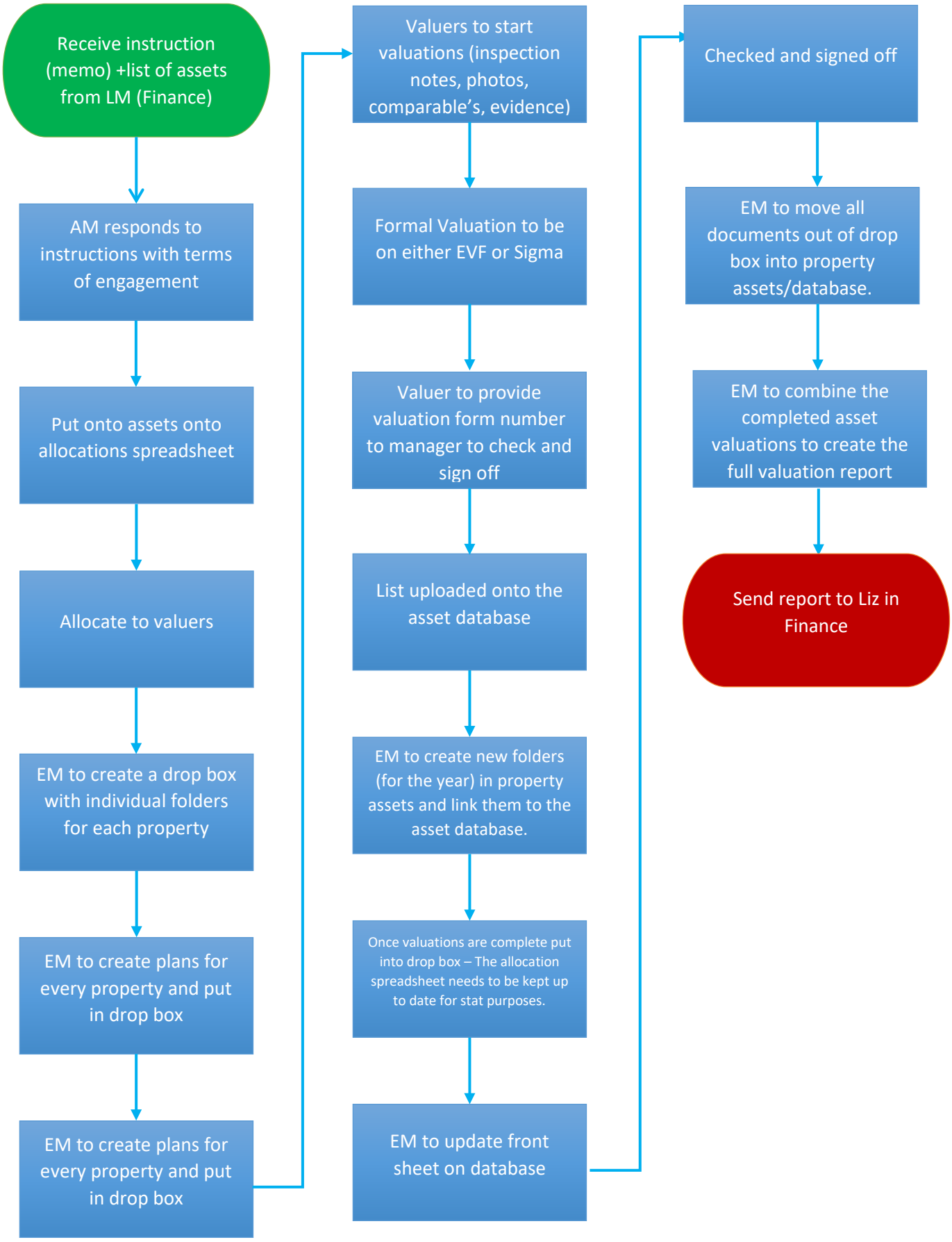
Receive instruction (memo) +list of assets from LM (Finance)
AM responds to instructions with terms of engagement
Put onto assets onto allocations spreadsheet
Allocate to valuers
EM to create a drop box with individual folders for each property
EM to create plans for every property and put in drop box
EM to create plans for every property and put in drop box
Valuers to start valuations (inspection notes, photos, comparable's, evidence)
Formal Valuation to be on either EVF or Sigma
Valuer to provide valuation form number to manager to check and sign off
List uploaded onto the asset database
EM to create new folders (for the year) in property assets and link them to the asset database.
Once valuations are complete put into drop box – The allocation spreadsheet needs to be kept up to date for stat purposes.
EM to update front sheet on database
Checked and signed off
EM to move all documents out of drop box into property assets/database.
EM to combine the completed asset valuations to create the full valuation report
Send report to Liz in Finance