1. **INSTANT VALUATION FORM-**

* FIRST NAME-
* LAST NAME-
* EMAIL ADRESS-
* CONTACT NUMBER-
* POST CODE-
* ADDRESS- (after they enter the post code the drop down with the list of house numbers with respect to that post codes should come up and user should select the appropriate address)
* WHAT WOULD YOU LIKE TO DO?
* SELL MY PROPERTY
* LET MY PROPERTY
* JUST CURIOUS
* REMORTGAGING / RENOVATION / PURCHASING
* WHEN WOULD YOU LIKE TO SELL THE PROPERTY?
* 0 – 3 MONTHS
* 3 – 6 MONTHS
* 6+ MONTHS
* ADDITIONAL MESSAGE (Optional): [Text box for additional details]
* BEST WAY TO CONTACT YOU (OPTIONAL)
* EMAIL
* PHONE
* EITHER
* BEST TIME TO CONTACT YOU (OPTIONAL)
* MORNING
* AFTERNOON
* EVENING
* ANYTIME
* SUBMIT

**POP MESSAGE** **AFTER CLICKING SUBMIT-**

"Thank you for submitting your details. A confirmation will be sent to your provided email address shortly.

Rest assured; we value your privacy. In accordance with GDPR guidelines, only your name and contact number will be shared with our selected agents. They will reach out to you regarding your property valuation.

Have a great day!"

1. **CHAT BOT FORM-**

* FIRST NAME-
* LAST NAME-
* EMAIL ADDRESS-
* CONTACT NUMBER-
* QUERY REGARDING-
* LETTING PROPERTY
* LETTED PROPERTY
* FOR SALE PROPERTY
* SOLD PROPERTY
* ADDITIONAL INFORMATION (Optional): [Text box for additional details]
* BEST WAY TO CONTACT YOU (OPTIONAL)
* EMAIL
* PHONE
* EITHER
* BEST TIME TO CONTACT YOU (OPTIONAL)
* MORNING
* AFTERNOON
* EVENING
* ANYTIME
* SUBMIT

"Thank you for reaching out! We appreciate your inquiry. Our automated system will do its best to assist you.

If your query can be resolved through the chatbot, you'll receive prompt answers. However, if your question requires human assistance, and it's within our office hours, one of our agents will connect with you shortly.

Please note that our office hours are 10 AM- 06 PM. If an agent is available, they will join the conversation to provide personalized assistance.

In the meantime, feel free to provide more details about your inquiry, and we'll do our best to assist you. Thank you for your patience!"

1. **THE INFORMATION/DETAILS REQUIRED FOR ADMIN TO MAKE SOMEONE AS AGENT-**

* Company name
* Company address
* Company Registration number
* Bank details
* Assignee person name
* VAT (EVERY INVOICE WILL BE SEPARATE WITH RESPECT TO AGENT VAT PERCENTAGE**)**

1. **TYPES OF PROPERTIES FOR SALE-**

* COMMERCIAL (SALE/RENT/LEASE)
* RESIDENTIAL

DIFFERENT TYPES OF COMMERCIAL PROPERTIES WE GET FOR SALE/RENT/LEASE-

1. **Office Spaces:**
   * Single offices
   * Office suites
   * Shared workspaces or co-working spaces
2. **Retail Spaces:**
   * Street-level retail shops
   * Shopping mall units
   * Standalone retail buildings
3. **Industrial Properties:**
   * Warehouses
   * Manufacturing facilities
   * Distribution centers
4. **Hospitality Properties:**
   * Hotels
   * Motels
   * Bed and breakfasts
5. **Medical Spaces:**
   * Clinics
   * Medical offices
   * Hospitals
6. **Special Purpose Properties:**
   * Restaurants
   * Gas stations
   * Car dealerships
7. **Multi-family Properties:**
   * Apartment buildings
   * Condominiums
   * Townhouses
8. **Flex Spaces:**
   * Combining office and warehouse space
   * Adaptable for various uses
9. **Land for Commercial Development:**
   * Parcels of land zoned for commercial purposes
10. **Technology Parks:**
    * Areas with a concentration of technology-related businesses
11. **Entertainment Venues:**
    * Theaters
    * Event spaces
    * Amusement parks
12. **Educational Facilities:**
    * Schools
    * Training centers
    * Educational institutions
13. **Storage Facilities:**
    * Self-storage units
    * Storage warehouses
14. **Green Spaces:**
    * Agricultural land
    * Nurseries
15. **Government Buildings:**
    * Government offices
    * Municipal buildings

DIFFERENT TYPES OF RESIDENTIAL PROPERTIES WE GET FOR SALE/RENT/LEASE- (COMPANY LET ONLY)

1. **Apartments/Flats:**
   * Studio Apartments
   * One-Bedroom Apartments
   * Two-Bedroom Apartments
   * Penthouse Apartments
2. **Houses:**
   * Detached Houses
   * Semi-Detached Houses
   * Terraced Houses
   * Townhouses
3. **Serviced Apartments:**
   * Furnished Apartments with Services
   * Ideal for Short-Term Stays
4. **Bungalows:**
   * Single-Storey Residential Homes
5. **Maisonettes:**
   * Multi-Level Apartments
6. **Duplexes:**
   * Apartments or Houses with Two Levels
7. **Lofts:**
   * Converted Industrial Spaces into Residential Units
8. **Cottages:**
   * Cozy, Small Residential Houses
9. **Housing Developments:**
   * Planned Residential Communities
10. **Retirement Homes:**
    * Specifically Designed for Senior Living
11. **Student Accommodations:**
    * Housing Units Geared Towards Students
12. **Gated Communities:**
    * Properties within Secured Enclosures
13. **Shared Housing/Rooms:**
    * Individual Rooms within a Shared House
14. **Country Homes:**
    * Rural Residential Properties
15. **Eco-Friendly Homes:**
    * Environmentally Sustainable Residences
16. **Period Homes:**
    * Historic or Architecturally Unique Residences
17. **Luxury Residences:**
    * High-End, Premium Properties
18. **Floating Homes:**
    * Residences on Water, Such as Houseboats
19. **Converted Spaces:**
    * Former Warehouses, Factories, or Churches Converted into Homes
20. **Manors and Estates:**
    * Large, Stately Residences with Extensive Grounds
21. **CONFIRMATION FOR MORTAGE CALCULATOR AND STAMP DUTY?**

WE NEED THIS ONLY FOR SALE PROPERTIES NOT FOR LETING PROPERTIES.

1. **RENEWAL REQUEST FORM FOR RENTAL AGREEMENT-**

**WE HAVE THREE TYPES FOR LETTING-**

* LET ONLY
* MANAGEMENT ONLY
* INTRODUCE ONLY

**RENEWAL REQUEST FORM RAISED FROM LANDLORD SIDE WHICH WILL GO TO AGENT PANEL-**

**LANDLORD RENEWAL REQUEST FORM: (not all fields are mandatory once they raise the request agent will verify and update the missing details and acknowledge and approve the request)**

**Renewal Request Details:**

* Landlord's Full Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* Landlord's Email address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* Landlord's Phone number: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* Property Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* Agent Full Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* Agent email id: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* Agent Phone Number: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* Tenant Full Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* Tenant email id: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* Tenant Phone Number: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* Type of Letting: (select anyone option)
  + Let Only
  + Management Only
  + Introduce Only

**RENEWAL OPTIONS:**

Please indicate your preference:

* Renew the lease under the same terms and conditions.
* Request for modifications as detailed below.
* Discuss further with the agent.

**Renewal Terms:**

* Desired Renewal Duration: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ months
* Proposed Rent Increase (if any): £\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Landlord Acknowledgment:**

I, the undersigned landlord, hereby acknowledge and request the renewal of the tenancy agreement for the property mentioned above.

Landlord's Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

*For Agent's Use Only:*

**AGENT'S RESPONSE:**

* **Approval for Renewal: Approved/Disapproved**
* **Additional Conditions/Comments:**

I, the undersigned agent, hereby acknowledge and process the renewal request for the tenancy agreement for the property mentioned above.

**Agent's Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_**

This renewal request form is designed to accommodate details from both the user side (tenant/landlord) and the agent side. Users can specify the type of letting and propose renewal terms, while the agent can provide recommendations and respond to the request.

**RENEWAL REQUEST FORM RAISED FROM USER/TENANT SIDE WHICH WILL GO TO AGENT PANEL-**

**USER RENEWAL REQUEST FORM: (not all fields are mandatory once they raise the request agent will verify and update the missing details and acknowledge and approve the request)**

**Renewal Request Details:**

* Tenant's Full Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* Tenant email id: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* Tenant Phone Number: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* Property Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* Agent Full Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* Agent email id: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* Agent Phone Number: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* Landlord's Full Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* Landlord's Email address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* Landlord's Phone number: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* Type of Letting:
  + Let Only
  + Management Only
  + Introduce Only

**RENEWAL OPTIONS:**

Please indicate your preference:

* Renew the lease under the same terms and conditions.
* Request for modifications as detailed below.
* Discuss further with the agent.

**Renewal Terms:**

* Preferred Renewal Duration: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ months
* Any Specific Requests or Concerns: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Tenant Acknowledgment:**

I, the undersigned tenant, hereby acknowledge and request the renewal of the tenancy agreement for the property mentioned above.

Tenant's Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

*For Agent's Use Only:*

**AGENT'S RESPONSE:**

* **Approval for Renewal: Approved/Disapproved**
* **Additional Conditions/Comments:**

I, the undersigned agent, hereby acknowledge and process the renewal request for the tenancy agreement for the property mentioned above.

**Agent's Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_**

This renewal request form is designed to accommodate details from both the user side (tenant/landlord) and the agent side. Users can specify the type of letting and propose renewal terms, while the agent can provide recommendations and respond to the request.

**RENEWAL REQUEST FORM RAISED FROM AGENT SIDE WHICH WILL GO TO RESPECTIVE LANDLORD OR TENANT PANEL-**

**AGENT RENEWAL REQUEST FORM: (all fields are mandatory)**

**Renewal Request Details:**

* Agent's Full Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* Agent email id: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* Agent Phone Number: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* Property Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* Tenant's Full Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* Tenant email id: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* Tenant Phone Number: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* Landlord's Full Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* Landlord's Email address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* Landlord's Phone number: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* Type of Letting:
  + Let Only
  + Management Only
  + Introduce Only

**RENEWAL OPTIONS:**

Please indicate your preference:

* Renew the lease under the same terms and conditions.
* Request for modifications as detailed below.
* Discuss further with the agent.

**Renewal Terms:**

* Recommended Renewal Duration: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ months.
* Any Comments or Recommendations: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Acknowledgment:**

I, the undersigned agent, hereby acknowledge and process the renewal request for the tenancy agreement for the property mentioned above.

Agent's Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**User Acknowledgment:**

I, the undersigned user, hereby acknowledge and request the renewal of the tenancy agreement for the property mentioned above.

User's Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

1. **INVENTORY CHECKLIST FORM FOR BEFORE MOVING IN AND BEFORE MOVING OUT-**

**INVENTORY CHECKLIST FORM FROM LANDLORD BEFORE GIVING THE PROPERTY FOR LET ONLY OR MANAGEMENT ONLY PROPERTY TO AGENTS-**

### INVENTORY CHECKLIST FORM

**Landlord Details:**

* Landlord's Full Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* Property Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Type of Letting:**

* Let Only
* Management Only

### ROOM-BY-ROOM INVENTORY:

#### **Living Room:**

* Sofa: \_\_\_\_\_\_\_\_\_\_
* Coffee Table: \_\_\_\_\_\_\_\_\_\_
* Chairs: \_\_\_\_\_\_\_\_\_\_
* Television: \_\_\_\_\_\_\_\_\_\_
* Other (Specify): \_\_\_\_\_\_\_\_\_\_

#### **Kitchen:**

* Refrigerator: \_\_\_\_\_\_\_\_\_\_
* Oven/Stove: \_\_\_\_\_\_\_\_\_\_
* Microwave: \_\_\_\_\_\_\_\_\_\_
* Dining Table: \_\_\_\_\_\_\_\_\_\_
* Utensils (Specify): \_\_\_\_\_\_\_\_\_\_

#### **Bedrooms:**

* Beds (Specify): \_\_\_\_\_\_\_\_\_\_
* Mattresses: \_\_\_\_\_\_\_\_\_\_
* Wardrobes: \_\_\_\_\_\_\_\_\_\_
* Bedside Tables: \_\_\_\_\_\_\_\_\_\_
* Bed Linens (Specify): \_\_\_\_\_\_\_\_\_\_

#### **Bathrooms:**

* Shower/Bathtub: \_\_\_\_\_\_\_\_\_\_
* Toilet: \_\_\_\_\_\_\_\_\_\_
* Towels (Specify): \_\_\_\_\_\_\_\_\_\_
* Vanity: \_\_\_\_\_\_\_\_\_\_
* Other (Specify): \_\_\_\_\_\_\_\_\_\_

#### **Other Rooms/Spaces:**

* Study Room
* Laundry Room
* Storage Room

### GENERAL PROPERTY ITEMS:

* Curtains/Blinds: \_\_\_\_\_\_\_\_\_\_
* Carpets/Rugs: \_\_\_\_\_\_\_\_\_\_
* Lighting Fixtures: \_\_\_\_\_\_\_\_\_\_
* Heating System: \_\_\_\_\_\_\_\_\_\_
* Air Conditioning: \_\_\_\_\_\_\_\_\_\_
* Fire Safety Equipment: \_\_\_\_\_\_\_\_\_\_

### OUTDOOR AREA:

* Garden Furniture: \_\_\_\_\_\_\_\_\_\_
* Lawn Equipment: \_\_\_\_\_\_\_\_\_\_
* Outdoor Lighting: \_\_\_\_\_\_\_\_\_\_
* Other (Specify): \_\_\_\_\_\_\_\_\_\_

### ADDITIONAL NOTES OR SPECIAL INSTRUCTIONS:

**ACKNOWLEDGMENTS:**

I, the undersigned landlord, confirm that the items listed above are provided in the property and are in good condition.

Landlord's Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

I, the undersigned agent, acknowledge receipt of the inventory checklist and confirm its accuracy.

Agent's Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**INVENTORY CHECKLIST FORM FROM AGENT BEFORE MOVING IN TO THE PROPERTY TO TENANT-**

**INVENTORY MOVING-IN CHECKLIST FORM**

**Property Details:**

* Property Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* Agent's Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* Agent’s email address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* Agent’s Phone number: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* Tenant's Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* Tenant’s email address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* Tenant's Phone number: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

### ROOM-BY-ROOM INVENTORY:

#### **Living Room:**

* Sofa: \_\_\_\_\_\_\_\_\_\_
* Coffee Table: \_\_\_\_\_\_\_\_\_\_
* Chairs: \_\_\_\_\_\_\_\_\_\_
* Television: \_\_\_\_\_\_\_\_\_\_
* Other (Specify): \_\_\_\_\_\_\_\_\_\_

#### **Kitchen:**

* Refrigerator: \_\_\_\_\_\_\_\_\_\_
* Oven/Stove: \_\_\_\_\_\_\_\_\_\_
* Microwave: \_\_\_\_\_\_\_\_\_\_
* Dining Table: \_\_\_\_\_\_\_\_\_\_
* Utensils (Specify): \_\_\_\_\_\_\_\_\_\_

#### **Bedrooms:**

* Beds (Specify): \_\_\_\_\_\_\_\_\_\_
* Mattresses: \_\_\_\_\_\_\_\_\_\_
* Wardrobes: \_\_\_\_\_\_\_\_\_\_
* Bedside Tables: \_\_\_\_\_\_\_\_\_\_
* Bed Linens (Specify): \_\_\_\_\_\_\_\_\_\_

#### **Bathrooms:**

* Shower/Bathtub: \_\_\_\_\_\_\_\_\_\_
* Toilet: \_\_\_\_\_\_\_\_\_\_
* Towels (Specify): \_\_\_\_\_\_\_\_\_\_
* Vanity: \_\_\_\_\_\_\_\_\_\_
* Other (Specify): \_\_\_\_\_\_\_\_\_\_

#### **Other Rooms/Spaces:**

* Study Room
* Laundry Room
* Storage Room

### GENERAL PROPERTY ITEMS:

* Curtains/Blinds: \_\_\_\_\_\_\_\_\_\_
* Carpets/Rugs: \_\_\_\_\_\_\_\_\_\_
* Lighting Fixtures: \_\_\_\_\_\_\_\_\_\_
* Heating System: \_\_\_\_\_\_\_\_\_\_
* Air Conditioning: \_\_\_\_\_\_\_\_\_\_
* Fire Safety Equipment: \_\_\_\_\_\_\_\_\_\_

### OUTDOOR AREA:

* Garden Furniture: \_\_\_\_\_\_\_\_\_\_
* Lawn Equipment: \_\_\_\_\_\_\_\_\_\_
* Outdoor Lighting: \_\_\_\_\_\_\_\_\_\_
* Other (Specify): \_\_\_\_\_\_\_\_\_\_

**Acknowledgments:**

I, the undersigned tenant, acknowledge that the above-listed items are present and in satisfactory condition as of the move-in date.

**Tenant's Signature:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ **Date:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

I, the undersigned agent, acknowledge the completion of the inventory check and confirm the condition of the items listed above.

**Agent's Signature:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ **Date:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Comments/Notes:**

[Text boxes for additional comments or notes]

**INVENTORY CHECKLIST FORM FROM AGENT BEFORE MOVING OUT TO THE PROPERTY TO TENANT-**

**INVENTORY MOVING-IN CHECKLIST FORM**

**Property Details:**

* Property Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* Agent's Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* Agent’s email address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* Agent’s Phone number: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* Tenant's Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* Tenant’s email address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* Tenant's Phone number: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

### ROOM-BY-ROOM INVENTORY:

#### **Living Room:**

* Sofa: \_\_\_\_\_\_\_\_\_\_
* Coffee Table: \_\_\_\_\_\_\_\_\_\_
* Chairs: \_\_\_\_\_\_\_\_\_\_
* Television: \_\_\_\_\_\_\_\_\_\_
* Other (Specify): \_\_\_\_\_\_\_\_\_\_

#### **Kitchen:**

* Refrigerator: \_\_\_\_\_\_\_\_\_\_
* Oven/Stove: \_\_\_\_\_\_\_\_\_\_
* Microwave: \_\_\_\_\_\_\_\_\_\_
* Dining Table: \_\_\_\_\_\_\_\_\_\_
* Utensils (Specify): \_\_\_\_\_\_\_\_\_\_

#### **Bedrooms:**

* Beds (Specify): \_\_\_\_\_\_\_\_\_\_
* Mattresses: \_\_\_\_\_\_\_\_\_\_
* Wardrobes: \_\_\_\_\_\_\_\_\_\_
* Bedside Tables: \_\_\_\_\_\_\_\_\_\_
* Bed Linens (Specify): \_\_\_\_\_\_\_\_\_\_

#### **Bathrooms:**

* Shower/Bathtub: \_\_\_\_\_\_\_\_\_\_
* Toilet: \_\_\_\_\_\_\_\_\_\_
* Towels (Specify): \_\_\_\_\_\_\_\_\_\_
* Vanity: \_\_\_\_\_\_\_\_\_\_
* Other (Specify): \_\_\_\_\_\_\_\_\_\_

#### **Other Rooms/Spaces:**

* Study Room
* Laundry Room
* Storage Room

### GENERAL PROPERTY ITEMS:

* Curtains/Blinds: \_\_\_\_\_\_\_\_\_\_
* Carpets/Rugs: \_\_\_\_\_\_\_\_\_\_
* Lighting Fixtures: \_\_\_\_\_\_\_\_\_\_
* Heating System: \_\_\_\_\_\_\_\_\_\_
* Air Conditioning: \_\_\_\_\_\_\_\_\_\_
* Fire Safety Equipment: \_\_\_\_\_\_\_\_\_\_

### OUTDOOR AREA:

* Garden Furniture: \_\_\_\_\_\_\_\_\_\_
* Lawn Equipment: \_\_\_\_\_\_\_\_\_\_
* Outdoor Lighting: \_\_\_\_\_\_\_\_\_\_
* Other (Specify): \_\_\_\_\_\_\_\_\_\_

**Acknowledgments:**

I, the undersigned tenant, acknowledge that the above-listed items are present and in satisfactory condition as of the move-out date.

**Tenant's Signature:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ **Date:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

I, the undersigned agent, acknowledge the completion of the inventory check and confirm the condition of the items listed above.

**Agent's Signature:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ **Date:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Comments/Notes:**

[Text boxes for additional comments or notes]

1. **INVOICE BILLING –**
2. **DIRECTLY FROM THE INVOICE GENERATOR BUTTON-**
3. User Interface:

Create a functionality in the Agent interface labelled "Generate Invoice/ Invoice Generator."

1. Options Selection:

When the "Generate Invoice" button is clicked, present two options: "Tenant" or "Landlord."

Depending on the selection, display a form for the agent to proceed.

1. Property ID Entry:

Provide an option to enter the property ID.

Utilize this information to auto-fill tenant/landlord details such as full name, address, and contact details.

1. Manual Entry:

If the agent chooses not to use the property ID, provide fields for manual entry of tenant details (first name, last name, contact details, address, email).

Where while entering the address once the post code is entered and we should get a auto drop down to select the house address with respect to the post code.

1. Service Selection:

After entering tenant/landlord details, present a list of services with checkboxes (e.g., rent, maintenance, utilities).

Allow the agent to select multiple services, enter quantities, and amounts for each.

List of Services:

* Property Sales:
* Commission for property sales transactions.
* Marketing and advertising fees.
* Legal and documentation charges.
* Rental Services:
* Rent.
* Lease renewal fees.
* Holding deposit
* Deposit
* Sourcing (Only from Agent to Landlord)
* Property Management:
* Monthly property management fees.
* Maintenance and repair charges.
* Inspection and inventory services.
* Utilities and Services:
* Collection of utility payments (water, electricity, gas).
* Property cleaning or housekeeping services.
* Security services.
* Consultancy and Advisory:
* Consultancy fees for property investment advice.
* Advisory fees for market analysis and property valuation.
* Legal and Documentation:
* Legal consultation fees.
* Contract processing charges
* Document preparation and processing charges. (Monthly Contracts, AST(Assured Short Hold Tenancies, Rent to Rent)
* Title search and registration fees.
* Additional Services:
* Property valuation and appraisal fees.
* Insurance services for properties.
* Tenant screening fees.
* Late Payment or Penalties:
* Late payment fees or penalties for overdue rent or other charges.
* Miscellaneous Fees:
* Any other service-specific fees or charges applicable to the sales and letting business.

1. Summary Confirmation:

Display a summary of entered information, including tenant details and selected services with quantities and amounts.

Provide a "Next" or "Submit" button to proceed.

1. Invoice Generation:

Upon submission, generate the invoice with auto-filled details from the selected options.

Include all relevant information, such as tenant details, selected services, quantities, and amounts.

1. Confirmation and Accessibility:

Provide a confirmation message or a link to access/download the generated invoice.

Save the invoice details in the system for future reference and reporting.

Send the invoice for the correct person with an auto-generated email.

1. **FROM THE MY PROPERTIES TAB -GENERATING INVOICE –**

QUITE SIMILAR TO ABOVE STEPS (HAVE ALREADY DISCUSSED WITH DEVELOPERS ON THIS)

**AN INVOICE SHOULD CONTAIN –**

**\*\*EVERYTHIING SHOULD BE WITHIN THE COMPANY LETTER HEAD\*\***

AGENT ID

AGENT EMAIL ID

AGENT CONTACT NUMBER

OFFICE ADDRESS AND CONTACT NUMBER

DATE

INVOICE NUMBER(UNIQUE)

TENANT/LANDLORD INFORMATION

TABLE OF CONTENTS

1. **PERMISSIONS-**

**ROLES WITH RESPECT TO AGENT PANEL –**

**1. Construction:(Future Scope)**

**Role:** the construction role may involve overseeing or coordinating property development projects.

**Responsibilities:**

* Collaborate with developers and contractors to ensure construction projects align with market demands and company goals.
* Monitor project timelines, budgets, and quality standards.
* Coordinate with relevant authorities to ensure compliance with building codes and regulations.
* Provide expertise on construction-related matters during property transactions.

**2. Letting/Letted (Includes all introduce only, management only and let only):**

**Role:** Handles the rental aspect of property transactions, liaising between landlords and tenants.

**Responsibilities:**

* Conduct property viewings and showcase rental properties to potential tenants.
* Screen and assess prospective tenants, including conducting background checks.
* Negotiate lease terms and conditions on behalf of landlords.
* Manage ongoing relationships between landlords and tenants, addressing issues and ensuring compliance with lease agreements.

**3. Sale:**

**Role:** Focuses on property sales, representing clients in buying and selling transactions.

**Responsibilities:**

* Conduct property market analyses to determine optimal pricing strategies.
* Market properties for sale through various channels, including online listings and advertising.
* Facilitate property showings, negotiate offers, and guide clients through the sales process.
* Stay informed about market trends and property values.

**4. \*\*\*Management: \*\*\*\***

**Role:** This could refer to overall business or team management.

**Responsibilities:**

* Set and monitor performance targets for sales and letting teams.
* Oversee day-to-day operations, ensuring efficient and compliant property transactions.
* Provide leadership and guidance to team members.
* Develop and implement business strategies to achieve company goals.

**5. Marketing Specialist:**

**Role:** Focuses on creating and implementing marketing strategies to promote properties.

**Responsibilities:**

* Develop and execute comprehensive marketing plans for properties.
* Create engaging content for online and offline marketing channels.
* Utilize digital marketing tools and platforms to reach target audiences.
* Analyze marketing data and adjust strategies to maximize effectiveness.

**6. Administrative Assistant/Coordinator:**

**Role:** Provides essential administrative support to ensure smooth operations.

**Responsibilities:**

* Manage paperwork and documentation related to property transactions.
* Schedule appointments, coordinate meetings, and assist with communication.
* Organize and maintain filing systems for efficient record-keeping.
* Support various teams with administrative tasks.

**7. Customer Relations Specialist:**

**Role:** Focuses on maintaining positive relationships with clients.

**Responsibilities:**

* Address client inquiries and concerns in a timely and professional manner.
* Ensure high levels of customer satisfaction through effective communication.
* Act as a liaison between clients and other departments to resolve issues.
* Gather feedback and insights to improve customer experience.

**ROLES WITH RESPECT TO ADMIN PANEL –**

* 1. **Admin Panel and Finance Roles:**
* **Admin Panel Manager:**

**Responsibilities:**

* Oversee the functionality and security of the admin panel.
* Manage user accounts and permissions for different roles within the admin panel.
* Collaborate with the IT team to implement updates and improvements.
* Ensure data accuracy and integrity within the admin panel.
* CHECK IF ALL THE PENDING TASKS/TICKETS HAVE BEEN ADDRESSED AND CLOSED ON DAILY BASIS.
* **Finance Manager:**

**Responsibilities:**

* Oversee financial transactions related to letting, sales, and property management.
* Monitor and manage budgets for different departments and projects.
* Work closely with the admin panel manager to integrate financial data into the system.
* Generate financial reports for analysis and decision-making.
  1. **Dashboard Management:**
* **Dashboard Administrator:**

**Responsibilities:**

* Design, implement, and manage the company’s dashboard system.
* Ensure real-time visibility into key performance indicators (KPIs) for letting, sales, and property management.
* Collaborate with other departments to gather data for comprehensive dashboards.
* Implement data visualization tools to enhance reporting.
* **Data Analyst:**

**Responsibilities:**

* Analyze data from the admin panel, finance, and dashboard to provide insights.
* Create comprehensive reports on letting, sale, and management performance.
* Identify trends and areas for improvement in customer and agent accounts.
* Present findings to the management team for strategic decision-making.
  1. **Main Customer Accounts (Month-wise):**

**Customer Accounts Manager:**

**Responsibilities:**

* Manage customer accounts, specifically focusing on letting, sale, and property management.
* Ensure accurate and up-to-date records of customer transactions.
* Generate monthly reports on customer accounts, detailing letted, letting, and sale figures.
* Address customer inquiries and concerns related to their accounts.

**Letted, Letting, Sale, and Management:**

* Aggregate monthly figures for letted, letting, sale, and management transactions.
* Provide a summary of the total numbers and figures for each category.
  1. **Main Agent Accounts (Month-wise):**

**Agent Accounts Manager:**

**Responsibilities:**

* Oversee agent accounts, focusing on letting, sale, and property management transactions.
* Generate monthly reports on agent performance and commissions earned.
* Collaborate with the finance manager to ensure timely and accurate payment of agent commissions.
* Provide support and training to agents regarding financial processes.

**Letted, Letting, Sale, and Management:**

* Aggregate monthly figures for letted, letting, sale, and management transactions.
* Provide a summary of the total numbers and figures for each category.

**ELEMENTS REQUIRED IN FINANCE FUNCTIONALITY-**

* 1. **Payment Processing:**
* Capability to record and track payments received from clients and tenants.
* Integration with payment gateways for online transactions.
  1. **Expense Tracking:**
* Recording and categorization of company expenses related to property management, marketing, and other operational costs.
* Integration with receipts and expense management tools.
  1. **Financial Reports:**
* Generation of financial reports, including profit and loss statements, cash flow statements, and balance sheets.
* Customizable reports for specific time periods and business segments.
  1. **Tax Management:**
* Tools for tracking and managing tax-related information.
* Integration with accounting software or tax management systems.
  1. **Commission Calculations:**
* Automated calculation of commissions for sales agents and other stakeholders.
* Customizable commission structures based on performance metrics.
  1. **Budgeting and Forecasting:**
* Budget creation and tracking for various projects, marketing campaigns, and operational expenses.
* Financial forecasting tools for predicting future revenues and expenses.
  1. **Vendor Management:**
* Tracking payments to vendors and service providers.
* Integration with supplier information and purchase orders.
  1. **Multi-Currency Support:**
* Support for transactions in multiple currencies for international deals.
* Real-time currency exchange rates.
  1. **Automation of Recurring Transactions:**

Automating recurring transactions such as rent collection, subscription fees, and service charges.

* 1. **Integration with Accounting Software:**

Seamless integration with popular accounting software for a more comprehensive financial management approach.

* 1. **Audit Trail:**

Maintaining an audit trail to track changes and user activities in the finance module.

Ensuring transparency and accountability.

* 1. **Alerts and Notifications:**

Automated alerts and notifications for upcoming payments, outstanding invoices, and other financial events.

1. **FEEDBACK**

A screenshot of a computer

Description automatically generated

**PLEASE ADD THE FEEDBACK OPTION IN THE USER MODULE (I THINK WE MISSED IT)**

**In chat bot left side if we click if we want the chat transcript we have to give the email address-**

A screenshot of a computer

Description automatically generated

A screenshot of a computer

Description automatically generated

1. **LIST OF AGREEMENTS**

**INTRODUCE ONLY**

**LET ONLY**

**MANAGEMENT**

**SALE**

* 1. **Assured Shorthold Tenancy (AST):**

**Purpose:** Most common form of tenancy in the private rental sector. Typically used for residential properties.

**Responsibilities:** Landlord is responsible for property maintenance, while the tenant is responsible for rent payments and adhering to the terms of the agreement.

**Signed Between:** Landlord and tenant.

* 1. **Non-Housing Act Tenancy:**

**Purpose:** Covers tenancies not governed by the Housing Act 1988. This can include tenancies of agricultural land and certain business tenancies.

**Responsibilities:** Terms and responsibilities are usually outlined in the tenancy agreement.

**Signed Between:** Landlord and tenant.

* 1. **Company Let Tenancy:**

**Purpose:** Involves a company renting a property for its employees. Common for corporate housing.

**Responsibilities:** Typically negotiated between the company and the landlord.

**Signed Between:** Landlord and the company or its representative.

* 1. **Excluded Tenancy and License (for lodgers):**

**Purpose:** Agreement for lodgers or individuals sharing accommodation with the landlord.

**Responsibilities:** Landlord maintains the property, lodger pays rent and adheres to agreed-upon terms.

**Signed Between:** Landlord and lodger.

* 1. **Assured and Regulated Tenancies:**

**Purpose:** Governed by the Rent Act 1977. Regulated tenancies have more security for tenants, while assured tenancies offer more flexibility.

**Responsibilities:** Outlined in the tenancy agreement, with certain statutory rights

for tenants.

**Signed Between: Landlord and tenant.**

* 1. **Non-assured Shorthold Tenancy:**

**Purpose:** Similar to AST but does not meet all the criteria required for an AST.

**Responsibilities:** Similar to an AST, with terms and responsibilities specified in the agreement.

**Signed Between:** Landlord and tenant.

* 1. **Statutory/Rolling:**

**Purpose:** Also known as a periodic tenancy, it continues on a rolling basis after the initial fixed term.

**Responsibilities:** Terms usually remain the same, and the agreement continues until either party gives notice.

**Signed Between:** Initially signed between the landlord and tenant, but it continues on a periodic basis without a new formal agreement.