



ESTATE AGENT PRO ENTERPRISE ADDITIONAL INFORMATION

Randall Ken, 12 Brick Street, Westminster, London, W13 7XR

Save & Exit | Cancel & Exit | Clone Client | Print ID's | New | Draft & Sent

File | Communications

General | Identification

Name & Address

Surname: Randall
 Title: Mr [v] Initials: KA
 First Name: Ken
 Greeting: Dear Mr Randall
 Company Name:
 Job Position:
 Address: 12 Brick Street, Westminster, London, W13 7XR

Contact Details

Type	Number/Email	Def	Detail
Phone	020 7491 7777	<input type="checkbox"/>	Home
Phone	020 7992 8888	<input checked="" type="checkbox"/>	Work
Mobile	07872 123456	<input checked="" type="checkbox"/>	
Email	krandall@hotmail.com	<input checked="" type="checkbox"/>	

General | Identification

Data Protection Act Received

Signed: Yes [v] Date: 01/09/2010 [v]

Address

Identification Type: Council Tax [v]
 Details (if Other):
 Account No: 98765432
 Bill Within 3 Months?: Yes [v]
 Date Checked: 01/11/2010 [v]

Remarks:
 Image:

Client

Identification Type: Passport [v]
 Details (if Other):
 Reference No: 12345678
 Expiry Date: 09/07/2015 [v]
 Date Checked: 01/11/2010 [v]
 Date of Birth: 09/07/1963 [v]

Remarks:
 Image:

Categories

Approximate Age: 40 to 50 [v]
 Category (User): Vendors (Current) [v]
 Response Monitoring: Client Recommended [v]
 Review Frequency: 1 Month [v]

Professional Contacts

Estate Agent: Tonbridge Estate Agents, 1 High Street, Tonbridge [v]
 Solicitor:

To avoid having to duplicate data Estate Agent Pro Enterprise is now a client based system. This means that a client can be both an applicant and a vendor. They could even be a plumber as well!

Unlimited contact details can be entered for a single client then, throughout the system where it is displayed, just by clicking on the associated device image you can send an email or text message. If you have a TAPI compliant telephone system you can even place a call directly to them. This screen is also used for adding Solicitors, Estate Agents, Landlords, etc. The marketing module (included free of charge) can then be used to send bulk emails to any type of client or all clients.

Also shown here is the Identification tab where, if a client is an applicant or vendor, you can record the relevant information required under the Money Laundering Regulations 2007 including copies of the relevant documents.

Book your upgrade slot now by notifying technical support of your intention to upgrade.