THE
VIRTUAL
AGENT

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THE VIRTUAL AGENT

USER MANUAL

WEB APPLICATION - VERSION 1.0

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1. Document Information

1.1. Overview

The Virtual Agent Web Application is a publically accessible web-based system that allows real-time access to a spectrum of data, through a variety of searching and social networking options. Reporting functionality has also been built into the application, allowing clients to view searches that were done in the past.

The purpose of this document is to assist new users with understanding how the web application works and provide an overview of the available features and functions.

1.2. Copyright

1.3. Disclaimer

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The sole purpose of this User Manual is to provide the registered users of The Virtual Agent with adequate information on how to operate the web application. The use of this document for any other use is prohibited.
All content of this system and its associated sub-systems are PROPRIETARY INFORMATION and remain the sole and exclusive property of the Blake Group. Metonymy and The Virtual Agent. This system may be accessed and used by authorised personnel only. Authorised users may only perform authorised activities and may not exceed the limits of such authorisation. Disclosure of information found in this system for any unauthorised use is *STRICTLY PROHIBITED*. All activities on this system are subject to monitoring. Intentional misuse of this system can result in disciplinary action or criminal prosecution.

2. Getting Started

2.1 Accessing The Virtual Agent Web Application

2.1.1 The Virtual Agent Website

To access The Virtual Agent Web Application open your preferred supported web-browser. In the URL bar that typically appears at the top of the window, enter the following Address: http://www.thevirtualagent.co.za

This will take you to The Virtual Agents website, similar to the image below. At the top right corner of the website the "Login" button will be displayed. Click on this button to login.

If The Virtual Agent Web Application is not available for any reason, the login option on the website will be greyed out, and a notification to this effect will be displayed. The image below shows The Virtual Agent website, giving the location of The Virtual Agent Web Application "Login" button.

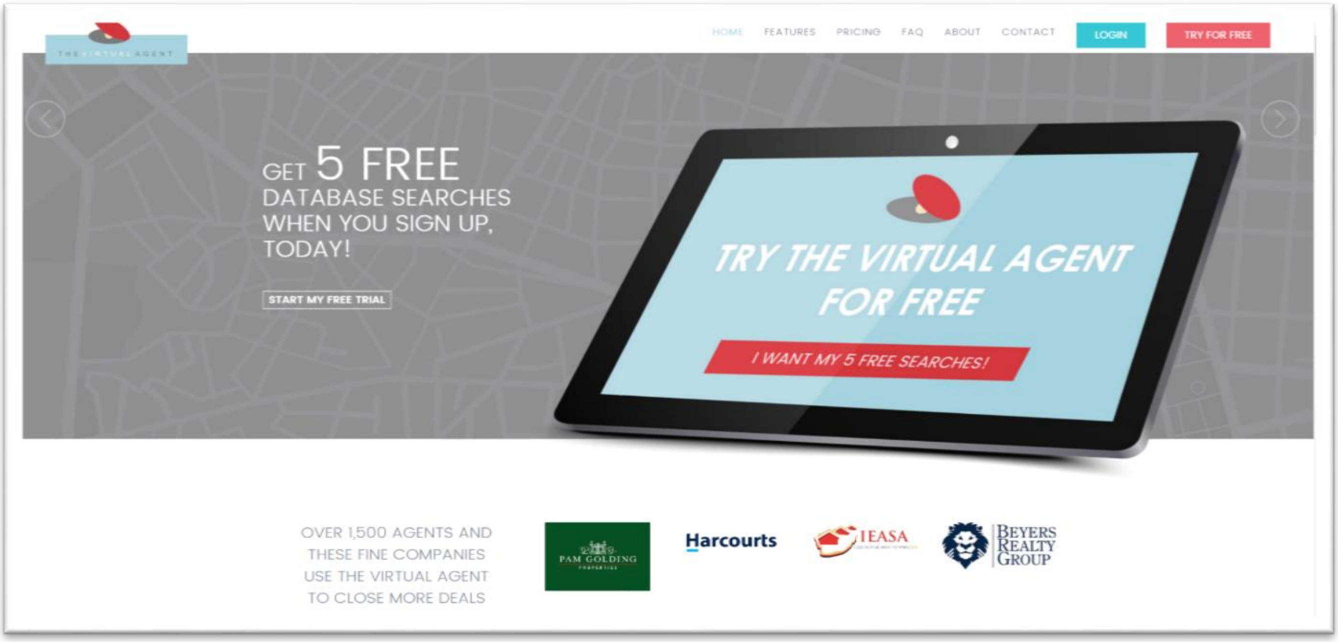


Figure 1: The Virtual Agent Website

2.1.2 The Virtual Agent Login

When you click on The Virtual Agent Web Application Login button, you will be presented with a Login screen similar to the below image.

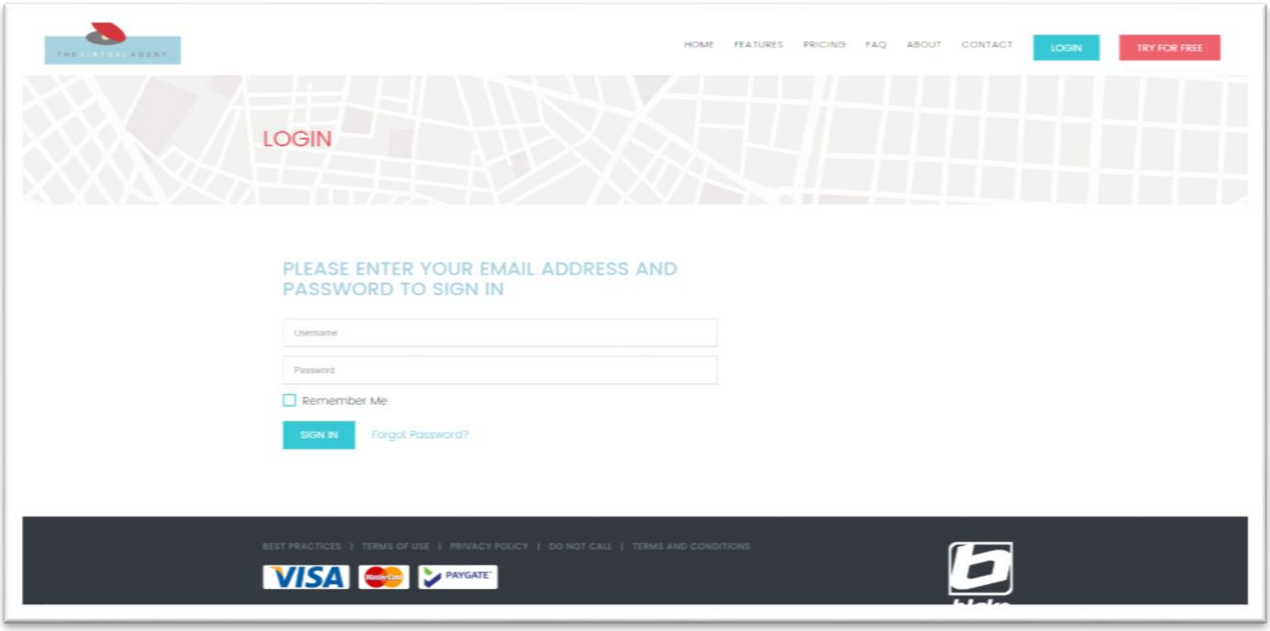


Figure 2: The Virtual Agent Web Application Login Screen

The following actions can be performed:

- Login to the system using your username and password
- Recover the password for your user account
- Access The Virtual Agent Mobile site login screen

The following information is available:

- Disclaimer policy
- Compatibility information

To login to the site enter your username and password in the fields provided and then click the “Sign in” button or press “Enter” on your keyboard. If your login was successful you will be presented with the “Homepage Search” screen. If an error was encountered you will be presented with an error message similar to the below.

Figure 3: The Virtual Agent Web Application Login Error

2.1.3 Password Recovery

If you want to re-set your password, click on the ‘Recover Password’ link on the login page – you will be presented with a page similar to the below. The process via which you would recover your password is given in

.

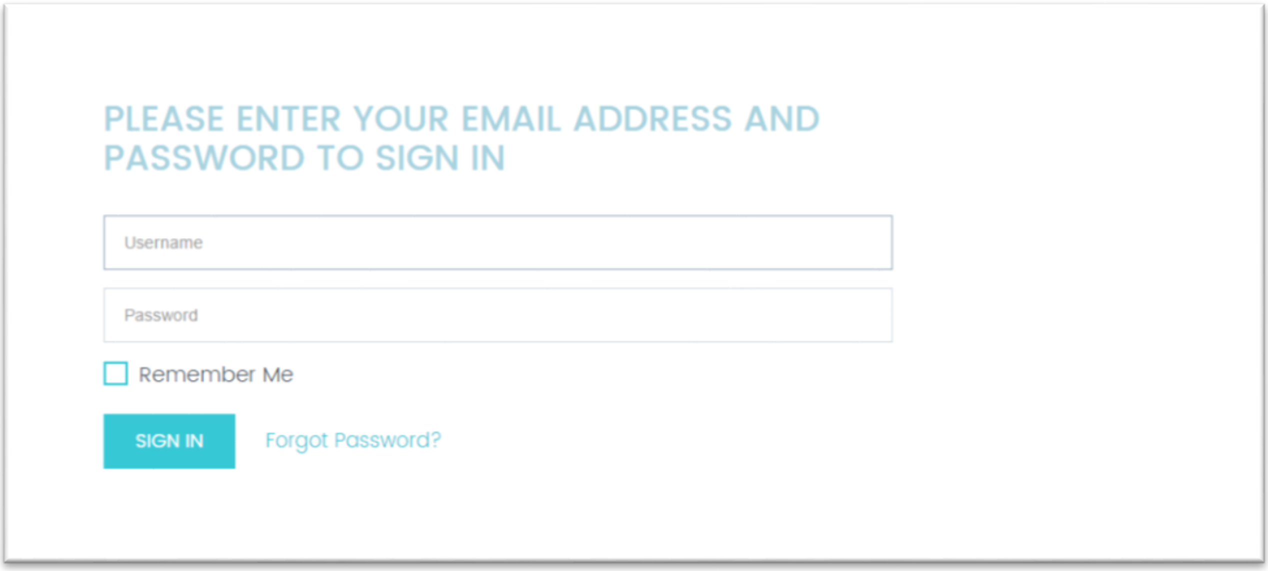


Figure 4: The Virtual Agent Web Application Recover Password Screen

The process to recover your password is as follows:

1. Click on the “Forgot Password?” link in the login screen
2. Enter your username (Your email address)
3. Click on the “Submit” button. A notification will be displayed on-screen of whether the process was initiated successfully or not.
4. The Virtual Agent will send an email to the *Admin* user(s) for the license containing a link to re-set the password. This email will also reference the username for which the password will be re-set.
5. When the license admin user clicks on the link in the email they confirm that the email may be re-set. The link will take them to a page indicating that the password has been re-set.
6. The Virtual Agent will send an email to the admin user(s) for the license containing the new password.
7. The admin user will then convey the new password to the relevant user.

Note that the link provided in the email in step 4 above is **only valid until midnight** on the day that the e-mail was sent out. If the admin user has not clicked on the link by this time, the link expires and the password remains the same.

3. System Details

3.1 The Virtual Agent Web Application: Background

The Virtual Agent's Application is a publically accessible web-based system that allows real-time access to a spectrum of data through a variety of searching and social networking options. The product offers an easy to use complete solution to clients, including:

- Advanced tracing on a range of input criteria including, but not limited to, combination, sounds like and wildcard searches
- Autocomplete functionality on search input
- A single, holistic view of an individual
- Social networking on all relevant displayed information
- Person-specific relationship suggestions
- Property reports
- Contact score
- Living standard measurement
- On-demand reports available directly from the application for users

This user manual will guide you through all the important features of The Virtual Agent's Web Application. If you require more information on any of the features please contact Blake / Interactive Solutions.

3.2 Accessibility

The Virtual Agent's Web Application is accessible to clients that hold a Contract, Pre-paid or Web Service License, however different functionality is available to different license types. If you have one of these licenses and cannot access the system, please contact your sales representative.

3.3 Browsers

The Virtual Agent Web Application is an online, web-based system and because of this it has been tested on all major browsers.

As at publishing this document, The Virtual Agent Web Application will run on the following browsers:

- Apple Safari (*5.1.4*)
- Google Chrome (*17.0*)
- Microsoft Internet Explorer (*9.0*)
- Mozilla Firefox (*11.0*)
- Opera (*11.60*)

> It is important to note that the browser being used on the device must have JavaScript (or ECMAScript) enabled and activated on it in order for the web application to function properly.

4. Homepage and Search Functions

4.1 Homepage Layout

The following diagram depicts the TVA homepage and their associated functionality.

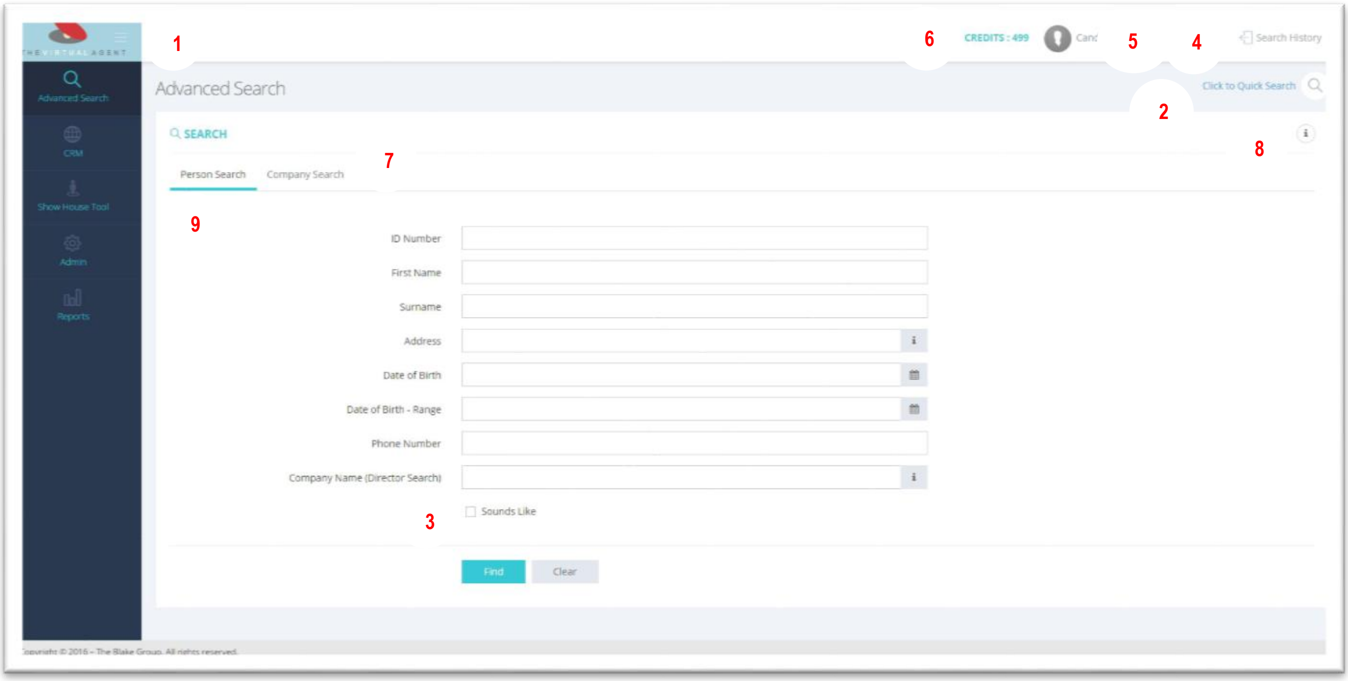


Figure 5: The Virtual Agent Homepage

4.2 Homepage Layout Descriptions

No.	Item	Item Description
1.	Menu Bar	This bar is available on all pages and will allow you to navigate back to the main Search page, Contact Information page, Dashboard Reporting, View this Help File, Logout of the system, or view search History for the current session.
2.	Quick Search	The Quick Search panel is exactly what it says it is. It is always available on all screens so that it allows a quick search wherever you are on the system. This panel is limited to the most popular search fields. For a detailed search, click on “Search” on the menu bar.
3.	Sounds Like Check Box	This Check box can be used to indicate whether you will accept search results with criteria which sound similar to the criteria entered into the Name, Address or Company Name fields.
4.	History Button Search History	Once you have performed one or more searches during the current session, the history button will show the details of the searches done in that session.
5.	User	This displays your Username currently logged on to the system.
6.	Credits	Credits Remaining on your account.
7.	Advanced Person Search Advanced Company Search	You are able to search for individuals or companies by selected the appropriate tab.
8.	Information Tooltip	Upon hovering over this icon, a tool tip is displayed to show you some of the functionality that is offered in this section.
9.	Search Fields	Advanced Person Search

		Address – This field allows users to search for an address, including complex names, estate names, ERF number, suburbs etc. Hovering over this field pops up a tool tip highlighting the searchable criteria you could use. ID Number – This is linked to South African ID numbers (13 digits) – If you only have the first 10 digits of the ID number you could use the wild card character (notated by the star symbol (*)) to open up your parameter search (For Example: 700101123456*) First Name: First Name of the individual you are searching for. Surname: Surname of the individual you are searching for. Date of Birth: Date of birth of the individual you are searching for. Date of Birth Range: If you are searching for a batch of individuals of a certain age or Birth day, this criteria will work for you. Phone Number: Using this field can be used to search for a cell phone number of an individual. **Advanced Company Search** Company Name: Name of company you are looking for. Company Reg. No.: This can be used when you have the company registration number for a more accurate result. Address: Use this field to search for a company with this address. Phone Number: Use this field to search for a company with this phone number.

Note:

- Menu: The User Details, Search and other Menu items (Contact, Dashboard, Help, Logout and History) as well as the Quick Search Menu are displayed at all times while the History Bar (right) and Page Relevant Menus are displayed when relevant.

- Pages accessed through the menu buttons (both in the Main Search Menu and in the Quick Search menu) will open refreshed set of results.

- Auto-Complete: In the Surname, First Name and Company Name fields auto-complete options are given while you are typing.

- Wild-Card Search: In all search criteria input fields you can use an asterisk to denote a wildcard, hereby indicating to the system that you will accept results with any characters in the place of the asterisk (e.g. a search on the first name: 'Ric*' may include results with the first name 'Richard', or 'Ricardo').

- Address Search: You can enter any portion of an address or the entire address into a single address field.
  If the address contains commas, each phrase between commas in the address is searched for separately. If an address is found in our system that contains each phrase in the criteria, it is considered a match.
  If the address does not contain commas, each word in the address is searched for separately. If an address is found in our system that contains each word in the criteria, it is considered a match.
  An address search refers to a search in address details only, and not in property ownership address details.
  In order to perform a search, you will need to enter at least one search criteria in any of the fields provided and then click the "Find" button or press "Enter" on your keyboard. If you do not enter any search criteria, you will be presented with an error message.

- Input Validation: The system performs validation on several of the search input fields before performing the search. The following validation is done:

Input Field	Validation
ID Number	The ID Number must be 8 to 13 characters long and contain numeric values only.
Date of Birth	If a user selects both a DOB and DOB range, the DOB takes preference.
Date of Birth Range	If a user selects both a DOB and DOB range, the DOB takes preference. The range is taken to include any start and end dates provided.
Company Registration Number	The Company Registration Number may contain numeric values and a forward slash "/" only.
Phone Number	The Phone Number may contain numeric values only.

4.3 Available Pages

The following pages are available on The Virtual Agent Web Application:

- Reports
- Advanced search
- CRM
- Show House Tool
- Admin
- Help Desk

The Reports, Advanced Search, CRM, Show House Tool, Admin and Help Desk pages are accessible through the Quick Access Menu and the menu on the left hand side bar of the screen, when applicable.

The Search Results, Person Detail and Company Detail pages are available via the Search page.

The Full Audit and Summary Audit Report pages are available via the reports page.

The system will open on:

- The Search page if search functionality is available to the user
- The Admin page if search functionality is not available to the user

5. Result Set Page Layout

Various result sets – or tables – are displayed on the Results and Details pages. You can edit each of these result sets to make the data more accessible. The below diagram shows the different functionalities available on each result set.

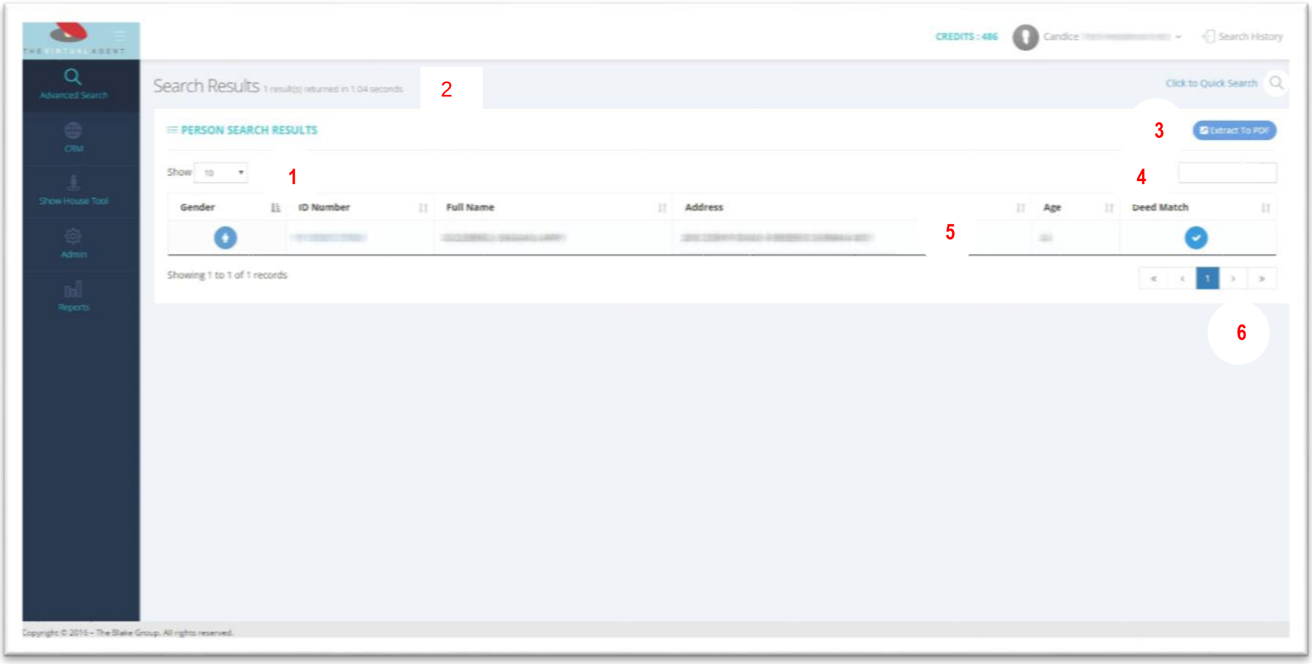


Figure 6: Person Results Page

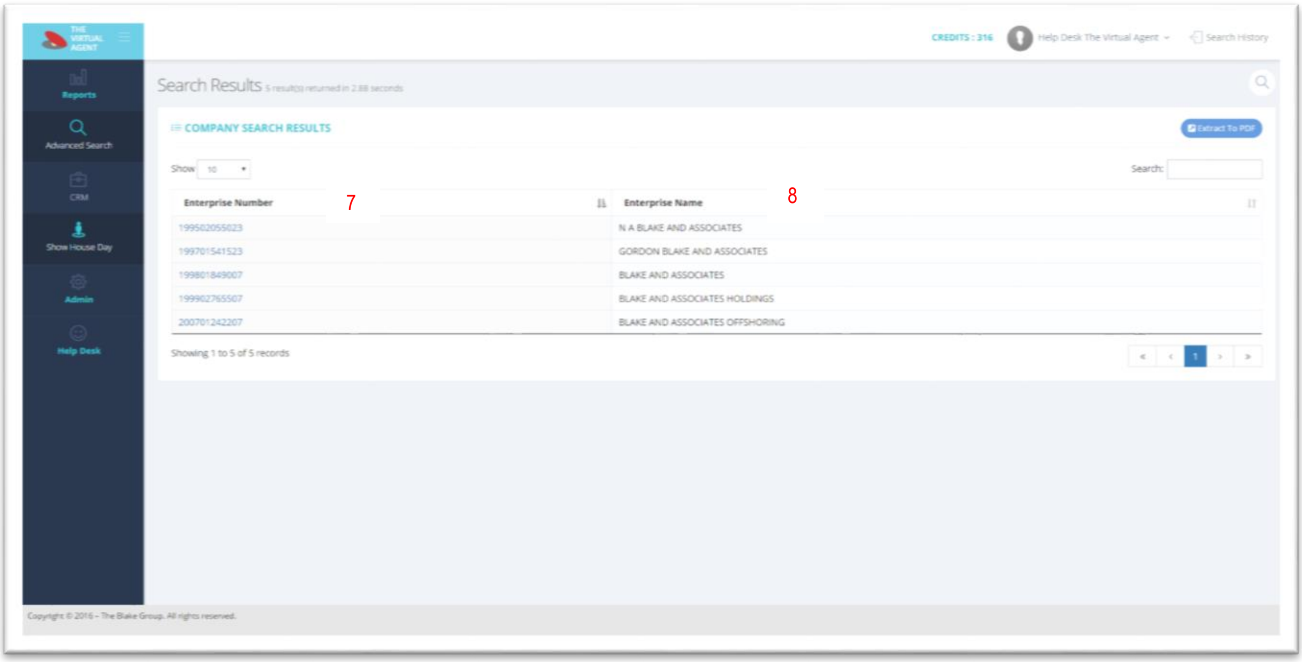


Figure 7: Company Results Page

5.1 Result Set Page Layout Descriptions

No.	Item	Item Description
PERSON		
1.	Show Entries	This feature allows you to select the number of results that you want to see on one page.
2.	Search Message	The search message summarises the number of results found as well as the time it took to return your result.
3.	Export	The Export button allows the user to export the entire search result to PDF format. This report will display all the fields as you see them on the results page.
4.	Search	This nifty little tool allow you to quickly search within your search results for a more specific detail. You can filter a result set on any word or value by typing this word or value into the filter text box. This means that only results containing this word or value in one of the fields will be displayed. (I.E. you could search for parts of a name or surname or ID number etc.)
5.	Results Header	The results page shows the basic detail of the person or company. This page covers, Gender, ID Number, Full Address, Name / Surname, Age and Date of Birth.
6.	Pages	If there are multiple search results, there will be multiple pages for your results. Use these buttons to navigate through the search results.
COMPANY		
7.	Enterprise Number	This is the company registration number.
8.	Enterprise Name	This is the company name that was searched for.

Note:

- **Sort**: By clicking on a column header or on the arrows to the right of the column header the entire result set is sorted on this column. By clicking on the column header again the result set is again sorted on this column, but in the reverse order (ascending/descending values). A red arrow to the right of the column header will indicate which column, in which order, the result set is currently sorted on.

5.2 Searching for a Person or Company

5.2.1 Search Inputs and Validation

The Virtual Agent Web Application utilizes advanced tracing technology to enable users with any of a range of input criteria to pinpoint a single individual or enterprise.
You can initiate a The Virtual Agent search from two different points within the application – the Search Bar which is always displayed on the left hand side of the application, or the (Advanced) Search page, which is accessed through the Quick Search Menu at the top of the page. Both these sections initiate a search in the same way; however more search options are available on the Advanced Search pages.

5.2.2 Results Pages

Once the system has done its initial validation of your search criteria (as indicated in the previous section) your search will be performed and you will be presented with the Results page. The Results page contains a list of all entities (people or companies) found in The Virtual Agent database that match your search input criteria. The results page can take on one of three formats, based on whether your search criteria contained any Company criteria, and whether any results were found for your search.

6. Profile Detail Pages

By clicking through on an ID number, company registration number or company name in the Results page, you can access the Person Detail and Company Detail pages. These pages give more details about the person or company. The Person Detail page may include, but is not limited to, biographical details, contact numbers, e-mail addresses, address details, employment details, property ownership details, directorship details, and relationship links (people the individual is linked to on The Virtual Agent database). The Company Detail page may include, but is not limited to, general company details and director details.

6.1 Person Detail Page

The Person Detail page gives details linked to a specific ID number on The Virtual Agent database. These details are divided into various different sections containing specific information for one of the following categories:

- Biographical
- Contact Numbers
- Addresses
- Employment
- Directorships
- Property Ownerships
- Relationship Links

The data returned for each section (except for the biographical details) is given in a result set which has all the functionalities discussed in section ⍰. If there is no data available for a section, the section is displayed but minimized.

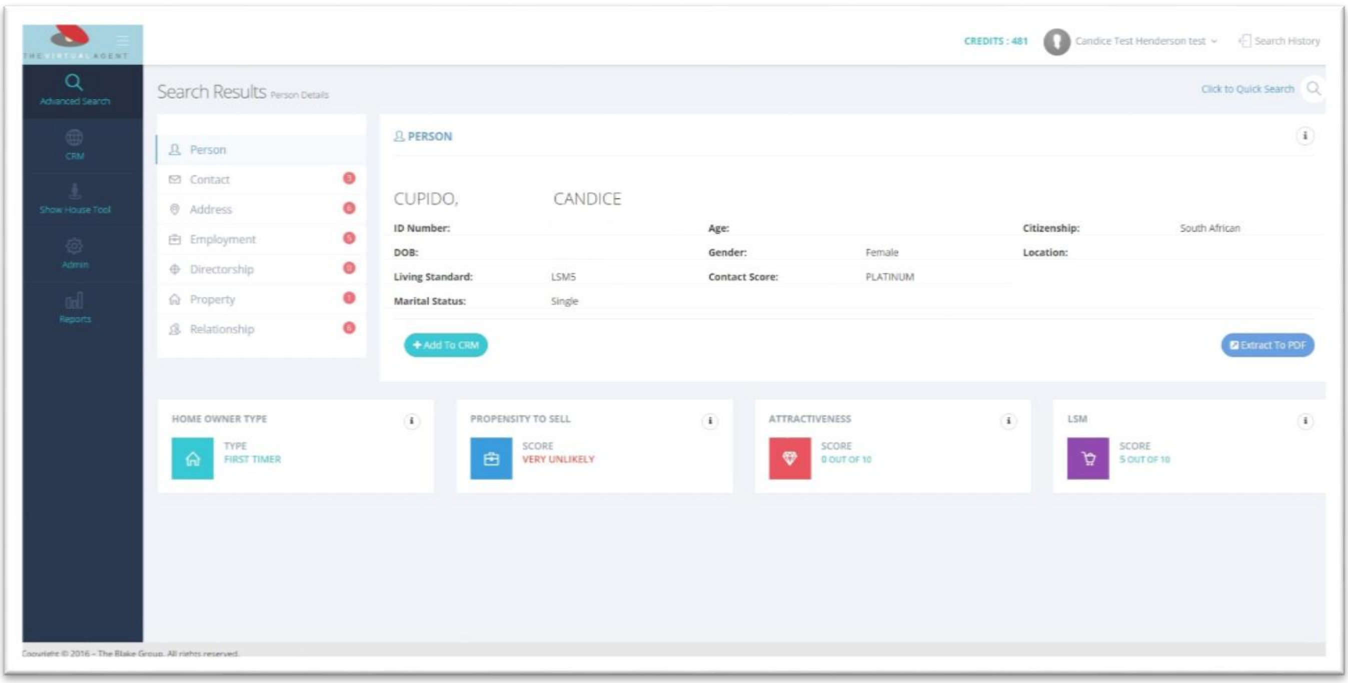


Figure 8: Profile Page

6.1.1 Biographical Details

The following information is available in the Biographical Details section:

- Name
  This is given as part of the section header
- ID Number
- Age
- Citizenship
  There are 2 possible values here: "South African" and "Other"
- Date of Birth (DOB)
- Gender
- Location
- Population Group
  There are 3 possible values here: "Black", "Indian" and "Other"
- Living Standard
  This is a score of the individual's living standard, based on financial data within The Virtual Agent database. The score can be between 1 and 10, 1 being the lowest score, and 10 the highest.
- Contact Score
  This is a score based on the contact number data linked to an individual. There are 5 possible contact scores: "Platinum", "Gold", "Silver", "Bronze" and "Dirt". An individual with a "Platinum" Contact Score is considered to have a high probability of being contacted on the contact numbers provided.
- Deceased Status
- Deceased Date
  This is only displayed when the Deceased Status is "Deceased"
- Cause of Death
  This is only displayed when the Deceased Status is "Deceased"
- Marital Status

6.1.2 Contact Numbers

The following information is available in the Contact Number Details result set:

- Type
  The contact number type is depicted using an icon plus a tooltip which is displayed when you hover over the icon.

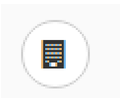


Figure 5: Contact Number Type Icon – Work Number

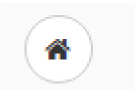


Figure 6: Contact Number Type Icon – Home Number

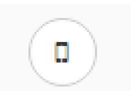


Figure 7: Contact Number Type Icon – Mobile Number

Figure 8: Contact Number Type Icon – E-mail Address

- Telephone Number/Email Address
- Date

6.1.3 Address Details

The following information is available in the Contact Number Details result set:

- Type

  The address type is depicted using an icon plus a tooltip which is displayed when you hover over the icon.

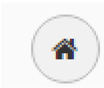


Figure 9: Address Type Icon – Physical Address

Figure 10: Address Type Icon – Postal Address

Figure 11: Address Type Icon – Home/Postal Address

- Address

  The actual address is given as: address line 1, address line 2, suburb, city, postal code (address line 2 is displayed only when this is not empty).

- Province
- Date

6.1.4 Employment Details

The following information is available in the Employment Details result set:

- Occupation
- Employer
- Date

6.1.5 Directorship Details

The following information is available in the Directorship Details result set:

- Enterprise Number
- Enterprise Name

  *The Enterprise Name field contains a **hyperlink** to the Company Detail page of the company.*
- Directorship Status
- Date

6.1.6 Property Ownership Details

The following information is available in the Property Details result set:

Details given in the Property Transaction Details box include, where available:

- *Seller Name and ID (where this seller is not the individual whose Person Detail page is currently being displayed)*
- *Buyer Name and ID (where this buyer is not the individual whose Person Detail page is currently being displayed)*
- *Sale Price*
- *Sale Date*
- *Bond Amount*
- *Transfer Date*
- *Property Number*
- *Property Portion Number*

- *Dwelling Size*
- *Property Area*
- *Title Deed Number*

6.1.7 Relationship Links

The relationship links result set gives a list of people linked to the current individual in The Virtual Agent database. Links via contact numbers and directorship are displayed, and the individuals with the highest scoring links (i.e. linked to a more recent number/directorship detail, or linked to more than 1 entity at once, etc.) are displayed. The below image depicts a typical Relationship Links result set.

The following information is available in the Relationship Links result set:

- Link
  The relationship link will give details of whether the link is via a contact number or company registration number and give the actual contact number/company registration number the individuals are linked through.

Figure 12: Relationship Links Icon – Link

- Type
  The link type i.e. "Contact Number" or "Directorship"
- ID Number
  *The ID Number field contains a **hyperlink** to the Person Detail page of the individual the current individual is linked to.*

- Full Name
  The full name of the individual the current individual is linked to is given as: surname, names

7. Reports Page

The Reports page contains reports of your usage during set time periods.

7.1 Full Audit Report

The Full Audit Report allows you to view your usage between any two dates. All searches performed during this time are displayed in a result set with the functionalities given above. Reports are available up to the previous day.
The following fields are given for each search:

- User
- Date
- Result
  Positive: *At least one result was found for the search*
  No Result Found: *No results were found for the search*

- Credits Used
- Search Type
  Search: *A search initiated by entering criteria on the search bar or page*
  Lookup: *A search initiated by clicking on an ID number or company registration number*
  Social Network: *A search initiated by clicking on any detail other than an ID number or company registration number*

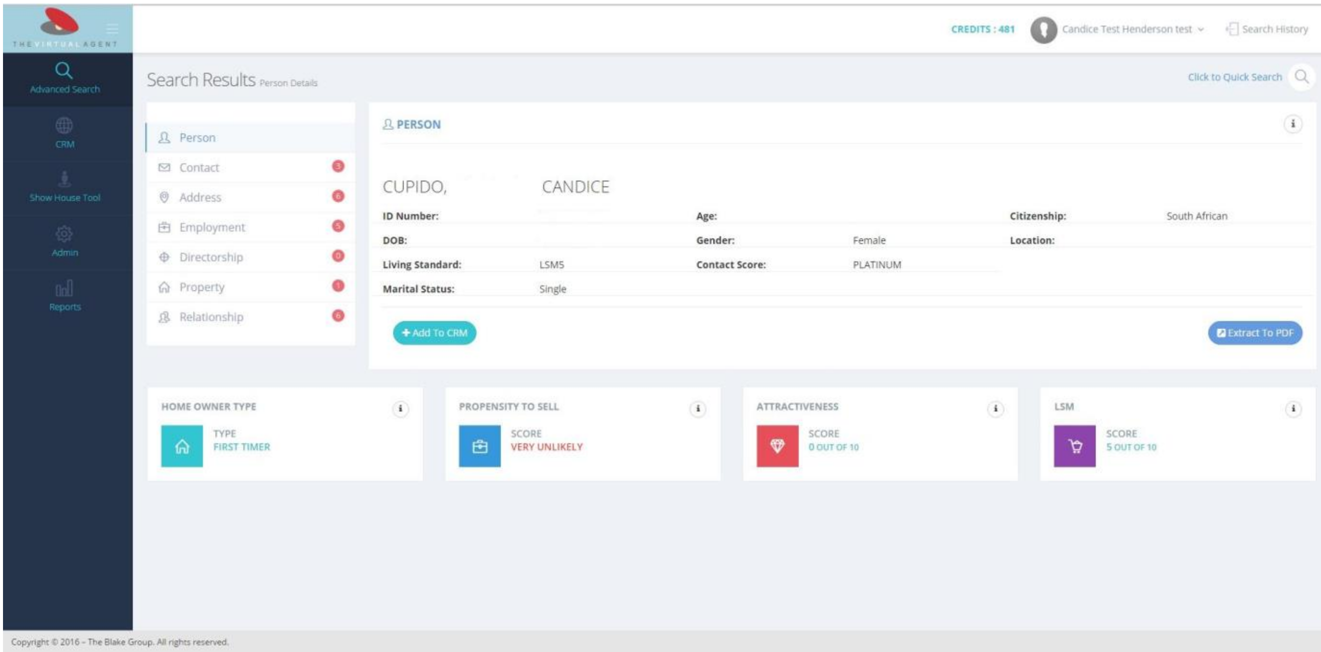
- Search Criteria

The search criteria can include an ID Number (ID), Surname (SN), First Name (FN), Date of Birth (BD), Phone Number (P), Address (A), Company Name (CN) and Company Registration Number (CR). A key is given at the bottom of the table.

The image below displays the Full Audit Report for the current user from the 1st March 2012 to the 10th April 2012. Each search performed on the system by the user during the time period is given.

8. CRM & FUNCTIONS

8.2 Adding a client to your CRM



No.	Item	Item Description
1.	Add to CRM	Click on the Add to CRM button and it will instantly add this person/ Company to your CRM
2.	Extract to PDF	Extracting to PDF will download all the information you have on the individual/company and extract it to PDF.

8.3 CRM Dashboard layout

The following diagram depicts the CRM dashboard and their associated functionality

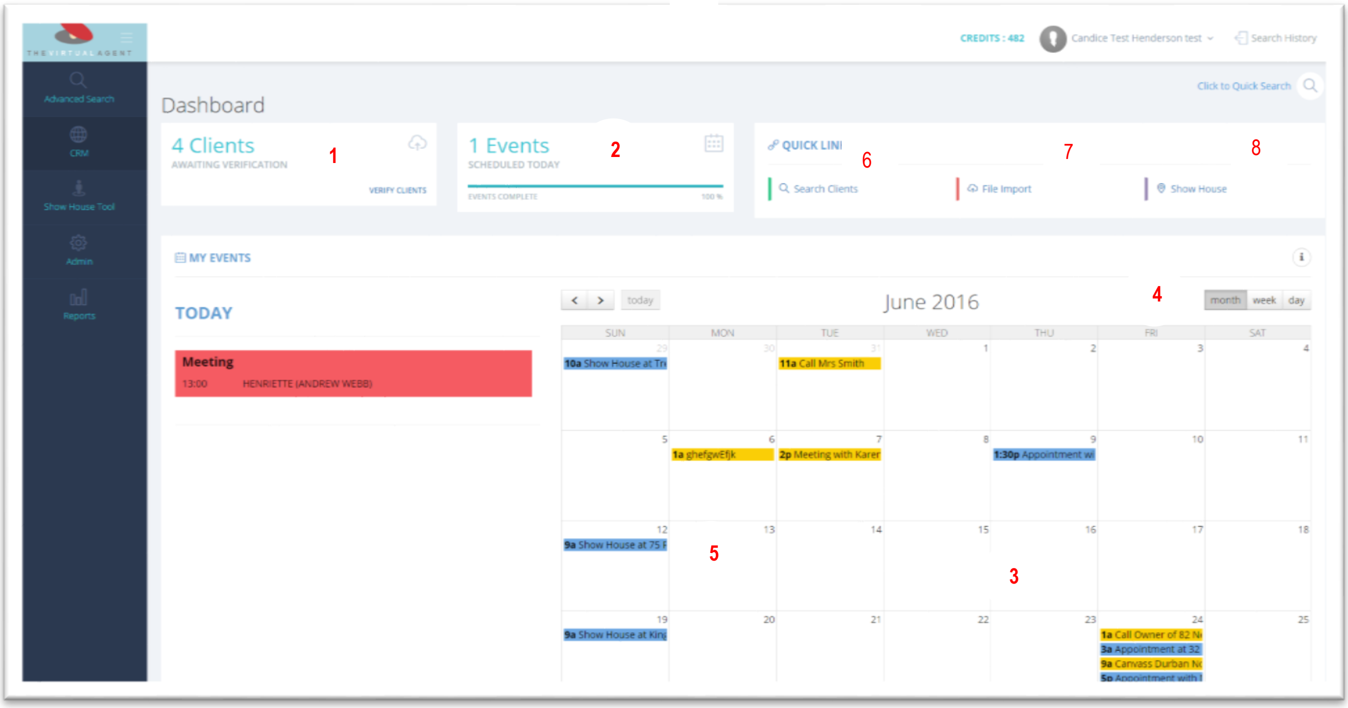


Figure 9: CRM Dashboard

8.2 CRM Dashboard Results page layout descriptions:

No.	Item	Item Description
1	Client Verification	Verify your clients against The Virtual Agent's database
2	Day's Events	Take a quick glance at your events scheduled for the day
3.	Calendar	Add your scheduled appointments and reminders to your diary by simply clicking on the relevant days tab and add your event
4.	Calendar options	View your diary by month, week or day by simply clicking on the relevant tab.
5.	Drag & Drop	Use our nifty feature to drag and drop your events In the relevant day. Simply click on the event and drag it to the relevant date.
6.	Search Clients	Search your clients by clicking on the search clients quick link
7.	File Import	Import your clients by clicking on the File import quick link
8.	Show House	Click on the Show house quick link to view your show house clients

8.3 CRM -Import Client Base

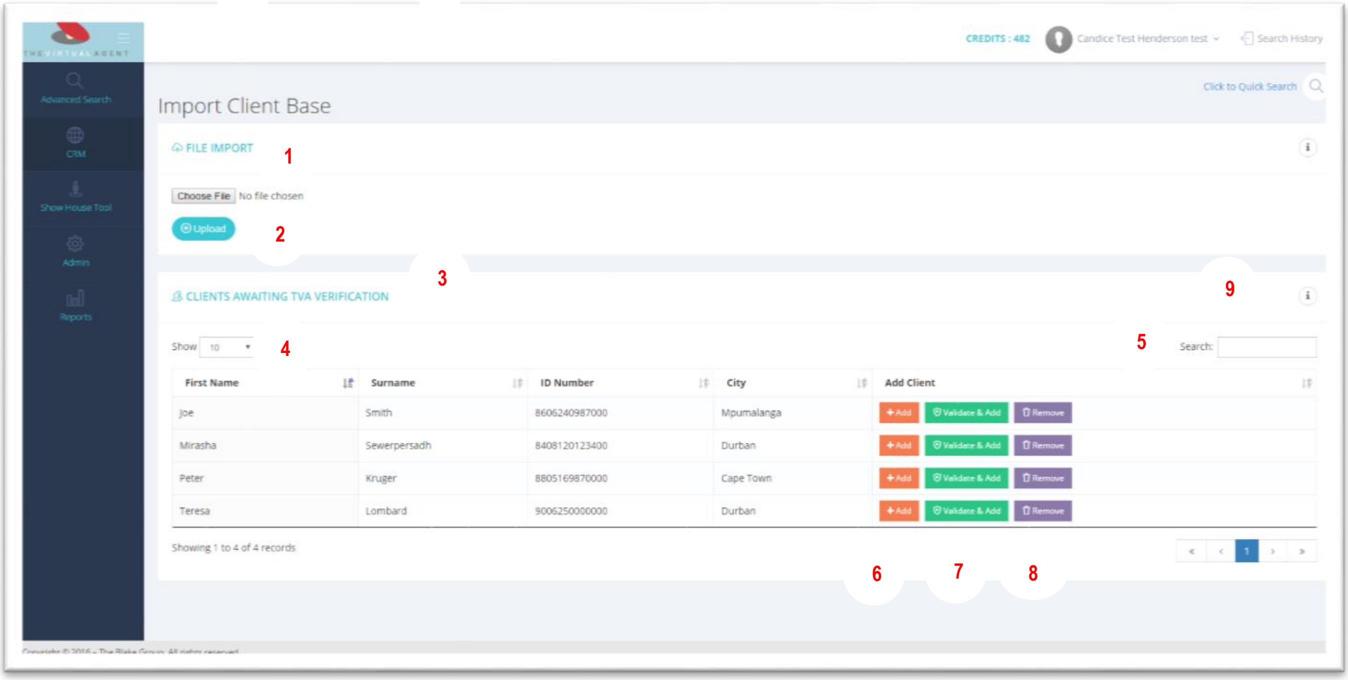
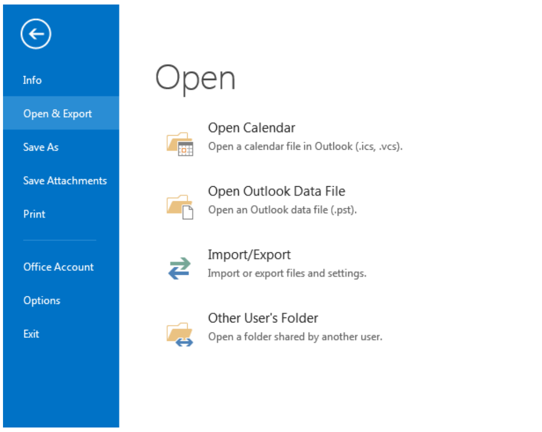


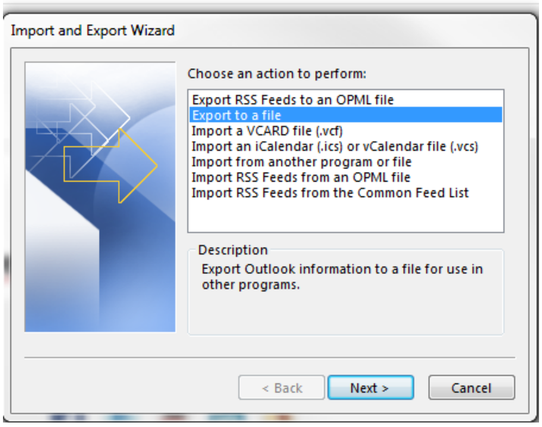
Figure 10: CRM Import Client Database

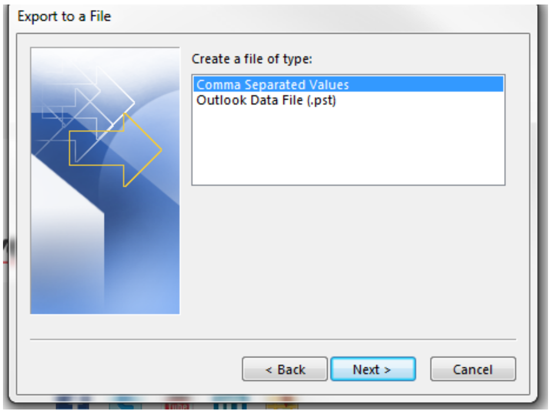
8.4 CRM- Import Client Base Results page layout descriptions:

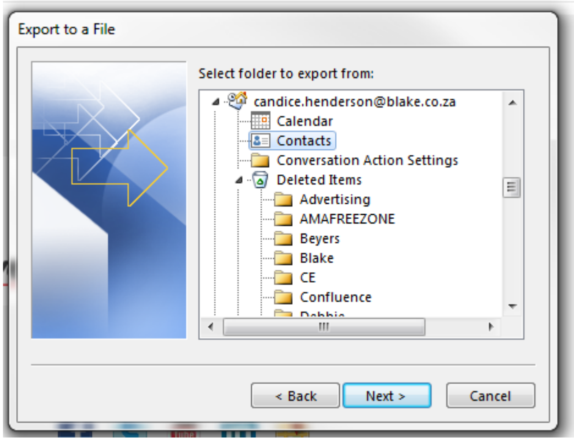
No.	Item	Item Description
1.	Choose File	Click 'Choose File' and add your relevant database. Make sure your data is in an excel , CSV or Text format
2.	Upload	Once your database is added, click 'Upload' to upload your client base into your CRM
3.	Clients Awaiting TVA Verification	Once your client base has been uploaded, a list of your clients waiting TVA verification will pull up as per the diagram
4.	Show Entries	This feature allows you to select the number of results that you want to see on one page.
5.	Search	This nifty little tool allow you to quickly search within your search results for a more specific detail. You can filter a result set on any word or value by typing this word or value into the filter text box. This means that only results containing this word or value in one of the fields will be displayed. (I.E. you could search for parts of a name or surname or ID number etc.)
6.	Add Client	Click the '+Add' button to add the client to your Database
7.	Validate & Add	Click the ' Validate & Add' button to validate the individual against the TVA database and add it to your Client base
8.	Remove	Click the 'Remove' button to remove the individual from your CRM database
9.	Information Tool tip	Upon hovering over this icon, a tool tip is displayed to show you some of the functionality that is offered in this section.

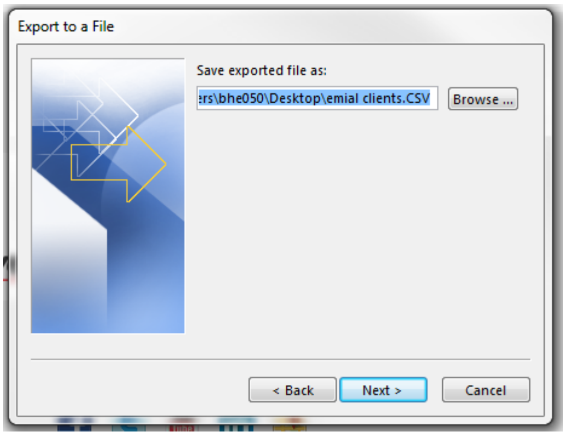
8.5 Exporting data from Outlook

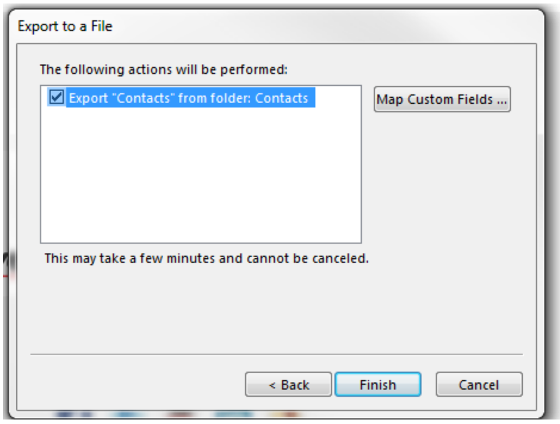


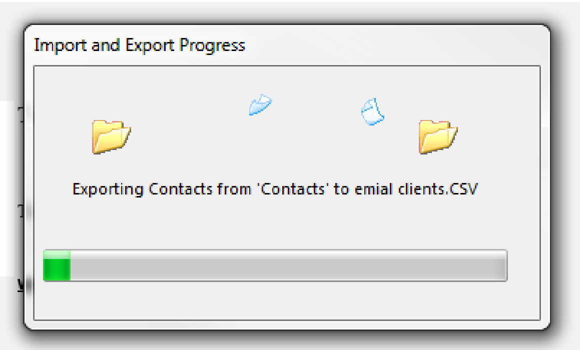





Export to a File
Select folder to export from:
candice.henderson@blake.co.za
Calendar
Contacts
Conversation Action Settings
Deleted Items
Advertising
AMAFREEZONE
Beyers
Blake
CE
Confluence
< Back
Next >
Cancel


Export to a File
Save exported file as:
rs\bhe050\Desktop\emial clients.CSV
Browse ...
< Back
Next >
Cancel


Export to a File
The following actions will be performed:
Export "Contacts" from folder: Contacts
Map Custom Fields ...
This may take a few minutes and cannot be canceled.
< Back
Finish
Cancel


Import and Export Progress
Exporting Contacts from 'Contacts' to emial clients.CSV

8.6 CRM- Search Current Client

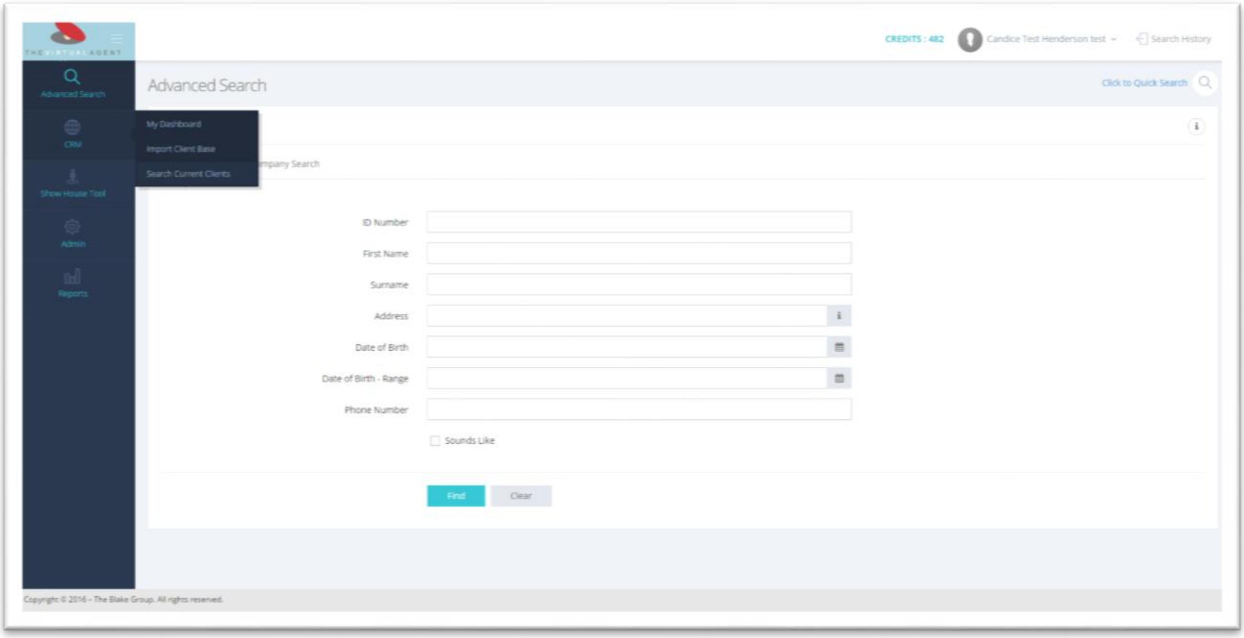


Figure 11: CRM-Search Current client's page

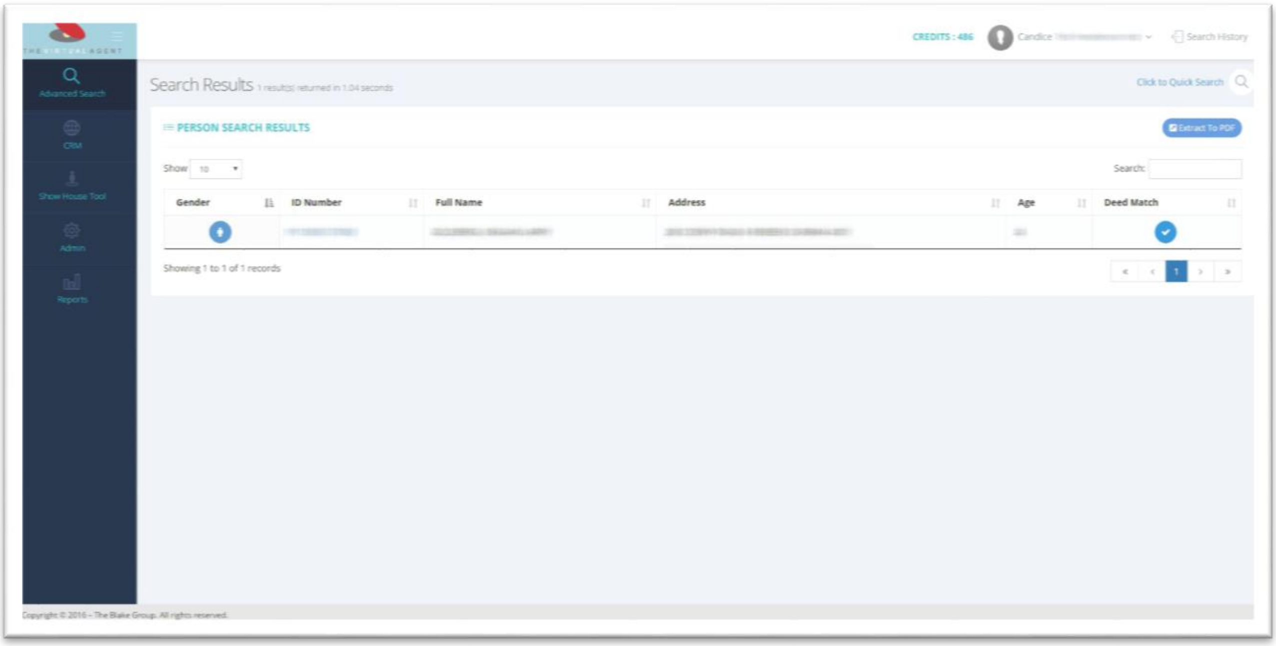


Figure 12: CRM-Client Centre results page

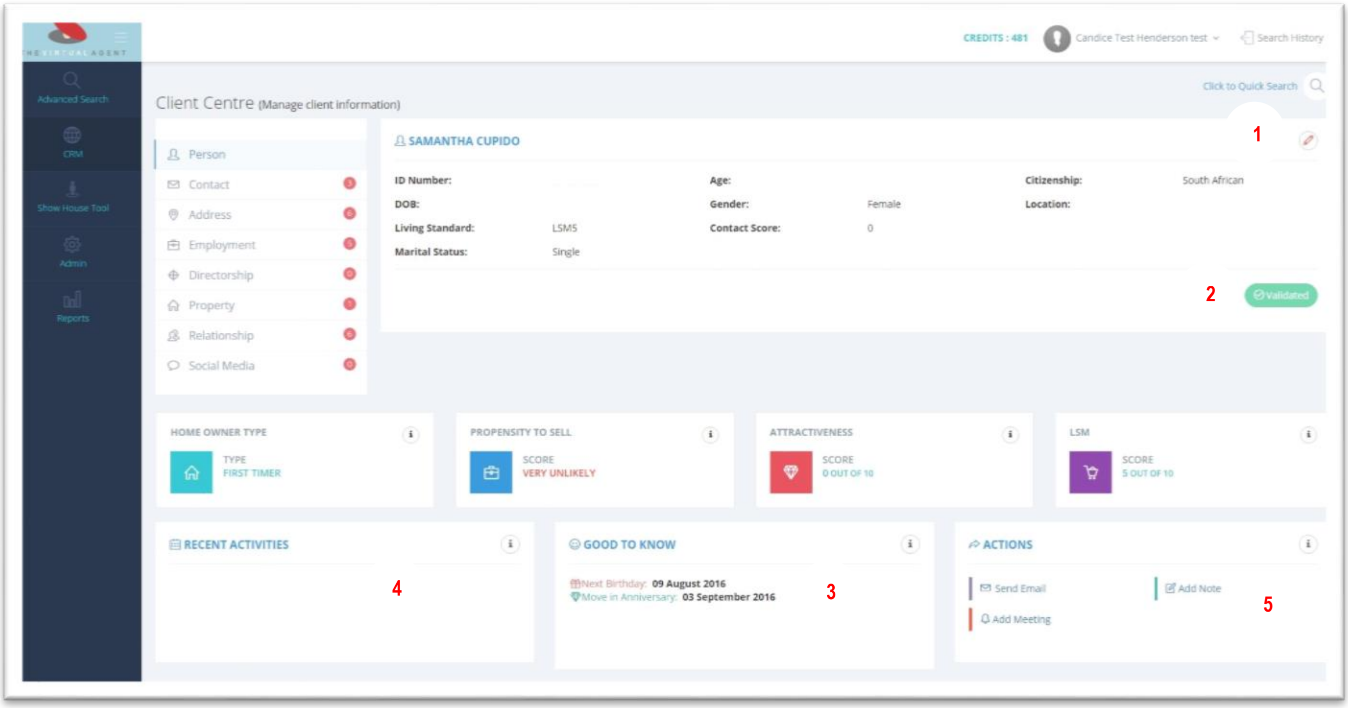


Figure 13: CRM-Client Centre results page

No.	Item	Item Description
1.	Edit information	The Edit information tool allows you to edit a client's biological details
2.	Validate	The 'Validate Client' tab allows you to validate the individuals data against TVA's database
3.	Good to know	Your clients Birthday can automatically be viewed in this section as well as any added special events you may have added such as property anniversary etc.
4.	Recent Activities	View your most recent notes & comments
5.	Actions	Use our nifty feature to send an email, add a note and schedule a meeting in real time

9. Show House Tool

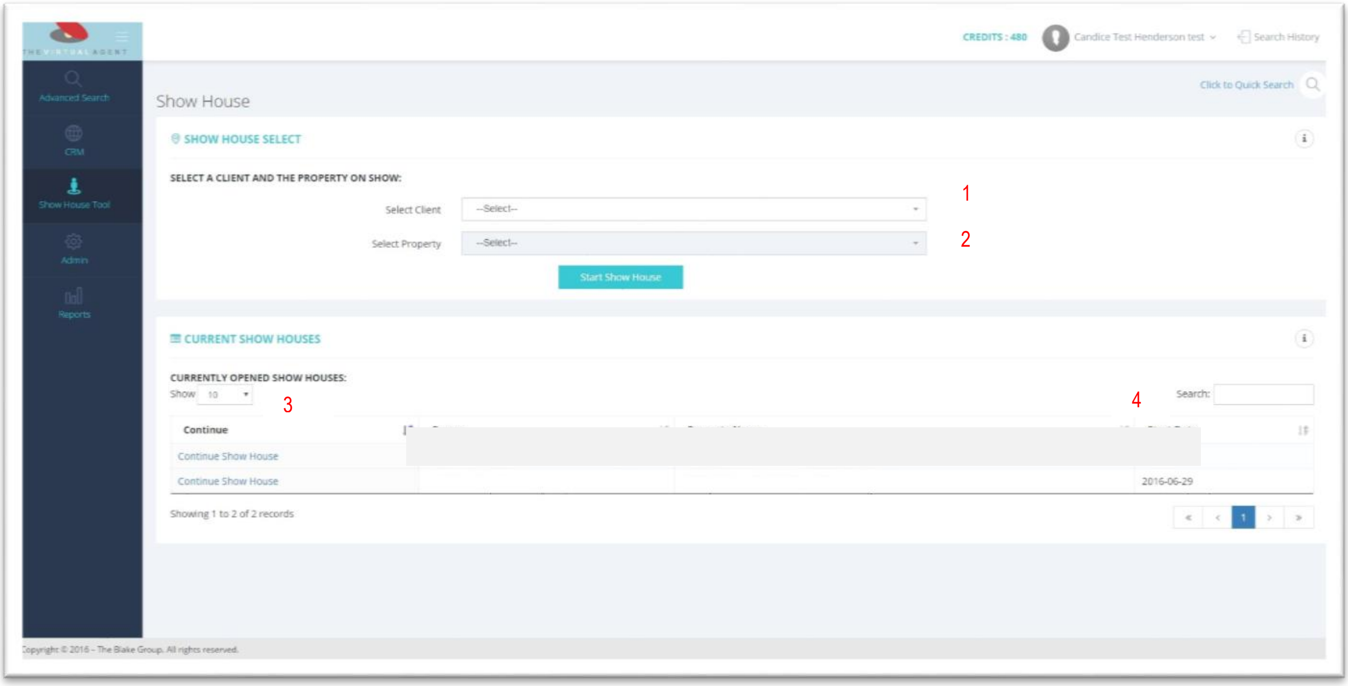
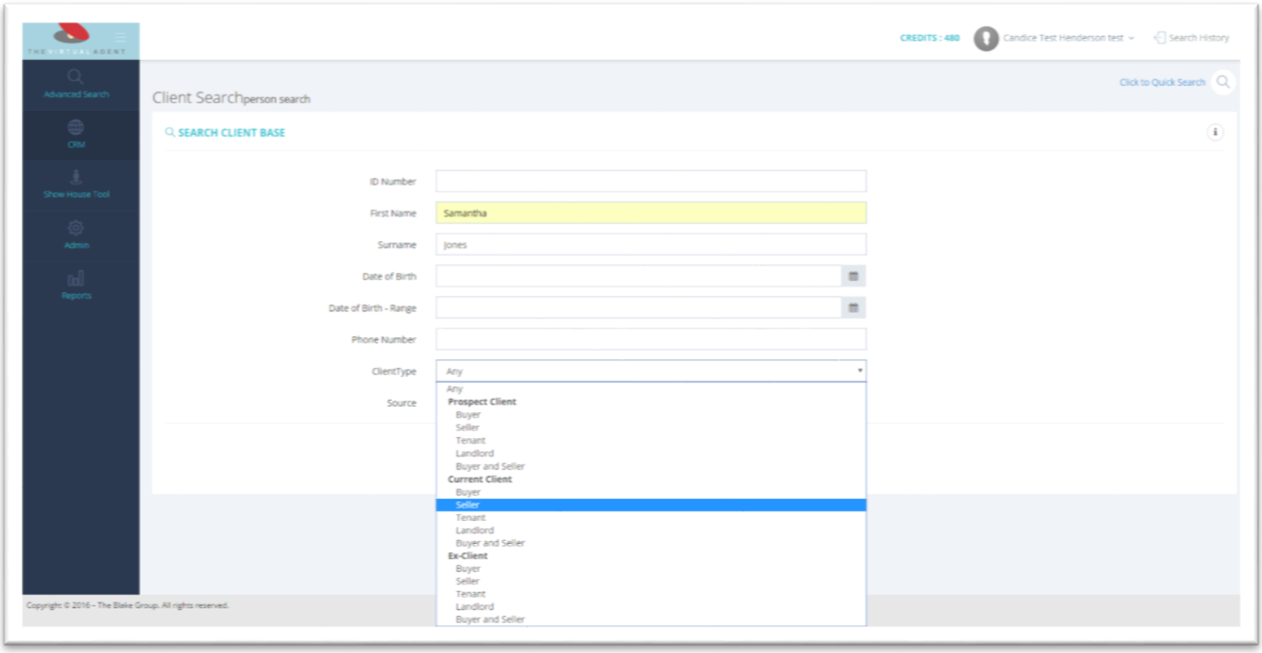


Figure 14: Show House Tool Home page

No.	Item	Item Description
1.	Select Client	The select client drop down allows you to select the client who's property you are showing
2.	Select Property	The select property drop down allows you to select the property you are showing
3.	Show Entries	This feature allows you to select the number of results that you want to see on one page.
4.	Search	This nifty little tool allow you to quickly search within your search results for a more specific detail. You can filter a result set on any word or value by typing this word or value into the filter text box. This means that only results containing this word or value in one of the fields will be displayed. (I.E. you could search for parts of a name or surname or ID number etc.)

9.1 Saving a client as a Buyer/Seller/ Tenant



No.	Item	Item Description
1.	Search Current Client	Type in the details of the client you would like to view in your CRM
2.	Client Type	Click on the drop down and choose what type of client the individual is.