

House Sales Administration

**MERCHANT
SOFTWARE
LIMITED**

The Merchant Software Limited House Sales system is quick to install, suitable for both Local Authorities and Housing Associations and provides the following features :

- Easy to Use and Legislation Compliant
- Provides a central database for all Application related data.
- Tracks applications from initial entry to completion or withdrawal.
- Discount and Sale Price automatically calculated (all schemes)
- Automated Document Production (100+ different documents)
- Service Charge Estimate entry for inclusion on Sale Offer
- Effective Management Reporting both by Report and Graph
- Performance reporting for Best Value
- Monitoring of Statutory Timescales
- Generation of Statutory Returns

Once implemented, the system provides excellent value for money by its ability to easily produce accurate and up to date management information and statutory reports, while significantly reducing the time and effort required to administer each sales application.

Introduction

The House Sales system has been developed to simplify and streamline the processing of House Sales applications in accordance with the current legislation.

Application	Name	Address	Status	Received
519	Mr John Gold	Block D, 109 Castlehill Avenue, Brucehill, New To	Final Settlement Received	
520	Mr Michael Jones	45 C Atholl Road, Brucehill, New Town, NT6 1FE	Sale Completed	
521	Mr Tom Mulholland	157 High Street, Town Centre, Old Town, T11 3CF	Application Rejected	01/06/1999
522	Mrs Kathleen Taylor	19 A Wilson Place, The Village, Old Town, T22 1PA	Sale Completed	
523	Mr Ian Adchison	140 F Johnstone Drive, Craigs, Old Town, T45 6GB	Application Withdrawn by Tenant	
524	Mr Alan Stubbz	High Street, Town Centre, Old Town, T11 3CD	Revised Sale Price Confirmed	
525	Mrs Linda Kain	20 B Wilson Place, The Village, Old Town, T22 1PA	First Sale Completion Reminder Issued	
526	Mr John Lambert	1 Aggill Avenue, Milton, Old Town, T23 9BB	Sale Completed	
527	Mr James Anderson	21 Kilmackinnon View, Silverton, Old Town, T25 9HH	Application Rejected	
528	Mr Peter Jackson	27 Johnstone Avenue, Craigs, Old Town, T45 7FF	Application Withdrawn by Tenant	
529	Mr Harry Hood	19 A Campbell Drive, Dyedview, Old Town, T10 7HL	Final Sale Completion/Reminder Issued	14/04/1999
530	Mr Craig Burley	Ground Floor, 124 Castlehill View, Brucehill, New	Application Withdrawn by Tenant	
531	Mr Paul McElroy	96 Main Street, Town Centre, Old Town, T11 2AD	First Sale Completion Reminder Issued	

Powerful search facilities are available to make it simple to find either the property or application required.

Once an application has been found then all of the processes which need to be carried out, from Enquiry through to Offers and Completion, are available from within a single screen.

Automated links to Microsoft Word allow both mandatory and optional letters and memos to be produced automatically at each stage of the process.

Local Authority / Housing Association
Headed Stationery

Date: 30/04/2004

Clear Call: 320
If telephoning please call:
0141 507 4004

House Sales Administration

The House Sales package provides a solution to the following :

- Sales Application Processing
- Application Status Tracking
- Sales by RTB, RTM, RTA and Voluntary Purchase Schemes
- Automatic Letter / Memo Creation
- Automatic Statutory Returns
- Application Timescale Monitoring
- Management Information, Statistics and Reports

Property Details

The starting point for the House Sales system is a reference file of the properties that are available for sale, normally an extract from the main Rent Accounting, Housing Management or Assessors system. This ensures that all applications processed by the House Sales system correctly reference the property to which they relate. Addresses conform to BS7666.

Sales Enquiries

Sales enquiries can be logged on the system if required and a covering letter for the Application Form can be generated.

Previous Applications

When sales enquiries or applications are being processed, if any previous applications have been recorded for the property, the details of the applications will be highlighted and the application details can be viewed.

Sales Applications

Tenancy Details

The details of all tenancy periods provided by the applicants, current and previous, can be entered. These details will not be considered for discount until 'Confirmed'. Once confirmed the system automatically calculates the Qualifying Years for discount.

Processing Applications by Stage

Once entered Applications can be easily identified within the system by searching on part or all of the Application Reference, Surname, Street, House No, Town or Postcode, or by Status.

Within the main Application Screen each stage of the House Sales process is made available as a separate Tab and only shown when appropriate

The screenshot shows the 'Process Application' window with the following details:

- Application No: 529
- Property Address: 18A Campbell Drive, Dydeview, Old Town, T10 7HL
- Old Ref: [Empty]
- Application Received: 14/04/1999
- Application Acknowledged: 15/04/1999
- Application Confirmed: 21/06/1999
- Application Requested: 15/04/1999
- Application Received: 25/04/1999
- Assessors Checked: 10/07/1999
- Application Held Until: [Empty]
- Assessors Cleared: [Empty]
- Lease Processing Commenced: 15/04/1999
- Offer to Sell Initial Offer: 10/07/1999
- Offer to Sell Appeal Offer: [Empty]
- Offer Accepted: 04/09/1999
- Date Withdrawn: [Empty]
- Date Reinstated: [Empty]
- Date Completed: 06/07/2000
- Date Bought Back: [Empty]

The screenshot shows the 'Process Application' window with the following details:

- Application: 529
- Old Ref: [Empty]
- Status: Final Sale Completion Reminder Issued
- Updated by: merchant
- Received: 14/04/1999
- Entered: 14/04/1999
- Accepted: 14/04/1999
- Acknowledged: 15/04/1999
- Updated on: 10/02/2004 13:57
- Applicants/Family: Mr Harry Hood, Non Applicant, Tenant, Purchaser, White; Mrs Jane Hood, Tenant, Purchaser; Miss Red Riding Hood, Purchaser, Refused
- Refusal Details: Paragraph 11 Refused [Empty]; Date Refused [Empty]; Refusal Reasons [Empty]
- Property Address: 18A Campbell Drive, Dydeview, Old Town, T10 7HL
- Correspondence Name: Mr Harry Hood
- Address: The House, 18A Campbell Drive, Dydeview, Old Town, T10 7HL
- Principal Home: [Checked]
- Price Tenancy Details Requested: [Unchecked]
- Telephone Nos: Home, Work, Mobile [Empty]
- E-Mail Address: [Empty]
- Scheme: Right to Buy; House/Flat: House; Tenure: Freehold
- Property Details: Date Built: 28/05/1905; Modernised: [Unchecked]; Non standard construction: [Unchecked]; Warning - Defective property: [Checked]; Property Type: Detached; Size: Three bedroom; Heating: Gas central heating; Garage: [Empty]; Additional Land: [Empty]; Additional Features: Entry Phone; Improvements: [Empty]; District: District 2 description; Area: [Empty]; Area1 Description: [Empty]; Ward: Ward 2 description

When a sales application is received the property reference details are searched to identify the appropriate property. The system automatically allocates an application reference number and displays the main application detail entry screen showing all of the property details which are available.

The information provided by the applicants is entered on the Application screen and the Scheme Type, Property Type and Tenure Type are selected. The application is now ready to be processed.

Application Status

The Status 'Tab' above gives a quick summary of the applications progress showing the key dates applicable to each stage of the process, with target dates highlighted.

Correspondence and Memos

The system provides standard letters and memos which are generated automatically as required at each stage of the House Sales process. This is achieved by linking documents to events as part of the system configuration. As the documents are Word based, the format can be customised by the users when required. This facility also allows each organisation to add additional letters and memos specific to their own circumstances. These documents can be printed, faxed or e-mailed as required.

Schemes, Discounts and Price Calculation

The Schemes available are Right To Buy (RTB), including Preserved Right to Buy, Rent To Mortgage (RTM), Right to Acquire (RTA) and Voluntary Purchase. The system automatically calculates the Discount and Sale Price for RTB and RTM, using the Scheme, House Type, Tenancy Details (both current and previous) and Valuation entered.

Standard and Ad-Hoc Reporting

The system provides a number of standard reports for which selection criteria can be specified. In addition the underlying database can be interrogated by a number of standard windows reporting tools to enable ad-hoc enquiries and reports to be produced by internal staff.

Process Application

Application No. 528 Property Address T8A Canobell Drive
Old Ret. Dydeview Old Town TT10 7HL

Scheme

Right to Buy

Property Value	£53,000.00
Qualifying Years	10
Discount Percentage	40.00%
Qualifying Discount	£20,000.00
Discount Received	£10,000.00
Discount Repaid	£10,000.00
Previous Net Discount	£0.00
Net Discount	£20,000.00
Cost Floor	£0.00
Discounted Sale Price	£33,000.00
Garage Value	£0.00
Land Value	£0.00
Total Sale Price	£33,000.00

Rent to Mortgage

Weekly Rent	£125.00
Mortgage Term - Years	0
Months	0
Initial Payment - Minimum	£70,312.00
Maximum	£36,400.00
Actual	£0.00
Percentage of Property value	0.00%
Landlord's Share	0.00%

RTM Rent to Mortgage option not available

Date Sale Price Confirmed

Process Application

Application No. 528 Property Address T8A Canobell Drive
Old Ret. Dydeview Old Town TT10 7HL

Events printed

User	Date/Time	Document
meschant	17/04/2001 15:59	Agreement of Application Receipt Letter
meschant	17/04/2001 15:59	Application to Purchase Received
meschant	17/04/2001 15:59	Notice
meschant	17/04/2001 16:00	Request Letter

Documents not printed

Service Charges

Details of estimated Service Charge values entered as either Block or Individual Flat charges can be recorded for properties subject to Service Charges. These details can then be incorporated into the Sale Offer document..

Ad-hoc Documents

Not all of the letters and memos generated by the system need be produced as the result of the entry of information. Ad-hoc letters can be selected from a letters menu. Names and address details are merged into these documents to provide an initial document the text of which can then be amended before being stored with the application.

Reminders

Reminder reports are available to highlight cases where requested information has not been received and reminders should be issued.

Statutory Returns

Each of the statutory returns required is produced automatically by the system.

Event Log and Notepad

Each document which is produced from the system is automatically logged so that a history of the actions taken, and correspondence sent to each applicant, can be reviewed. Documents can be retrieved by double clicking the appropriate entry.

Multiple Departments

Individual users will be assigned permissions that allow update or enquiry access to specific tabs on the application screen. This facility allows the sharing of access between a number of different departments.

Parameterisation

The system is extensively parameterised to ensure that it can be customised to suit the needs of individual organisations. The parameterisation also allows each key piece of information to be entered on the screens via selection from drop down lists.

Interfaces to Other Systems

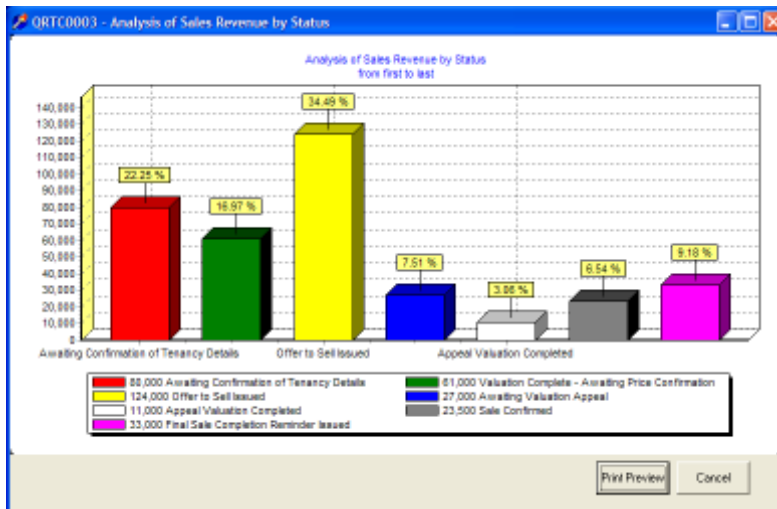
Where interfaces are required to other systems these can be provided as an add-on facility.

Management Information & Statistics

The information held within the system allows the progress of each application to be monitored against the statutory timescales.

User analysis of the data has been simplified due to the parameterisation of all the key data items.

In addition the key management information is made available in both report and graphical form, like this analysis of revenue by sales stage.



Platform / System Environment

House Sales is a client /server application which runs on a wide range of hardware platforms.

The client application can be installed on PC's operating under Windows 95/98/Me/2000/NT and XP.

The underlying database server can be either Access or SQL Server. Access can be implemented on a network file server while SQL Server is available for Windows NT/2000/2003 Servers.

The standard Letters and Memos produced by the system are available as Word document templates.

Data Conversion & Load

Conversion and load of existing sales applications into the system is an option, subject to the status and format of the existing computerised data.

Merchant Software Limited

Merchant Software Limited is an independent software company which has extensive experience of working with both Local Authorities and Housing Associations.

The approach which the company has adopted is to work in partnership with clients in order to build a long term relationship which will mutually benefit each organisation.

The company's experienced staff will be happy to ensure that all aspects of the installation, commissioning and after sales support are handled to the clients satisfaction.

Merchant Software Limited is TickIT accredited.

Future Developments

It is the intention of Merchant Software Limited that the functionality of the system will continue to be enhanced by the development of additional facilities.

Merchant Software Limited would welcome any input and suggestions from interested users.

Product Information

Details of the House Sales system and our other products can be found on our web site www.merchantsoftware.co.uk.

Contact Details

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Whilst Merchant Software Limited have gone to considerable lengths to ensure the information presented in this brochure is accurate, constant development of the product will mean that the specification and format are liable to change. If you require specific information regarding the Council House Sales then please contact us for the latest information.

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