



Development • *the productive digital*

Microsoft Dynamics 365 for Real-Estate



Development



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1 INTRODUCTION

1.1 SOLUTION INTRODUCTION

At Link Development our Microsoft Dynamics 365, team has the required experience and we have done our research to understand exactly what each industry's needs are to be able to speak their language. As a result, we have developed CRM verticals for the industries that most demand a heavily customized CRM solution and constantly plan to expand to other industries that also require such solutions. Amongst our most demanded CRM verticals is the CRM real estate vertical which we are presenting in this scoping document. The solution has been heavily customized for the real estate industry; it has been designed to fit the needs of anyone working in the real estate industry, whether you are looking for a solution that targets brokers or capital markets, everyone using the system will experience the feeling of having a system that fits his exact needs.



Figure 1: Solution Overview

Considering the challenges that the real estate sector faces while providing its services to its broadband of customers, LINK Development has developed its real estate platform, based on Microsoft Dynamics CRM, to resolve them. Link Development's platform enables the real estate sector to manage its sales and provide its services with excellence through; better customer's profile visibility, streamlined automated services, sales processes automation, smart features enhancing employees' performance, availing various channels to communicate with customers and giving executives the insightful mechanism to manage performance. All besides giving the option for low cost implementations; through CRM Online.

2 SOLUTION DISCRIPTION

2.1 IN SCOPE

2.1.1 CUSTOMER PROFILES

The customer form provides a 360-dgree of customer information and the transactions related to him on the system.

- Personal Information
- Contact Information and contact method
- Customer's Interaction activities (Phone Calls, Emails).
- Notes and Attachments
- Related Deals, units included price, payment terms , sales representative, CRs, ...etc

2.1.2 BROKER PROFILES

- The system will provide the ability to add new brokers to the system and salesperson will have the ability to link them with unit sales.
- The broker form will contain the following:
 - Broker Name
 - Contact details
 - Company registration address
 - Contract status/signing date
 - Target market / geographical diversity
 - Broker commission percentage
 - List of sold units/link to generated leads
 - Notes/comments and attachments

2.1.3 SALES LETRATSURES

Sales Literature provides a place to store sales information/ Marketing collateral. It gives sales team users a place to store and access brochures, promotional materials, pricing structures and other related literature.

It also provides an easy way to send leads and contacts information right from within the system.

2.1.4 REAL ESTATE PROJECTS CONFIGURATION

This module is concerned with **Projects, Building** and **Units'** management.

2.1.4.1 PROJECTS

Definition of project data as per the below sample:

- Project Name
- Release Year
- All related Buildings/Units/Deals

2.1.4.2 UNITS

The users will be able to view units' info and add new units if needed.

Here are unit information sample:

- Unit number
- Price
- Type
- No of Bedrooms
- Floor
- No of Bathrooms
- Yard sqm
- Internal area sqm
- Terrace sqm
- Plot sqm

2.1.4.3 PAYMENT TERMS

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Payment terms will be defined on the system per project. Below is the configuration for the payment terms: **Example**

Category	Payment Term	Description	Percentage
Main Price	Reservation	Amount to be paid in order to preserve the unit	2.5%
	Down Payment	Amount to be paid to activate the sale	12.5%
	Delivery	Amount to be paid at the unit delivery date	10%
	Instalments	Monthly, quarterly, semi-annually or annually payments	75%
Other Factors	Maintenance	Additional maintenance fees	10%

- The values above can be configured by the operations/ admin.

2.1.5 LEAD MANAGEMENT

Lead Cycle Management covers the following:

- Lead Information (Name, Nationality, phone, email .. etc)
- Sales representative activities (emails, phone calls, meetings).
- Considering different channels and projects. (lead source/Source category, interested in which project)
- Lead Follow-up date.
- Lead assigning; system allows the authorized person to assign lead to different sales person.

- Qualify Lead: Sales can Qualify (convert) the lead to the customer list by clicking the qualify button or disqualify in case of lost leads.

This is in addition to system views of the real estate solution that enables the user to browse the list of leads using different pre-defined views such as:

- Open leads
- My Open Leads
- Closed leads (qualified and turned into a customer or disqualified)
- Leads opened this week
- Leads opened last week

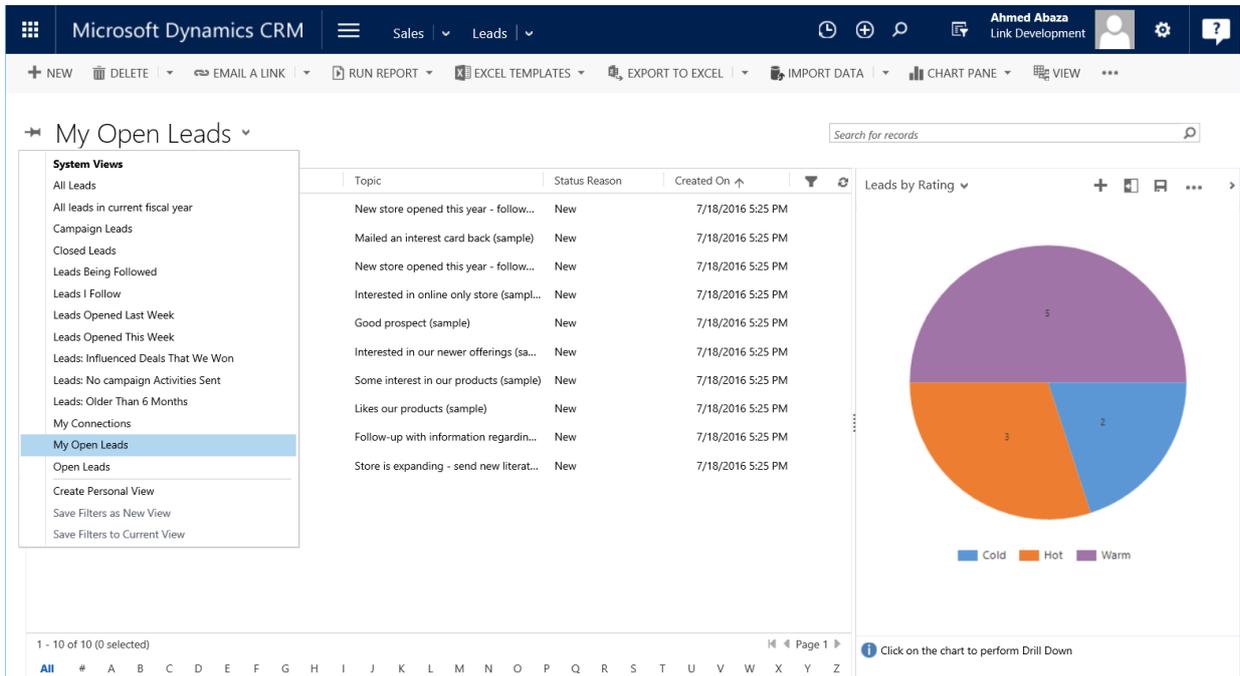


Figure 2: Sample Leads View/List

2.1.6 SALES MANAGEMENT

2.1.6.1 SALES CYCLE

'Sale' form is the initial agreement that tracks all the sales details between the Customer and Customer per unit.

1. CRM will also show a default view for all sales team with all vacant units where "Unit Status" = "Available" for customers to choose from. The view shall be sortable and searchable
 - Salesperson can create a custom view for himself by defining custom criteria to view a subset of the available units.
2. Customer chooses an available unit and agree on the payment terms.

- Salesperson will create a Sale by filling the Sale form and CRM automatically marks "Deal Status" as "Draft". Which means that the sale form is ready waiting for the customer to make the reservation payment and this sale will not consider yet and the unit still available.

2.1.6.2 UNIT BLOCKING

Unit blocking is an option to let Customer can block the sales from selling a specific units. And that could be for different

- Unit blocking just for 'Available' units.
- Customers authorized person will have the option to directly block a unit.

2.1.6.3 TERMINATION PROCESS

System will allow Unit termination after "selling.

Accordingly, authorized person for example "Sales Admin" or "operation" can follow up the termination process and steps undertaken to complete the termination.

Unit transfer (upgrade or downgrade) will be handled through termination and create a new sale, and this will be handled manually by authorized person.

2.1.7 VISUAL MAP SOLUTION DESCRIPTION

The proposed solution will provide a map image that displays different Buildings and their states.

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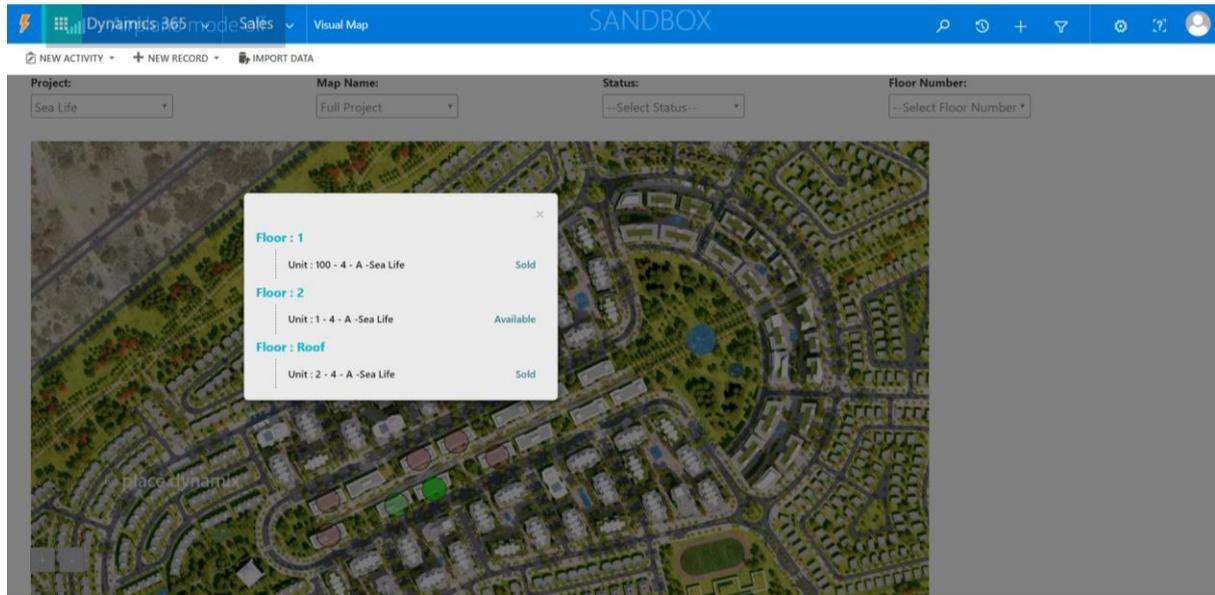
The Visual Map solution will provide a image that displays different Buildings and their states. as a configuration; image will be uploaded by Customer and add the buildings location and it will automatically availability.

Customers can view the Visual Map and chose a project so that the project image will appear with buildings pinned in color coding manners. Therefore, that will easily let LD to differentiate between sold / available units using color-coding.

Visual Map part of the system so that it's updated by sold/vacant units automatically

Visual map configuration by authorized person:

- Upload the project image
- Pin each building at its place over the image.
- Color configuration: as Customers can add it's owe color coding for sold/ vacant units.



Visual Map Features:

- Unit's availability.
- Color code Pins.
- Filter units by Availability /Floor
- Unit form URL redirecting.
- Configuration for new projects

2.1.8 ACTIVITY MANAGEMENT

- Track and capture the details of interactions activities between staff and customers including emails, phone calls, fax, letters, and appointments.
- Manage activities related to customers, leads and any other related entity.
- Manage completed and planned activities associated with other Dynamics CRM entities.
- Out of the box integration and synchronizing activities with users' mail accounts.
- Customize views related to Activity Management as per Customer business needs.

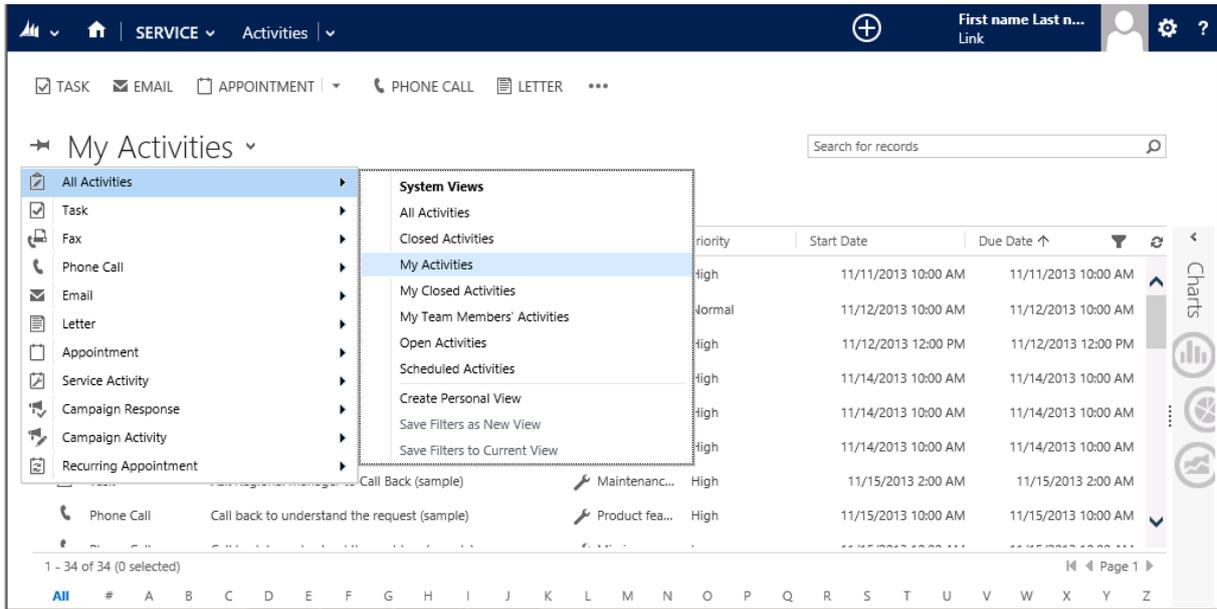


Figure 3: Sample Activities View/List

2.1.9 REPORTS

- Implementing a total of 5 CRM reports.