

Adding or Updating Warning Messages

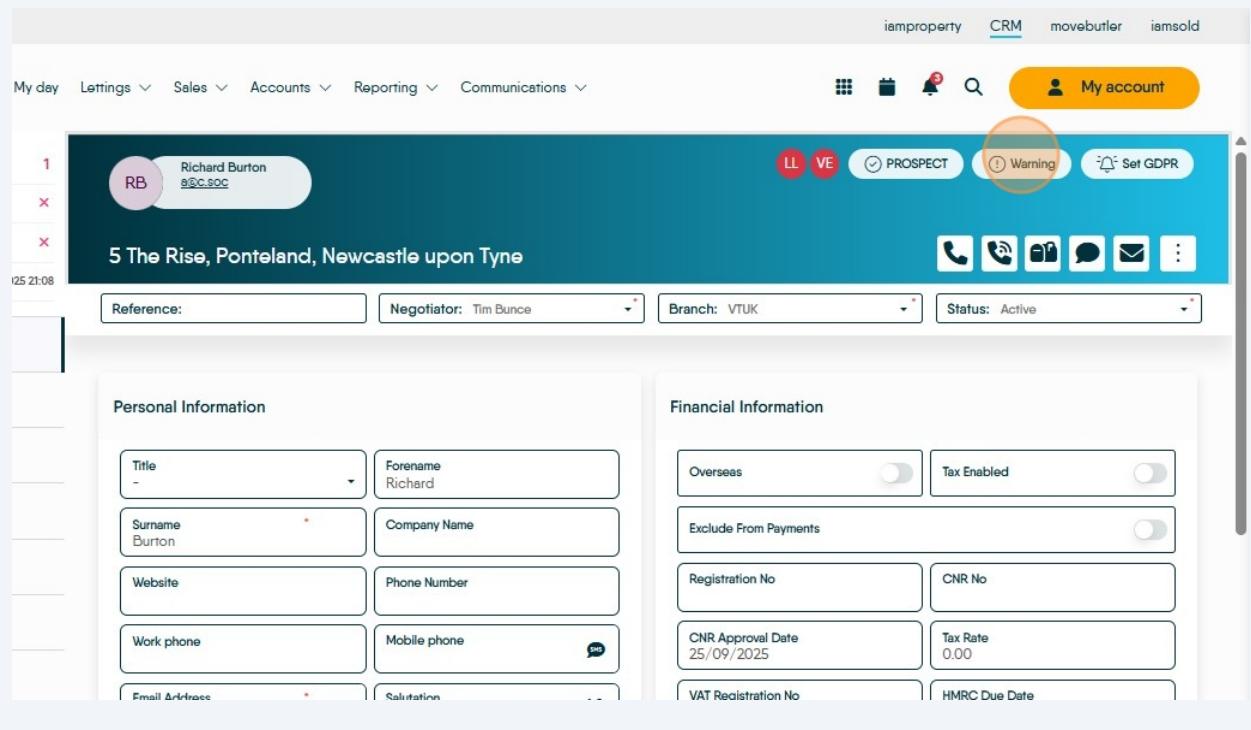


1

Navigate to the record to which you need to add a warning. This example shows a Landlord page but the process is the same on all other records.

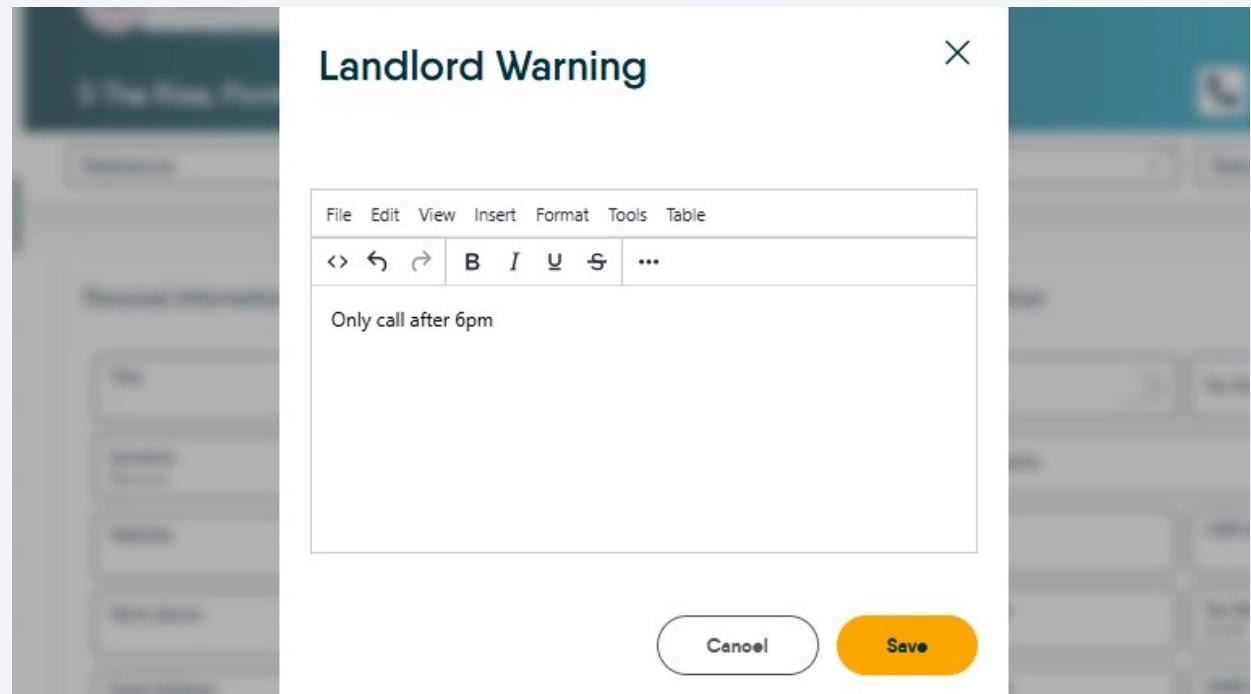
The screenshot shows a software interface for managing property records. At the top, there is a header with a profile picture of 'Richard Burton' and some status indicators (LL, VE, PROSPECT, Warning, etc.). Below the header, the address '5 The Rise, Ponteland, Newcastle upon Tyne' is displayed. The main content area is divided into two sections: 'Personal Information' and 'Financial Information'. The 'Personal Information' section contains fields for Title (dropdown), Forename (Richard), Surname (Burton), Company Name, Website, Phone Number, Work phone, Mobile phone, Email Address (a@c.soc), Salutation (dropdown), and Agreement Name (dropdown). The 'Financial Information' section contains fields for Overseas (toggle switch), Tax Enabled, Exclude From Payments, Registration No, CNR No, CNR Approval Date (25/09/2025), Tax Rate (0.00), VAT Registration No, HMRC Due Date (25/09/2025), Statement (dropdown, No Statement), and Send Statement Via Email.

2 Click "Warning"



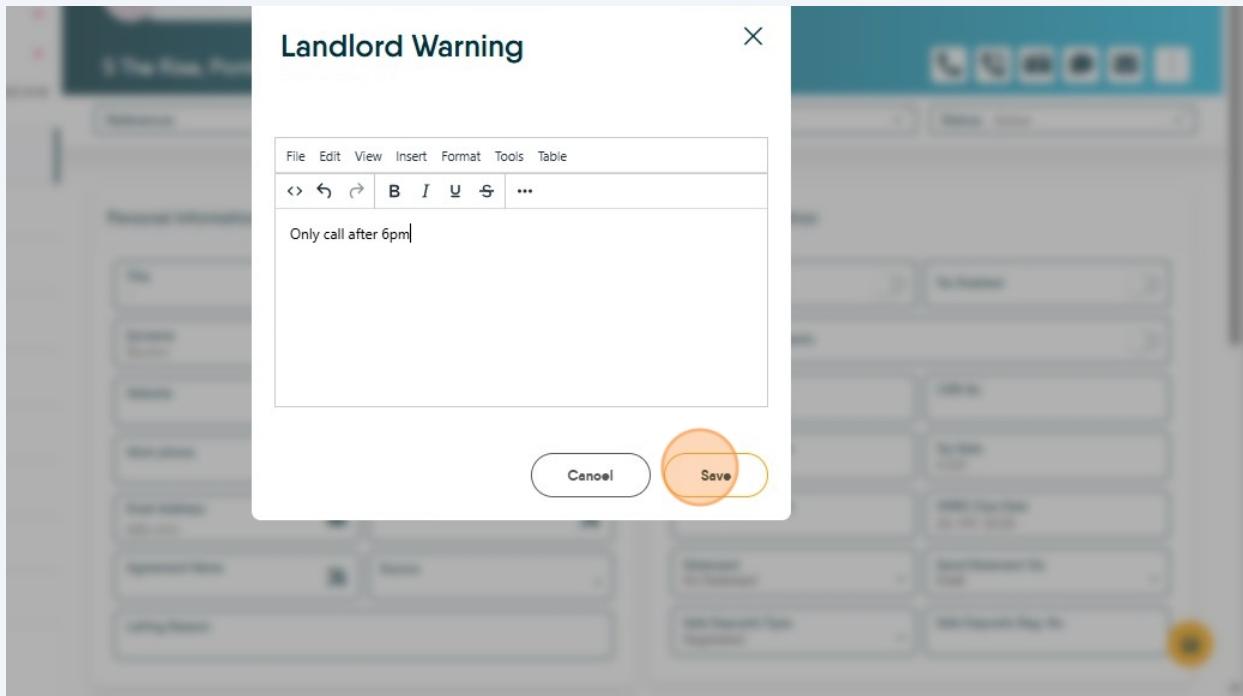
The screenshot shows a contact profile for 'Richard Burton' (B@C.SOC). The top navigation bar includes 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', 'Communications', and 'My account'. The contact details are: '5 The Rise, Ponteland, Newcastle upon Tyne'. Below the contact info are dropdowns for 'Reference', 'Negotiator' (set to 'Tim Bunce'), 'Branch' (set to 'VTUK'), and 'Status' (set to 'Active'). The main area is divided into 'Personal Information' and 'Financial Information' sections. The 'Personal Information' section contains fields for Title (dropdown), Forename (text: 'Richard'), Surname (text: 'Burton'), Company Name (text: 'B'), Website (text: 'B'), Phone Number (text: 'B'), Work phone (text: 'B'), Mobile phone (text: 'B'), Email Address (dropdown), and Salutation (dropdown). The 'Financial Information' section contains fields for Overseas (toggle off), Tax Enabled (toggle off), Exclude From Payments (toggle off), Registration No (text: 'B'), CNR No (text: 'B'), CNR Approval Date (text: '25/09/2025'), Tax Rate (text: '0.00'), VAT Registration No (text: 'B'), and HMRC Due Date (text: 'B'). The 'Warning' button in the top right is highlighted with an orange circle.

3 Add the required warning. If you are pasting from elsewhere, make sure to paste as plain text.

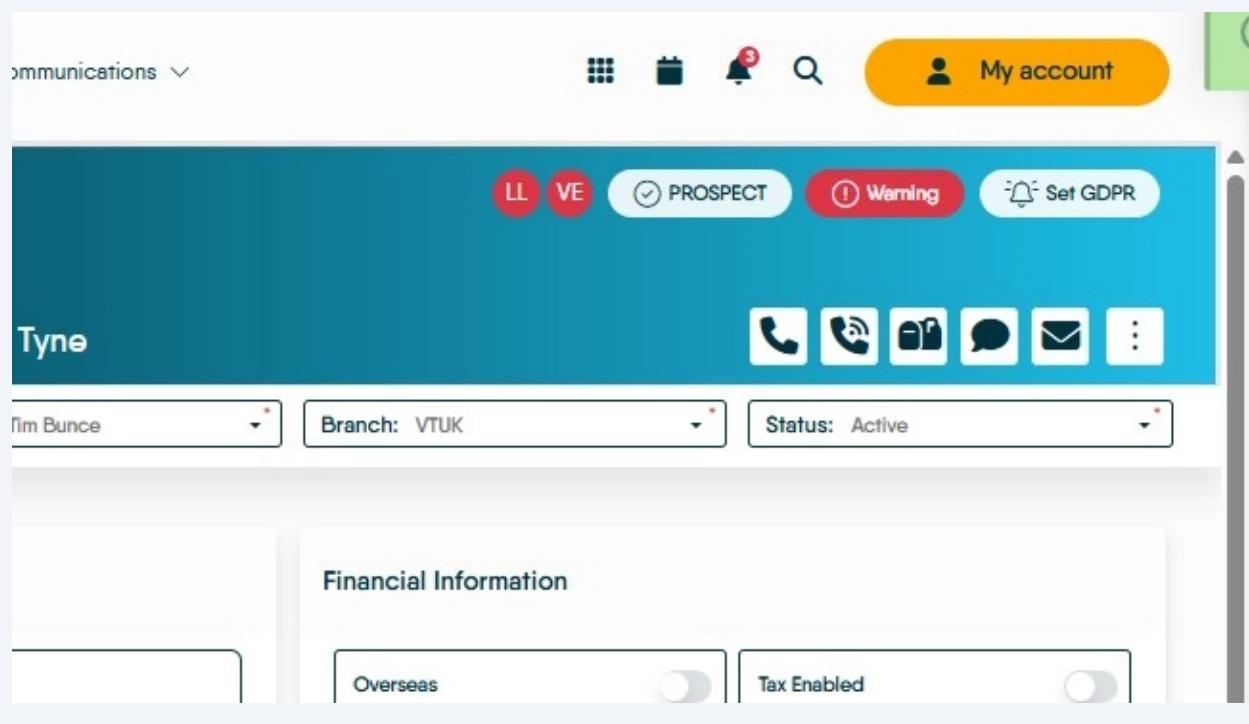


The screenshot shows a 'Landlord Warning' dialog box. The title bar says 'Landlord Warning' with a close button 'X'. The dialog has a toolbar with 'File', 'Edit', 'View', 'Insert', 'Format', 'Tools', and 'Table' menus, and a set of text editing icons (bold, italic, underline, etc.). The main content area contains the text 'Only call after 6pm'. At the bottom are 'Cancel' and 'Save' buttons, with 'Save' highlighted in orange.

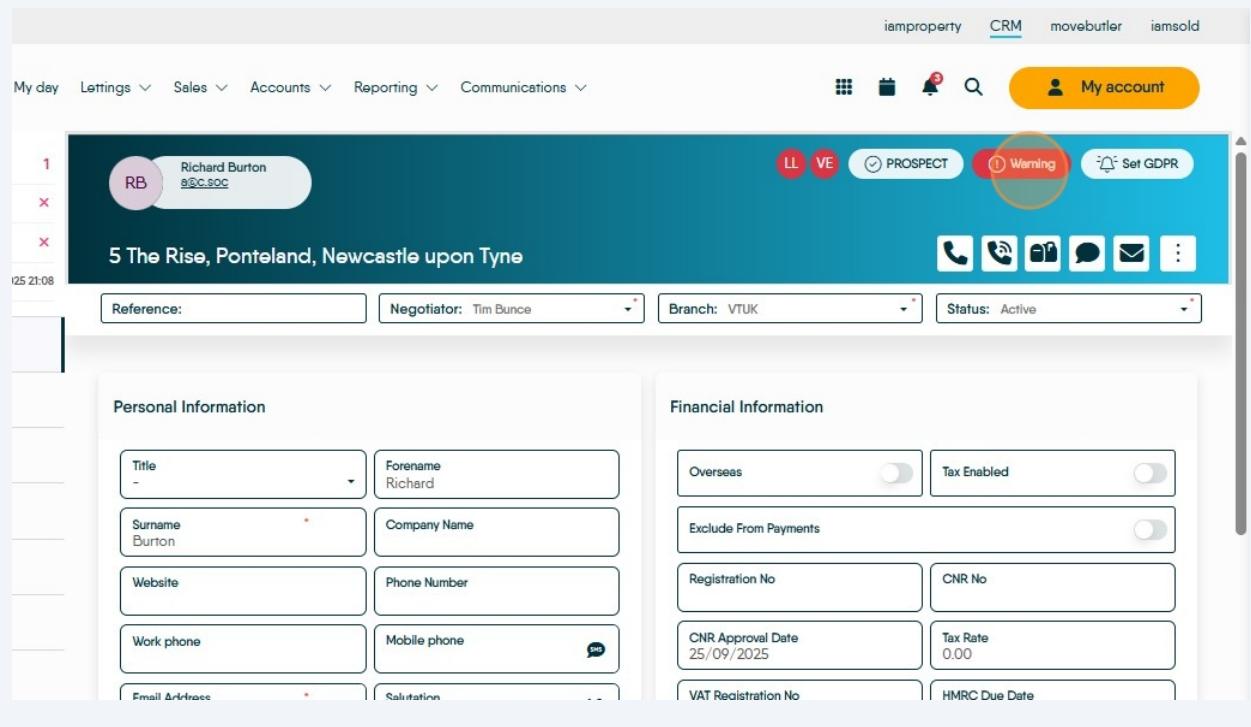
4 Click "Save"



5 The button will then display in red to show a warning is active.



6 To edit the warning, click the button as before, make your changes, and save.



Richard Burton
5 The Rise, Ponteland, Newcastle upon Tyne

Reference: Negotiator: Tim Bunce Branch: VTUK Status: Active

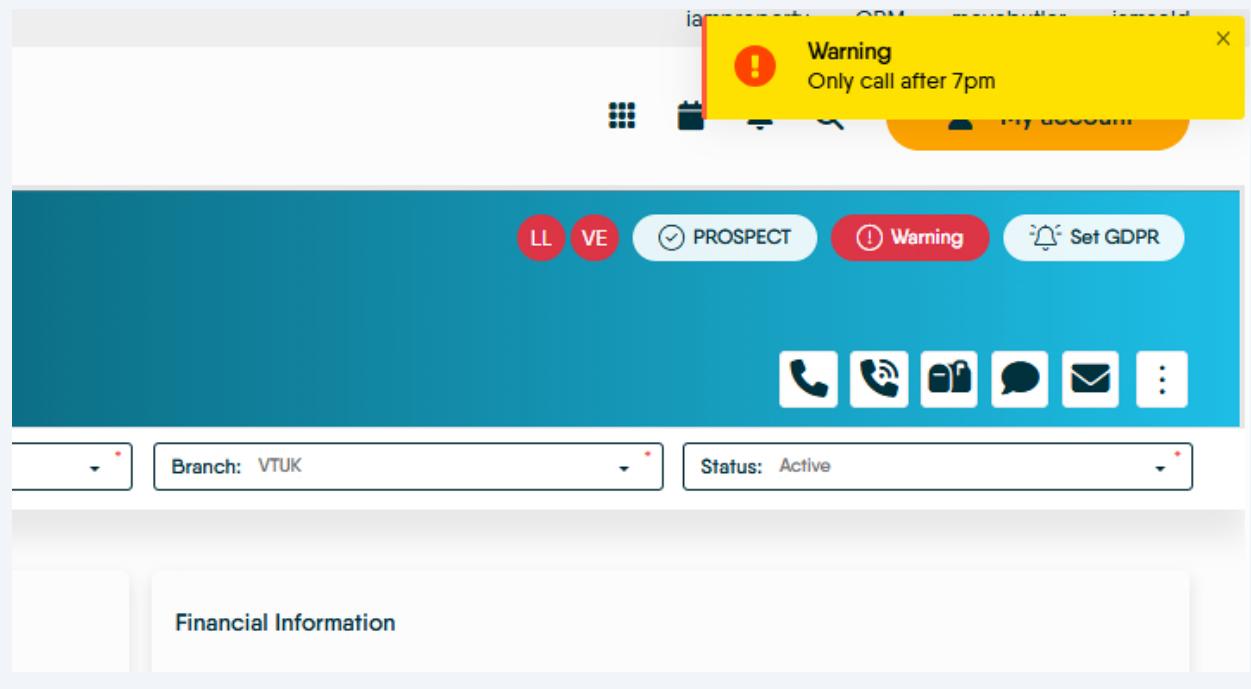
Personal Information

Title	Forename
-	Richard
Surname	Company Name
Burton	
Website	Phone Number
Work phone	Mobile phone
Email Address	Salutation

Financial Information

Overseas	Tax Enabled
Exclude From Payments	
Registration No	CNR No
CNR Approval Date	Tax Rate
25/09/2025	0.00
VAT Registration No	HMRC Due Date

7 The next time the record is accessed, the warning will display in the top-right of the page.



LL VE PROSPECT Warning Set GDPR

Branch: VTUK Status: Active

Financial Information