

REX

DYNAMICS

REAL ESTATE APPS



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

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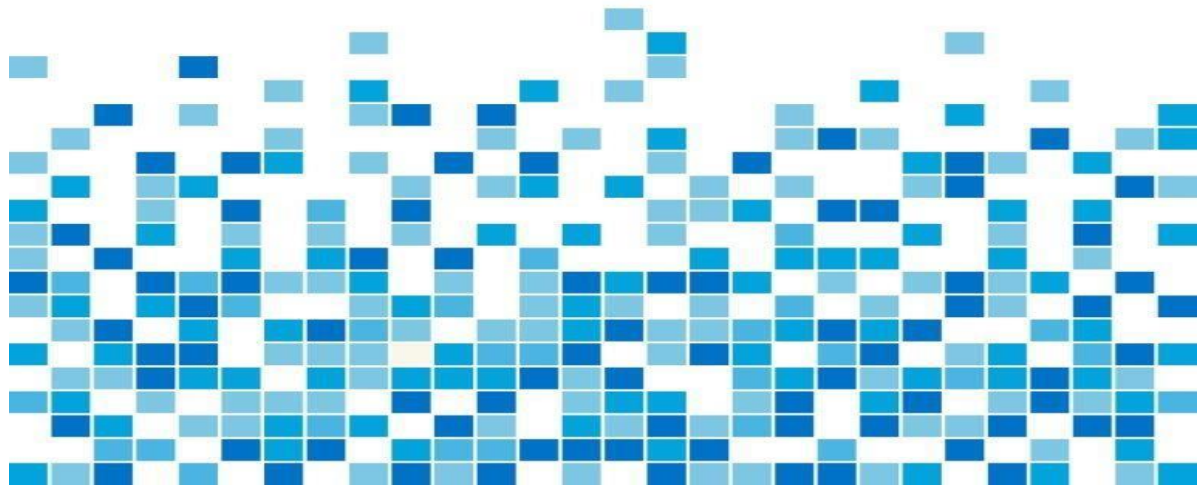
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1.1 REX Versioning

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 guide 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 Outlook (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.

Dynamics 365 for Phones

View Microsoft Dynamics 365 information from your smartphone. [Learn more](#)

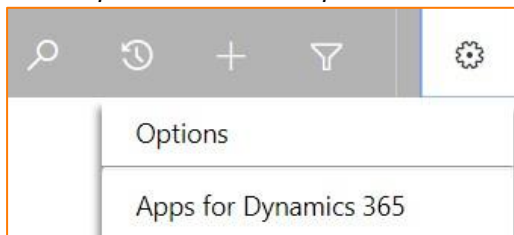


Dynamics 365 for Tablets

View Microsoft Dynamics 365 information from your tablet or Windows PC. [Learn more](#)



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 user account in Office 365. After that, the user needs to have a 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 acquiring property or associate contracts
- Service : Module used for maintaining property
- Tools : Module for reporting and analysis
- Settings : Base entities and users

2 Setup REX for first use

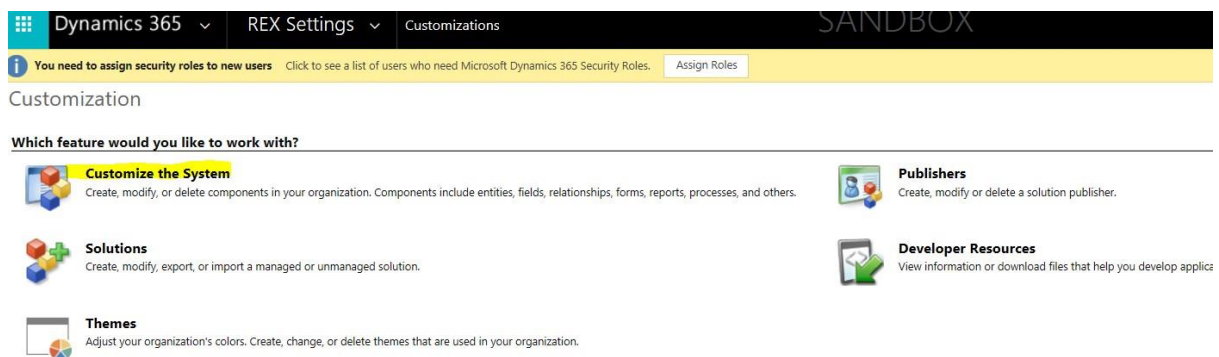
Before using REX a couple of settings needs to be done, these are:

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

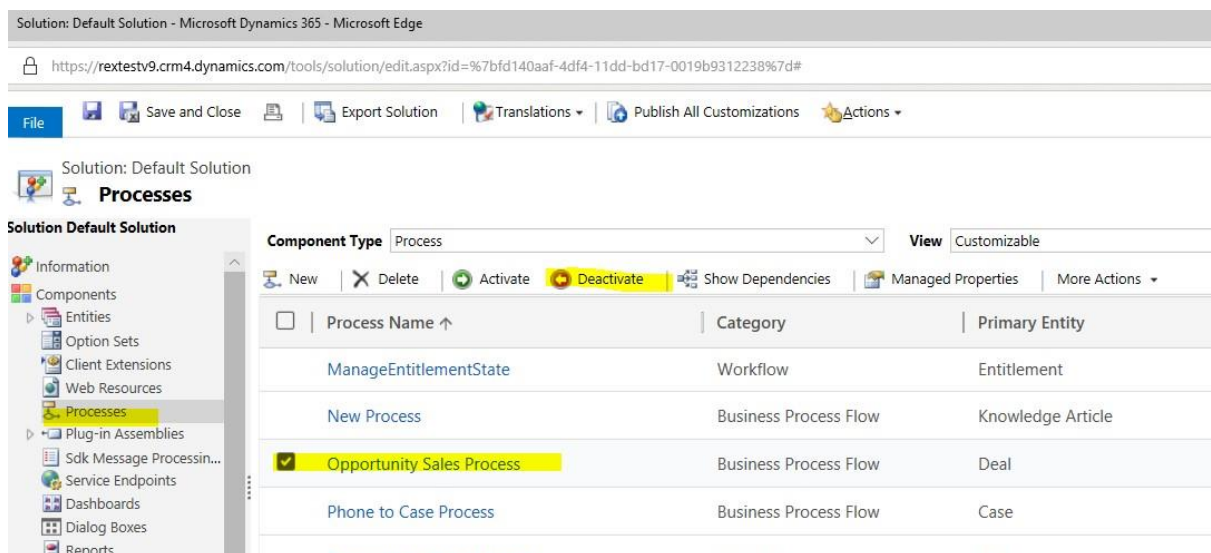
Go to Settings>Customizations

Select Customize the System



Select Processes

Select the Opportunity Sales Process and select Deactivate

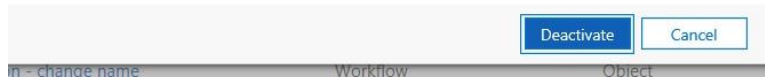


Select Deactivate

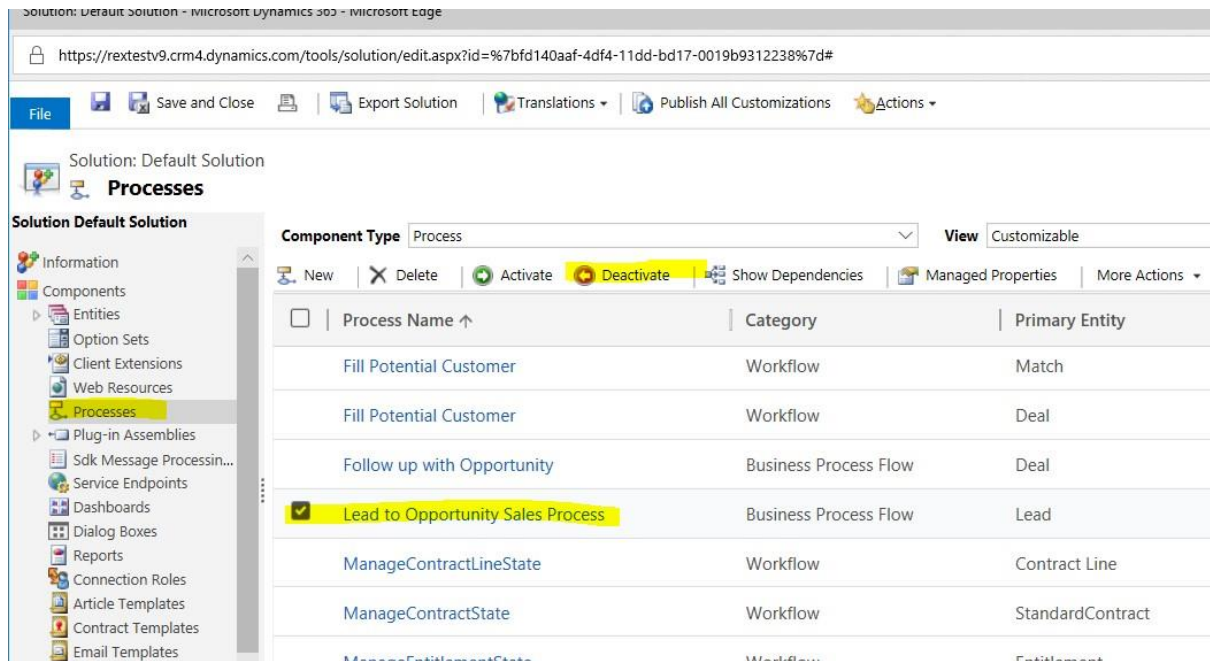
Process Deactivate Confirmation

Do you want to deactivate the selected 1 Process? You can reactivate it later, if you wish.

This action will attempt to deactivate the Process you have selected.



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

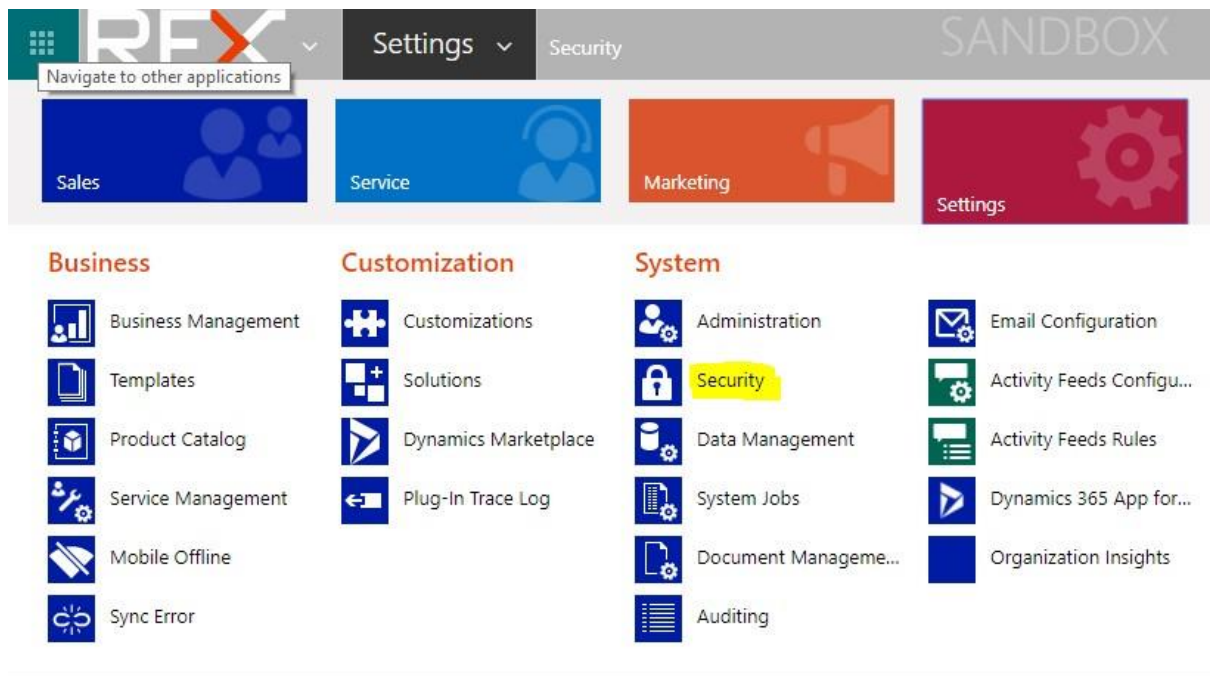


Now that the default processes are deactivated, the REX process can be used.

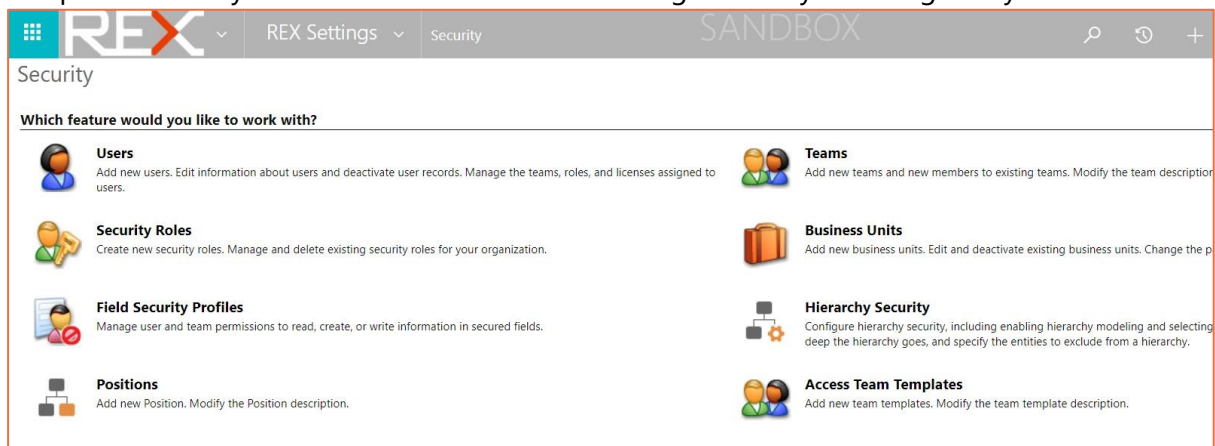
2.2 Assigning Security roles to users

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 systemadministrator. This users has all the rights in REX.

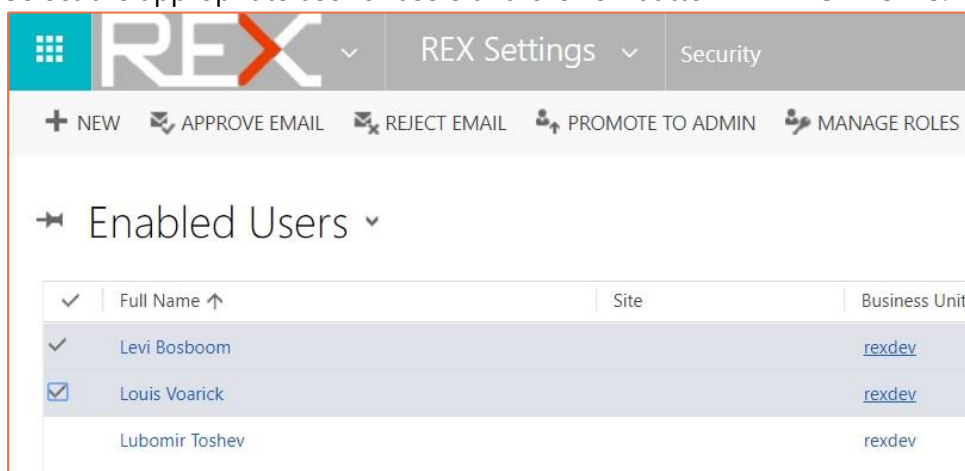
REX Dynamics comes with several out-of-the-box security roles and some specific REX security roles. The *Security Roles* and *Users* entities are accessed in the module REX Settings – Security.



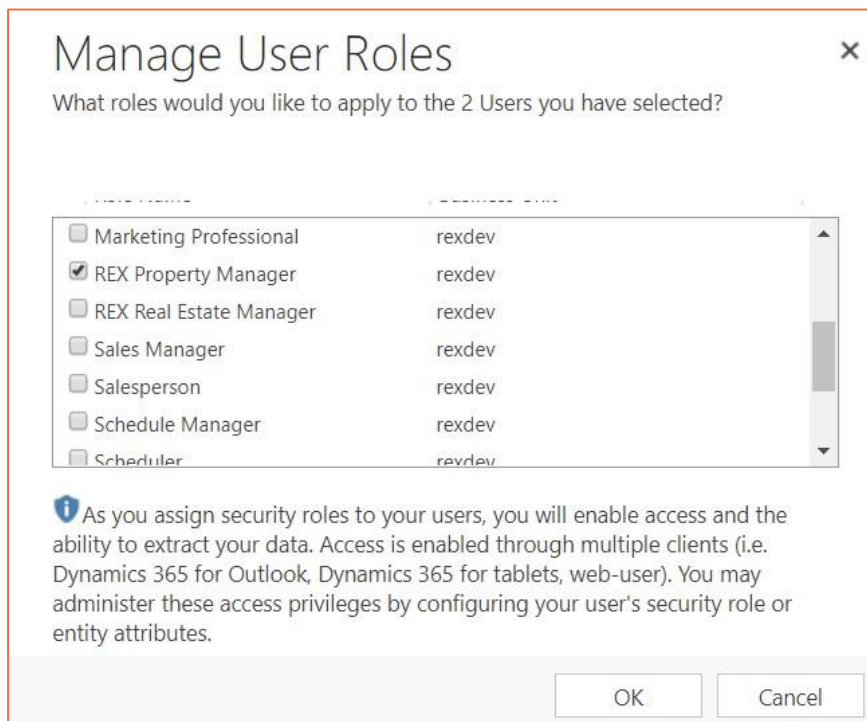
The person with system administrator access can assign roles by selecting entity Users.



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



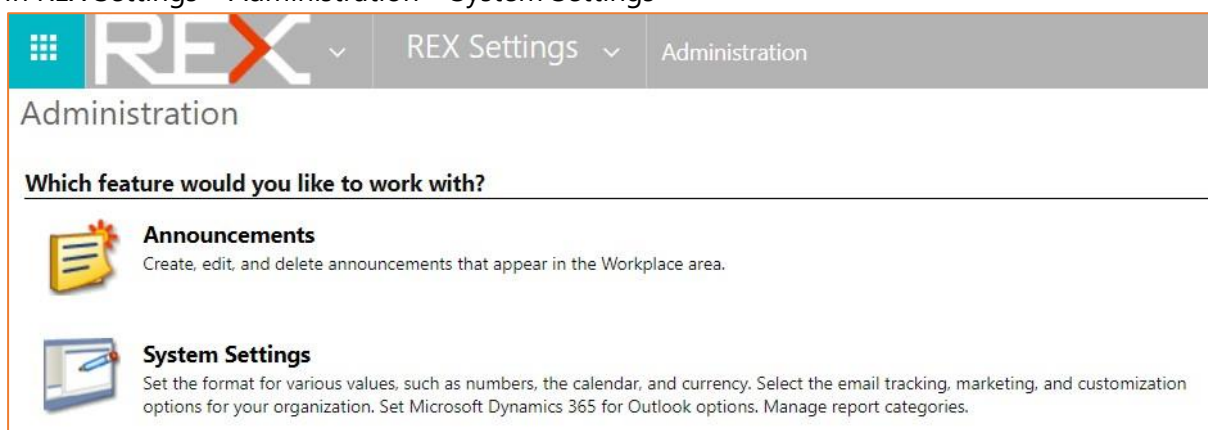
Select the appropriate role(s) and press on OK.



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 recommended 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

System Settings

Set system-level settings for Microsoft Dynamics 365.

General | Calendar | **Formats** | Auditing | Email | Marketing | Customization | Outlook | Reporting | Goals | Sales | Service | Synchronization

Organizational Standards and Formats

Select how Microsoft Dynamics 365 displays number, currency, time, and date formats. Select a format or click Customize to specify custom formats.

Current Format

Dutch (Netherlands) ▼ Customize...

Format Preview

Number	123.456.789,00
Currency	€ 123.456.789,00
Time	13:06
Short Date	11-12-2017
Long Date	maandag 11 december 2017

Select the Current Format for the localized settings.

Tabpage Email

System Settings

Set system-level settings for Microsoft Dynamics 365.

General | Calendar | Formats | Auditing | **Email** | Marketing | Customization | Outlook | Reporting | Goals | Sales | Service | Synchronization

Configure email processing

Select how you want your email processed. If you select server-side synchronization, but are currently using the Microsoft Dynamics 365 Email Router, the Email Router will be blocked for email processing. We recommend that you disable the Email Router before selecting server-side synchronization.

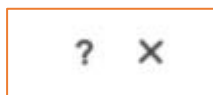
Process Email Using: Server-Side Synchronization ▼

Configure default synchronization method

The selected settings will be applied to mailboxes of all newly created users and queues

Server Profile	Microsoft Exchange Online
Incoming Email	Server-Side Synchronization or Email Router ▼
Outgoing Email	Server-Side Synchronization or Email Router ▼
Appointments, Contacts, and Tasks	Microsoft Dynamics 365 for Outlook ▼

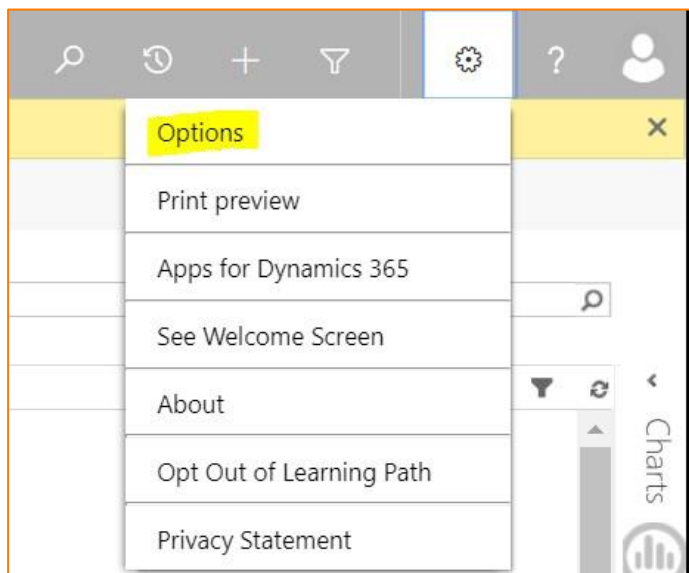
Select the default Server Profile to use and processing method between REX and Exchange.



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

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.

Set Personal Options

Change the default display settings to personalize Microsoft Dynamics 365, and manage your email templates.

General Synchronization Activities **Formats** Email Templates Email Signatures Email Languages

Personal Standards and Formats
Select how Microsoft Dynamics 365 displays number, currency, time, and date formats. Select a format or click Customize to specify custom formats.

Current Format
Dutch (Netherlands) Customize...

Format Preview

Number	123.456.789,00
Currency	€ 123.456.789,00
Time	10:38
Short Date	4-12-2017
Long Date	maandag 4 december 2017

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

Set Personal Options

Change the default display settings to personalize Microsoft Dynamics CRM, and manage your email templates.

General Synchronization Activities Formats Email Templates **Email** Privacy Languages

Select whether other users can send email for you
☐ Allow other Microsoft Dynamics CRM users to send email on your behalf.
Important: If you choose this option, other Microsoft Dynamics CRM users will be able to send email messages with or without your knowledge that display you as the sender.

Select the email messages to track in Microsoft Dynamics CRM
Track Email messages in response to CRM email

[Configure Folder Tracking Rules](#)

Automatically create records in Microsoft Dynamics CRM
☐ Create Contacts from the sender or organizer of tracked email messages and meetings.

[View your Mailbox](#)

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.

Automatically create records in Microsoft Dynamics CRM

☐ Create Contacts from the sender or organizer of tracked email messages and meetings.

[View your Mailbox](#)

OK Cancel

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.

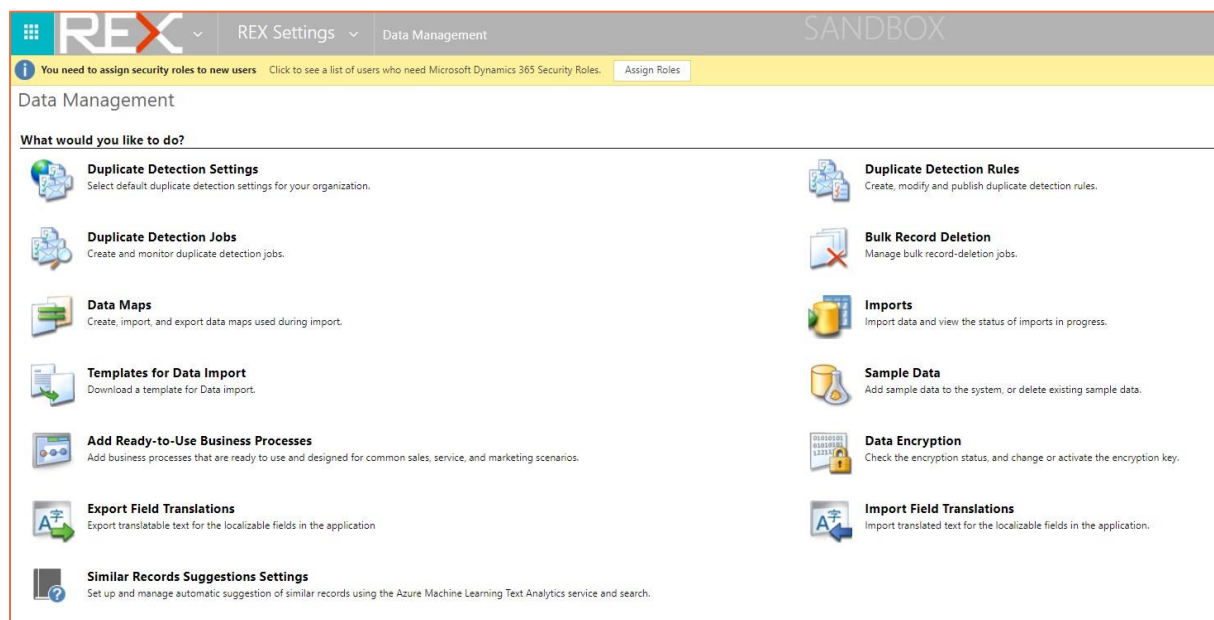
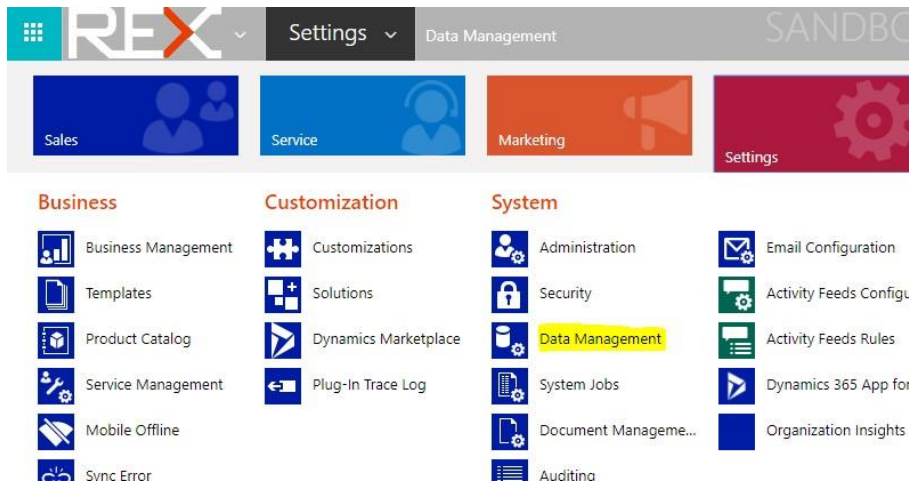
2.5.1 Filling data manually

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.

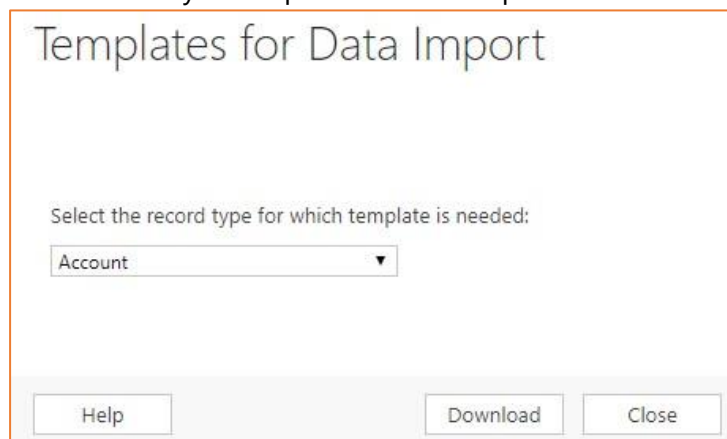
After the data in the base entities is available, data in dependent entities like Deals, Cases, Contracts, Objects and Units can be filled.

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.

Account Name	REX Type	Account Number	Main Phone	Email

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

Import Name	Status Reason	Successes	Errors	Partial Failures	Total Proc...	Created On
Active Accounts export.xlsx	Completed	0	0	0	0	21-6-201
Active Accounts export.xlsx	Completed	0	0	0	0	21-6-201
8. Unit.csv	Completed	32	4	0	36	19-12-201

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:

Geen bestand gekozen

Supported file types: XML Spreadsheet 2003 (.xml), .csv, .txt, .xlsx, and .zip



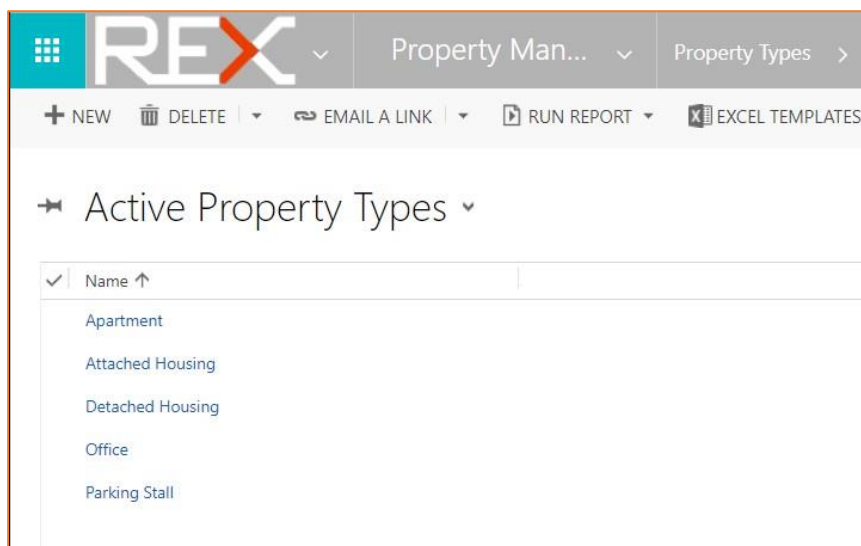
Drag your file here

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.



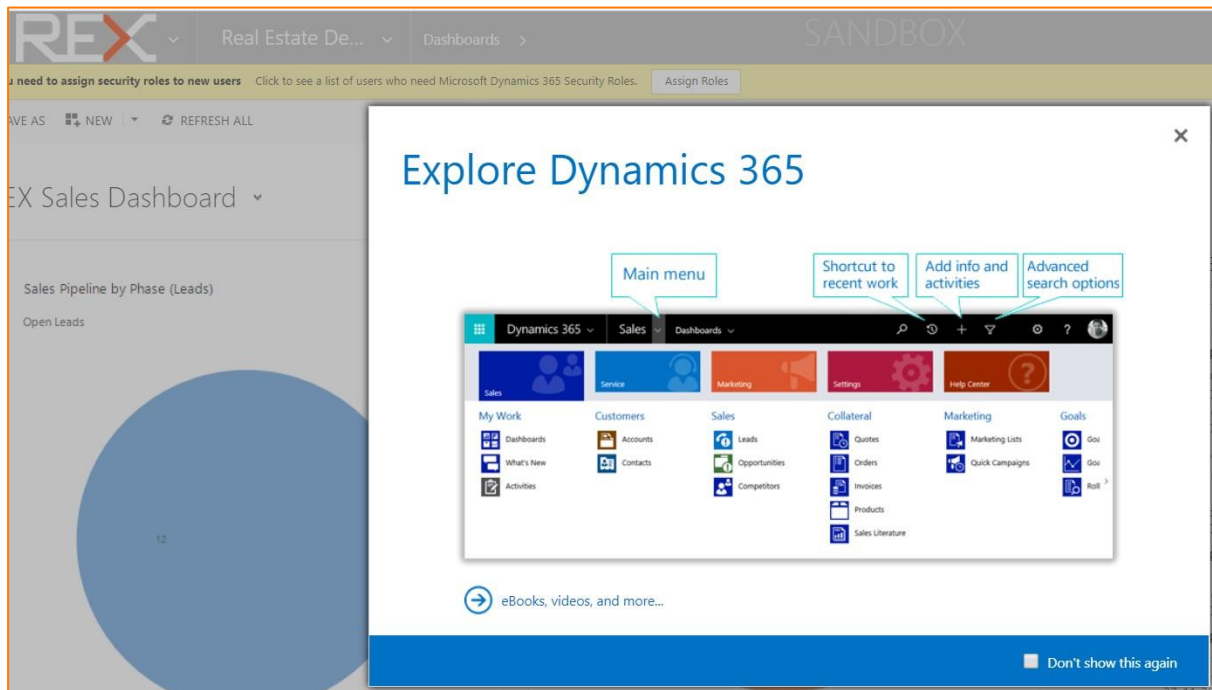
With buttonNEW the records can be created.



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.



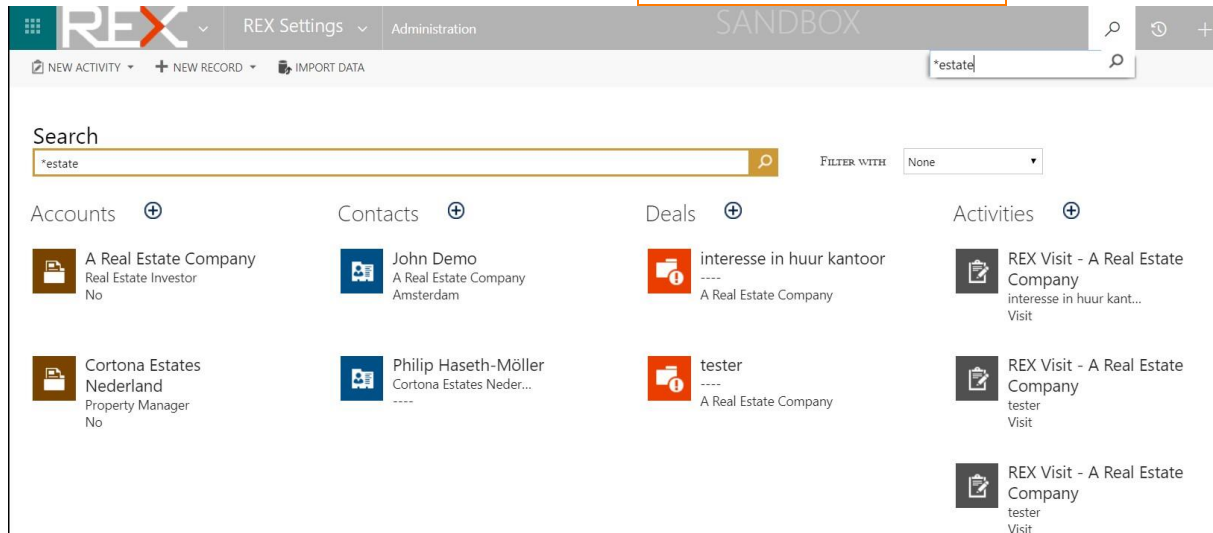
Navigating in REX is done by using the menu options on the top of the screen. This menu bar contains a couple of options:



-  Navigate to other office apps / office 365
-  Select other Dynamics CRM apps
-  Select the REX Module
-  Select the recently viewed items
-  The magnifying glass  is used to do a quick global search on accounts, contacts, deals, activities, etc (see System settings 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*

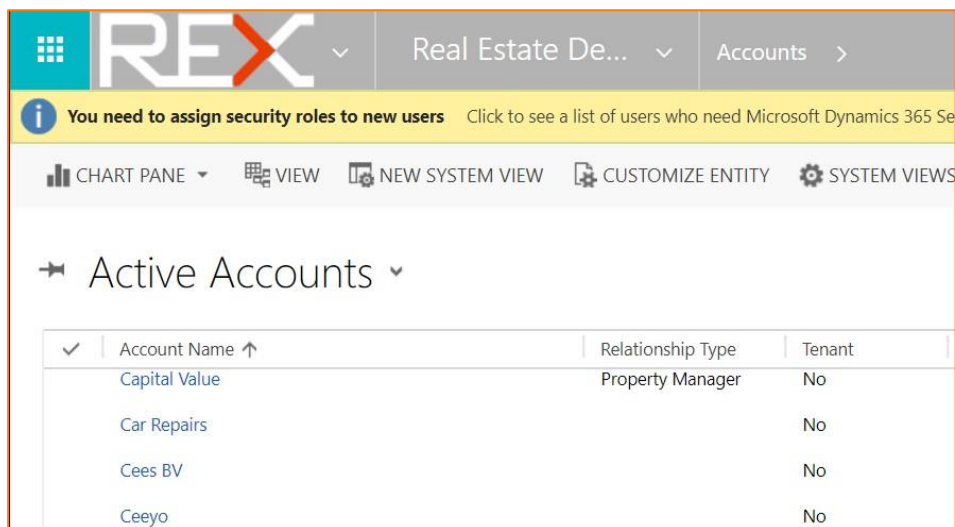
When working in Dynamics 365 the first thing to determine is in which module will be worked. For REX applies that almost all relevant menu options can be found under modules Real Estate Deals and Property Management. The CRM modules are accessed by selecting the  symbol and then the module, see the example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

Main Modules



- Dashboards : Overview of different records from different menu options
- Activities : Overview of planned / completed operations (tasks, appointments etc.)
- 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 than leads
- Visits : Visit Report associated at deals etc.
- Objects : Property (buildings etc) which 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 filter symbol, located right of the view "Active Accounts", a different view can be selected.

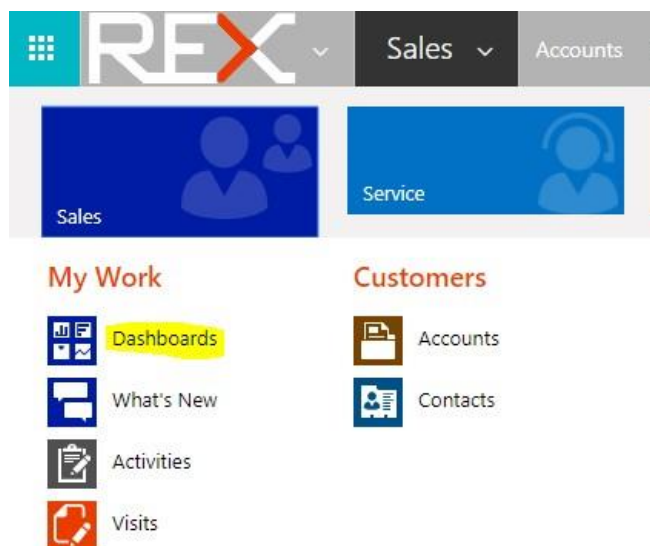


REMARK: Each user can display its own preferred view by using the pushpin. This will then be displayed by default.

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

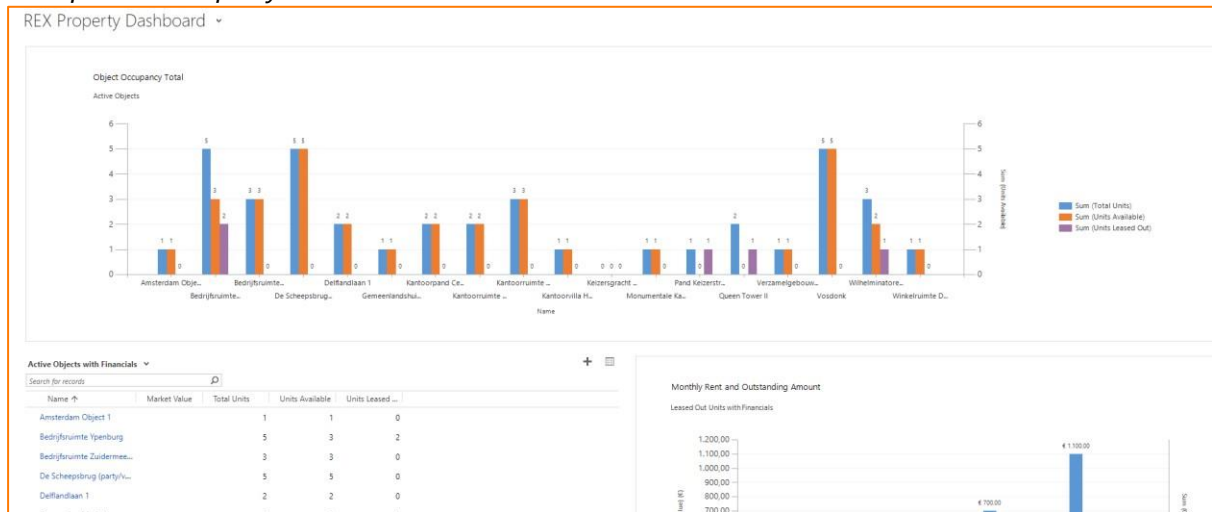
Dashboards can be accessed both the Sales and Service modules.



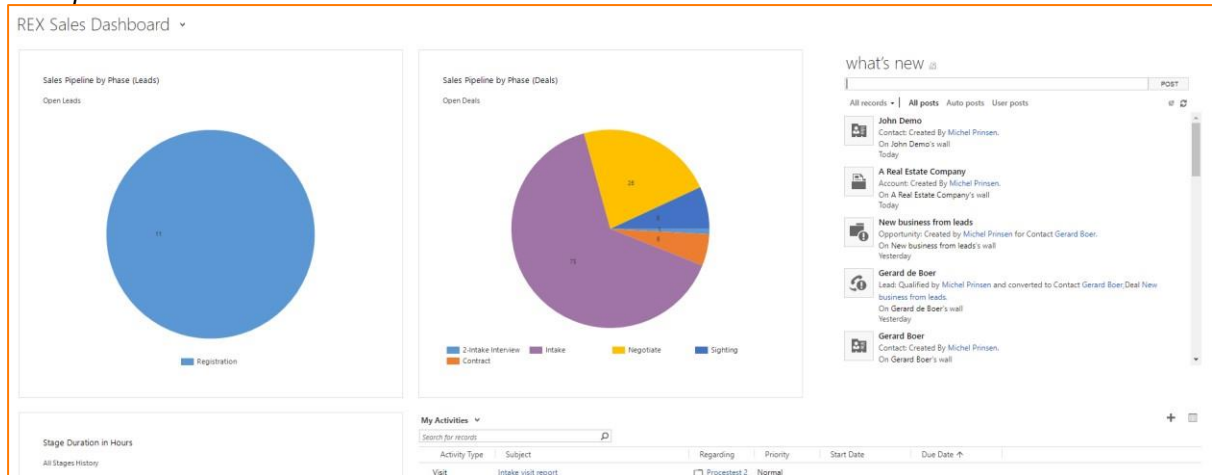
Next to the many Dynamics 365 dashboards REX is equipped with 3 custom dashboards:

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

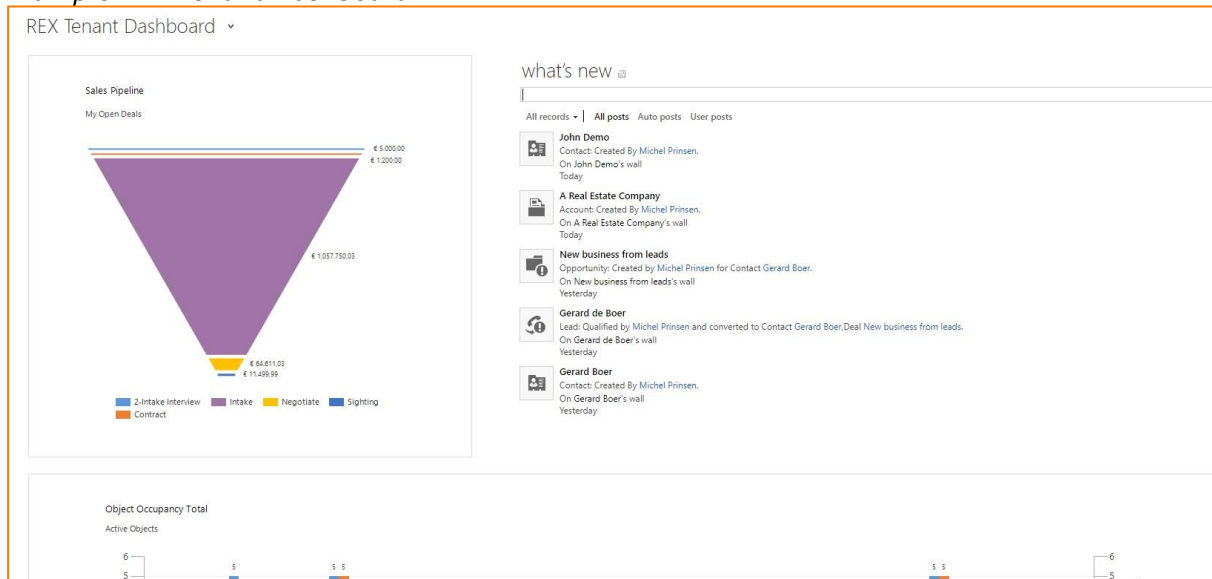
Example REX Property Dashboard



Example REX Sales Dashboard



Example REX Tenant Dashboard

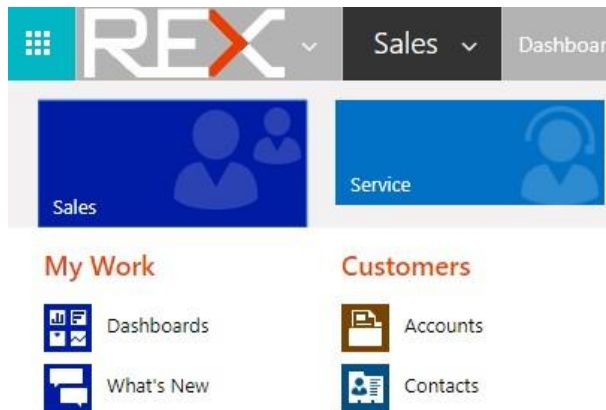


4 Accounts and Contacts

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, Contractors, Governments 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.

The screenshot shows a Dynamics 365 account record for 'A Real Estate Company'. The interface includes a top navigation bar with buttons like NEW, DEACTIVATE, CONNECT, ADD TO MARKETING LIST, ASSIGN, EMAIL A LINK, DELETE, FORM, and PROCESS. The account details are organized into several sections:

- Summary:** Shows 'No. of Employees' as '...' and 'Owner' as 'Michel'.
- ACCOUNT INFORMATION:**
 - Account Name: A Real Estate Company
 - Phone: 030-4565544
 - Email: info@arealestatecompany.nl
 - Website: https://www.arealestatecompany.nl
 - Parent Account: --
 - Tenant: No
 - Relationship Type: Real Estate Investor
 - Account Number: --
- ADDRESS:**
 - Visiting Address: Demostreet 1, 1065 DD Amsterdam, Netherlands
 - Copy Address: Yes
 - Mailing Address: Demostreet 1, 1065 DD Amsterdam, Netherlands
- POSTS, ACTIVITIES, NOTES, ONENOTE:** A list of activities including 'Negotiate', 'Sighting', and 'REX Visit - A Real Estate Company'.
- Primary Contact:** John Demo, with email johndemo@test.nl and phone 030-4565544.
- CONTACTS:** A table with columns for Full Name and Email, showing John Demo.
- CONNECTIONS:** A table with columns for Connected To, Role (to), and Description, showing no connection records.

Information on the form is structured as follows:


- Information on the record itself like address-, relationship- and contact information
- 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**.

The 'Assign Account' dialog box is shown, asking 'You have selected 1 Account. To whom would you like to assign it?'. It contains two input fields: 'Assign to' with the value 'Me' and 'User or team' with a dropdown arrow. At the bottom, there are 'Assign' and 'Cancel' buttons.

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


Primary Contact
--

CONTACTS + 

Full Name ↑	Email
No Contact records found.	

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


Contact ✕

Details		Contact Information		Address	
First Name*	John	Email	johndemo@test.nl	Street 1	Demostraat 1
Middle Name	--	Mobile Phone	064545455	Street 2	--
Last Name*	Demo	Business Phone	030-4565544	City	Amsterdam
Job Title	Manager	Description	This is a demo contact	ZIP/Postal Code	1065 DD
Account Name	 A Real Estate Company				

Save Cancel

With button **SAVE** the contact is created.


Primary Contact
--


CONTACTS + 


Full Name ↑	Email
John Demo	johndemo@test.nl

Also a Primary contact can be selected on the account form. Now the contact details are shown instantly on the account form.

Primary Contact
John Demo

 Email johndemo@test.nl

 Business 030-4565544

CONTACTS + 

Full Name ↑	Email
John Demo	johndemo@test.nl

4.3 Contacts

+ NEW - DELETE EMAIL A LINK RUN REPORT EXCEL TEMPLATES EXPORT TO EXCEL IMPORT DATA			
Active Contacts			
✓	Full Name ↑	Email	Company Name
	a boer		
	A. Buzert	alexander@testinfraholdin...	Infra Holding B.V.
	A. Vrolijk	anna@testvrolijk.nl	C.F. Vrolijk Beheer BV
	Adri Brussé	adri@testbrussevastgoed.c...	Brussé Vastgoed
	Alex Boer		
	Alfred De Jonge	adejong@test.nl	Jongejonge B.V.
	Andre Vos	andre@testhsb.nl	HSB Bouw

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.

CONTACT: REX CONTACT

John Demo

Summary

CONTACT INFORMATION

Full Name * John Demo

Gender --

Language --

Initials --

Job Title Manager

Account Name A Real Estate Company

Email johndemo@test.nl

Business Phone 030-4565544

Mobile Phone 064545455

Sync address from acc No

Address Demostreet 1
1065 DD Amsterdam
Netherlands

POSTS ACTIVITIES NOTES

Enter post here POST

All posts Auto posts User posts

John Demo
Contact: Created By Michel Prinsen.
On John Demo's wall
Today

Company A Real Estate Company

RECENT CASES

Case Title Case Number F

No Case records found.

RECENT OPPORTUNITIES

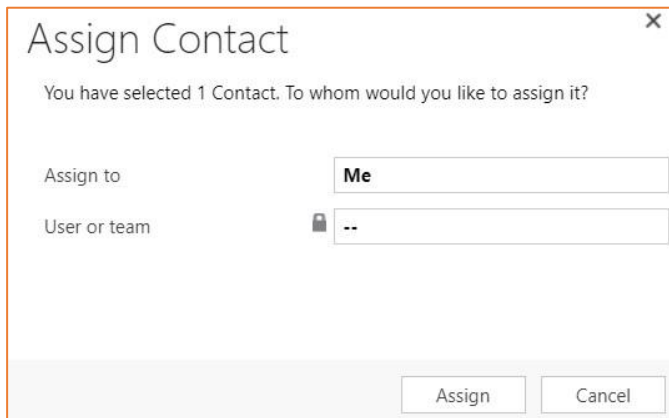
Topic Contact Status ↑

No Deal records found.

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

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.

A screenshot of a 'Assign Contact' dialog box. The title bar says 'Assign Contact' with a close button (X) in the top right corner. Below the title, it says 'You have selected 1 Contact. To whom would you like to assign it?'. There are two input fields: 'Assign to' with the value 'Me' and 'User or team' with a lock icon and the value '--'. At the bottom right, there are two buttons: 'Assign' and 'Cancel'.

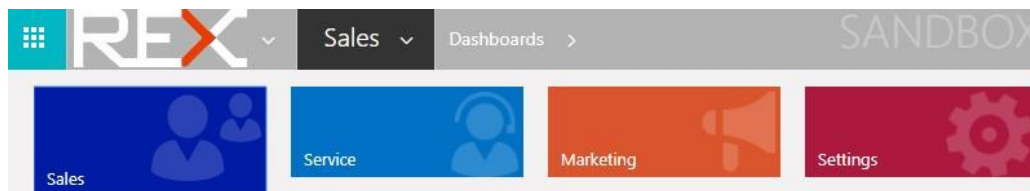
5 Objects, Units and Contracts

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 preferred Match record is maintained/contracted.

5.2 Objects

Objects are used for storing property specific information.



My Work

- Dashboards
- What's New
- Activities
- Visits

Customers

- Accounts
- Contacts

Sales

- Leads
- Deals
- Competitors

Real Estate

- Objects
- Units
- Contracts
- Valuations




Active Objects with Available Units

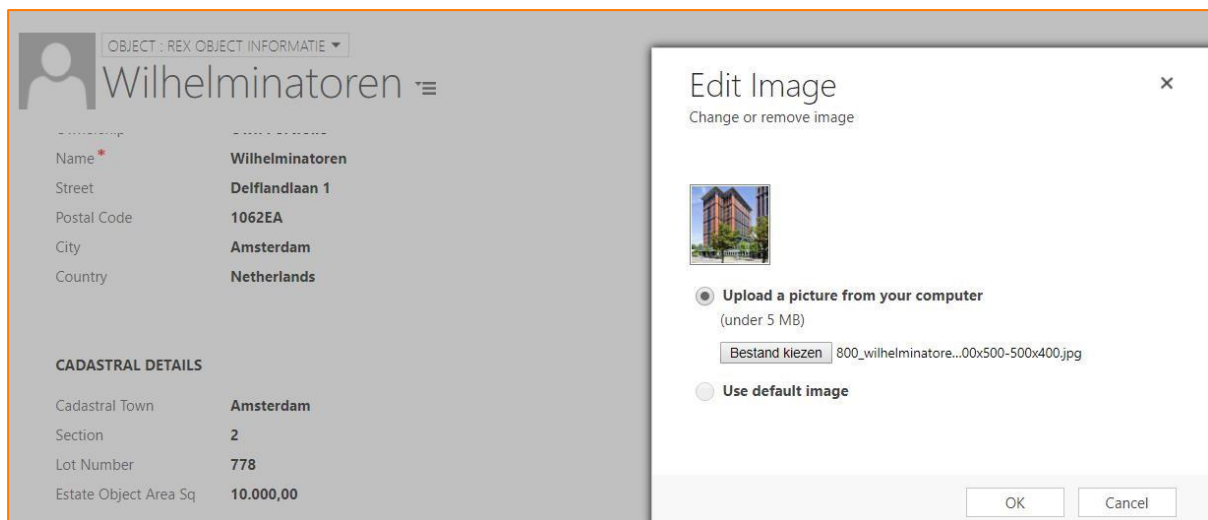
✓	Name ↑	Property Type	Status Reason	Total Units	Units Available	Total Rental Units	Units Leased Out
	Amsterdam Object 1		Investment Opti...	1	1		0
	Bedrijfsruimte Ypenburg	Office	Investment Opti...	5	3		2

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

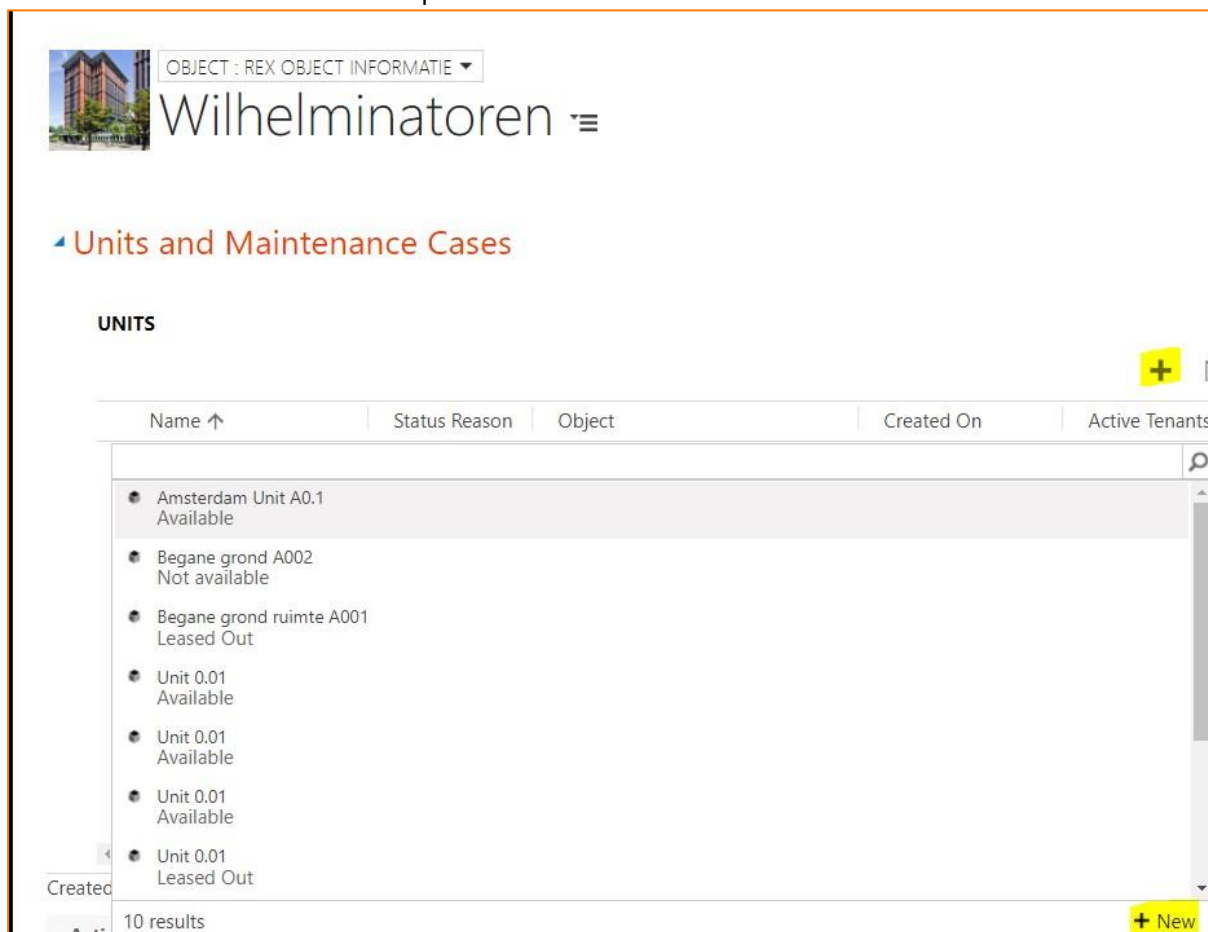
Object Number, Property Type, Name, Address and Cadastral details. After filling in the fields, the object record can be saved using Ctrl-S or the SAVE button.

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 appropriate picture and 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.

UNIT : REX UNIT INFORMATIE

New Unit

Created On: 4-12-2017 13:43

Status Reason: Available

General

Unit Number: --

Name: --

Object: **Wilhelminatoren**

Property Type: **Office**

Street: **Delflandlaan 1**

Postal Code: **1062EA**

City: **Amsterdam**

Country: **Netherlands**

Owner: **Michel Prinsen**

CADASTRAL DETAILS

Cadastral Town: **Amsterdam**

Section: **2**

Apartment Serial Num: --

Lot Number: **778**

Office / Living Area St: --

ACTIVITIES

Subject	Regarding	Activity Type
To enable this content, create the record.		

UNIT INFORMATION

Status Reason	Available
Renovation	No
Area Squared	--
Property Valuation (Points)	--
Net Rent (Month)	--
Facility costs	--
Service Costs	€0,00
Gross Rent (Month)	--
Deposit	--
Active Option Holders	0
Active Tenants (Accounts)	0
Active Tenants (Individuals)	0

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

Created On: 4-12-2017 13:43

Status Reason: Available

Active Option Holders	0
Active Tenants (Accounts)	0
Active Tenants (Individuals)	0

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. Statuses 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.

UNIT : REX UNIT INFORMATIE ▾

Office space 0.0.1 ▮

Created On 4-12-2017 13:43 Status Reason Available

DETAILS

STAKEHOLDERS

Connected To ↑	Role (To)	Description
No Connection records found.		

CONTRACTS / LEASES

Name/Reference	Renewal Date ↑	Contract Num...	Status Reason	Objec
No Contract records found.				

CASES

Case Title ↑	Case Number	Priority	Origin
--------------	-------------	----------	--------

INVOICES

Name ↑	Status Reason	Total Amount	Customer
--------	---------------	--------------	----------

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.

REX ▾ Property Man... ▾ Contracts > SANDBOX

You need to assign security roles to new users Click to see a list of users who need Microsoft Dynamics 365 Security Roles. Assign Roles

+ NEW DELETE EMAIL A LINK RUN REPORT EXCEL TEMPLATES EXPORT TO EXCEL IMPORT DATA CHART

Active Contracts ▾

✓	Name/Reference	Renewal Date ↑	Contract Number	Status Reason	Object	Unit	Account Contact
	Test Contract 2			Concept			
	Test Lease Contract			Signed - REXLin...	Pand Keizerstraa...	Unit 0.03	
	Lease Contract Test			Signed - REXLin...			
	Lease Contract			Offered - REXLin...			
	Jack Jackson			Concept	Pand Keizerstraa...	Unit 0.03	Jack Jackson
	Jan de Huurder			Concept	Pand Keizerstraa...	Unit 0.03	Jan Huurder

A contract can have the following statuses:

- Concept
- Offered – REX Linked

- Signed– REXLinked

CONTRACT - REX CONTRACT INFORMATION

Test Lease Contract

Start Date: 1-11-2016 | Account: Account Testnaam | Individual: -- | Owner: Steven

General

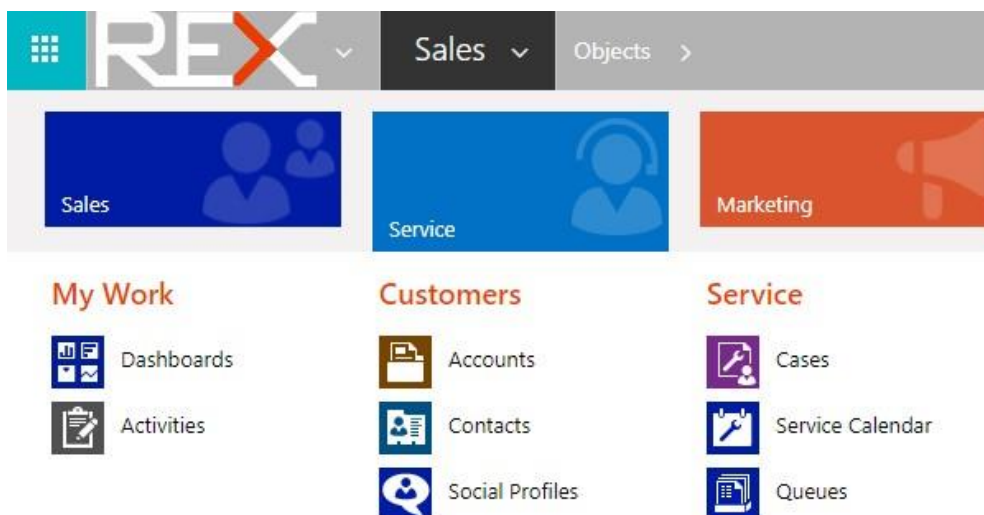
CONTRACT BASE DATA		ACTIVITIES	NOTES	CONTRACT TERMS	
Contract Number	235235	All	↓ Add Ph... Add Task ***	Start Date	1-11-2016
Contract Type	Lease	We didn't find any activity records.		Contract Durations	--
Business / Consume	Business			End Date	1-3-2017
Name/Reference	Test Lease Contract			Lease Period	1 Month
Account	Account Testnaam			Notice Term	--
Account Contact	--			Extension Period	--

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.

UNIT : REX UNIT INFORMATIE ▾

Office space 0.0.1 ▾

CASES

Case Title ↑	Case Number	Priority
Dak Lekt Account Testnaam Bedrijf 2		

[Look Up More Records](#)

1 result + New

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.

Case

Case Details	Other Details	Description
Customer * Ceeyo	Origin	The door is broken
Case Title * Door office room is broken	Product	
Subject Default Subject	Entitlement	
Case Type Problem	First Response By	
Contact --	Resolve By	
Assign to Others * Michel Prinsen		
Parent Case --		

Save Cancel

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.

UNIT : REX UNIT INFORMATIE ▾

Office space 0.0.1 ▾

CASES

Case Title ↑	Case Number	Priority
Door office room is broken	CAS-00001-X0T5M5	Normal

Opening the case shows the case form. On this form additional case information can be added or associated 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.

The screenshot shows the REX software interface. At the top, there's a navigation bar with 'Property Man...' and 'Cases'. The main header displays the case title 'Door office room is broken' with a menu icon. To the right, it shows 'Priority: Normal', 'Created On: 4-12-2017 15:59', 'Status: In Progress', and 'Owner: Michel'. Below the header is a progress bar with three stages: 'Identify (Active for 1 minute)', 'Research', and 'Resolve'. The 'Identify' stage is currently active. Under 'Identify', there are checkmarks for 'Find Customer', 'Find Contact', and 'Find Case', each with a corresponding action: 'Ceeyo', 'click to enter', and 'Door office room is broken'. A 'Next Stage' button is visible. The bottom section is titled 'Summary' and contains 'CASE DETAILS' (Type, Object, Unit, Customer, Contact / Tenant) and 'CUSTOMER DETAILS' (Ceeyo, Primary Contact: Michel Prinsen, Email: michel.prinsen@ceeyo.nl). There are also tabs for 'POSTS', 'ACTIVITIES', 'KB RECORDS', and 'NOTES'.

By using the Business Process Flow the case representative is guided through the necessary 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.

This screenshot shows the same case 'Door office room is broken' but now in the 'Resolve' phase. The progress bar shows 'Identify' and 'Research' as completed, and 'Resolve (Active for 1 minute)' as the current phase. Below the progress bar, there are buttons for 'Resolve Case' and 'Mark resolved'. The 'Next Stage' button has been replaced by a 'Finish' button. The 'Summary' section remains the same.

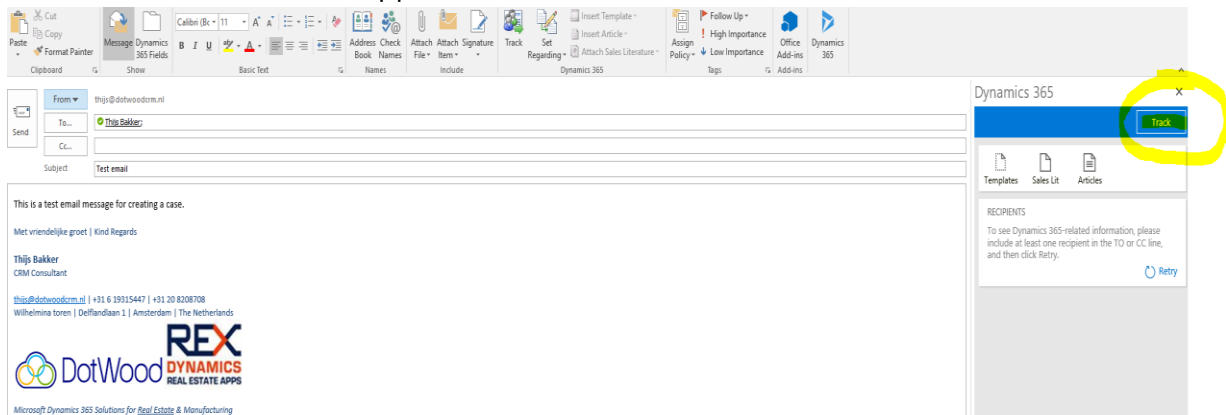
The case close form is shown. After filling in the required and wanted information, the case can be closed with button Resolve.

The 'Resolve Case' dialog box is shown. It contains the following fields: 'Resolution Type' with a dropdown menu showing 'Problem Solved'; 'Resolution' with a text input field containing 'Mechanic has placed new door'; 'Total Time' with a dropdown menu showing '0 minutes'; 'Billable Time' with a dropdown menu showing '2 hours'; and 'Remarks' with a text area containing 'Internal hours only, used for reporting purposes.' At the bottom, there are two buttons: 'Resolve' and 'Cancel'.

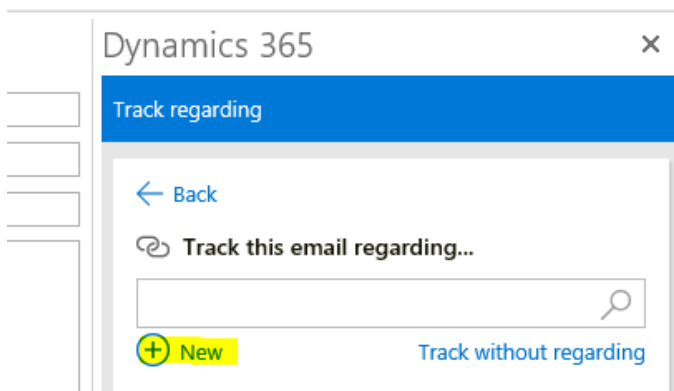
Example of a closed case

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.

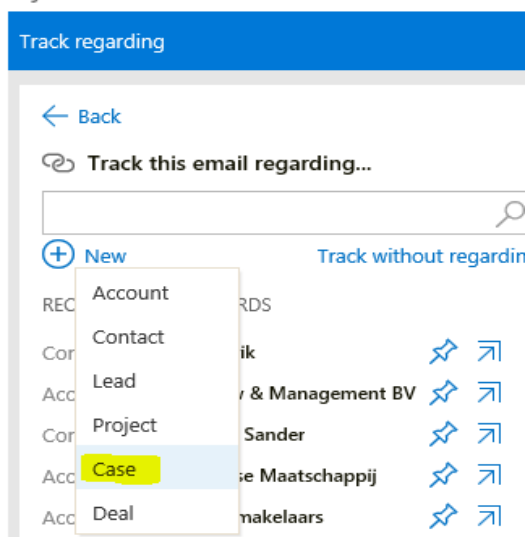


Then click the “NEW” button



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

Dynamics 365



Dynamics 365

Er wordt een pop-up geblokkeerd. Klik hier als u deze pop-up of extra opties wilt weergeven....

Tracking pending RE: [Test email](#) [Change](#)

Templates Sales Lit Articles

REGARDING CASE
Test email

Created On **11-4-2018 13:13**

Status Reason **In Progress**

Owner **Bakker, Thijs**

RECIPIENTS

To see Dynamics 365-related information, please include at least one recipient in the TO or CC line, and then click Retry.

[Retry](#)

Then the fields of the case need be filled manually.

Track Set Regarding Dynamics 365

Insert Template ~
 Insert Article ~
 Attach Sales Literature ~

Follow Up ~
 High Importance
 Low Importance

Assign Policy ~
 Tags

Office Add-ins
 Add-ins

Dynamics 365

Dynamics 365

CREATE CASE

Customer *

Case Title *

Subject

Case Type *

Contact

Assign to Others * [Bakker, Thijs](#)

Parent Case

Origin *

Product

Entitlement

First Response By

Resolve By

Description *

☐ Open record after saving

[Save](#) [Cancel](#)

Items: 75

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.

My Active Cases

✓	Case Title ↑	Case Number	Status Reason	Customer
	Test email	CAS-01265-P6V1D0	In Progress	CERTINA AG

DotWood Service Cases Test email

SAVE & ROUTE NEW CREATE CHILD CASE RESOLVE CASE CANCEL CASE ADD TO QUEUE QUEUE ITEM DETAILS ASSIGN DO NOT DECREMENT ENT...

Case: Test email

Priority: -- Created On: 11-4-2018 13:13 Status: In Progress Owner: Bakker, Th

Identify (Active for 2 minutes) Research Resolve

Find Customer: CERTINA AG
Find Contact: click to enter
Find Case: Test email

Phone to Case Process - DotWood (Active for 2 minutes) Next Stage

Summary

CASE DETAILS

Case Title: Test email
ID: CAS-01265-P6V1D0
Priority: --
Customer: CERTINA AG
Contact: --
Case Type: --
Origin: Microsoft
First Response Sent: No
Follow Up By: --
Entitlement: --
Product: --

POSTS ACTIVITIES KB RECORDS NOTES

ALL | Add Phone Call Add Task

Low/Normal Cases Support
Case with number CAS-01265-P6V1D0 has been created
Today

RECENT CASES

Status	Case Title
Active	Test email

ENTITLEMENTS

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 sales process consist of different phases and steps.

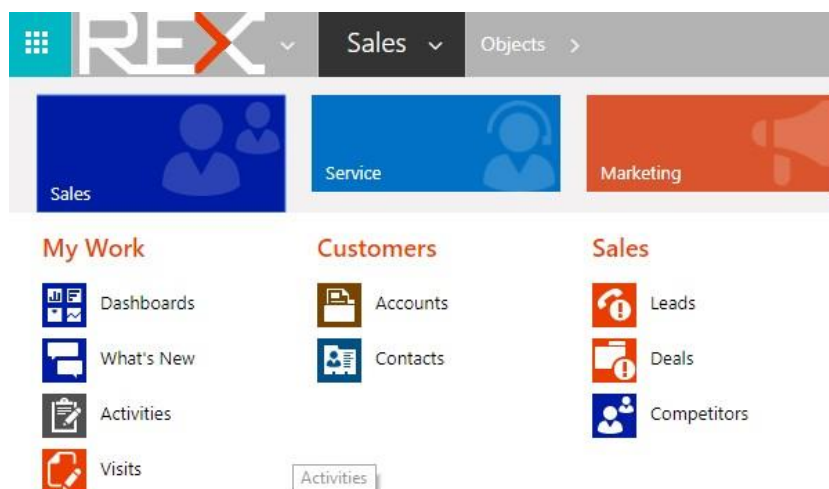


The duration of theses different stages are saved in the Stage History entity. This is done for Reporting/Analysis purposes. See paragraph [Stage History](#) for more details.

The next paragraphs further describes the Lead and Deal process.

7.2 Leads

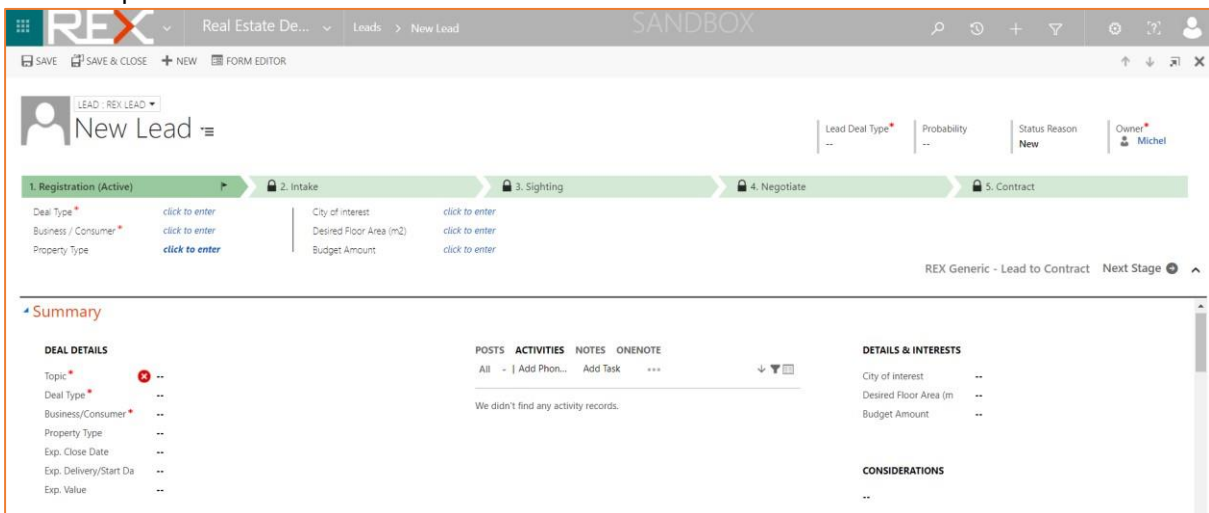
Leads are maintained in the Leads entity which is available in the Sales module.



With button NEW a new lead record is created.



A Business Process Flow is used to guide the responsible user through 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 Property(ies)

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.

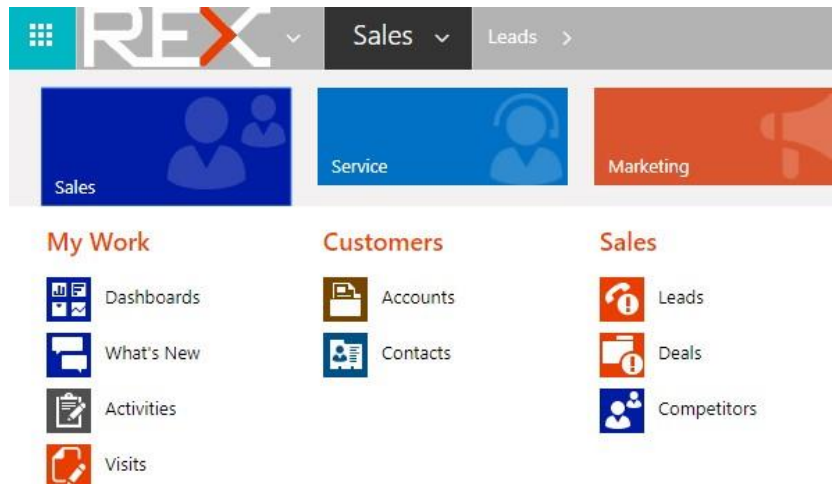
In the Match record the Object and Unit need to be filled. The match can have one of the following statuses:

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

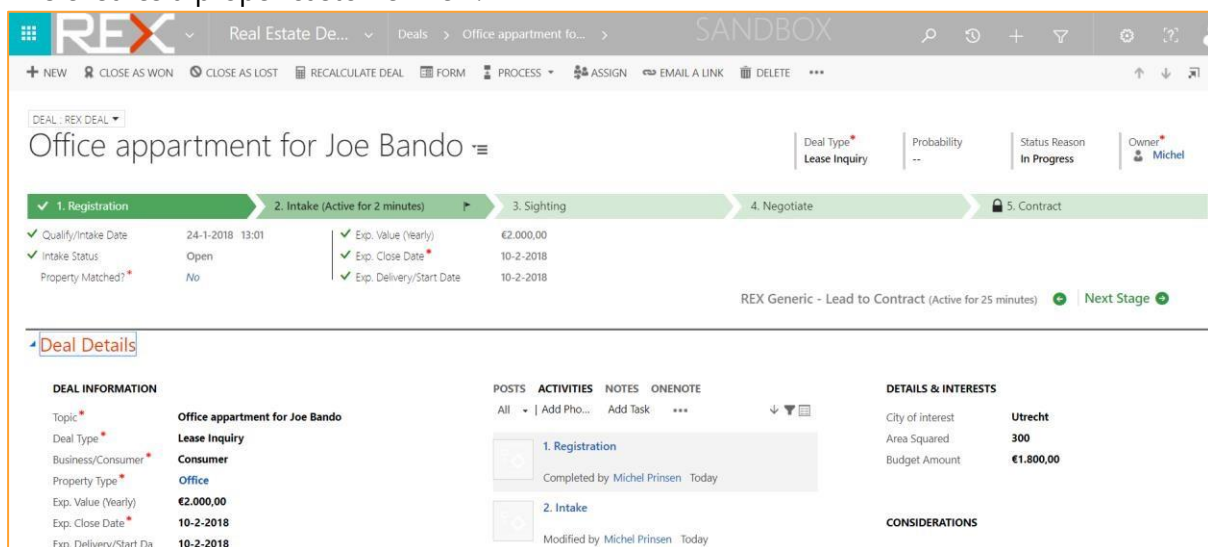
With button SAVE & CLOSE the match record is saved and the previous form will be shown again. When going from the Registration to the Intake stage a Deal needs to be created. This is done using button Qualify.

7.3 Deals

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

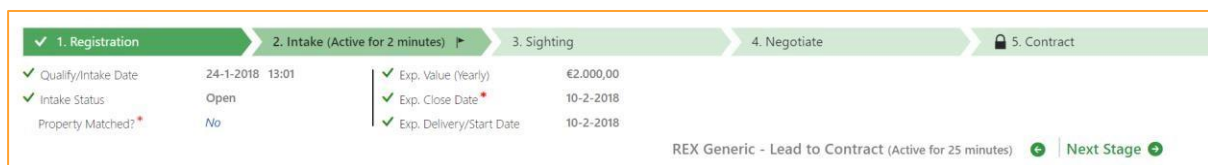


When a deal is created from a lead, all (related) information is also taken over to the Deal. This ensures a proper customer view.



The following phases are available in the Deal.

- Intake
- Sighting
- Negotiate



In the Intake phase more details 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 can 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.

Negotiate (Active for 4 days, 11 hours) ▶		Contract	
13-12-2017	✓ Terms Discussed	Yes	
€1.200,00	✓ Contract Type *	Sale	
€1.500,00	Create Contract *	No	
REX Generic - Lead to Contract (Active for 4 days, 11 hours)		◀	Next Stage ▶

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.



Business Process Error

Attribute 'rex_propertyid' cannot be NULL If you contact support, please provide the technical details.

[Show technical details](#)

Properties

RELATED PROPERTIES

Property	
Wilhelminatoren Office space 0.0.3	Interest
Wilhelminatoren Office space 0.0.2	Interest
Look Up More Records	
2 results + New	

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

4. Negotiate (Active for 3 minutes) ▶		5. Contract	
31-1-2018	✓ Terms Discussed	Yes	
€6.778,00	✓ Property Selected? *	Yes	
€565,00	✓ Create Contract *	Yes	
REX Generic - Lead to Contract (Active for 31 minutes)		◀	Next Stage ▶

CONTRACT : REX CONTRACT INFORMATION

Contract Joe Bando

Contract Term 1 Start: 1-2-2018 | Account: -- | Individual: Joe Bando | Owner: Michel

✓ 1. Registration → ✓ 2. Intake → ✓ 3. Sighting → ✓ 4. Negotiate → 5. Contract (Active for 1 minute)

Contract Type: [click to enter](#)
 ✓ Contract Term 1 Start Date: 1-2-2018
 ✓ Contract Term 1 End Date: 28-2-2018

✓ Contract Period 1: 1 Month
 ✓ Extension period: 1 Month
 ✓ Notice Date: 31-1-2018

Keys Transfer: No
 ✓ Notice Term: 1 month
 Deposit Status: [click to enter](#)

✓ Status Reason:
 ✓ Select Object:
 ✓ Select Unit:
 Concept: Bedrijfsruimte Zuid
 Unit 0.02

REX Generic - Lead to Contract (Active for 44 minutes) [Finish](#)

General

CONTRACT BASE DATA

Contract Number: --
 Contract Type: --
 Business / Consumer: Consumer
 Name/Reference: Contract Joe Bando
 Account: --

ACTIVITIES | **NOTES**

All | Add Photo... | Add Task... | ***

5. Contract
 Modified by Michel Prinsen Today

CONTRACT TERMS

Contract Term 1 Start Date: 1-2-2018
 Contract Term 1 End Date: 28-2-2018
 Contract Period 1: 1 Month
 Notice Term: 1 month
 Extension Period: 1 Month
 Notice Date: 31-1-2018

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.

Properties

RELATED PROPERTIES

Property: --

Name	REX Status	Object	Unit	First Sighting ...	First Sighting ...	Status Reason...	Status Reason...	Created On	Mod
Wilhelminatoren	Interest	Wilhelminatoren	Office space 0.0.2	6-12-2017 08:00	Planned	Investment Opti...	Available	4-12-2017 23:48	8-12-
Wilhelminatoren	Interest	Wilhelminatoren	Office space 0.0.3	6-12-2017 08:00	Planned	Investment Opti...	Available	8-12-2017 12:17	8-12-

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

MATCH : INFORMATION

Wilhelminatoren

General

Object: Wilhelminatoren
 Unit: Office space 0.0.2

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.

Properties

RELATED PROPERTIES

Property --

Name	REX Status	Object	Unit	First Sighting ...	First Sighting ...	Status Reason...	Status Reason...	Created On ↑	Modified On
Wilhelminatoren	Interest	Wilhelminatoren	Office space 0.0.2	6-12-2017 08:00	Planned	Investment Opti...	Available	4-12-2017 23:48	8-12-2017 1...
Wilhelminatoren	Interest	Wilhelminatoren	Office space 0.0.3	6-12-2017 08:00	Planned	Investment Opti...	Available	8-12-2017 12:17	8-12-2017 1...

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

MATCH : INFORMATION

Wilhelminatoren

SIGHTING

First Sighting Date **6-12-2017 08:00**

First Sighting Status **Planned**

Create New Visit **No**

+ [icon]

Subject	Activity Type	Start Date ↑	Owner	Regarding
---------	---------------	--------------	-------	-----------

No Visit records found.

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.

REX Sales Visits > New Visit SANDBO

SAVE ✓ MARK COMPLETE SAVE & CLOSE FORM EDITOR

VISIT : REX VISIT

New Visit

Reason for Meeting* Sighting Start Date -- Owner* Thijs Bakker

General

Subject*	REX Visit Report	Description
Owner*	Thijs Bakker	Activity Status* Open
Regarding	--	Description --
Reason for Meeting*	Sighting	
Account	--	
Attendees	--	
Own Staff	--	
Start Date	--	
Property	Amsterdam Object 1	

Follow-Up Activities

Tasks (Visit) Appointments (Visit)

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

SIGHTING

First Sighting Date **6-12-2017 08:00**

First Sighting Status **Planned**

Create New Visit **Yes**

Subject	Activity Type	Start Date ↑	Owner
REX Visit Report - Manually created	Visit	6-12-2017 08:00	Michel Prinsen
REX Visit - Joe Habita's	Visit	6-12-2017 08:00	Michel Prinsen

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

MARK COMPLETE DELETE CLOSE VISIT TO DEAL TO CASE ADD TO QUEUE QUEUE ITEM DETAILS ASSIGN SHARE

VISIT: REX VISIT

REX Visit - Joe Habita's

Reason for Meeting: Sighting Start Date: 6-12-2017 08:00 Owner: Michel

General

Subject: REX Visit - Joe Habita's
 Owner: Michel Prinsen
 Regarding: Interested in renting an office space in Amsterdam
 Reason for Meeting: Sighting
 Account: Joe Habita's
 Attendees: --
 Own Staff: --
 Start Date: 6-12-2017 08:00
 Property: Wilhelminatoren

Description

Activity Status: Open
 Description: Joe has interests in this object and unit.

Follow-Up Activities

Tasks (Visit)

Subject ↑	Regarding	Owner	Priority	Due Date
Call Joe	Interested L	Michel Prinsen	Normal	11-12-2017 11:

Appointments (Visit)

Subject ↑	Regarding	Required Attendees	Priority
No Appointment records found.			

Created By: Michel Prinsen Date Created: 8-12-2017 15:17 Modified By: Michel Prinsen Last Updated: 8-12-2017 15:19

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

SIGHTING

First Sighting Date **6-12-2017 08:00**

First Sighting Status **Planned**

Create New Visit **Yes**

Subject	Activity Type	Status Reason	Start Date ↑	Owner	Reg
REX Visit Report - Manually created	Visit	Concept	6-12-2017 08:00	Michel Prinsen	<input type="checkbox"/> In
REX Visit - Joe Habita's	Visit	Completed	6-12-2017 08:00	Michel Prinsen	<input type="checkbox"/> In

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.

