POSEIDON REAL ESTATE CMS
User Manual

DEVELOPER CONTACT
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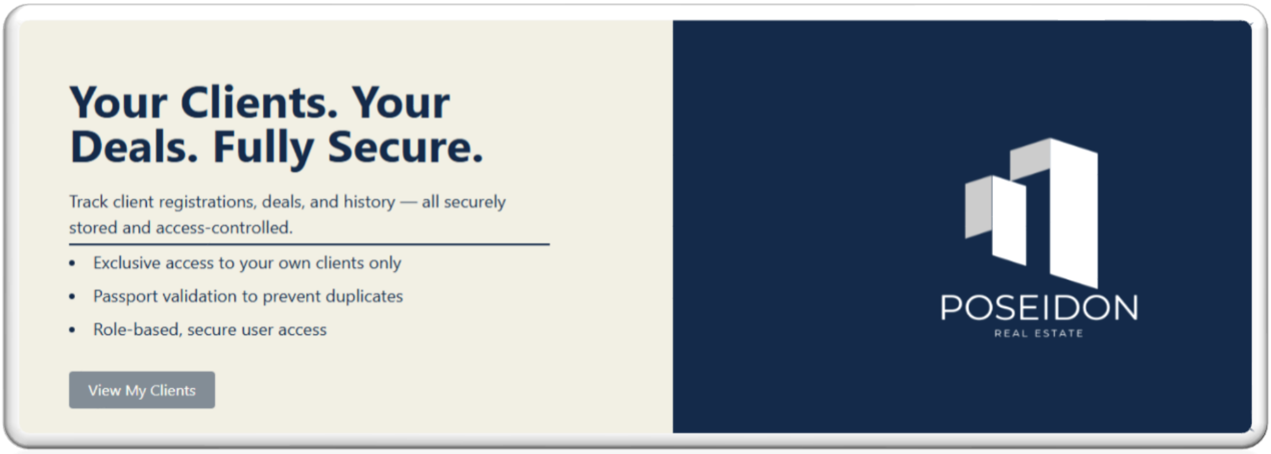
GETTING STARTED

SYSTEM OVERVIEW

Poseidon Real Estate CMS is a comprehensive client relationship management system designed for realestate operations. The system manages relationships between channel partners, clients, and administrators while facilitating document sharing, meeting coordination, and communication tracking.



USER ROLES

Channel Partners: Register clients, manage lead sources, respond to documents

Admins: Oversee all operations, approve users, manage documents, coordinatemeetings

FIRST LOGIN

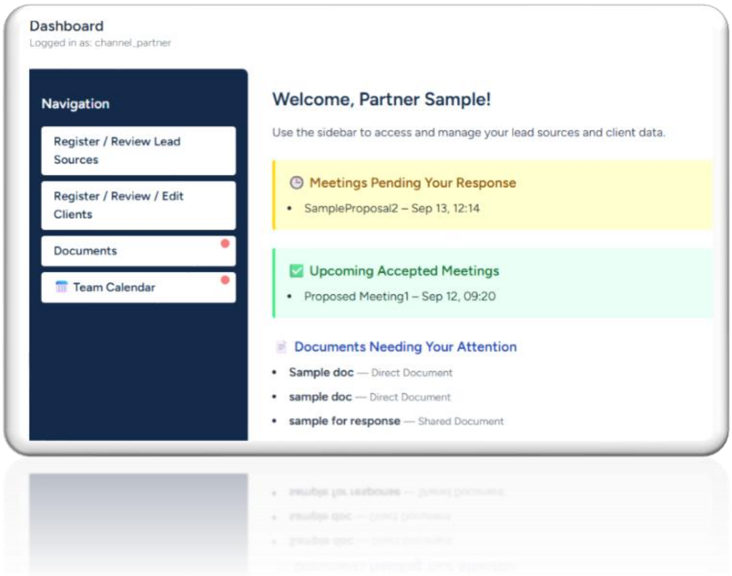
1. Access the system at your provided URL
2. Log in with provided credentials
3. Once logged in, you'll access your role-specific dashboard

CHANNEL PARTNER GUIDE

DASHBOARD OVERVIEW

Your dashboard displays:

- Pending meeting invitations requiring your response
- Upcoming accepted meetings
- Documents needing your attention (with red dot indicators)



CLIENT MANAGEMENT

Registering New Clients

1. Go to "**Register / Review Lead Sources**"
2. Enter your Lead Source names and register your Lead Sources
3. On the form for adding a new Client, you can then select a Lead Source from a list
4. Navigate to "Register / Review / Edit Clients"
5. Click "+ Add New Client"
6. Complete all required fields:
   - Personal information (name, email, phone, passport)
   - Contact preferences and language
   - Investment details (budget, property type, locations)
   - Lead source information
   - Any other information required by the form
7. Submit the form
8. In case a Client has already been registered by another partner, passport number will be marked red and the app will notify you of a duplicate entered

MANAGING EXISTING CLIENTS

1. View all your clients in the clients list
2. Use filters to find specific clients

3. Search client by name, select "Edit" action to update client information or “Delete” client, if needed
4. Add communications and documents as needed, in the corresponding tabs

COMMUNICATION TRACKING

1. Open Register / Review / Edit Clients
2. Navigate to the "Contact" tab
3. Select Client to add new note
4. Record - Date and time of contact, action (call, e-mail, meeting), Feedback, Outcome
5. Click Save Note

CLIENT DOCUMENTS

1. Navigate to "Register / Review / Edit Clients"
2. Click on the Documents" tab
3. Select a client’s name to add new document (a form will appear)
4. Choose File
5. Click Upload

PARTNER DOCUMENT MANAGEMENT

Reviewing Documents

1. Check your "Documents" section (red dot indicates pending items)
2. Review documents assigned to you by admins
3. Documents may be:
    - **Review Only**: Acknowledge after reading
    - **Response Required**: Upload completed forms or responses
    - **Responding to Documents**
4. Open the document requiring response
5. Download, complete/sign any forms if sent by the admin
6. Upload your response file
7. Submit for admin approval

Acknowledging Documents

1. For review-only documents, click "Acknowledge"
2. This confirms you've read and understood the content

MEETING MANAGEMENT

Responding to Meeting Invitations

1. Check your dashboard for pending invitations
2. Navigate to "Team Calendar"
3. Review meeting details (time, agenda, attendees)
4. Click "Accept" or "Decline"
5. Responses are tracked and visible to admins

Proposing New Meetings

1. Navigate to "Team Calendar"
2. Click "Propose New Meeting"
3. Fill in meeting details: title and description, proposed date and time, select attendees
4. Submit proposal for admin approval
5. You'll receive an email once the admin approves or modifies your proposal

REPORTS

1. Access "Download My Clients Report" from your clients page
2. This generates an Excel file with all your client data
3. Use for personal records and analysis

COMMUNICATION & DOCUMENT MANAGEMENT

Email Notifications

The system automatically sends emails for:

- New document assignments
- Document response submissions
- Meeting invitations and updates
- Meeting proposal submissions
- Account approval notifications (for admins)

Document Workflow

1. **Admin uploads** document for partner(s)
2. **Partner receives** email notification
3. **Partner reviews** and responds as required
4. **Admin reviews** response and approves
5. **Process completes** with status update

File Management

- Supported formats: PDF, DOC, DOCX, JPG, JPEG, PNG, XLSXMaximum file size: 5MB
- Files stored securely with time-limited access
- Automatic file organization by user and date

MEETING MANAGEMENT

Meeting Types

- **Admin-Created Meetings**: Standard meetings scheduled by admins
- **Partner Proposals**: Meeting requests submitted by partners for approval

Meeting Workflow

1. **Creation/Proposal**: Meeting scheduled or proposed
2. **Invitations Sent**: Email notifications to attendees
3. **Partner Responses**: Accept/decline tracking
4. **Meeting Occurs**: Calendar integration and dashboard reminders

Calendar Features

- Visual calendar display with meeting details Status indicators (accepted, pending, declined)
- Time zone handling for global teams
- Meeting history and attendance tracking

REPORTING

AVAILABLE REPORTS

For Channel Partners

- **My Clients Report**: Excel export of all assigned clients; Includes client details, communication history, and investment preferences

For Admins

- **Comprehensive Client Report**: All clients across all partners

TROUBLESHOOTING

Common Issues

Document Access Issues

- Verify you have permission to access the document
- Check if document links have expired (10-minute time limit)
- Ensure stable internet connection for file downloads

Meeting Invitation Problems

- Check email for invitation notifications
- Verify calendar permissions and time zone settings
- Contact admin if invitations aren't received

File Upload Issues

- Verify file format is supported
- Check file size is under 5MB limit
- Ensure stable internet connection
- Try different browser if problems persist

Getting Help

- Use dashboard red dot indicators to identify pending items
- Check email notifications for system updates
- Contact system administrators for technical issues
- Refer to this manual for workflow guidance

Best Practices

- Regularly check dashboard for pending items
- Respond promptly to meeting invitations
- Keep client information updated
- Upload documents in supported formats
- Maintain professional communication standards

SYSTEM FEATURES SUMMARY

Security

- Role-based access control
- Secure file storage with temporary access links
- Email notifications for all critical actions
- Audit trail for document and meeting activities

Automation

- Automatic email notifications
- Calendar integration
- Status tracking and updates
- Red dot indicators for pending items

Integration

- Time zone handling for global operations
- Excel export capabilities
- Email system integration
- Calendar synchronization

This manual covers the core functionality of Poseidon Real Estate CMS. For additional support or feature requests, contact your system administrator at mk@poseidonhumancapital.com