FEB 2025 REFERRAL PORTAL UPDATE

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1. INTRODUCTION

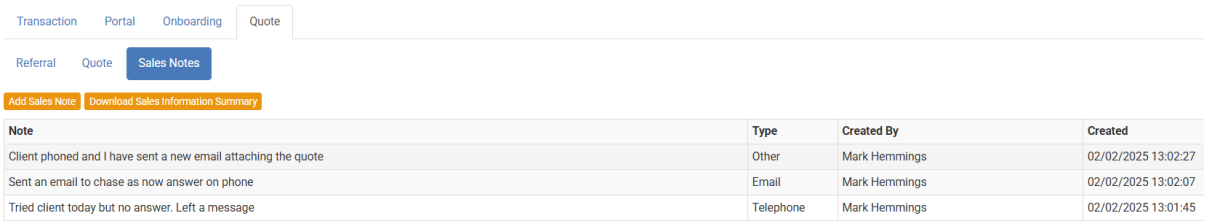
We have deployed weekend of 1st/2nd February that now enables you to Download Special Instructions & Sales Notes. These have been combined to ease the process described below.

We have also updated the user selections that have been a mix of name and/or email address. These are now consistent to show the name followed by email address.

2. SALES NOTES & SPECIAL INSTRUCTIONS

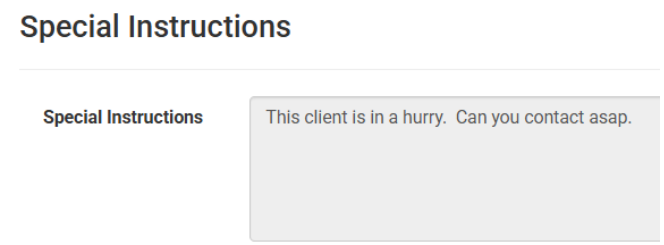
There is now an option to Sales Notes from the "Sales Notes" tab in the Quote Menu of the system. When performing this action, the PDF generated will also give you the "Special Instructions" that are entered at the Referral screen.

Note the "Sales Notes" on this example (there are 3):-

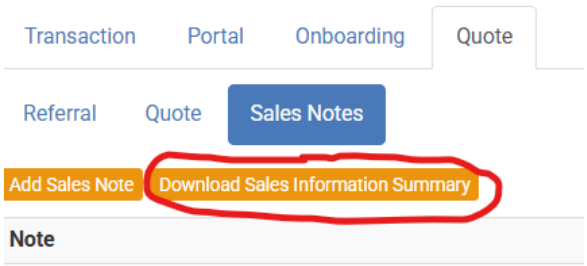


Note	Type	Created By	Created
Client phoned and I have sent a new email attaching the quote	Other	Mark Hemmings	02/02/2025 13:02:27
Sent an email to chase as now answer on phone	Email	Mark Hemmings	02/02/2025 13:02:07
Tried client today but no answer. Left a message	Telephone	Mark Hemmings	02/02/2025 13:01:45

Note the "Special Instructions" on this example transaction:-



A new button now exists named :- "Download Sales Information Summary" as shown below:-



If you Click the button, you will see that a PDF is created and saved to your Download folder.

Note the screen image next that shows the standard form layout:-

Referral Details

Referral Id	1192926
Name	Harry Hemmings
Email	harry.h+greg1@lawfirmservices.co.uk
Transaction Type	Purchase
Transaction Description	Purchase of (J Jenkins), Knockglass, Skelbo, Dornoch, IV25 3QF

Special Instructions

This client is in a hurry. Can you contact asap.

Sales Notes

Note	Type	Created By	Created
Client phoned and I have sent a new email attaching the quote	Other	Mark Hemmings	02/02/25 13:02
Sent an email to chase as now answer on phone	Email	Mark Hemmings	02/02/25 13:02
Tried client today but no answer. Left a message	Telephone	Mark Hemmings	02/02/25 13:01

Noting that both Sales Notes and Special Instructions are merged to the PDF

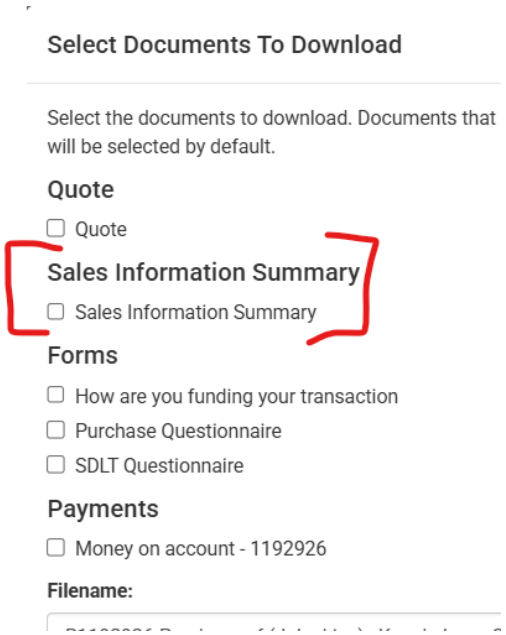
3. SALES NOTES & SPECIAL INSTRUCTIONS - DOWNLOAD

The sales notes and Special Instructions can also be downloaded from the Portal Tabs as follows:-

Click PORTAL

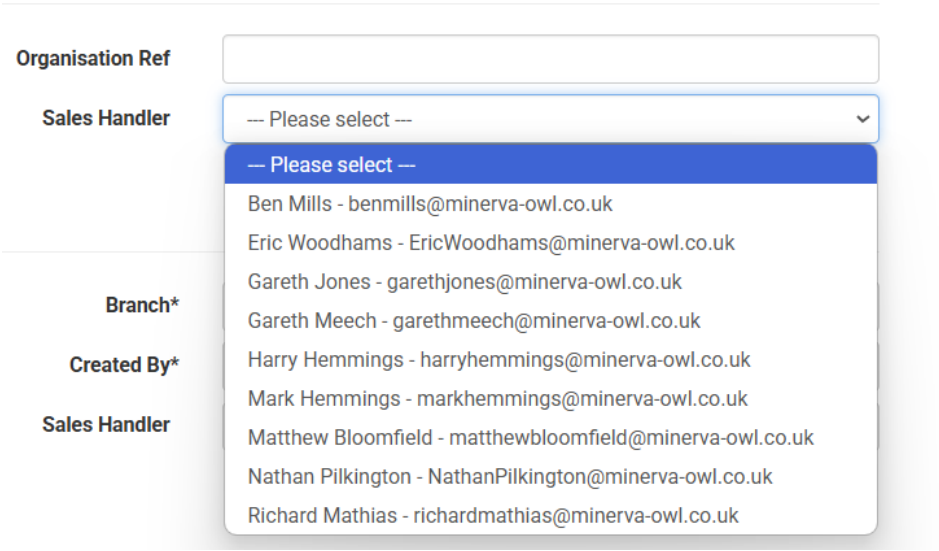
Click DOWNLOAD ALL

You will now see the option to Download Sales Notes and Special Instructions as follows:-



4. REFERRAL SCREEN – USERNAMES

We had some inconsistencies where you picked a name such as Sales Handler, Create By etc and so these have now been made to display the Name followed by persons email address as shown below:-



5. OTHER UPDATES

There has also been a fix to display the icon of the:-

Cloud – this is a portal Matter

Asterisk – this matter has been panelled (if filled in) or not panelled (not filled in)!

And a column selector for:-

Organisation Ref – This has been added back into the Standard/default grid layout

END