



# 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](http://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.

The screenshot shows the 'My Profile' page on the Property Insight website. The page is divided into several sections, each with a callout box:

- Your Details:** Points to the '1 Profile Details' section, which includes fields for Branch Name (Clearwater Court), Title (Miss), First Name (Melanie), Last Name (Jones), Job Title, User Name (MJones111), Fax Number, Email (melanie.jones@thameswater.co.uk), and Phone1 (01109 236050).
- Default Case Settings – Sector and Transaction:** Points to the '2 Default Case Settings' section, which includes options for Residential and Commercial sectors, and Sale, Purchase, Rental, Development, and Other transaction types.
- Default Response Settings:** Points to the '3 Default Response Settings' section, which includes options for Single Despatch and Despatch Separately, and Web, Fax, Email, Post, and DX communication preferences.
- Default Communication Settings:** Points to the '4 Default Communication Settings' section, which includes options for contact preferences (Web, Email, Phone) and checkboxes for email notifications on case creation and product delays.
- Change Password:** Points to the '5 Change Password' section, which includes fields for Password, New Password, and Confirm New Password, along with a 'Change Password' button.

## Case Dashboard Screen

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

The screenshot shows the Property Insight Case Dashboard. At the top left is the Property Insight logo. To the right is a helpdesk number (0118 925 1504) and a search bar. Below the logo is a navigation bar with buttons for 'Cases', 'My Profile', 'Price Guide', and 'Contact Us', along with a 'Logout' link. The main content area is titled 'Case Dashboard' and includes a sub-header 'Please select from the choices below to view your cases.' There are three main sections: 'Create New Case' with a 'Create New Case' button, 'Show Existing Cases' with radio button options for 'All Cases (440)', 'Incomplete Cases' (Draft: 38, Overdue: 23, New Responses: 0, In Progress: 367), and 'Closed Cases' (Completed: 4, Cancelled: 4), and 'Case Search' with a search input and a 'Show Case' button. Three callout boxes with arrows point to the 'Create Cases' button, the 'View Existing Cases' section, and the 'Case Search' section.

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

A row of four navigation buttons: 'Cancel', 'Save as Draft Case', 'Previous', and 'Next'. The 'Next' button is highlighted in orange, while the others are blue.

## 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.

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Search the site

[Cases](#) [My Profile](#) [Price Guide](#) [Contact Us](#) [Logout](#)

**Create new case** [Case Details](#) [Property Location](#) [Case Plan](#) [Products](#) [Extra Information](#) [Confirmation](#)

**1 Name Your Case \***  
Please either enter a reference or client name to identify your case.  
Your reference   
AND/OR  
Client name

**2 Case Purchase Order**  
If you have a purchase order number for this case, enter it here. We will quote it on your invoice.  
Case purchase order

**3 Sector**  
Choosing the correct sector ensures that the most relevant products are displayed.  
 Residential  Commercial

**4 Transaction Type**  
Choosing the correct transaction type can simplify and quicken the ordering process, as the most relevant products are shown first.  
 Purchase  Sale  Rental  Development  Other

**5 Response Documents Despatch Mode**  
Would you prefer one despatch of all products or would you prefer to receive the products separately?  
 Single Despatch  Despatch Separately

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 cursor on correct location and left click once.
- **Final Case Location** will list address identified.

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Create new case Case Details **Property Location** Case Plan Products Extra Information Confirmation

Please specify the property location/address as you wish it to appear on your search report(s)

**1 Find Location**

Either  
By Postcode RG1 8DB  
Add location for case  
OR  
Locate manually

**2 Select Case Location**

Possible Location  
Thames Water Plc, Business Centre, Vastern Road, Reading, Rg1 8db

**3 Final Case Location\***

Location  
Thames Water Plc, Business Centre, Vastern Road, Reading, Rg1 8db  
>Edit

Submit location

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

## Edit Address Details

**Edit Location**

Site Name  
Sub Building  
Building Number Building Name  
Road Name  
Associated Road  
Locality  
Town / City  
County  
Postcode

Cancel Submit

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

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Please specify the property location/address as you wish it to appear on your search report(s)

**1 Find Location**

Either

By Postcode

OR

**2 Select Case Location**

**3 Final Case Location\***

Click here to locate manually.

### **Specify Location Manually**

Site Name	<input type="text"/>
Sub Building	<input type="text"/>
Building Number	<input type="text"/> Building Name <input type="text"/>
Road Name	<input type="text"/>
Associated Road	<input type="text"/>
Locality	<input type="text"/>
Town / City	<input type="text"/>
County	<input type="text"/>
Postcode	<input type="text"/>
<input type="button" value="Cancel &gt;"/> <input type="button" value="Submit &gt;"/>	

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.

### Prepare a Case plan (Location map)

A "Case Plan" - a map identifying the location - needs creating.  
This helps determine which products are available as some are not available everywhere.

**Choose one option from the following list** - You will need to select one option to fully complete the Create New Case plan online.

#### **▶ Create a case plan using our easy-to-use mapping tool**

- Create a new Case Plan now
  - Case Plan based on previous
- [How to re-use Case Plans](#)

#### **▶ Send in a case plan later**

- By Post/DX
- By Fax

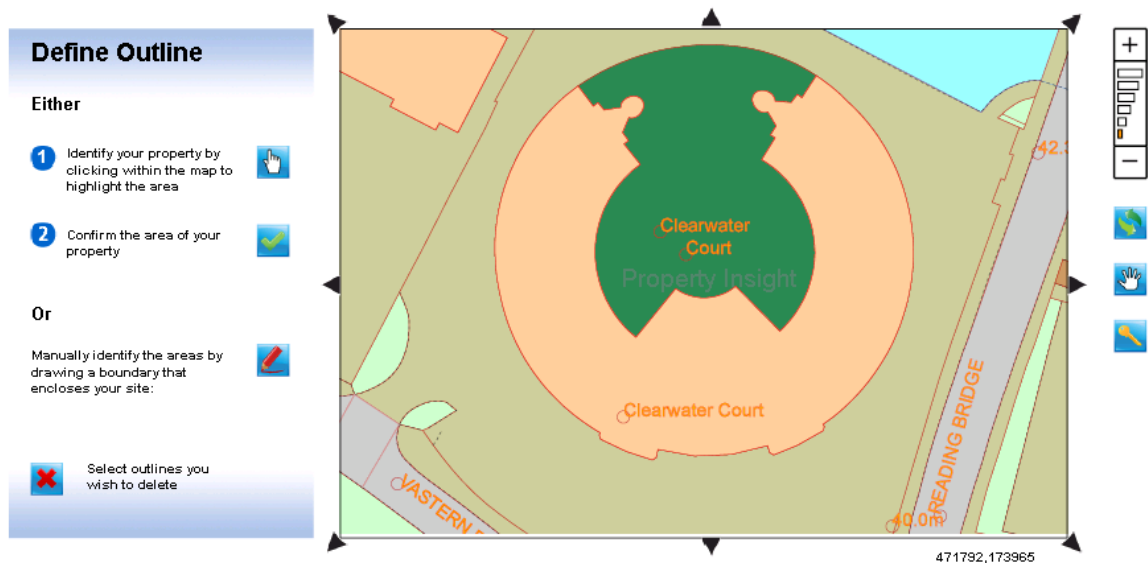
#### **▶ Upload a case plan image file**

- 
- [Help on image files](#)

#### **▶ Order Land Registry Plan from TWPI**

- Order Land Registry Plan from TWPI.  
There is a charge for this service.

## Create a Case Plan using our easy to use mapping tool



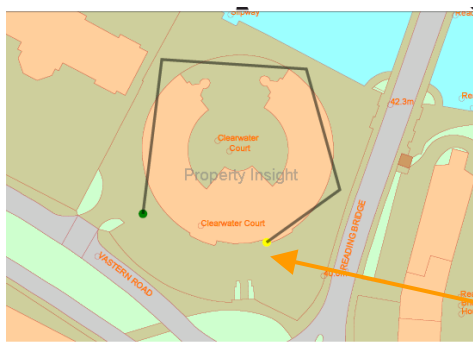
To create an automatic boundary, click on the pointer button and click within the area(s) required with the plan.



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.

Buy	Product(Click for info)	Supplier (Select if needed)	SLA	Ex VAT	VAT	Total
<input type="checkbox"/>	CON29DW Residential	Thames Water	4 Days	37.27	5.59	42.86
<input type="checkbox"/>	CON29DW Expedited - Res	Thames Water	1 Days	69.43	10.42	79.85

exc. VAT	VAT	Total
£ 0.00	£ 0.00	£ 0.00

exc. VAT	VAT	Total
£ 0.00	£ 0.00	£ 0.00

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.

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	exc. VAT	VAT	Total
Total cost of products in GBP	£ 37.27	£ 5.59	£ 42.86

**Additional information, questions or special instructions**  
Type in any additional comments you may have about the case.  
If appropriate these will be responded to before the case is processed - this may affect the time it takes to process the case

Your comments

**Information required by the supplier(s)**  
[Residential Drainage and Water Enquiry, Thames Water](#)

Off Site Road Name (mandatory if property is less than 10 years old)

Name of current occupant or business (optional)

Is the property less than 10 years old?

Name of Developer (mandatory if property is less than 10 years old)

Site Name and Phase (mandatory if property is less than 10 years old)

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 <a href="#">Edit</a>							
Reference	12345	Sector	Residential	Despatch option	Consolidated	Notify delays	No
Case PO		Transaction type	Sales	Despatch method	RM	Client name	

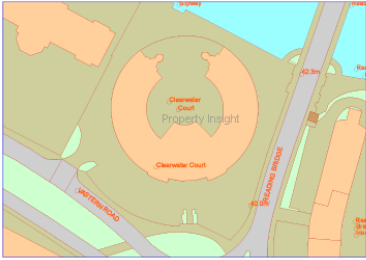
  

Case products <a href="#">Edit</a>				
Product	Supplier	Exc.VAT	VAT	Inc.VAT
CON29DW Residential	Thames Water	40.80	6.12	46.92
Subtotal		40.80	6.12	46.92
Case Fee		0.00	0.00	0.00
Grand total		40.80	6.12	46.92


Case location <a href="#">Edit</a>	
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 <a href="#">Edit</a>	
	

Please confirm that you accept the [Terms & Conditions](#)

[Save as Draft Case](#) [Previous](#) [Submit](#)

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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.

Completed Cases(2)						
Your Reference	Client Name	Location	Date due	Expected	Download	Status
Test LB 2		12, PENNYROYAL COURT, READING, RG1 6HE	13/12/2008	13/12/2008		Completed
R2_MSC2_2.4		7, Elm Lodge Avenue, Reading, RG30 2SR	29/12/2008	29/12/2008		Completed

## 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).

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### Case Dashboard

Please select from the choices below to view your cases.

- Create New Case**  
Use our easy-to-use online system to create a new case.  
[Create New Case >](#)
- Show Existing Cases**  
Choose one of the following options:
  - All Cases**  All (103)
  - Incomplete Cases**  Draft (102)
  - Open Cases**  Overdue (0)  
 New Responses (0)  
 In Progress (0)
  - Closed Cases**  Completed (0)  
 Cancelled (1)
- Case Search**  
Please type in your case reference, client name or location to search.
  - Your reference
  - Client name
  - Location (Road Name, Town/City or Postcode)  
[Show cases >](#)

### 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.