Set Up Form

agentOS

Company Information

Registered Company Name	
Registration Number	
Registration Country	
Marketing Name	

VAT Number		Data Protection No.	
NRL Number		NRL Payment Ref.	
Deposit Scheme(s)		Deposit Scheme ID	

Branch Details

(if applicable)

Branch 1 Name		Branch 2 Name	
Address		Address	
Postcode		Postcode	
Branch Telephone No.		Branch Telephone No.	
Branch Email Address		Branch Email Address	
Branch Website		Branch Website	

Weekday Opening Hours		Weekday Opening Hours	
Weekend Opening Hours		Weekend Opening Hours	

Bank Details

Client or Lettings Account		**Trading or Office Account**	
Account Name		Account Name	
Sort Code		Sort Code	
Account Number		Account Number	
Bank name		Bank name	
Address		Address	
Postcode		Postcode	

Additional Account 1	*(if applicable)*	**Additional Account 2**	*(if applicable)*
Account Name		Account Name	
Sort Code		Sort Code	
Account Number		Account Number	
Bank name		Bank name	
Address		Address	
Postcode		Postcode	

Set Up Form

Questionnaire

How many properties do you manage or collect rent for?	
How many unmanaged properties do you currently have?	
Do you hold maintenance floats for your landlords?	
Do you operate any rent guarantee services?	

User Login Details

Main Contact Name*	
Main Contact Job Title*	
Main Contact Email Address*	
Main Contact Direct Telephone Number (if applicable)*	

Name	
Job Title	
Email Address	
Direct Telephone Number (if applicable)	

Name	
Job Title	
Email Address	
Direct Telephone Number (if applicable)	

Name	
Job Title	
Email Address	
Direct Telephone Number (if applicable)	

Name	
Job Title	
Email Address	
Direct Telephone Number (if applicable)	

*Your main contact profile will be set to the highest access level, all other logins will be set up with basic assess to begin with. The main contact will be able to raise other staff access levels on agentOS as required

Sales Progression Checklist

If you would like a Sales Progression Checklist added to agentOS, please enter it below. Each Item needs to be allocated to one of the below stages:

1. Instructed - Not On Market
2. Market Appraisal
3. Lost Appraisal
4. Advertised - On Market
5. Under Offer

6. Contracts Exchanged
7. Sold
8. Fallen Through
9. Withdrawn

Checklist Item
E.g.
Appraisal completed
Floor Plans

Stage to Apply Item

Market Appraisal
Instructed

Office: 8th floor, Capital tower, Greyfriars Rd, Cardiff, CF10 3AG
Company Reg: 05409547 (England & Wales) tel: 02920 367960 email: support@agentos.com
Website: www.agentos.com

Additional Information

Please call agentOS Integration on 02920 367967 or 02920 367963 for help completing this form.
Once complete email to integration@agentos.com