

GUIDE TO MANDATORY FIELDS

Technology Blueprint Limited

Developer of:

PropCo Enterprise™ Residential Lettings, Management and Accounts Software



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KEY:

-  Indicates a mandatory field

-  Indicates that any one of the fields highlighted must be filled in

-  Field is not mandatory but the user is alerted if they click the relevant tab and then attempt to save / close the record, if it's not filled.

Market Appraisal Form



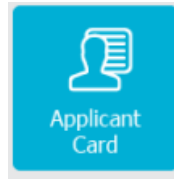
The screenshot below shows the mandatory fields:

The screenshot shows the 'Market Appraisal' form with several fields highlighted in red boxes to indicate they are mandatory. The highlighted fields are:

- How did you hear about us: Board
- Full Name: Ms John Dalton
- Mobile: 07740
- Email: manish@propco.co.uk
- Status: Market Appraisal
- Office: Reading
- Correspondence Address: Dugdale Court, Flat 18, Dugdale Court, Brunswick Street, Leamington Spa, Warwickshire
- Property to Let address: Celia House, Flat 1, Celia House, Arden Estate, London, N1 6RB
- How Long Looking to Let: 12 Months
- Property available from: 04/04/2012
- Rent range: £900.00 to £900.00
- Can we provide an ins. quote: No
- Whilst you are a prospective landlord we may occasionally contact you for our company's product marketing purposes. Would you have any objection? YES

The form also includes sections for 'Owned' (New Landlord, Existing Landlord, Solely, Jointly), 'Enquiry Notes', 'Property Details' (Status, Type, Style, Bedrooms, Parking, Property Age, Furnishings, Office, Why are you looking to let, Been Let before, On with Another Agent, Adv Rent), 'Directions', and 'General Notes'. Buttons for 'Change', 'Copy', and 'Paste' are available for several address fields. At the bottom, there are buttons for 'Book MA' and 'Save Without Booking'.

Applicant Card



The screenshot below shows the mandatory fields:

The screenshot shows the 'Applicant Card' form with the following sections and highlighted mandatory fields:

- Applicant General Information:**
 - Full Name: Mr Ben Boring
 - Full Address: 5 Clemens Street, Leamington Spa, Warwickshire, CV31 2DW
 - Occupation: (empty)
 - DPA Questions: YES NO
- Contact Information:**
 - Status: Looking for Property
 - Email: manish@propco.co.uk
 - Mobile: 07740
 - Tel: (empty)
 - Office Tel: (empty)
 - Evening Tel: (empty)
 - Registered: 04/04/2012
- Primary Matching Criteria:**
 - Price: £900 to £900
 - Minimum Beds: 2
 - Furnishing: Furnished/Unfurnished
 - House Style: Apartment
 - Branch: Bracknell
- General Applicant Question:**
 - How did you hear about us? Board
 - How long looking to rent? 12 months
 - How soon are you looking to move? 04/04/2012
 - Reason for moving? Job Relocation
 - No. of Adults: 0
 - No. of Children: 0
 - Smoker:
 - Pet:
- User specific information:**
 - Negotiator: Tbl Support

Buttons at the bottom: < Back, Next >, Finish, Cancel

Property Record

If the property was added to the system using the MA Form all the mandatory fields should already be filled in

Property Details

The screenshot displays a web application interface for property management. On the left is a 'Navigator' sidebar with a search icon and links for 'Show Search Results', 'Close Search Results', 'Close All', and 'Collapse All'. Below these is a tree view for 'P:000016989-Flat 1' with sub-items: Home, Sales, Property Info (selected), Property Details (highlighted), Rent, Description, Restrictions, Viewings, Marketing Activity, Keys, Marketing, Clauses, Landlords, and Tenants. At the bottom of the sidebar are buttons for 'Diary', 'Report', 'MailMerge', and 'Workflow'.

The main content area is divided into several sections:

- Property Details:** Includes fields for Bathrooms (0), En-suites (0), Garages (dropdown), Bedrooms (0) with a 'Studio' checkbox, Adv. Rent (£900.00) and PCM (dropdown), Property Type (dropdown), Property Age (dropdown), and a 'Property Locations' button.
- Facilities:** Includes Garden (dropdown), Heating (dropdown), Pets (dropdown), Furnishing (dropdown), and Smoke Detectors (dropdown). There are also checkboxes for 'Exclusive Council Tax', 'Exclusive Water', and 'Student Lettings (Will appear on Student Website)'.
- Further Details:** Includes Legacy Ref, Floor, Shower Rooms (0), Member No (0), Reason for letting (Buy To Let dropdown), Property Style (dropdown), Kitchen Style (dropdown), Category (dropdown), Overall Condition (dropdown), and Decorative Condition (dropdown).
- Contact/Appraised/Instruction details:** Includes Appraised (04/04/2012), Instructed (//), Phone(1), and Phone(2) fields.
- Property Checks:** A table of checkboxes:

Has property been let before:	<input type="checkbox"/> YES	<input checked="" type="checkbox"/> NO
Does property have gas:	<input type="checkbox"/> YES	<input type="checkbox"/> NO
Does property have PAT:	<input type="checkbox"/> YES	<input type="checkbox"/> NO
Electrical Indemnity signed by LL:	<input type="checkbox"/> YES	<input type="checkbox"/> NO

User will however see the following alert when they try to close the property record if they click into the **Property Details** tab and the Property Checks are not ticked

Validation checks for entry id #16637

Validation Problems (Flat 1, Celia House, Arden Estate, London)

Please review the following validation issues

Severity	Description
warning	You have not specified if the property has PAT
warning	You have not specified if the Landlord has signed electric indemnity
warning	You have not specified if the property has gas

Rent

Rent / Sales Figures

Default Rates

Rent:

Every: Months

Deposit:

Sale Price:

Other Property Option

Emergency Response

Inception Date:

Renewal Date:

Cancelled Date:

Date Changed:

Rent Review Information

Last Rent Review:

Next Rent Review:

Landlord Outstanding Fees

Exclude from landlord arrears

Landlord Insurance Protection

Aegis Insurance:

RLP Product:

RLP Required

Rent Indemnity Enabled Disabled

Use Rent % @:

Premium:

Valid From:

Expires:

Claims: Manual:

Excess Threshold:

Claims Authorised

Standard Management Fees

Standard Commission:

Second Level Commission(*):

Narrative For Fees:

Narrative For Fees (VAT):

* Information Only

Property Management

Maintenance → Quotation Requests

Create New

Expenditure Limit:

The screenshot below shows the mandatory fields when creating a quotation request:

Quotation Number:

Category:

Full Description:

Contact (on-site):

Ordered By:

Required By:

Access Details:

Quote Status:

Maintenance → Work Orders

Create New

Quote **Work Order** Invoice Recurring Bill Expenditure Limit: £0.00

Remove Refresh Cancel Print Print WO Convert To Invoice Show Paid **Convert To Works** View/Edit Bill Add Notes

The screenshot below shows the mandatory fields when either converting a Quotation Request into a Work Order (WO) or while creating a new Job Sheet / WO:

Works Order

'P13918' 57 Bell Chase, , Managed Reserved Reserve Held: £149.00

Contractors type of work:

Contractor (1028):

Company:
 Address:
 Tel:

Maintenance / Job Commission

Agent Rate 0.0% Amount £0.00

Paid via

Landlord Account
 Tenant Account

Agent Information
 Ref

Works Order No.

Date

Job Type

Descriptor:

Repair Source:

Contact:

Repair Cost:

Ordered By:

Nom Code:

Job Sheet

Required Start Date:

Required Completion Date:

Actual Completion Date:

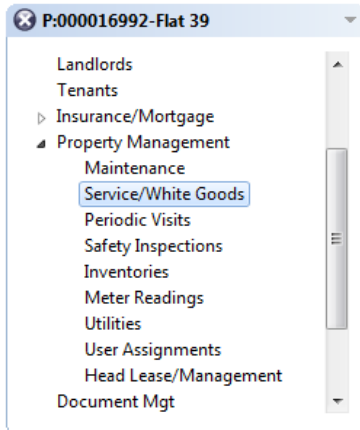
Keys Location:

Return Keys To:

Access Details:

Full Job Description:

Service / White Goods



The screenshot below shows the mandatory and key fields when creating a new white goods certificate:

Certificate
Appliance/Service/Guarantee/Warranty
 Enter the details below and press OK to save information.

Type: ▼

Notes:

Certificate Number:

Membership Number:

Contact:

Contact Number:

Contact Ref:

Supplier/Contact Address:

Star Rating:

Appliance:

Model:

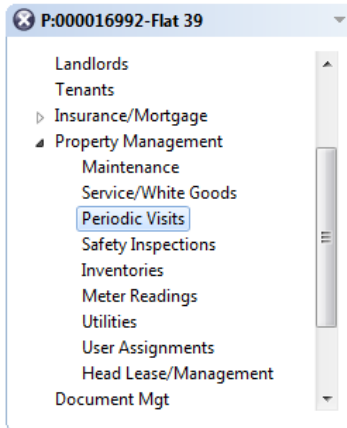
Age:

Serial Number:

Starts:

Expires:

Periodic Visits



The screenshot below shows the mandatory fields when adding a period visit / inspection record:

A screenshot of a 'Management Inspection Details' form window. The title bar shows 'Management Inspection Details (#16785542)'. The form has a header 'Management Inspections'. Fields include: Type (Property Visit), Details (empty), Contact Name (empty), Contact Number (empty), Status (Pending), Visit Number (1), Due Date (01/03/2012, highlighted with a red box), and Comments (empty). An 'Add Tenant Details' button is next to the Contact Name field. At the bottom are buttons for 'OK', 'Cancel', 'View Certificate', and 'Store Certificate (Scan/DocMgt)'.

Landlord Record

If the landlord was added to the system using the MA Form all the mandatory fields should already be filled in

Landlord → Banking

The image shows a 'Banking Details' form with the following sections:

- Legal Name:** Title, Initials, Forename, Surname (all empty).
- Bank Details:**
 - Bank Name: [empty]
 - Location: [empty]
 - Address: [empty]
 - Type: BACS (highlighted in green)
 - Acc Number: 11223344 (highlighted in green)
 - Building Soc: [empty]
 - Sortcode: 10:20:30 (with a 'Validate' button)
 - BACS ID: [empty]
 - Autopay Ref: [empty]
 - Default Bank: [dropdown menu]
 - Last Stmt#: 0
 - Last Date: / /
- Overseas:** No Yes
- Merge Payments
- Reconcile
- Statement Frequency: 1 Days
- Payment Frequency: 0
- Statement Group: Upon Receipt of Monies
- Pay Delay: 0

User will however see the following alert when they try to close the landlord record if they click into the **Banking** tab and these are not completed

Severity	Description
warning	The banking payment type has not been set

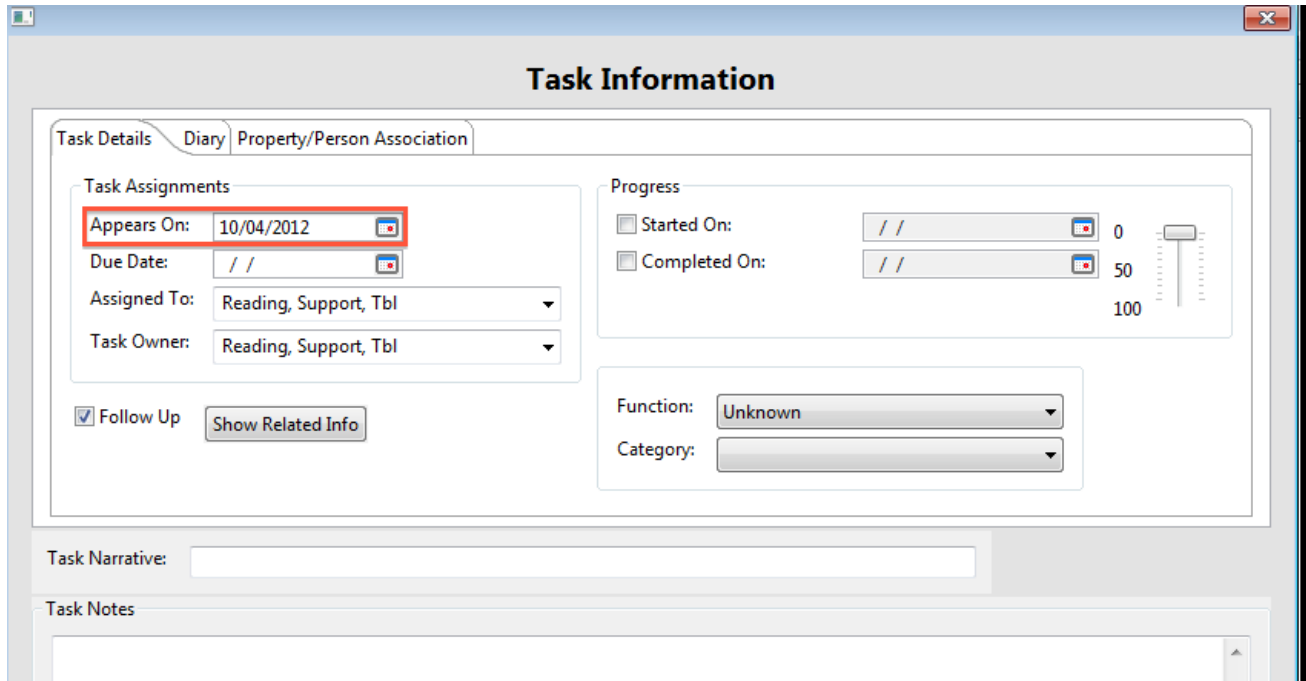
If the banking Type chosen is BACS the user is prompted to complete the bank details

Severity	Description
warning	The `Bank Account Number` is incomplete.
warning	The `Bank Sortcode Number` is incomplete.

Whilst the user can ignore these warnings, they are advised to complete the details if possible.

Task List → New Tasks

The field(s) highlighted must be filled when creating a new task:



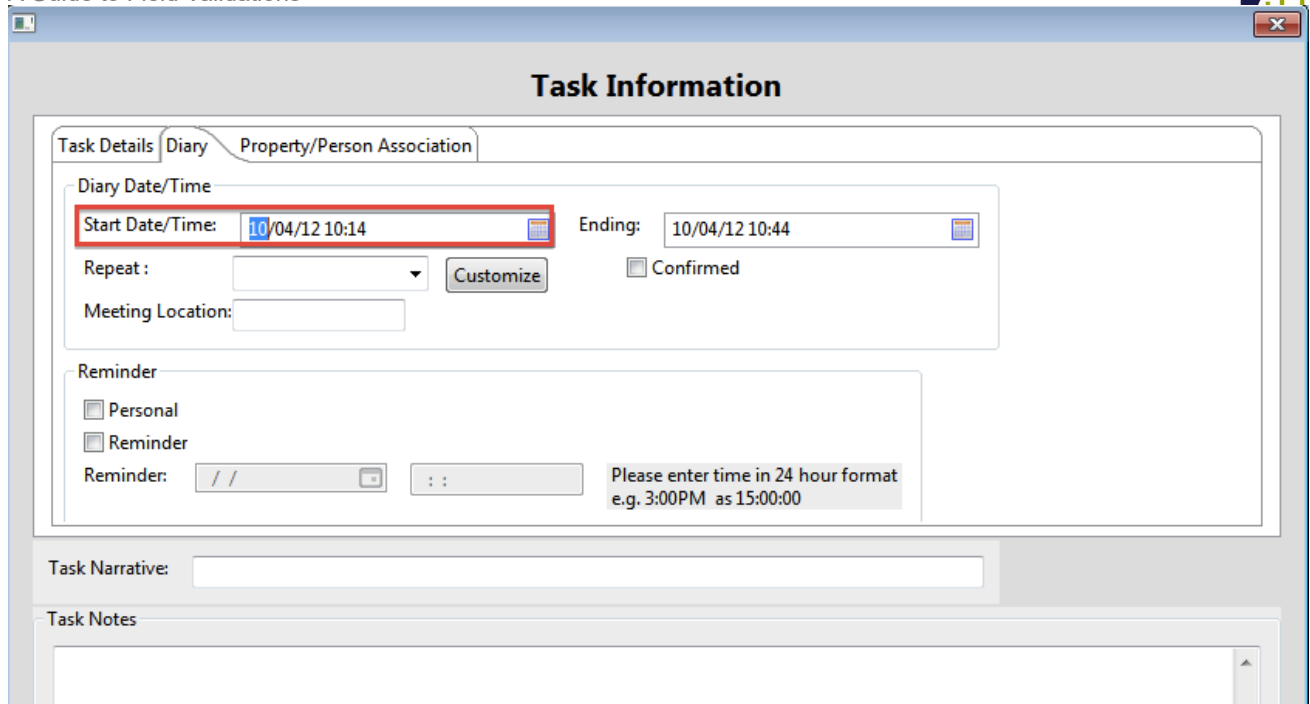
The screenshot shows a web application window titled "Task Information". It has three tabs: "Task Details", "Diary", and "Property/Person Association". The "Task Details" tab is active. The form is divided into several sections:

- Task Assignments:** Contains "Appears On:" (highlighted in red with a date picker showing 10/04/2012), "Due Date:" (date picker), "Assigned To:" (dropdown menu with "Reading, Support, Tbl"), and "Task Owner:" (dropdown menu with "Reading, Support, Tbl").
- Progress:** Includes checkboxes for "Started On:" and "Completed On:", each with a date picker. To the right is a progress bar with markers at 0, 50, and 100.
- Function:** A dropdown menu currently set to "Unknown".
- Category:** An empty dropdown menu.

At the bottom, there are fields for "Task Narrative:" and "Task Notes:".

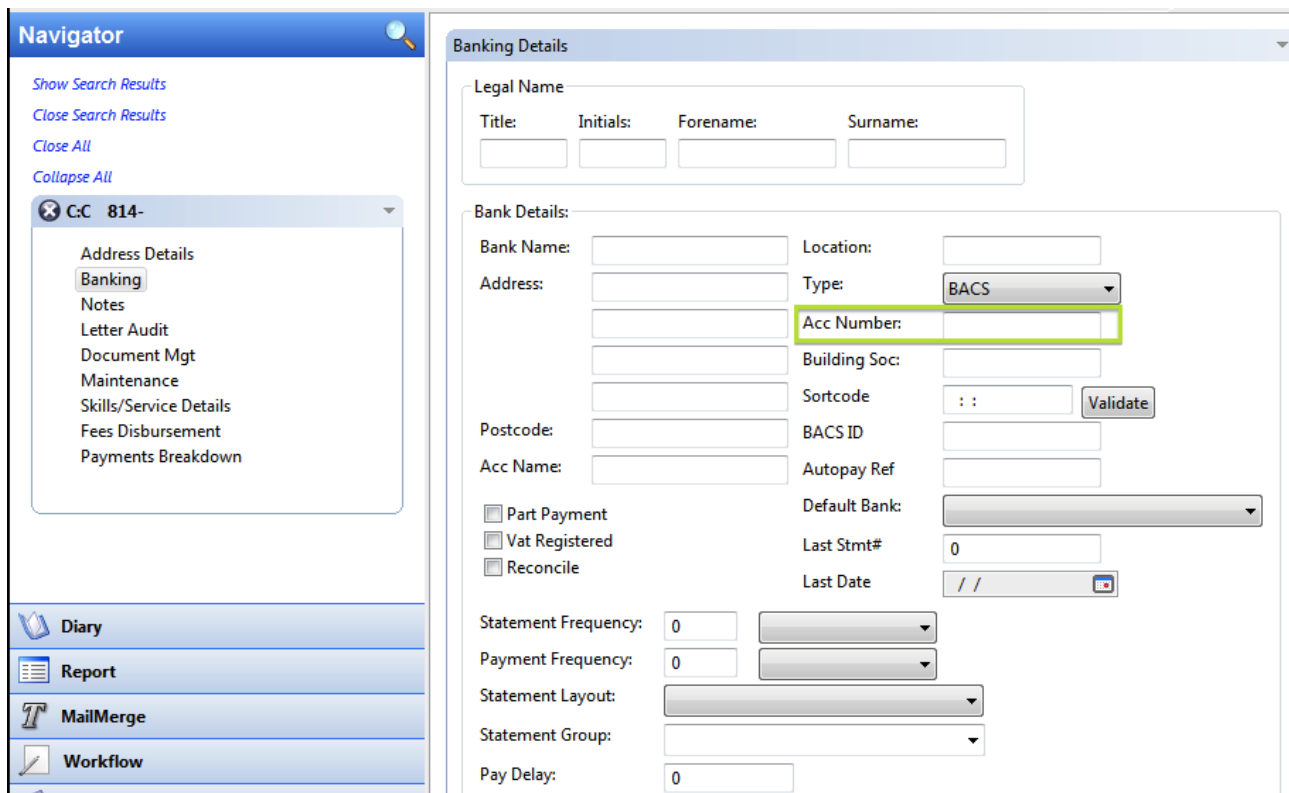
Adding a Diary Appointment

The field(s) highlighted must be filled when adding a diary appointment:



Contractor / Supplier Record → Banking

Whilst not a mandatory field, the system alerts the user if Account Number of the contractor / supplier isn't filled in.



Warning:

Validation checks for entry id #4598 X

Data Validation

Please review the following validation issues

Severity	Description
warning	The `Bank Account Number` is incomplete.