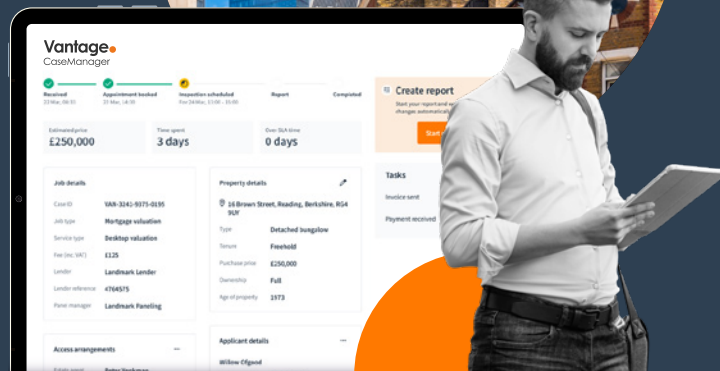


Introducing a streamlined solution with greater efficiency for surveys and valuations.

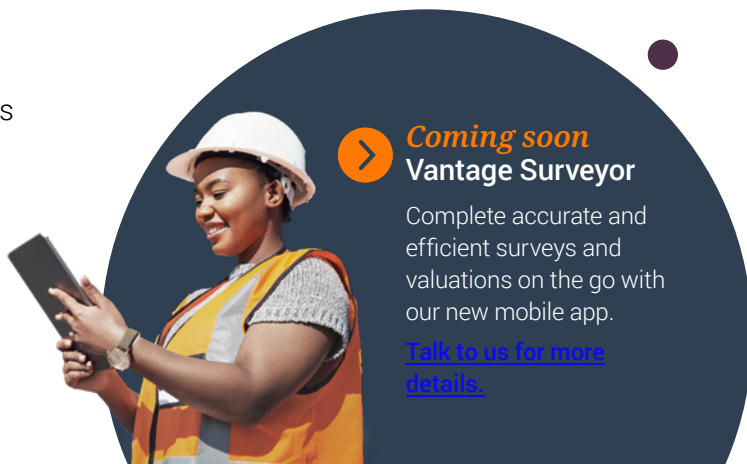


Transform your property valuation and survey process with **Vantage CaseManager** – a cutting-edge solution designed to streamline operations, improve accuracy, and enhance efficiency.

Built with the latest technologies, Vantage CaseManager empowers surveyors and lenders to deliver high-quality, compliant RICS Level 1, 2, and 3 reports with ease. Its intuitive interface, combined with features like RICS standard phrases and customisable templates ensure consistency, and accuracy while saving valuable time.

From support for approved lender phrases to help speed up report creation and ensure compliance, to dynamic lender forms that adapt to the specific valuation scenario, Vantage CaseManager optimises every stage of the valuation instruction. Rich data sharing and tailored validation tools reduce post-valuation queries, helping lenders make informed decisions faster. With Vantage CaseManager, you'll reduce costs, minimise risk, and elevate the customer experience.

Vantage CaseManager is designed to help surveyors streamline the survey and valuation process, improving efficiency and accuracy across all aspects of case management. This modern solution enables smoother workflows, faster report generation, and a more informed valuation process, resulting in fewer post-valuation queries (PVQs) and reduced risk.



The table below shows some of the rich features available within the new Vantage CaseManager and how they compare to DataWeb.

Features	Benefits	iStandard DataWeb	Vantage CaseManager
Create and edit cases	Easily create and update RICS survey cases with intuitive workflows that reduce manual effort and ensure you capture all essential details.	★★★★	★★★★★★
Complete RICS L1-L3 reports	Generate high-quality RICS Level 1, 2, and 3 reports with official RICS templates and the ability to preview before sign-off.	★★★★	★★★★★★
Photo support	Upload and insert property photos into relevant RICS report sections for top-quality documentation.	✗	★★★★★★
RICS phrases	Speed up report creation and ensure consistency with ready-to-use phrases, or your own custom phrases.	✗	★★★★★★
Clear case overview	Get a clear summary view of all cases, customise your view to show the most important information, and filter the list to quickly find the cases you need to work on.	✗	★★★★★★
Case details	Gain a quick understanding of cases with a view that shows all important information and an activity log that shows previous actions taken.	✗	★★★★★★
Case status	Ensure your team can quickly understand what stage a case is at and what needs to be done next with clear case statuses.	✗	★★★★★★
Address lookup	Quickly find addresses and remove manual entry with our address lookup function.	✗	★★★★★★
Simple booking	Streamline the booking process by easily selecting surveyor, date, and appointment time, plus add notes to provide further information on the appointment.	★★★★	★★★★★★
Quick search	Find the cases you need to work on quickly and easily with a search function that lets you search by case reference, postcode, address, client, applicant name, and more.	✗	★★★★★★
Receive lender instructions with richer information	Richer data and files shared by the lender in SPN+ valuation instructions can be easily viewed within Vantage CaseManager, leading to a more informed valuation process. This includes richer property attributes, EPC and tenure information, title plans, and much more.	✗	★★★★★★
Share richer information with lender and panel manager clients	Share high resolution images and important files with lender and panel manager clients to complement your valuation reports, enabling lenders to make better informed lending decisions, and reducing time-consuming PVQs.	★★★★	★★★★★★
Case status sharing	Share status updates in real time with lender clients over SPN+, keeping them updated and reducing chasing.	★★★★	★★★★★★
Complete lender valuation reports	Generate high quality lender reports efficiently through an intuitive UI that highlights any omissions or errors and enables you to preview the report prior to sign-off.	★★★★	★★★★★★
Dynamic forms	Lender forms that can adapt to the specific valuation scenario ensure only the relevant questions are shown to a surveyor, e.g., buy-to-let.	✗	★★★★★★
Valuation phrases	Utilise lenders' approved phrases in your reports, speeding up the process and ensuring you achieve consistent levels of quality and accuracy in your reports.	★★★★	★★★★★★
Scheme 2	Complete Scheme 2 instructions quickly and efficiently. Sign off the lender report separately to the RICS report, helping to ensure you achieve SLAs.	★★★★	★★★★★★
Copy reports	Copy and update reports quickly post-sign off if any queries or issues are raised. You can create as many new versions as you need to.	★★★★	★★★★★★
Data migration	We'll migrate 15 years of your historic case data from DataWeb into Vantage CaseManager as part of the onboarding process, so you'll have easy access to it when you need it.	★★★★	★★★★★★

★★★★ Standard feature ★★★★★★ Upgraded feature



Scan the QR code
for more information.

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