

User Guide

Lexis[®] AgentIQ



Powered by
Lexis[®] WinDeed

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Getting Access

AgentIQ is powered by WinDeed, South Africa's leading search tool for individual, company, and property information.

In order to subscribe to AgentIQ, you need an active WinDeed account.



Once you have a WinDeed account, you're ready to activate your AgentIQ subscription.

To do this, you need to:

1. Be the Primary User of your WinDeed account. Only the WinDeed Primary User may activate a AgentIQ subscription.
2. Open your web browser and visit <http://www.agentiq.co.za>.
3. Click the **Subscribe** link in the top-right corner.
4. Click the **Use my existing WinDeed Account to Subscribe** button.

Note: If you don't have a WinDeed account, click the **Open a WinDeed** Account button to create one.

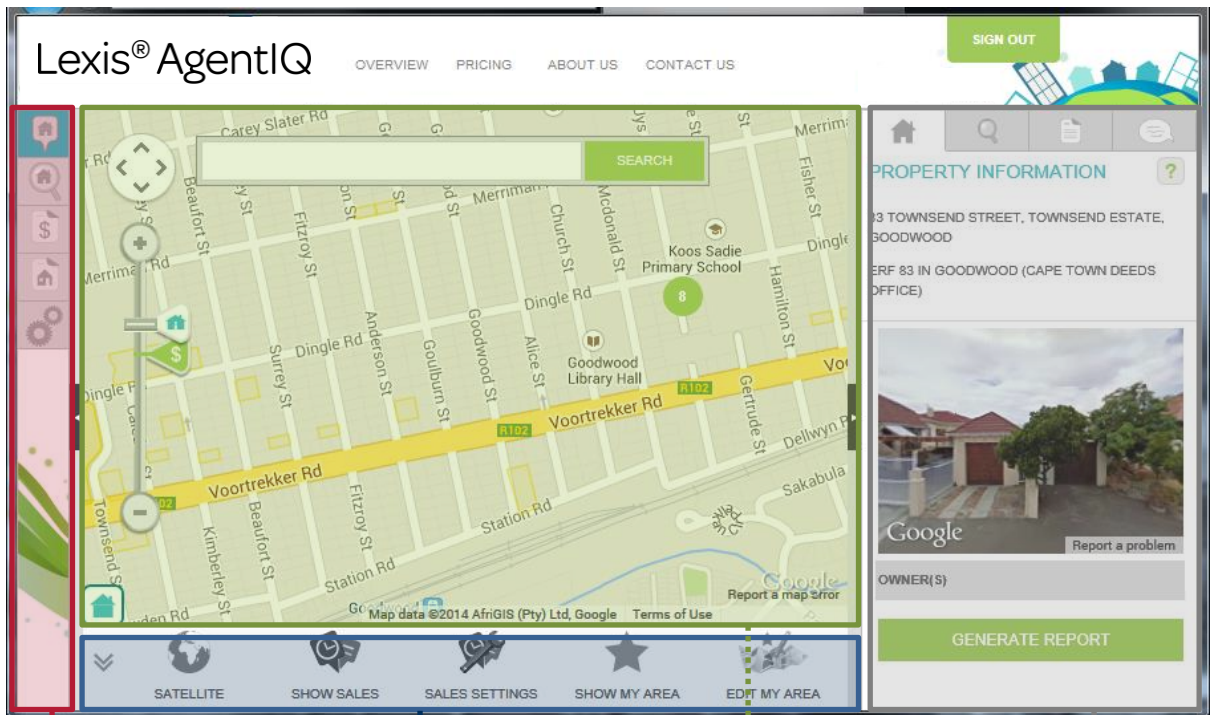
5. Enter the email address and password registered with WinDeed in the appropriate text boxes.
6. Click the **Verify** button. The account details supplied will be validated with WinDeed. If your WinDeed account is valid and is not yet subscribed to AgentIQ, you will be given details about the subscription and the applicable costs.
7. Click the **Subscribe** button.
8. Read the AgentIQ Terms and Conditions.
9. Select both checkboxes to confirm that you have read and accepted the Terms and Conditions and that you are aware of the relevant subscription charges.
10. Click the **Submit** button to finalise the subscription.

Once your subscription has been activated, we strongly recommend that you do the following:

- **Set up your Area of Interest** — Setting up your Area of Interest gives you access to additional value-added information on properties and sales.
[Learn more about Area of Interest](#)
- **Enable additional users linked to your Primary User account** — As the Primary User, you can enable additional users, allowing them to login using their own AgentIQ user accounts.
- **Set up your report branding and website theme** — Brand your reports and customise the website to reflect your company's corporate image.

Navigating AgentIQ

The AgentIQ website user interface (UI) comprises the following areas:








West Panel

South Panel

Main Panel

East Panel

West Panel

-  **Map View** — Switches to the interactive map search interface
-  **Property Search** — Switches to the street information and official property description search interface
-  **Sales Report** — Generates comparative sales reports within your Area of Interest. You must have set up an Area of Interest to use this feature
-  **Report History** — View previously generated Property Reports and WinDeed Reports
-  **Admin** — Access profile preferences, user permissions, report branding, and theme management

South Panel



Satellite/Map — Switches between the satellite and map views



Show Sales — Switches on sales markers on the map to indicate recent sales, transfers, pending registrations, and listings



Show/Hide Sale Settings —Shows or hides the Comparative Sales Settings panel, which enables you to specify a date range and select the property types for the Transfers, Pending Registrations, and For Sale markers on the map



Show Sales – Toggles scheme boundaries on and off



Show My Area —Shows the outline of your selected Area of Interest on the map



Edit My Area —Enables you to specify or update your Area of Interest

Main Panel

Displays either the interactive map, property search form, sales report form or administrative tools, depending on the search method selected in the West Panel

East Panel



Property Information —Provides information about the selected property



WinDeed Searches —Provides quick access to additional searches that can be performed for the selected property



Reports Generated —Displays a list of all the reports and searches that have been performed for the selected property



Personal Notes —Enables you to capture notes or reminders for the selected property

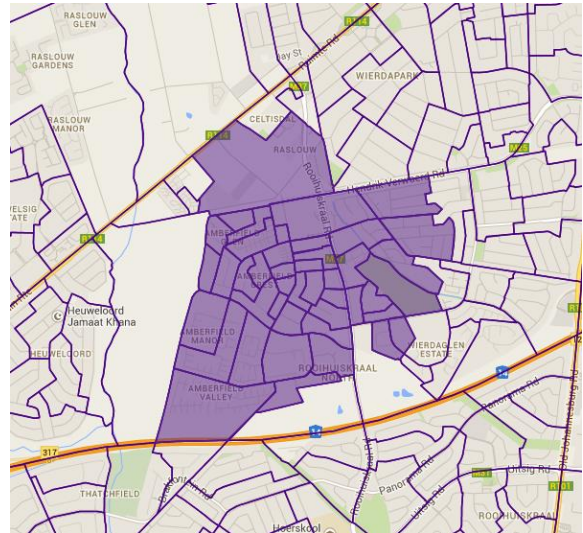
Area of Interest

Overview

An Area of Interest represents your catchment or farming area, which can include up to a maximum of 20 000 properties.

We recommend that you define your Area of Interest the first time you access AgentIQ. Doing this will ensure that you have access to:

- Relevant comparative sales properties. Only comparative sales within your Area of Interest will be included in Property Reports.
- Sales Reports
- Last registration details when selecting a property from the map or property list



Setting up your Area of Interest

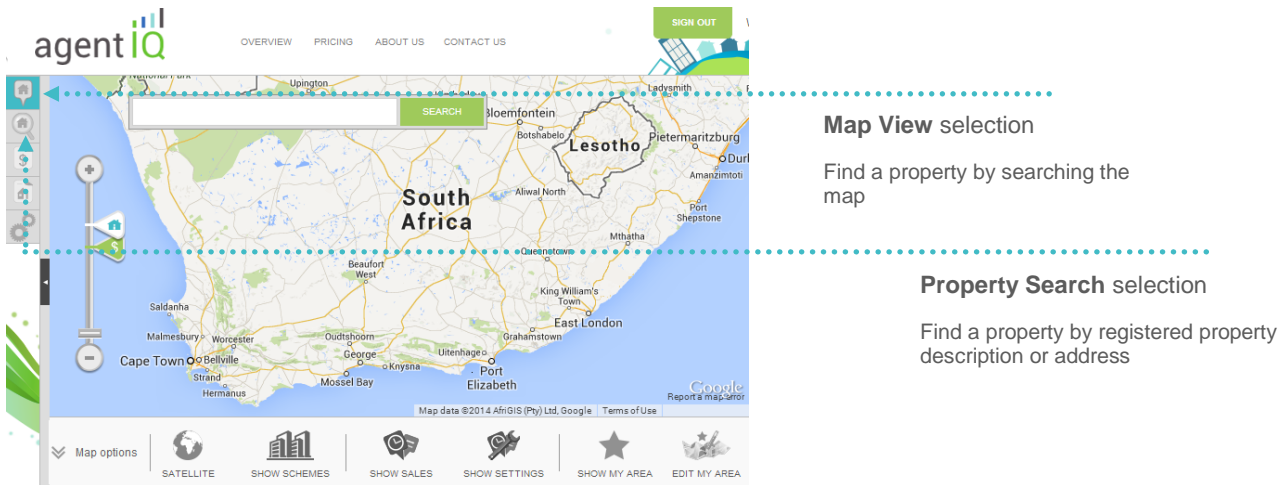
1. To set up your Area of Interest, you need to click the **Edit My Area** button in the South Panel.
2. Use the Zoom slider or double-click the map until the purple area outlines become visible.

Note: Keep in mind that you will only be able to set a personal Area of Interest within your organisation's overall Area of interest. Only the Primary User of the account can set to organisation's Area of Interest.

3. Select the outlined areas that cover your Area of Interest. You can do this by clicking the individual outlined areas, or you can use the **Multi Selector** tool, located in the **South Panel**, to highlight multiple areas at once.
4. Click the **Save Changes** button to save your selected Area of Interest.
5. Click the **Close Area** button.

Finding Properties

AgentIQ offers two searching options: **Map Search** and **Property Search**.



Map Search

The Map Search provides an interactive map that enables you to locate properties by scrolling and zooming down to street level, or by searching using the property's street address. To find a property using the Map Search, you need to:

1. Ensure that **Map View** is selected in the West Panel.
2. Use the Zoom slider to focus on a specific area, or double-click the map until you reach the required zoom level.



Scheme boundaries are highlighted in yellow which makes them easier to locate. Ensure that the Show Schemes map tool in the South Panel is enabled.

Alternatively, type the property's street address in the search box and click **Search**.



If you can't find your property using the Map Search, try searching using the Property Search. Only properties that can be spatially located will be searchable and selectable via the Map Search

3. Click in the bounds of the property you want to view. The East Panel will open to show details about the property. The level of detail shown will depend on whether the property is located within your Area of Interest.

Official Property Description and Address Search

The **Property Search** enables you to search for properties using a combination of street address information and official Deeds Office property information. To find a property using the **Property Search**, you need to:

1. Ensure that **Property Search** is selected in the West Panel.
2. Type your search criteria in the appropriate text boxes.



You don't have to complete all the fields. You can complete any combination of the fields provided.

3. Click the **Next** button to view a list of properties matching your search criteria.
4. Select the correct property in the list. The East Panel will open to show details about the property. The level of detail shown will depend on whether the property is located within your Area of Interest.

Can't find what you are looking for?

Can't find the property you're looking for? Use the Find it for you feature, and let us find the property for you!

To use the Find it for you feature:

- In **Map Search**, select on the area of the map for which we have no information and click the link at the bottom of the East Panel.
- In **Property Search**, click the link above the list of search results after performing the search.

In the **Find it for you** window, provide the requested information and click the Submit button.



Property Found, Now What?

View Property Information

Once you've located and selected the property, the following information may be displayed in the **Property Information** section of the East Panel:

- Street address and official Deeds Office description
- Street view image – select to enlarge
- Owner information
- Registration details, including registered size, date, and bond state indicator — only for properties within your Area of Interest
- Property configuration information, such as the number of rooms, bathrooms, and parking bays can be supplied — only for properties in your Area of Interest

Generate a Property Report

Click the **Generate Report** button at the bottom of the **Property Information** section in the East Panel to generate a full Property Report. [View an example of the Property Report](#)

Then click the **Confirm Selection** button to acknowledge that a unit will be deducted from your report bundle. Out-of-bundle rates will apply if your bundle has been depleted.



Limit comparative sales in the report to only the selected scheme or properties within a specified size range. Set the comparative sales criteria before you generate the report.

Store and Maintain Property Configuration Information

On the **Property Information** tab of the East Panel, click the **View All** button in the **Property Configuration** section. This will open the **Additional Property Information** window which enables you to maintain the property information, address information, and configuration and features details.

Once you've made the changes, click the **Save** button to save the changes and close the **Additional Property Information** window

🏠
🔍
📄
💬

PROPERTY INFORMATION

68 MARYSTOW LANE, CORNWALL HILL, CENTURION

ERF 1 IN IRENE EXT15 (PRETORIA DEEDS OFFICE)

OWNER(S)

J DOE

REGISTRATION DETAILS

Registered size	987m ²
Registered sales date	2013/03/02
Registration date	2013/06/25
Registered sales price (R)	1 600 000
Current bonds	YES

SALES (12 months)

	DATE	PRICE (R)
	2016/06/25	1 600 000

PROPERTY CONFIGURATION

1 ▾

Bedrooms

VIEW ALL

Select... ▾

Bathrooms

2 ▾

Garages

YES ▾

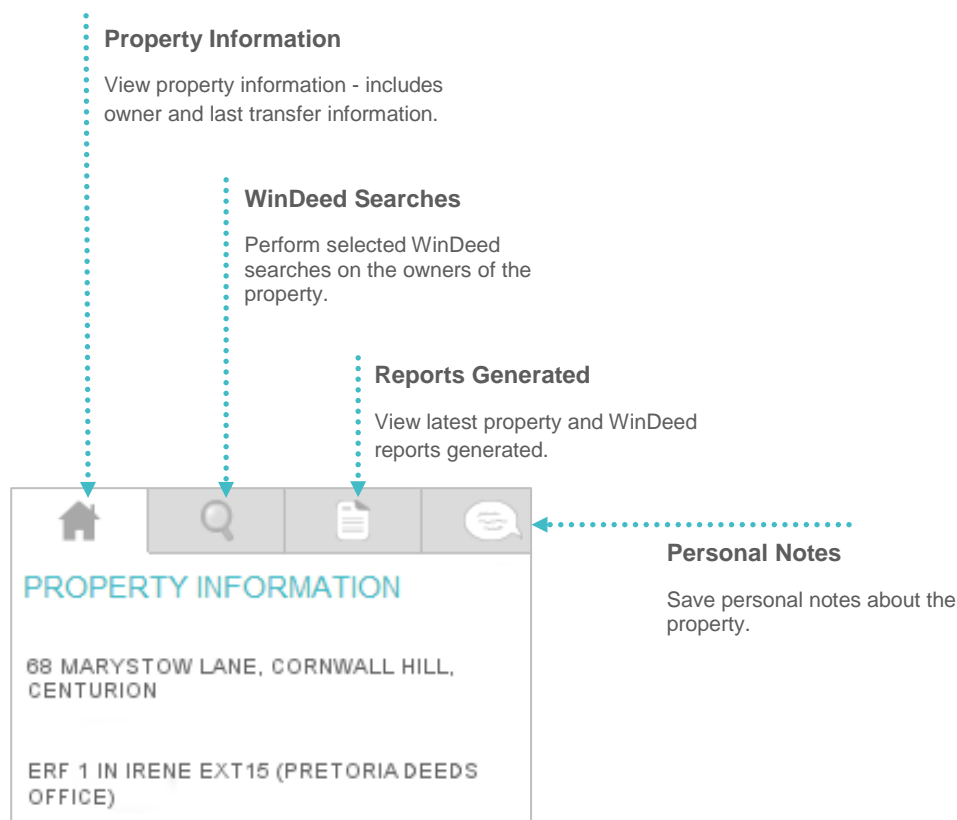
Garden

Report comparative sales criteria:

Limit properties to size range

GENERATE REPORT

Other functionality that can be accessed from the East Panel when a property is selected includes selected WinDeed Searches, accessing previous reports generated on the selected property, and the ability to add personal notes against the property.



Perform WinDeed Searches

Click the **WinDeed Searches** button in the East Panel to access the available WinDeed searches for the selected property. Then click on one of the owner names to initiate a search.

Note: WinDeed searches are not included in your bundle. WinDeed search rates apply and will be charged to your WinDeed account.

AgentIQ currently offers Deeds Office Person and Contact Information searches. Visit the WinDeed website to learn more about other searches offered by WinDeed.

View Reports Generated for this Property

Click the **Reports Generated** button in the East Panel to view a list of all the reports that have been requested for the selected property. You can click the links in this section to recall any of the reports that were previously requested.



All reports previously generated will be accessible from the Reports section of the website. This section will only display the latest report generated on the property or any of the owners for each search offered.

Make Personal Notes about the Property

Click the **Personal Notes** tab in the East Panel to capture any notes for the selected property. To make a note: type the note in the text box, and then click the **Save** button.



All notes are personal, and can only be viewed by the user account that created it.

Accessing Sales Information for Your Area of Interest

Overview

AgentIQ conveniently displays detailed comparative sales information on the interactive map. This comparative sales information includes:

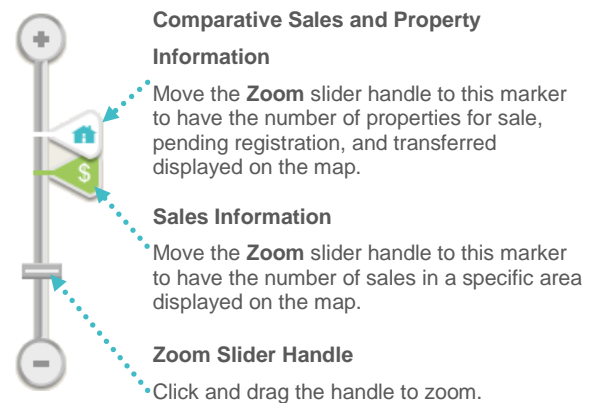
- Properties for sale – clustered
- Properties pending registration — **only** for your Area of Interest
- Properties transferred — **only** for your Area of Interest

Viewing Comparative Sales Information




To access this information, you need to zoom in on the map to the appropriate level. The Zoom slider includes two markers that show when the comparative sales information becomes visible on the map.

The following image shows the Zoom slider markers, and describes the type of information they reveal when selected. To have the information displayed on the map, you need to do the following:

1. Ensure that the **Show Sales** button is activated in the South Panel and that the appropriate sales types are set to **show on map** on the **Comparative Sales Settings** panel.
2. Ensure that you are at the appropriate zoom level.



When you reach the correct zoom level, the comparative sales information will be indicated with the following icons:

- 
Properties for Sale — This icon indicates properties for sale in a specific area. The number inside the icon indicates the number of properties for sale. Click the icon to view a list of properties, indicating price, number of bedrooms and bathrooms, listing date, erf size and click a property to see the listing.
- 
Transfer — This icon indicates that a transfer has taken place for a specific property. Move the mouse cursor over this icon to view the amount the property sold for, and the date the transfer took place. Click the icon to open the East Panel to learn more about the property.
- 
Pending Registration — This icon indicates that a property has been sold but has not yet been registered. Move the mouse cursor over this icon to view the amount the property sold for, and the date the sale took place. Click the icon to open the East Panel to learn more about the property.

Configuring Comparative Sales Information Settings

You can configure the comparative sales information settings to display only the information you want to view. Click the **Show Settings** button in the South Panel to open the **Comparative Sales Settings** in the East Panel.

The following graphic shows the **Comparative Sales Settings**:

COMPARATIVE SALES SETTINGS

Adjust dates, property types and selected settings as required:

Link comparative sales sliders

TRANSFERS Show on Map

36 24 12 1 3

PENDING Show on Map

36 24 12 1 3

FOR SALE Show on Map

36 24 12 1 8

INCLUDE PROPERTY TYPES:

Erven Agricultural Holding

Sectional Farms

[Set as my default settings](#)

[Clear my settings](#)

Link Comparative Sales Sliders

Select this checkbox if you want the Transfers, Pending, and For Sale sliders move simultaneously (i.e. to apply the same period to all three).

Show on Map

Select/deselect the checkboxes to show\hide the Transfers, Pending, and For Sale icons on the map.

Comparative Sales Sliders

Adjust the sliders to specify a date range for the transfers, pending registrations, and properties for sale you want displayed on the map.

Property Types

Select/deselect the Property Types checkboxes to include/exclude transfers, pending registrations, and properties for sale for those property types.

Set As My Default Settings

Sets the current Comparative Sales Settings as your default.

Clear My Settings

Resets the Comparative Sales Settings.

Note: The information shown does not represent a snapshot in time. For example, only properties listed for sale and that are still listed for sale will be shown. The same applies to properties pending registration.

Reporting

AgentIQ offers two reports that are included in your monthly subscription: **Property Reports** and **Sales Reports**.

Property Report

The Property Report provides a comprehensive view of the property and its features, as well as the surrounding area. The Property Report provides the following information when available:

- Street address and official Deeds Office description
- Municipal valuation figures
- On-site valuation figures (as supplied)
- Owner information
- Transfer history
- Property configuration and features (as supplied)
- Sales information for the surrounding area
- Bonds and other documents
- Monthly and yearly suburb trends, showing average price and total volume of sales in the suburb
- Amenities in the surrounding area

If you generate a Property Report for a property inside your Area of Interest, the comparative sales information section will only include other properties that are in your Area of Interest. This makes the comparative sales information more relevant.

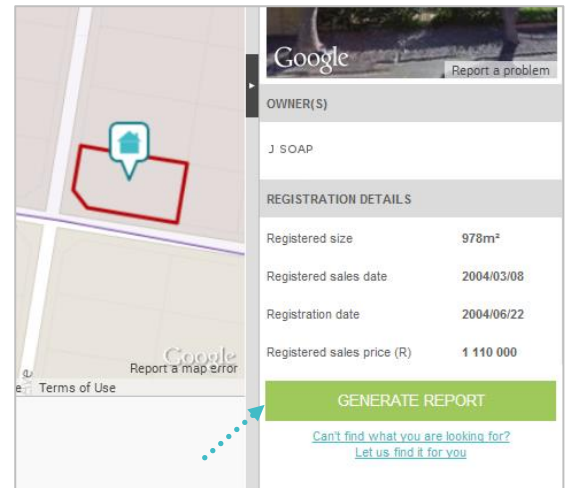
If you generate a Property Report for a property that is not in your Area of Interest, the comparative sales section will include properties that are within a specific radius surrounding the property. This radius could span multiple suburbs, possibly resulting in an inaccurate sales comparison.

[View an example of the Property Report](#)

Generating a Property Report

To generate a Property Report, you need to do the following:

1. Locate the property you're looking for and select it to open the.
2. Click the **Generate Report** button on the **Property Information** tab on the East Panel.



Saving the Report as a PDF Document

To save the report as a PDF document, click the **PDF Version** button located on the property report.

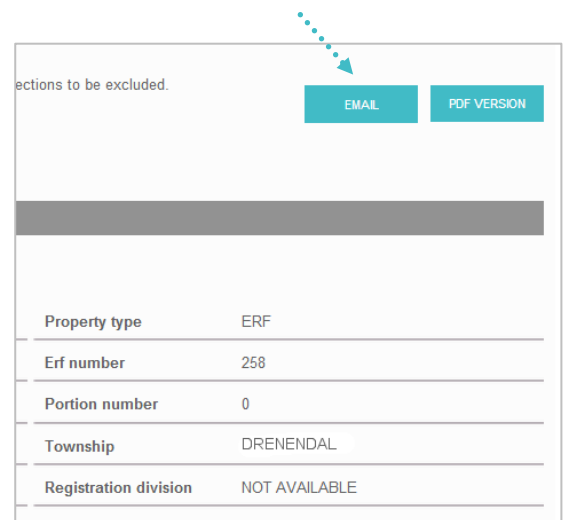
If you have supplied branding for your reports, it will be shown on the PDF version.

[Learn more about report branding](#)

Exporting the Property Report

To send the report via email:

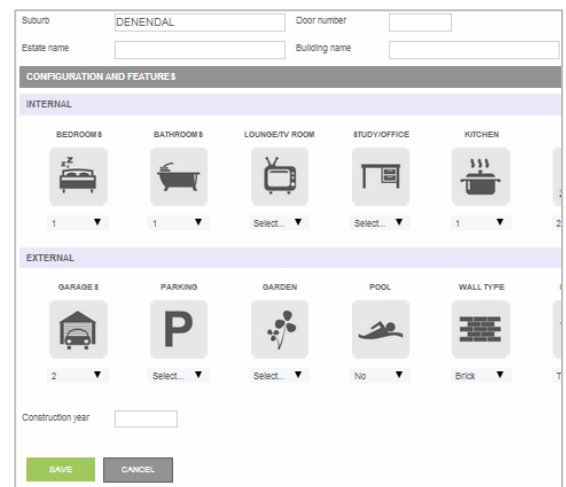
1. Click the **Email** button.
2. Type the recipient's email address in the text box.
3. Click the **Send Email** button.
4. The report will be sent in PDF format.



Editing the Report Information

You can edit the information that is included in the Property Report. To edit the information:

1. Click the **Edit...** button in the relevant section to open the editing screen.
2. Make the required changes and click the **Save** button to save the changes and close the editing screen.



Any changes made from the report to the property details will be saved against your account. The next time you generate a report on the property or select it from the map, it will include the updated information.

Sales Report

The Sales Report provides comprehensive comparative sales information for your Area of Interest. Filter criteria can be applied to limit the report to specific sales type, property type, date range and size.

Sale type options:

- Properties for sales
- Properties pending registration
- Properties that have been transferred



The date range supplied will filter properties for sale by sale date, properties pending registration by date of sale and transferred properties by sales date.

Sales information is limited to active properties for sale listed, active sales pending registration and properties transferred within the last 3 years.

Note: The report may exclude several addresses for properties for sale in the area. This is because the estate agent who has listed the property has asked for the address to be withheld and we honor that request.

Generating a Sales Report

To generate a Sales Report, you need to do the following:

1. Click the **Sales Report** button in the West Panel.
2. Specify which sales you want to include in the report, including the property type, a date range, price range, and portion/unit size.
3. Click the **Generate Report** button.

Exporting the Sales Report

The Sales Report can be exported in CSV and PDF document format. To do this, click the appropriate link located in the top-right corner of the report.

Excluding Information from the Sales Report

You can choose to exclude certain properties from the **Transfers**, **Pending Registration**, and **For Sale** sections when exporting the report. To exclude properties, simply deselect the checkboxes next to their street addresses in the list.

Exclude from report

Uncheck to exclude record from the exported version.

Export options

Export data to CSV or PDF.

SALES REPORT
Comparative sales information within your Area of Interest.

REFINE REPORT

Display Sales by sales type Export to [CSV](#) [PDF](#)

TRANSFERS
No transfers available for the specified criteria.

PENDING REGISTRATION

Address	Suburb	Type	Official Description (Deeds Office)	Erf-SS	Erf-Unit m ²	Date	Price (R)	R/m ²
<input checked="" type="checkbox"/> 1 MARYSTOWE LANE	CORNWALL HILL	ERF	IRENE EXT 10 (PRT)	788	882	2014/03/27	2 550 000	2 891
<input checked="" type="checkbox"/> 11 BEALE NOOK STREET	HIGHVELD	ERF	HIGHVELD EXT 7 (PRT)	1716/5	354	2014/03/26	2 500 000	7 062
<input checked="" type="checkbox"/> 45 BREYTEN STREET	ROOIHUISKRAAL NOR	ERF	ROOIHUISKRAAL NOORD EXT 1 (P	324	1 071	2014/03/25	1 650 000	1 540
<input checked="" type="checkbox"/> 1 WALDORF DRIVE	CENTURION GOLF ES	ERF	HIGHVELD EXT 7 (PRT)	1368/1	528	2014/03/22	3 700 000	7 007
<input checked="" type="checkbox"/> -	-	ERF	ROOIHUISKRAAL NOORD EXT 24 (F	3801	502	2014/03/19	1 600 000	3 187
<input checked="" type="checkbox"/> 2 MAFIKENG AVENUE	WIERDAPARK	ERF	WIERDA PARK EXT 2 (PRT)	2044	1 285	2014/03/19	1 545 000	1 202
<input checked="" type="checkbox"/> 7085 BERKHEYA CRESCENT	AMBERFIELD MANOR	ERF	ROOIHUISKRAAL NOORD EXT 23 (F	3512	957	2014/03/18	600 000	628
<input checked="" type="checkbox"/> 16 SQUIRES CRESCENT	HEATHEFIELD	ERF	CAPE TOWN (CPT)	142331	254	2014/03/15	1 170 000	4 608
100 properties included:							Lowest priced property	560 000
							Average price	2 267 240
							Highest priced property	18 020 000

Accessing Previously Generated Reports

AgentIQ keeps a record of all the generated reports (excluding Sales Report) which can be recalled at any time, at no cost. To view your previously generated reports, click the **Report History** button in the West Panel.

To access a report, simply select it from the list.

Keep in mind that you can also access previously generated reports for a specific property by selecting it on the map or property list, and then selecting the **Reports Generated** tab in the East Panel.

AgentIQ Administration Features

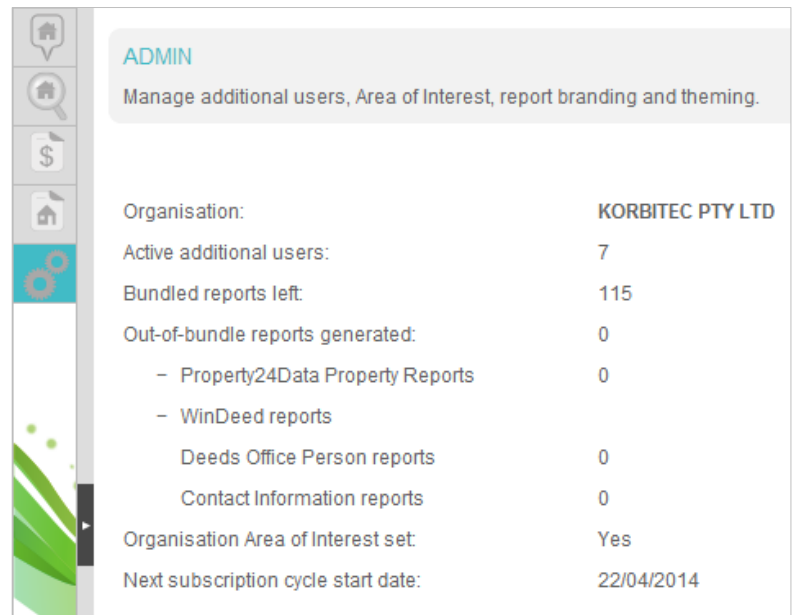
The **Admin** interface provides an overview of your AgentIQ account. You can access the AgentIQ administration features by clicking the **Admin** button in the West Panel.

Note: Some administrative functions are only available to the Primary User on the WinDeed account.

Account Overview

The Overview section is available to all active users. This section provides the following information:

- Number of active additional users
- Bundled reports remaining
- Number of out-of-bundle reports generated
- Whether an Area of Interest has been set for the organisation
- Subscription renewal date



ADMIN	
Manage additional users, Area of Interest, report branding and theming.	
Organisation:	KORBITEC PTY LTD
Active additional users:	7
Bundled reports left:	115
Out-of-bundle reports generated:	0
- Property24Data Property Reports	0
- WinDeed reports	
Deeds Office Person reports	0
Contact Information reports	0
Organisation Area of Interest set:	Yes
Next subscription cycle start date:	22/04/2014

Administration Features

The administration features include:

- Managing your User Profile
- Managing Additional Users
- Setting the organisation's or your Area of Interest
- Branding reports
- Website branding and theming

Managing your User Profile

You can view your profile preferences and set your preferred map view by clicking the **My Profile** tile. The map view options include:

- **South Africa** — The map will be zoomed out to show the whole country
- **IP location** — The map will focus on the location of your internet service provided (only when this information can be accessed).
- **Area of Interest** — The map will be zoomed in to focus on your selected Area of Interest

We recommend that you set your default map view to Area of Interest.

Managing Additional Users

As the Primary User, you can manage all Additional User profiles. To manage Additional User accounts, click the **Manage Additional Users** tile.

You can do the following for each Additional User:

- Enable/disable Additional User profiles

Note: Disabling an Additional User's profile will only disable their access to AgentIQ; it will not disable the user on your WinDeed account. However, disabling an Additional User's WinDeed account will automatically disable their profile on AgentIQ.

- Grant/revoke Additional User permissions:
 - Set own Area of Interest
 - Configure individual report branding
 - Configure individual site branding and theming
 - Generate reports in and out of bundle
 - View own reports
 - View reports on an organisational level
 - Perform WinDeed searches from within AgentIQ

To force report branding for a specific user, deselect the **Report Branding** checkbox next to their name.

To force website branding for a specific user, deselect the **Site Branding** checkbox next to their name.

USERS										
Status	User Email	Set Own Area of Interest	Report Branding	Site Branding	Generate Reports In bundle	Generate Reports Out-of-Bundle	View Own Reports	View All Reports	WinDeed Reports	
All		All	All	All	All	All	All	All	All	All
	smitha@agentiq.co.za	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Disable
	andrewp@agentiq.co.za	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Disable
	jonest@agentiq.co.za	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Disable
	parkerk@agentiq.co.za	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Disable
	maxj@agentiq.co.za	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Disable
	smiths@agentiq.co.za	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> Disable
	carpentert@agentiq.co.za	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Disable
	cambellr@agentiq.co.za	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Enable

Setting the Area of Interest

The Area of Interest can be set on an organisational and user level. Only a Primary User can set the organisation's Area of Interest, and this must be done before an Additional User can set a user-level Area of Interest. An Additional User's Area of Interest is limited to the boundaries of the organisation's Area of Interest.

To set the organisational-level Area of Interest, you need to do the following:

1. Click the **Area of Interest** tile.
2. Use the Zoom slider or double-click the map until the purple area outlines become visible.
3. Select the outlined areas that cover your organisation's Area of Interest. You can do this by clicking the individual outlined areas, or you can use the **Multi Selector** tool, located in the South Panel, to highlight multiple areas.
4. Click the **Save Changes** button to save your selected Area of Interest.
5. Click the **Close Area** button.

[Learn more about setting the user-level Area of Interest](#)

Note: You will only be able to select areas located within your organisation's Area of Interest.

Branding Reports

You can customise the appearance of your AgentIQ reports by adding a custom header and footer. To add your header and footer images, you need to do the following:

1. Click the **Report Branding Manager** tile.
2. Click the **Change Header** button to browse for and select the header graphic.
3. Click the **Change Footer** button to browse for and select the footer graphic.

For the best results, we recommend an image width of 720 pixels (19.05cm) and height of 168 pixels (4.45cm).

Note: Your changes will not apply where the Additional User has permissions to apply their own branding and has done so already. [Learn more about forcing report branding](#)

Website Branding and Theming

You can customise the appearance of the AgentIQ website to match your organisations corporate image by selecting one of the predefined themes, and adding your organisation's logo.

To customise the website's appearance, you need to do the following:

1. Click the **Website Theme Manager** tile.
2. Click the **Change Theme** button.
3. Select the theme that best matches your organisation's image in the drop-down list.
4. Click the **Save Theme** button.
5. Click the **Change Logo** button to browse for and select the image you want to use as your organisation's logo.

For the best results, the logo should be a maximum of 200 pixels (5.29cm) wide by 75 pixels (1.98cm) high.

Note: Your changes will not apply where the Additional User has permissions to apply their own theme and has done so already. [Learn more about forcing website branding](#)

Viewing your Transaction History

You can view a detailed transaction history for all the searches performed on the account. The transaction history includes all searches that were performed in and out of your search bundle. It also indicates the cost incurred for out-of-bundle and the user that performed the search.

To view the transaction history, click the **Transaction History** tile.