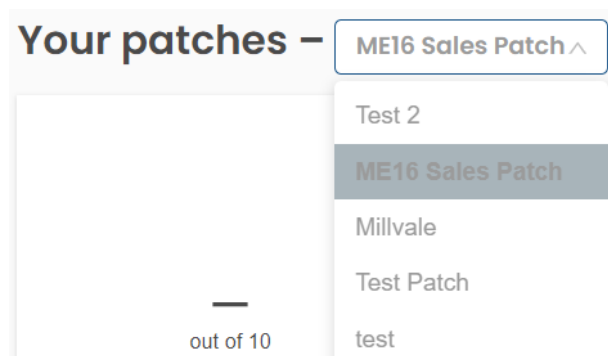
In the 'Your patch' section, we report on three key areas, where we show your ranking relative to other agents marketing properties in the selected patch:

Available (Market share): This calculation looks for all properties that have been available in your patch during the last week.

Agreed: This calculation looks for all properties that have been marked as 'SSTC', 'Under offer' or 'Let agreed' in your patch during the last week.

New: This measure looks for all properties that have been newly listed in your patch during the last week.

In addition, we provide three additional pieces of data, which could be of use when looking at the current performance of agents and properties in your patch.

Slow movers: This is a count of properties in your patch that have been listed for 12 weeks or more.

Reduced: This is a count of properties in your patch that have been reduced in the last seven days.

Fallen through: This is a count of properties in your patch that were marked as 'SSTC' or 'Let agreed' but have been made 'Available' again since.
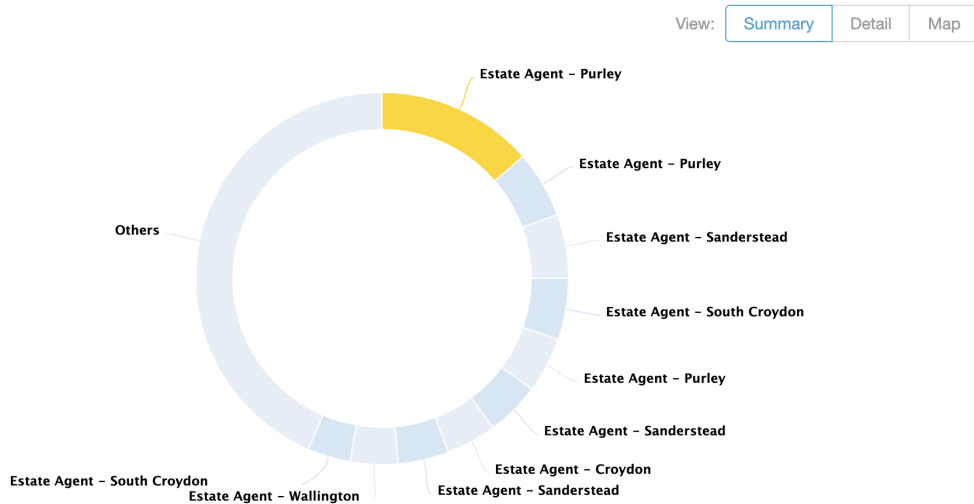
Reports

Click on ___View___ under any of the measures and it'll take you through to a more detailed report, where you can refine the patch further.

All of the reports work in a similar way, each having two views, which can be toggled using the option at the top right of the screen.

View: | Summary | Detail | Map |

Summary view

This shows a chart of the number of properties per branch that meet the patch criteria. Your position is highlighted in yellow.

View: Summary | Detail | Map

Estate Agent – Purley

Estate Agent – Purley

Estate Agent – Sanderstead

Estate Agent – South Croydon

Estate Agent – Purley

Estate Agent – Sanderstead

Estate Agent – Croydon

Estate Agent – Sanderstead

Estate Agent – Wallington

Estate Agent – South Croydon

Others

There's also a table with a breakdown of each branch, the relevant number of properties for that agent and their market share.

Detail view

This view lists the property information that meets the patch criteria.

View: Summary | Detail | Map

Address	Postcode	Price ▲	Beds	Property type	Agent branch	
Street Lane, London	SE1 8HP	POA	0	Flat / apartment	Estate Agent - London	🔗
New Road, Regents Park	NW1 4RY	£3,500,000	1	Flat / apartment	Estate Agent - Regents Park	🔗
High Street Close, Camberwell	SE5 7FH	£550,000	1	Flat / apartment	Estate Agent - London	🔗

Map view

This view displays the properties in their locations on a map. You can click on the icons to view each property at OnTheMarket.
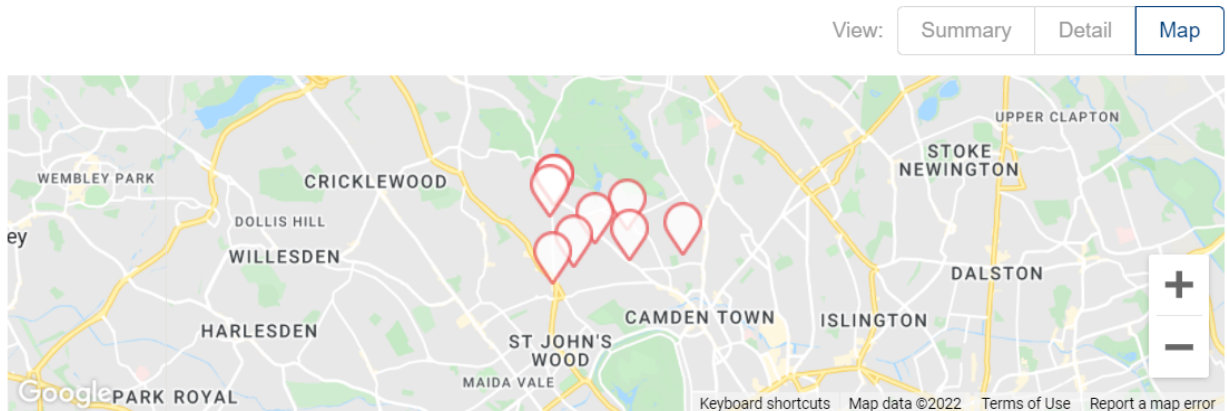
Tailoring the reports

When the report first loads, it matches the filters that were set up originally for the patch. Using the filters on the right it's possible to tailor the reports. Just click on the '<' to expand the filter.

Date

The default for all reports is the previous seven days but it's possible to extend this range to cover the last 12 months. The date range is used to look for any properties which were at, or changed to, the relevant status at any time during the date period. Whilst it's possible to look at longer date ranges, we recommend looking at periods no longer than one month. This is particularly true for the available properties report, as this can result in a significant volume of properties.

Department type

Toggle between the sales and lettings markets for the area.

Sectors

It is possible to look for data in up to 30 sectors, and there must be at least one selected for the report. In the search box, you can add a whole outcode and then toggle sectors within that outcode or you can add one sector at a time.

Price

Set a price range for the report. If looking at the rental market, the report is based on equivalent price per calendar month. Please note, the listing may be publicly advertised under a different rental frequency, however, to allow comparison, all prices have been converted to price per calendar month in this report.

Bedrooms

Set the range for the number of bedrooms in the property. 0 represents studio apartments.

Property types

Select as many property types as required. By default all are selected.

Maximum number of agents

In some patches, there may be a significant number of agents, which make the results difficult to read. To help summarise the data, we limit the number of results to the largest 20 agents in each patch, then group all others in a single result. Using this filter, it's possible to increase or decrease the number of individual agents shown on reports, before we start to group. If your agency is outside of the maximum number, we will always show your results, so you can still compare.

New build / New homes

If the sales version of the report is selected, it's possible to filter new builds. By default these are included, but it's possible to filter them so only new builds are shown or they are excluded from the results.

Student lettings

If the lettings version of the report is selected, it's possible to filter student properties. By default these are included, but it's possible to filter them so only student lettings are shown or they are excluded from the results.

Time on market

This filter is only available on the slow movers report. The default for the report is to look for properties that have been available for more than 12 weeks. It's possible to amend the time period by changing the value in this filter.

After making any changes to the filters you will need to click on ⟳ Update

This will refresh the report data. This option is only enabled if you have made changes to the report. It is possible to cancel the report run, if you wish to change the filters before the report is returned, just click on ⊘ Cancel when displayed.

Certificates

To show potential vendors and landlords your dominance in a particular area, it's possible to print off a summary report to show your ranking compared to other agents.

Once you have set up the report with the correct filters, just click on the

Generate certificate option when available. We only have this option on the 'available', 'new' and 'sold' reports. It's only possible to enable this feature when your agency appears within the result set.

The certificate will appear in a new tab as a PDF, where it can be downloaded or printed.
On the certificate we anonymise other agents and therefore, this is the only version of the report that can be shared externally.

View PDF

[View PDF]

On the 'Summary view' of the report is the option to print the report as a PDF.

This will produce a PDF of the pie chart and summary table. This report contains information that shouldn't be shared externally and therefore, is marked 'for internal use only'.

Export to CSV

[Export CSV]

In the 'Detail view' of the report, it's possible to export all of the individual properties into a CSV file, should you wish to filter or sort in other ways we have not provided. Again this report contains information that shouldn't be shared externally and is only for internal use.

Property marketing reports

These offer you a chance to generate a presentable report to your vendors displaying how their property is performing at OnTheMarket.

Sales monitor

This tool reports cases where a 'withdrawn'* property may have been sold whilst still under contract with you. It automatically compares your withdrawn properties against Land Registry and Registers of Scotland data to find any potential matches. You may also create an alert to receive updates when new potential matches have been found.

*Removed from OnTheMarket without first being marked as Under offer, SSTC, etc.

You can access the Sales monitor by selecting Sales monitor from the QuickLinks menu or by navigating to Reports -> Sales monitor through the top menu.

The tool will display a list of your withdrawn properties with an option to expand each row to view the potential matches that've been found and an option to confirm or reject each match.

Potential matches that we believe are exact matches are highlighted in blue.

Sales monitor report

This tool is designed to highlight cases where a withdrawn* property may have been sold while still under contract. It will automatically check properties withdrawn in the last 12 months against Land Registry and Registers of Scotland data to find any potential matches. You may also create an alert to receive updates when new potential matches have been found. Disclaimer
* Removed without being marked SSTC or Under Offer

QuickLinks   Dashboard   Phone leads   Email leads   Spotlight

Matches

| Potential × | Matched × |

Max time since withdrawn

8 months

🔍 Search   🔔 Create alert

Matches	Instruction ID	Address	Postcode	Bedrooms	Property type	Price	First listed date	Withdrawn date
＋ 1	8944241	43 Hadley Street	NW1 8TA	4	House	£900,000	18/07/20	23/04/21
− 1	10111530	18 Oak Village	NW5 4QP	3	House	£1,495,000	11/03/21	22/04/21

| Actions	Registry ID	Address	Postcode	Transfer price	Date of transfer
⊘ Confirm match Not a match ⊗	18OAK VILLAGENW54QP	18 Oak Village, London, Camden, Greater London, NW5	NW5 4QP	£1,430,000	30/06/21

# Filtering your results

Matches
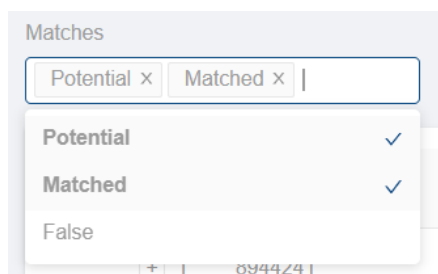
This is a multi-select option, which allows you to filter your results to see only those that you've confirmed a match with, have marked as not a match, or that have new potential matches.

Max. time since withdrawn
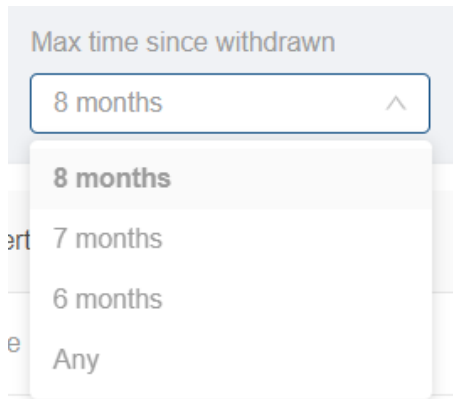
You may set a limit on the maximum difference in time between when your property was withdrawn and the transfer date in the Registry. By default, this is set to eight months which means you will see potential matches that have completed their sale up to eight months after your property was withdrawn.

Creating an alert
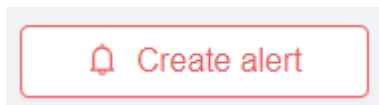
You can create an alert so you're notified when we've found new potential matches against your withdrawn properties. These alerts will be sent on a monthly basis, assuming new matches have been found.

You can unsubscribe from these alerts at any point, using the 'unsubscribe' link found in each email.

This alert will be sent to the logged-in email address at the time of creating the alert.