Property-xRM Sales

User Manual

Property-xRM
The Complete Real Estate Suite

Metadata Confidential

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Property-xRM powered by Dynamics 365

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1. Introduction to Property-xRM Sales Module

Property-xRM powered by Microsoft Dynamics 365 provides the capability to track and manage end to end sale process of a Property in addition to the existing Sales, Marketing and Service features of Dynamics 365.

Some of the features included in the Sales Module are as follows:

- Manage Projects, Property and Units data
- Create and Track Leads or Enquiries
- Manage Companies and Contacts
- Capture Customer Preferences
- Shortlist Units based on the Preferences Captured
- Create and Maintain Flexible Payment Plans
- Prepare and Manage Offers/ Bookings
- Print Offer/ Booking form of various languages
- Convert the Booking into a Unit Sale

Note:- There are other extended capabilities of Property-xRM Sales module such as Sales App, Customer Portal, Advanced Marketing Automation, integration with ERP solutions etc. which makes Property-xRM a complete suite for managing the real estate business processes. Please contact sales@metadatacorp.com to understand the full feature list.

2. Managing Customer Relationship for Real Estate Industry

2.1 Managing Property Definition Module

Project, Property and Unit are the master records in Property-xRM Solution and has the following structure;

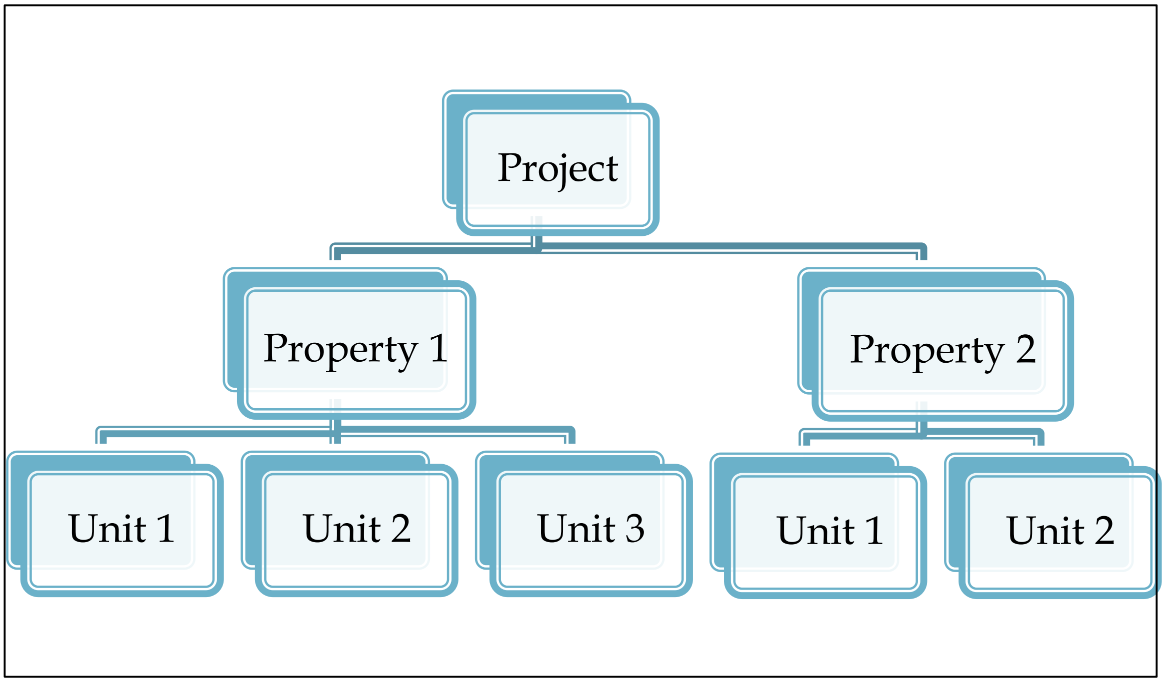


Figure 1: Property Definition Structure

As per above figure, Project is considered as top of the hierarchy, under which multiple properties can be defined. In turn, each Property can be associated with multiple Units under it.

2.1.1 Work with Projects

Project represents a collection of Properties/ Community/ Clusters/ Phases.

2.1.1.1 Create a Project

a. In the Navigation pane, navigate to Master Data Management under Sales and then to Project.
b. In the Actions toolbar, click on 'New' to create a New Project.
c. In the General section, enter the information as needed:
    - Name

- Developer
- Category
- Stage
- License No.
- Address

Once the details of the project have been entered, click on save and the CRM saves the project and creates a unique ID.

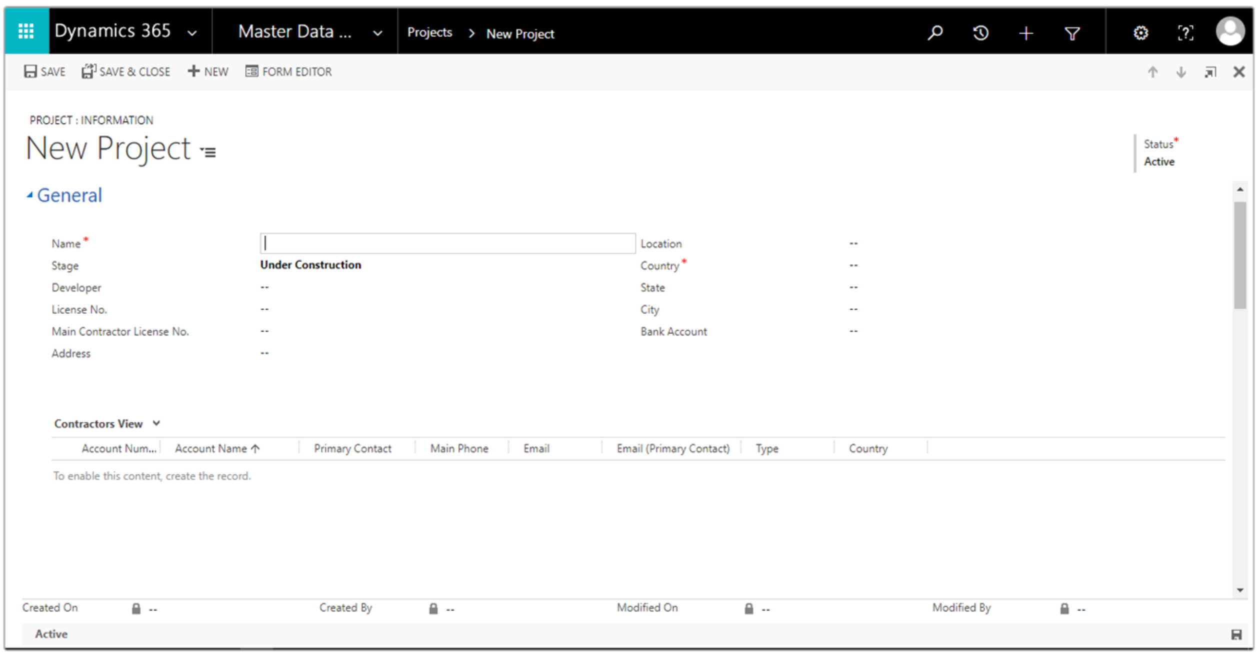


Figure 2: New Project Form

There are additional sections present on the form in which more information related to a project can be captured such as:

- Footage - Area fields such as Built Up Area, Land Area, etc.
- Amenities
- Properties
- Expenditure details
- Completion Dates – Record the start and end date of the project

Please note: The fields provided in the form can be changed based on the need.

2.1.1.2 Edit a Project

a. In the Navigation pane, navigate to Master Data Management under Sales and then to Project
b. Open the Project and change the information you want.

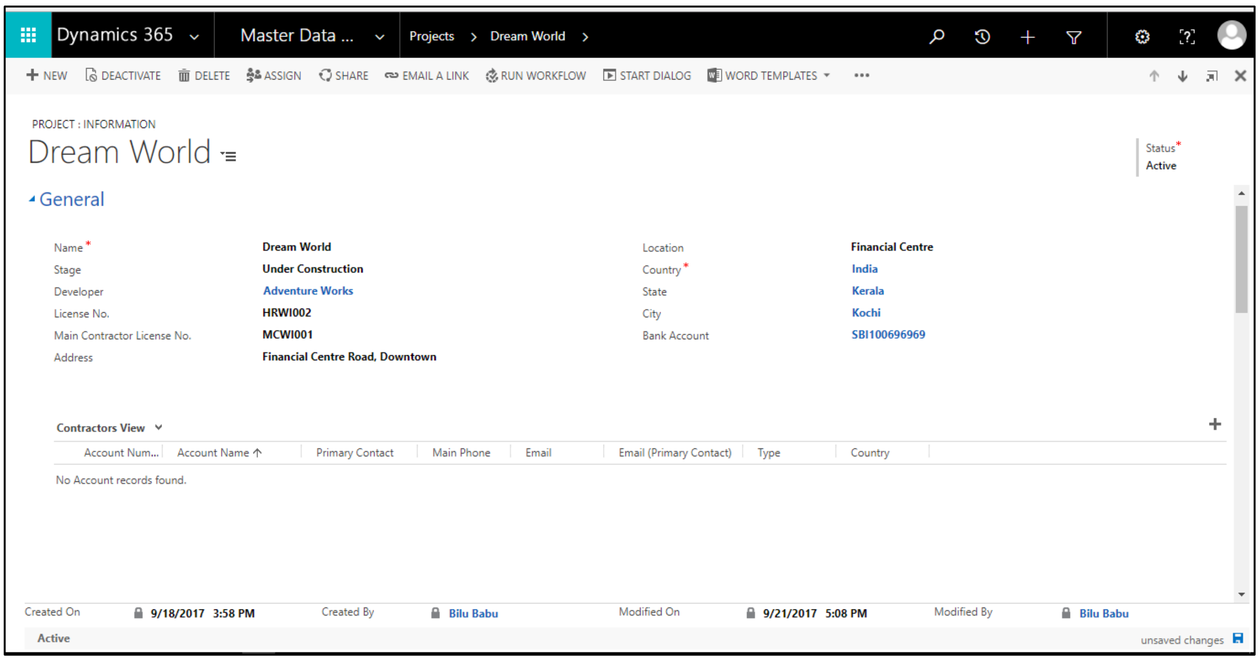


Figure 3: Project Form

2.1.2 Work with Properties

A project can have multiple properties associated with a Property. Properties typically represent buildings that are there within a project.

2.1.2.1 Create a Property

The Properties of the Project can be created from a project or directly from the Master Data Management under Sales in the navigation.

a. Open an existing project and navigate to the Properties grid present on the project form.
b. Click on the ‘+’ button to create a new Property.

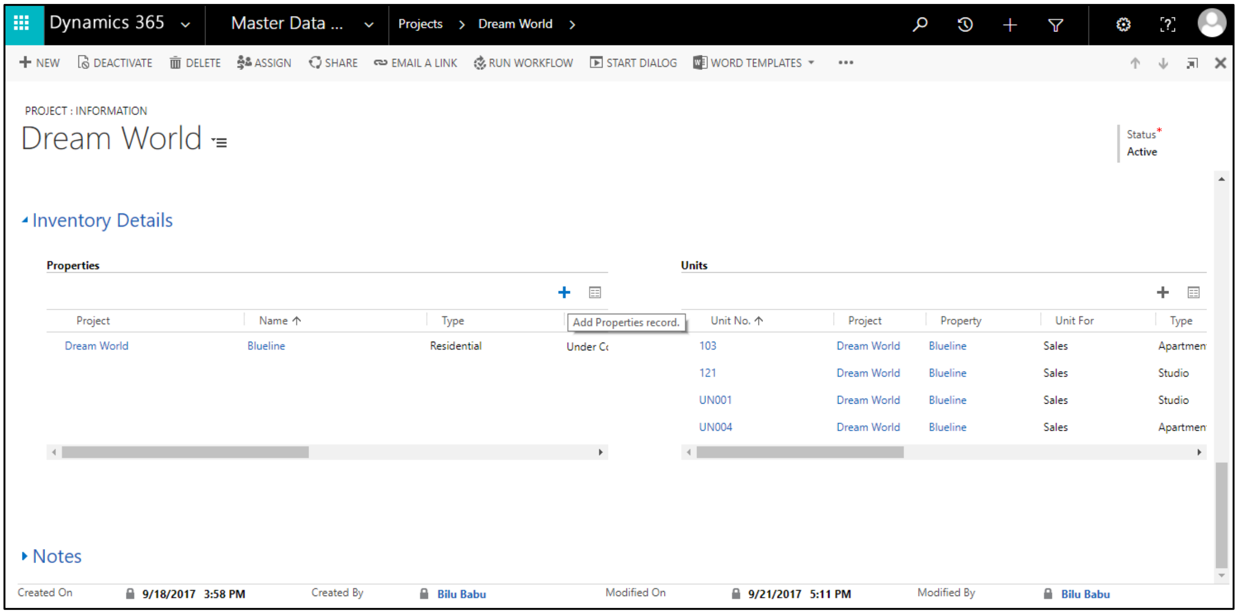


Figure 4: Properties grid on Project Form

c. In the General section, enter the information as needed:

- Name
- Type
- Project - The corresponding project will be mapped automatically
- Developer
- Stage
- Floors
- Built Up Area (Sq. Ft.)

Once the details of the property have been entered, click on ‘Save’ and the CRM saves the property by creating a unique property id.

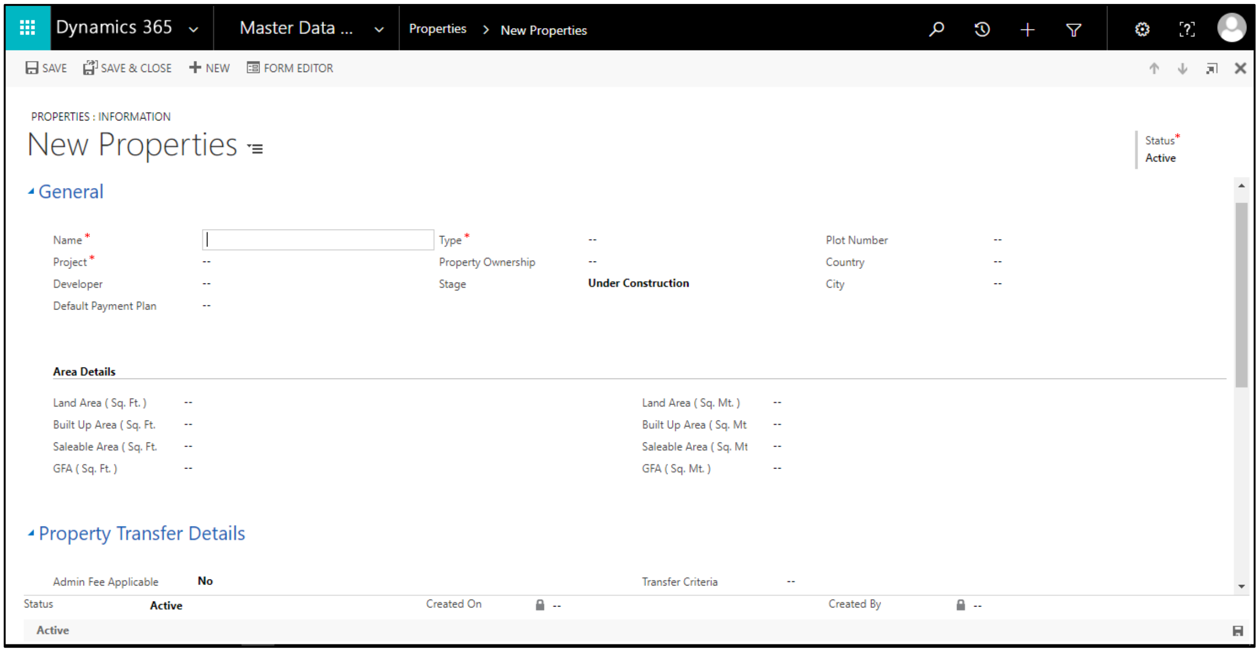


Figure 5: New Property Form

There are additional sections present on the form in which more information related to a property can be captured such as:

- Cost Details
- Units – Record all the units that are under that property

Please note: The fields provided in the form can be changed based on the need.

2.1.2.2 Edit a Property

a. In the Navigation Pane, navigate to Master Data Management under Sales and then to Properties.
b. Open the Property and change the information you want.

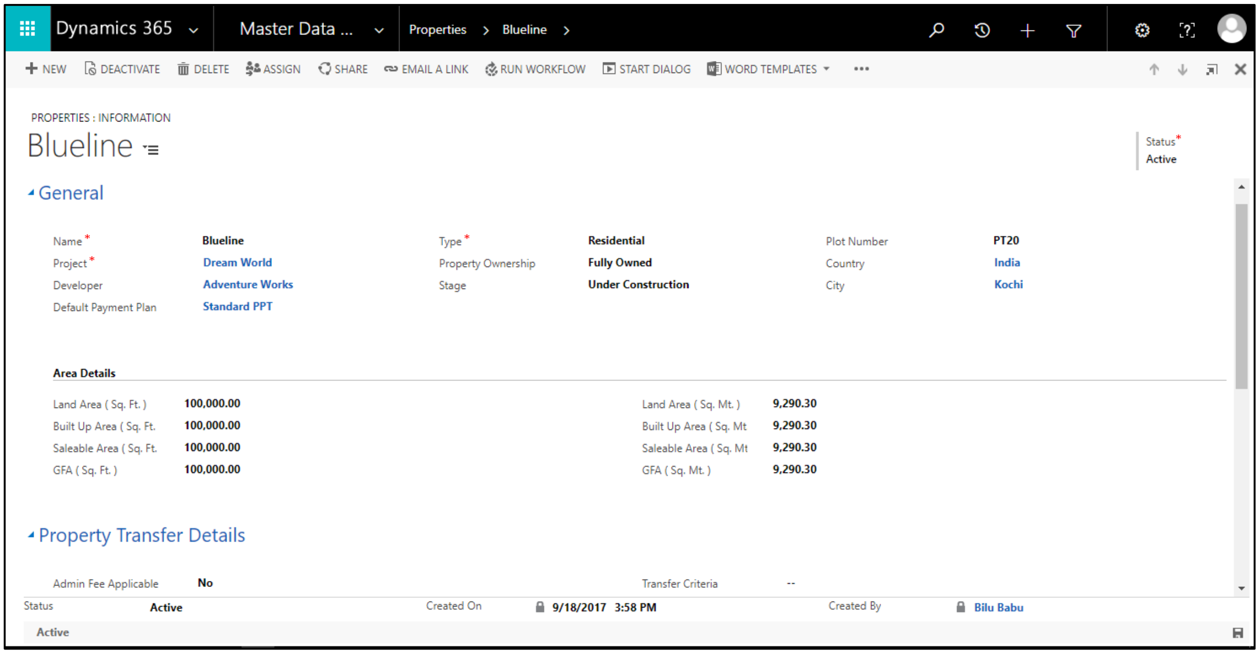


Figure 6: Property Form

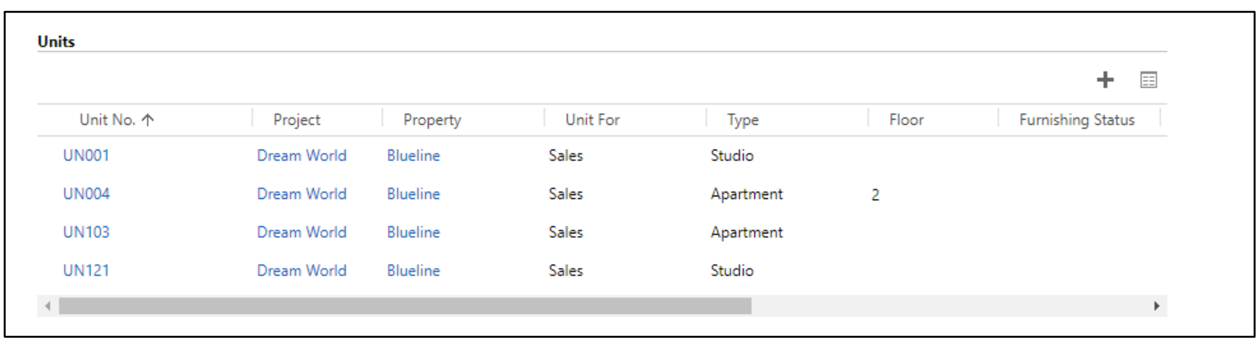
2.1.3 Work with Units

A unit is an individual part of a project/ property that can be sold. Typically units can range from apartments, villas, to commercial spaces.

2.1.3.1 Create a Unit

The Units of the Property that are used for the sales process can be created from the property or directly from the Master Data Management under Sales in the navigation.

a. Open and existing property and navigate to the unit grid present on the property form.
b. Click on the '+' button to create a new unit under that property.



Units

Unit No. ↑	Project	Property	Unit For	Type	Floor	Furnishing Status
UN001	Dream World	Blueline	Sales	Studio		
UN004	Dream World	Blueline	Sales	Apartment	2	
UN103	Dream World	Blueline	Sales	Apartment		
UN121	Dream World	Blueline	Sales	Studio		

Figure 7: Units grid on Property Form

c. The corresponding property will be mapped to the unit form. In the General section, capture the information as needed:

- Unit No.
- Unit For - Sales
- Type
- View
- Floor
- Bedrooms
- Balconies

Once the details of the unit have been entered, click ‘Save’ and the CRM saves the unit by creating a unique unit id.

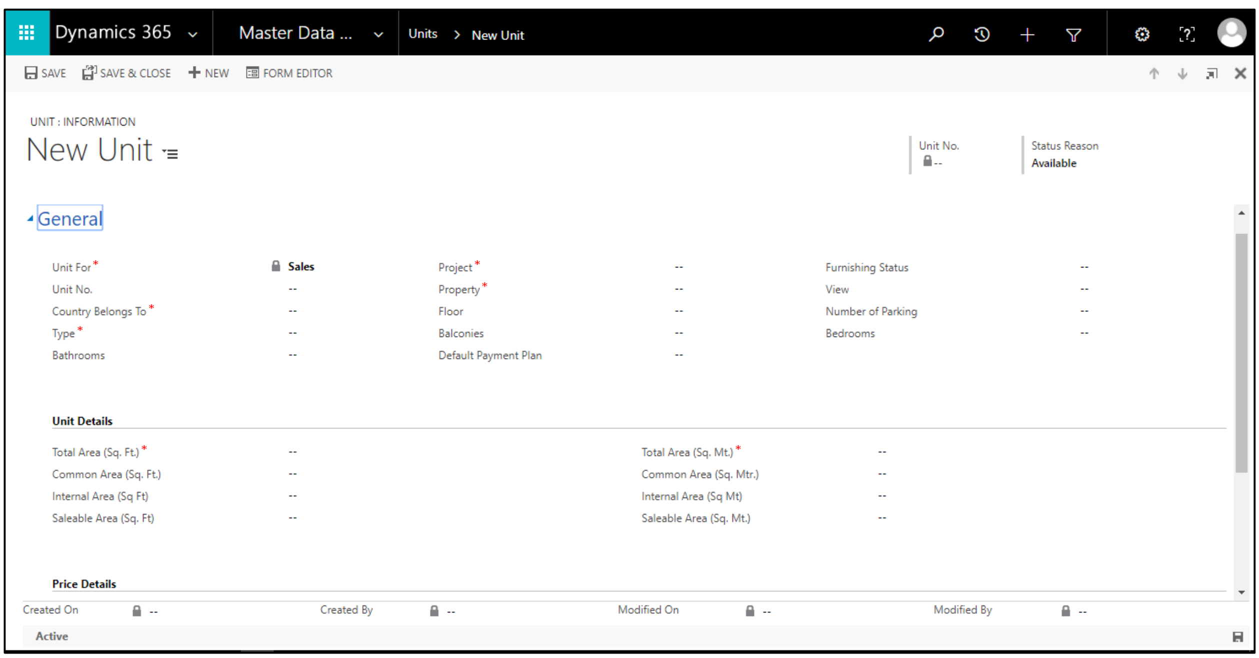


Figure 8: New Unit Form

There are additional sections present on the form in which more information related to a unit can be captured such as:

- Sale Price – Price of the unit such as Price (Sq. Ft.), List Price, Admin Fee, Special Price etc.

<u>Please note</u>: The fields provided in the form can be changed based on the need.

2.1.3.2 Edit a Unit

a. In the Navigation Pane, navigate to Sales and then to Units.
b. Open the Unit and change the information you want.

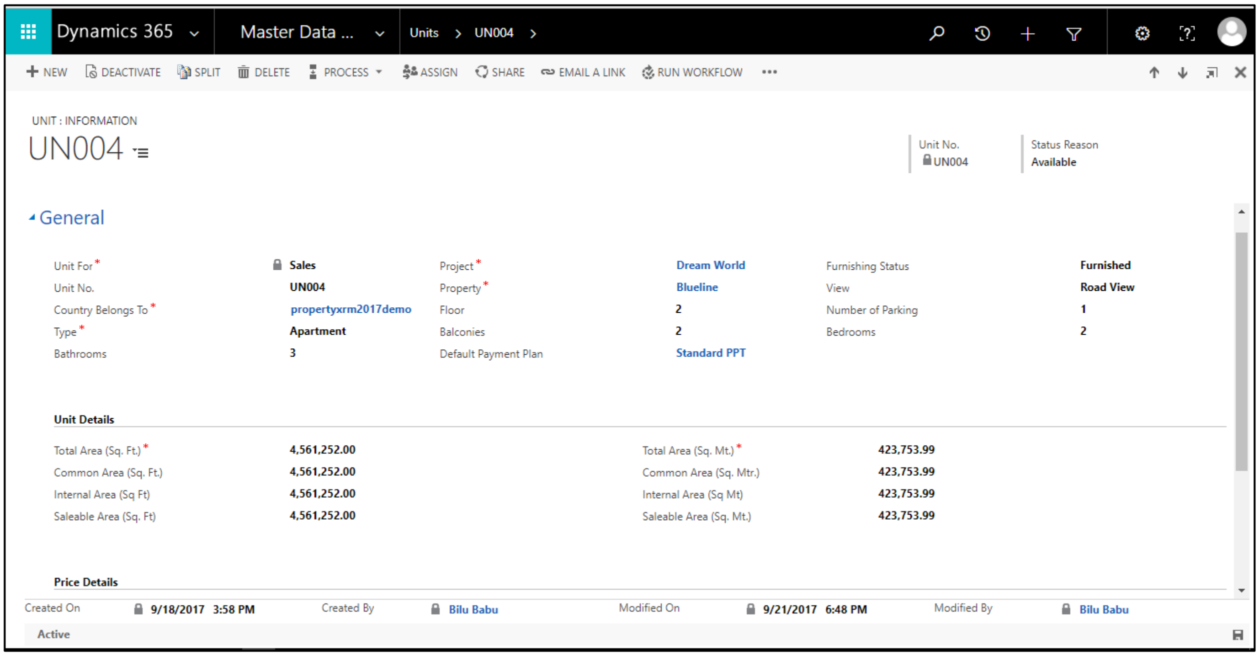


Figure 9: Unit Form

2.2 Managing Leads

Capture leads manually or automatically (through website) with the help of lead management module. Capture basic information of a person along with their preferences. In addition to this, nurture your leads by scheduling activities (phone calls, appointments, tasks, emails, etc.) and including them as a part of various email campaigns.

In Property-xRM, you can get lead information in the Sales area. Your organization might refer to leads as enquiries, prospects, or sales opportunities. All activities are logged and a running history of every activity with the lead is kept, even once it is completed.

You can enter leads individually. In addition to this, you can use Property-xRM to import lead lists into the database, perform the common qualifying activities, and convert leads to opportunities, if they qualify.

Importing leads is the quickest way to add them to Property-xRM. You might already have prospects in Microsoft Office Excel that you can import using the Import Data Wizard.

Each disqualified lead is retained in the database for business-reporting purposes.

You can track information about prospective customers, and then assign and qualify leads. Because leads are tracked separately from customers throughout the sales cycle, you can focus on building your customer base.

2.2.1 Work with Leads

Leads represent potential customers who have not yet been qualified for your sales process. As you qualify leads, you can convert them to other types of records.

Create or edit a lead

This task requires permissions that are found in all default security roles.

2.2.1.1 Create a Lead

When you create a lead, you might be tempted to only enter the system-required fields (marked with asterisks; Business-required symbol) or business-recommended fields (marked with plus signs; Business-recommended symbol). However, the more data you collect and enter into this form, the more likely you are to turn those leads into business opportunities. Remember that e-mail addresses, the source of the lead and specific unit preferences are key factors in helping your sales staff complete the necessary follow-up.

a. In the Navigation Pane, click Sales, and then click Leads.
b. In the Actions toolbar, click New, or open the record that you want to edit.
c. In the General section, enter the information as needed:
   - Title
   - First Name
   - Last Name
   - Company
   - Email
   - County of Residence
   - Mobile Phone
   - Lead Source
   - Lead Channel
   - Mailing Address

Once the basic details of the lead have been entered, click on ‘Save’ and the CRM saves the lead by creating a unique ‘ID’.

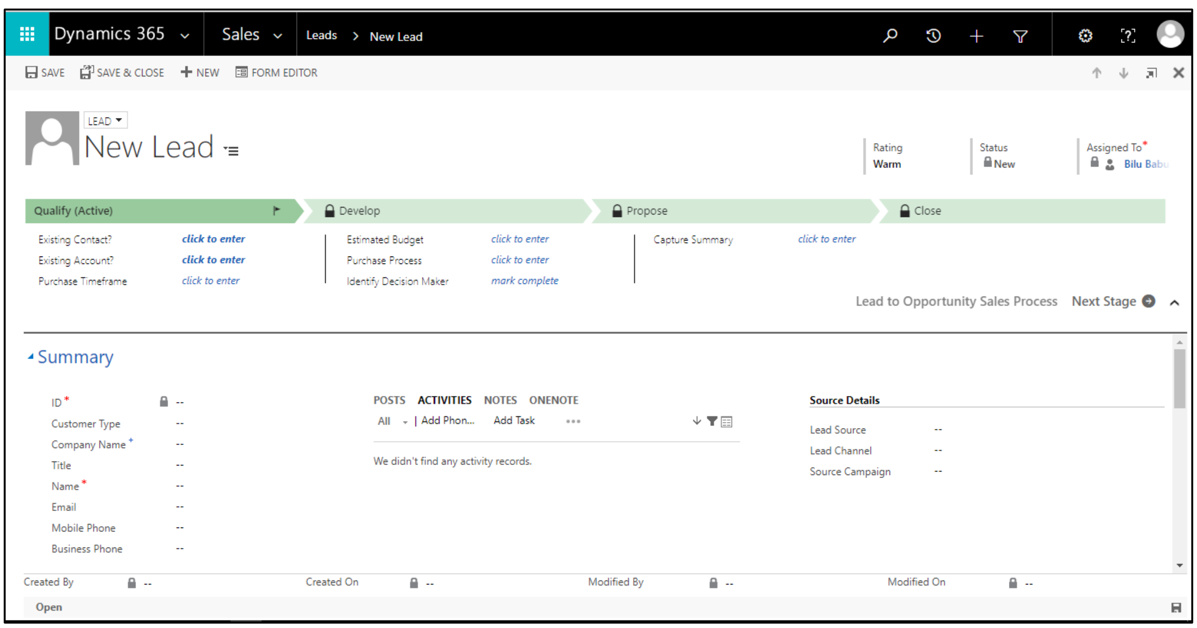


Figure 10: New Lead Form

There are additional sections present on the form in which more information related to a lead can be captured such as:

- Notes & Activities – Record various activities such as Phone Call, Email, Appointments, etc.
- Contact Preference – Preference of the contact such as Project, Property, Type of Unit, Budget, etc.
- Other Details – Nationality, Gender, etc.

<u>Please note</u>: The fields provided in the form can be changed based on the need.

2.2.1.2 Edit a Lead

a. In the Navigation Pane, navigate to Sales and then to Leads.
b. Open the Lead and change the information you want.

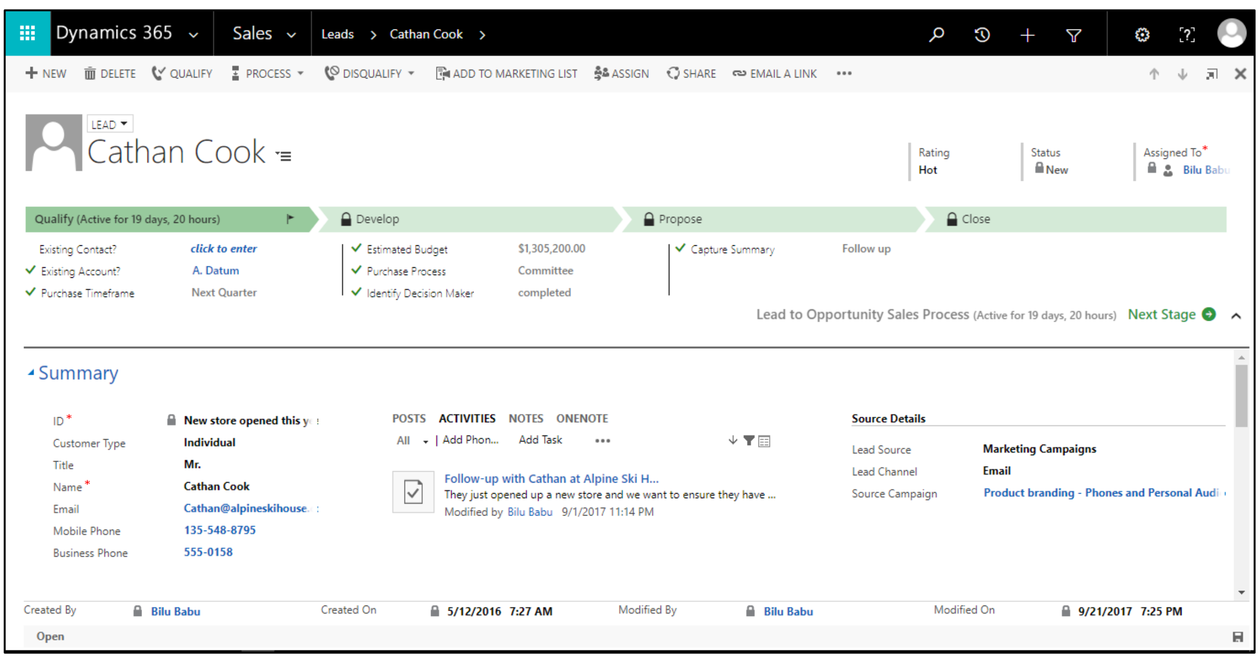


Figure 11: Lead Form

2.3 Managing Accounts and Contacts

In Property-xRM, you can manage, share, and collaborate on account (corporate customer) and contacts (individual customer) within your organization. The logging and tracking features benefit the person who makes the sale, his or her sales team, other supporting teams, and their management. All activities, such as e-mail, phone calls and meetings, are logged and a running history of every activity with the company or contact is kept.

You can enter accounts or contacts individually or you can use Property-xRM to import lists of these records into the database. You might already have customer records in Microsoft Office Excel that you can import using the Import Data Wizard.

2.3.1 Deciding between Using Account and Contacts

Accounts are organizations that you do business with, whereas contacts represent individual customers or specific representatives for an Account. Therefore, if you have mostly businesses that you sell to, then you will primarily create company records. However, if you sell to individuals, then you will want to create contact records.

Even if you only sell to individuals, you might still find Accounts useful for tracking your Brokers, Competitors or Vendors. You can have one or more contacts associated with a single Account, but only one of the contacts can be designated as the primary contact. You can create and edit Accounts or contacts from the Workplace, Sales, Marketing, and Services areas.

2.3.2 Work with Accounts

Accounts represent an organization that you may do business with.

Create or edit an Account.

This task requires permissions that are found in security roles.

2.3.2.1 Create an Account.

a. In the Navigation Pane, click Sales, and then click Account.
b. On the Actions toolbar, click New.
c. On the General tab, enter information as needed:
    - Account Name
    - Account Type
    - Primary Contact
    - Phone Number
    - Website
    - Communication Address

- ZIP Code
- Industry
- Originating Lead
- Contact Methods Preferred – Email, Bulk Email, Phone

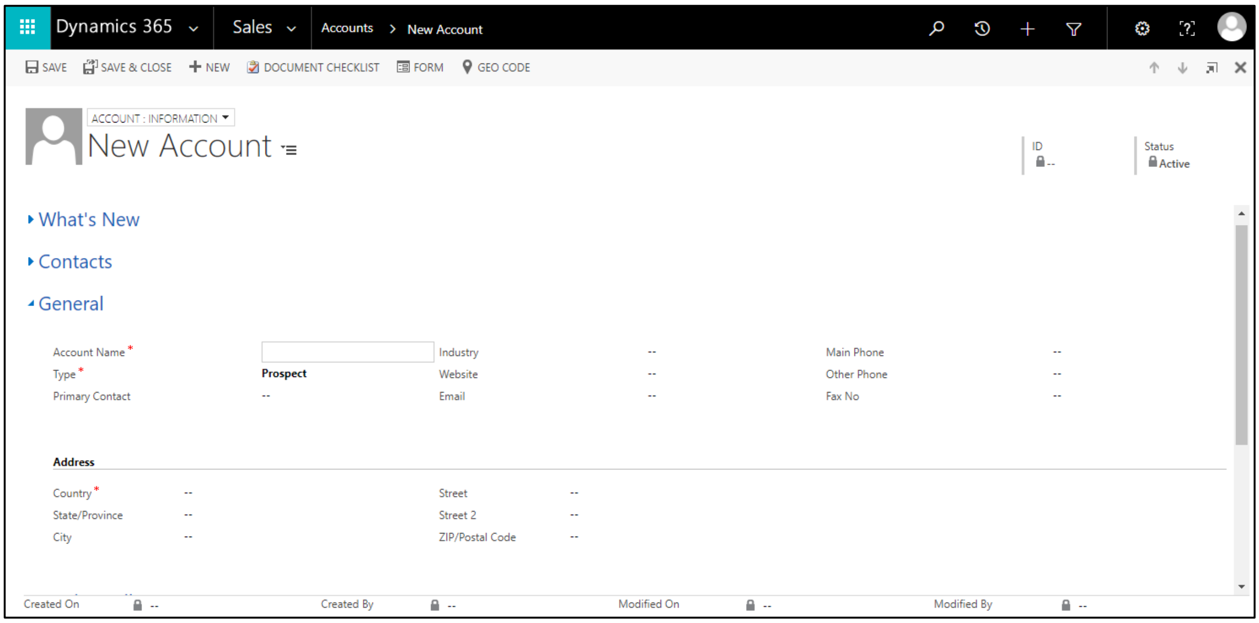


Figure 12: New Company Form

Please Note: The fields in the Account form can be configured to have business relevant fields.

2.3.2.2 Edit an Account

a. In the Navigation Pane, navigate to Sales and then to Account.
b. Open the Account and change the information you want.

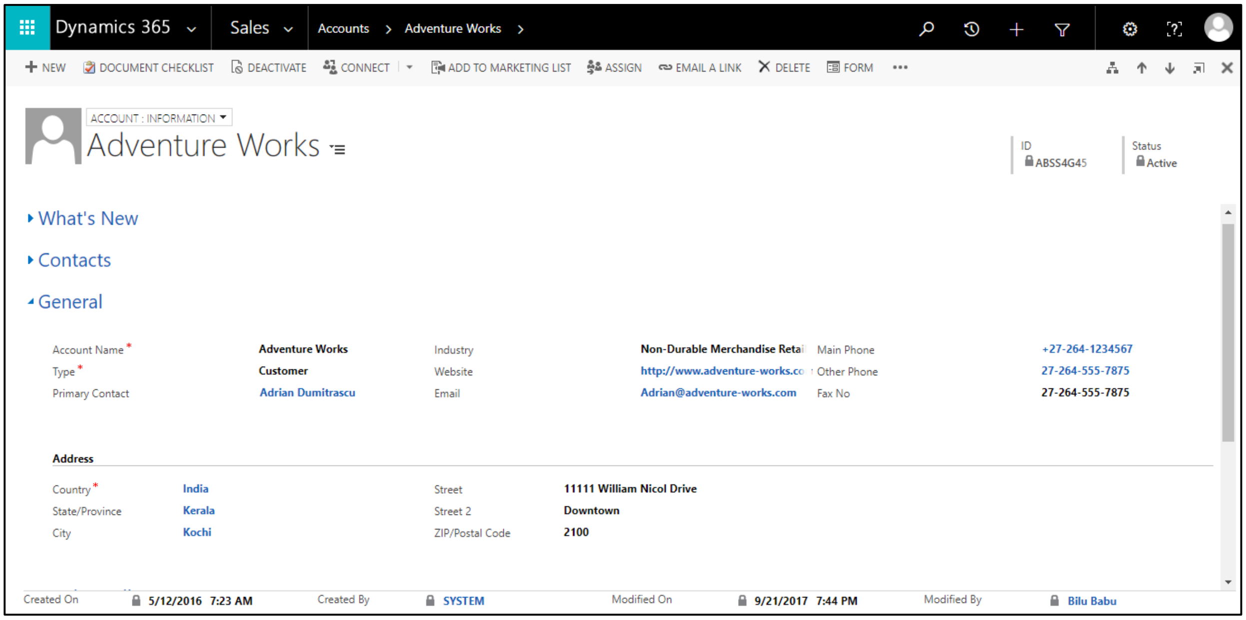


Figure 13: Account Form

2.3.3 Work with Contacts

Contacts are people who represent customers or potential customers, or someone related to a Account.

Create or edit a contact

This task requires permissions that are found in security roles.

2.3.3.1 Create a Contact

a. In the Navigation Pane, click Sales, and then click Contacts.
b. On the Actions toolbar, click New, or open the record that you want to edit.
c. On the General tab, enter information as needed:
   - First Name
   - Last Name
   - Parent Customer
   - E-mail
   - ZIP/Postal Code

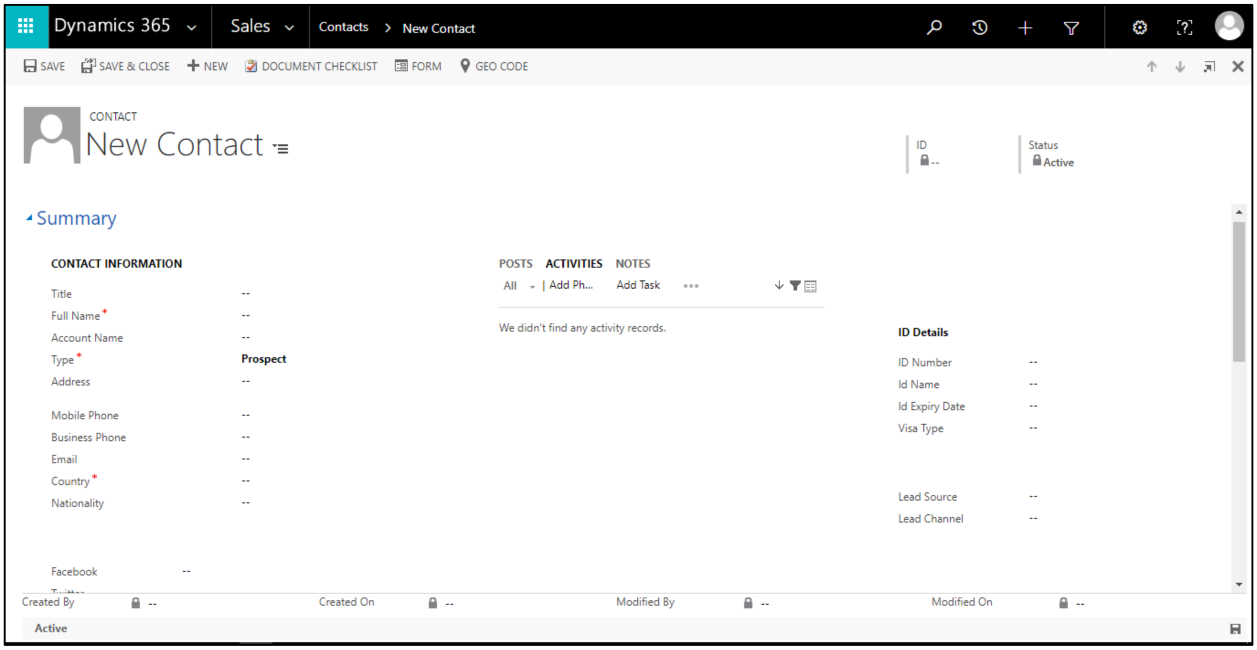


Figure 14: New Contact Form

d. On the Details tab, enter all the information you have available.
e. On the Notes tab, click here to enter a new note, and add the information that applies to your record.
f. Click Save or Save and Close.

<u>Please Note:</u> The fields in the Account form can be configured to have business relevant fields.

2.3.3.2 Edit a Contact

a. In the Navigation Pane, navigate to Sales and then to Account.
b. Open the Account and change the information you want.

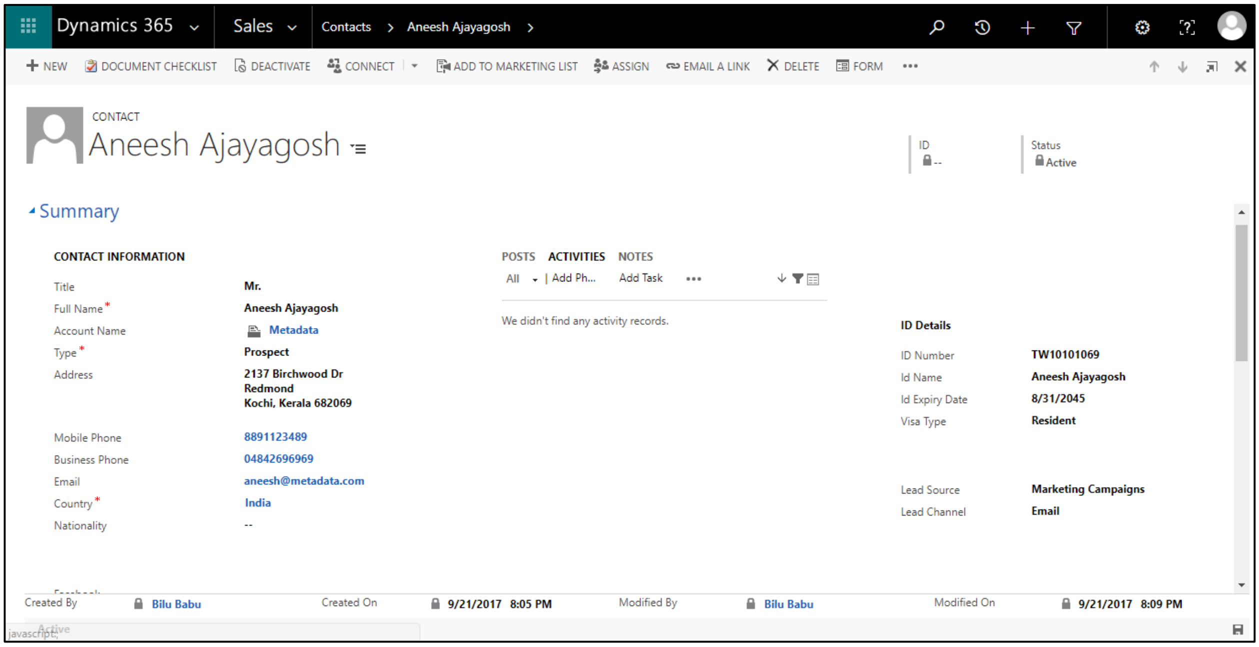


Figure 15: Contact Form

2.4 Managing Opportunities

An opportunity is a potential sale, which is similar to a lead. However, the subtle difference is that with an opportunity you can forecast sales revenue and factor in the probability for the sale to occur. When you create an opportunity, you must specify an existing account or contact record.

Using opportunities in your business process enables you to run pipeline reports to view how many sales have been closed and how many are in progress.

You can create a new opportunity that did not originate from a lead, or you can convert qualified leads to opportunities without re-entering the data, and then you can track opportunities through the sales cycle.

When you convert a qualifying lead into an account, contact or opportunity, you can access the lead record, which includes activities and notes, from the corresponding opportunity form. You cannot convert an opportunity to a lead; you can only close opportunities.

2.4.1 Work With Opportunities

Opportunities represent a potential sale to an account or a contact.

Create or edit an opportunity

This task requires permissions that are found in all default security roles.

Once the user has done various activities with the lead, it can either be qualified or disqualified.

d. On the lead form, go to the top ribbon which will have a qualify button.
e. Click on the 'Qualify' or 'Disqualify' button if the user wants to qualify or dis-qualify the lead.

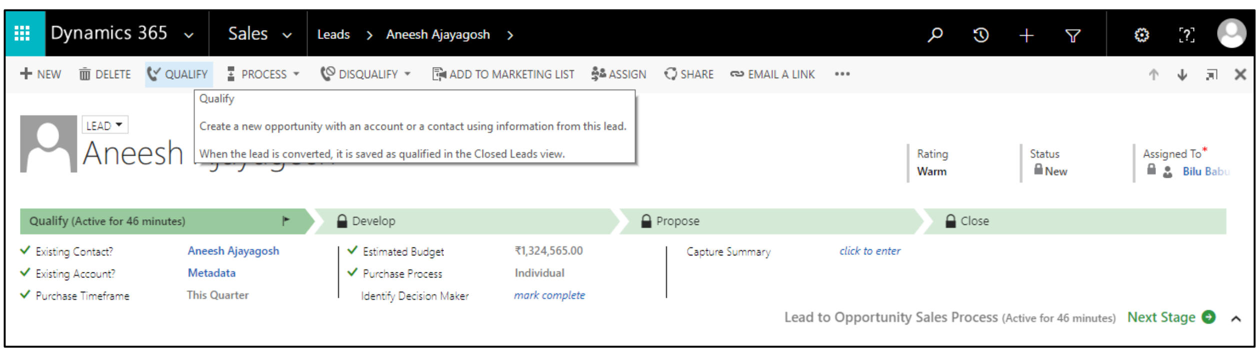


Figure 16: Leads Form Ribbon

f. Once the 'Qualify' button is clicked, the lead gets converted into an Opportunity, Contact and Account (if applicable), that is, the system creates new Opportunity, Contact and Account records.
g. If you want to disqualify the lead select the 'Disqualify' option in the actions toolbar and select a reason for disqualifying the lead.

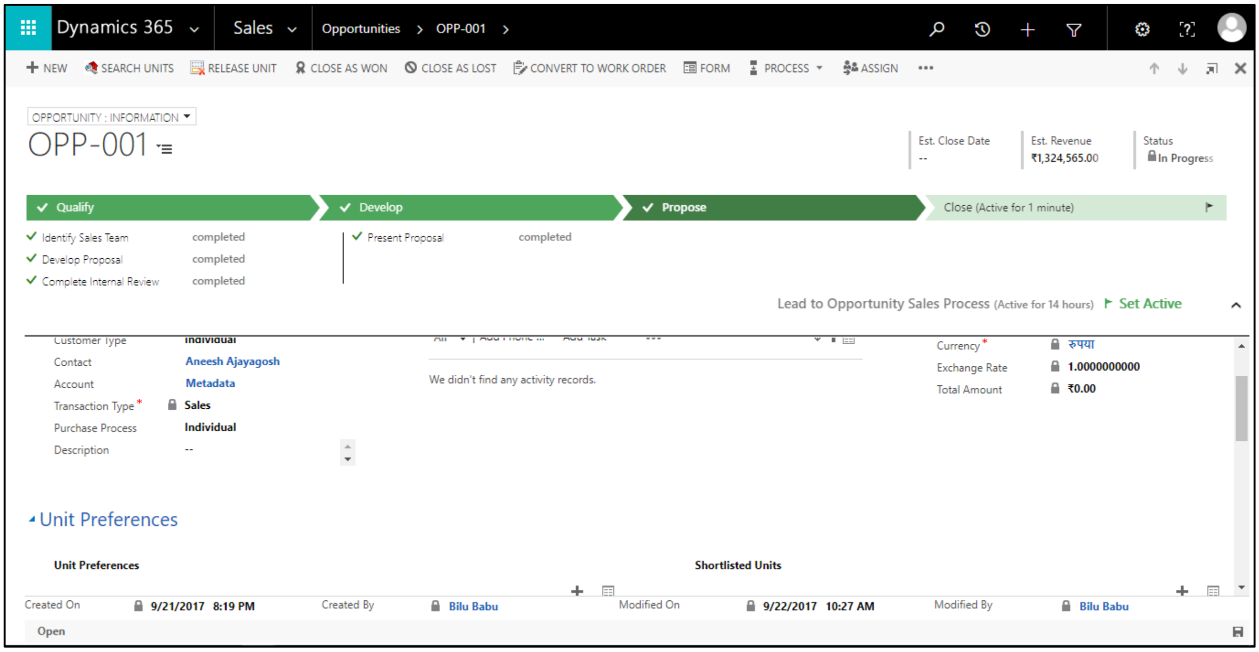


Figure 17: Opportunity Form

Please note: The fields provided in the form can be changed based on the need.

2.5 Managing Unit Preferences

Capture various preferences of prospects such as type of unit, location, view etc. for sales requirements. Capture these preferences either from the Lead or Opportunity.

a. Navigate to the 'Unit Preferences' grid on the lead form or the 'Unit Preferences' grid on the opportunity form.
b. Click on the '+' button in the gird. Then click on 'New' after clicking on the lookup button.
c. This will open a new Unit Preferences form. Enter information related to the prospects preference.

The various details captured under the preference section of the lead/ opportunity are as follows:

- Unit Type: Apartment, Villa, Studio, Duplex, Office, Retail, etc.
- Project: Any specific project the prospect is looking to purchase
- Property: Any specific property within the project

- Type: Sales
- Floor: Any specific floor preference
- Bedroom: Number of Bedrooms
- View: Any specific view such as pool view, lake view, city view etc.
- Budget Detail: Minimum Budget & Maximum Budget

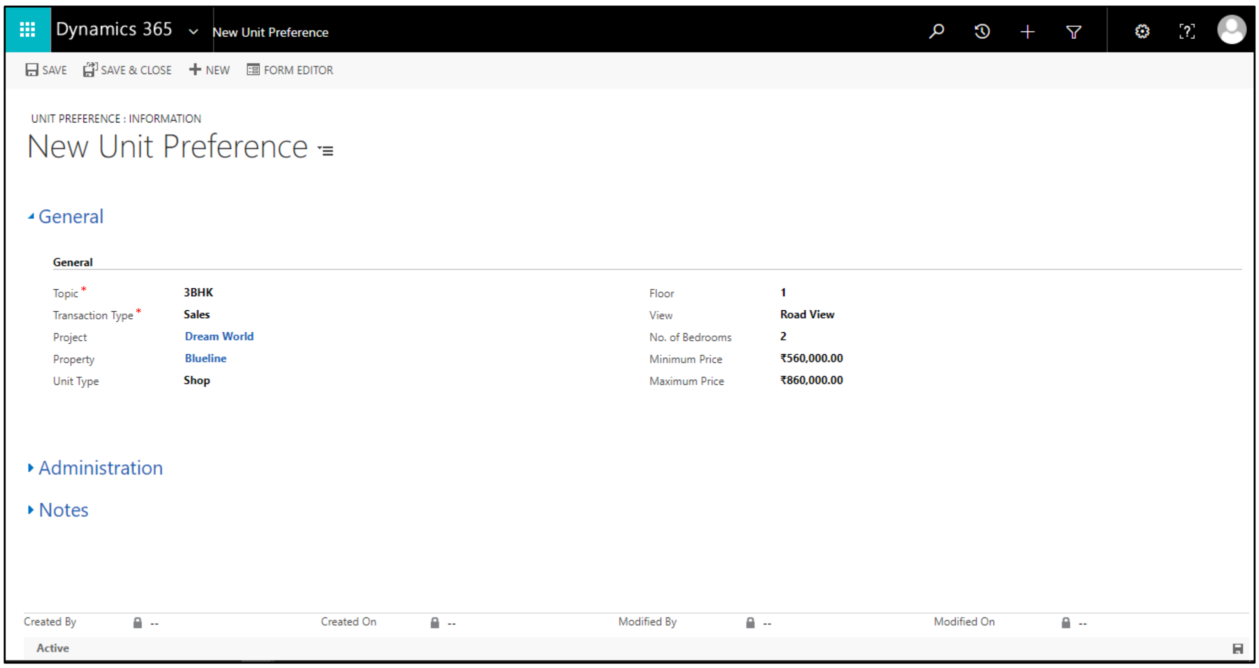


Figure 18: Unit Preference Form

Please note: The preferences can be changes based on the need of the customer so that the sales person can identify and act on what the prospect's exact need is.

2.6 Managing Shortlisted Units

It is all the more important to understand if there are units available within your project that can match your prospects preferences. Property-xRM provides you with the flexibility to search for available units that is matching the preference criteria.

a. Once the preference is entered and saved, expand the grid and select the unit preference.
b. On selecting the preference, it will enable the 'Search Units' button on the action

toolbar.

c. Click on the 'Search Units' button and this will open the search unit screen with the preference auto populated in the left support pane of the search screen. The CRM system will auto filter the available units based on the preference provided by the prospect and display the result.

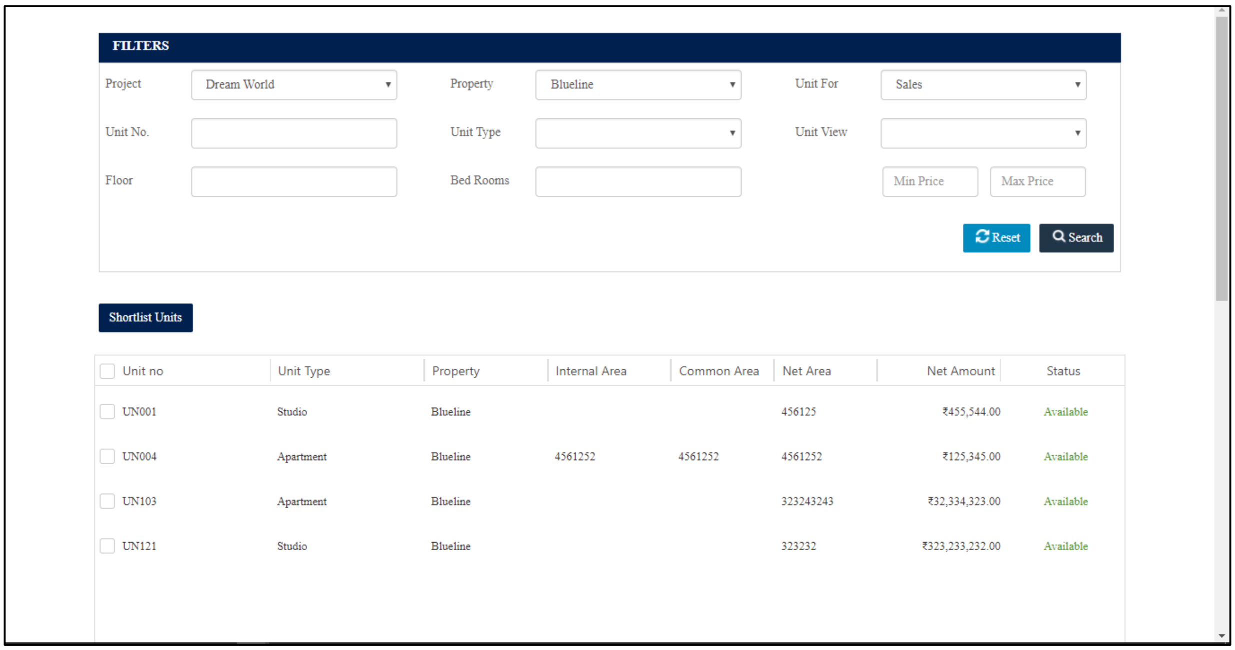


Figure 19: Search Unit Screen

Please note: The search criteria can be defined and altered based on the business process needs of the customer. Also the left support pane with the preference criteria is editable which can enable the sales people to try and alter the preference criteria and check for units that are matching the criteria.

It is important to shortlist/ reserve a unit based on the prospect's preference for further processing. This function of Property-xRM helps sales executives to shortlist one or more units for an opportunity.

a. On the search result screen, select the check box to the right of the available unit that the prospect would like to shortlist.
b. Once you have selected the unit click on the 'Shortlist Units' button on the top of the search unit screen.

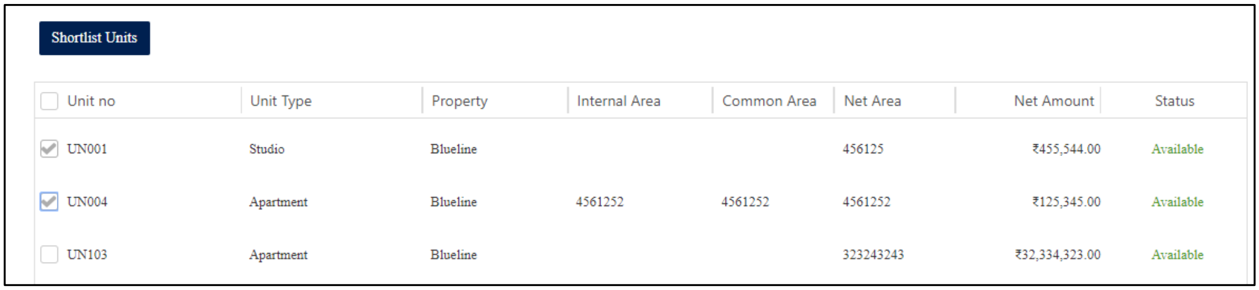


Figure 20: Shortlist Unit Form

c. Once the user shortlists the unit, CRM associates the unit to the opportunity and also changes the status of unit to 'Reserved'. This prevents other CRM users from shortlisting the same unit for another opportunity.

d. The shortlisted units shall appear under the shortlist grid in the opportunity.

To see all the shortlisted units:

a. Go back to the Opportunity.

b. Navigate to the Shortlisted Units grid.

c. All the units that are shortlisted will be displayed in the Shortlisted Unit grid.

d. Users can also directly shortlist the units from the shortlisted units grid based on the privilege and process needs.

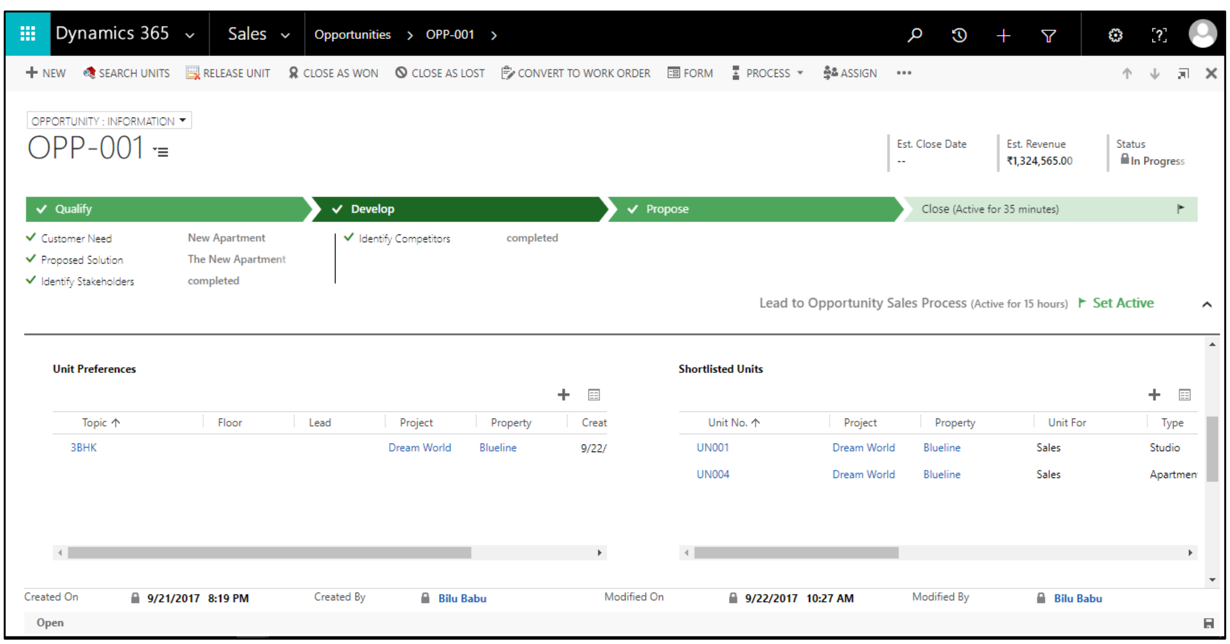


Figure 21: Shortlist Units grid on Opportunity Form

To release a shortlisted unit:

a. Go back to the opportunity
b. Navigate to the Shortlisted Units grid
c. Select the Unit that needs to be released
d. Click on the 'Release Unit' button

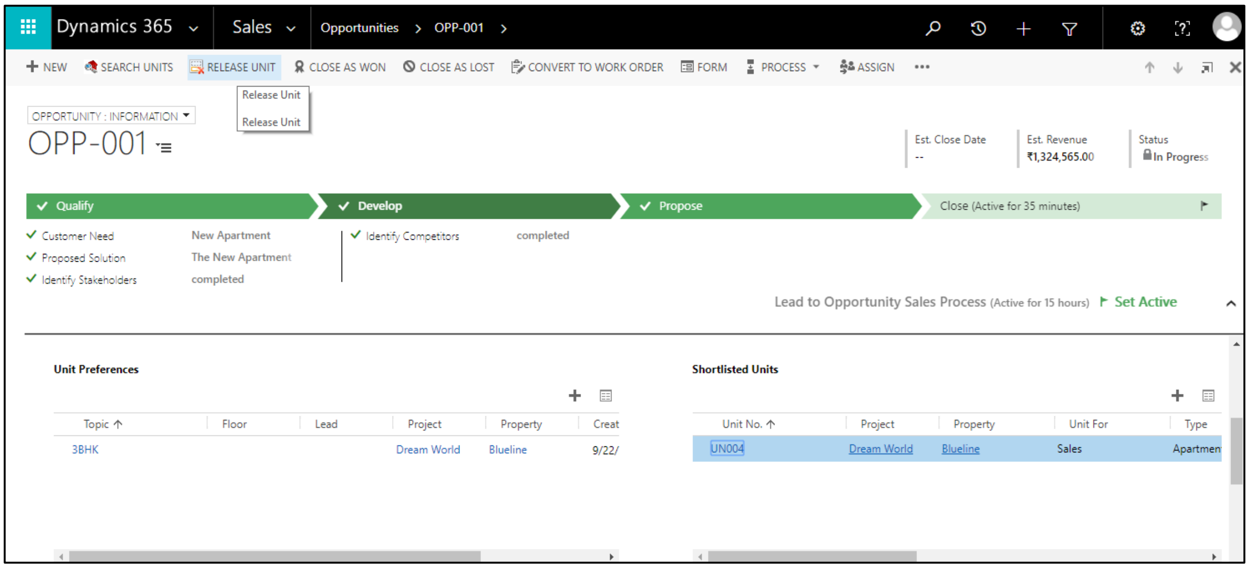


Figure 22: Release Unit Button

Please note: A unit can be released automatically after a specified amount of time defined by the customer, if no amount has been collected

2.7 Managing Offers/ Bookings

To proceed further in the sales process, the user has to provide an offer to the prospect which contains the price of the shortlisted unit along with the payment terms.

Property-xRM helps users create an offer/ booking with minimal manual intervention. Once the units are shortlisted, the user can prepare the offer/ booking through the following steps:

a. Open an existing opportunity.
b. Go to the Offer grid.
c. Click on the '+' button.

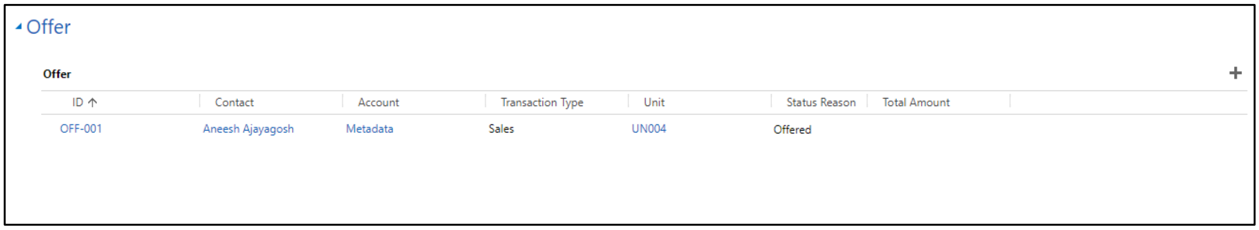


Figure 23: Offers grid on Opportunity Form

d. This will open a new Offer/ Booking for with all the details available from opportunity filled automatically.

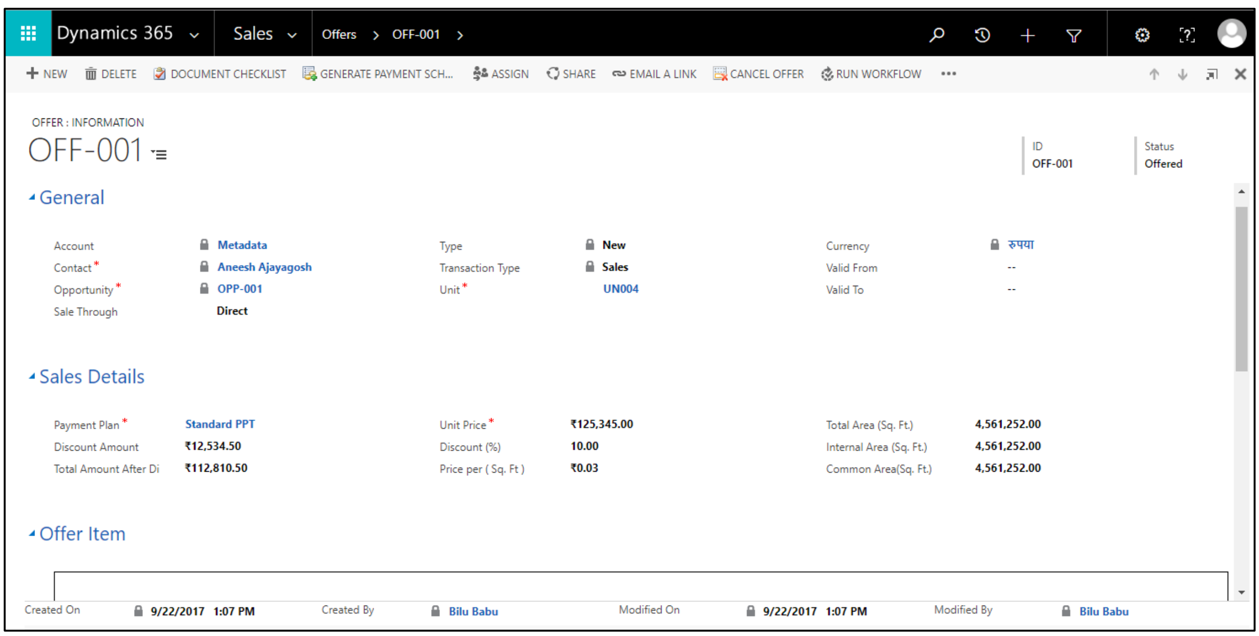


Figure 24: Offers/ Booking Form

e. The user will have to select the unit for which the Offer/ Booking has to be made. Since the system allows shortlisting of multiple units under the opportunity, the units will not be auto-filled.

f. Once the unit is selected, the user will have to select a payment plan that prescribes the payment schedule for which the prospect has to pay for the shortlisted unit. The system provides the option to create and handle multiple payment plan templates for various projects.

g. There is also option to enter the validity of the offer.

h. Upon completing the entries, click on the 'Save' button on the top ribbon to save the offer/ booking.

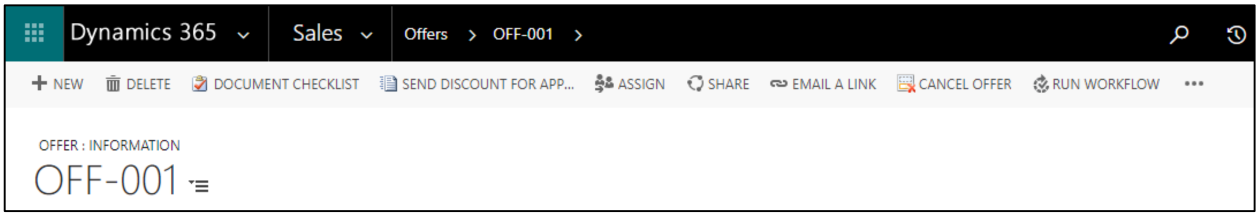


Figure 25: Discount Approval Button

Discount related Internal Approval Process (if any)

i. Discount can be given to the Unit Price by entering a Discount Amount.

j. Once the offer is saved, the user has to submit the offer for discount approval by clicking on the 'Send Discount for Approval' button. The status of the offer will change to 'Awaiting Discount Approval' at this time.

k. On submission, the offer gets submitted to his manager for approval. Once approved, the status of the offer will change to 'Discount Approved'.

l. The user then has to click on the 'Generate Payment Plan' button in order to generate the payment schedule for the customer.

<u>Note:</u> The payment schedule will be displayed taking into account the final unit price and the payment plan template selected.

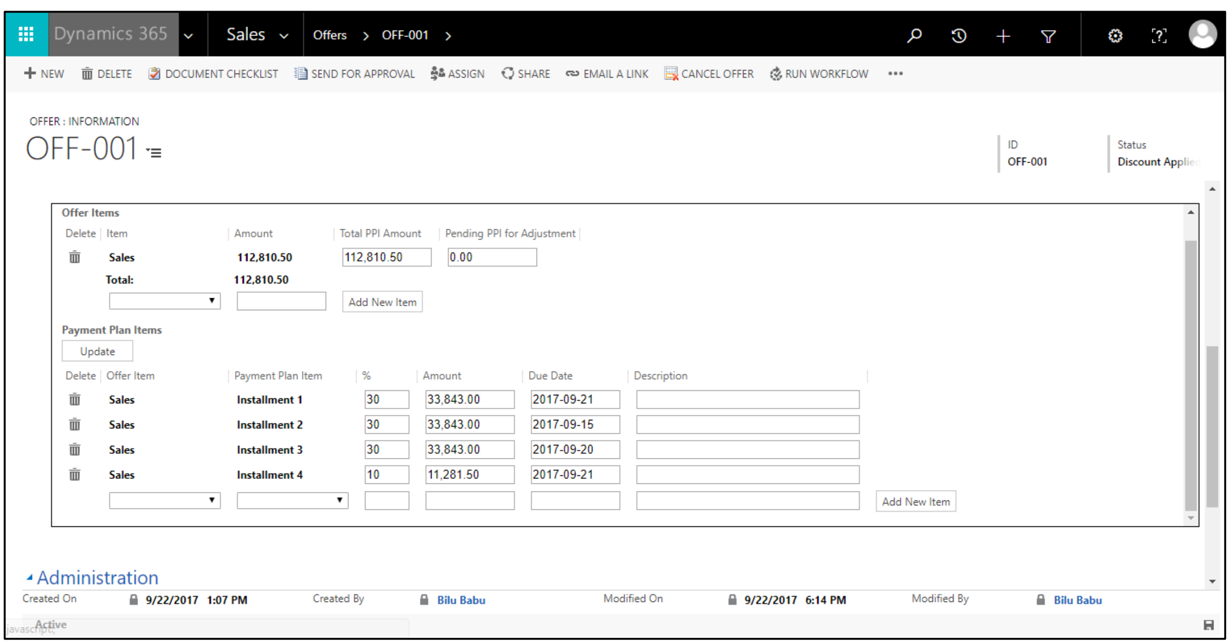


Figure 26: Payment Plan Grid on Offer/ Booking Form

Offer/ Booking Internal Approval Process

m. Once the offer is saved, the user has to submit the offer/ booking for approval. For this the user has to click on 'Send for Approval' button.
n. On submission, the offer gets submitted to his manager for approval and the status of the offer changes to Pending Approval. The manager will get a list of offers pending for approval on his dashboard.
o. The respective manager can open the Offer/ Booking and can either accept or reject the offer.
p. On acceptance, the status of the offer becomes approved/ confirmed.
q. Once the offer is approved by the manager, the user can convert the offer to sale by clicking 'Convert' button.

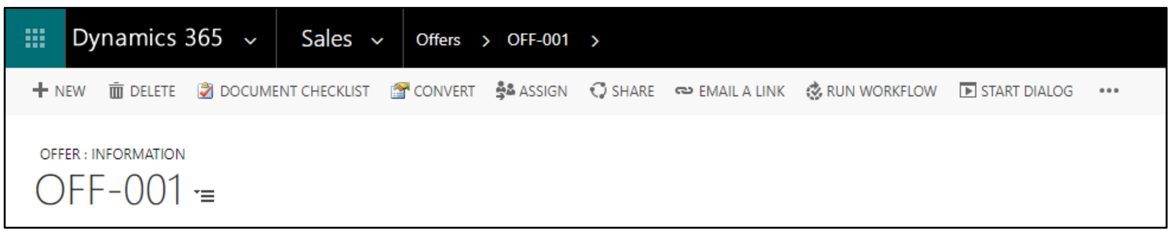


Figure 27: Convert Button.

r. This will open a new Unit Sale screen with unit sale details and status as Reserved.

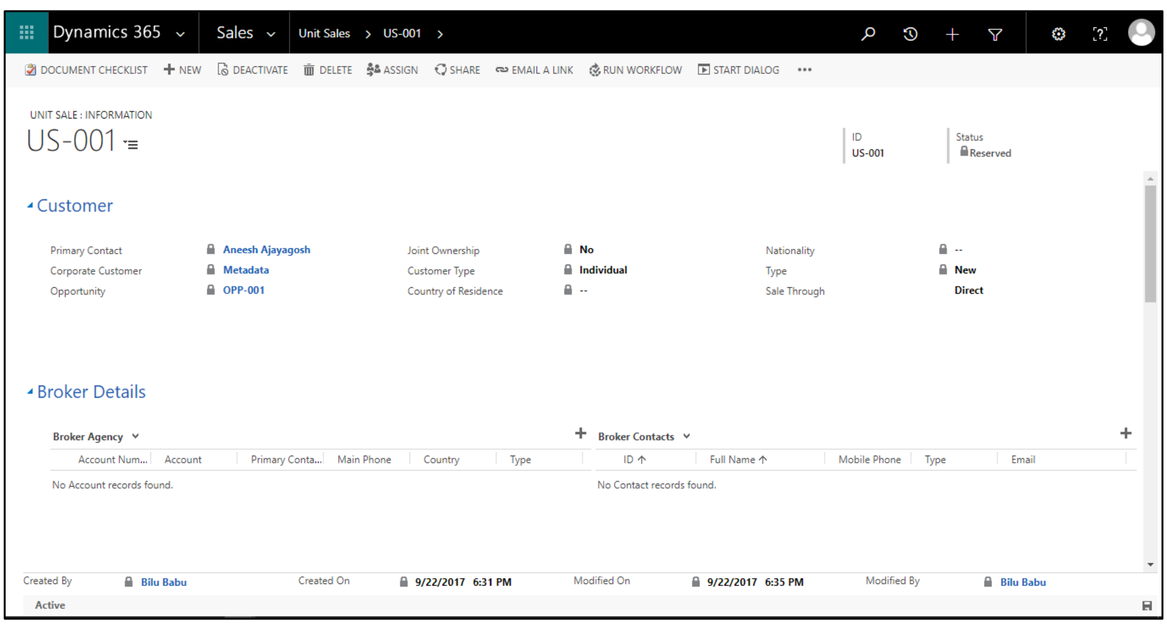


Figure 28: Unit Sale Form.

3. Troubleshooting Tips

Users are recommended to **publish all Customizations** and activate all the **Work Flows** when the application is opened for the first time.

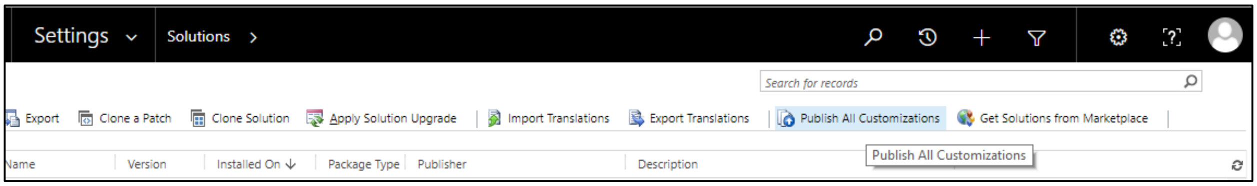


Figure 28: Publishing Customization.

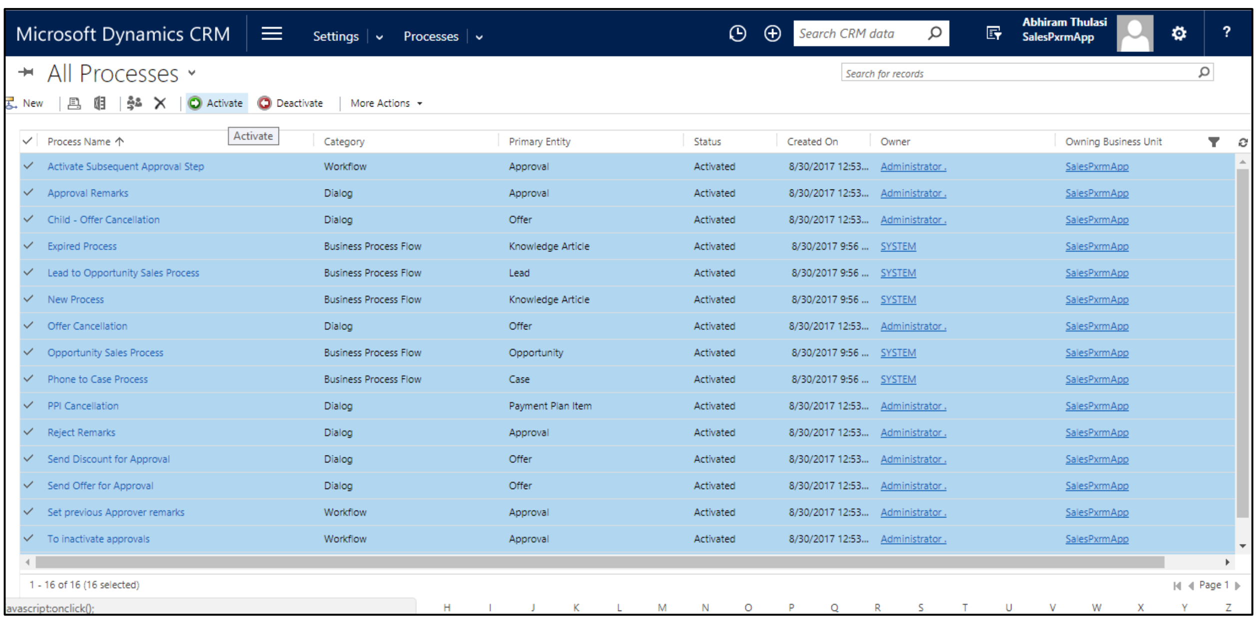


Figure 29: Activating Workflows/Dialogues.