**Business Requirements Document (BRD)**

**Project Title: CRM Requirements for Jahagirdaar Properties**

**Prepared By: [Your Name]**

**Date: [Insert Date]**

**1. Introduction**

**1.1 Project Overview**

The project aims to develop a Customer Relationship Management (CRM) system and a dynamic website for Jahagirdaar Properties, addressing the specific needs of Real Estate Channel Partner Firms and Property Management Firms. The system will streamline lead management, property management, commission tracking, tenant management, financial management, and reporting processes, along with delivering a feature-rich, user-friendly website.

**1.2 Objectives**

* Automate and streamline lead management and property tracking processes.
* Provide tools for efficient commission tracking and financial reporting.
* Simplify tenant management and maintenance workflows.
* Deliver actionable reporting and analytics to improve decision-making.
* Develop an interactive website for enhanced user engagement and property browsing.

**1.3 Scope**

The project includes the development of the following modules:

1. Lead Management
2. Property Management
3. Commission Tracking
4. Tenant & Maintenance Management
5. Financial Management
6. Reporting and Analytics
7. Website Features

**2. Business Requirements**

**2.1 Lead Management**

| **Requirement ID** | **Requirement Description** |
| --- | --- |
| LM-01 | Capture leads from multiple sources (website, social media, referrals, etc.). |
| LM-02 | Assign leads to agents or teams based on predefined rules. |
| LM-03 | Allow tracking of lead status (New, Contacted, Qualified, Converted, etc.). |
| LM-04 | Enable personalized communication (emails, SMS, calls) with leads. |
| LM-05 | Implement lead prioritization based on potential and interest levels. |
| LM-06 | Provide a lead nurturing workflow with automated follow-up reminders. |

**2.2 Property Management**

| **Requirement ID** | **Requirement Description** |
| --- | --- |
| PM-01 | Manage property listings, including details (type, location, size, price, availability). |
| PM-02 | Track property inquiries and schedule viewings. |
| PM-03 | Generate property performance reports (inquiries vs. conversions). |
| PM-04 | Manage property-related documentation (agreements, brochures, etc.). |
| PM-05 | Allow uploading of high-quality images, videos, and virtual tours of properties. |

**2.3 Commission Tracking**

| **Requirement ID** | **Requirement Description** |
| --- | --- |
| CT-01 | Automatically calculate commissions for channel partners based on defined rates. |
| CT-02 | Generate commission statements and detailed reports. |
| CT-03 | Track commission payments (paid, pending, overdue). |
| CT-04 | Provide alerts for upcoming or overdue payments. |

**2.4 Tenant & Maintenance Management**

| **Requirement ID** | **Requirement Description** |
| --- | --- |
| TM-01 | Maintain tenant records, including personal details and lease agreements. |
| TM-02 | Track tenant interactions and communications. |
| TM-03 | Manage tenant complaints and maintenance requests. |
| TM-04 | Schedule and track property maintenance tasks. |
| TM-05 | Manage relationships with service vendors and contractors. |
| TM-06 | Provide maintenance task updates and completion notifications. |

**2.5 Financial Management**

| **Requirement ID** | **Requirement Description** |
| --- | --- |
| FM-01 | Track rental income and property expenses. |
| FM-02 | Generate financial reports (cash flow, profit/loss statements). |
| FM-03 | Manage property taxes, insurance payments, and renewals. |
| FM-04 | Provide reminders for due payments and renewals. |

**2.6 Reporting and Analytics**

| **Requirement ID** | **Requirement Description** |
| --- | --- |
| RA-01 | Generate sales performance reports (lead conversion rates, agent performance). |
| RA-02 | Provide property performance analytics (viewings, inquiries, conversions). |
| RA-03 | Track KPIs for tenant satisfaction, maintenance resolution times, etc. |
| RA-04 | Allow visualization of data through charts, graphs, and dashboards. |

**3. Website Features**

**3.1 User Interface**

| **Requirement ID** | **Requirement Description** |
| --- | --- |
| UI-01 | Develop a clean, user-friendly interface for easy navigation. |
| UI-02 | Optimize the website for desktop, tablet, and mobile devices. |
| UI-03 | Provide a secure login section for property owners, tenants, and agents. |

**3.2 Property Listings**

| **Requirement ID** | **Requirement Description** |
| --- | --- |
| WL-01 | Display detailed property listings with filters (location, price, size, etc.). |
| WL-02 | Allow advanced search options with customizable filters. |
| WL-03 | Integrate high-quality images, videos, and virtual tours (3D view). |
| WL-04 | Include interactive maps for property locations. |

**3.3 Contact and Inquiry Forms**

| **Requirement ID** | **Requirement Description** |
| --- | --- |
| CF-01 | Provide inquiry forms for potential buyers, tenants, and partners. |
| CF-02 | Enable submission of requests for property viewings or information. |

**3.4 Online Transactions**

| **Requirement ID** | **Requirement Description** |
| --- | --- |
| OT-01 | Facilitate secure online transactions (deposits, rent payments, etc.). |
| OT-02 | Provide transaction history and payment confirmations. |

**3.5 Customer Support**

| **Requirement ID** | **Requirement Description** |
| --- | --- |
| CS-01 | Include a chat feature or help desk for customer queries. |
| CS-02 | Provide FAQs and support contact details. |

**3.6 Social Media Integration**

| **Requirement ID** | **Requirement Description** |
| --- | --- |
| SM-01 | Integrate social media platforms for property promotion. |
| SM-02 | Enable sharing of property listings on social media. |

**4. Assumptions and Constraints**

* Assumptions:
  + Stakeholders will provide timely feedback and clarifications.
  + Necessary integrations (e.g., payment gateways) will be made available.
* Constraints:
  + System must comply with real estate and legal regulations.
  + Website must support high traffic and fast load times.

**5. Success Criteria**

* Efficient lead capture and conversion tracking.
* Smooth management of properties, tenants, and maintenance workflows.
* Accurate calculation and reporting of commissions.
* Interactive, user-friendly website with advanced property search features.
* Positive user feedback and improved operational efficiency.

**6. Appendix**

* Glossary of Terms
* References
* Stakeholder List

**End of Document**

**Agile Work Breakdown Structure**

**Frontend Developers**

1. Develop UI for:
   * Lead Management (Lead capture form, list view, lead assignment, and follow-ups).
   * Property Management (Property listings, details page, inquiries).
   * Commission Tracking (Display commission details and reports).
   * Tenant & Maintenance Management (Tenant records, maintenance forms, notifications).
   * Financial Management (Income/expense screens, financial reports).
2. Develop dynamic components for:
   * Search filters and advanced property search.
   * Virtual tour integration and 3D property view.
3. Build responsive UI for:
   * Website navigation, inquiry forms, and dashboards.
4. Implement social media sharing features.
5. Integrate frontend validation and UI consistency.

**Backend Developers**

1. Develop APIs for:
   * Lead Management (capture, track, prioritize, assign leads).
   * Property Management (CRUD operations for properties, inquiries, documents).
   * Commission Tracking (commission calculations and payment tracking).
   * Tenant Management (CRUD operations for tenants, lease agreements).
   * Maintenance Management (scheduling, vendor tracking, notifications).
2. Implement:
   * Financial management logic (income/expenses, reports, tax reminders).
   * User authentication and role-based access control.
   * Integration with payment gateways for secure transactions.
3. Design and optimize the database for all modules.
4. Develop reporting and analytics logic (KPIs, dashboards).
5. Integrate third-party tools for virtual tours, notifications, and analytics.

**QA Tester**

1. Functional testing for:
   * Lead Management workflows (lead capture, assignment, follow-ups).
   * Property Management operations (CRUD, search, reports).

Estimated Project Time -

Development - 1 week - Backend and frontend development of CRM and website features.

Testing & Deployment - 1 week

Team Size -

Frontend Developer - 2 Employees

Backend Developer - 2 Employees

Tester - 1 Employee