Uploading Proof of Identity and Address Documents for a Vendor Record.

This guide provides a straightforward process for uploading essential identity and address verification documents for vendor records, ensuring compliance with necessary requirements.

By following the outlined steps, users can efficiently manage their documentation in a centralised platform, streamlining vendor management.

Viewing this guide will help maintain accurate records and avoid potential delays in vendor onboarding or transactions.

1 Navigate to a Sales Vendor record. This can be done via a search for records in the global search, using the Vendor tile in the sales activity list or the Vendor option in the Sales Menu **Search**

(i) This process allows you to update the 'Identity Confirmed' and 'Address Confirmed' fields in the top left of the screen with a green tick and update the box highlighted below.

2 Once you have found the Vendor you are adding the documents for. Click "Documents",

Details

⊘ Checklist

🏠 Properties

🪪 Contacts

📁 Documents

📅 Journal

✒ E-Sign

⊘ Audit

Personal Information

Title
Mrs ▼

Forename
Sales

Surname
Vendor30

Company Name

Salutation
Mrs Vendor30 ✂

Website

Phone Number

Work phone

Mobile phone 📱SMS

Email Address
zagg.dave2@gmail.com ✉

Source
Advert ▼

Vendor

Addre
Conta

Addre
4 King

House
4

Line2

Coun
Coun

---

3 Click "Add Document"

iam property   My day   Lettings ⌄   Sales ⌄   Accounts ⌄   Reporting ⌄   Communication

Properties	1
Identity Confirmed	✕
Address Confirmed	✕
Last Contacted	

+   Add Document

⬍ Sort Documents ▼

Search 🔍
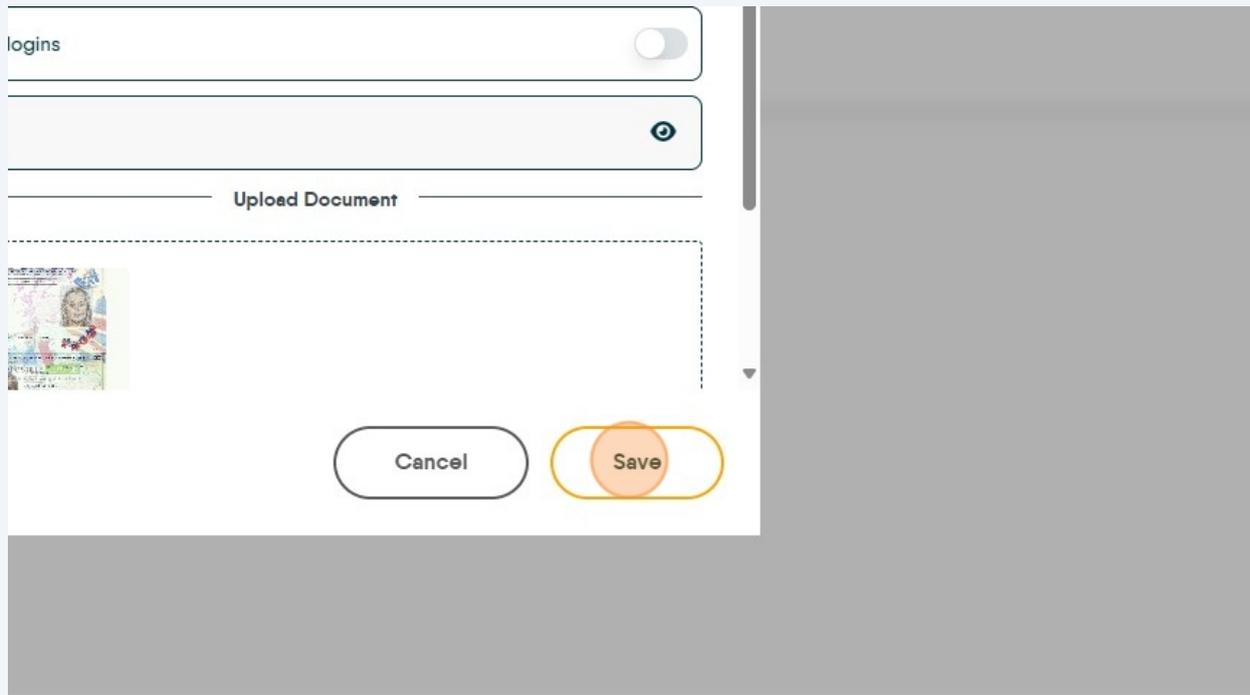
Clear filters

👤 Details

⊘ Checklist

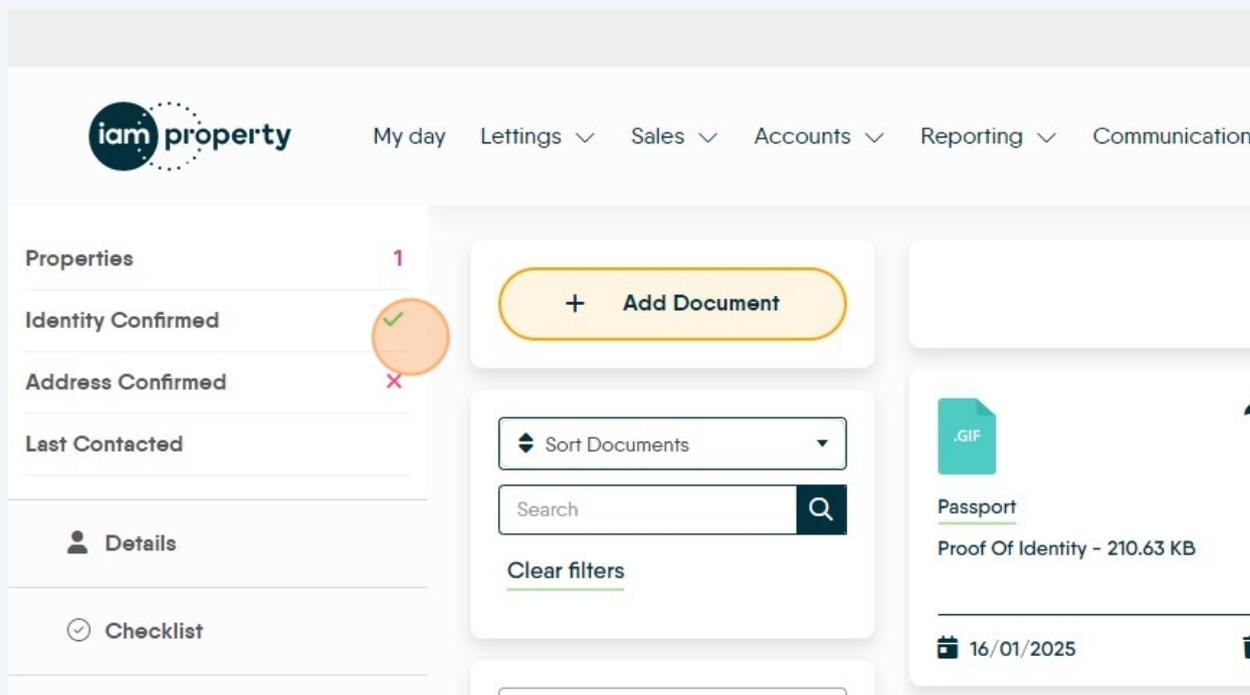**4** From the drop down menu click "Proof of Identity"
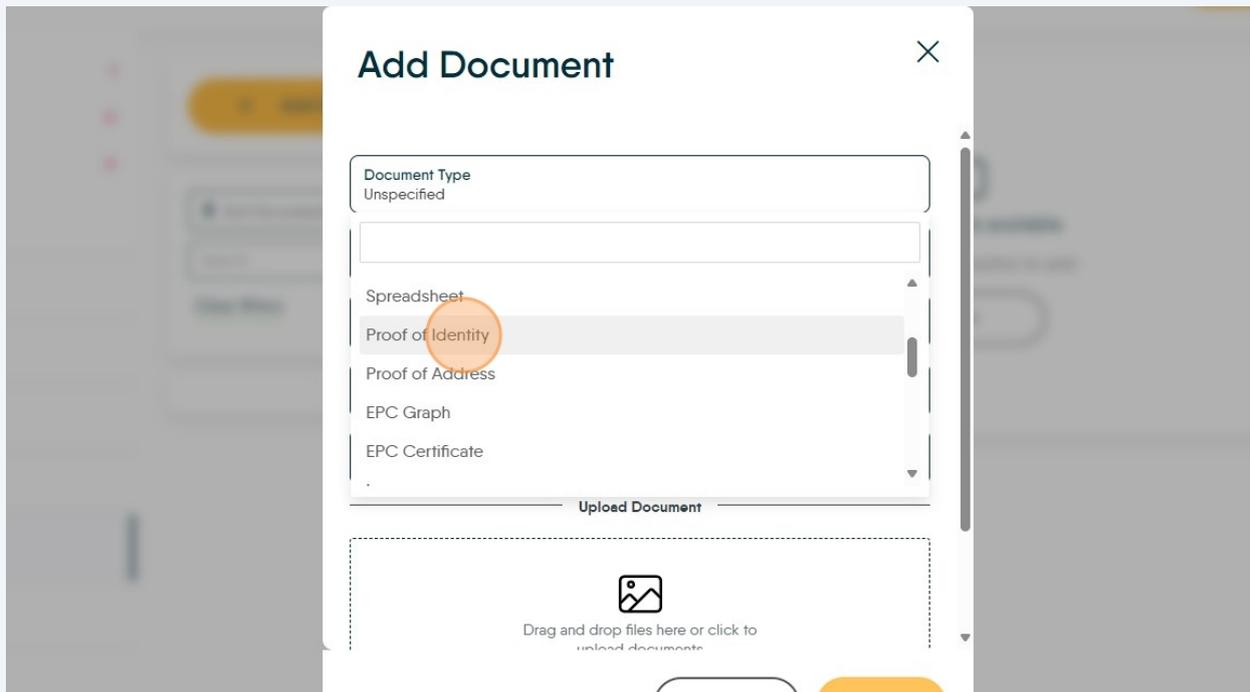
5 Click into the Upload Document screen. This will open a download screen where you can search for and select the document, alternatively the document can be dragged and dropped from a folder or from an email.
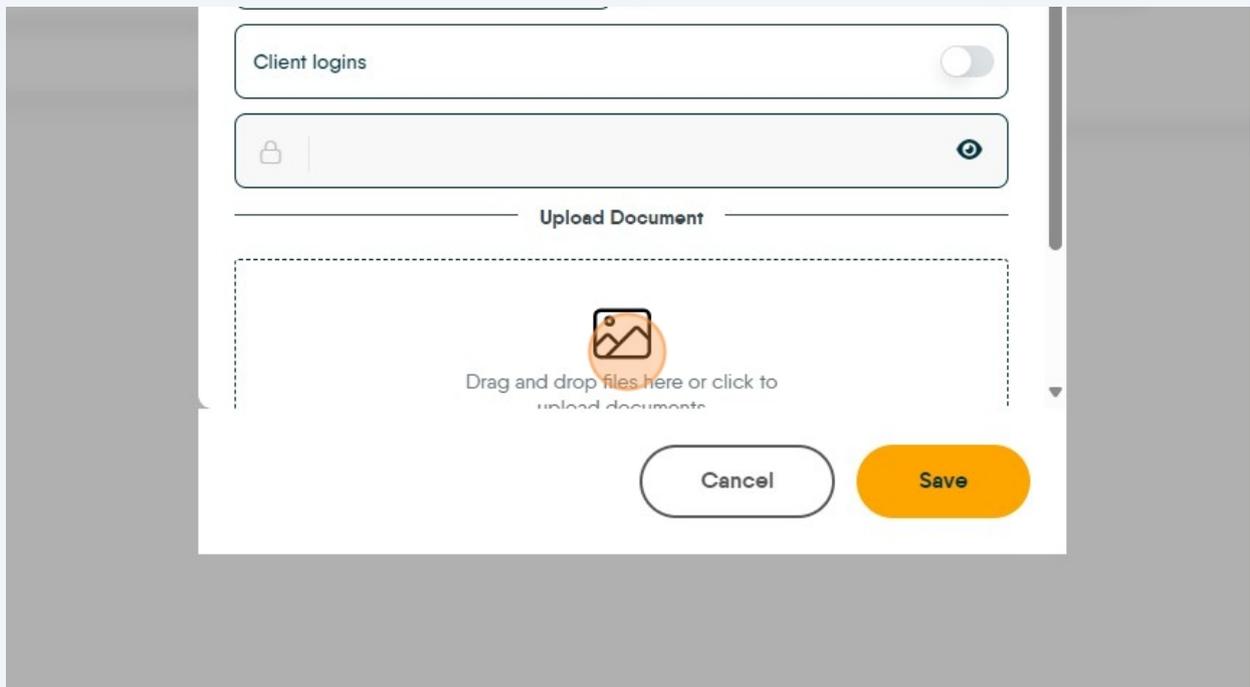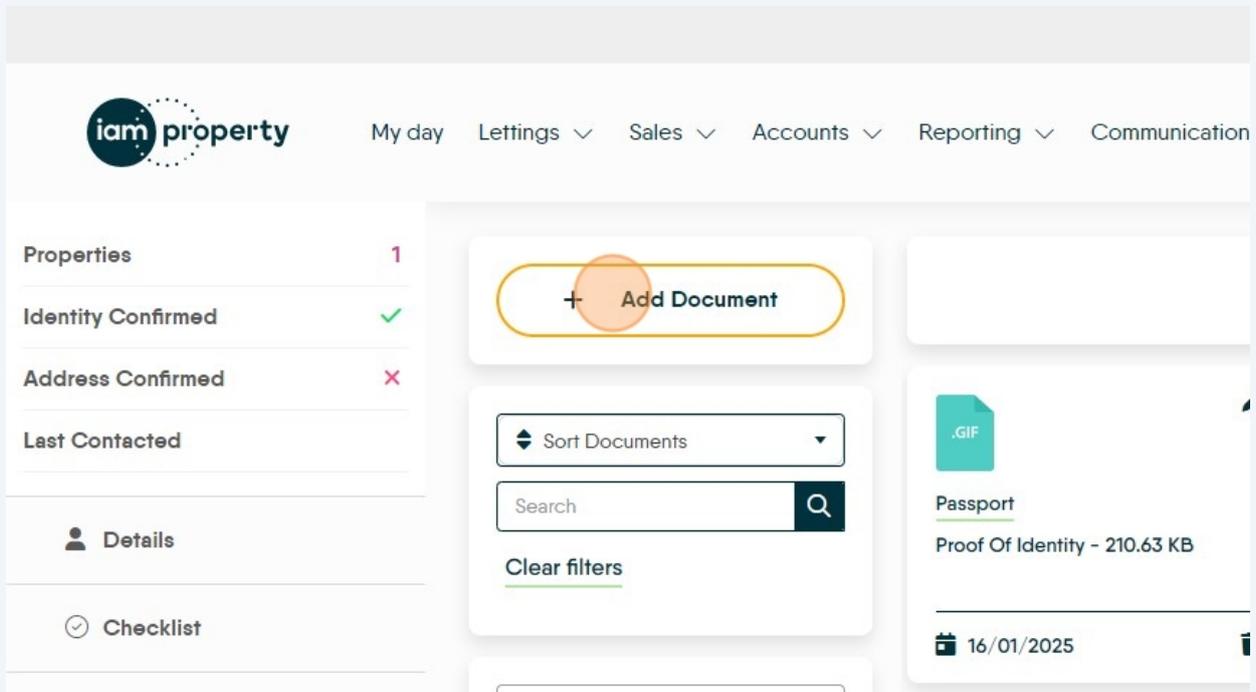
6 Click "Save"

7 You will see the Identity Confirmed option is now a green tick.

To update the Address Confirmed option repeat the process, selecting the Proof of Address option

8 Click "Add Document"

9 Click and scroll to find "Proof of Address"
Click "Proof of Address"
Click here.

Add Document

Document Type
Unspecified

Compliance Certificate

Unspecified

Contract

Statement

Invoice

Document Type
Unspecified
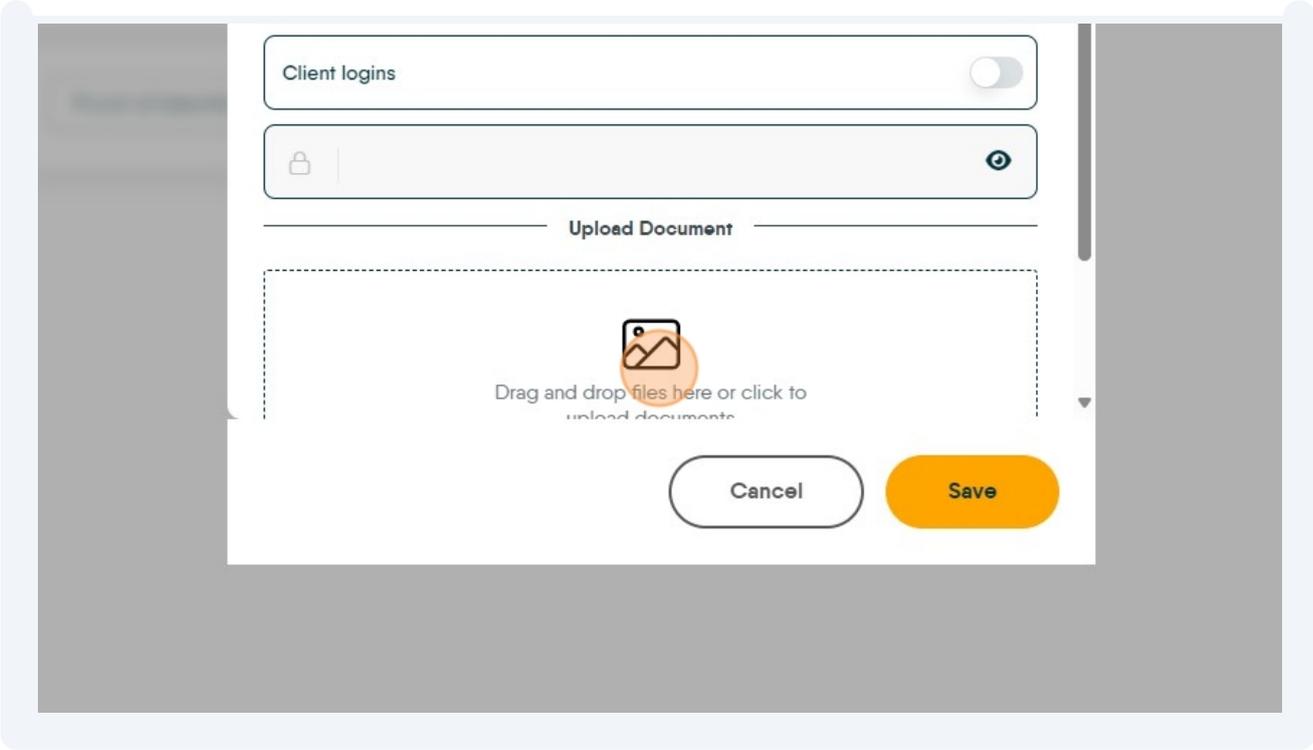
Spreadsheet

Proof of Identity

Proof of Address

EPC Graph

EPC Certificate

Upload Document

Drag and drop files here or click to

Client logins

Upload Document

Drag and drop files here or click to upload documents

Cancel   Save

10 The file name will automatically update with the name of the file uploaded, click and edit if required.

Add Document ✕

Document Type
Proof of Address

File Name   *
Passport Address Proof

Expiry date   Password Protected

Client logins

Upload Document

11 Click "Save"

gins

Upload Document
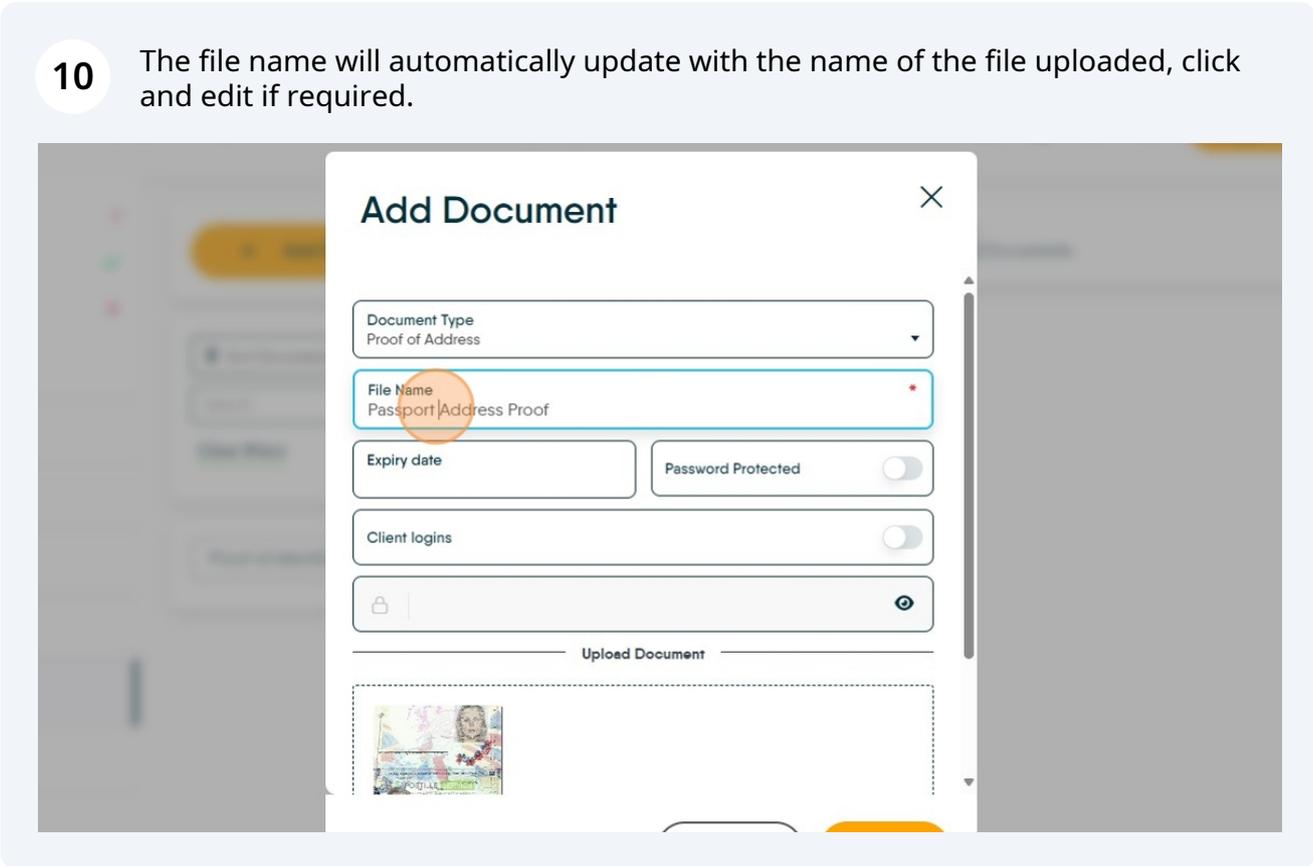
Cancel   Save
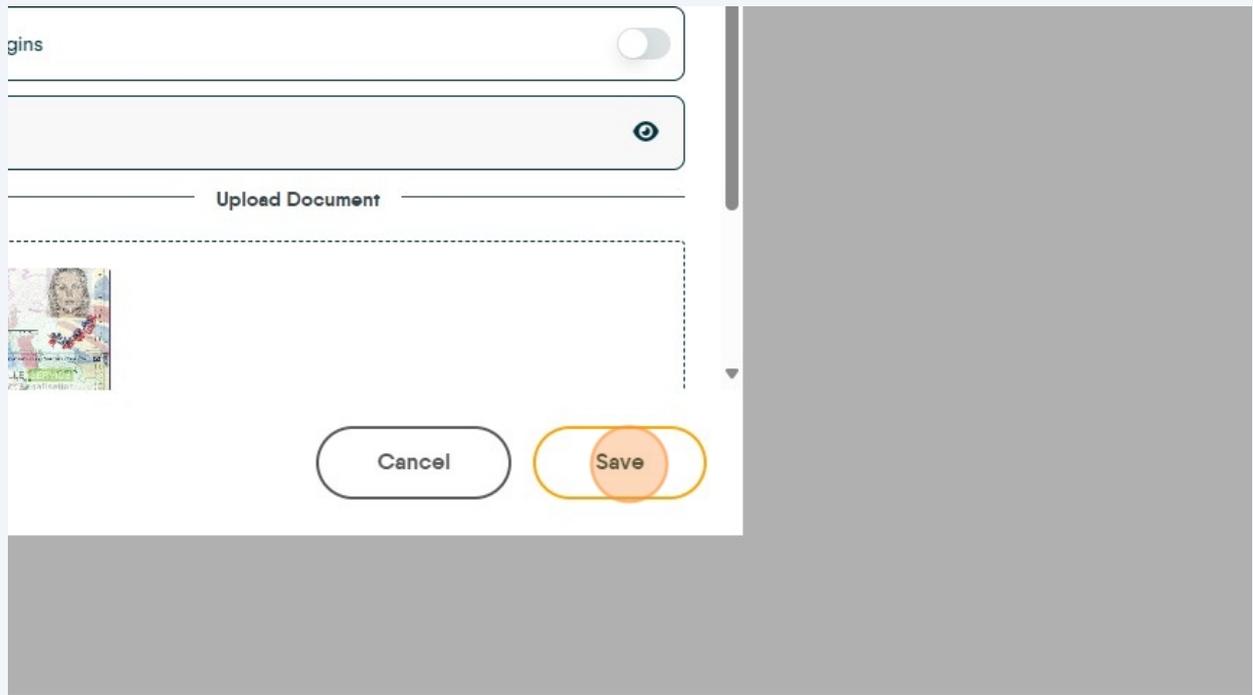
12 Both Identity and Address Confirmed will now be green

Properties   1

Identity Confirmed   ✓

Address Confirmed   ✓

Last Contacted

👤 Details

⊘ Checklist

🏠 Properties

👤 Contacts

+ Add Document

⇕ Sort Documents   ▼

Search   🔍

Clear filters

Proof of Identity

Proof of Address

.GIF

Passport
Proof Of Identity – 210.63 KB

📅 16/01/2025
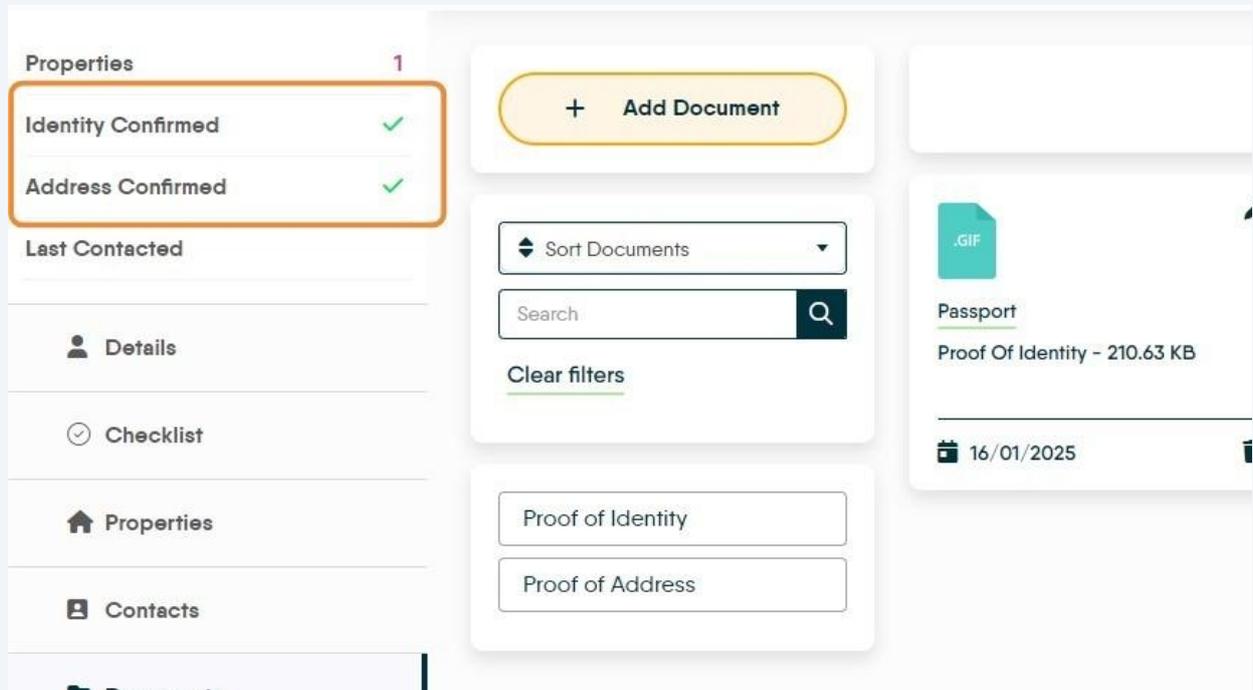
> **(i)** Tip! This is the same process to add any document to the Vendor record, or in fact to add a document to any CRM record.