REX DYNAMICS
REAL ESTATE APPS

Guide for REX Dynamics Real Estate App
Microsoft Dynamics 365
Solution version 2.3.0.0

1 Index

1.1 REX Versioning

Version	Date	Description
2.0.2.5	December 11, 2017	Updated version
2.2.0.7	January 24, 2018	Updated version

1.2 REX - Introduction

REX is the complete and cloud based solution for real estate investors and managers. REX is based upon Microsoft Dynamics 365. This quide describes the main functionality of REX and is not intended to describe the complete functionality of Microsoft Dynamics 365.

1.2.1 Access REX

REX can be accessed on these ways:

1. Using a browser (Internet Explorer, Edge, Chrome, Safari etc.)
2. Using the Outlook Client (with the full Dynamics 365 for Outlook client)
3. Using the Outlook Client and Outlook Online (with the CRM lightweight app)
4. Using Mobile Clients like Tablets and Smartphones (via the Dynamics 365 App or Mobile browser)

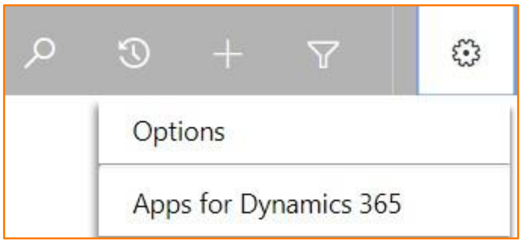
To access REX for Dynamics 365 from a browser, the URL of the Dynamics 365 instance needs to be filled. REX will be opened on the page determined in the user's Personal options.

To use the complete REX functionality in the familiar Outook (client) interface, the Microsoft Dynamics 365 for Outlook client needs to be installed. See https://technet.microsoft.com/enus/library/mt826557.aspx for more information.

The Microsoft Dynamics 365 App for Outlook can be used to view Microsoft Dynamics 365 information and track emails from within Outlook on your desktop and phone. See https://technet.microsoft.com/library/mt812179.aspx for more information.

The Dynamics 365 Apps for Phones and Tablets can be downloaded using the appstore for the (mobile) device.

More information can be found in the User Settings – Apps for Dynamics 365.



** Before users can access REX for Dynamics 365 they need to have a Dynamics 365 license associated to their useraccount in Office 365. After that, the user needs to have an security role in Dynamics 365.*

1.2.2 Modules and Groups

REX consists of the following main Modules and one main Group

- Sales : Module used for aquireing property or assocate contracts
- Service : Module used for maintaining property
- Tools : Module for reporting and analysis
- Settings : Base entities and users

2 Setup REX for first use

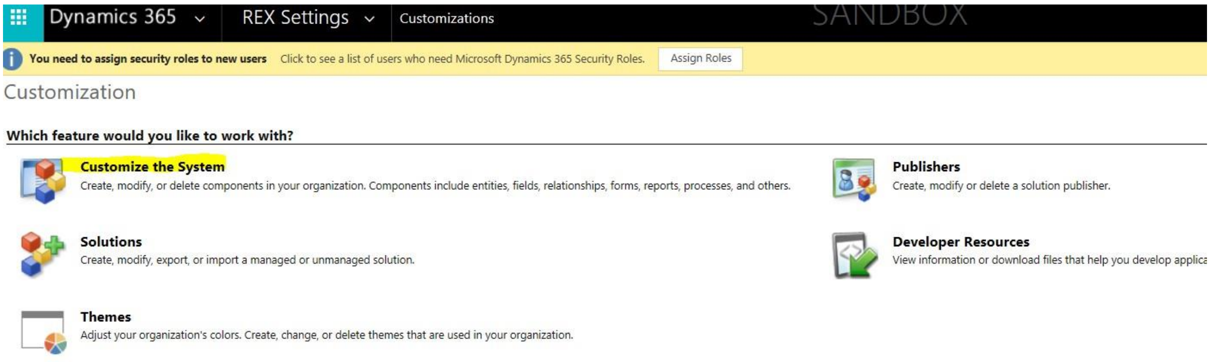
Before using REX a couple of settings needs to be done, these are:

1. Deactivate default sales processes
2. Assigning Security roles to users
3. Systemsettings
4. Personal options
5. Data in REX
6. Filling the Property Type entity

2.1 Deactivate default sales processes

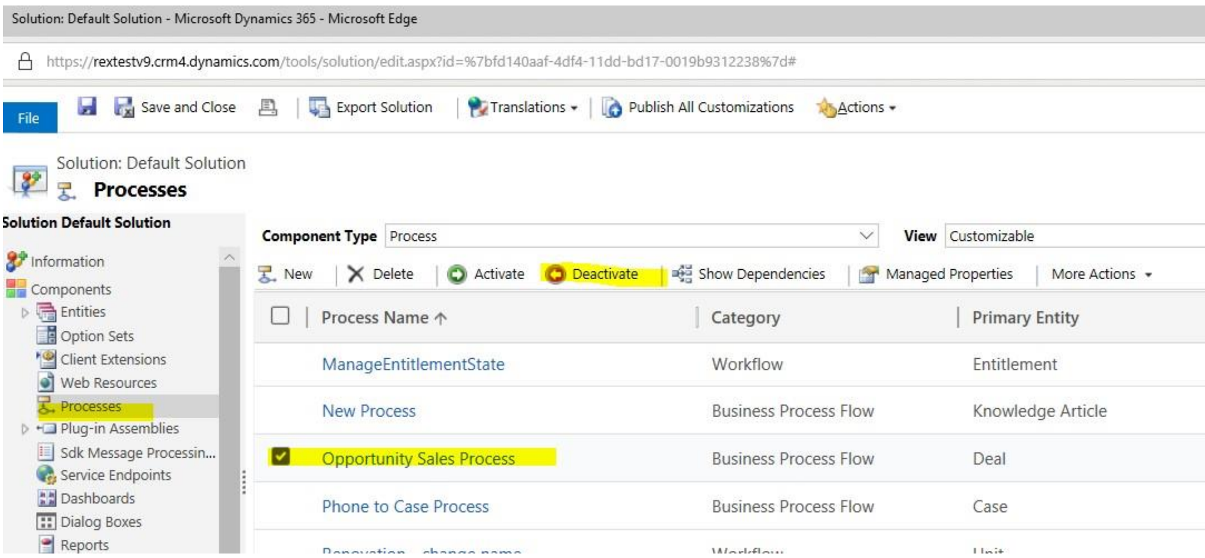
Go to Settings>Customizations

Select Customize the System

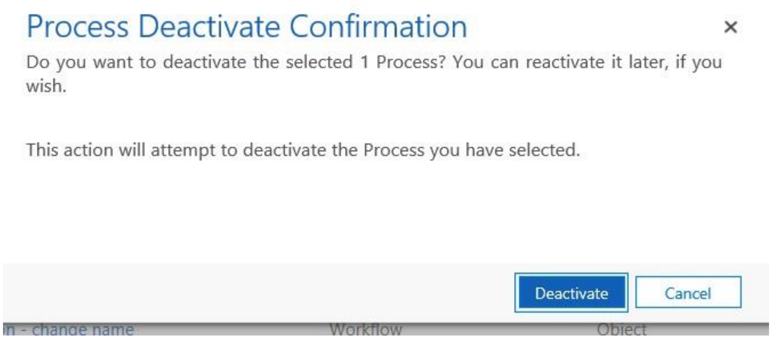


Select Processes

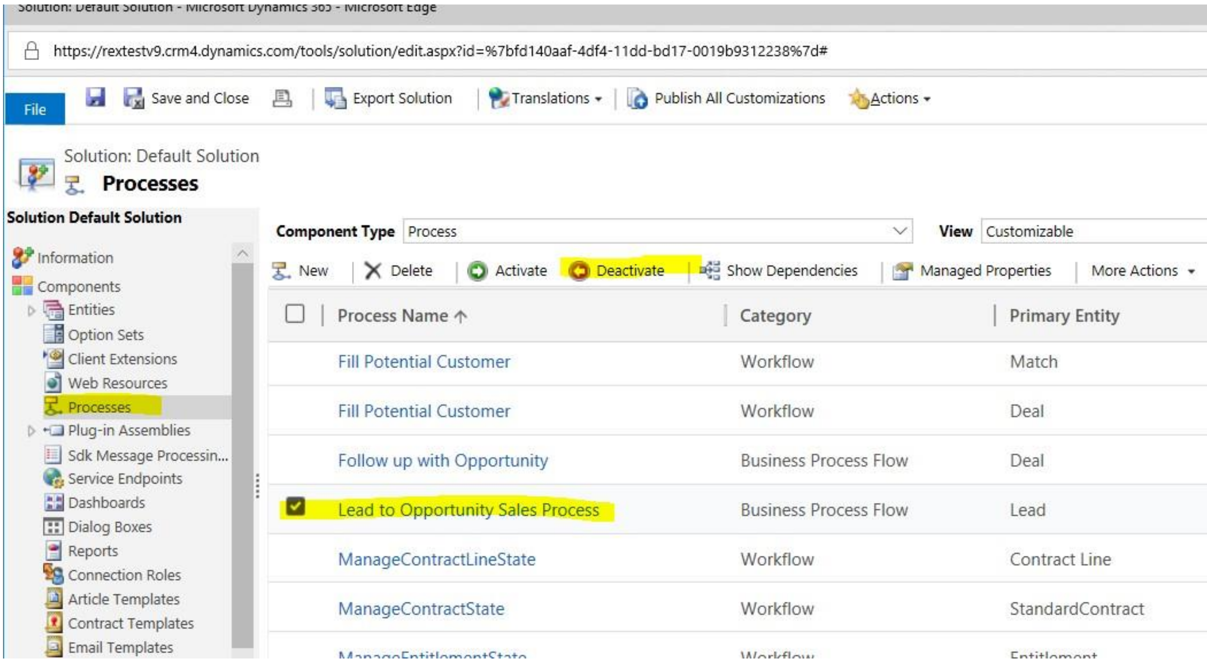
Select the Opportunity Sales Process and select Deactivate



Select Deactivate



Deactivate the Lead to Opportunity Sales Process in the same way as above.

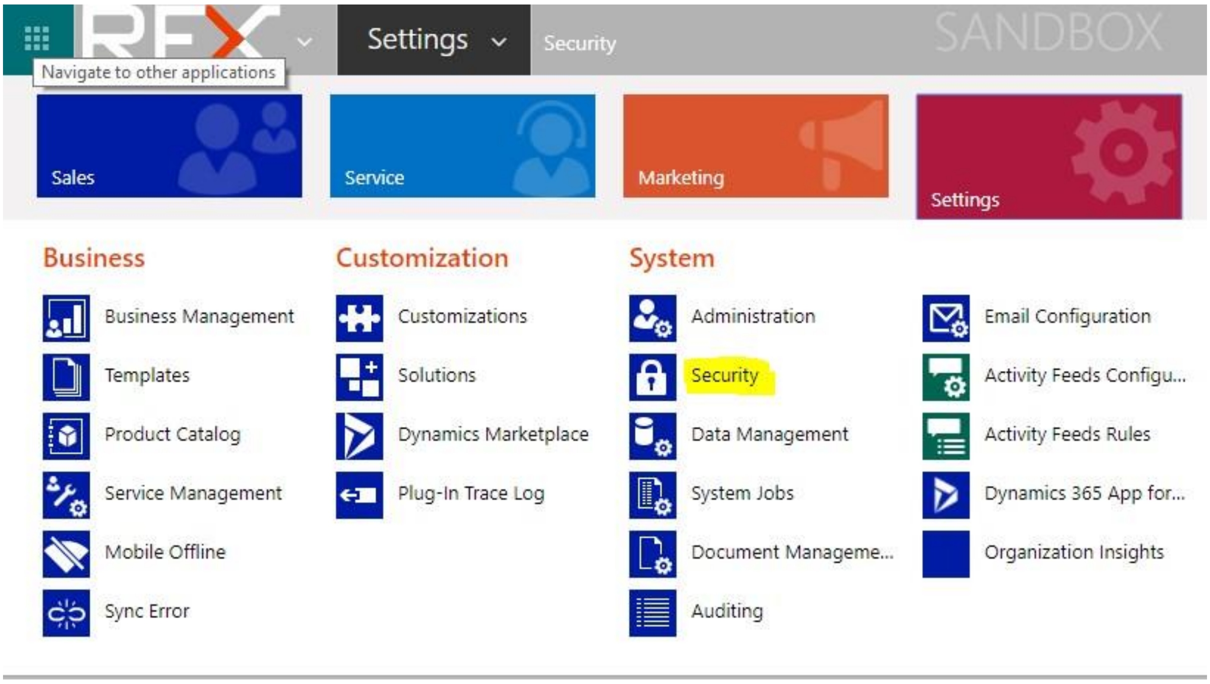


Now that the default processes are deactivated, the REX process can be used.

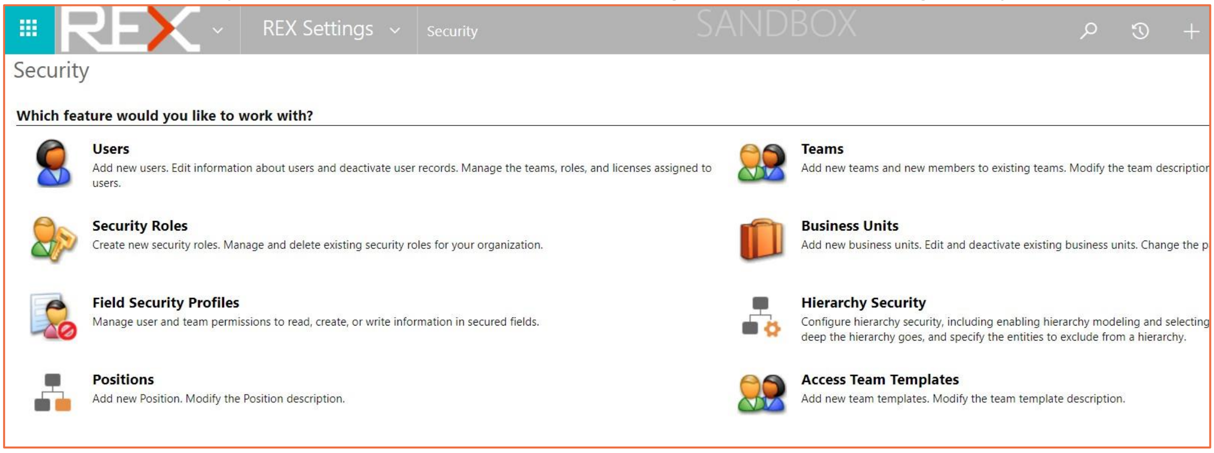
2.2 Assigning Security roles to users

Security in REX Dynamics is done with security roles. Before users can login to REX, one or more securityroles needs to be associated to these users. A minimum of one user must be of type systemadminstrator. This users has all the rights in REX.

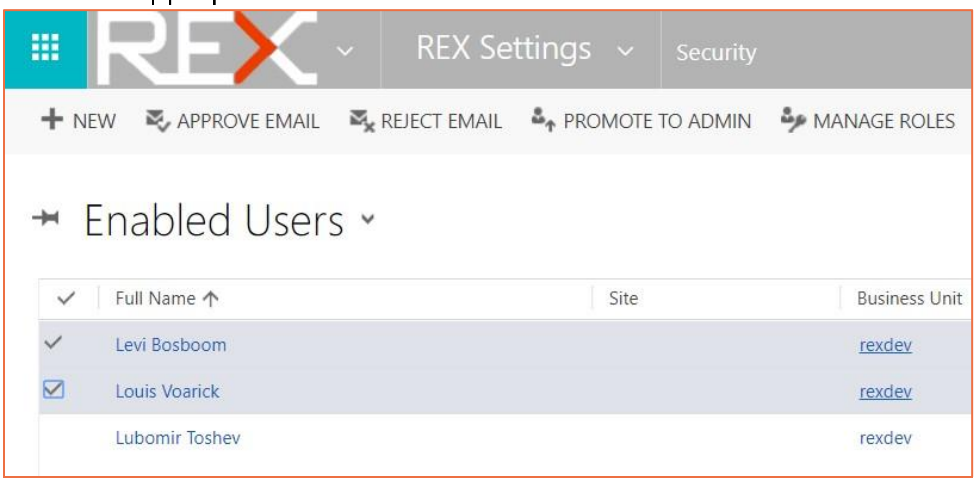
REX Dynamics comes with several out-of-the-box security roles and some specific REX security roles. The *Security Roles* and *Users* entities are accessed in the module REX Settings – Security.



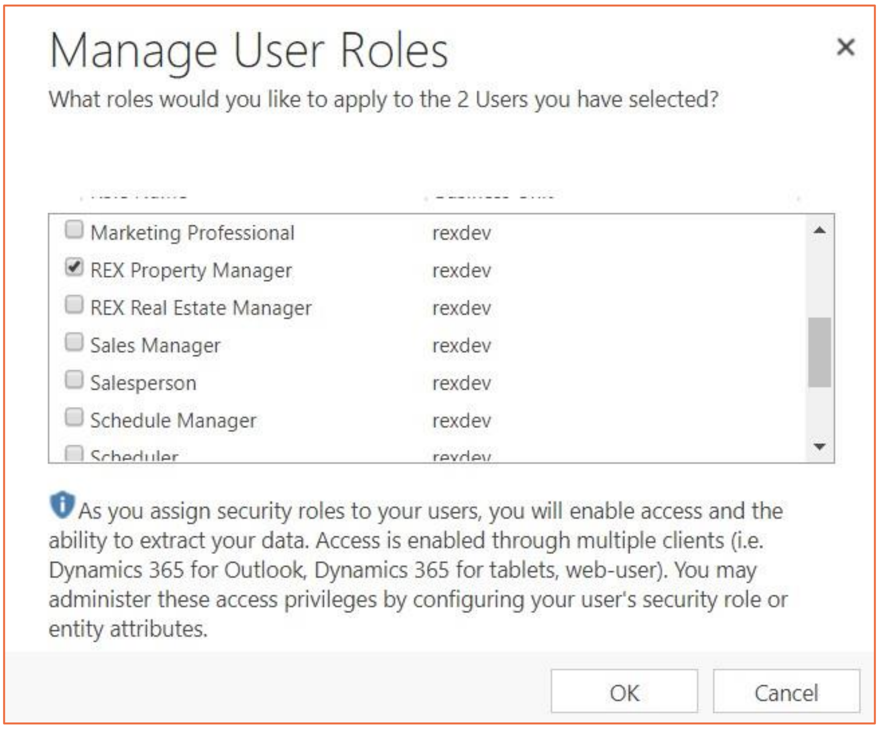
The person with system adminstator access can assign roles by selecting entity Users.



Select the appropriate user or users and click on button MANAGE ROLES.



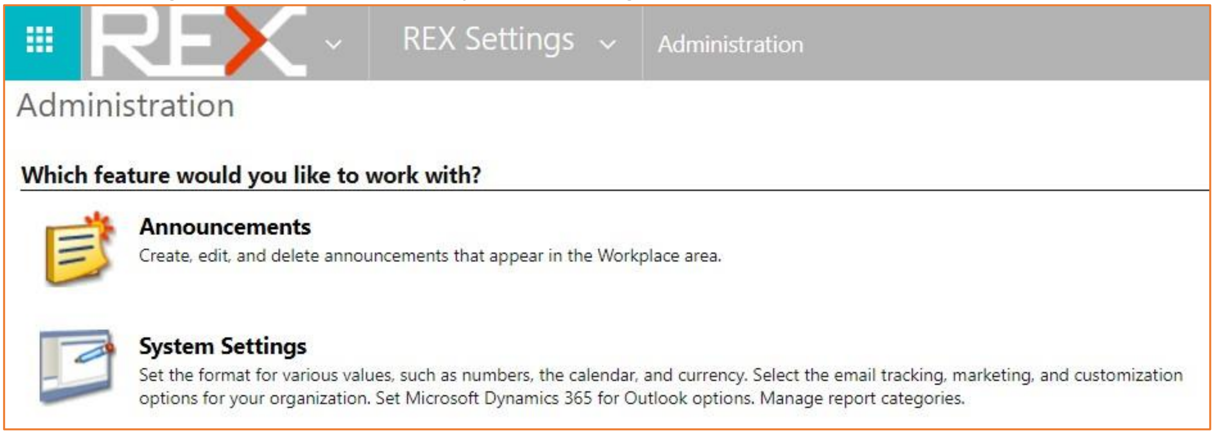
Select the appropriate role(s) and press on OK.



Now the users are able to login to REX by selecting the URL REX is installed upon.

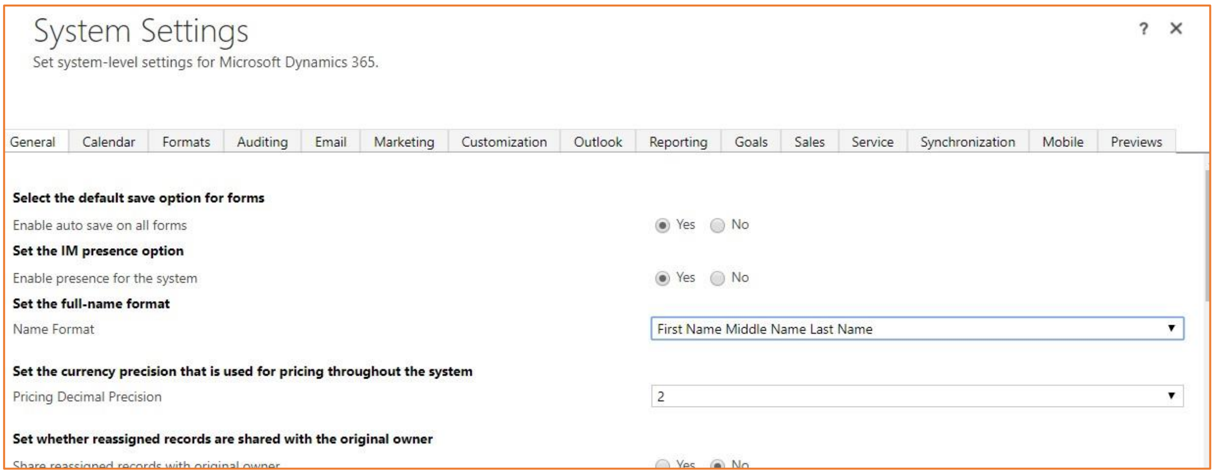
2.3 System Settings

In REX Settings – Administration – System Settings



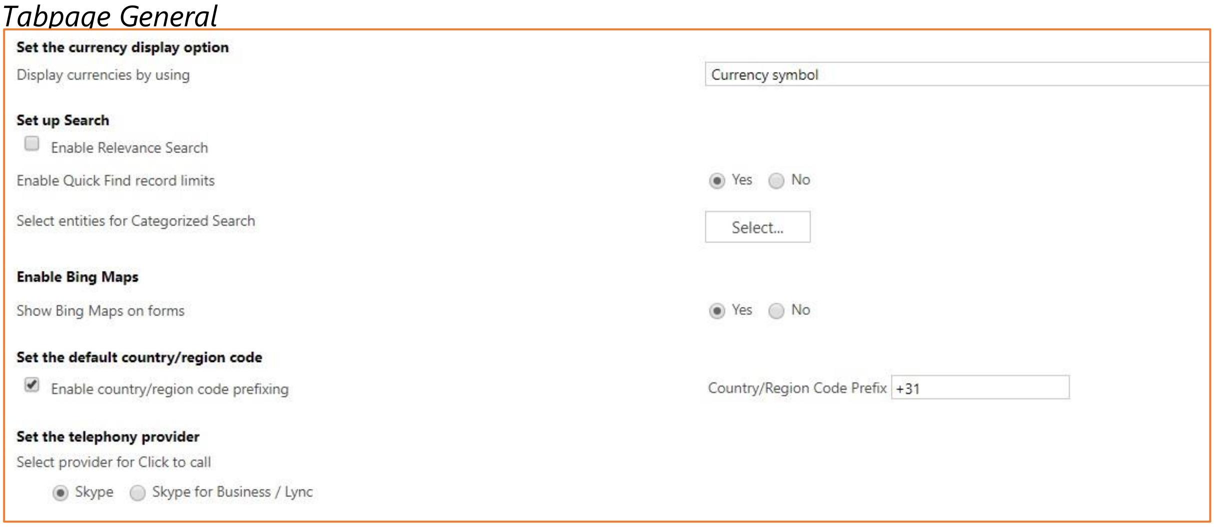
Before using REX it is recommded to check the System Settings.

Tabpage General



Name format determines how names of contacts and users are saved in REX. This can be changed if needed. Keep in mind that the change will only be applied on new records. Existing records will not be updated if the format is change. Best practice is to change the format before data entry/import.

Tabpage General



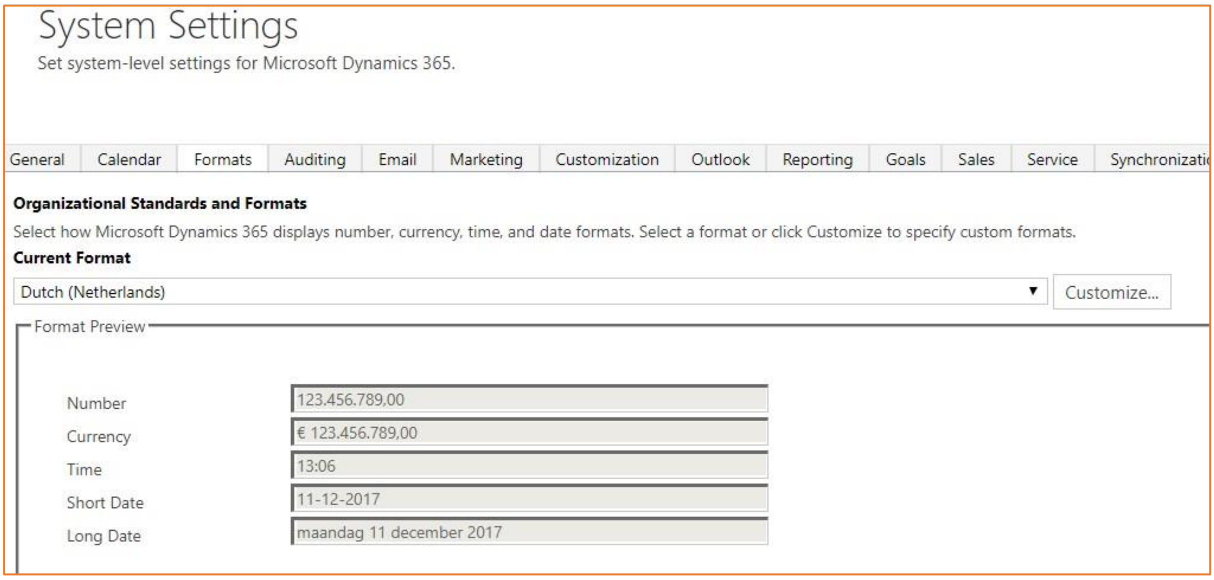
With button Select.. in set up Search section the entities which are searched upon in Global search can be selected.

Show Bing Maps on forms will show a Bing map on base entities accounts, contacts and leads.

Enable country/region code prefixing if enabled, which is the default, Dynamics REX will prefix the country/region code to numbers that users are trying to call.

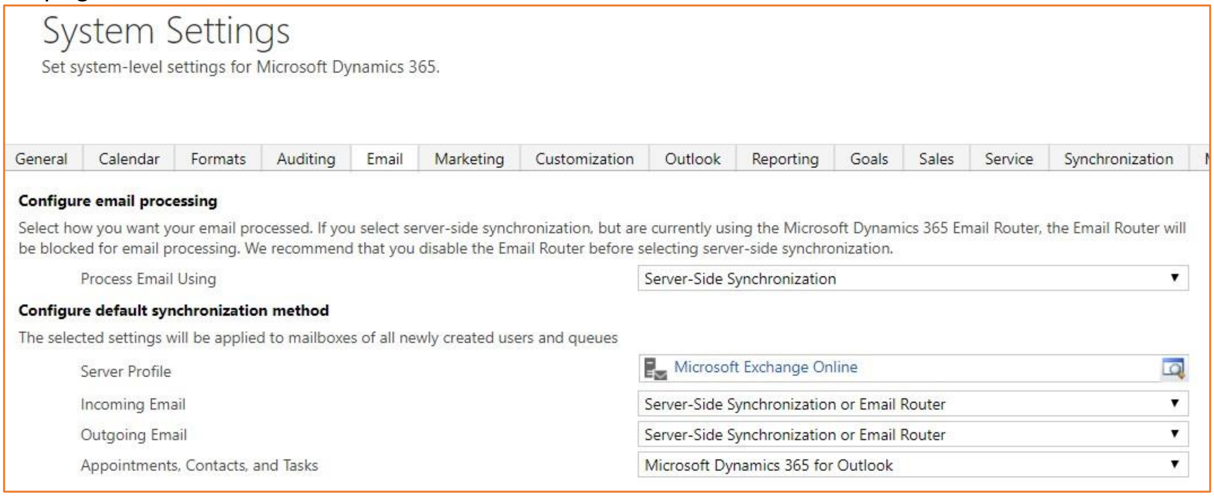
Select provider for Click to call. Choose which provider to enable outbound calls from within Dynamics 365. This setting doesn't apply to Dynamics 365 for tablets or Microsoft Dynamics 365 for phones.

Tabpage Formats

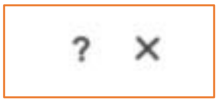


Select the Current Format for the localized settings.

Tabpage Email



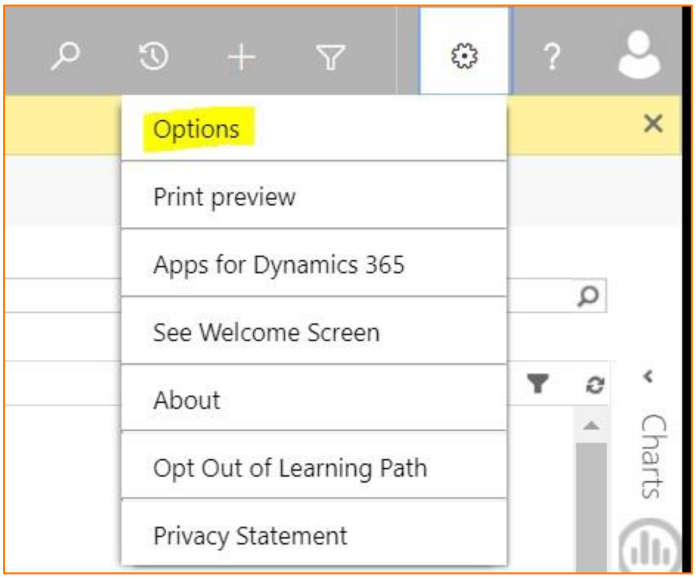
Selecy the default Server Profile to use and processing method between REX and Exchange.



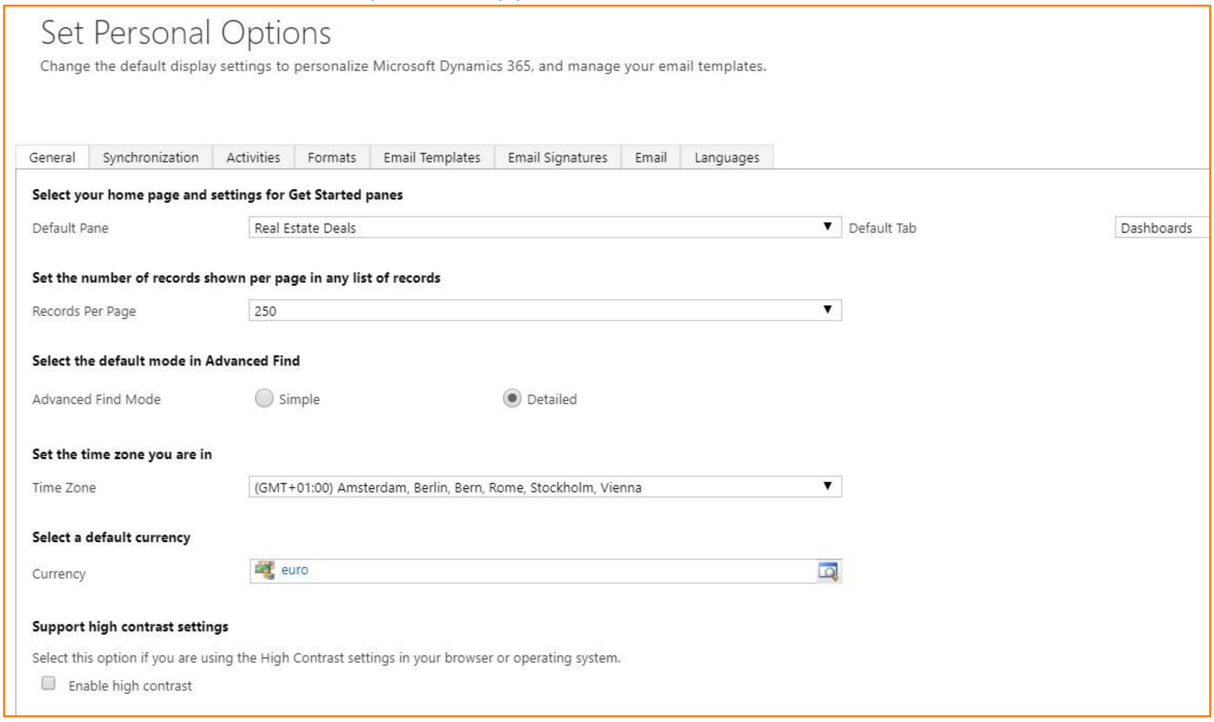
The Help ? functionality will give more information regarding these and other systemsettings.

2.4 Personal Options

The first (and one-time-only) thing to do when opening Dynamics 365 is to access the personal options. This can be achieved from the upper right side with the settings icon and then Options.



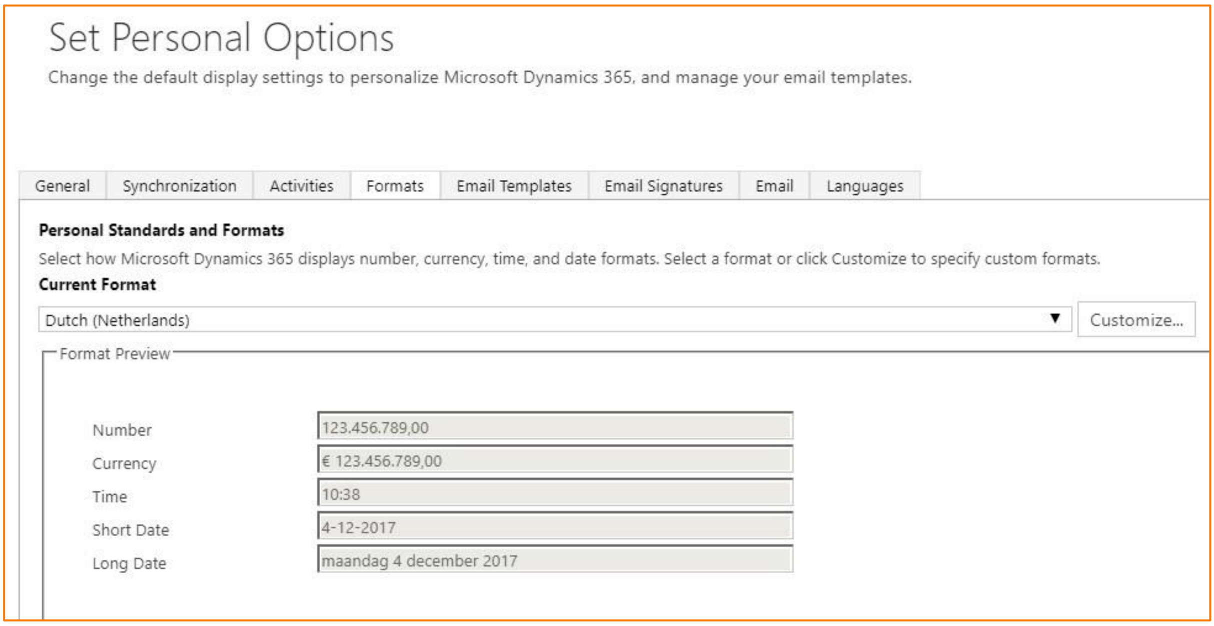
On tab page General The first setting that can be adjusted is the Homepage that is opened when REX is accessed. Default this will be determined based upon the security role, but users can change this to for example Default Pane Real Estate Deals and Default Tab Dashboards. Users can also select other options if applicable



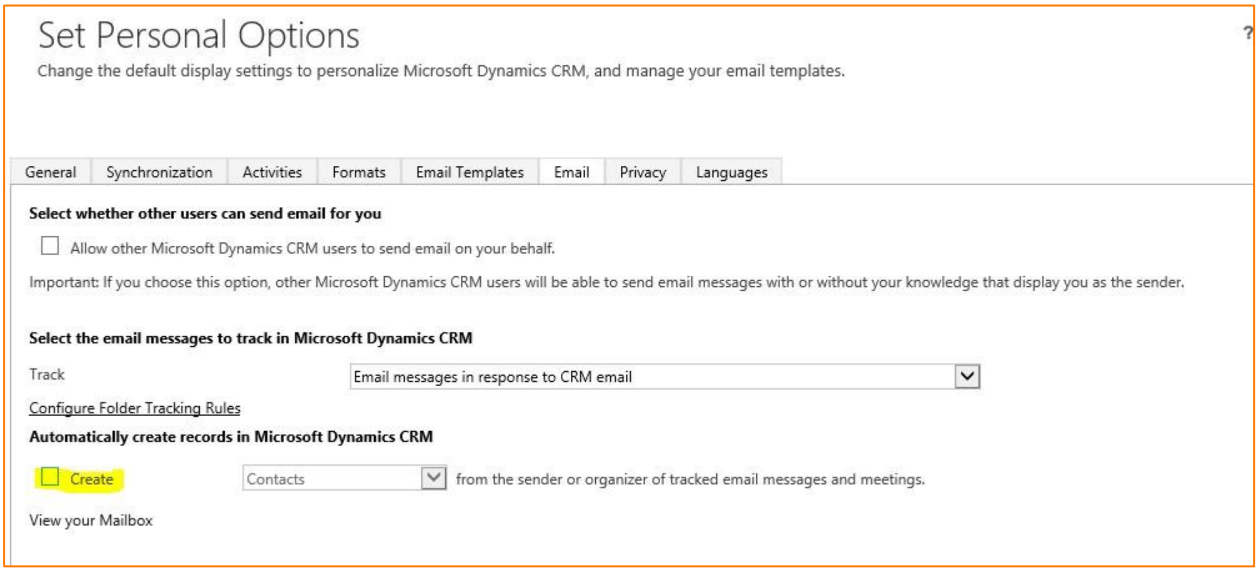
The second setting is the Records Per Page setting. We recommend setting this to 250. Now the maximum of 250 records will be shown for each list view in CRM for example the My Active Companies view.

Another setting to adjust is the default mode in Advanced Find. Set this option to Detailed.

On Tab Page Formats the Current Format can be set to the user's local country format. This will ensure that the appropriate format for certain fields (like numbers, currencies and date/time fields) is shown to the current user.

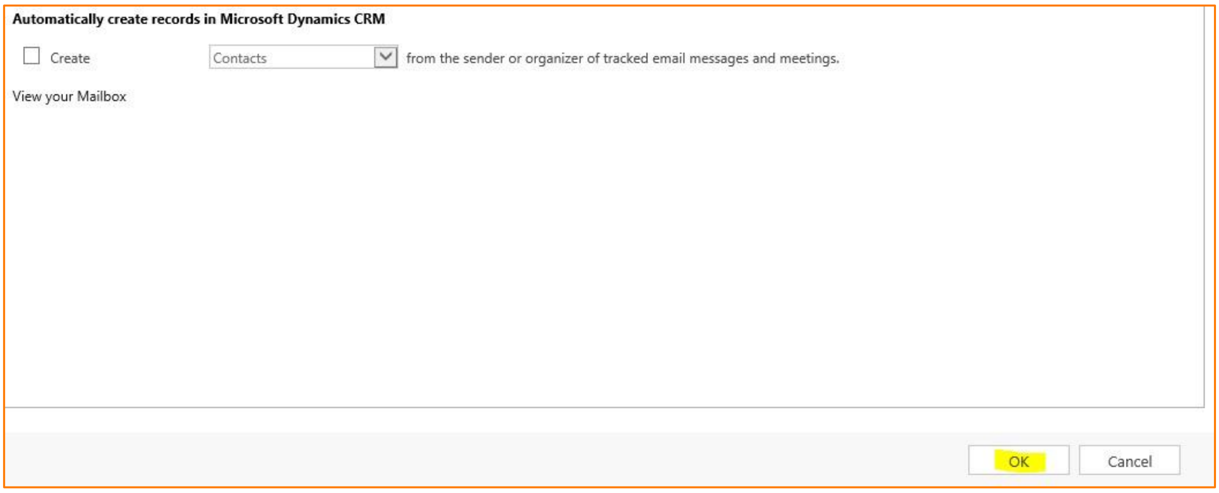


The last setting worth mentioning (and quiet important for CRM for Outlook users) is the Email tab page.



Here the Create checkbox needs to be de-selected (default it is selected!). Otherwise contacts will be automatically created in CRM for unresolved email addresses when an email is tracked to CRM.

This is undesired behavior.



After the personal options are changed, they can be saved by pressing button OK.

2.5 Data in REX

Data can be filled in REX in several manners:

1. Manually in REX
2. Using Import Templates
3. Using 3rd party middle ware tools (Scribe etc.) or by using custom API's.

The first two options are explained in this guide.

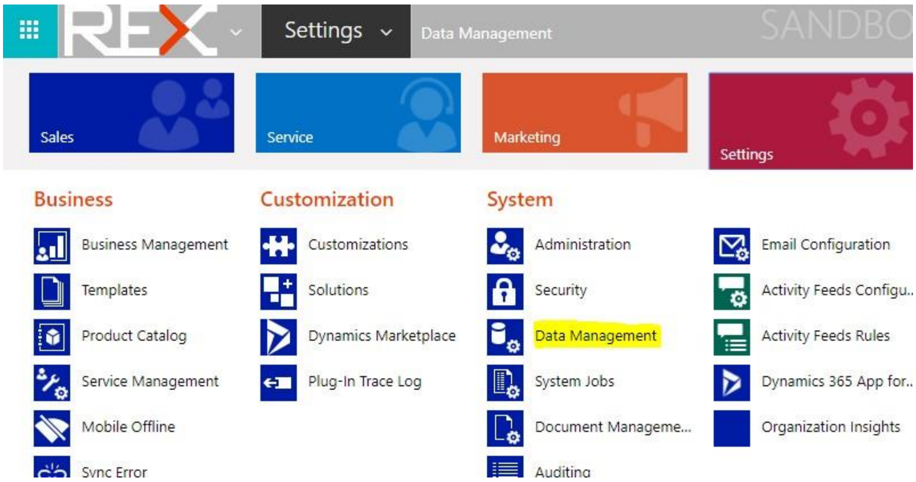
2.5.1 Filling data manually

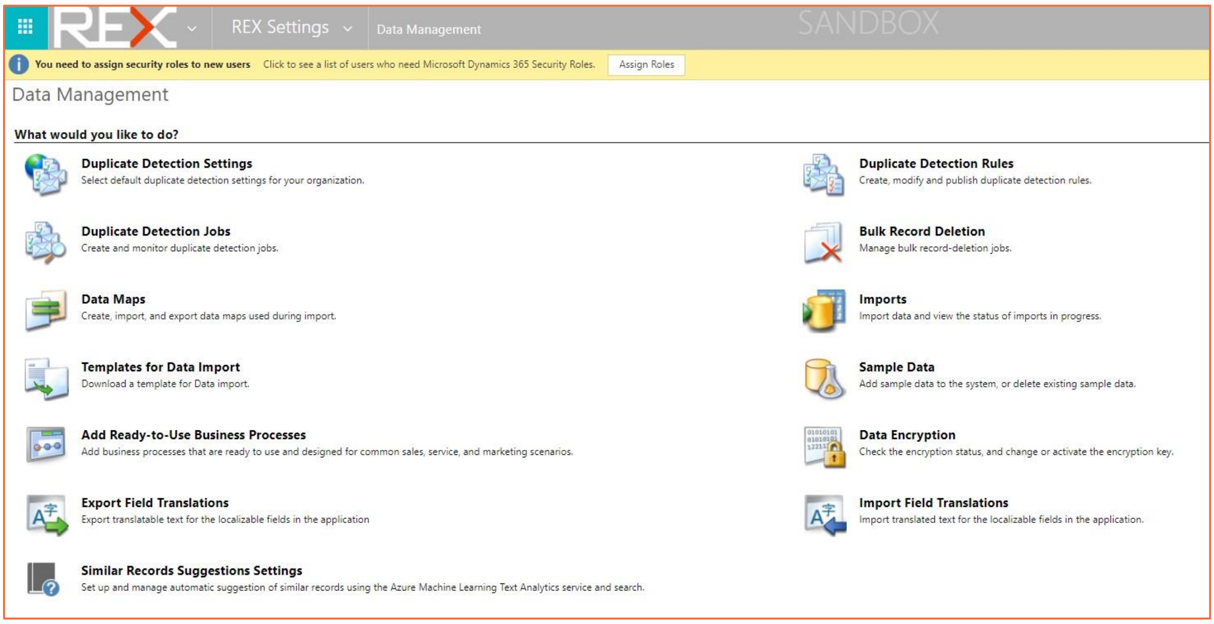
If there is no data needed for import, then data can be filled manually in the corresponding entities. Best practice is to first fill the data in the base entities Accounts, Contacts and Leads.

After the data in the base entities is available, data in dependent entities like Deals, Cases, Contracts, Objects and Units can be filled.

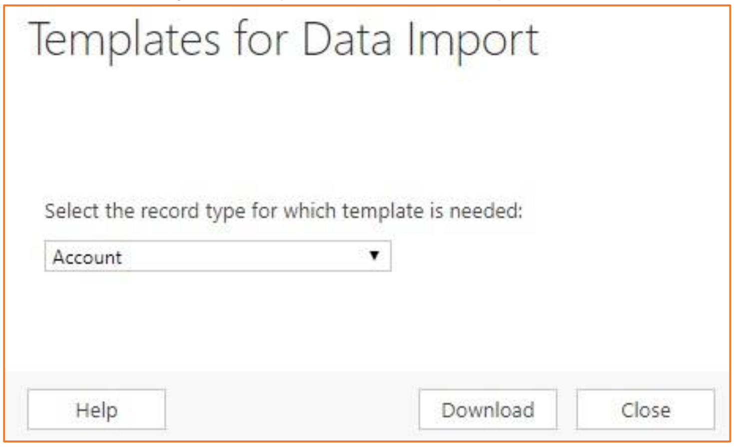
2.5.2 Using import templates

If there is data available in the current system, data import templates can be used to fill in the data. The dataimport templates can be downloaded in module REX Settings – Templates for Data Import.

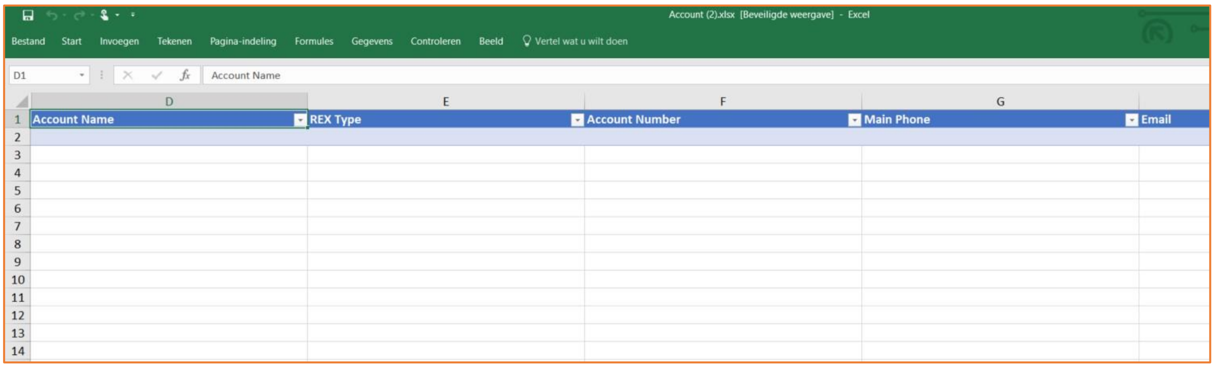




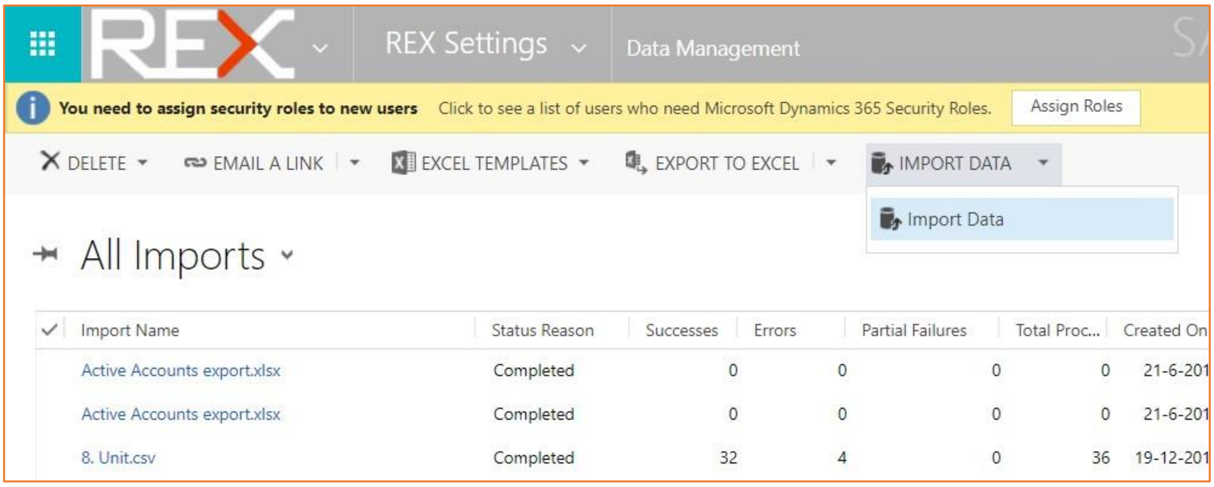
For each entity a Template for Data import can be downloaded.



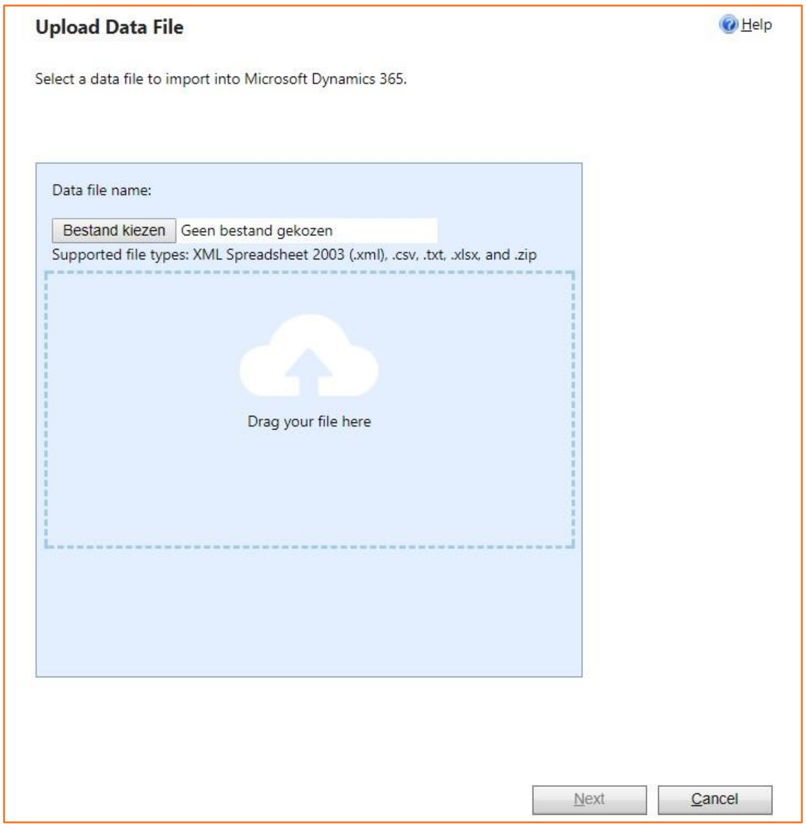
With button Download an import Excel sheet is downloaded.



After the data is inserted in the importstheet, the data can be uploaded in REX from within the Imports entity.



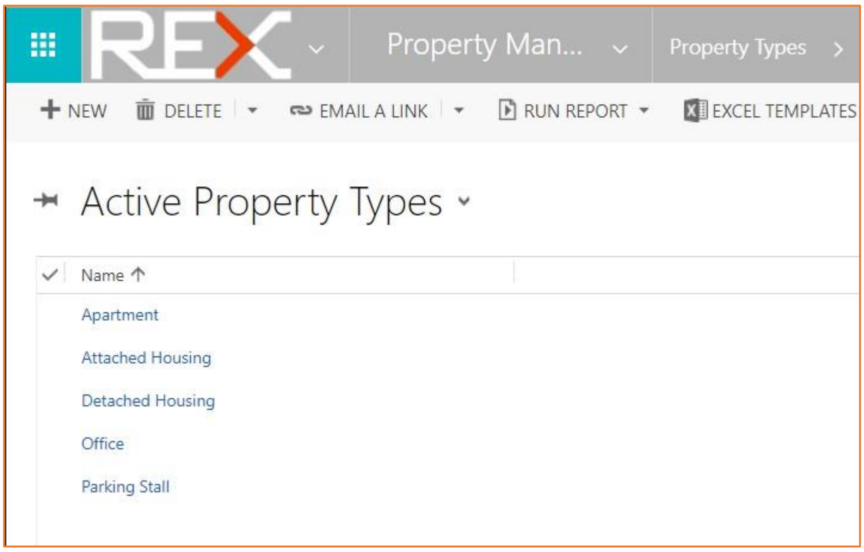
The Excel file can be selected and by following the import wizard, the data can be imported.


Upload Data File
Help
Select a data file to import into Microsoft Dynamics 365.
Data file name:
Bestand kiezen
Geen bestand gekozen
Supported file types: XML Spreadsheet 2003 (.xml), .csv, .txt, .xlsx, and .zip
Drag your file here
Next
Cancel

2.6 Filling the Property Type entity

A base entity which needs to be filled in order to work with leads and deals is the Property type entity.

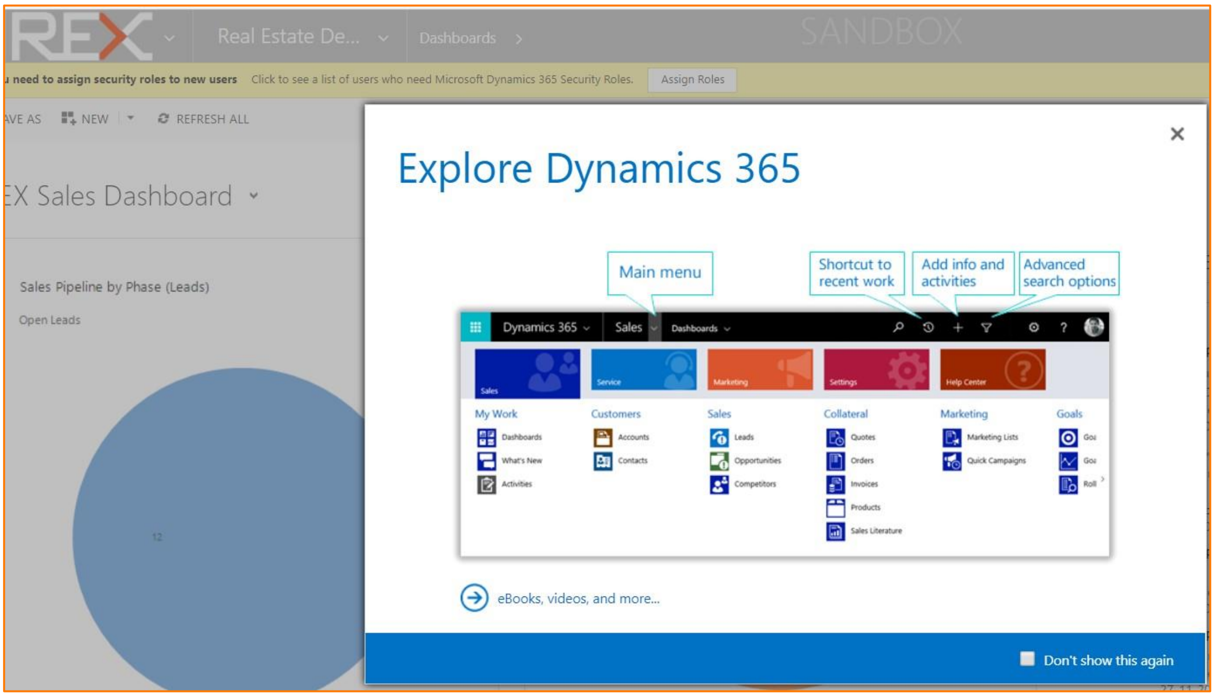
With buttonNEW the records can be created.



3 Navigation

3.1 REX – Navigation

When using CRM in a browser (Internet explorer, chrome, safari etc), the first thing to see is the Explore Dynamics 365 wizard. Here a quick overview is given in the Home page options in Dynamics 365. With the close window button X this window can be closed. Now the default Dynamics 365 homepage is shown.



Navigating in REX is done by using the menu options on the top of the screen. This menu bar contains a couple of options:

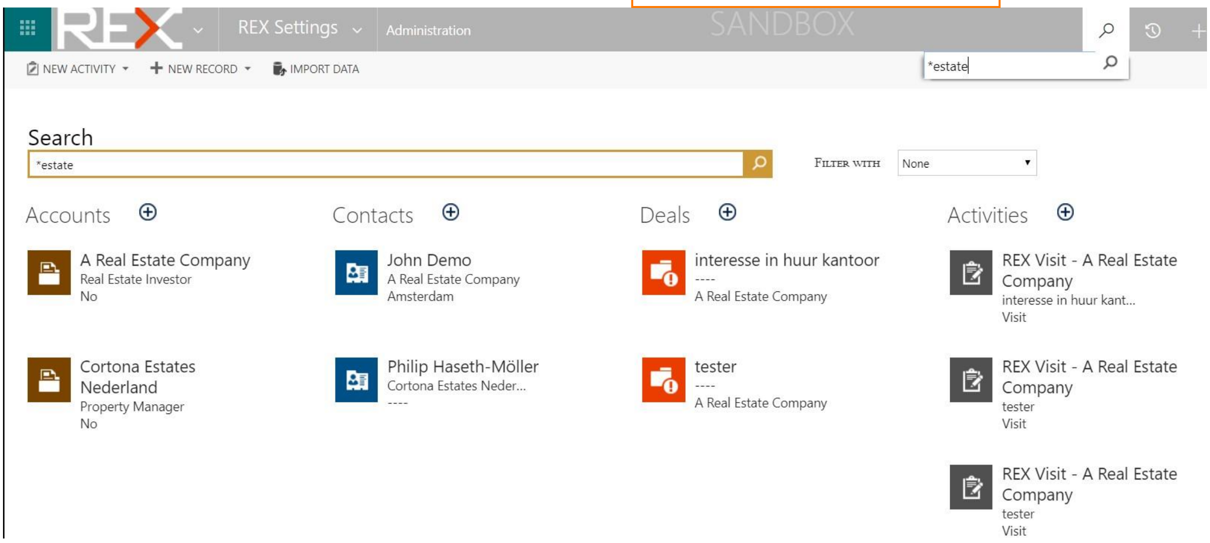
-  Navigate to other office apps / office 365
-  Select other Dynamics CRM apps
- 

Select the REX Module
- 

Selectthe recently viewed items
-  The magnifying glass  is used to do aquick blobal search on accounts, contacts, deals, activities, etc (see Systemsettings to select the datatypes which can be

searched upon).

TIP: It is possible to use wildcards like * as parts of the name in searches. Example search *estate results in all active records in which estate is in the name.



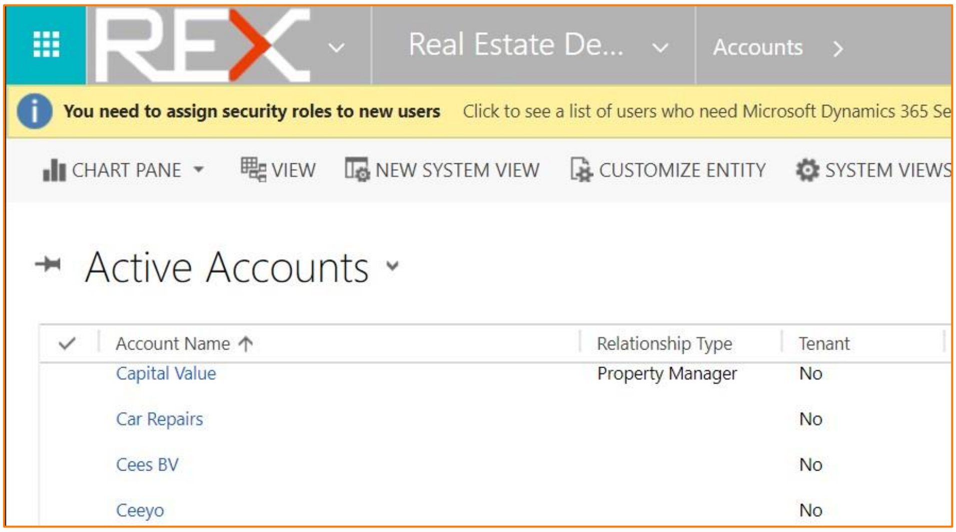
-  The Shortcut to recent work can be used to quickly go to a previous opened view or record.
-  With the add or Plus button an account, contact or activity can be created quickly.
-  With Advanced search options  more advanced searching can be done. For example, a search string can be *show me all Objects located in The Netherlands*

When working in Dyanamics 365 the first thing to determine is in which module will be worked. For REX applies that almost all relevant menu options can be found under modules Real Estate Deals and Property Managemen. The CRM modules are accessed by selecting the  symbol and then the module, see the example below.

Main Modules

- Dashboards : Overview of different records from different menu options
- Activities : Overview of planned / completed operations (tasks, etc.) appointments
- Accounts : Here you can find all accounts / companies
- Contacts : Persons working for a company
- Competitors : Competitive companies.
- Leads : Potential deals/customers or suspects
- Deals : Deals with a better close ratio then leads
- Visits : Visit Report associated at deals etc.
- Objects : Property (buildings etc) wich are in use in the company
- Units : Rooms, spaces etc inside an object
- Contracts : Contractual agreements associated at objects/units
- Invoices : Generated invoices (EMLinked connection)
- Property Types : Different types of property

By selecting a menu-option (f.e. Accounts), the records are shown in a list view. In the figure below the Active Accounts are shown.



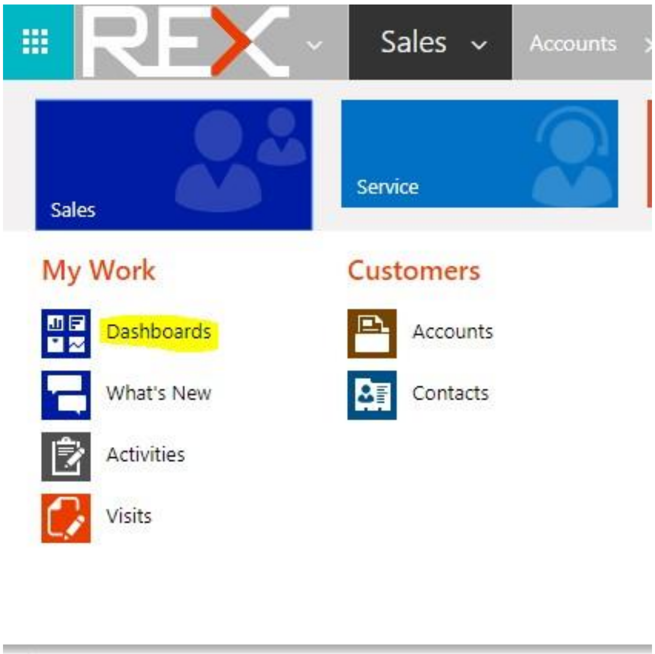
Views filter the information on predefined fields. By clicking on the symbol, located right of the view "Active Accounts", a different view can be selected.

REMARK: Each user can display its own preferred view by using the pushpin. This will then be displayed by default.

TIP: It is possible to use wildcards like * as parts of the name in searches. Example search *Cap results in all active records in which Cap is in the name.

3.2 Dashboards

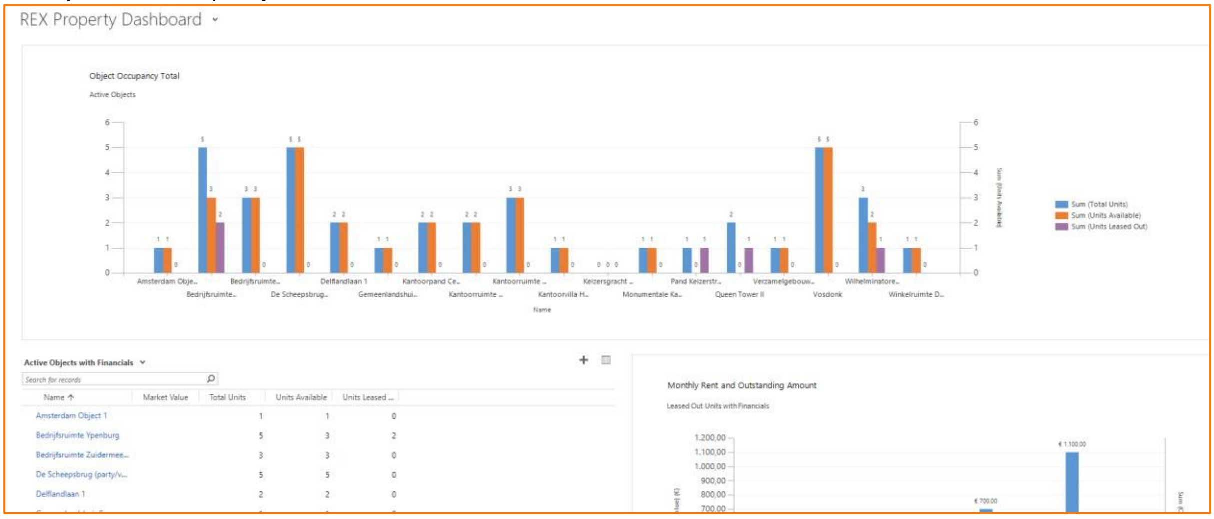
Dashboards can be accessed both the Sales and Service modules.



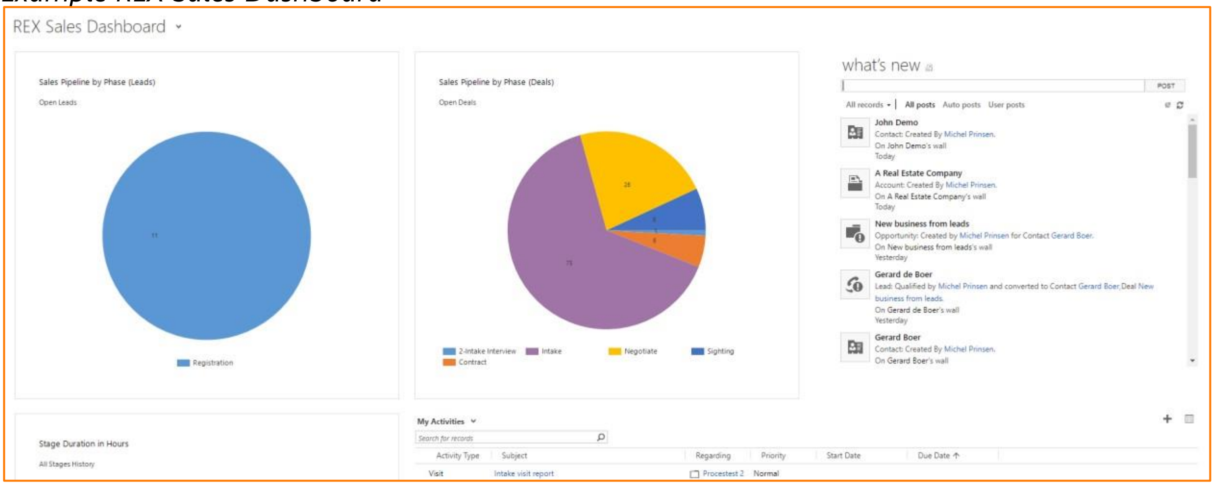
Next to the many Dynamics 365 dashboards REX is equipped with 3 custom dashboards:

- REX Property Dashboard
- REX Sales Dashboard
- REX Tenant Dashboard

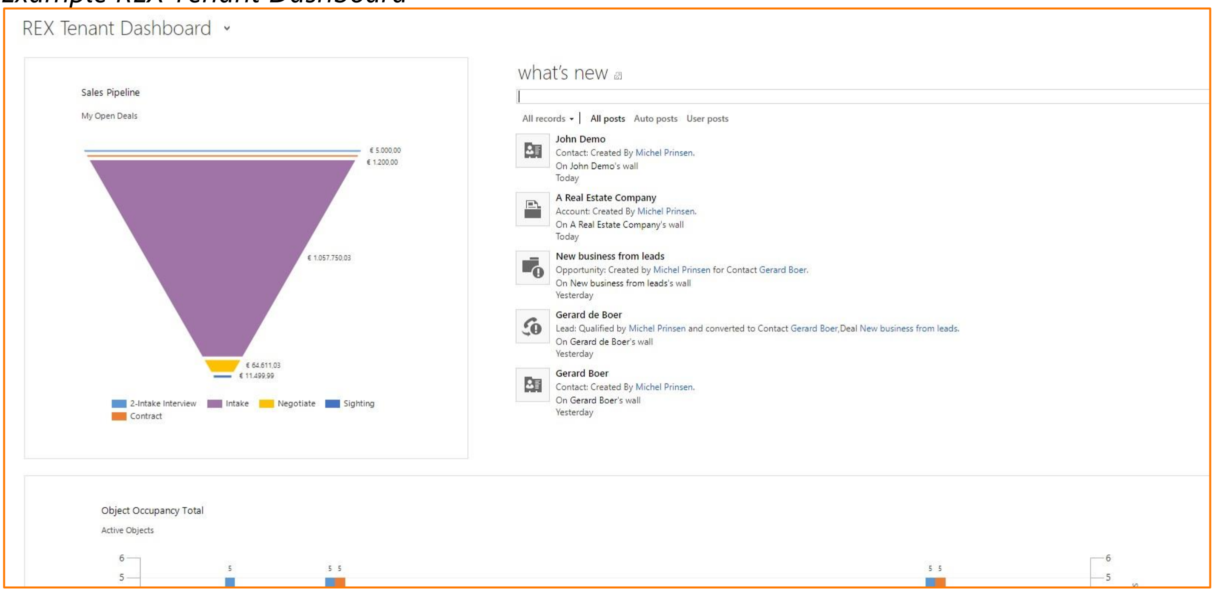
Example REX Property Dashboard



Example REX Sales Dashboard



Example REX Tenant Dashboard

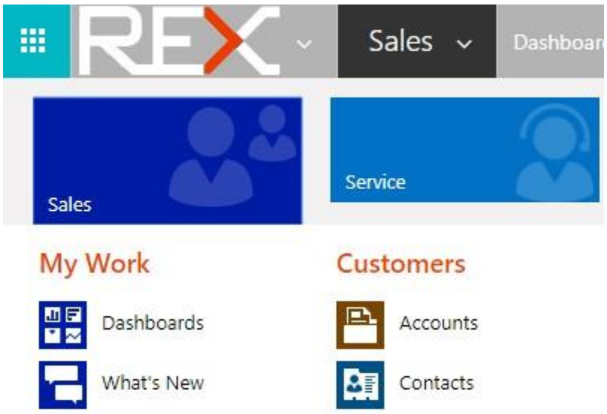


4 Accounts and Contacts

4.1 General

The base entities in REX are Accounts and Contacts. Accounts are used to manage company relations like Business Tenants, Real Estate companies, Contactors, Goverments etc. while Contacts are used to manage persons associated at companies or individuals and private tenants.

Both accounts and contacts are available in the modules Sales and Service.



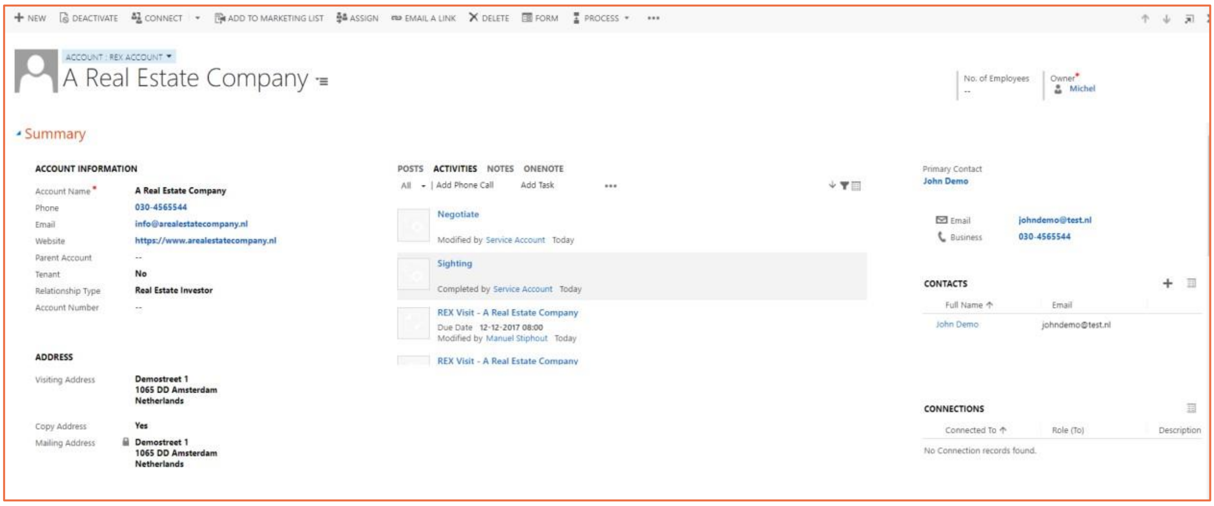
4.2 Accounts

Active Accounts

Account Name	Relationship Type	Tenant	Main Phone	Visiting Address: City	Primary Contact
Aannemersbedrijf Harleman BV	Contractor	No	0570-620108	Deventer	Pepijn Harleman
Account Testnaam	Contractor	No		amsterdam	Contact Testnaam
Account Testnaam Bedrijf 2	Contractor	No			
Annexum	Property Manager	No	020-5720101	Amsterdam	
Bedrijfsnaam		No			Stiphout
Beheermaatschappij Amsterdam		No		Amsterdam	
Brussé Vastgoed	Property Manager	No	010-4263437	Schiedam	

With button NEW a new account can be created. An account consists of several fields, like:

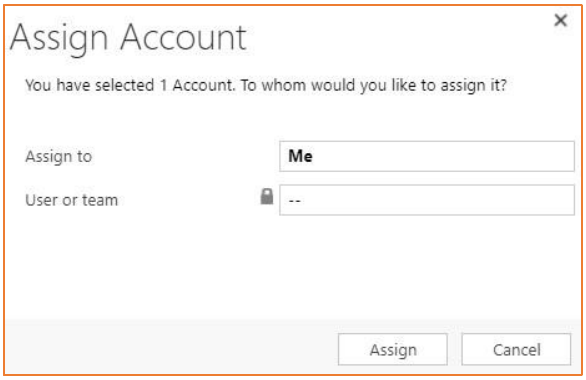
Account name, *Relationship Type* and *Address*. After filling in the fields, the account record can be saved using Ctrl-S or the SAVE button.



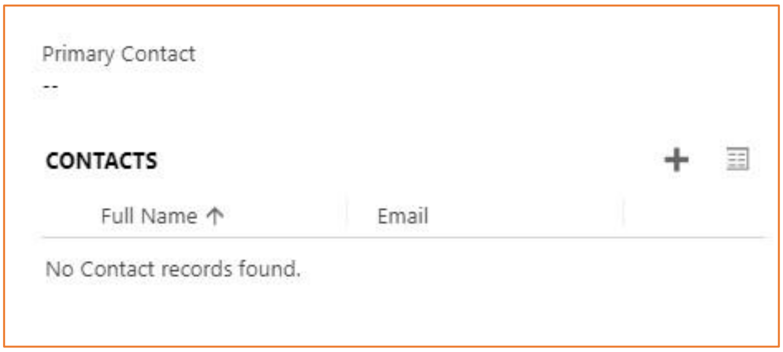
Information on the form is structured as follows:

- Information on the record itself like address-, relationship- and contactinformation
- Information associated at accounts, like:
  - Activities : Tasks, Email, Appointments and Emails
  - Contacts : Contacts associated at the account
  - Connections : Connections and Roles to other records
  - Recent deals : Deals connected at this account
  - Leases : Leases connected at this account
  - Recent cases : Cases connected at this account

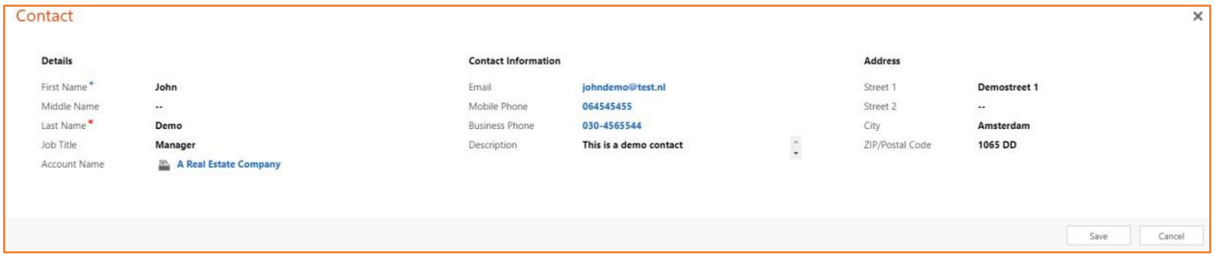
All data in CRM has an owner. By default the person which creates the record is the owner, however this can be modified by assigning the record to another owner using button ASSIGN.



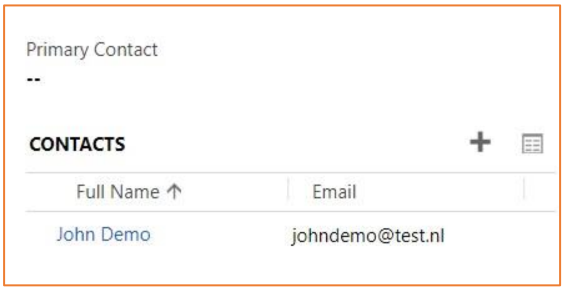
Contacts can be created from the context of an account with the plus + sign in subgrid Contacts.



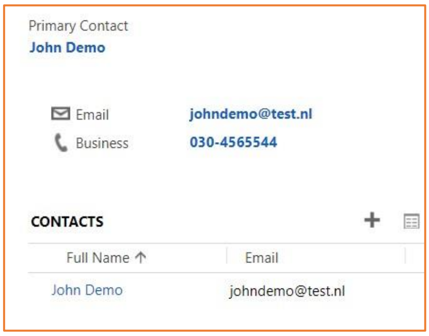
A new quick create form opens where the data can be inserted. Automatically the contact will inherit information like address from the account.



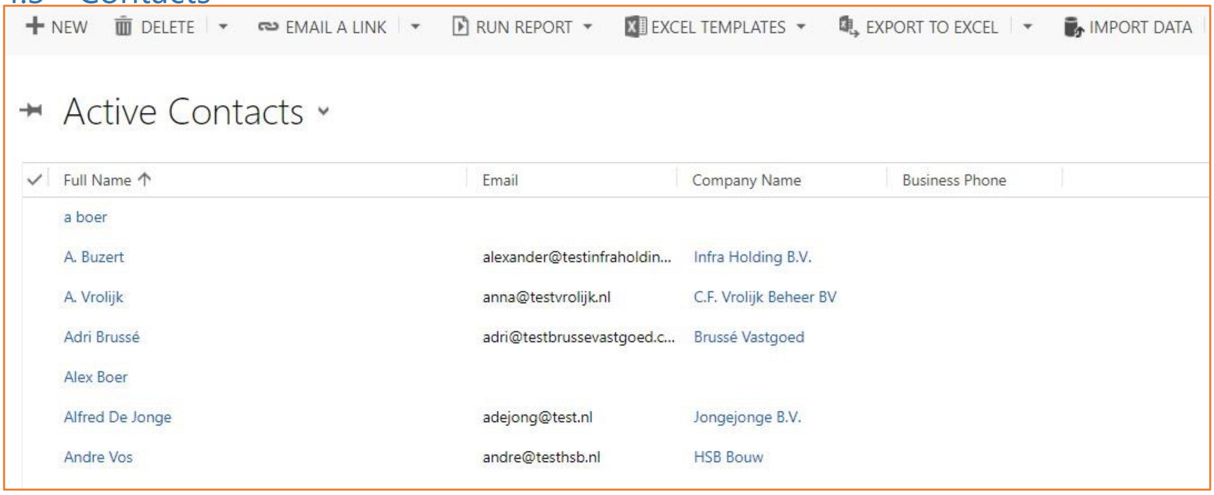
With buttonSAVE the contact is created.



Also a Primary contact can be selected on the account form. Now the contactdetails are show instantly on the account form.

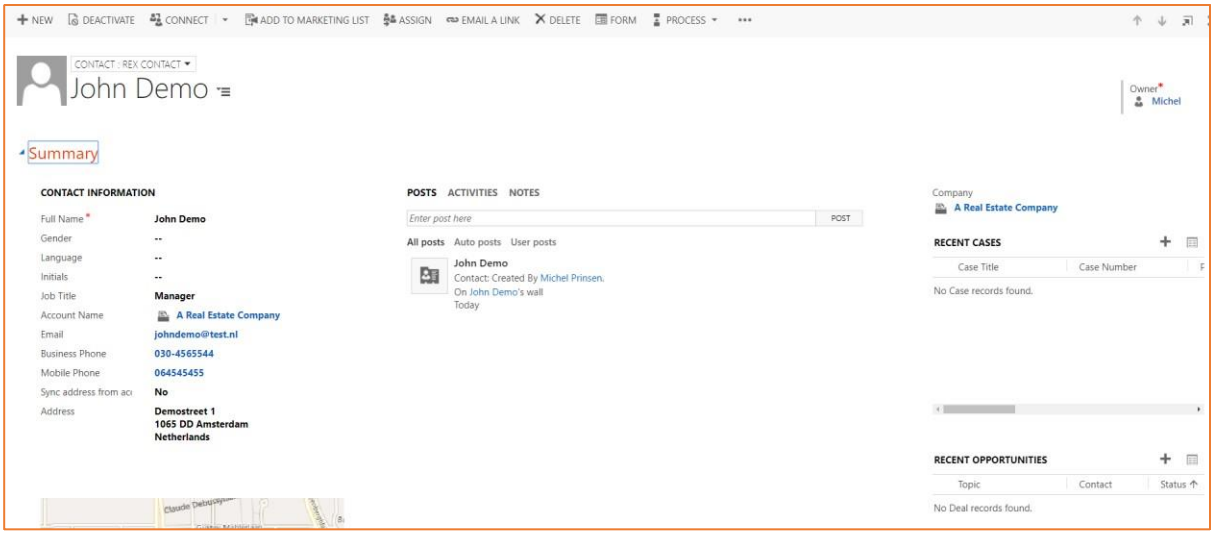


4.3 Contacts



With button NEW a new contact can be created. An contact consists of several fields, like:

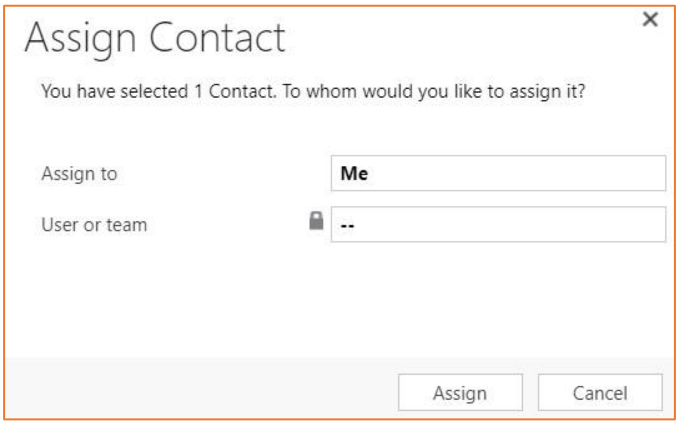
Fullname, *Email* and *Address*. After filling in the fields, the contact record can be saved using Ctrl-S or the SAVE button.



Information on the form is structured as follows:

- Information on the record itself like address- and contactinformation
- Information associated at contacts, like:
  - Activities : Tasks, Email, Appointments and Emails
  - Recent cases : Cases connected at this contact
  - Recent deals : Deals connected at this contact
  - Leases : Leases connected at this contact

<u>All</u> data in CRM has an owner. By default the person which creates the record is the owner, however this can be modified by assigning the record to another owner using button ASSIGN.



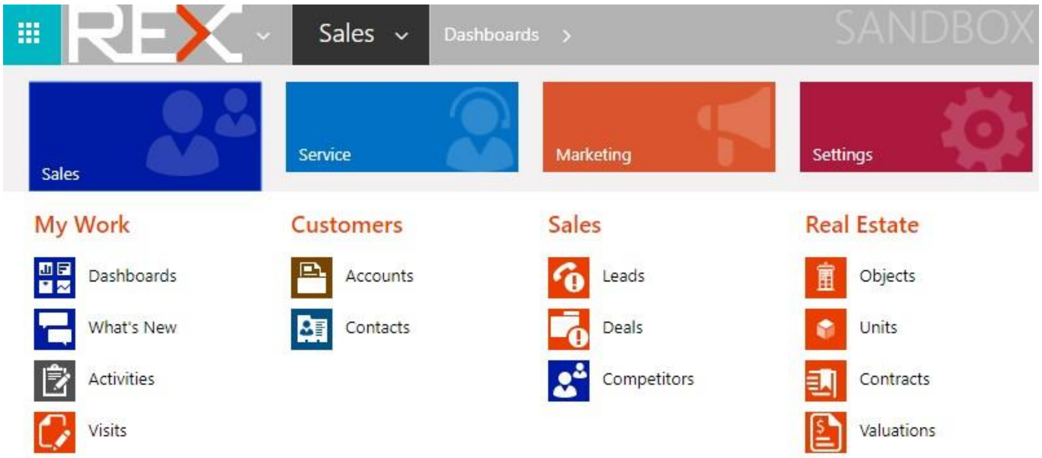
5 Objects, Units and Contracts

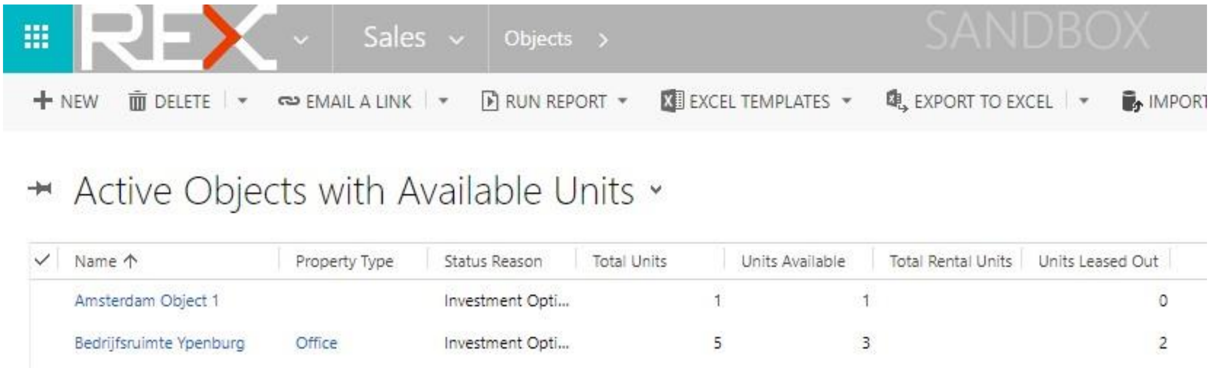
5.1 General

Objects, Units and Contracts are maintained in the corresponding entities. During the Sales process, Objects and Units can be associated at leads and Deals using the Match entity. The final step in this process is the Contract phase. Now the preverred Match record is maintained/contracted.

5.2 Objects

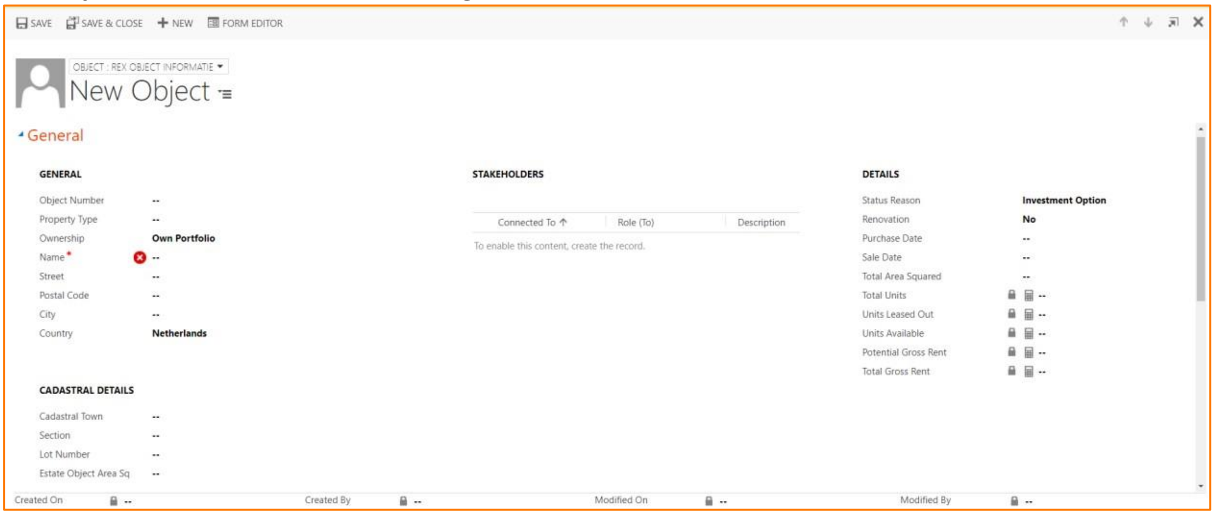
Objects are used for storing property specific information.





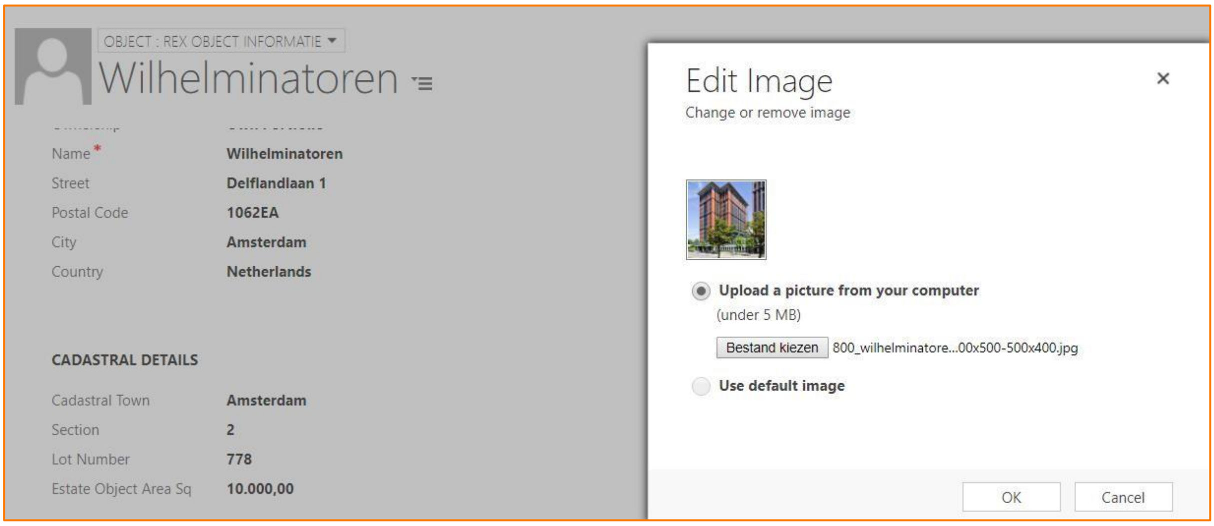
With button NEW a new object can be created. An object consists of several fields, like:

Object Number, *Property Type*, *Name*, *Address* and *Cadastral details*. After filling in the fields, the object record can be saved using Ctrl-S or the SAVE button.



Note, locked fields like Total Units are automatically filled based upon other records/criteria.

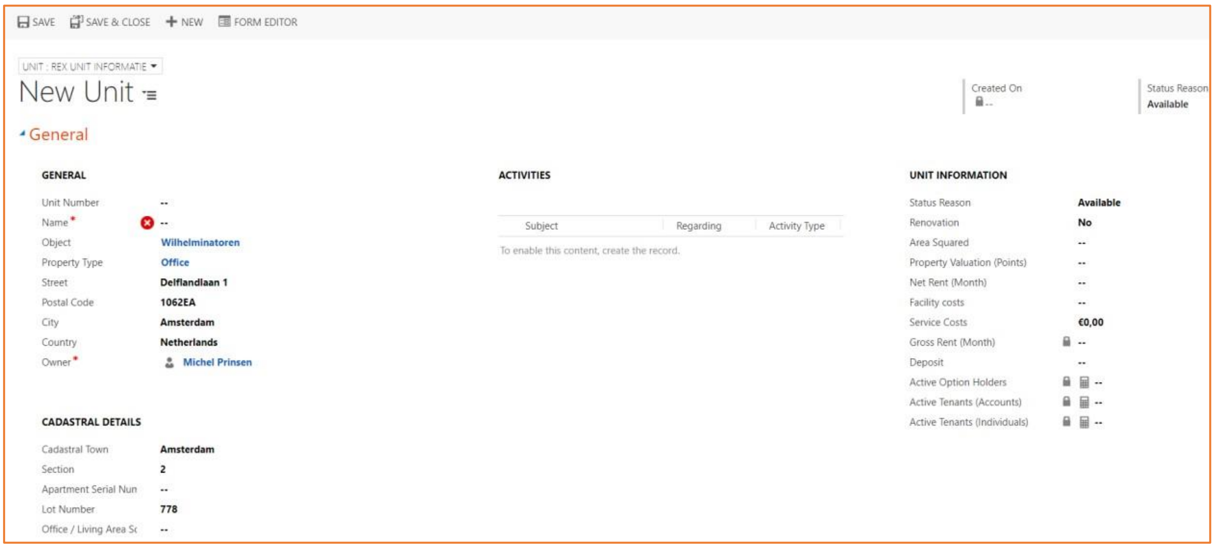
A picture can be saved upon the record by clicking on the  icon, select the appropiate picture ans press OK.



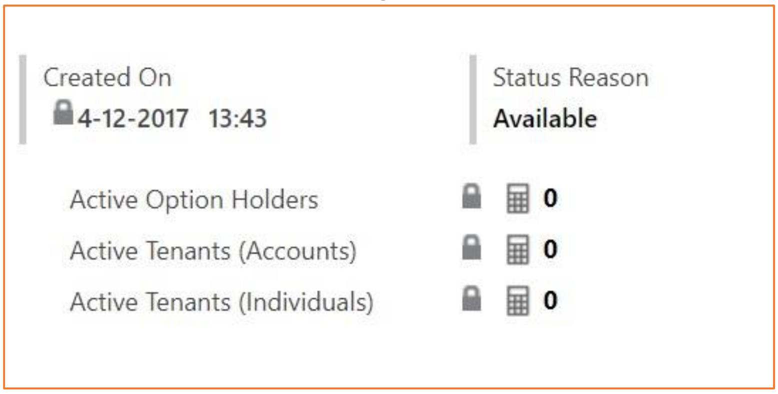
In the below part of the record in tabpage Units and Maintenance Cases subgrid Units, units can be associated at the object by pressing button +. If the Unit was created previously, this can now be selected. Otherwise press button + New

5.3 Units

The best approach of creating units is to create them in the context of the parent object record. Now some fields like address and cadastral details are automatically taken over to the unit.



An unit can have the following statusses: Available, Leased Out, Option, Sold, Not Available.

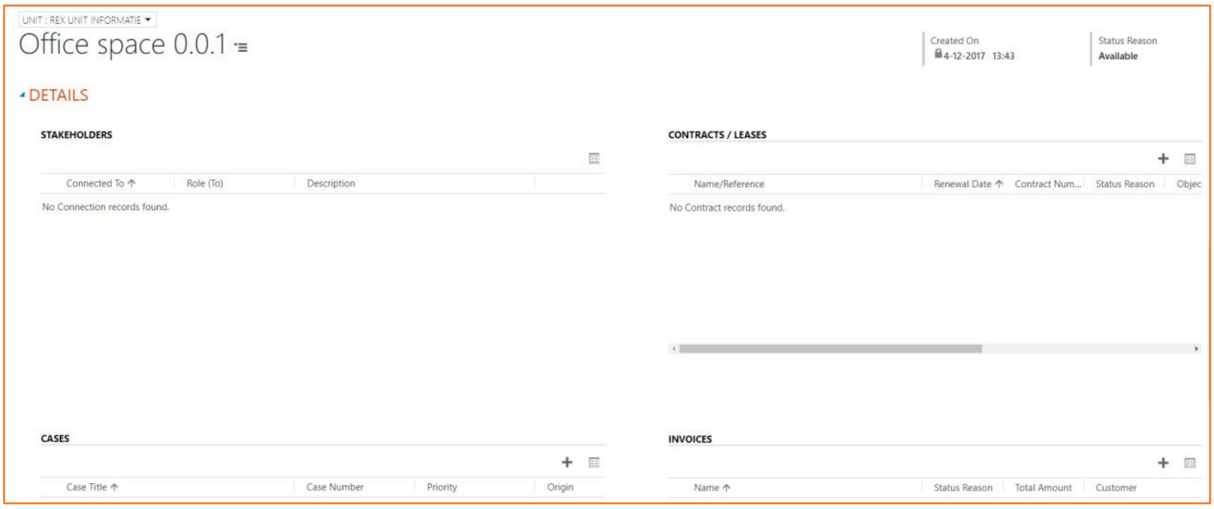


When creating an Unit the default status is Available. If the Active Tenants is >= 1, then the status will be set to Leased Out. If Active Option Holder is >= 1, then the status will be set to Option. Statusses Sold and Not Available are set Manually.

The following information can be associated at Units:

- Stakeholders
- Contracts/Leases
- Cases
- Invoices

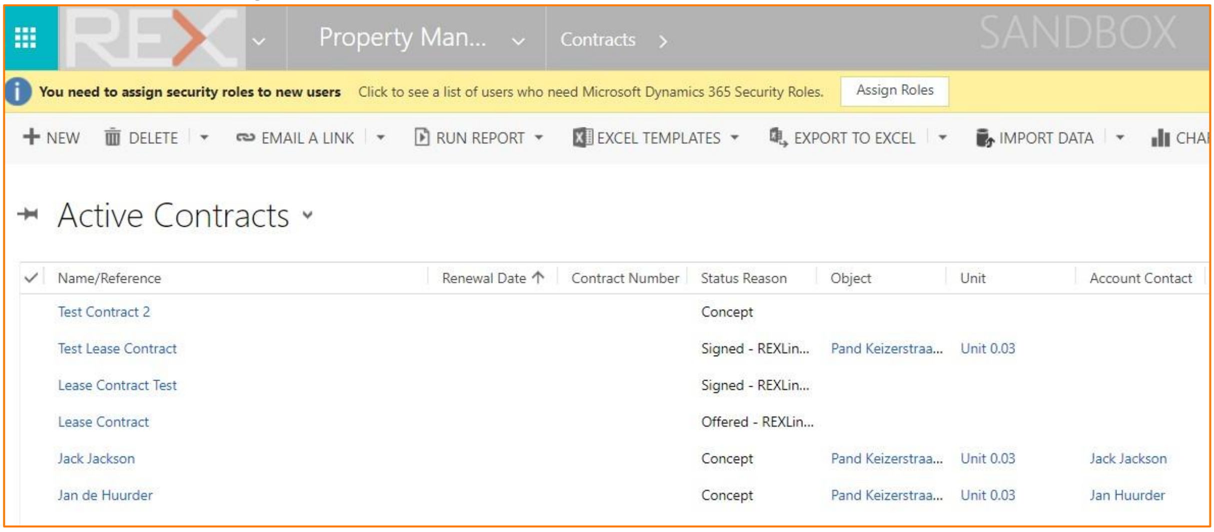
Best practice for dealing with Invoices is to use the EMLinked connection.



5.4 Contracts

Contracts can be created from the Contract entity or can be the result of the Lead – Deal Sales Process.

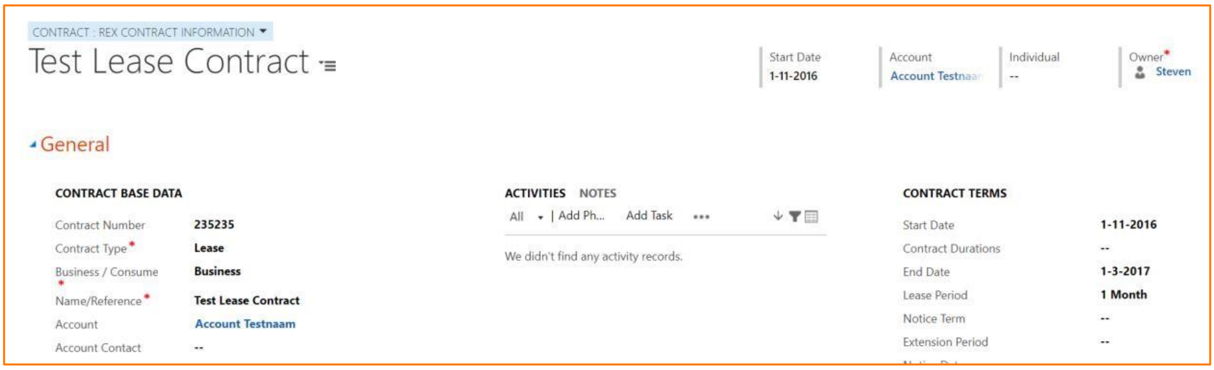
Contracts containing information like start- and enddate, customer data and financial data.



A contract can have the following statuses:

- Concept
- Offered – REX Linked

- Signed – REXLinked

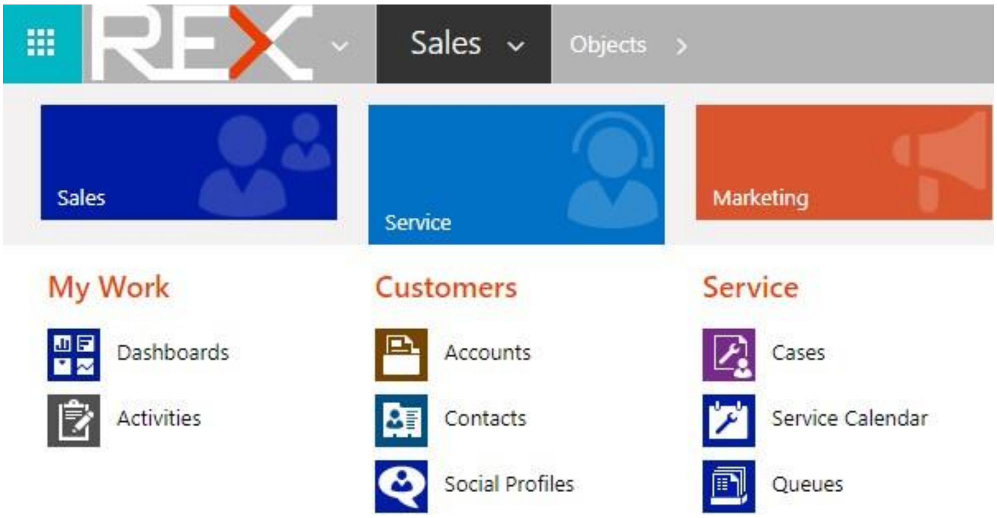


The status of the Contract determines the status of the Unit/Object.

6 Case Management

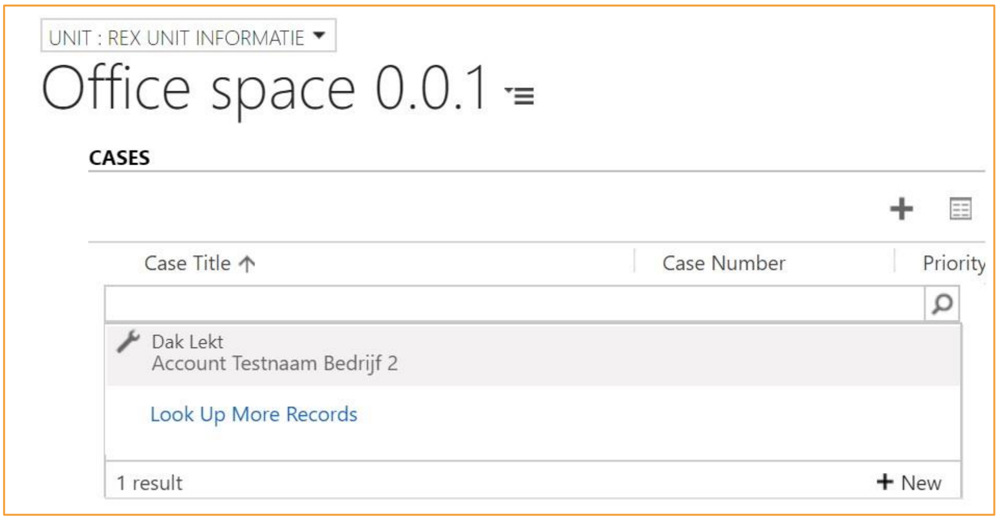
6.1 General

Depending on the support level companies uses for their customers, cases are to be used. Cases can be used to file a “simple” complaint, or for registering a complete object renewal process. Cases are available in the module Property Management.

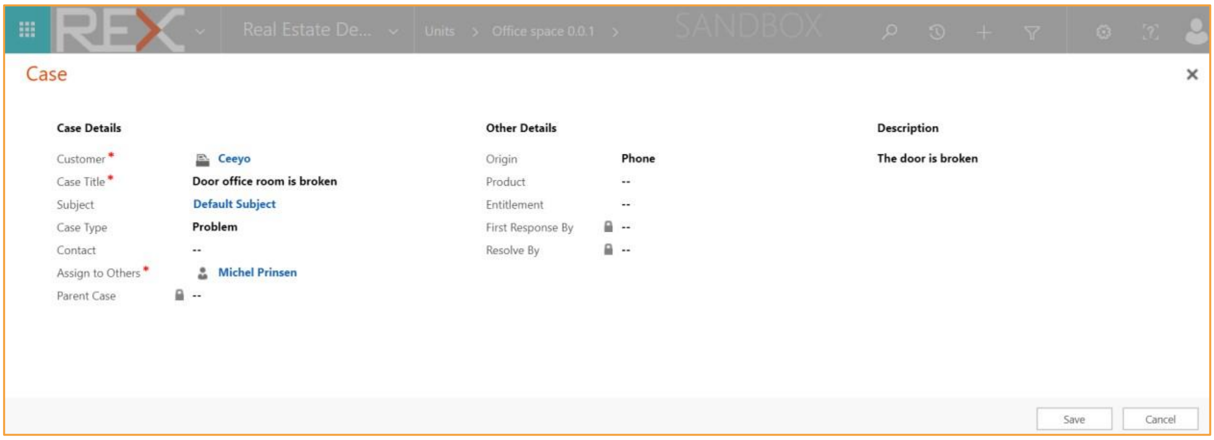


6.2 Cases

Case creation can be done from within the Service Module. Also cases can be created from within the context of objects, units or accounts. The below picture shows a case creation from the Unit record.

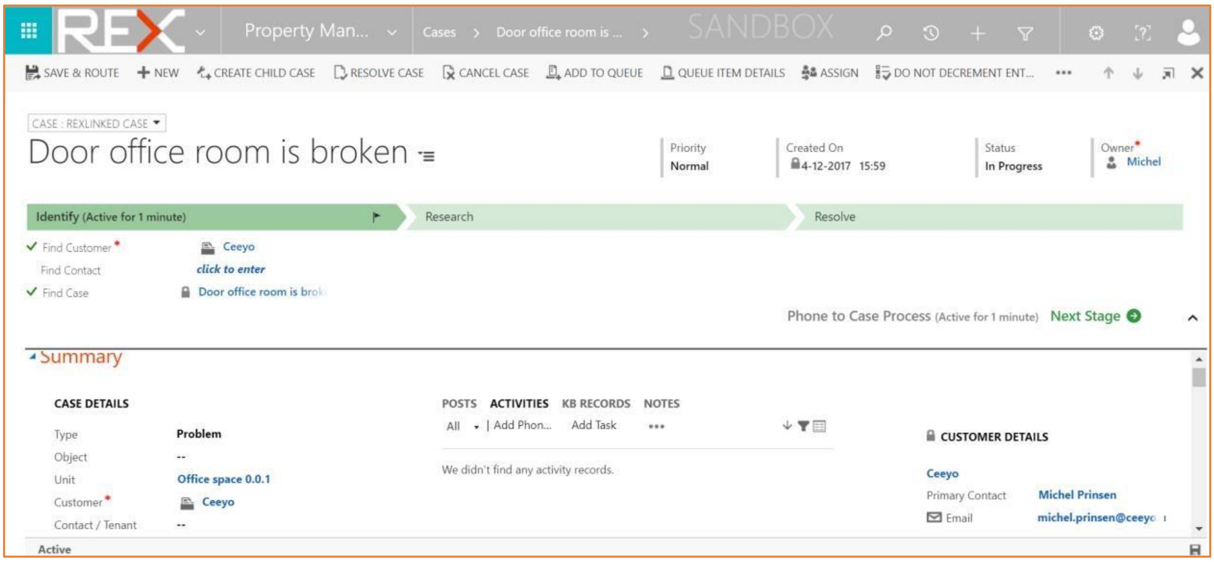


When a case is created from within the context of a parent record plus icon and button New, then the quick create case form is shown.



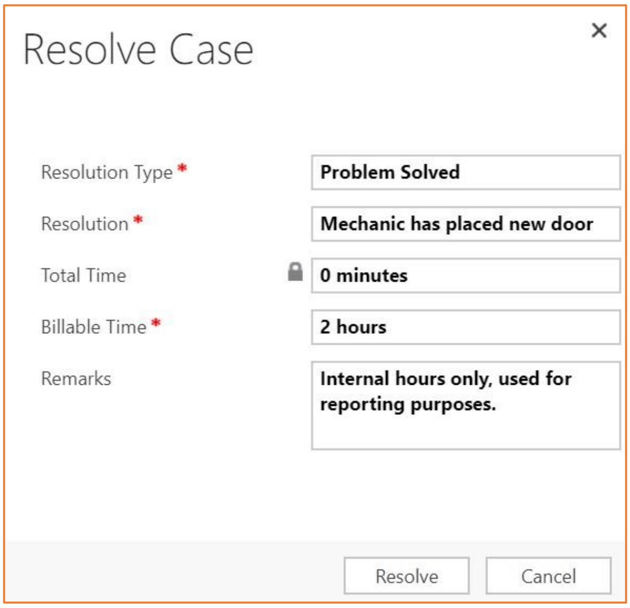
The quick create form shows an extract of the total case field. After the appropriate fields are filled, the case can be created with button Save. A casenumber is automatically generated.

Opening te case shows the case form. On this form additional case information can be added or assocated at. Activities can be created and used for follow up of the case. Also similar cases can be searched upon in order to streamline the casemanagement process and have a consistent quality in case resolving.



By using the Business Process Flow the case representative is guided through the nessecary steps of closing the case. With the Next Stage button, the status of the case can be transferred from Identify, Research to Resolve.
When the case is Resolved, this option can be selected in the corresponding phase.

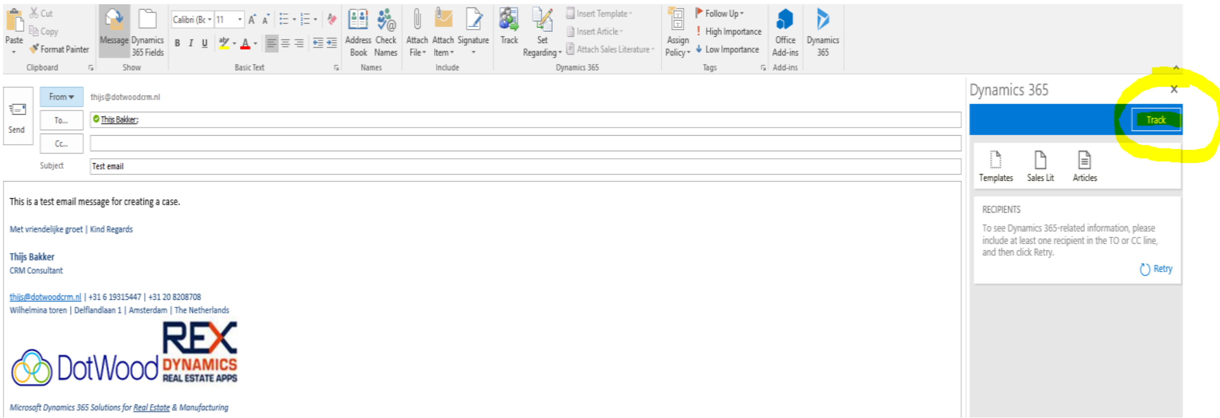
The case close form is shown. After filling in the required and wanted information, the case can be closed with button Resolve.



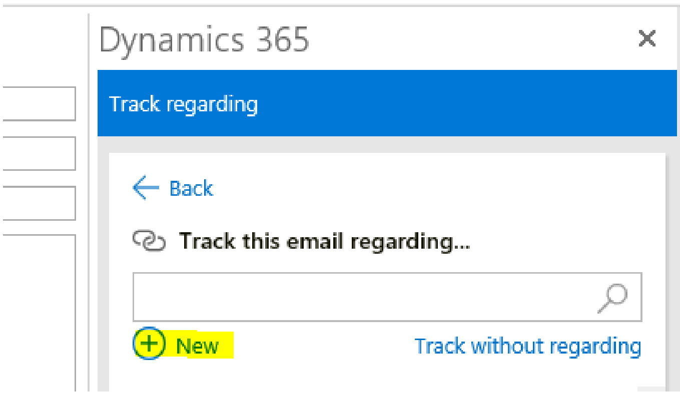
Example of a closed case

6.3 Email Integration

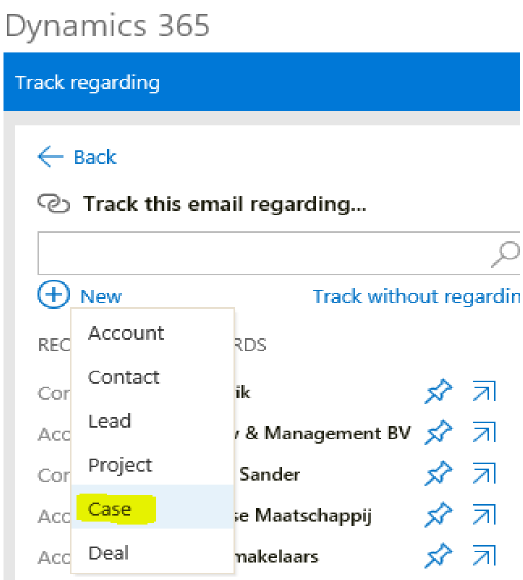
It is also possible to create a case directly from within an email. The Dynamics for Outlook App provides the possibility to do this. First of all the email needs to be tracked via the Outlook App.

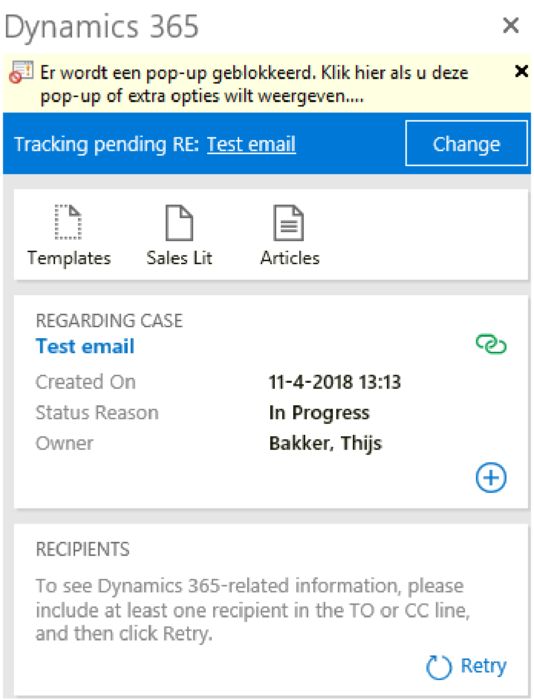


Then click the "NEW" button

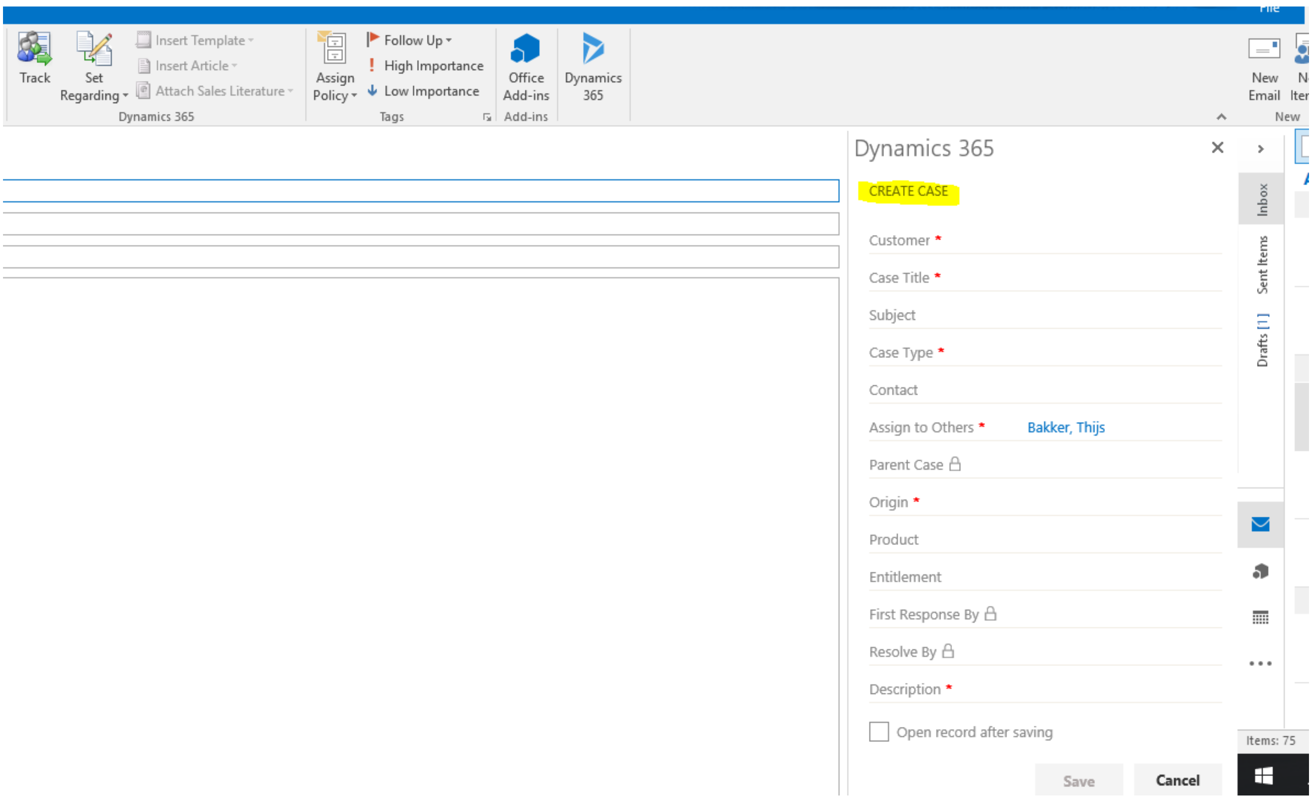


That makes it possible to track the email regarding a case and create the case at the same time.



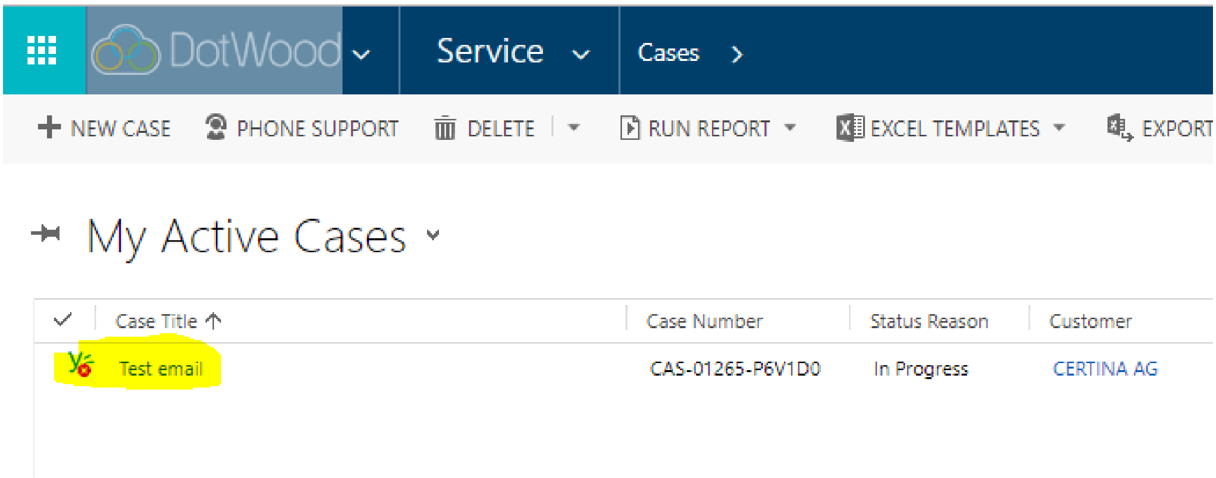


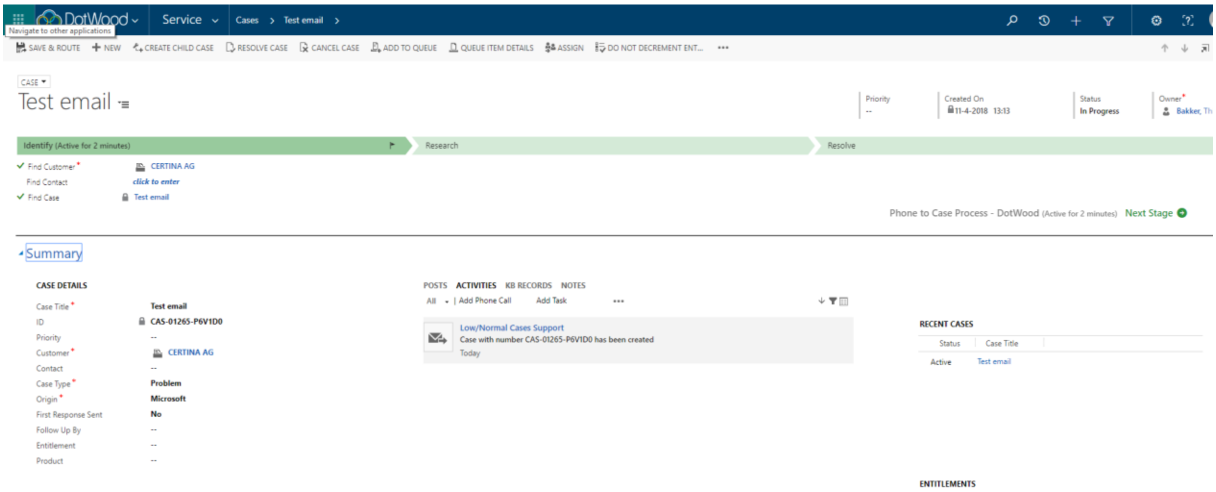
Then the fields of the case need be filled manually.



After filling the required fields and clicking on the “SAVE” button the case is created.

At this point the case has been created in CRM and a confirmation email has been sent.





Dear ,

Case with number CAS-01265-P6V1D0 has been created with the following details
Case title: Test email
Case description: This is a test case.

Best regards,

DotWood Support Team

This is an automated email

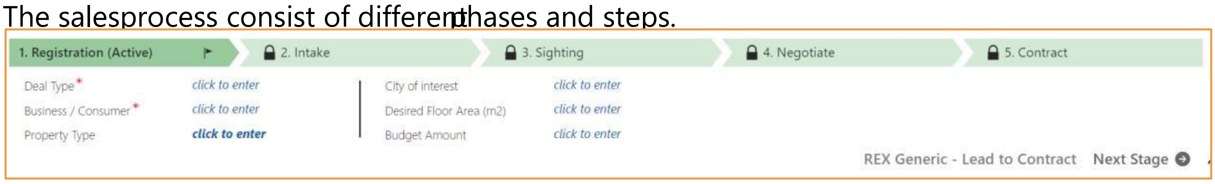
7 Leads and Deals

7.1 General

The REX "Sales" process is maintained in Leads and Deals. Generally speaking, a Lead is a cold "Deal" for new accounts or contacts, while a Deal is a better chance of closing / registering a Contract for existing relations. The following Sales types are available:

- Investment deal
- Sales deal
- Lease inquiry
- Property management
- Maintenance deal
- Tenant rep
- Valuation
- Consultancy
- Other

The salesprocess consist of different phases and steps.

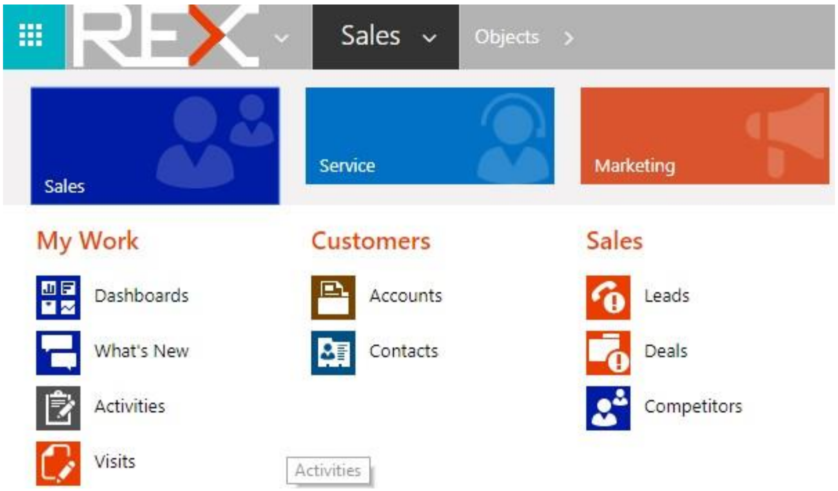


The duration of theses different stages are saved in the Stage History entity. This is done for Reporting/Analysis purposes. See paragraph Stage History for more detailes.

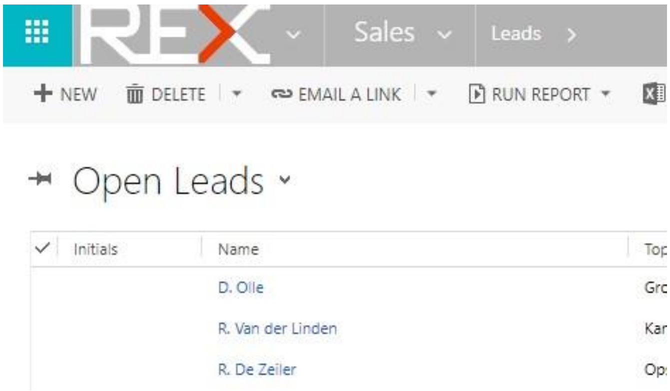
The next paragraphs further describes the Lead and Deal process.

7.2 Leads

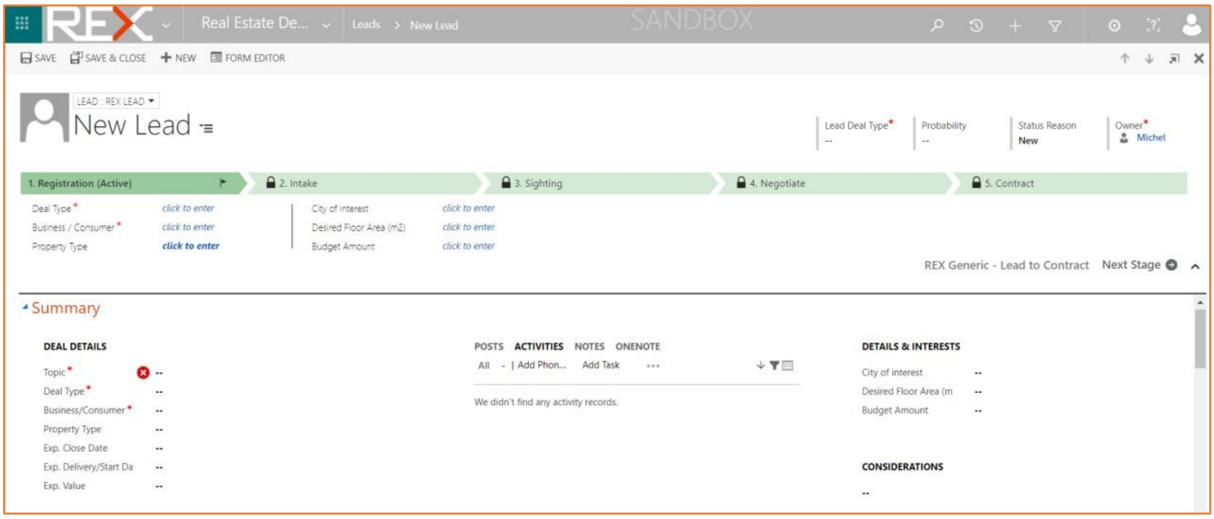
Leads are maintained in the Leads entity which is available in the Sales module.



With button NEW a new lead record is created.



A Business Process Flow is used to guide the repronsible user throught the Lead – Deal – Contract process.

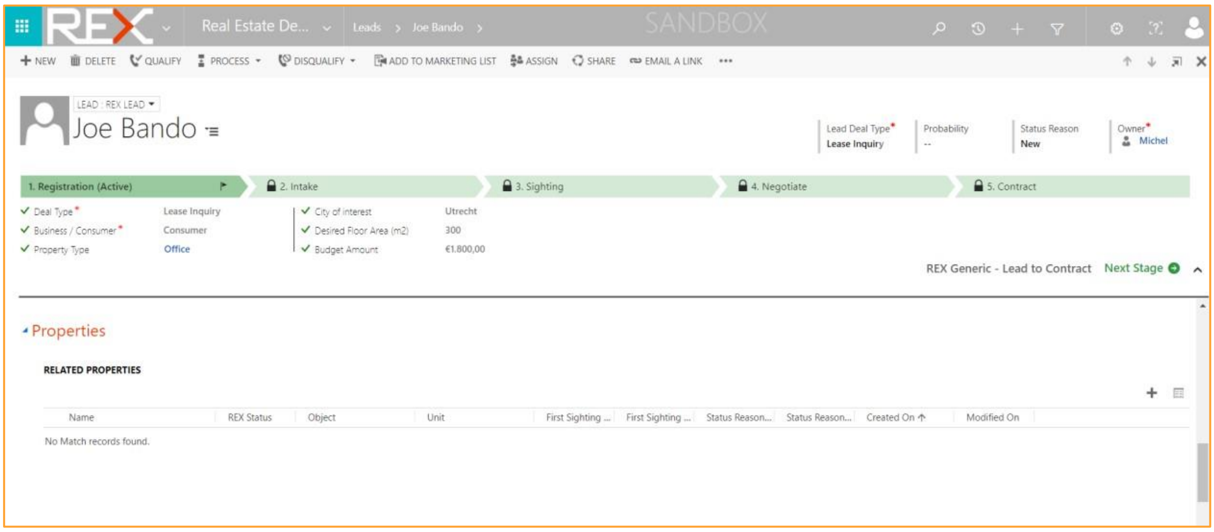


The deal type determines the phases and steps which are used in the sales process. Leads are in the Registration phase. When a lead becomes more likely to become a contract, a Deal is created. In general the following phases are distinguished:

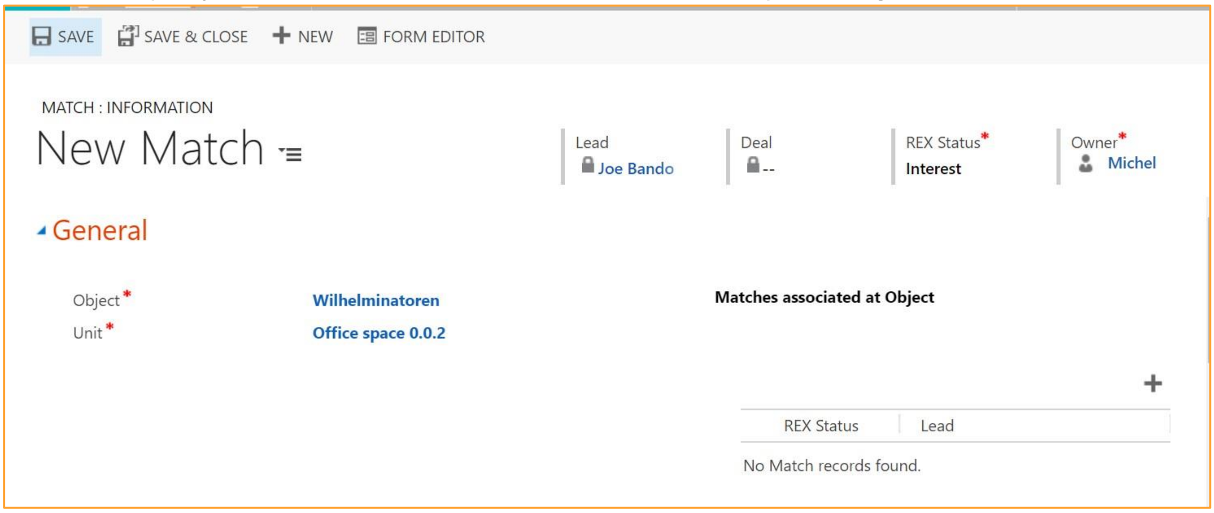
- 1. Registration : General information needed in the registration phase.
- 2. Intake : Activities done in the intake phase
- 3. Sighting : When the sighting is planned/done
- 4. Negotiate : Negotiating of the contract
- 5. Contract : Contract phase

The following information can be associated at leads.

- Activities like phonecall's, tasks, appointments etc.
- Details and interests
- Match(es) of the lead by registration of Propertie(s)



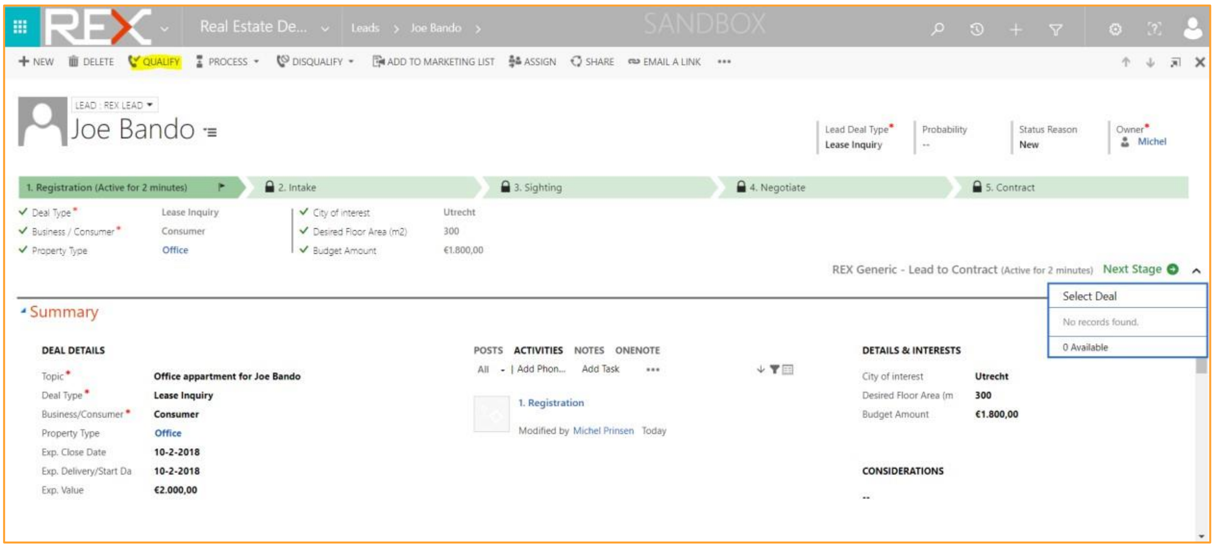
Properties are records associated at a lead, deal or contract. From within each of those records Property or Match records can be created with the plus + sign.



In the Match record the Object and Unit need to be filled. The match can have one of the following statuses:

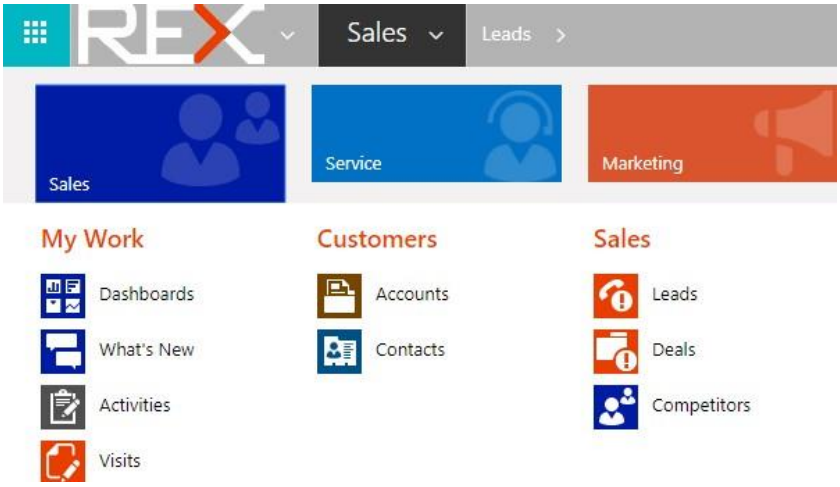
- Interest (default)
- Sighted
- Option
- Contracted
- Denied

With button SAVE & CLOSE the match record is saved and the previous form will be shown again. When going from the Registration to the Intake stage a Deal needs to be created. This is done using button Qualify.

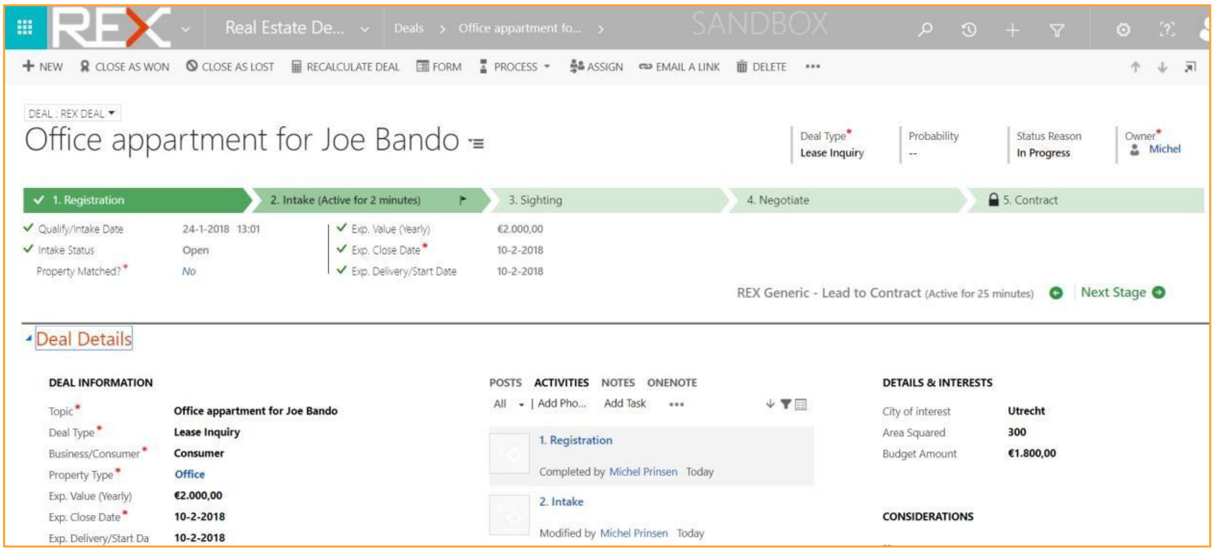

REX
Real Estate De...
Leads > Joe Bando >
SANDBOX
NEW DELETE QUALIFY PROCESS DISQUALIFY ADD TO MARKETING LIST ASSIGN SHARE EMAIL A LINK
LEAD : REX LEAD
Joe Bando
Lead Deal Type Lease Inquiry
Probability --
Status Reason New
Owner Michel
1. Registration (Active for 2 minutes)
2. Intake
3. Sighting
4. Negotiate
5. Contract
Deal Type Lease Inquiry
Business / Consumer Consumer
Property Type Office
City of interest Utrecht
Desired Floor Area (m2) 300
Budget Amount €1.800,00
REX Generic - Lead to Contract (Active for 2 minutes) Next Stage
Select Deal
No records found.
0 Available
Summary
DEAL DETAILS
Topic Office appartment for Joe Bando
Deal Type Lease Inquiry
Business/Consumer Consumer
Property Type Office
Exp. Close Date 10-2-2018
Exp. Delivery/Start Da 10-2-2018
Exp. Value €2.000,00
POSTS ACTIVITIES NOTES ONENOTE
All | Add Phon... Add Task
1. Registration
Modified by Michel Prinsen Today
DETAILS & INTERESTS
City of interest Utrecht
Desired Floor Area (m 300
Budget Amount €1.800,00
CONSIDERATIONS
--

7.3 Deals

Deals can be manually from the Sales module or automatically by qualifying a lead.



When a deal is created from a lead, all (related) information is also taken over to the Deal. This ensures a proper customer view.



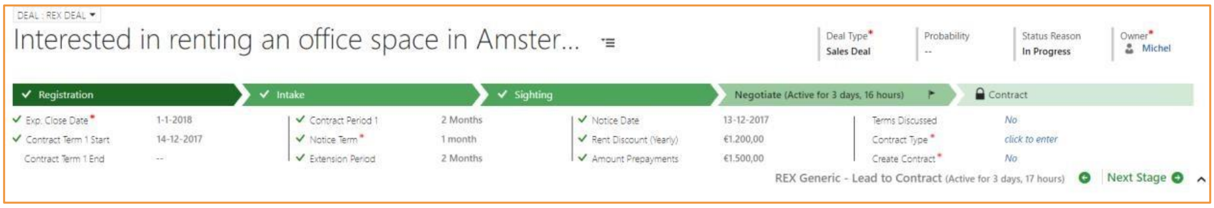
The following phases are available in the Deal.

- Intake
- Sighting
- Negotiate

In the Intake phase more detilas of the deal can be maintained. For example more properties of interests can be registered with the Plus + icon in subgrid Related Properties. See paragraph Properties/Matches for more information.

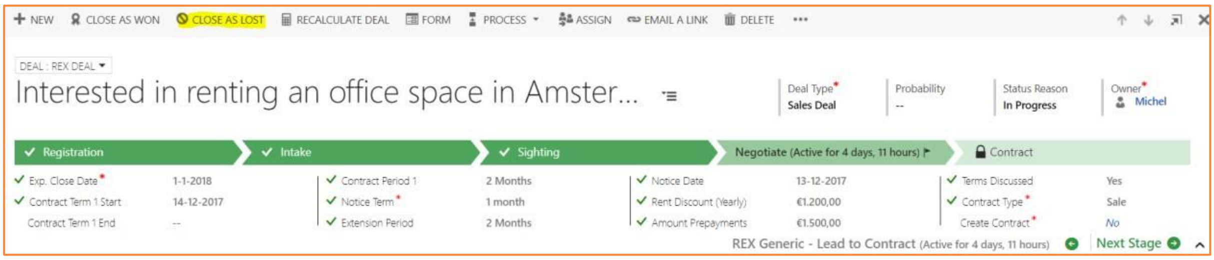
In the Sighting phase the visit van be planned and a visit report can be created. See paragraph Visit Reports for more information.

In the Negotiate phase the financial details can be further detailed.

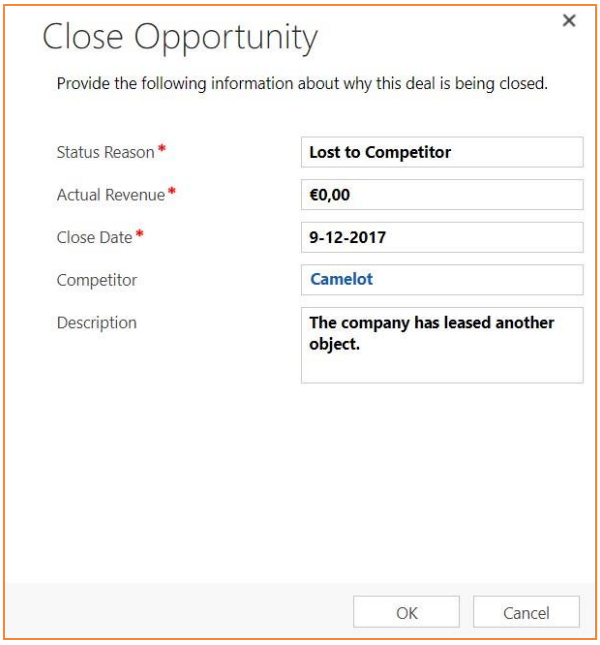


Closing the deal - Lost

A Deal can be won or lost. When a deal is lost, it is closed with button CLOSE AS LOST.



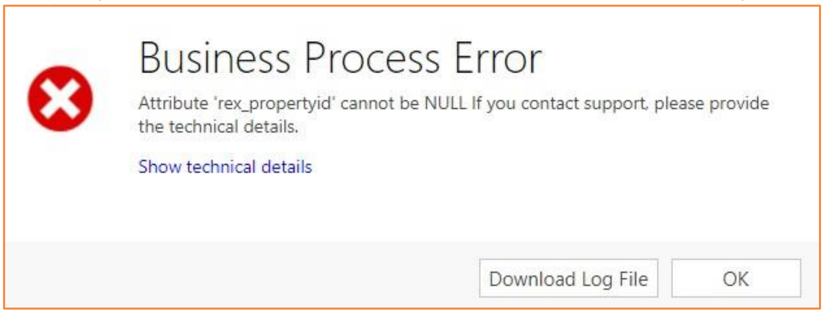
Now a dialog window is opened where the Competitor (if known) can be filled, before closing the deal with button OK.



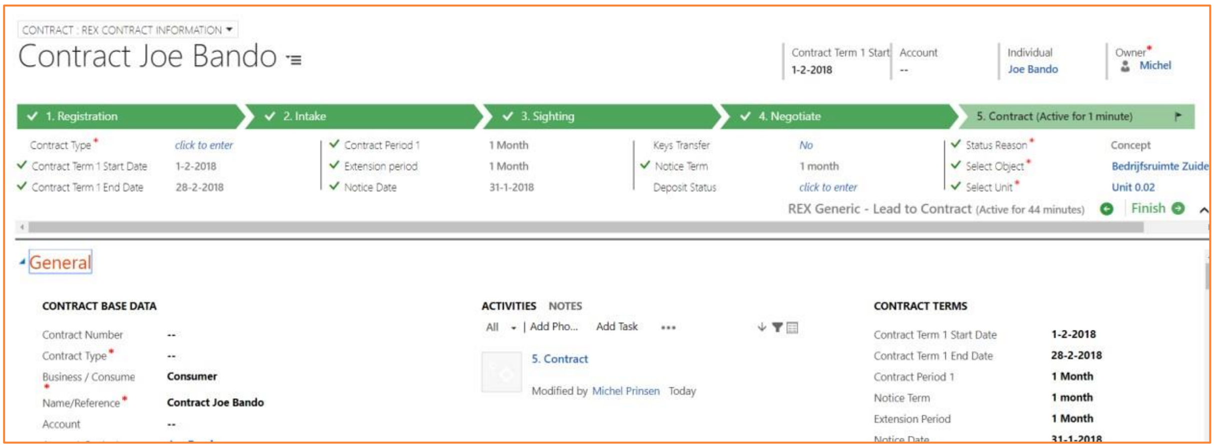
Closing the deal – Won

When the Deal is won, a contract is to be created. A contract is created by selecting Yes in option Create Contract.

Before a contract can be created, the contracted Property to be selected. If there is no Property selected, an error will be shown that the Property needs to be filled.



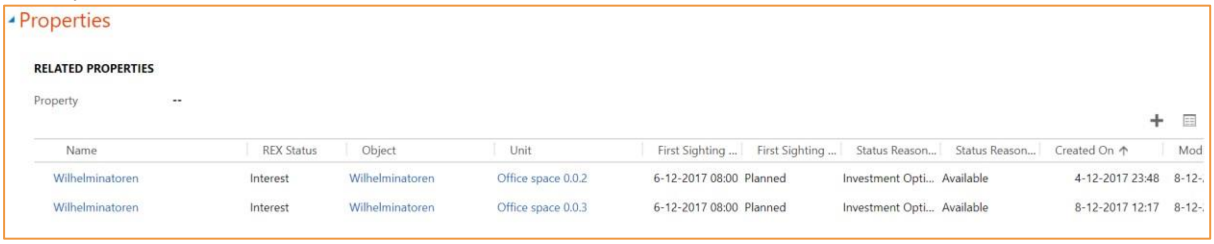
Now with button Next Stage the Contract can be selected and the record will be opened.



See for more information Contracts

7.3.1 Properties/Matches

Properties or match records determine which properties (Object/Units) are applicable in the sales phase.

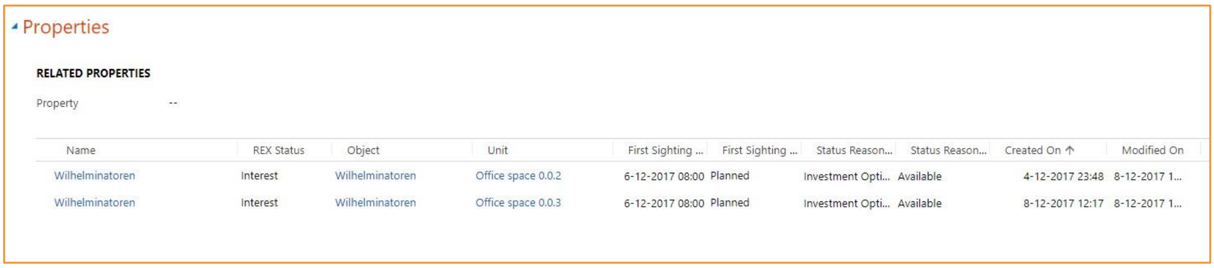


When creating a matschrecord the Object and Unit need to be filled in. If a Deal is a combination of more Objects/Units, then multiple matchrecords needs to be created,.

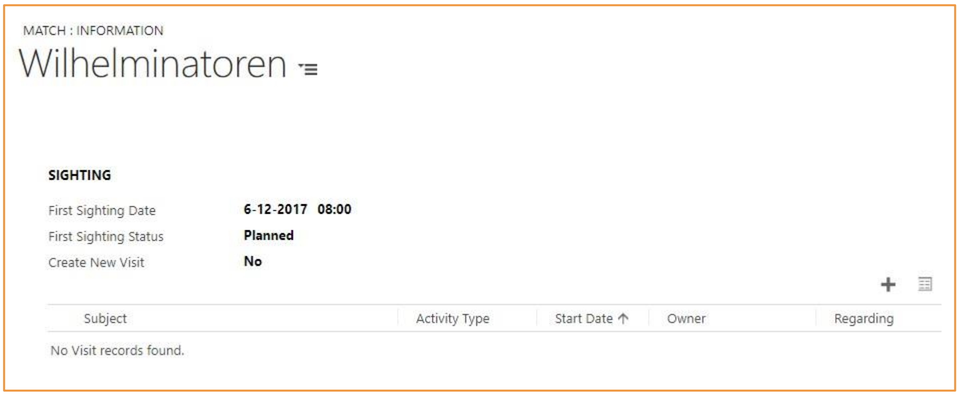
From within the Match record also a visit report can be created. See paragraph Visit Reports.

7.3.2 Visit Reports

Creation of visit reports is done from the related properties records. First the appropriate property/match record needs to be opened.

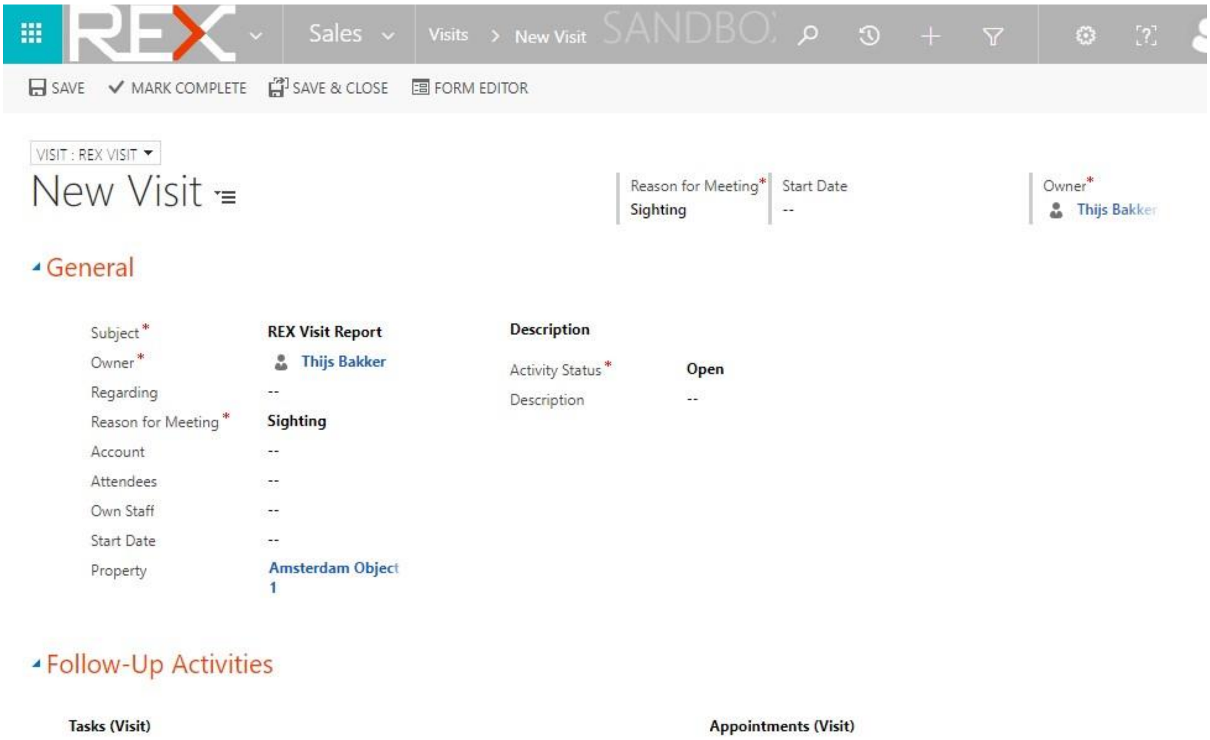


A visit report can be created manually with the plus + icon or automatically if option Create New Visit is set to Yes.

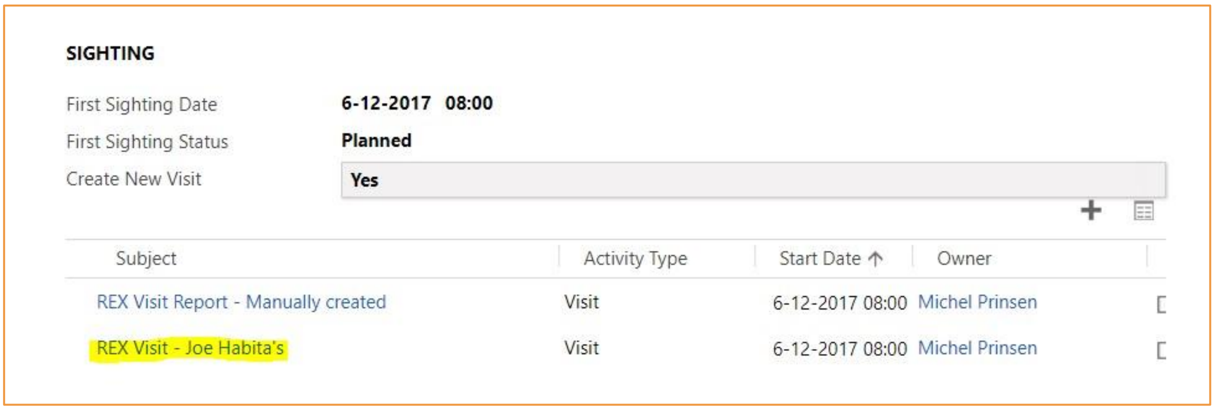


By creating a visit reports manually, a new window opens. Some fields like subject, reason for meeting and startdate are (pre)-filled.

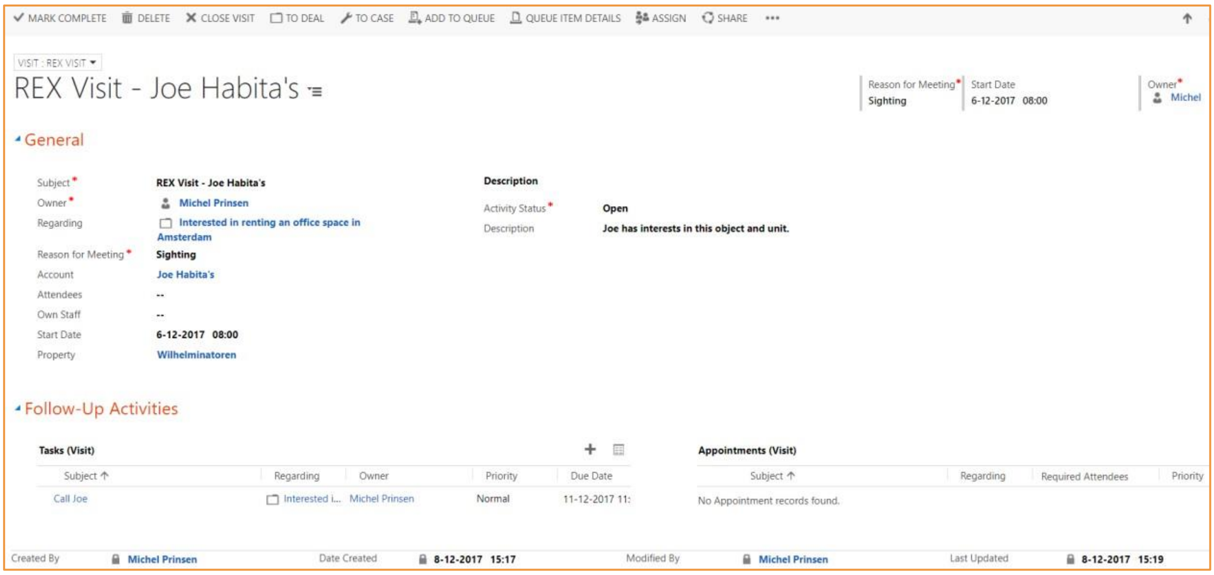
Note: fields regarding and account will be filled when the visit report record is saved.



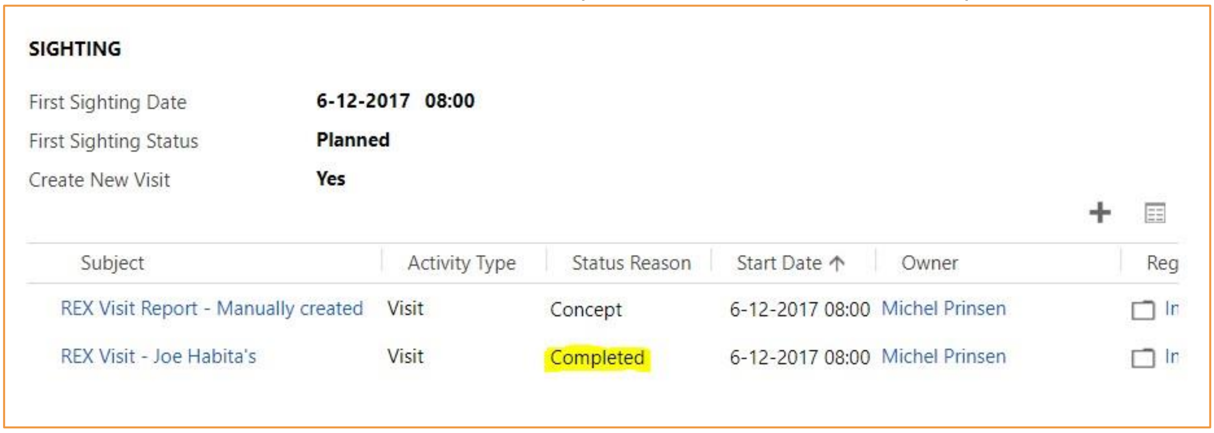
When a visit report is automatically created, the fields are pre-filled.



When opening the created visit report it can be updated with a description and follow-up activities.

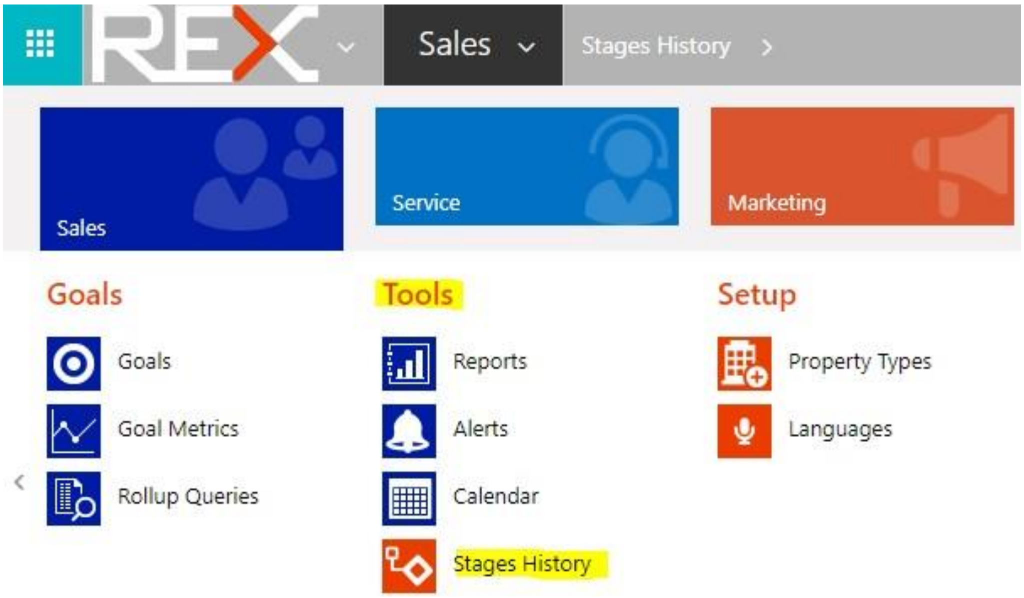


After the visit is done, the record can be completed with button Mark Complete.



7.4 Stage History

The duration of each sales stage is maintained in the Stage History entity. This can be accessed in via the Sales module in the group Tools.



Using different charts the duration of the stages can be visualized.