

This covers the entire estate agency lettings business. From start to the finish!

## Let's look into the sales process

### Sales Front End

The process for the front end of sales is fortunately relatively similar to the front end of lettings. This is to say that in principle all of the key events map almost perfectly. Largely the only difference is in the terminologies used. For example **landlords are vendors** and **applicants refers now to buyers not tenants**.

The front end of the sales process starts with the **vendor/seller side**. The first step here is that the **prospective vendor will contact the estate agent to discuss a property they would like to put onto the market**; this will lead to a **valuation of the property**. Our CRM should be able to **automatically create valuation packs** on the **behalf of estate agents** pulling together **information found online** and **details about prices achieved for comparable properties held by the estate agent**. The **valuation pack** should be **detailed** and explain briefly the **current market situation** based on our **KPI's** and **provide a range of potential prices** suggesting a **price at which the property should go quickly** and the price which a vendor may be able to hold out for. The valuation pack should be **easy to interpret** and **include suggestions** on things the vendor could do to influence the price.

Here is how AI generated Valuation packs should look on the sales side,

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### Subject Property Details

Feature	Detail	Source
<b>Address</b>	Moore Close, Banister Park, Southampton, SO15	Zoopla Listing <a href="#">Zoopla</a>
Rightmove/ Zoopla <b>Link</b>	<a href="https://www.zoopla.co.uk/for-sale/details/69693855/?search_identifier=02e726ef4fb87319fadab9dc347081b09a45443a1158a822e690336b19cf4c88">https://www.zoopla.co.uk/for-sale/details/69693855/?search_identifier=02e726ef4fb87319fadab9dc347081b09a45443a1158a822e690336b19cf4c88</a>	Zoopla Listing <a href="#">Zoopla</a>

<b>Property Type</b>	Flat (Purpose-built apartment)	Zoopla Listing <a href="#">Zoopla</a>
<b>Bedrooms</b>	2	Zoopla Listing <a href="#">Zoopla</a>
<b>Bathrooms</b>	2 (Master En-Suite + Family Bathroom)	Zoopla Listing <a href="#">Zoopla</a>
<b>Tenure</b>	Leasehold (built c.2017; remainder NHBC)	Zoopla Listing <a href="#">Zoopla</a>
<b>Council Tax Band</b>	Band C	Zoopla Listing <a href="#">Zoopla</a>
<b>Key Selling Points</b>	Modern build (2017), low maintenance, allocated parking, balcony, two bathrooms, walking distance to city centre & Southampton Common	Zoopla Listing + local market commentary <a href="#">OnTheMarket+2</a> <a href="#">Zoopla+2</a>

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### Comparative Sales (Sold Prices)

The following recent sold prices for 2-bed, 2-bath leasehold flats in the Moore Close / Banister Park / SO15 area have been used as primary comparable evidence.

Address	Bedrooms / Bathrooms	Sold Price	Sold Date	Source
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6 Moore Close, SO15 2RS	2 bed	£210,000	19 Jan 2024	StreetCheck / OnTheMarket <a href="#">StreetCheck+2OnTheMarket+2</a>
15 Moore Close, SO15 2RS	2 bed	£250,000	15 Sep 2022	StreetCheck / OnTheMarket <a href="#">StreetCheck+1</a>
16 Moore Close, SO15 2RS	2 bed	£247,500	05 Aug 2022	StreetCheck / OnTheMarket <a href="#">StreetCheck+1</a>
1 Moore Close, SO15 2RS	2 bed	£260,000	09 Dec 2022	StreetCheck / OnTheMarket <a href="#">StreetCheck+1</a>

**Key takeaway:** The baseline recent sale for a unit very similar (6 Moore Close at £210k in Jan 2024) sets a conservative anchor. The higher values (£247k-£260k) show what the top-units have achieved in the same development/street when condition/size/lease are favourable.

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#### Active Market Comparables (Currently For Sale)

The following properties are currently listed and represent the competitive market.

Address	Bedrooms / Bathrooms	Asking Price	Key Features / Notes	Source
Moore Close, SO15	2 bed, 2 bath	£235,000	Second floor, modern build, allocated parking, balcony – similar spec. <a href="#">PrimeLocation+1</a>	

Moore Close, SO15	2 bed, 2 bath	£220,000	Fixed price, modern apartment, good presentation. <a href="#">PrimeLocation+1</a>
Nearby Archers Road, SO15	2 bed, 2 bath	£220,000	Well-presented road adjacent to Banister Park – competitive alternative. <a href="#">PrimeLocation</a>

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### Recommended Valuation and Price Range

Based on the market analysis above, we suggest marketing the property in the following range:

Price Range	Strategy
£205,000 - £215,000	Quick-sale price band — fair value to generate strong enquiry and faster exchange.
£220,000 (Guide Price)	Balanced pricing: aligns with active market and allows room for negotiation; realistic for the property given its features.
£240,000 - £250,000+	Aspirational price band — achievable only if the property is in <b>excellent</b> condition, larger size (above average for the block), lease length favourable, low charges and exemplary presentation.

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### Valuation Logic and Reasoning

- Comparable Property Analysis (Core Value)**
  - The strongest recent transaction: 6 Moore Close at £210k (Jan-24). This provides a solid foundation for value.

- Units of similar size/spec in the same development achieved £247k-£260k in 2022 — indicating upside for premium units.
- Active listings at £220k-£235k signify current market appetite.

## 2. Premium for Two Bathrooms & Condition

- The subject property's second bathroom/en-suite adds a premium relative to many flats in older blocks with one bath.
- Allocated parking + modern build (2017) boost appeal and value.

## 3. Location & Infrastructure

- Moore Close (Banister Park) is highly accessible: walking distance to city centre, good transport, leisure amenities and Southampton Common — strong locational datapoint.
- Newer build, low maintenance appeal vs older stock in SO15.

## 4. Market Conditions

- Flat/apartment markets are generally more sensitive to interest-rates and mortgage availability compared to houses — while demand remains, buyer caution can affect top bands.
- Given the flat is in a strong micro-location, the recommended guide centre price (£220k) is realistic.

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## Conclusion

The subject property is **slightly superior** to the benchmark £210k sale due to its two-bathrooms, modern build and parking. A marketing strategy centred around **£220,000** gives a realistic target with the potential to achieve offers in the **£210k-£235k** band if presentation is strong. Should the property meet all top-unit criteria (larger size, excellent condition, favourable lease & charges) then the **£240k-£250k+** range becomes plausible.

Following a successful valuation the next step is to register the details of the vendor onto the CRM if this has not been done.

Please see a list of everything the CRM needs to hold informationwise for the vendor,



## Vendor (Seller) Record: Data Fields (Exhaustive List)



### 1. Core Contact & Identity

Field	Description	Data Type / UI Element	Notes
<b>Vendor ID</b>	Unique CRM identifier	Auto-Generated Field	Internal use (links to Property and Applicant records).
<b>Vendor Type</b>	Individual / Company / Trust / Executors	Dropdown	Crucial for AML checks.
<b>Title</b>	Mr, Mrs, Ms, Dr, etc.	Dropdown	
<b>First Name</b>	Legal first name(s)	Text Field	Mandatory.
<b>Last Name</b>	Legal last name	Text Field	Mandatory.
<b>Primary Phone</b>	Best number for immediate contact	Text Field	Mandatory.
<b>Secondary Phone</b>	Home/work/mobile number	Text Field	

<b>Email Address</b>	Primary communication email	Text Field	Mandatory.
<b>Current Address</b>	Vendor's current place of residence	Address Lookup / Text Field	Mandatory for AML/KYC (Know Your Customer) and legal correspondence.
<b>Date of Birth</b>	Vendor's date of birth	Date Picker	<b>Mandatory</b> for AML/KYC compliance.
<b>Nationality</b>	Vendor's nationality	Dropdown	Required for international AML/PEP screening.
<b>Assigned Agent</b>	The staff member responsible for the relationship	Agent Dropdown	Accountability and task assignment.

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## 2. Compliance & Verification (Mandatory)

These fields are required to meet UK legal obligations, primarily **Anti-Money Laundering (AML) Regulations** and **GDPR**.

Field	Description	Data Type / UI Element	Notes
<b>AML Status</b>	Pending, Verified, Failed	Status Tag / Dropdown	<b>Crucial Compliance Status.</b>
<b>ID Document Type</b>	Passport, Driving Licence	Dropdown	Proof of Identity (POI).

<b>ID Document Upload</b>	Digital scan or photo of ID	File Upload	<b>Mandatory</b> - kept securely.
<b>Proof of Address Type</b>	Utility Bill, Bank Statement	Dropdown	Proof of Address (POA).
<b>Proof of Address Upload</b>	Digital scan of POA	File Upload	<b>Mandatory</b> - kept securely.
<b>Date AML Completed</b>	Date verification was last completed	Date Picker	Audit trail for regulatory bodies.
<b>Politically Exposed Person (PEP) Check</b>	Result of screening	Checkbox / Dropdown	Required as part of AML.
<b>Source of Funds/Wealth Declaration</b>	Vendor's written declaration	Text Field / File Upload	Best practice for AML due diligence.

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### 3. Sales Instruction & Terms

These details formalise the business relationship and are often documented in the Agency Agreement.

Field	Description	Data Type / UI Element	Notes
<b>Instructed Property</b>	Link to the specific Property Record	Search/Link Field	<b>Mandatory</b> one-to-one link.



<b>Instruction Date</b>	Date the agency agreement was signed	Date Picker	Used to calculate the contract period.
<b>Instruction Type</b>	Sole Agency, Joint Sole, Multi-Agency	Dropdown	Affects fee/marketing strategy.
<b>Contract Length (Weeks)</b>	The agreed duration of the contract	Numeric Field	
<b>Termination/Expiry Date</b>	Automatic calculation based on start date	Auto-Calculated	For proactive renewal/chasing.
<b>Agreed Commission</b>	The agreed fee structure	Numeric (%) / Text Field	e.g., 1.5% + VAT.
<b>Minimum Fee (£)</b>	Agreed minimum fee payable to the agency	Numeric (£)	Protects against a low sales price.
<b>Agency Agreement Upload</b>	Scanned copy of the signed contract	File Upload	<b>Mandatory</b> for audit.

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#### 4. Relationship & Notes

Field	Description	Data Type / UI Element	Notes

<b>Relationship Status</b>	New Lead, Valuation Booked, Instructed, Sold, Completed, Past Client, Lost	Status Tag / Dropdown	Tracks engagement pipeline.
<b>Source of Lead</b>	Portal, Referral, Board, Past Client	Dropdown	For marketing ROI tracking.
<b>Marketing Consent</b>	Opt-in for future marketing materials	Checkbox (GDPR)	<b>Mandatory</b> explicit consent (e.g., 'Do you wish to receive future market updates?').
<b>Vendor Notes</b>	Important personal or property-related notes	Multi-line Text	Internal agent notes (e.g., 'Only call after 6 pm,' 'Works abroad often').
<b>Conveyancer Link</b>	Link to the Vendor's Conveyancer/Solicitor record	Search/Link Field	Crucial for Sales Progression.





## User Interface (UI) Mock-up: Vendor Record

This suggested layout prioritises **compliance status** and **key communication details at the top**, ensuring the **agent never overlooks mandatory checks**.

### Vendor: Johnathan Smith

<b>Status &amp; Compliance</b>	<b>Contact &amp; Identity</b>
<b>Current Status: Instructed</b> (Linked to 1 Property)	<b>Agent:</b> Sarah Davies (ext. 402)

<b>AML Verification:</b>  <b>Verified</b> (Completed 15/10/2025)	<b>Primary Phone:</b> 07700 900800
<b>ID Upload:</b>  <b>2 Docs Uploaded</b>	<b>Email:</b> johnathan.smith@email.com
<b>Instruction Date:</b> 01/10/2025	<b>Address:</b> 12 The Mews, Eastville, ES1 2AB
<b>Contract Expiry:</b> 01/01/2026 (12 Weeks)	<b>Date of Birth:</b> 10/04/1975

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**Sales Instruction & Terms**

Instruction Type	Agreed Commission	Property	Conveyancer
<b>Sole Agency</b>	1.8% + VAT (Min. £3,500)	<b>14 Willow Road, Eastville, ES1 2AA</b>	<b>Taylor &amp; Co Solicitors</b>
<b>Contract Docs:</b> [View Signed Agreement] [View Proof of ID/POA]	<b>AML Docs:</b> [View AML Check Report] [View PEP Screen]	<b>View Property Record »</b>	<b>View Conveyancer Contact »</b>

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**Activity History & Marketing**

- **15/10/2025:** AML/ID verified and marked as compliant.
- **01/10/2025:** Signed Sole Agency Agreement. Commission 1.8% + VAT.
- **25/09/2025:** Valuation conducted by Agent Sarah Davies.
- **01/01/2024:** Marketing Opt-In: **Yes** (Receives Monthly Market Updates).
- **Internal Notes:** Prefers email contact for routine updates. Mention his dog, 'Buddy,' if calling home.

**PRIME LETTINGS CRM** Search Sarah Johnson

**AML & ID VERIFICATION: VERIFIED**

**VENDOR RECORD**

**Johnathan Smith** Instructed

Assigned Agent: Sarah Davies

New Task Send Email Log Call

Contact & Instruction (Active) View Linked Property

Contact Details Compliance & Documentation Timeline & Activity

**Personal Details**

First Name  
Last Name  
Date of Birth

**Primary Phone**

Secondary Phone  
Email Address

**Agreed Commission (%)**

Emad Phede  
Minimum Fee (£)

**Instruction Details**

[14 Willow Road, Eastville, ES1 2AA](#)

**Instruction Date**

Sole Agency

Instruction Type: Sole Agency  
Contract Length: (Weeks)  
Expiry Date

**Financial Terms**

1.8 1.8% + VAT  
Agreed Commission (Text)  
Minimum Fee

Here is a moc UI that explains how this could look in the end.

Much like at the front end of the lettings process. It is often the case that applicants need multiple viewings before deciding and finalising on a property. To be a successful sales agent you need to therefore understand what your buyers are looking for. This means registration is crucial and **asking the right questions** to understand your buyers needs is a vital job which the CRM can and should automate in a similar fashion. Here are some key buyer **registration questions** that can help estate agents learn about their clients and find more people the right properties faster.

Have you got an ideal timeframe for moving?

What's prompting the move?

What price are you looking up to?

What condition are you looking for done up or are you willing to take on more of a project?

What tenure are you looking for, leaseholds or freeholds?

Have you got a property to sell before buying?

If yes then is your current property already on the market or under offer?

Are you a first time buyer?

Have you got a mortgage in principle or will this be a cash purchase?

Are there any other key criteria such as being near certain schools or parking?

Correctly implementing an automated call back agent for the sales side would be very impressive - this is often more technical than the registration of tenants because there are more technicalities like how the property will be paid for if there will be a chain etc that these questions try to get to the bottom of.

The details of the phone call should be automatically transcribed to the CRM. And used to send automatic matches to that applicant.

Sending automatic property matches is important as this is a huge time drain on estate agents. A big part of the job is making people aware of properties coming onto the market and drumming up interest to arrange viewings and open houses which get stock sold!

Currently much like letting agents estate agents on the sales side spend hours matching properties each week manually sending emails manually dialling potential clients. This should all be automated and clients should be reached out automatically and personally via email and text with the potential for viewings being booked in automatically based on negotiators availability.

Automatic property matches should be personalised to the specific applicant based off of the registration questions such as if the applicant mentions on registration that they are a young family the automatic email/text should mention something like Only a 5 minute walk to X primary school!!! (should this be true of course).

In terms of producing the applicant card where the data and information for the prospective buyer is stored the information that is required to be easily accessed/inputted is as follows.

## TOP-LEVEL OBJECTS & RELATIONSHIPS

- **Buyer (primary object)** — main record
- **Contacts** — allow linked contacts (partner, financial contact, solicitor, broker)
- **Linked Properties** — matched properties, previously viewed properties, saved favourites
- **Offers** — list of offers made by this buyer (linked)
- **Viewings** — scheduled and completed viewings
- **Documents** — uploads (AIP, Proof of Funds, ID)
- **Activity Log** — calls, emails, notes, tasks
- **Pipeline / Sales Stage** — e.g., Registered → Viewing → Interested → Offer → Offer Accepted → Exchanged → Completed
- **Alerts / Saved Searches** — user-configurable criteria and alerts per buyer (matching engine)  
(These relationships are standard in purpose-built CRMs and implied by features in Reapit/Alto/Jupix). [reapit.com](https://reapit.com)+1

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## 1) CORE IDENTIFIERS & ADMIN

- **Buyer ID** — system auto-generated (string) – unique.
- **Record created / last updated / created by / last updated by** — timestamps & user IDs (audit).
- **Status / Stage** — enum: Registered, Active, Dormant, Hot/Warm/Cold, Archived.

- **Source** — enum/text: Portal (Rightmove/Zoopla), Branch Walk-In, Referral, Social, Advertising (store lead source).
    - *Why*: Conversion analytics & lead source ROI.
  - **Tags / Labels** — free tags for segmentation (e.g., “First-time buyer”, “Investor”, “Relocation”).  
*Dev note*: index tags for fast search.
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## 2) CONTACT & IDENTITY

- **Primary contact name** (first / last) — required.
- **Title / Preferred name** — optional.
- **Alternate contacts** — partner, parent, guarantor (each as contact sub-record with relationship type).
- **Phone(s)** — primary, mobile, secondary (with call/SMS capability).
- **Email(s)** — primary, secondary (validated).
- **Preferred contact method & time** — enum.
- **Current correspondence address** — with postcode lookup (autocomplete).
- **Current property status** — Renting / Owner / Living with family / Vacant (helps chain logic).
- **Nationality / DOB (optional, for AML/identity)** — only if required and with privacy handling.

**Why**: basic contacting, AML and chain assessment.

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## 3) FINANCIAL & AFFORDABILITY (CRITICAL)

- **Budget Range (min / max)** — numeric.
- **Maximum spend / Flexibility** — numeric + boolean (negotiable).
- **Buyer type** — Cash / Mortgage / Part-exchange / Shared ownership / Help to Buy.
- **Agreement in Principle (AIP)** — boolean + upload (PDF) + AIP amount + lender name + AIP date.
- **Proof of Funds** — upload(s), type (savings/sale/gift), amount, verified boolean and verifier.
- **Deposit source** — savings / sale of property / equity release / gift (string).
- **Monthly household income** — number (optional) and employment status.
- **Mortgage broker details** — link to broker contact (name, firm, phone, email).
- **Affordability notes** — text (any special financial arrangements).
- **AML / KYC status** — enum: Not checked / In progress / Verified / Failed; link to verification provider result (Thirdfort, Credas, etc.).
  - *Why:* Reapit and other CRMs emphasise AML & verification workflows; capture result and date. [reapit.com](https://reapit.com)

**Validation / UX:** require either AIP or Proof of Funds for “Hot” buyer classification. Allow document expiry reminders (AIP expires).

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## 4) BUYER STATUS & READINESS

- **Buying Timeline / Desired Move Date** — date or relative text (ASAP / 1–3 months / 3–6 months / 6+ months).
- **Readiness level** — Hot / Warm / Cold (agent-assigned).
- **Has property to sell?** — boolean + link to vendor property record if same agency.
- **Is there a chain?** — text description / chain id (link).



- **Solicitor / Conveyancer details** — name, firm, phone, email (optional).
- **Decision maker(s)** — who signs / approves (contact link).
- **Commitment level** — willing to offer, needs mortgage, viewing only (enum/notes).

**Why:** prioritisation & scheduling.

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## 5) SEARCH CRITERIA (structured & searchable)

- **Primary Locations (list)** — each with radius (e.g., Southampton, 2 miles).
- **Secondary Areas** — list.
- **Property Type** — Flat / Terraced / Semi / Detached / Bungalow / New Build / Conversion.
- **Bedrooms** — min / preferred / max.
- **Bathrooms** — min.
- **Outdoor Space** — Garden / Balcony / None.
- **Parking** — Essential / Nice to have / Not needed.
- **Accessibility / Special needs** — step-free access / lift / wheelchair access.
- **Tenure Preference** — Freehold / Leasehold / No preference (for flats).
- **Age / Condition Preference** — New build / Modern / Period / Renovation acceptable.
- **Key Features required** — checkboxes: Ensuite, Energy performance, EPC rating, Home office, Open-plan kitchen, Floorplan size, Garage.
- **School catchment importance** — boolean + school names (string).
- **Commute criteria** — maximum commute time or station name.
- **Minimum property size** — sqft or sqm numeric.

- **Budget flexibility note** — text.

**Why:** drives matching / saved search engine and alerts (many CRMs include matching features). [reapit.com+1](#)

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## 6) MATCHING & ALERTS

- **Saved searches** — saved filter criteria + name + last-run timestamp.
- **Auto-match score / match history** — calculated score for each linked property (show top N matches).
- **Alert preferences** — frequency (instant/daily/weekly), channel (email/sms).
- **Excluded properties** — list of any properties buyer rejects (helps re-filter).

**Why:** automated lead-to-property matching is core CRM functionality (Reapit & Alto emphasise prospecting & matching tools). [Alto Software+1](#)

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## 7) VIEWINGS & INTERACTIONS

- **Viewing availability** — days/times (structured).
- **Viewing type preference** — in-person / virtual / both.
- **Viewings scheduled** — table: property, date/time, attending (contacts), outcome, feedback.
- **Viewing feedback history** — aggregated notes and scoring (likes/dislikes).
- **Property tour history** — which properties viewed, dates, duration, agent performing.
- **Virtual tour links watched** — boolean + watch timestamp.

**Why:** match user journey and close faster; agents need to see what buyer has seen and thought.

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## 8) OFFERS & NEGOTIATION

- **Offers made** — table with property id, offer amount, date, conditions (subject to), expiry, status (pending/accepted/rejected).
- **Offer source** — direct / via broker / online portal.
- **Price flexibility** — numeric / percent buffer (willing to go X% above budget).
- **Preferred negotiation style** — “lowest cash offer”, “sealed offers”, “open negotiation” (agent notes).
- **Offer approvals** — who is authorised to accept (contact).
- **Offer documents** — uploaded proof of funds, lender communication.

**Why:** keep audit trail & status for compliance and progression.

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## 9) DOCUMENTS & UPLOADS (DOCUMENT MANAGEMENT)

- **Identity docs** — passport / driving licence (uploads with expiry metadata).
- **Proof of funds / bank statements** — uploads + verified flag.
- **AIP / mortgage offer** — upload + expiry.
- **Proof of address** — utility/council tax (uploads).
- **Other supporting docs** — power of attorney, company docs (if buying via company).
- **Document expiry reminders** — automated notifications for timebound docs.

**Security note:** store sensitive docs encrypted, with role-based access and retention policies per GDPR.

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## 10) COMMUNICATIONS & ACTIVITY

- **Activity timeline** — chronological feed (calls, emails, SMS, notes). Auto-log email threads and integrate with calendar.
- **Templates used** — record which email templates have been sent (valuation, follow-up, legal info).
- **Agent assignments** — primary agent, negotiator, viewing agent.
- **Tasks & Reminders** — follow-ups, AIP expiry checks, viewing confirmations.
- **Call recordings / notes** — text summary + optional recording link.

**Why:** visibility and auditability of all contact, and automation of follow-ups (common in Alto & Reapit). [Alto Software+1](#)

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## 11) GDPR / CONSENTS / PERMISSIONS

- **Marketing consents** — email/sms/phone (with timestamp & method of collection).
- **Third-party sharing consent** — boolean + timestamp.
- **Data retention expiry** — auto-calc based on consent/policy.
- **Right to Erasure / Data Access requests** — logged with status.
- **Communication opt-outs** — boolean flags.

**Why:** legal requirement; provide UI to capture and display consent for agents. (Reapit docs emphasise compliance features.) [reapit.com](#)

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## 12) REPORTING / KPIs ON THE CARD

- **Buyer score / likelihood to convert** — composite score (AIP, readiness, viewing count).

- **Time registered** — days since registration.
  - **Number of viewings / offers / matches** — quick stats.
  - **Last contact date** — quick glance.  
(Useful for dashboards and prioritisation features.)
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## 13) BACKEND / TECH & INTEGRATION NOTES (for developers)

- **APIs & Portal Feeds:** store portal reference IDs (Rightmove, Zoopla) for any leads & link to listing IDs. (Alto/others provide portal integration.) [Alto Software](#)
  - **Webhooks:** push new property matches & viewings to buyer notifications.
  - **Document store:** S3-style file store with metadata (type, uploadedBy, verifiedBy, expiry).
  - **Search & Filters:** full-text search on notes + indexed fields for location, budget, tags.
  - **Custom fields:** allow agency-specific fields; store as key/value pairs.
  - **Security:** encrypt PII at rest, RBAC for sensitive docs, audit logging for all edits.
  - **AML Integration:** option to call external AML providers and persist results (Reapit/Alto integrations are common). [reapit.com+1](#)
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## 14) UI / UX Recommendations (developer-friendly)

- **Tabbed form:** Buyer Details / Financials / Search Criteria / Viewings / Offers / Documents / Activity / GDPR. (Matches modern CRM UI patterns used by Alto/Reapit.) [Alto Software+1](#)
- **Progress / completeness bar:** show % of mandatory fields completed (AIP/docs etc.).

- **Smart validation:** e.g., if buyer says “cash” then AIP not required but Proof of Funds required.
  - **Quick-Qualify button:** sets buyer to Hot when AIP + Proof of Funds present.
  - **Inline tooltips:** explain why each financial field is asked (for non-agent developers to understand context).
  - **Activity feed cards:** allow filtering by type (calls, emails, viewings) and quick action shortcuts (create viewing, send email).
  - **Mobile responsive:** essential for on-the-road agents to capture info during viewings.
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## 15) Example Minimal Required Fields to Record at Registration (quick checklist)

1. Full name, primary phone, primary email (contact)
2. Budget range and max price (affordability)
3. Buying position (AIP/cash/needs mortgage)
4. Desired locations and property type (search criteria)
5. Intended move date (timing)
6. Has property to sell? (chain)
7. Preferred contact method / viewing availability
8. Consent to contact (GDPR)
9. Source (portal/referral)
10. Assigned agent (internal)


These are the minimum required to have a functional buyer record and begin automated matching and outreach.

In the end I envision this looking something like this on the estate agents side,

## Buyer

Save

DetailsFinancialsSearch CriteriaViewingsOffersActivityHot



**Isabelia Hughes**

...

ID #45678

07783 225443

isabella.hughes@example.com

Current address

23 Greenacre, Southampton, SQ32 5TW

Sale by

15 Feb 2024

Buyer type

First-time buyer

**Key criteria**

Budget range

£280,000 – £320,000

Intended move date

As soon as possible

**Notes**

Prefers a property with a spacious garden and good school catchment.

**Key name**

House, Semi-detached

Wanted locations

Central Southampton, Shirley

Bedrooms

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Now we have covered the front end of sales we need to have systems in place to manage the back end of the sales process. This involves everything from the stage at which the offer is accepted to the stage at which contracts are exchanged. This is one of the most technically challenging parts of estate agency because emotions are high fall throughs are up to 20% of properties and the process is often long drawn out and complex with long chains and lots of independent parties weighing in on the deal trying to renegotiate etc.

The job of sales progression is often managed by dedicated sales progressors and it is my view that this process is harder to automate because the number of edge cases likely exceeds any standards.

Please see a comprehensive list of the back end sales process and what the CRM should do to track this process (at this fiddly stage of the process the CRMs main job should be as a virtual check list and reminding agent.).