Thames Water Property Insight

Website Ordering

User Guide.

Getting Started

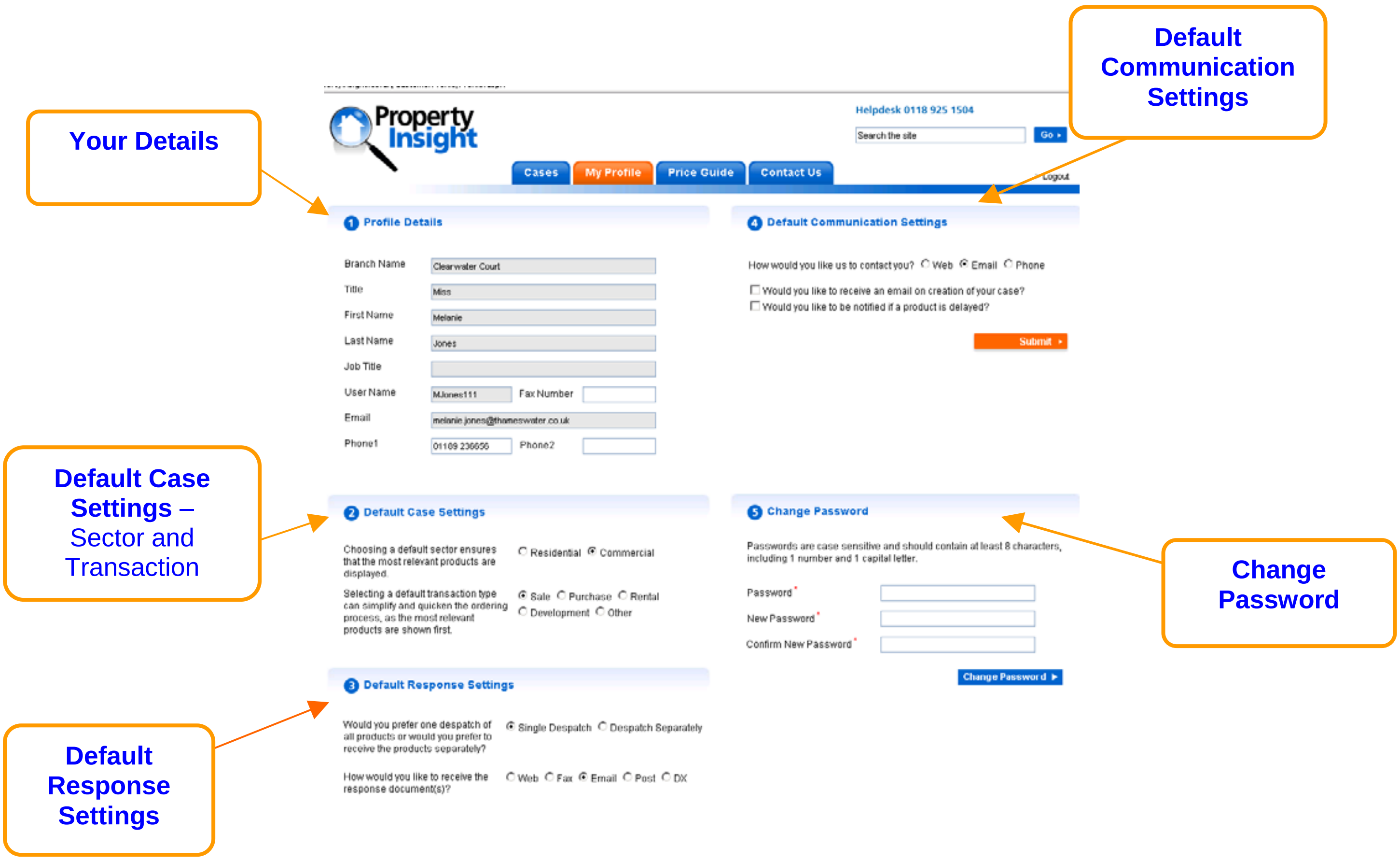
Once Registered

Each user will be provided with an individual user ID and password for the system. To log on to the site follow the instructions below:

1. Enter the following website address in full: www.propertyinsight.co.uk
2. Enter your individual user ID and password provided
3. Click 'Login' to enter the site.

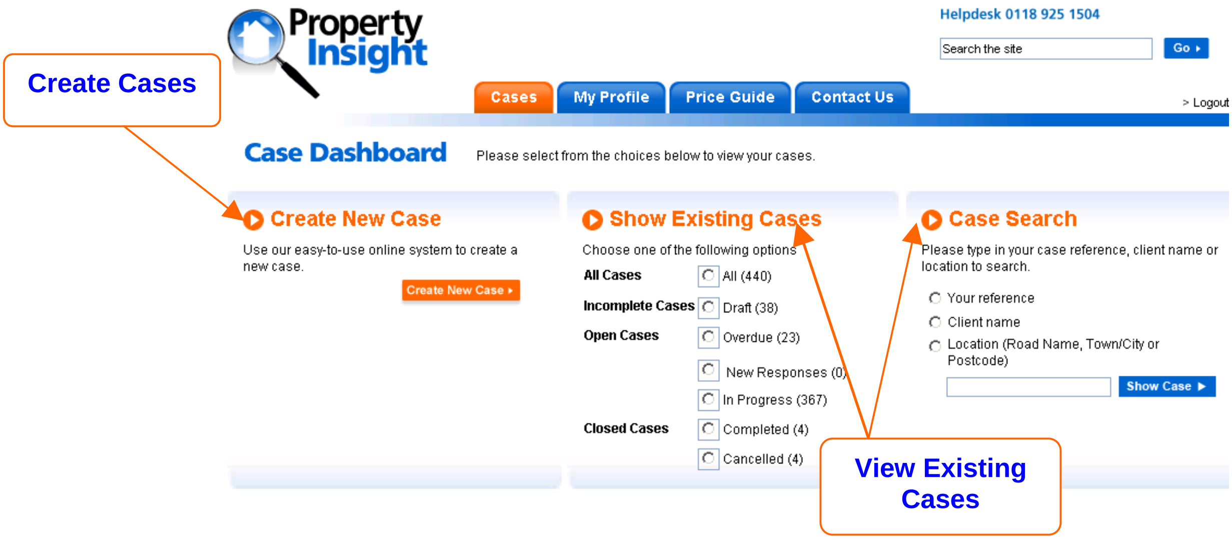
My Profile

The 'My Profile' tab is used to change your default settings and password.



Case Dashboard Screen

After logging on you will reach the **Main Menu** (**Case Dashboard**) screen.



The following functions, shown at the bottom of the screen, will follow through your journey.

Ordering Searches (Cases)

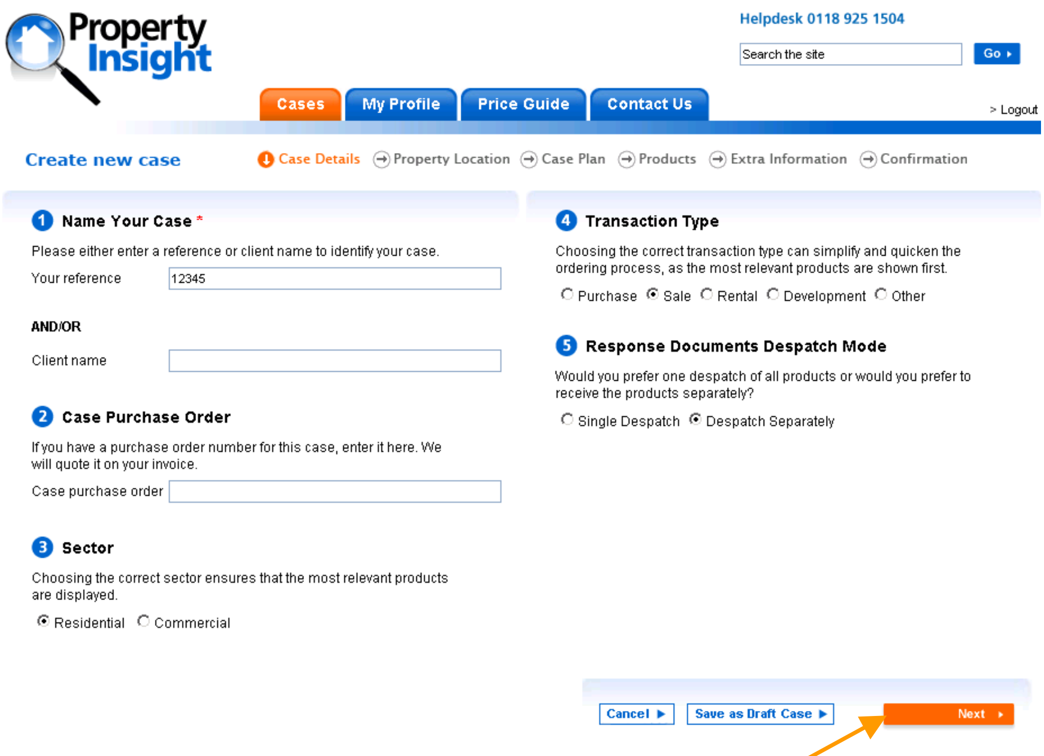
Case Details

To order searches on Property Insight's Website you will need to have the following basic information to hand:

- your file reference and/or Your client name
- property Address Details

When ready click 'Create New Case'.

The Case Details section will allow you to Name Your Case, add a Case Purchase Order Number (if required), choose Sector, choose Transaction Type and Response Documents Despatch Method.



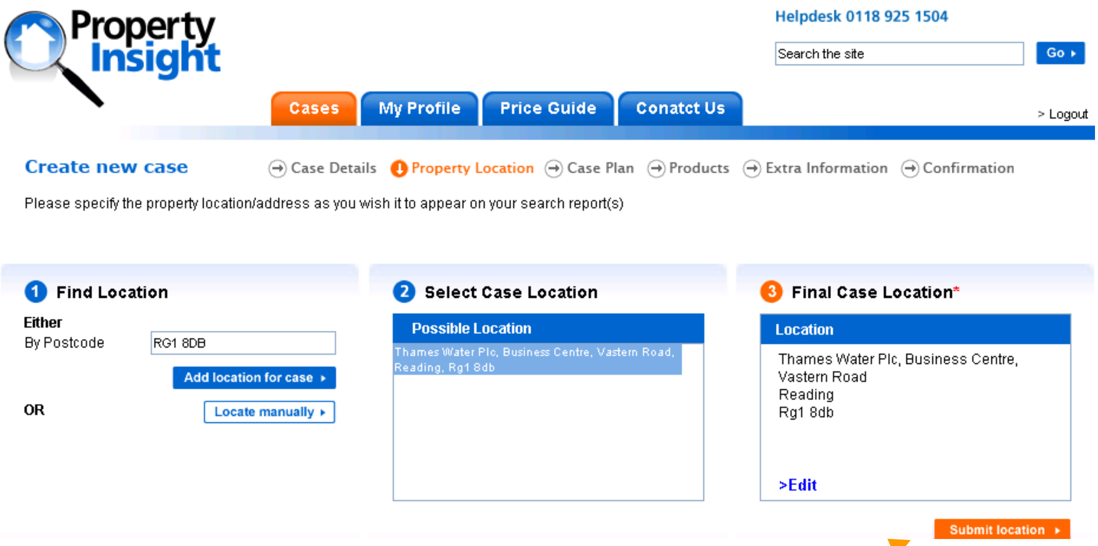
Once completed click 'Next' at the bottom of this page.

Property Location

You can locate the property by postcode or you can locate manually by using the street name, number and town.

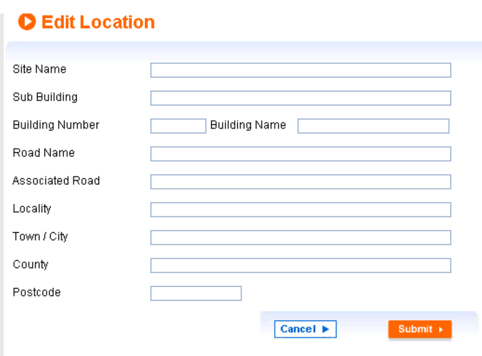
Locate by Postcode:

- **Find Location** by entering Postcode. Click 'Add Location For Case' Address will be validated and will display a list of possible addresses
- **Select Case Location** by placing curser on correct location and left click once.
- **Final Case Location** will list address identified.



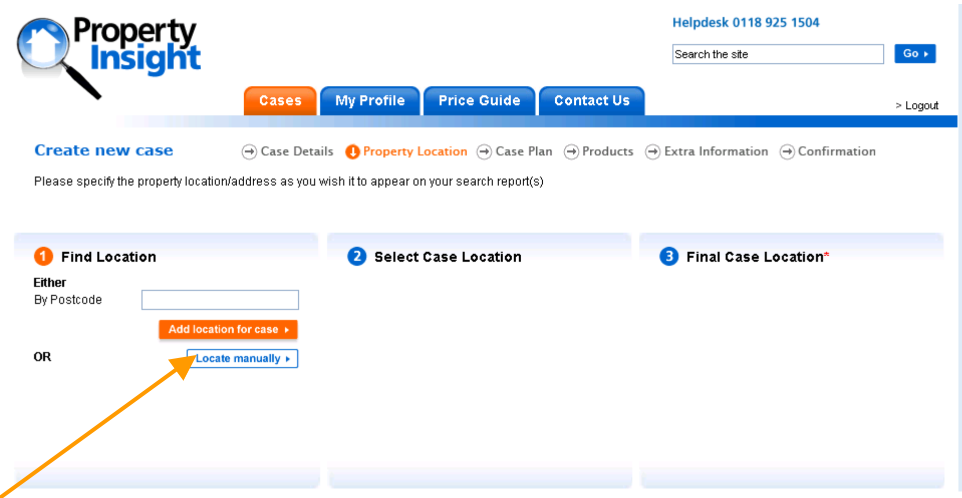
If address details are correct continue by clicking 'submit location' directing you to '**Prepare a Case Plan'** (Location Map)

Edit Address Details

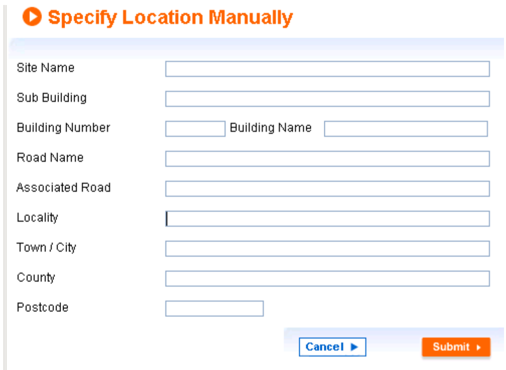


If details need amending, click 'Edit' and add/delete as appropriate in the Edit Location pop up box. Once details are entered click 'submit' and continue to **Prepare a Case Plan' (Location Map)**.

Locate Manually



Click here to locate manually.



The **Specify Location Manually** pop up box will appear. When details have been entered correctly click ‘submit’. Details will appear in **Final Case Location** if details are correct click ‘submit location’ at the bottom of the page.

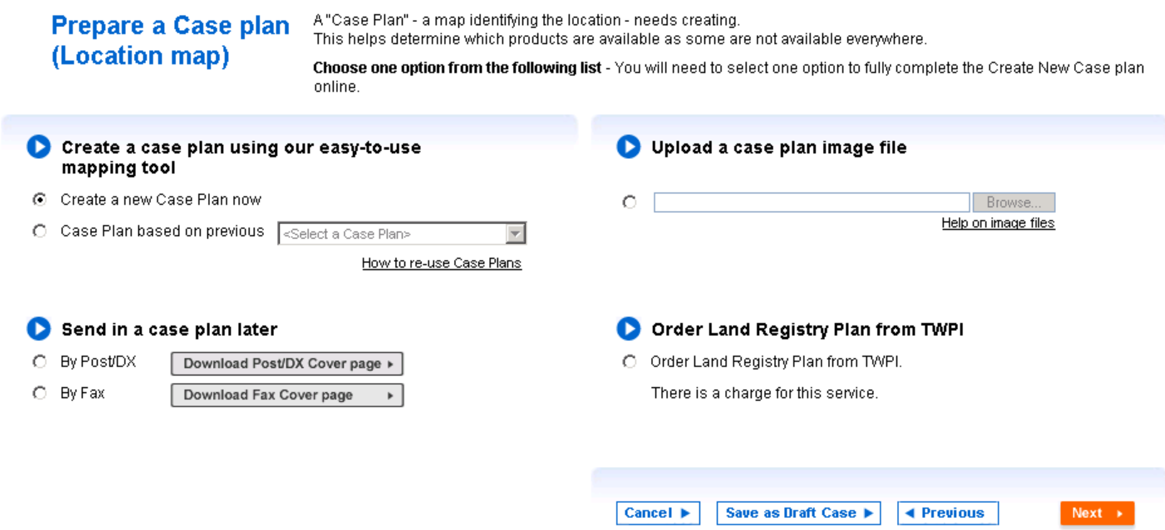
If details need amending, click ‘Edit’ and add/delete as appropriate in pop up box. Once details are entered click ‘submit’.

A case plan will need to be uploaded onto our site for properties or areas that need to be entered manually. (Instructions on how to do so are detailed on page 9).

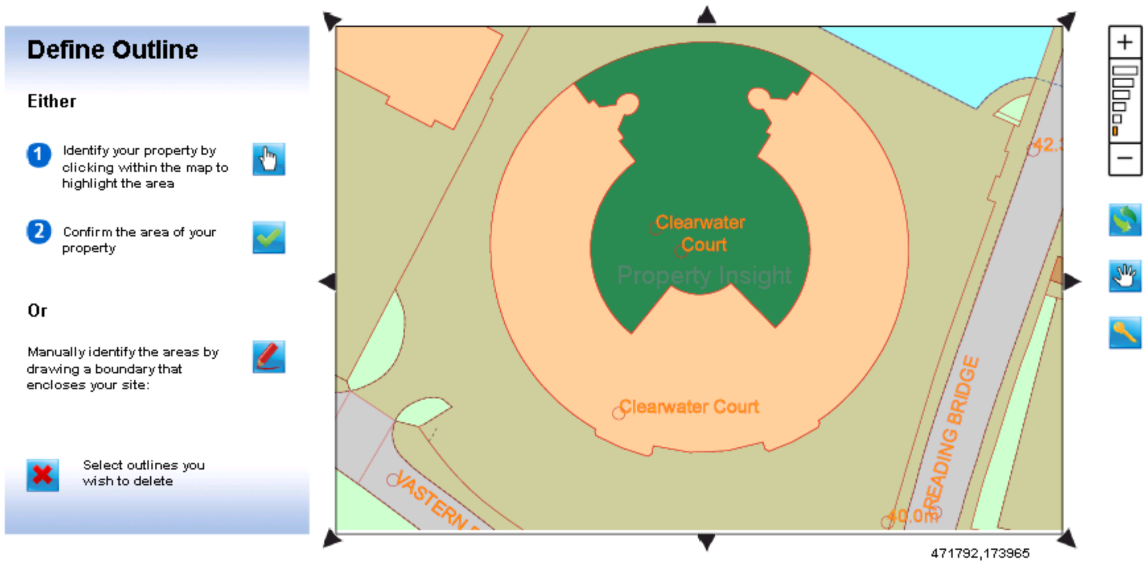
Case Plan

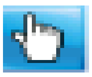
A map identifying the location of the property needs creating.

You can choose to either draw a case plan using our easy to use internet mapping tool, send a case plan later by post/DX, upload a case plan or order a land registry plan.

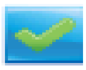


Create a Case Plan using our easy to use mapping tool



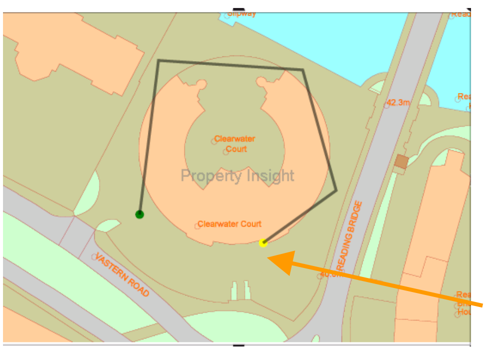


To create an automatic boundary, click on the pointer button and click within the area(s) required with the plan.



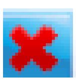
Once you are happy with boundary created, click on the confirmation button to confirm area required.

If you need to manually draw a boundary, please click on the draw button, which will allow you to create the actual shape required.



Once the draw button has been clicked, click the beginning of boundary required on the map and continue clicking in the relevant areas creating the boundary required.

The start of the manual boundary will be marked with a red dot. The end will be marked with a green dot. The boundary will be indicated as complete when the dot turns yellow before the final click should be made.



If you need to cancel the generated boundary at any point, click on the required boundary within the plan and then on the cross button.

Send a plan later

If you would like to send your plan in by Post/DX, click 'download cover page, which will direct you to the relevant cover sheet for you to print and attach to plan.

Upload a Case Plan

To upload plans onto the system, select the option Upload a Case Plan image file. Click Browse to locate the image from your computer. The plan must be in the format of PDF, JPEG, BMP, GIF, TIF, FPNG and the file size cannot exceed 10MB.
A window will open which will allow you to locate the appropriate file by double clicking on the file name.
Once this has been selected you will then return to the Upload Case Plan Section. At this stage the file can be renamed, once happy click next at the bottom of the screen.

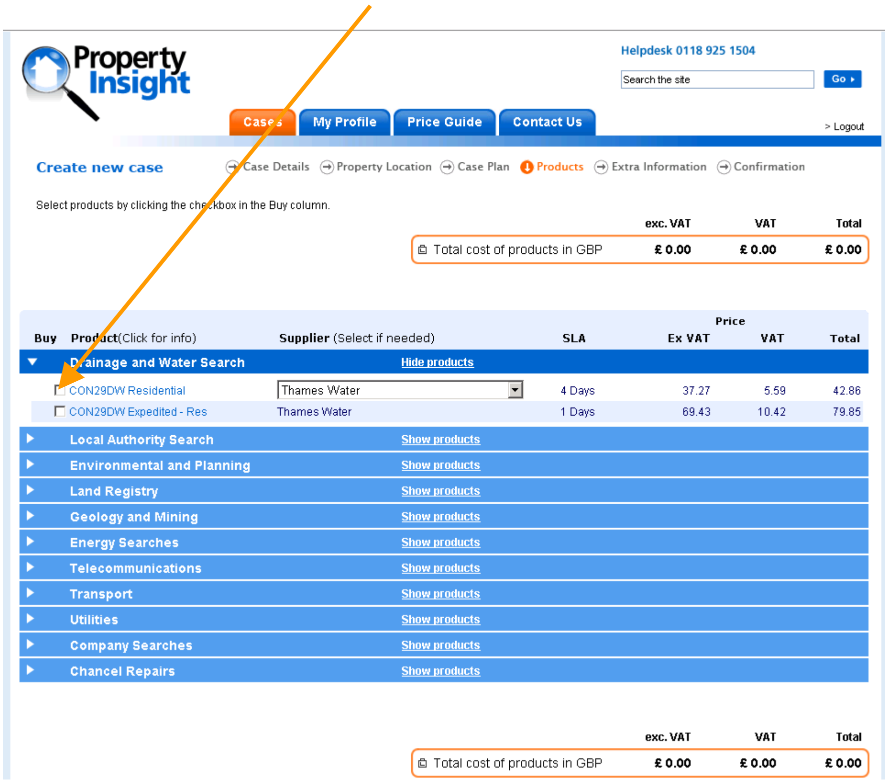
Order a Land Registry Plan from TWPI

Once this option is selected the system will automatically show a Land Registry plan within the products section.

Once you have selected your preferred case plan option, click 'next' at the bottom of the screen to progress to the next stage of ordering.

Products

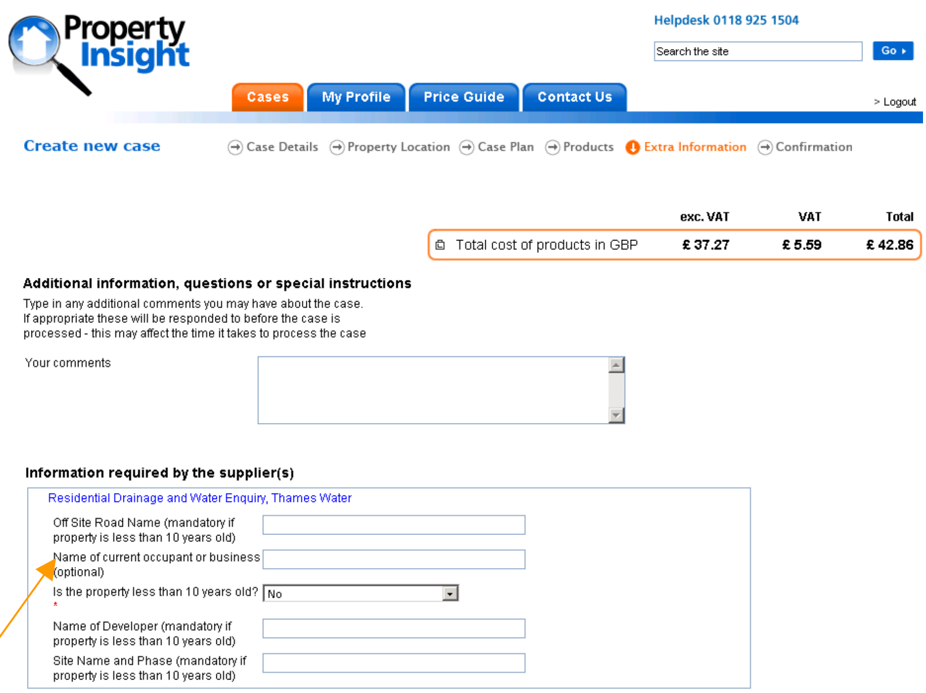
Expand the products listed by clicking on arrow to the right of the product and select required products in the tick box in the buy column.



The Total Product Cost will be displayed at the top and bottom of the screen.

Extra Information

Additional information, questions or special instructions about the case can be entered here.



Any mandatory information required by the supplier before a search is ordered will be requested on this screen.

Confirmation

The confirmation page gives an overview of case details, all searches requested, costs incurred and property location.

Case details Edit

Reference	12345	**Sector**	Residential	**Despatch option**	Consolidated	**Notify delays**	No
Case PO		**Transaction type**	Sales	**Despatch method**	RM	**Client name**	

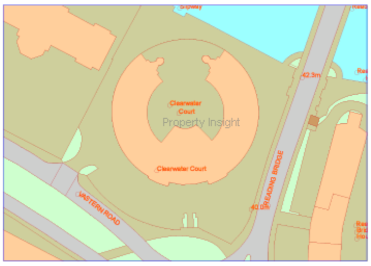
Case products Edit

Product	Supplier		Exc.VAT	VAT	Inc.VAT
CON29DW Residential	Thames Water		40.80	6.12	46.92
		Subtotal	**40.80**	**6.12**	**46.92**
		Case Fee	**0.00**	**0.00**	**0.00**
		Grand total	**40.80**	**6.12**	**46.92**

Case location Edit

Site name	Thames Water Plc
Sub building	
Building number	
Building name	Business Centre
Road name	Vastern Road
Associated road	
Locality	
Town/City	Reading
County	
Postcode	RG1 8DB

Case plan Edit



☐ Please confirm that you accept the Terms & Conditions

Save as Draft Case ▸ | ◂ Previous | Submit ▸

Terms & Conditions | Terms of use | Privacy Policy

Copyright 2008 Thames Water

Check the details shown on screen are correct and you are happy to order. Click **submit** at the bottom of the screen to process your search(es).
You will then be returned to your ‘Case Dashboard’ screen.

If details are **incorrect** in case details, case products or case location click ‘edit’ on section required. This will then return you to the relevant screen in order to change details as necessary.

Search Results

Retrieving Search Results

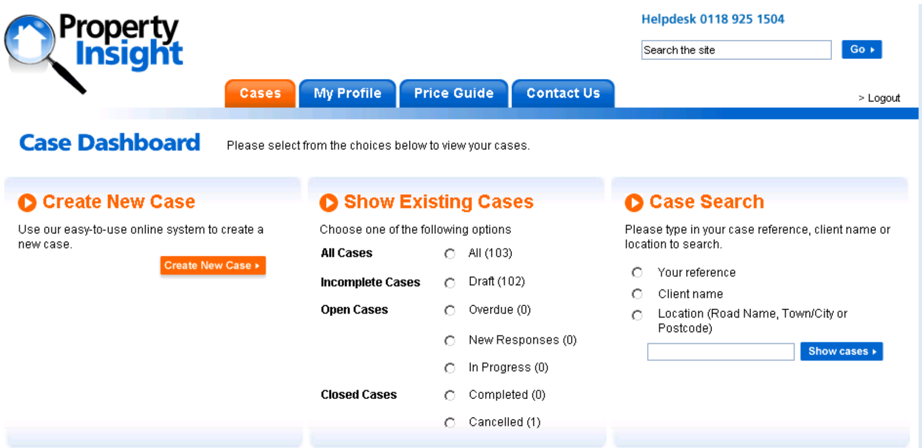
Once a search has been completed the results will be available to download from the case dashboard screen. The status will show as Completed and attachment available under the download section.

Case Management

Show Existing Cases

All existing Cases stored in the **Main Menu (Case Dashboard)** screen can be searched for using the **Show Existing Cases** section and displayed in the **Product Dashboard**

Existing cases can be filtered by **All Cases, Incomplete Cases, Open Cases, and Closed Cases** or searched by your reference, client name or location (using the **Case Search** tool).



Product Dashboard/Case Correspondence History

Within this screen you are able to view the progress and history of an individual case as well as order new products, cancel existing products, Re-Order products and communicate queries or questions with us.

Order New Products

To order a new product to an existing case click 'Add New Product to Case' which will direct you to the product screen (*Please refer back to products section to order new products*)

Cancel Existing Products

To cancel click on the tick box next to the product name and click cancel from the case controls below. Pop up (dialog) box will appear. Click ‘Yes’ to confirm cancellation. This will change the status of product to cancel on the product dashboard screen.

Re-Order Products

Select product by clicking on the “tick box” next to the required. Click “Re-Order” from the pop up box. Click “Yes” if you wish to re-order. This will add the new product to the Product Dashboard screen.

Communicate Queries or Questions with TWPI

If you have a query/question on a particular case then click start a new correspondence with Thames.
Pop up box will appear – select query type, add details of query within your comments then click ‘submit’. If you need to cancel query at any point click ‘cancel’ which will return you to the Product Dashboard screen.