



# TRealty CRM

**Real Estate Sales Management**

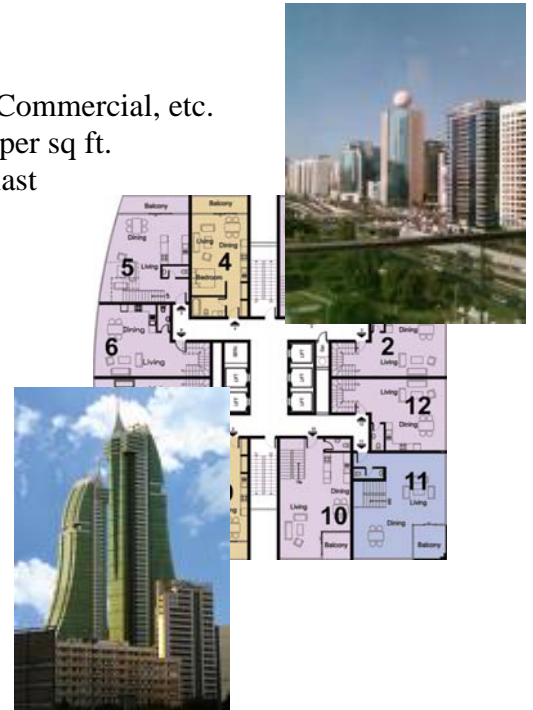
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# FUNCTIONAL SUMMARY

## Property Management

- **Store Property Unit Details**
  - Supports Project/Property/Unit hierarchy
  - Link to Escrow account if required
  - Supports multiple property types like Residential, Commercial, etc.
  - Security driven access to sensitive fields like Rate per sq ft.
  - Manage selective release – release premium units last
  
- **Upload documents**
  - Store images /photos of layout
  - Store floor plans for units
  
- **Update construction milestones**
  - Default Payment plan linked to a property
  - Support for Construction linked payment plan



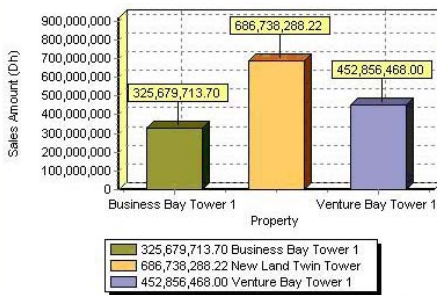
Property Name	Wing No	Name	Gross Area (Sq.ft)	Net_Area(Sq_Ft)	Sellable_Area(Sq_Ft)	Rate Per SqFt (Dh)	List Price (Sq Ft) (Dh)	Stage
Business Bay Tower 1		BBBT19	0.00	0.00	0.00	0.00	0.00	Available
		BBBTGround	0.00	0.00	0.00	0.00	0.00	Available
	A	BBBT01A	8,128.10	8,128.10	8,128.10	1,910.00	15,520,851.00	Sold
		BBBT02A	8,273.20	8,273.20	8,273.20	1,920.00	15,884,544.00	Sold

## First Sale – opportunity management

- Web enquiry to lead in CRM
- Check unit availability based on criteria
- Sell floors or units
- Generate payment plan
- Support temporary booking and auto-reversal
- Generate receipt for Booking advance
- Maintain availability status
  - Status like Available, Reserved, Booked, confirmed etc.
  - Automatic online update of status - so avoid double booking
- Generate contract



### Property wise Sales Overview



Property Name	Unit Name	Payment Start Date	Sellable Area(Sq ft)	Rate Per Sq Ft (Dh)	Selling Price (Dh)
Business Bay Tower 1	BBBT01A	01/11/2007	8,126.10	1,910.00	15,520,851.00
	BBBT01B	01/11/2007	8,365.70	1,910.00	15,978,487.00
	BBBT02A	01/11/2007	8,273.20	1,920.00	15,884,544.00
	BBBT02B	01/11/2007	8,536.93	1,920.00	16,390,905.60
	BBBT0301A	01/11/2007	1,439.76	1,930.00	2,778,736.80

## Post Sale revisions

- Changes to Buyer or unit purchased or both
  - Reallocation of different unit
  - Transfer unit - one buyer to another
  - Buyback
  - Resale
  - Changes to Unit details – Area, number of parkings, additional investors
- Contract edits/modifications/deletions with security

## Receivable Management

- **Receivable Followup**
  - Produce ageing report
  - Dynamic ageing if linked to construction milestones
  - By Customer by property
  - Auto emails for followup

### Unit Wise Installment Details

Property Name [Business Bay Tower 1]

Property Name	Unit ID	Company	Person	Installment No	Due Date	Amount (Dh)	Received Amount (Dh)	Balance Amount (Dh)	Status
Business Bay Tower 1	BBB701A	V Gate Ltd.	Rainer Regnery	1	01/11/2007	776,042.55	776,042.55	0.00	Received
		V Gate Ltd.	Rainer Regnery	2	01/12/2007	1,552,085.10	1,552,085.10	0.00	Received
		V Gate Ltd.	Rainer Regnery	3	04/02/2008	1,552,085.10	1,540,300.45	11,784.65	Due
		V Gate Ltd.	Rainer Regnery	4	31/07/2008	1,552,085.10	0.00	1,552,085.10	Due
		V Gate Ltd.	Rainer Regnery	5	31/08/2008	1,552,085.10	0.00	1,552,085.10	Due
		V Gate Ltd.	Rainer Regnery	6	30/11/2008	1,552,085.10	0.00	1,552,085.10	Not Received
		V Gate Ltd.	Rainer Regnery	7	31/01/2009	1,552,085.10	0.00	1,552,085.10	Not Received
		V Gate Ltd.	Rainer Regnery	8	31/03/2009	1,552,085.10	0.00	1,552,085.10	Not Received
		V Gate Ltd.	Rainer Regnery	9	31/05/2009	1,552,085.10	0.00	1,552,085.10	Not Received
		V Gate Ltd.	Rainer Regnery	10	31/12/2009	2,328,127.65	0.00	2,328,127.65	Not Received
<b>Group Total - Unit ID</b>						<b>15,520,851.00</b>	<b>3,868,428.10</b>	<b>11,652,422.90</b>	

- **Collection Management**
  - Bulk or individual payments
  - Register PDC details
  - Issue Receipts
  - Allocation of bulk receipts

- **Pay Commissions to Agents**

- **Pay Premium to Owners**

- **Adjustments to Installments**

## Broker Management

- **Maintain Contact details, addresses**
  - Brokerage Contract renewal followup
- **Upload documents**
  - Store contract copies
  - Upload availability list centrally for email
- **Broker Commission Management**
  - Calculate commissions payable
  - Disbursement plan for commissions



Panoply Technologies

### Agency Commission Report

Agency Company	Property Name	Unit Name	Deal Sheet Number	Deal Sheet Number	Type	Sellable Area(Sq ft)	Rate Per Sq Ft (Dh)	Selling Price (Dh)	Due Date	Amount (Dh)	Paid Stat
121 Real Estate Brokers	New Land Twin Tower	NLTT0102B	D00612	D00612	Sale	1,334.71	1,350.00	1,801,858.50		18,018.50	Not Paid
				D00612	Sale	1,334.71	1,350.00	1,801,858.50		18,018.50	Not Paid

## Feedback and Complaint Management

- Link to call centre
- Auto pickup of call and customer info
- Holding statement by customer visible
- Create service tickets
- Notification and Escalation management
- 360 degree view of customer



## Integrated Marketing Campaign Management

- Campaigns linked with property launch
- Link leads to campaigns for ROI Reports
- Integration to Call Centre /support for CTI
- Support for Outbound call distribution to agents
- Mass mailing/merging with standard templates



## **FORMS LIBRARY**

1. Deal Sheet
2. Payment Schedule
3. Property Sales Agreement
4. Booking Agreement
5. Resale Acknowledgement Letter
6. Acknowledgement Letter
7. Release Letter
8. Clearance Letter
9. Receipt

## **REPORTS IN ADDITION TO STANDARD REPORTS**

1. Reservation Summary/Expiry Report
2. Booking Summary/Expiry Report
3. Cheque Details
4. Collection Report
5. Consultant wise Sales Report (Graph)
6. Receivables Report
7. Unit wise Installments Details
8. Property wise sales overview
9. Resale Frequency
10. Unit Availability
11. Sales report (Original sales, Resale)
12. Agency Commission Report
13. Agency wise Sales Report (Graph)
14. Staff Commission report
15. Report of Resale Acknowledgements, Cancellations, Buyback