

LetMC.com[®]
lettings software

(Tantum eruditi sunt liberi)

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Creating a New Applicant

There are 5 steps to creating a new applicant on the system

Step 1 Details

MANAGEMENT DETAILS

Branch: Training Branch
Negotiator: -- No Negotiator Assigned --
Source: -- No Source Selected --
Status: -- No Status Selected --
Created: 20/08/2008

APPLICANT PERSONAL DETAILS

Title: Mr
Forename: Gary
Middle Name:
Surname: Barnes
Nationality: United Kingdom
Date of Birth:
Email: jamiea@letmc.com
Mobile Phone:
Land Phone:
Fax Phone:
Permanent Address 1: 22 Garden Road
Permanent Address 2: Cardiff
Permanent Address 3:
Permanent Address 4:
Permanent Postcode: CF24 4AY
Country: United Kingdom
Opt out of general marketing:
Global Reference: apt-55

NOTIFY AUTOMATICALLY OF NEW PROPERTIES

Activate Automatic Notification: until 25/08/2008
Notify by Text: * max one message per day
Notify by EMail: * max one email per week
Notify by Post: * max one letter per week

CONFIDENTIAL NOTES

Complete the **Management details**,

Add the negotiator

Enter the source details of where the applicant first found agency details. More source details can be added in Control Panel

Select the status of the applicant

Applicant Personal Details

Enter the details of the applicant, name address etc.

Notification

Select how the applicant wants to be notified of any available properties. The activation date runs for two months on adding the details. Applicants will only be notified once per day by text, once per week by email and once per week by letter

Finally add any notes that you need.

Notify Automatically of New Properties

When a new applicant is entered onto the system the auto notification is made active by default for 60 days. This period can be changed to suit your needs, call LetMC support for assistance.

There are then three methods of auto notification:

- Notify by Text
- Notify by Email
- Notify by Post

Notify by Text

With Notify by Text selected (this is selected by default) you must ensure that you have entered a mobile number in the applicants' details.

Applicant will receive notification of any new properties entered onto the system and set at the advertised stage. These text messages are set to be sent once a day (maximum). This means that if in one day two properties are moved to advertised, they will only get a text for the first one (to avoid spamming).

NOTIFY AUTOMATICALLY OF NEW PROPERTIES

Activate Automatic Notification: until 17/07/2009
Notify by Text: * max one message per day
Notify by EMail: * max one email per week
Notify by Post: * max one letter per week

Notify by Email

The Notify by Email method requires a valid Email address to be entered in the applicants' details.

Applicant will receive notification of any new properties entered onto the system and set at the advertised stage. These Emails will be sent to the applicant a maximum of once a week (to avoid spamming). The applicant will get an email on the second week if a property is moved to 'advertised' in that week. In the second week, if no property is moved to 'advertised' then no email will be sent.

Notify by Post

Notify by Post requires you to enter the applicants address in their details.

Applicant will receive notification of any new properties entered onto the system and set at the advertised stage. Notifications by post are sent a maximum of once a week (to avoid spamming). The applicant will get a letter on the second week if a property is moved to advertised in that week. In the second week, if no property is moved to advertised then no letter will be sent.

Step 2 Property Criteria

Details	Property Criteria	Matching Property	Send Details	Notes																																																																																									
<p>MATCHING CRITERIA</p> <p>Rent Amount Range: Min £ 450 Max £ 750</p> <p>Number of Bedrooms: Beds From Beds To Or Room in Property <input type="checkbox"/></p> <p>Tenant Type: -- None Selected -- Latest Move In Date Any <input type="button" value="Clear"/></p>																																																																																													
<p>KEYWORDS <small>Not used by Automatic Notification</small></p>																																																																																													
<p>ESSENTIAL MATCHING CRITERIA</p> <p><input checked="" type="checkbox"/> Area <small>*Area(s) must be selected to enable Automatic Notification</small></p> <table border="0"> <tr> <td><input checked="" type="checkbox"/> Adamsdown</td> <td><input checked="" type="checkbox"/> bath</td> <td><input checked="" type="checkbox"/> behill on sea</td> <td><input checked="" type="checkbox"/> Blackwood</td> <td><input checked="" type="checkbox"/> Boverton</td> </tr> <tr> <td><input checked="" type="checkbox"/> brighton</td> <td><input checked="" type="checkbox"/> Cannes</td> <td><input checked="" type="checkbox"/> Cardiff</td> <td><input checked="" type="checkbox"/> Cathays</td> <td><input checked="" type="checkbox"/> Cefn Fforest</td> </tr> <tr> <td><input checked="" type="checkbox"/> cheltenham</td> <td><input checked="" type="checkbox"/> Chester</td> <td><input checked="" type="checkbox"/> City Centre</td> <td><input checked="" type="checkbox"/> Claire Town</td> <td><input checked="" 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type="checkbox"/> test area</td> </tr> </table> <p><input type="checkbox"/> Essential Facilities <small>*these must match the Facilities listed in Modify a Property</small></p> <table border="0"> <tr> <td><input type="checkbox"/> Balcony</td> <td><input type="checkbox"/> Bedroom Two</td> <td><input type="checkbox"/> Cable</td> </tr> <tr> <td><input type="checkbox"/> Dishwasher</td> <td><input type="checkbox"/> Double Glazed</td> <td><input type="checkbox"/> Driveway</td> </tr> <tr> <td><input type="checkbox"/> electric front gates</td> <td><input type="checkbox"/> En suite</td> <td><input type="checkbox"/> Fridge Freezer</td> </tr> <tr> <td><input type="checkbox"/> Garage</td> <td><input type="checkbox"/> Greenhouse</td> <td><input type="checkbox"/> hot tub</td> </tr> <tr> <td><input type="checkbox"/> House Maid</td> <td><input type="checkbox"/> Jacuzzi</td> <td><input type="checkbox"/> NTL</td> </tr> <tr> <td><input type="checkbox"/> Parking</td> <td><input type="checkbox"/> 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Complete the Rent range (Min and Max, mandatory). If required enter number of bedrooms or whether just a room is required (Student Let), select tenant type from the drop down list. From the calendar icon select the latest move-in date for the tenant.

Finally enter any key words which will assist in the search by Keyword function.

In the Essential Matching Criteria use the tick boxes to select the areas that the Applicant is interested in.

Select all facilities that the Applicant requires

Finally select any special requirements.

All the criteria entered will be used in the property matching process.

Step 3 Matching Property

Details	Property Criteria	Matching Property	Send Details	Notes												
<p>MATCHING PROPERTIES</p> <p><input checked="" type="checkbox"/> Matching Properties Unseen <input type="checkbox"/> Past Viewings <input checked="" type="checkbox"/> Future Viewings Arranged <input type="checkbox"/> Unsuitable</p>																
<table border="0"> <tr> <td colspan="2"> <p>Property Suitable</p> <p>No Photo</p> <p>123 Newport Road</p> <p>A delightful furnished bungalow located within walking distance of the local shops and beaches. Available: Now ; Beds: 1 ; Branch: Branch A</p> <p>£600.00</p> <p><input type="button" value="unsuitable"/></p> </td> <td></td> </tr> <tr> <td colspan="2"> <p>2 Patrick Way</p> <p>A well presented first floor studio apartment, situated within easy walking distance of Albany Road and opposite Roath Recreational Ground. This furnished property comprises of open plan lounge, kitchen and bedroom with bed, sofa and all kitchen appliances. Also benefits from a separate shower room, electric heating and double glazing. This property would suit a single professional. Available: Now ; Beds: 1 ; Branch: Branch A</p> <p><input type="button" value="unsuitable"/></p> </td> <td>£650.00</td> </tr> <tr> <td colspan="2"> <p>70 Senghennydd Road</p> <p>Available: Now ; Beds: 1 ; Branch: Branch A</p> <p><input type="button" value="unsuitable"/></p> </td> <td>£600.00</td> </tr> <tr> <td colspan="2"> <p>19 Walker Close</p> <p>Available: Now ; Beds: 1 ; Branch: Branch A</p> <p><input type="button" value="unsuitable"/></p> </td> <td>£450.00</td> </tr> </table>					<p>Property Suitable</p> <p>No Photo</p> <p>123 Newport Road</p> <p>A delightful furnished bungalow located within walking distance of the local shops and beaches. Available: Now ; Beds: 1 ; Branch: Branch A</p> <p>£600.00</p> <p><input type="button" value="unsuitable"/></p>			<p>2 Patrick Way</p> <p>A well presented first floor studio apartment, situated within easy walking distance of Albany Road and opposite Roath Recreational Ground. This furnished property comprises of open plan lounge, kitchen and bedroom with bed, sofa and all kitchen appliances. Also benefits from a separate shower room, electric heating and double glazing. This property would suit a single professional. Available: Now ; Beds: 1 ; Branch: Branch A</p> <p><input type="button" value="unsuitable"/></p>		£650.00	<p>70 Senghennydd Road</p> <p>Available: Now ; Beds: 1 ; Branch: Branch A</p> <p><input type="button" value="unsuitable"/></p>		£600.00	<p>19 Walker Close</p> <p>Available: Now ; Beds: 1 ; Branch: Branch A</p> <p><input type="button" value="unsuitable"/></p>		£450.00
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The Matching property page will show all properties that have matched with the details put in on the previous pages.

The Unsuitable button will be used to enter any feedback as to why the property was not suitable for the prospect and will also remove it from the list.

Step 4 Send Details

Details Property Criteria Matching Property **Send Details** Notes

▶ PRINT MATCHING PROPERTY LIST
Print:

▶ SEND DETAILS BY TEXT
Please fill the mobile phone field in the details tab to send an available properties text message.

▶ SEND LIST OF MATCHING PROPERTY BY POST
Please complete the Applicant's postal address in the Details tab.

▶ SEND LIST OF MATCHING PROPERTY BY EMAIL
Send:

The send details tab will check how you want any notifications sent to the applicant or if you just needed to call up a matching property list. If you need to amend criteria before clicking the Go button, go back to the details tab.

Step 5 Notes

Details Property Criteria Matching Property Send Details **Notes**

▶ ADD GENERAL NOTE TO
Note

▶ NOTES FOR THE 02 MARCH 2008 - 01 SEPTEMBER 2008
Show of notes from 02 March 2008

Messages (0) Property Notes (0) Maintenance (0) Certificates (0) General (0)

Note	Created At	Related To
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Enter any notes on the applicant that you need to record on the system. You can also call back any previous notes

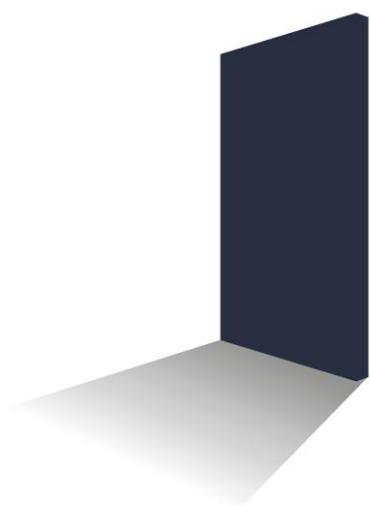
Create Applicant from Tenant

This process is similar to that of creating a new applicant. This time you will need to search for the tenant that you want to add as an applicant.

If you have a tenant that is now nearing the end of their current tenancy and they wish to seek another property you can easily transfer their existing details. Select Applicants and Add Applicant from Tenant, complete the search criteria for the tenant you are looking for tick the check box next to the tenants name then click next. You will now see that their details have now been added to the applicants details screen, check and update the tenants' details as necessary. The Notes Tab will now show as Confidential Notes. Click **Finish** to add as an applicant.

Modify Applicant Card

Selecting Modify Applicant Card from the menu will open the search criteria screen. Complete the details of the applicant that you require to modify and click next. When you are satisfied that you can see the applicant you want to edit tick the box next to their name, click **Next**. You will now be able to go through all the screens as in Add an applicant to make any changes.



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