



Real Estate Leasing Made Easy

Powered by Sage CRM



EXECUTIVE SUMMARY

- **Comprehensive web based end-to-end Solution for Real Estate Companies**
- **Dashboard showing Key Performance Indices and alerts**
- **Maintain high occupancy by managing rental enquiries to ensure timely action**
- **Register Tenant details and occupant details to ensure effective communication**
- **Manage Rental negotiations with approval workflow**
- **Creating a Tenancy Contract from enquiry**
- **Manage parking/access cards**
- **Integrated customer care module for complaints / maintenance requests management – with approval workflow and status dashboard**
- **Renewal of Contract,**
- **Extension of Contract**
- **Vacate Building Process**
- **Post dated Cheque Mgmt in CRM and posting to integrated Sage 300 ERP**
- **Sage E-Marketing**



INTEGRATED SOLUTION

Optional Integrations:

- **Integration to Web (Web Lead)**
- **Integration to Email Gateway – Sage E-marketing**
- **Integration to Backend ERP**
- **Custom component option for BTU upload, billing and receipt management**
- **Integration through XML output to External Portals like DuBizzle Property Finder etc.**

NEW TENANCY

- Register lease enquiries including preferences
- Register lease enquiries including preferences
- Web-to-lead can be enabled.
- Assign enquiries to specific Agent or re-assign to different Agent
- Search database for available property/apartment based on the inquiry criteria.
- Can attach electronic documents or pictures to each unit / property for ease of use by Agent.
- Send email to prospect from within Sage CRM and effectively manage communications, negotiations, approval etc.
- On acceptance by prospect, manage booking advance with time limits.

ENQUIRY SCREEN

Sage CRM  Find: Units

- Recent
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 -  Team CRM
 -  Cheque Management
 -  Reports
 -  Crystal Report
 -  Marketing
 -  Log Off

Find

Property: Unit No.: Status: Unit View:

Type:

--No Search-- 

 Find

 Clear

322 Units, Page 1 of 22 Go to page 

Property	Unit No.	Floor	Status	Type	Unit View	Area(sq ft)	Rate/sq ft.	Annual Rent (Dh)	BTU Meter #	DEWA Meter #	Effective Date	Current Opportunity
Test-AL HANAA CENTER	HANC-101	1	Reserved	Showroom	Facing Seaside	1,000.00	80.00	80,000.00			01/03/2013	000060-HANC-101
Test-AL HANAA CENTER	HANC-102		Reserved	Showroom		900.00	100.00	90,000.00				000061-HANC-102
Test-AL HANAA CENTER	HANC-104		Occupied	Showroom		1,000.00	30.00	30,000.00				000010-HANC-104
Test-AL HANAA CENTER	HANC-105		Occupied	Showroom		10.00	20.00	200.00	1			000014-HANC-105
Test-AL HANAA CENTER	HANC-103		Occupied	Showroom		2,000.00	70.00	140,000.00	45908989			000013-HANC-103
Test-AL HANAA CENTER	HANC-P101	G	Occupied	Parking	Facing Road	100.00	100.00	10,000.00				
Test-AL HANAA CENTER	HANC-P001	GROUND	Occupied	Parking		100.00	10.00	1,000.00				
Test-Hamrain Center	HAMC-101		Maintenance	Showroom	Facing Road	800.00	75.00	60,000.00	65889787		01/03/2013	000011-HAMC-101
Test-Hamrain Center	HAMC-P102	1	Vacant	Parking		10.00	100.00	1,000.00				
Test-Hamrain Center	HAMC-P01	B	Vacant	Parking		150.00	35.00	5,250.00				

MANAGE BOOKING PROCESS

- **Define threshold period – say 2 days and automatically clear booking if collection confirmation is not confirmed (Optional).**
- **Ensure key required documents or information is collected by designating mandatory fields.**
- **Mandatory fields can be maintained/ added by admin user at anytime.**
- **Generate lease contract from booking**
- **Maintain all communications centrally against each enquiry.**
- **Record all relevant details such as details of tenant as well as occupant.**

TENANCY DETAILS

Sage CRM



Opportunity: 000063-Hana-Shop No. 115
Company: M/s Al Khalil United General Trading
Person: Qais Salim Hilal Al Khalil

Phone: 971 4 3390270

Sage 300 ERP Database ID: AGH DAT

- Recent
- Summary
- Contract**
- Receipt
- Terms & Conditions
- Addendums
- Parking Details
- Access Cards
- Parking Invoice
- BTU Meter/Readings
- BTU Invoice
- Monthly Rental Income
- Monthly Parking Income
- Renewal
- Ext...

Main Menu

Administration



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New



My CRM



Team CRM



Cheque Management



Reports



Crystal Report



Marketing



Log Off

Contract Summary

Contract No.: Hana-00003	Contract Generated Date: 25/07/2013	Property: Al Hanaa Center	Unit: Hana-Shop No. 115
Date of Occupation: 01/09/2013	Grace Period (Days): 0	Contract Start date: 01/09/2013	Contract End date: 31/08/2014
			Contract Posted: <input checked="" type="checkbox"/>

Unit Details - (Area, Market Rate)

Area(sq ft): 995.00	Rate/sq ft.: 76.00	Annual Rent: Dh 75,915.00
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Other Details of Contract

Parking Space Details:	Documents:
Other Terms:	Other Charges Description:

Tenant Details

Tenant: M/s Al Khalil United General Trading 3390270	Contact Person (Tenant): Qais Salim Hilal Al Khalil 3390270	Occupant (Company): M/s Al Khalil United General Trading 3390270	Occupant (Individual): Qais Salim Hilal Al Khalil 3390270
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Rent Details

Agreed Annual Rent: Dh 100,000.00	Payment Terms: Full advance in 5 cheques	Other Charges: Dh 200.00	Net Amount: Dh 105,200.00
Total Rent: Dh 100,000.00	Security Deposit: Dh 5,000.00		

Contract Dates

1 Records Found

Line No	Contract Start Date	Contract End Date	Previous Rent (Dh)	Increase %	Increase Amt (Dh)	Rent (Dh)	No. of Cheques	Matched Amt (Dh)
1	01/09/2013	31/08/2014	0.00	0.00	0.00	100,000.00	Full advance in 5 cheques	100,000.00

Charges

2 Records Found

Line No	Date	Charges	Amount (Dh)	Matched Amt (Dh)
1	25/07/2013	Security Deposit	5,000.00	5,000.00
2	28/07/2013	Ijari fees	200.00	200.00

Payment Schedule

7 Records Found

Line No	Description	Cheque Date	Cheque Amount	Received Amt
1	1 Installment	01/09/2013	20,000.00	20,000.00
2	2 Installment	01/11/2013	20,000.00	20,000.00
3	3 Installment	01/01/2014	20,000.00	20,000.00
4	4 Installment	01/03/2014	20,000.00	20,000.00
5	5 Installment	01/05/2014	20,000.00	20,000.00
21	Ijari fees	01/09/2013	200.00	200.00
22	Security Deposit	01/09/2013	5,000.00	5,000.00

- Add Security Dep./Charges
- Preview Rental Agreement
- Preview Proposal

TENANCY RENEWAL

- **Assign new rent for all property/apartments separate from current rent.**
- **Or calculate new rent based on % increase on current rent.**
- **Generate / Send Renewal Letter and Reminder Email or letter.**
- **Dynamically schedule renewal letters 'x' number of days before expiry.**
- **Record tenant Acceptance or schedule cancellation of contract.**
- **On Renewal generate new tenancy contract with contract dates starting from the next day of current contract with expiry date extending to specified period.**
- **Once the new contract is created the previous contract expires.**

TENANCY RENEWAL



- Summary
- Contract
- Receipt
- Terms & Conditions
- Addendums
- Parking Details
- Access Cards
- Parking Invoice
- BTU Meter/Readings
- BTU Invoice
- Monthly Rental Income
- Month

Renewal Details

Renewal Terms & Conditions:
 1. It is agreed, however, that all terms of the Lease shall continue during this renewal period.
 2. This agreement shall be binding upon and shall inure to the benefit of the parties.

Renewed/Extended Cont. Ref.: -None selected-

Renewal Installment No.:

-  Change
-  Add Renewal Dates
-  Generate Installment Dates
-  Preview Renewal Contract

1 RecordsFound

Line No ^	Contract Start Date	Contract End Date	Previous Rent (Dh)	Increase %	Increase Amt (Dh)	Rent (Dh)	No. of Cheques
1	15/07/2013	14/07/2014	110,205.00	10.00	11,020.50	121,225.50	Full advance in 2 cheques

NoRecordsFound

Line No ^	Description	Cheque Date	Cheque Amount	Received Amt
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TENANCY EXTENSION

- **System provides an option to extend the tenancy contract if the tenants approaches for the same.**
- **Rent for the extended period is calculated & new tenancy contract in prepared with contract dates start date remaining the same & contract end date extended as per the tenants request.**
- **Once the new contract is created the previous contract expires and is archived as a closed contract.**

TENANCY VACATE PROCESS

- **Initiate vacate notice to tenant from Landlord or record vacate notice from Tenant**
- **Unit moves into the status of on-notice phase.**
- **Generate check list of assets/ vacate maintenance**
- **Calculate and generate final accounts.**
- **Once Tenant clears all utility charge bills for electricity, water, phone etc. Bill details are to be provided at the settlement time.**
- **On cancellation of the tenancy contract the property/apartment moves into the maintenance phase before releasing as vacant unit.**

VACATE DETAILS

Sage CRM



Opportunity: 000063-Hana-Shop No. 115
 Company: M/s Al Khalili United General Trading
 Person: Qais Salim Hilal Al Khalili

Phone: 971 4 3390270

Sage 300 ERP Database ID: AGHDAT

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Vacate Details

Vacate Notice date: 01/01/2014	Vacate Initiated by: Tenant	Date of Vacating: 16/01/2014	Maintenance Upto Date:
Contract Start Date (Current period): 01/09/2013	Contract End Date (Current period): 31/08/2014	Agreed Annual Rent: Dh 100,000.00	Agreed Rent (Current Period): Dh 100,000.00
Vacate Entry Posted: <input type="checkbox"/>			

 Preview Vacate Sett

Amount Details

No. of Days Occupied: 138	Actual Rent Due (A) Dh 37,808.22	Rent Chqs Collected/Realised (B) Dh 0.00	Rent Refund (C = A-B) Dh 0.00	Rent to be Collected/Realised (D = A-B) Dh 37,808.22
BTU Invoice Due (E) Dh 0.00	Parking Invoice Due (F) Dh 0.00	Other Charges/Penalties (G) Dh 0.00	Other Dues (J) Dh 0.00	
PDCs to be Returned: Dh 0.00	Return Security Deposit (H) Dh 5,000.00			
Net to Refund (I = C+H-D-E-F-G-J) >0 Dh 0.00	Net to Collect (I = C+H-D-E-F-G-J) Dh 32,808.22			

Contract Dates

1 Records Found

Line No	Contract Start Date	Contract End Date	Previous Rent (Dh)	Increase %	Increase Amt (Dh)	Rent (Dh)	No. of Cheques	Matched Amt (Dh)
1	01/09/2013	31/08/2014	0.00	0.00	0.00	100,000.00	Full advance in 5 cheques	100,000.00

Other Charges

1 Records Found

Line No	Charges	Amount (Dh)	Matched Amt (Dh)
1	To be Collected	32,808.22	0.00

Refunds

No Records Found

L.No.	Charges	Amount (Dh)	Matched Amt (Dh)
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PDCs to be returned

No Records Found

Mode of Payment	Cheq No./Bank Trf No./Cash Ref.	Cheq Dt/Bank Trf Dt	Cheq. Amt/Bank Amt/Cash Amt (Dh)	Customer Bank	Cheque Status	Deposit Bank	Matched Amt (Dh)	Posted	Realised
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Done



Internet | Protected Mode: Off



95%

CHEQUE MANAGEMENT

- When Tenancy Contract is confirmed all the cheque are moved into the Cheque Master model with initial 'Received' status.
- Multiple Queues are provided for All Received Cheque, Deposited Cheque, Current Month Cheque etc., with search option.
- Option to send cheque through different stages like Deposit, Discount, Realize, Reject, Bounce, Cheque on Hold, cancelled etc.
- Report option for the Cheque, against Property, Unit, Tenant name are incorporated.
- Option for Replacement of the Cheque with the new one is provided.

DEPOSITED CHEQUES



Opportunity: 000063-Hana-Shop No. 115
 Company: M/s Al Khalili United General Trading
 Person: Qais Salim Hilal Al Khalili

Phone: 971 4 3390270

Sage 300 ERP Database ID: AGHDAT

Cheque-Deposited | Cheque-Management | Cheque-Realisation Posting | ...

Receipt No. : Receipt Date :  Cheque No. : Cheque Date : 
 Cheque Amount : Customer Bank : --Select-- Cheque Status : Received ▾

 Show Cheque List

Enter Deposit Details

Deposit No. : Deposit Bank : Dubai Islamic Bank Deposit Date : 

 Update Cheque Status

Cheques List

Line No.	Receipt No.	Receipt Date	Chq. No.	Chq. Date	Chq. Amt (Dhs)	Customer Bank	Deposit No.	Deposit Date	Deposit Bank	Chq. Status	New Status
1	000144	21/08/2013	2503264	01/01/2014	8000.00	Dubai Bank			Dubai Islamic Bank	Received	--Select-- ▾
2	000151	24/08/2013	56416	01/11/2013	12500.00	Habib Bank Ltd.			BBAC Beirut LIRA Account	Received	--Select-- ▾
3	000151	24/08/2013	87916516	01/01/2014	12500.00	InvestBank PLC			Dubai Islamic Bank	Received	--Select-- ▾
4	000151	24/08/2013	78946546	01/03/2014	12500.00	Dubai Bank			Dubai Islamic Bank	Received	--Select-- ▾
5	000158	29/08/2013	13245	01/11/2013	18000.00	First Gulf Bank			Dubai Islamic Bank	Received	--Select-- ▾
6	000158	29/08/2013	123415	01/01/2014	18000.00	First Gulf Bank			Dubai Islamic Bank	Received	--Select-- ▾
7	000158	29/08/2013	3241234	01/03/2014	18000.00	First Gulf Bank			Dubai Islamic Bank	Received	--Select-- ▾
8	000145	21/08/2013	234134	01/05/2014	8000.00	InvestBank PLC			Commercial Bank of Dubai - Mohd Saeed Al Gaith	Received	--Select-- ▾

MANAGE CHEQUES



Opportunity: 000063-Hana-Shop No. 115

Phone: 971 4 3390270

Company: M/s Al Khalili United General Trading

Sage 300 ERP Database ID: AGHDAT

Person: Qais Salim Hilal Al Khalili

Cheque-Deposited **Cheque-Management** Cheque-Realisation Posting ...

Receipt No. : Receipt Date :  Cheque No. : Cheque Date : 
 Cheque Amount : Customer Bank : --Select-- Cheque Status : --Select--
 Deposit No. : Deposit Bank : --Select-- Deposit Date : 

 Show Cheque List  Update Cheque Status

Cheques List

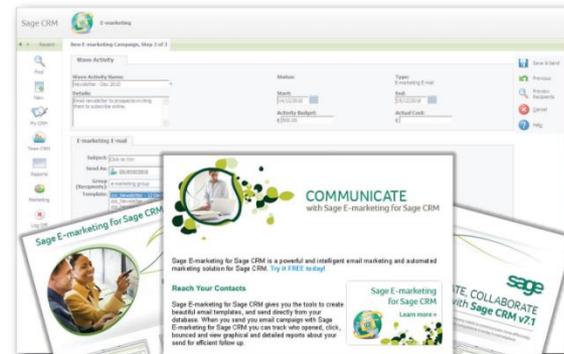
Line No.	Receipt No.	Receipt Date	Chq. No.	Chq. Date	Chq. Amt (Dhs)	Customer Bank	Deposit No.	Deposit Date	Deposit Bank	Chq. Status	New Status	Realisation Date
1	000151	24/08/2013	132456	01/09/2013	12500.00	Al Hilal Bank	00001	01/09/2013	Abu Dhabi Islamic Bank	Realised	--Select-- <input type="text"/>	01/09/2013
2	000156	24/08/2013	213468	01/10/2013	65000.00	Habib Bank Ltd.	00001	01/10/2013	Dubai Islamic Bank	Realised	--Select-- <input type="text"/>	01/10/2013
3	000158	29/08/2013	1234	01/09/2013	18000.00	First Gulf Bank	0001	01/09/2013	Dubai Islamic Bank	Realised	--Select-- <input type="text"/>	01/09/2013

CUSTOMER CARE

- **Record complaints / Maintenance request and issue case reference**
- **Activate workflow and assign case for inspection, rectification etc.**
- **Record completion of case**
- **Maintain log of all cases by tenant, by property unit.**

E-MARKETING

- Simple 3-step wizard for rapid campaign execution
- Over 90 attention-grabbing templates available out-of-the-box
- Editable templates that can be personalised quickly and easily
- Rapid creation of groups from segmented prospects and customer lists
- Smart-sending features
- Automated drip marketing campaigns
- Open, click and bounce rate tracking
- Auto-feed of metrics into Sage CRM for rapid ROI calculation



Thank You !

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