Veco User Guides –

Quick Forms

Introduction

The "Veco" system is designed to store a vast amount of information about contacts and properties. The principle being that a "Contact" is a person or company with whom you are doing business, and a "Property" is an individual building or unit within a block.

A contact could be an Applicant (Lettings or Sales); Owner (Landlord or Leaseholder or Vendor); Tenant, Supplier, or a related individual or company (Guarantor, Employer, Solicitor, etc).

A property could be managed (has a tenancy); available to let; for sale; available at an auction; or managed as a unit in a block.

Over time (maybe years), the nature of the business with a contact or property may change. For example, a contact could be an applicant looking to purchase a property and after purchase will become an owner. As the owner of the property the contact may wish you to let and subsequently manage the property on his/her behalf.

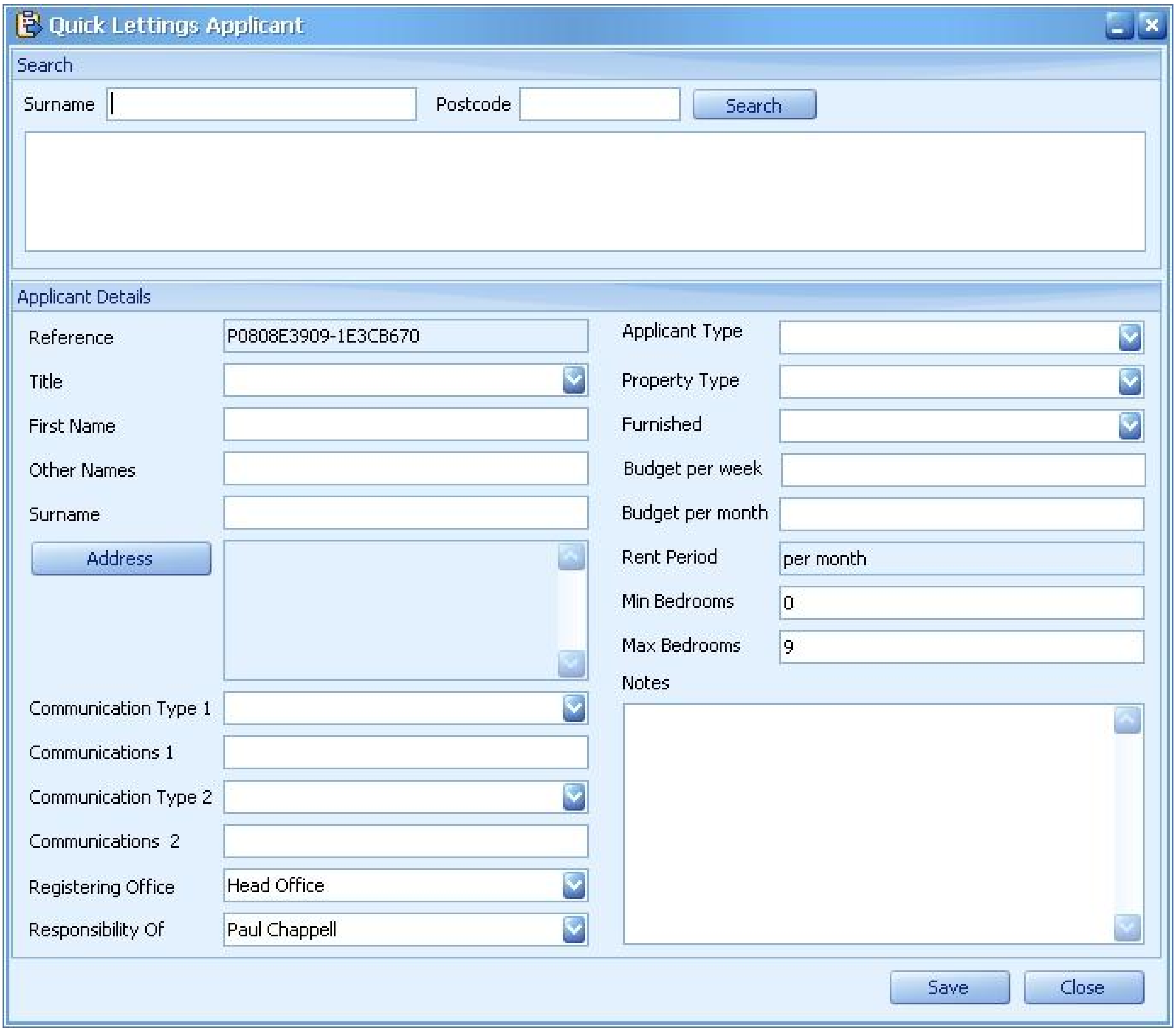
As you may appreciate, a large amount of valuable information will build up about each contact and each property - the "Veco" system is designed such that you may never need to delete any contact or property – and the full information is always immediately available from the main contact and property forms.

Although the main contact and property forms can be used to enter this vast amount of information from scratch, it is sometimes preferable to quickly enter the briefest of new details. This is why we have included a variety of "Quick" data entry options.

- Quick Lettings Applicant
- Quick Sales Applicant
- Quick Contact
- Quick Property
- Quick Owner & Property
- Quick Property Key Log
- Quick Estate Key Log

The above "Quick" options are available as nodes on the tree menu.

Quick Lettings Applicant



This option is used to quickly register a new contact that is looking for a property to rent.

The form is divided into two sections: “Search” and “Applicant Details”

The “Search” section is used to establish if the contact being registered has already been recorded in the “Veco” database because your company has had previous dealings with the person (in any capacity):

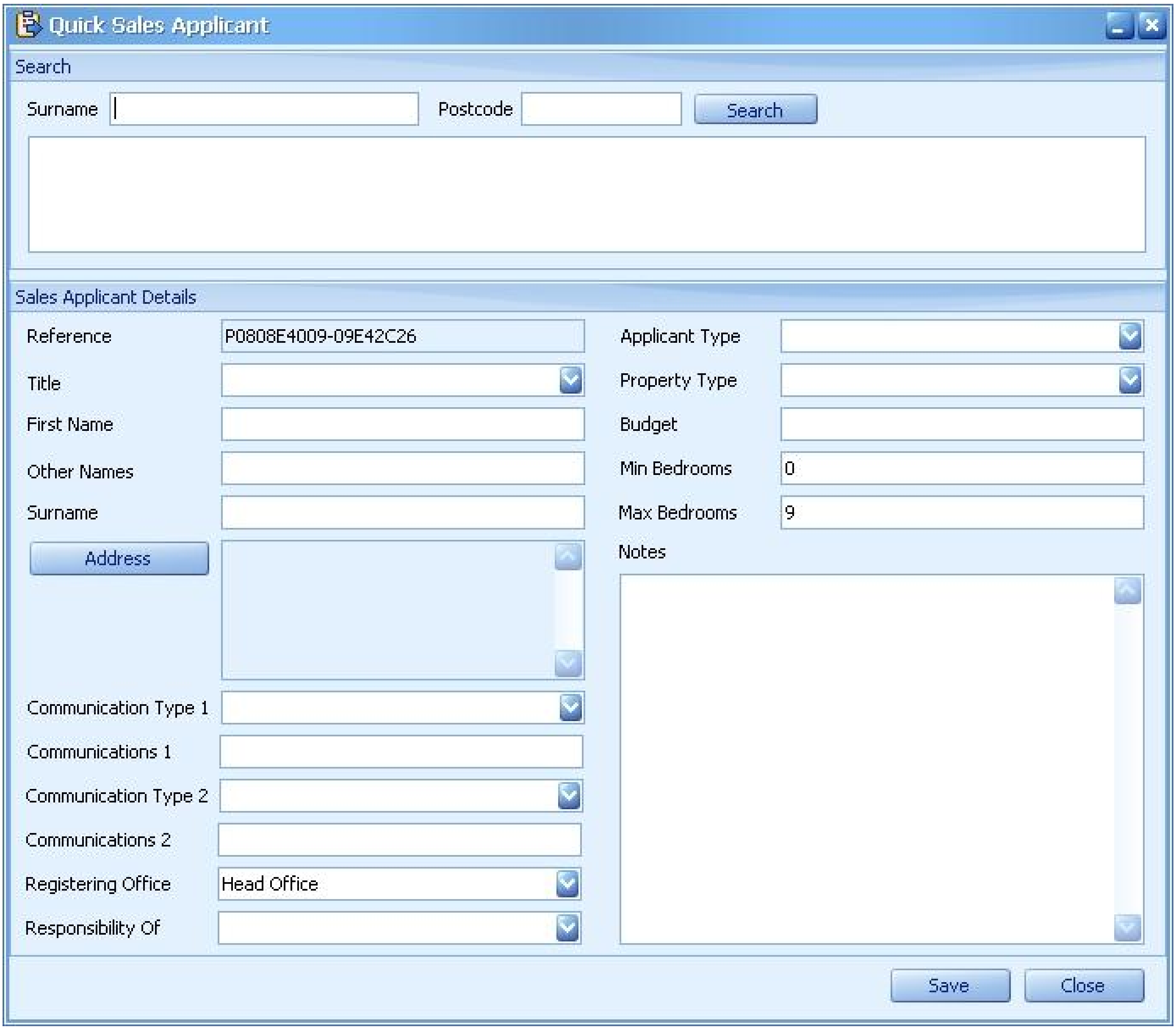
1. Enter the full applicant’s surname and (optionally) their postcode
2. Click “Search”
3. The area below will show a list of existing contacts that match the surname and/or postcode
4. Establish if the contact is already recorded, and double-click the name for further details

If the contact does not already exist, use the “Applicant Details” section to enter new information about the contact:

5. If requested, enter the first part of a reference for the new applicant

6. Complete the name
7. Optionally, enter the applicant’s address
8. Enter one or two methods of contacting the applicant (further contact methods can be added later)
9. Complete the form by specifying the type of property required
10. Click “Save”
11. Two new button will now be displayed allowing a list of “Suitable Properties” that match the applicant’s requirement to be shown
12. If required at this stage, the full contact details form can be opened to allow the recording of further information

Quick Sales Applicant



This option is used to quickly register a new contact that is looking to purchase a property.

The form is divided into two sections: “Search” and “Applicant Details”

The “Search” section is used to establish if the contact being registered has already been recorded in the “Veco” database because your company has had previous dealings with the person (in any capacity):

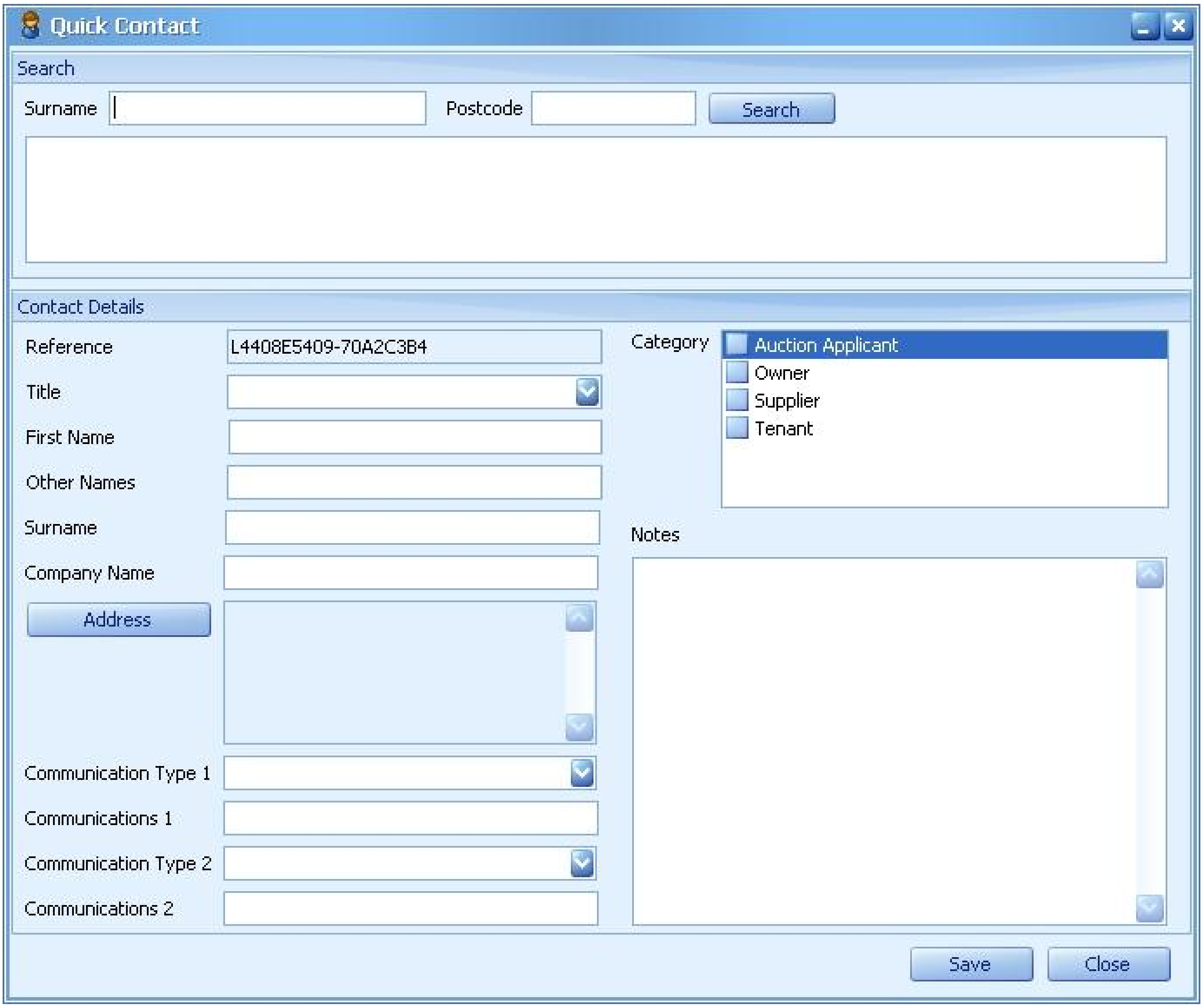
1. Enter the full applicant’s surname and (optionally) their postcode
2. Click “Search”
3. The area below will show a list of existing contacts that match the surname and/or postcode
4. Establish if the contact is already recorded, and double-click the name for further details

If the contact does not already exist, use the “Applicant Details” section to enter new information about the contact:

5. If requested, enter the first part of a reference for the new applicant

6. Complete the name
7. Optionally, enter the applicant's address
8. Enter one or two methods of contacting the applicant (further contact methods can be added later)
9. Complete the form by specifying the type of property required
10. Click "Save"
11. Two new button will now be displayed allowing a list of "Suitable Properties" that match the applicant's requirement to be shown
12. If required at this stage, the full contact details form can be opened to allow the recording of further information

Quick Contact



This option is used to quickly register a new contact. This contact could be an applicant, owner, supplier, tenant, or any other person or company you deal with in any capacity/

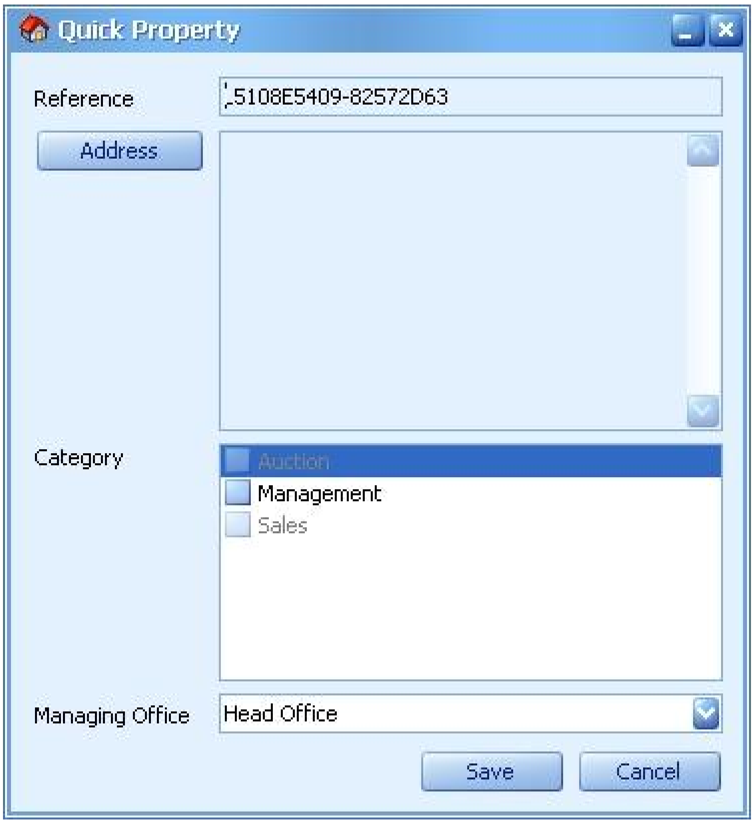
The form is divided into two sections: "Search" and "Contact Details"

The "Search" section is used to establish if the contact being registered has already been recorded in the "Veco" database because your company has had previous dealings with the person (in any capacity):

1. Enter the full contact's surname and (optionally) their postcode
2. Click "Search"
3. The area below will show a list of existing contacts that match the surname and/or postcode
4. Establish if the contact is already recorded, and double-click the name for further details
5. If the contact does not already exist, use the "Contact Details" section to enter new information about the contact:
6. If requested, enter the first part of a reference for the new contact
7. Complete the name

8. Optionally, enter the contact's address
9. Enter one or two methods of contacting the contact (further contact methods can be added later)
10. Choose a category of contact from the list, or do no tick any category if the contact should be marked as "General".
11. Click "Save"
12. If required at this stage, the full contact details form can be opened to allow the recording of further information

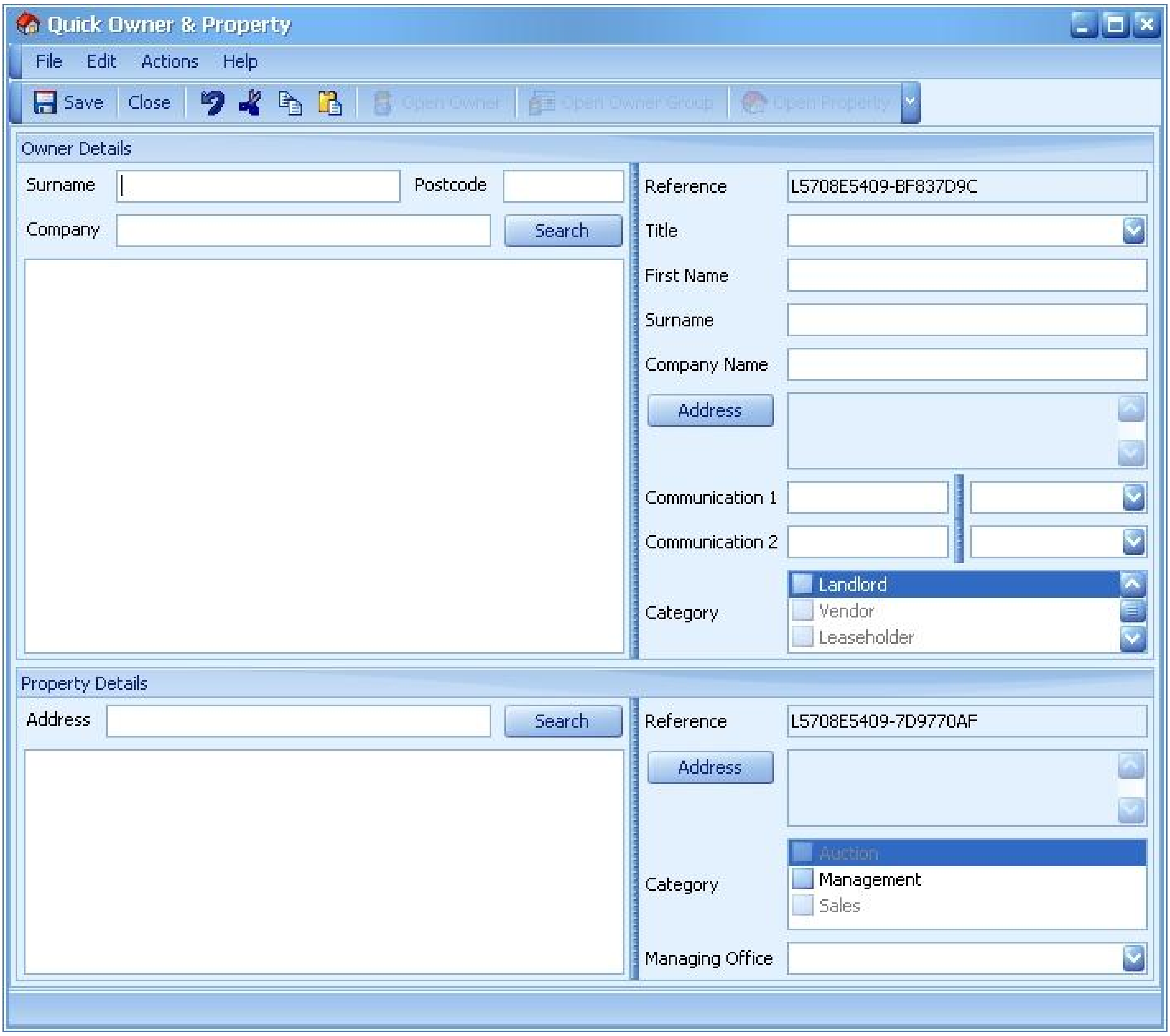
Quick Property



This option is used to quickly register a new property.

1. If requested, enter the first part of the property reference
2. Click “Address”
3. Enter the property address or use the postcode search facility to establish if the property is already registered
4. Select a category for the property:
   - “Auction” if the property is to be entered into a property auction
   - “Management” if the property is to be offer for let or is currently being managed
   - “Sales” if the property is available for sale
5. Select a managing office. This is the office that will be managing the let, or sale.
6. Click “Save”
7. If required at this stage, the full contact details form can be opened to allow the recording of further information

Quick Owner & Property



This option is used to quickly register a new Owner and Property, together with an Owner Group. This option should only be used if the owner and property have not been previously registered.

The form is divided into two sections: “Owner Details” and “Property Details”

The “Search” facility on each section is used to establish if the owner or the property has been previous registered

1. Enter the full owner’s surname and (optionally) their postcode
2. Click “Search”
3. The area below will show a list of existing contacts that match the surname and/or postcode
4. Establish if the contact is already recorded, and double-click the name for further details

5. If the owner does not already exist, enter the new details. This is only very brief information. Further information can be entered later on the full owner form.

6. Ensure a category of owner is selected:

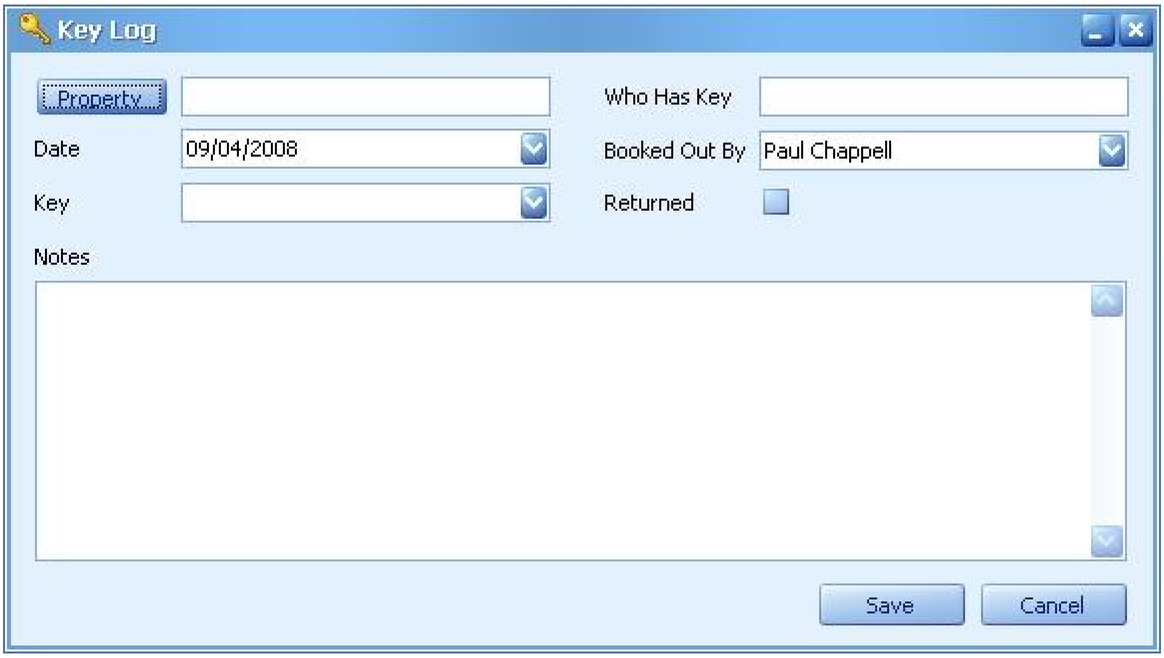
    1. “Landlord” – the owner’s property is to be let or managed

    2. “Vendor” – the owner’s property is to be put on the market for sale

    3. “Leaseholder” – The owner’s property (normally an apartment) is part of an estate that is managed

7. Click “Save” or “Close”

Quick Property Key Log



This option is used to record a property's key being booked out to another agent or contractor.

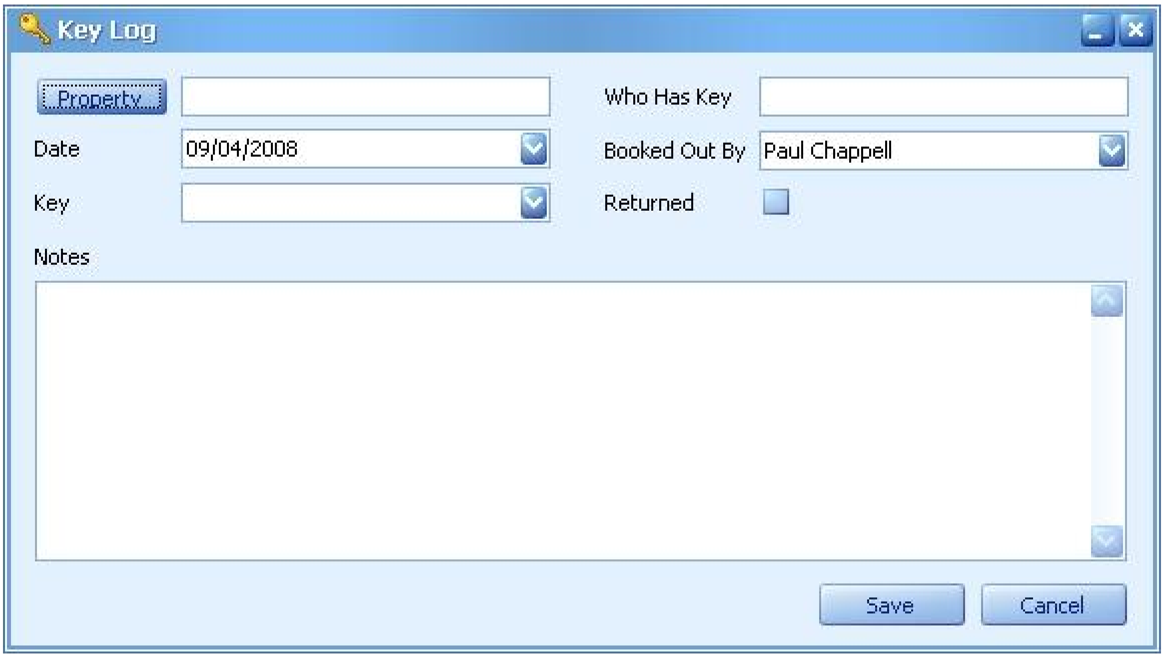
1. Click "Property" and find the relevant property. Double-click from the list to select the correct property.
2. Select the type of key from the options
3. Specify the name of the person who has been given the key
4. Enter any notes
5. Click "Save"

Details of keys that have yet to be returned are shown on the "Key Log" node from the "Property/Units" option on the tree menu, or on the "Security" tab of the individual property details form.

To record that a key has been returned:

1. Double-click the relevant key from the "Key Log"
2. Tick "Returned"
3. Enter any notes as required
4. Click "Save"

Quick Estate Key Log



This option is used to record an estate's key being booked out to another agent or contractor.

6. Click “Estate” and find the relevant estate. Double-click from the list to select the correct estate.
7. Select the type of key from the options
8. Specify the name of the person who has been given the key
9. Enter any notes
10. Click “Save”

Details of keys that have yet to be returned are shown on the “Key Log” node from the “Estates” option on the tree menu, or on the “Security” tab of the individual estate details form.

To record that a key has been returned:

5. Double-click the relevant key from the “Key Log”
6. Tick “Returned”
7. Enter any notes as required
8. Click “Save”