

# Buyer Ready Guide

Progress every sale with confidence.

**STREET** Search...

Getting Started  
Street Wise  
Dashboard  
Enquiry Centre  
ORGANISE

### Add New Proof of Funds

Details

Proof of Deposit

Mortgage in Principle

Accept

How are they purchasing the property?

With a mortgage Without a mortgage

Which best describes them?

Have a mortgage agreed in principle Have nothing arranged yet

① You can now upload the Proof of Funds and Mortgage in Principle using

### Deposit

Deposit amount

£

☐ Using the equity from the sale of their current home as part of the deposit

### Mortgage

Mortgage amount

£

Lender

Does the applicant have a mortgage broker?

Yes No

**Proof of Funds**

Please upload your proof of funds for your offer on 52 New Ruttington Lane

Birchstone ESTATE AGENTS

What is your deposit amount?

£

Upload Proof of Deposit

- A bank statement that shows your deposit amount
- Evidence that the money for the deposit or sale has been gifted to you

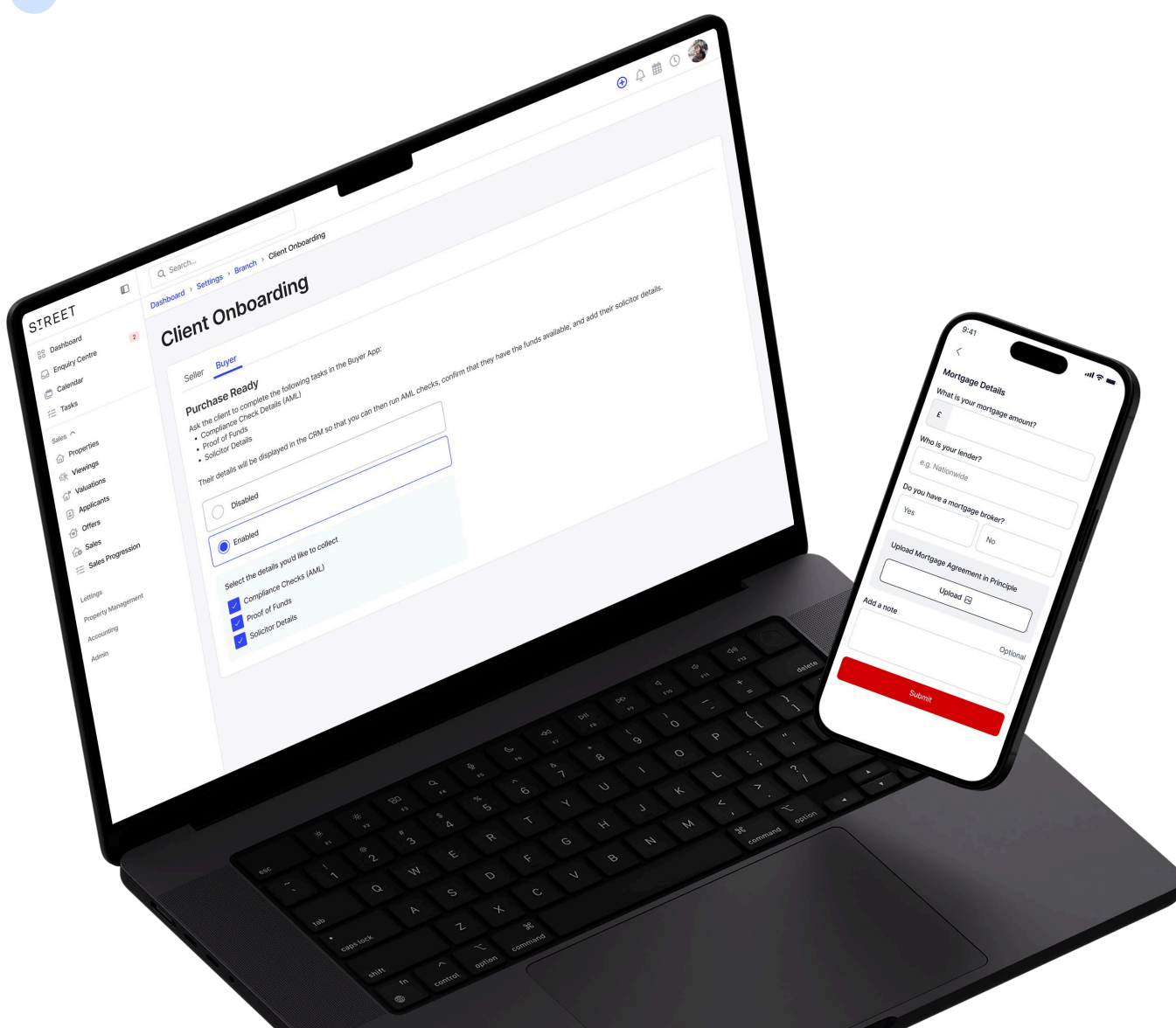
Upload

☐ I'm using the equity from the sale of my current home as part of my deposit

# What is Buyer Ready?

Buyer Ready is a built-in feature within Street.co.uk that allows your agency to request and collect the critical documents and information needed from buyers at the point of an offer being accepted, including:

- ✓ AML verification
- ✓ Proof of funds
- ✓ Mortgage lender information
- ✓ Solicitor details



# How can Buyer Ready help?

Your objective is to reduce fall-throughs, speed up exchanges, and free yourself and your team from chasing paperwork and compliance admin.

Buyer Ready helps you:



## **Reduce fall-throughs**

The industry is seeing more fall-throughs now than ever before, often due to missing or late-stage buyer documentation. Buyer Ready allows you to collect AML, proof of funds, and solicitor details early in the process – creating stronger pipelines and greater deal certainty.



## **Speed up the sales process**

By automating buyer readiness tasks, your team can spend less time chasing paperwork and more time progressing deals. Faster buyer onboarding means less time between offer and exchange.



## **Improve compliance and reduce manual work**

Avoid late-stage issues and fragmented workflows. Buyer Ready centralises document collection in a clear, trackable buyer checklist, through the Client App – eliminating back-and-forth emails, spreadsheets, and checklists.

# The Buyer Ready Challenge.

New, streamlined processes are only effective if your team can transition smoothly from their current way of working.

Right now, your team is likely chasing buyers for key details, like AML documents, proof of funds, lender information, and solicitor contacts, often through a mix of emails, phone calls, and scattered manual notes.

You might have a third-party platform to handle AML checks, but other important documents are probably being collected inconsistently and stored across different systems.

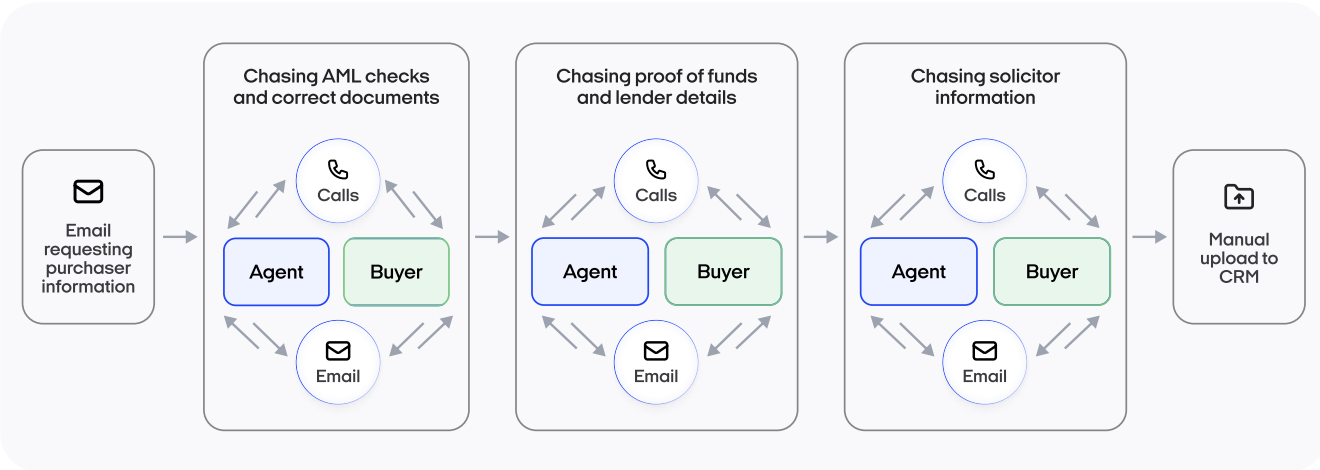
Not only is this a burden on your team, but it's a poor experience for your clients, often taking days to collate, and slowing down sales progression.



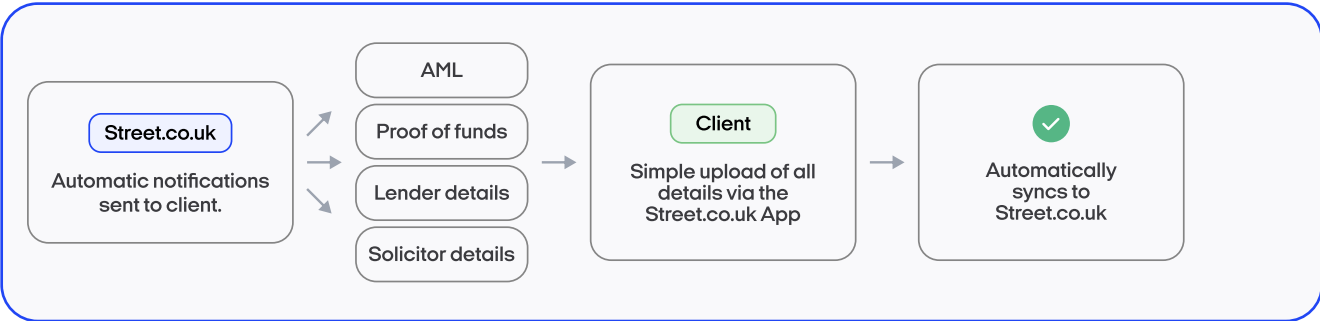


While changing habits can be tough, enabling Buyer Ready brings clear, immediate benefits. With everything centralised and automated in one place, your team will quickly adapt and see just how much time and admin it saves.

### The traditional process.



### The Street.co.uk way.



# How does Buyer Ready fit into your workflow?

Buyer Ready removes the need for this manual follow-up. It's built to support your existing workflow, allowing you to:

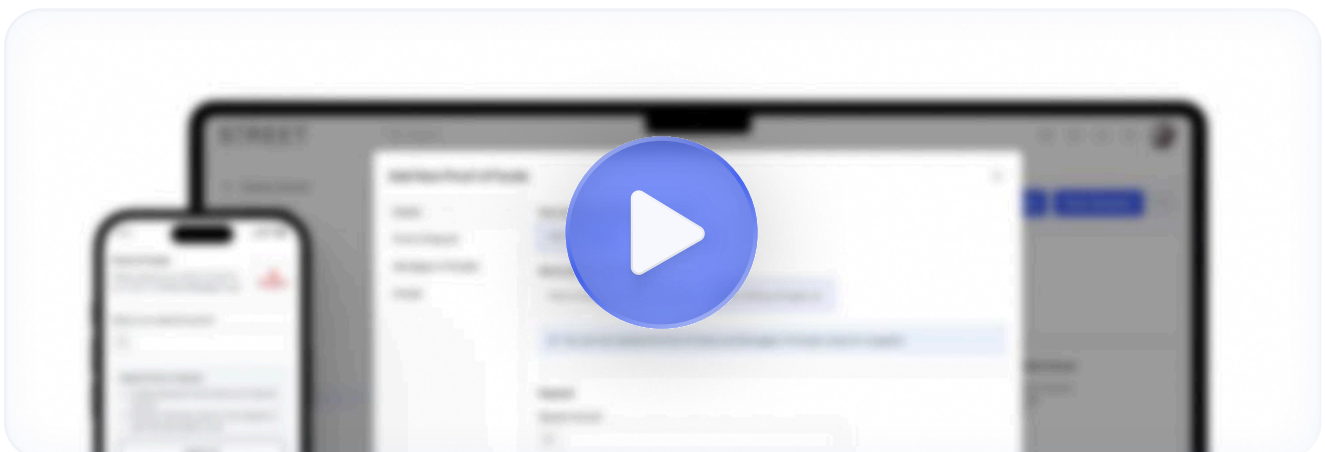
- Automatically trigger the document checklist at the point an offer is made or after an offer is accepted

or...

- Trigger the checklist manually when it suits your workflow

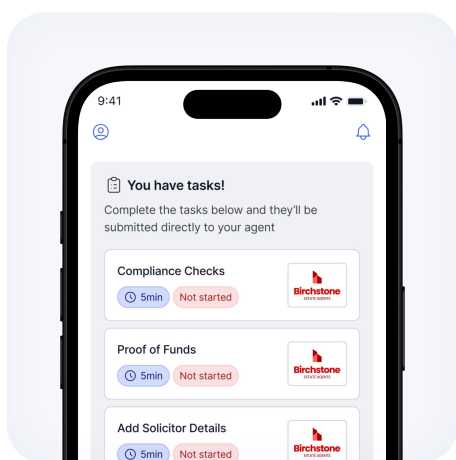
All progress is visible to your agents in Street.co.uk and to the buyer in their Client App. No extra systems, no added complexity – just a smarter way to capture vital information.

Buyer Ready is live and can be enabled in your Street.co.uk settings in a few clicks. Watch the video below to find out how, or keep reading for a step by step.

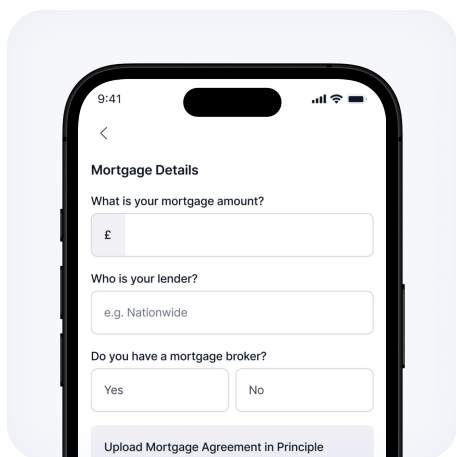


# What will the buyer see?

Based on your chosen settings, buyers will receive an email and, if they have the app, a push notification when Buyer Ready is triggered. Upon opening the Street.co.uk Client App, they'll see a list of tasks to complete.



First, they'll confirm how they're purchasing the property by uploading proof of deposit and any supporting documents, photos, or notes.



Next, they'll enter their mortgage details, including the amount, lender, and broker information as well as any relevant files.

9:41

<

**Solicitor Details**

Please upload your solicitor details for your offer on 52 New Ruttington Lane

Which firm does your solicitor work for?

What is your solicitor's name? Optional

What is their contact number? Optional

Birchstone

If they're selling a property, they'll add those details, which can be edited at any point before marking the task as complete. They'll also be asked to provide their solicitor's name, firm, contact number, and email.

entral

g v

**Interested Areas**

Birmingham Central  
Manchester  
Liverpool  
Leeds

Plus 5 more

^ Purchase Ready

Compliance Checks RECEIVED v

Proof of Funds RECEIVED v

Solicitor Details RECEIVED v

v Interested Properties

v Follow up

inutes ago

tes ago

All submitted information is securely stored in your Street.co.uk CRM, ready for review. You can edit or add to any section as needed.

Once a buyer completes their Buyer Ready steps, their details remain on file, helping you build a pipeline of qualified buyers.

With a Buyer Ready status, you can move forward with confidence, knowing everything's in place and the risk of fall-throughs is reduced.

# How to roll out the Buyer Ready feature.

## The steps to enabling Buyer Ready in Street.co.uk.

You can watch a [full demonstration here](#) on how to do this and see how it works. Alternatively, you can go through the following steps:



### Step 1

#### Set up Buyer Ready in your Street.co.uk settings

- Navigate to Buyer Ready in Settings > Branch Settings > Client Onboarding > Sales Applicant.
- By default, the Buyer Ready feature is already "Enabled".
- Choose when tasks should appear in the buyer's app:
  - After submitting an offer (default)
  - After an offer is accepted
  - When requested (manual trigger)

*Note: Only branch or company admins can access these settings.*

#### When should clients complete their tasks?



☐ Whilst submitting an offer

When submitting an offer in the Buyer app, clients must complete the tasks as part of their submission. If an offer is submitted in any other way, clients will still be able to complete the tasks in the app.

☐ After submitting an offer

We will display the tasks in the Buyer app once they have submitted an offer. If the offer is accepted and they have not completed the tasks, we'll send them a reminder

☐ When requested

We will not display the tasks, or notify the client about them until you click the button to send a notification about the tasks from the Sales Applicant page





## Step 2

### Collect essential buyer information

Within the Buyer Ready settings, select which details you want the automation to collect:

- **Compliance checks (AML):** Requires Landmark AML integration.
- **Proof of Funds:** Details on purchase method, deposit amount, mortgage status, and supporting documents.
- **Solicitor Details:** Firm name, solicitor's contact information.

Buyers will receive an email prompting them to submit this information through the Street.co.uk Client App. If they haven't already downloaded the app, they'll be guided to do so. Once submitted, the information will appear in the CRM for your review.

#### Notify Buyer



We'll send the buyer a notification to complete the tasks below via the app:

- ☒ Compliance Checks
- ☒ Proof of Funds
- ☒ Solicitor Details

They will receive an email notification, and a push notification to their phone if they have the app installed.

🕒 An automated notification was sent on 05/06/24

Preview

Send notification



### Step 3

## Request Buyer Information Manually (Optional)

Follow the below steps if you choose the "When requested" option.

i

Go to the **Sales Applicant**, **Sales Offer** or **Sales Progression** page.

ii

Locate the **Buyer Ready** card on the right-hand side. - (Sales Applicant, Sales Offer, and Sales Progression pages)

iii

Click **Send Request** to notify the buyer via email and push notification (if they have the app installed).

iii

Select which tasks you want to buyer to complete.



### Step 4

## Review and Process Submitted Information via the Buyer Ready Card

Once buyers submit their details:

i

**Compliance Checks:** Submit an identity check via the Landmark AML integration.

ii

**Proof of Funds:** Review purchase method, deposit amount, mortgage details, and supporting documents. Mark as accepted if satisfactory.

iii

**Solicitor Details:** Verify and save the solicitor's information to your records.

Once all steps are completed, send to your sales progressor with a single click, letting them know all the information is ready to go.

# Align your team on the new process.

Hold a short briefing with negotiators, branch managers, and sales progressors to explain:

## What Buyer Ready does

It collects key buyer documents and details (AML, ID, proof of funds, solicitor info) via a digital checklist in the buyer's Client App.

## How to use it [manual or automatic trigger]

You can set it to trigger automatically when an offer is accepted, or choose to send it manually for specific buyers.

## Where to track buyer progress

Buyer progress is visible in Street.co.uk, allowing you to see what's complete and what's outstanding.

## Why it helps everyone move faster

By cutting out repetitive admin back-and-forth, gathering all documents up front, centralising them in one hub, and giving you and the team clear visibility, Buyer Ready lets you accelerate sales progression with confidence.

# FAQs.

## **? Is Buyer Ready difficult to set up?**

No. It's already live in [Street.co.uk](https://www.street.co.uk) and enabled in your account. You can edit your Buyer Ready settings at any time [here](#)

## **? Can I see what documents the buyer has submitted?**

Yes. You can track their progress and see submitted documents directly within [Street.co.uk](https://www.street.co.uk).

## **? Does Buyer Ready add more admin?**

No. It reduces admin by automating key requests and tracking buyer progress all in one place.

## **? What if buyers don't complete their checklist?**

Buyers receive automated reminders, and agents can follow up directly from within the CRM.

## **? Can I choose when to trigger it?**

Yes. You can automate the checklist to send at the point of offer made, offer accepted, or choose to send it manually when it fits your workflow.

# Next Steps

i

Set your preferred Buyer Ready criteria in your Street.co.uk settings

ii

Share this guide with your team

## Additional support and resources.



For more detailed instructions, read the dedicated [help guide](#).



Need a personalised walkthrough? Contact your Customer Success Manager.



Not using Street.co.uk yet but like what you see? [Book a demo](#).