



**The UK's most
comprehensive
valuation panel**



VAS Dashboard

User Guide



We're here to add *value* to valuations.



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www.vas-group.co.uk
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High Force Road,
Riverside Park,
Middlesbrough, TS2 1RH

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1. Introduction

- You will receive an email '**VAS Panel Invitation to Dashboard**'
- Click on '**accept invitation**' and then set your own unique password. Password requirements are as follows:
 - 8 characters minimum
 - must include at least one uppercase
 - one lowercase
 - one number
 - one special character
- Once you have set a password, you can then bookmark the link to your favourites.
 - **SAVE THIS LINK >>>** <https://manager.vas-panel.com>

(Please note: the Dashboard has been designed to work with Google's **Chrome** or Mozilla **Firefox** browsers – please use one of these browsers to access the Dashboard otherwise it will not load properly)

- On the log-in page, please enter your email address and the password that you have created in the previous steps above.
- **N.B.** If you would like a new user to receive an invitation to use the VAS Panel Dashboard, then please let us know by emailing the persons full name, role within the business and their email address to VASProgress@vas-group.co.uk



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2. Dashboard Home/Valuations Page

Once you've logged in successfully, you will see a page that looks like this:

The Oracle Valuations 01642 26 22 17 @ info@vas-group.co.uk Search

Valuations

+ New Quote Request

All My Valuations

Search or Filter results All Last Updated: newest

VP#43584 SHORT FORM	14 Allerston Way, Guisborough, TS14 6GA (Big Time Charlies) Lender Test Lender	Fee Reported	created about 1 month ago updated 17 minutes ago
VP#43623 SHORT FORM	81 Berkley Drive, Guisborough, TS14 7LU (Big Time Charlies) Lender Test Lender	Fee Reported	created 11 days ago updated 38 minutes ago
VP#43627 SHORT FORM	9 Westgate, Guisborough, TS14 6BG (Test Company Name) Access Booked 1st Sep 2022 Report Due 5th Sep 2022 Lender Test Lender	Fee Reported	created 8 days ago updated about 4 hours ago
VP#43602 SHORT FORM	Royalty Farm, Boston, PE22 BLD (Monstors Inc) Lender Test Lender	Fee Reported	created 17 days ago updated about 5 hours ago
VP#43552 RED BOOK	Costa Coffee, Guisborough, TS146BG (Big Houses) Lender Test Lender Broker Test Broker	Quote Accepted (unpaid)	created 4 months ago updated about 6 hours ago

1 2 3 4 5 ... Next » Last »

The VAS Dashboard Home/Valuations page. (Please note, this screenshot was taken from our test environment.)



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3. Request a Valuation Quote

Let's start by covering how to create a Valuation Quote. Please send your quote requests by clicking on the following button at the top-right of the VAS Dashboard valuation page.



You will be prompted to choose the type of property or report you are requesting, single property valuation, portfolio, desktop, drive by, homebuyers etc.

All of the information we request is required by the valuer to help them fully assess the asset. This will speed up the process of determining whether the valuation can be placed on fee scale or if a quotation is required.

Valuation Report Type

Please select the type of property / purpose of the report.

The screenshot shows a form titled "1 Valuation Type". It contains a dropdown menu labeled "Requested report type". The dropdown is open, showing a list of options: "-- Please Select --", "Full valuation - Single property / Land", "Full valuation - Multi-property / Portfolio", "Desktop valuation", "Drive-by valuation", "Re-address of VAS Panel report", "Re-address of a non-VAS Panel report", "Re-inspection of property", "Project monitoring / Building survey", "Home buyers report", and "Other".

The different options for the types of report are depicted in the screenshot above. For the purposes of this quick guide, we'll cover **Full Valuation – Single property / Land** in more detail.



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With this option selected for the Requested Report Type, there are five property sectors to choose from in the next section/ dropdown.

1 Valuation Type

Requested report type
Full valuation - Single property / Land

Requested property sector
-- Please Select --
Residential
Commercial properties / Land (WITH NO planning permission)
Developments / Land or buildings (WITH planning permission)
Agricultural
Specialist (e.g. trading properties, care homes, leisure, bars, restaurants, hotels etc.)

If you choose the '**Residential**' option as the property sector, you then have the following options as shown in the screenshot below. Please select what kind of residential property you would like to be valued:

1 Valuation Type

Requested report type
Full valuation - Single property / Land

Requested property sector
Residential

Requested property type
-- Please Select --
Single house (inc. semi, detached, terrace)
Single flat
Small HMO (less than 5)
Large HMO (5-10)
Large HMO (11+)

Once you pick a property type, click the 'Next' button and you will be directed to a unique form that will allow VAS to capture all the property information required.



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If you choose the '**Commercial**' option in the Property sector field, there are six options in the property type category to choose from (this is specifically for buildings or land with NO planning permission):

1 Valuation Type

Requested report type
Full valuation - Single property / Land

Requested property sector
Commercial properties / Land (WITH NO planning permission)

Requested property type
-- Please Select --
-- Please Select --
Industrial
Office
Retail
Semi commercial (1-2 units)
Semi commercial (3+ units)
Land (without planning permission)

For a **Full Valuation – Multi-property / Portfolio** option, you just need to select a property sector from the options below:

1 Valuation Type

Requested report type ⓘ
Full valuation - Multi-property / Portfolio

Requested property sector ⓘ
-- Please Select --
-- Please Select --
Residential
Commercial
Mixed Use
Other

Then click the 'Next' button and you will be directed to a unique form that will allow VAS to capture all the property information required.

The easiest way to share information on portfolios to be valued is to upload an excel spreadsheet as an attachment under the '**Additional Information**' section and you



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should include the following information: full property addresses with postcodes; descriptions of each property; details on any tenants / annual rents; and estimated values.

Instant Instructions - Additional Information

If the instruction is to be based on a **fee scale** and **you do not require VAS to report quotations**, please state this in the '**Additional Information**' box along with uploading your instruction letter (if this is not already hardcoded to our systems) and any relevant information.

e.g., "Please proceed on fee scale £1074 inc VAT – Please contact Joe Bloggs on 07123 456 789, or email me at joe@bloggs.com"

Please also use this section to provide any further information, some examples are provided onscreen to assist you, as below:

Additional information

If you would like this to be an instant instruction based off our fee scale, please advise accordingly below.

B I U [text formatting icons] [undo/redo icons]

Please provide any additional details / documents you think necessary that will assist the valuer including:

- Any special requirements, additional bases of valuation, special assumptions that need to be made.
- Details of the property condition.
- Report required urgently by a certain date for property purchase / auction purchase etc.
- If development - provide planning details etc.
- Provide sales details / brochure if applicable.

Please remember to provide as much detail on the property as possible. We will send the quotes back to yourselves via email and they will also be saved to your Dashboard.

A unique VP# will be generated and visible to you once we review your New Quote Request from you via the Dashboard. You can view the valuer's we select to provide quotes and view the fees on your dashboard as and when we receive them in real-time.



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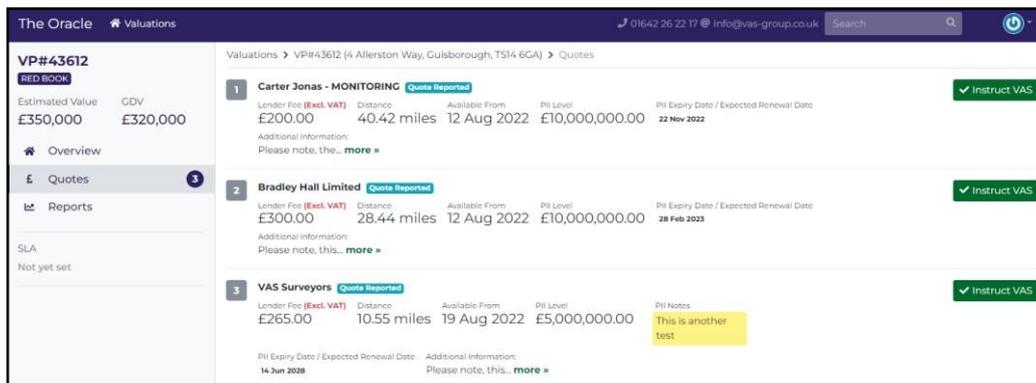
If you see a fee and availability that works and you wish to instruct, you can do so at any point during this process, before the fees are officially reported to you by way of an email. Please do this by leaving a note on your dashboard, with the chosen firm, and who to contact for payment and access.

It is crucial that we are made aware of any Urgent, time sensitive instructions so that we can check with the surveyors if this can be accommodated in their diaries. Ideally this information should be provided at quotation stage, However, if you are only aware from instruction stage, please let us know and our team will advise if this can be achieved



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- Click on Quotes (you can see this VP has 3 quotes reported) and you'll see a page that looks like this:



- Press the 'Instruct VAS' button next to your chosen quote within the 'Quotes' section on the left-hand side within the designated VP number





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- This will bring in the following panel on the right-hand side of the screen

Instruct VAS

Instruction Information

B I U [List Icons] [Refresh]

Please provide any additional information that may be relevant to this instruction.

This will enable us to ensure the valuation progresses as efficiently as possible and may help minimise delays.

Documents

If we do not have your instructions hard coded to our systems, please upload here.

Additionally, please include any supporting documents below e.g., Title Plans/ Registers/Schedule of Works/Planning documents (if applicable).

Providing required documents now will allow us to progress the valuation as quickly as possible and may help minimise delays.

Drag or upload files to this box to upload them

Payee Details

Applicant Lender Broker

Applicant

Company
Big Time Charlies

Name
Joe Bloggs

Telephone
[Empty Field]

Email
test@test.com

Access details

Please confirm the details of who the Valuation practice will need to contact in order to organise the property inspection for this instruction.

Providing as many contact details as possible will allow us to progress the valuation as quickly as possible and may help minimise delays.

Access Name
[Empty Field]

Access Number
[Empty Field]

Access Email
[Empty Field]

Instruct Valuation



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- Please read all help text
- You can free type in the **Instruction information** box any additional commentary we may need to be aware of.
- You can also attach your instruction letter (if not already hardcoded into our systems) **(and any supporting documents)** under the **'Documents'** section. Click the link to upload (or you can drag and drop documents)
- There are also fields for you to complete in the **Applicant /Access contact** details.
- Once everything has been provided, click the **'Instruct Valuation'** button:

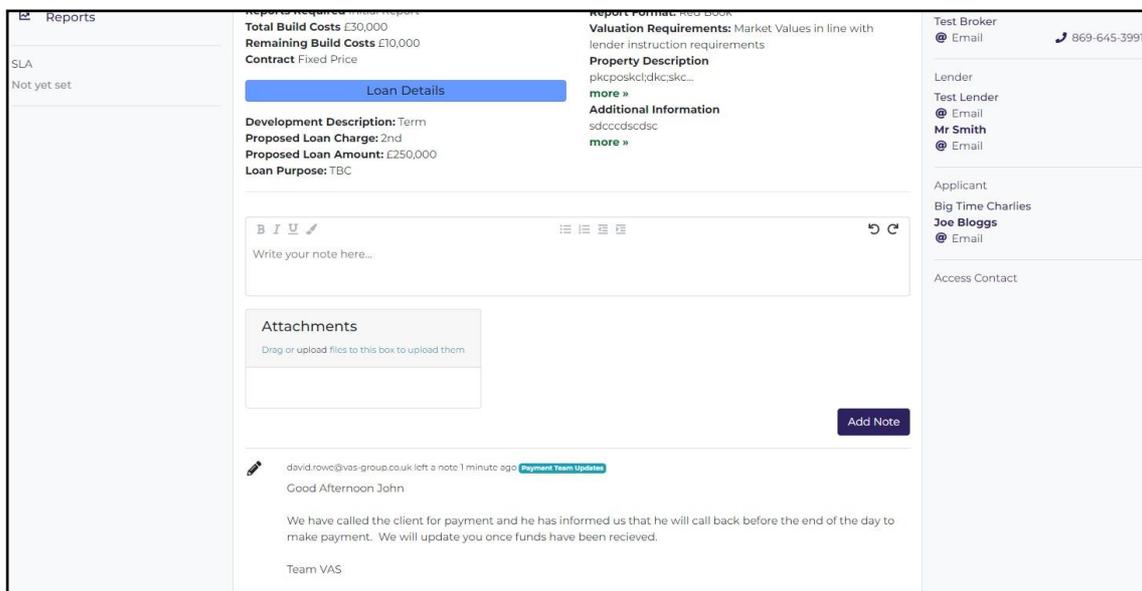
Our dedicated Service department will now proceed accordingly with the instruction.



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5. Guide to Internal Notes on VP# Cases

- You can view any notes left on the case from Team VAS. You will find these on the VP Overview page, towards the bottom of the centre section of the screen:



- Team VAS will also categorise notes so you can see clearly what stage the note is in reference too.
 1. Access Issue
 2. PVQ From Lender/ Broker
 3. PVQ Valuer Response
 4. Report Items
 5. Payment Team Updates
 6. On Hold / Cancellation Comments
 7. Valuer waiting for Information
 8. General
 9. Re-Inspection Fees
- You can also add notes and/or upload documents on any case on the VAS Dashboard and Team VAS will receive an alert. For example:



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A screenshot of a note creation interface. At the top, there is a toolbar with icons for bold (B), italic (I), underline (U), and a pencil icon. To the right of the toolbar are icons for list, link, and unlink. In the top right corner, there are refresh and save icons. The main text area contains the following text: "Hi Team VAS,", "Thank you for the update", and "Regards, John". Below the text area is an "Attachments" section with a light blue border and the text "Drag or upload files to this box to upload them". At the bottom right of the interface is a dark blue button labeled "Add Note".

- The individual VP# case keeps an audit trail of all notes that have been added - from either Team VAS or yourself, that you will be able to refer to at any time.

A screenshot showing a list of notes. The first note is from user ':vasdev+lender@ososhi' left a note 2 minutes ago. The text of the note is: "Hi Team VAS,", "Thank you for the update", and "Regards, John". The second note is from user 'david.rowe@vas-group.co.uk' left a note 10 minutes ago, with a blue tag labeled "Payment Team Updates". The text of the note is: "Good Afternoon John", "We have called the client for payment and he has informed us that he will call back before the end of the day to make payment. We will update you once funds have been recieved.", and "Team VAS".

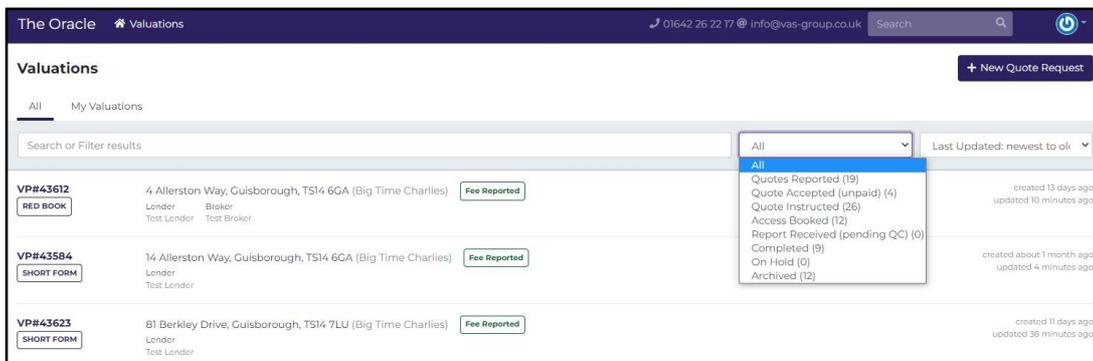
****Please ensure to check notes in each VP# case to ensure updates from Team VAS are not missed****



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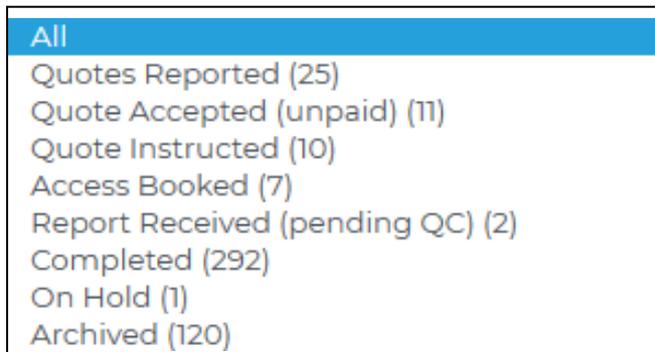
6. Dashboard Filter and Search

A key feature of the VAS Dashboard are the categories on the filter function on the right-hand side of the valuations page.



Here you can see the different statuses of the valuation lifecycle, and how many of your valuations are in each status.

Each status and what it means is described within this document:



- QUICK TIP**

Alternatively, you can search for a valuation in the search box at the top right corner of the page by using;

- VP Number
- Applicant Name/ Company name
- Address Details (Postcode Search **OR** first line of the address)
- Using search will take you directly to the VP# job that you need without having to filter through the different statuses.



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7. Statuses Explained

Quotes Reported

- This status shows all quotations that you have requested from VAS Panel.
- Once you have located the particular case:
 1. Click through by selecting the address line.
 2. Once you are in the case all quotes received can be viewed by clicking on the **Quotes tab** on the left-hand side of the screen.

The screenshot shows a sidebar on the left with a navigation menu: Overview, Quotes (selected with a '2' badge), and Reports. The main content area displays case details for VP#8764 (RED BOOK) with an estimated value of £300,000. Below this, two 'Quote Reported' entries are listed:

Quote ID	Lender Fee	Distance	Available From	PII Level
1	£1,145.00	14.75 miles	12 Mar 2019	£5,000,000
2	£895.00	4.72 miles	18 Mar 2019	£5,000,000

N.B.

- You can also view the valuer's distance from the property (as the crow flies)
- Their PII level, Expiry Date/Expected Renewal, and any PII Notes (if applicable)
- Availability at the time the quote was reported to you
- Any additional information added by Team VAS (if applicable)



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Quotes Accepted (Unpaid)

- This status shows all the VP# jobs where we have received an instruction from the Lender/ Broker to proceed with the valuation; however, they remain unpaid by the client.
- You will also notice in the Overview page of the VP case, that all details for the valuation will have been inputted into our Database e.g., applicant and access details.

N.B. We will enter **TBC in the access contact until payment is received and the access arrangements are verified by the applicant and/ or person paying for the valuation.**

QUOTE ACCEPTED (UNPAID)

Property
4 Allerston Way
Guisborough
North Yorkshire
TS14 6GA

Broker
Test Broker
@ Email 869-645-3991

Lender
Test Lender
@ Email
Mr Smith
@ Email

Applicant
Test Company
Joe Bloggs
@ Email 07712345678

Payment Details

Access Contact
Trevor Simpson
@ Email 01642 111222

N.B. The Service Team will be leaving notes for you to view at this stage



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Quote Instructed

- This status shows all the VP# jobs where we have processed instructions and issued them to the relevant valuer - pending an inspection date.
- The Job status will now change to **'Live (Payment Taken)'** and you will see that the payment details now show that the case is **'Fully Paid'**
 - **The payment is stated (all payments are exclusive of VAT)**
 - **The person who has paid for the valuation**
 - **The date and time funds were received.**

LIVE (PAYMENT TAKEN)

Property
4 Allerston Way
Guisborough
North Yorkshire
TS14 6GA

Broker
Test Broker
@ Email 869-645-3991

Lender
Test Lender
@ Email
Mr Smith
@ Email

Applicant
Test Company
Joe Bloggs
@ Email 07712345678

Payment Details **Fully Paid**
23 Aug 2022 12:14 PM £200.00
Payment Link / BACS payment by Applicant

Access Contact
Trevor Simpson
@ Email 01642 111222

N.B. The Facilities Team will be leaving notes for you to view at this stage



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Access Booked

- Once an inspection date has been confirmed you can view the inspection date (and any access notes, if provided) and the date that the Report is due back to VAS on the left-hand side of the overview page.
- Additionally, you can also see the SLA (**Service Level Agreement**) which is the amount of working days that the valuer has stated they need to issue the valuation report. (SLA information will have been sent over on the Fee Quote Received Email)
- The report due date will reflect this timescale.
- You will always receive an email from Team VAS confirming the Date of the Inspection for your records.

(Please Note: Team VAS are not always advised of the time of inspection)

SLA
5 days
Access Booked For
25th August 2022; 11am
All booked in!
Report Due
2nd September 2022

- If you see an amended badge next to the Report Due Date, this will mean that Team VAS have amended the date and there will be notes on the case to explain why.

Report Due	Amended
5th September 2022	

N.B. The Facilities Team will be leaving notes for you to view at this stage



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Report Received (Pending QC)

- This status shows all VP# jobs where the valuation report has been received from the valuer, however; it is currently going through our internal QC (Quality Control) review checks.

Completed

- This is where all VP# jobs remain once the report has been issued to you electronically.
- You can also view and download valuation reports on completed cases from the Reports section on the left-hand side by clicking on the file under Report Documents.
- Once the report is open in .pdf format, you can print or save to your local computer.

VP#43634
SHORT FORM
Estimated Value
£500,000

Overview
Quotes
Reports

Valuations > VP#43634 (Superdrug, Guisborough, TS146BG) > Reports

Report Received	Report Documents	Status
19th August 2022 16:49	VAS_PANEL_Brochure_V08_LR.pdf	19th August 2022 16:54 Passed!

- N.B.** If an amended report is requested, it will supersede previous valuation reports that have been sent/uploaded to the VAS Dashboard & the amended version will be the final version.

N.B. Again, at any time you can add notes on the case for Team VAS

On Hold

- This status shows all VP# jobs that have been placed on hold by the lender/broker and/or valuer pending further information.
- The case will remain in this status until Team VAS resume the case at your request.



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Archived

- This status shows all VP# jobs where fee reported cases have not progressed over a 30-day period and will be automatically archived for your records. (This also relates to jobs that are in unpaid)
- If Team VAS receive an update for an archived case and it becomes **live** – Team VAS will simply resurrect the case.

PVQ's (Post Valuation Queries)

- If you have a post valuation query on a completed valuation - you can upload documents and / or add your query to the notes section within the valuation case and Team VAS will action this from here.
- We will always send you the reply via email as well as saving it within the notes section for your reference

We are constantly looking at ways to improve the dashboard further, and we will update you as new features are developed and implemented. Please keep your eyes peeled for exciting updates about the future of the VAS Dashboard.