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**Customer Relationship Management System**

**(CRM)**

The following are examples of what you need to do on the CRM. This goes into

the exact details of what you need to do. I would like to give me the price that you

would charge and what you would charge to do it along with how long it would take

you to complete.

I need a simple **Real Estate Investors CRM System.** This is not for a **Real Estate**

**Brokers** or for a **Real Estate Sales Agent.** We do different things thanthey do. I also

don’t want to use hubspot, zapier, zoho, vtiger, podio CRM system or any other

CRM system. I want a custom system done the way I want it done. This system will

be duplicated for 150 to 200 sales people so I don’t want to pay someone every

month for each system. If you have to use another system to build the system or you

are going to raise your price you should stop reading.

The following information is information about the CRM system. At the top

of the first page of the CRM I want:

(Logo) **Money Tree Real Estate Investors**

(I will send you that)

**Customer Relationship Management System**

**(CRM)**

That is what I have at the top of the page and that is what I want on the CRM.

The following should be centred on the first page of the CRM:

**Leads Zillow Craigslist**

**Skip Tracing Comps Data Categories**

**Emails Text Messages** **Letters**

**Lead List Vacant Houses Offers**

**Things to do Today**

Date

mm/dd/yyyy

**Send**

On the left side of the side of the first page it will have:

**(Logo)**

**Money Tree Admin**

**Dashboard**

**Upload Files**

**Property Tax Liens**

**Lease Options**

**Probate**

**Short Sales**

**Pre-Foreclosures**

**Foreclosures**

**Go to Auctions**

**Vacant Houses**

**Bankruptcy**

**Forms**

**Legal Contracts**

With the exception of (Logo), Money Tree Admin, Dashboard and Upload Files every

thing on the left side of the first page of the CRM are headers or categories. When

someone clicks on any one of them what should happen is they go to the **Data**

**Category** section and the Category is pulled up. An example of that would be if

They clicked on **Foreclosures** they would pull up:

**Foreclosures**

**q Finding Foreclosure Properties**

**q Great Source for Finding Under Valued Properties**

**Leads –**

I can’t attach an example of the lead form because Fiverr will only allow You to send

one attachment. Those of you that have a good price, the experience and can complete the work in the time frame we need it done in will get a copy of the Lists form.

When a person puts in a person’s name that we already have in the **Leads** section

the person’s name appears below the box and when they click on the name the

system fills out the form below it.

Below that form there is another section. **To do in the Future** those are things that

the sales person wants to send tolead on a specific date in the future.

Automatically filled in from the above information as soon as the date is put in. I need to have

to have 4 to 6 of the **To do in the Future** sections below the main **Leads** section.

The sales people put in what emails, text messages, letter or they should call the

lead on that date.

**Things to do Today**

When a sales person puts in a date and clicks send the system checks all of the sales

persons leads. It goes to the **To do in the Future** section and checks the date, if

the date matches the date that the sales person put into the **Things to do Today.**

The system would pull all of that information including the message and make a list

of them for the sales person to see.

**Zillow –**

When they click on Zillow, I want a box to appear with this in it:

**City, State**

When they put in city and state:

**Los Angeles, CA**

You will simply be going to the Zillow website. When they enter the city and state

and click can you have the system go to:

[**www.zillow.com**](http://www.zillow.com) **> los-angeles-ca**

If you can click on that it will go to this site.

[www.zillow.com-los-angeles-ca](http://www.zillow.com-los-angeles-ca)

Los Angeles Real Estate – Los Angeles CA Homes For … - Zillow

If you can click on that it will go to the correct site.

This would work in every city in the United States and Canada.

**Craigslist –**

When they click on Craigslist. You will simply be going to the Craigslist website. I

want a box to appear with this in it:

**City, State**

When they put in City and State and hit send the following would appear:

**Craigslist (City, State)**

If you can have the system click on that it will take them to the correct page.

This would work in every city in the United States and Canada.

**Sending Emails –**

I want people to be to send individual emails. I need the following things on a

form to send the emails:

**Who the email is from?**

**The name of the person sending the email**

**Name of email to be sent** (To be explained later)

**Subject**

**Address that the email is going to**

We need to have something on the form if the person can’t automatically pull up

an email, they need to be able to write an email to be sent. They need to have the

following:

**Who the email is going to?**

**Who the email is from?**

**Subject**

**Body of message**

**Ability to send the email**

**Sending Text Messages –**

For text messing we will be using a company called ClickSend. ClickSend allows

The users to send and receive text messages from a PC or a laptop. In order to set

this system up you will need to go to:

<https://developers.clicksend.com/docs/rest/v3/#introduction>

They have an API that you will need to set up the system with. Let me know if you

can set that up. We are already members.

**Skip Tracing –**

When people click on Skip Tracing, I would like you to click on:

**Fastpeoplesearch.com**

That will take them to the site. We explain what they need to do in the training

program.

**Letters –**

We can mail letters through Clicksend but it is really expensive. How I would like

that to work is that the sales people would be able to type an individual letter

or they could send one from the **Data Categories.** Once the letter is received

at the **Letter** section it should be automatically emailed to an email address that

I will provide you. Our people will have the letter put on better paper, address an

envelope, put a stamp on it and mail it.

**Sending Multiple Emails –**

Need to be able to send out a single email to a number of people at the same

time.

**Data Categories**

**q Leads q Zillow q Craigslist q Sending Emails q Sending Letters**

**q Legal Contracts** q **Forms q Phone Scripts q Sales Scrips q Letters**

**q Emails q Text Messages q Lease Options q Probate q Short Sales**

**q Pre-Foreclosures q Foreclosures q Property Tax Liens q Comps**

**q Vacant Houses q Bankruptcy q We Pay! You Stay in Your Home!**

The above descriptions would be headers. When people clicked on them, the system

would go to the **Data Categories** and pull up that header and it would show all of

of the data that is stored under that category. An example if someone clicked on

**Legal Contracts** this is what would appear:

**Legal Contracts –**

**q Residential Lease and Option to Purchase Agreement**

**q Alabama Residential Purchase Agreement**

**q Alaska Residential Purchase Agreement**

**q Arkansas Residential Purchase Agreement**

**q California Residential Purchase Agreement**

You need to set this system up so our people can add data to each of the categories

above. We have a lot of the data stored on Word. The problem is a lot of our Virtual

Assistants that will be adding data will not have Word.

I also need another section for the **Leads** that we have made an offer on. I

should have that in a few days.

The following 3 things need to be put under the other 9 things that re in the middle

of the first page on the CRM.

**Lead List**

The **Lead List** is a list of all the leads that sales person has in the system. The

following is what should be on the **Leads List:**

**Cell Land**

**Persons Phone Line Home Mailing**

**Name Number Number Email Address Address Notes Status**

**Vacant Houses**

The **Vacant House** program allows our sales people to locate vacant houses in any

city in the United States and it is updated on a daily basis. The information they get is

the address of the property, the owners name, current address where the owner

lives, their land line and cell phone number and in most cases their email address.

The following is the login you need to use so our people can get into the system:

<https://www.awesomrei.com/login/>

UN: [moneytreeca@yahoo.com](mailto:moneytreeca@yahoo.com)

PW: cgaeveer

**Offers**

The **Offers** section is very similar to the **Lists** section. Again, we will send you an

example of the **Offers** section if your price, experience and the time it will take you

to complete the project are in our range we will provide you with the information

for the **Offers** and the **Lists** sections.

The following is an example to show you what first 5 sections should look like. You

should click on each of those to see how they work. Please go to the following section

to see what the system should look like:

<http://pakcodes.com/demo/realestate>

User ID: admin

Password: admin

That will take you to the first page of CRM. A form will appear at the top and bottom

of the form it has:

Change your password

OK

Just click on OK and the form disappears.

Please let me know if you don’t understand something. Or if you have any questions

please ask me.

I’m also planning on putting on a number of people that will be using the system. Let

me know if you can set this program up to be able have multiple users. Either way

could you let me know what you would charge to set the system up so each person

would have a password to get into their system. Because many of these people will

be paid by the hour, I would like to be able to look at their systems to see what they

are doing.

I need to have you put something on the internet so I can see the progress of the job

like the person that did pakcodes.com/demo/realestate.

Also, if you ask me what my budget is you will not hear back from me!

I have a lot more work to be done after the CRM and the Training Manual are

completed.

Thanks

Bob