Glossary for the Real Estate System

**Agency –** The Real Estate Agency

**Agency Staff Member** – could be any of the agency staff (Receptionist, Broker, Agents etc.)

**Agent –** a person licensed to market, negotiate and transact the sale of real estate on behalf of a property owner. The agent lists a property for sale and may sell the property. Any agent can sell a property to a customer. If an agent other than the listing agent sells the property, the listing agent receives 3% of the 7% commission.

**Broker** – the owner of the Real Estate Agency. The real estate broker can act as an agent when he/she chooses to, but normally concentrates on overseeing the real estate agency’s day to day business.

**Listing –** A property placed for sale with a Real Estate Agency on contract with a particular agent for a three-month period (listings can be renewed)

**Showing –** an appointment for a customer to view a particular property listing with a given agent

**Customer –** one or more people who wish to buy, view, and/or sell properties listed for sale. They have had their personal information recorded in the system, and when listing properties they must associated with an agent.

**Potential Customer** – someone visiting the website who has not yet had his/her personal information recorded.

**Property** – a parcel of land, or dwelling on a lot that is owned by a customer and can be part of a listing with an agent

**Prospective Agent** – an Agent that has not yet been added to the system.

**User** – an agency staff member who has been authenticated

**Authorized User** – a user who is authorized with a particular level of access that allows him/her entry to certain areas of the agency web site.

**Use Case**: Create Agent

**Iteration #**: E1 **Date**: Sept 15, 2019

**Priority:** High **Version: 3**

**Description:** A new prospective agent joins the Agency. An agency staff member records all his/her pertinent agent details into the system. Once the agent profile is recorded, the new agent is then able to access all areas of the system that agents will need, with the authorization to perform the required associated tasks.

**Actor(s)**: Agency Staff Member, Prospective Agent / Agent

**Precondition:** Agency Staff Member must already be logged in and authorized

**Typical Course of Events:**

1. This use case begins when an agency staff member needs to create a new Agent profile in the system.
2. The agency staff member asks the prospective agent for any required personal information to create the profile
3. The agency staff member enters information such as: Social Insurance Number, First Name, Last Name, Middle Name (optional), LoggedInUserName, Street Address, Municipality (town/city), Province, Postal code, Home Phone Number, Cell Phone Number, Office Email, Office Phone Number, date of birth **\*005 \*009**
4. The agency staff successfully saves the information in the system.
   1. **System Response:** Data is validated, and a confirmation prompt indicates that the data has been successfully saved
   2. **System Response:** the agency staff member is associated as the creator of the new agent profile record.
   3. **System Response:** a unique id and date of employment is created in the system for the new agent
   4. **System Response:** the level of access of ‘agent’ will be assigned to this new user of the system
   5. **System Response:** a temporary password is generated for the user and emailed to them.
5. The Agent may now take advantage of his/her new access level and will have authorization to do all the tasks that agents can do in the system.

**Alternative Course of Events:**

**Error Conditions:**

Line 4 – invalid or absent data. Prompt for retry and re-entry.

**Business Rule Applications:**

009 – Personnel Privacy Policy

010 – Employment Age Requirement

**Use Case**: Create Customer

**Iteration #**: E1 **Date**: Sept 15, 2019

**Priority:** High **Version: 3**

**Description:** A potential customer wishes to become a customer of the Agency. An agency staff member records all the pertinent customer details into the system. The new customer is then able to take advantage of agency services such as: booking showing appointments with an agent, viewing listings, or buying or selling property.

**Actor(s)**: Potential Customer/Customer, Agency Staff Member

**Precondition:** Agency Staff Member must already be logged in and authorized

**Typical Course of Events:**

1. This use case begins when a potential customer wishes to become a customer of the agency.
2. An agency staff member asks the potential customer for the required personal information to create a customer account
3. The potential customer provides the information such as: First Name, Last Name, Middle Name (optional), Street Address, Municipality (town/city), Phone Number, Email (if applicable), date of birth **\*001**
4. The agency staff successfully records the information in the system.
   1. **System Response:** Data is validated, and a conformation prompt indicates that the entry is complete
   2. **System Response**: a unique id is created in the system for the new customer
5. The Customer may now take advantage of the Agency Services.

**Alternative Course of Events:**

Line 3 – the potential customer is not legal age. The use case ends without creating a new customer. **\*001**

Line 3 – the customer does not have a required proof of identity**\*001**. The use case ends without the customer being given a membership until the proof can be obtained.

**Error Conditions:**

Line 4 – invalid or absent data. Prompt for retry and re-entry.

**Business Rule Applications:**

001 – Customer Age Requirement **Use Case**: Save Listing

**Iteration #**: E1 **Date**: Sept 15, 2019

**Priority:** High **Version: 3**

**Description:** An agent will enter new listing details for customer properties into the system or update existing listing details as required.

**Actor(s)**: Agency Staff Member

**Pre-condition**: Agent is already logged in and authorized, and Customer record has been previously recorded in the system (see use case Save Customer)

**Section Main:**

**Typical Course of Events:**

1. This use case begins when an agency staff member must create a new listing or make changes to an existing listing
2. The Agency Staff Member searches for the appropriate customer in the system using criteria such as last name and/or first name, or phone number.
   1. **System response**: one or more customer records display
3. The Agency Staff Member selects the appropriate customer with which to associate the property listing based on the criteria entered
   1. **System Response**: should the selected customer have other listings in the system, a brief view of listing information will display such as start and end date, street address, owner and agent
4. To save a new listing: see section “**Save New Listing**”, to save modifications made to an existing listing: see section “**Save Listing Details**”
   1. System response: a confirmation message displays indicating that the details have been saved

**Alternative Course of Events:**

Line 2: there are no results returned for the given search criteria. Indicate the problem and prompt the staff member to try again

Line 2: the customer may not have been entered into the system yet. The Agency Staff Member must implement the Create Customer use case prior to saving the listing.

Line 2: invalid or incomplete search criteria were provided. Indicate the error and prompt the staff member to correct the problem

**Section: Save New Listing**

1. the Agency Staff Member enters the new property listing details to associate with the selected customer such as: the street address, municipality (village/town/city), province and postal code of the property, the square footage, the number of beds and baths, area of the city (West End, North End, etc.) summary of property features (water view, close to schools, close to park, on bus route etc.), type of heating, if the property has a fireplace, garage, etc., as well as the price, the listing agent and an indication that the listing contract has been signed with the customer. **\*002 \*003 \*007**. If images for the given listing already have been uploaded, they can be selected for display at this time. **\*006**
2. the Agency Staff Member indicates that the listing data should be saved **\*002 \*003 \*007**
   1. **System Response:** the listing is saved, and a new listing id is generated
   2. **System Response:** the listing start, and end date are saved with the current date as start date and a date 3 months in the future as end date **\*002**
   3. **System Response:** when the presence of a signed contract has been indicated, the agent becomes associated with the property listing and his/her contact information (first name, last name, email, cell phone, and office phone number) will be displayed when potential buyers view the listing online
   4. **System Response:** the listing status is set to ‘available’
   5. **System Response:** the listing becomes viewable online

**Alternative Courses:**

Line 1: The contract hasn’t been signed or is not present, so although listing details save, the Agent cannot be associated with the listing and the listing will not appear on the Agency website. The listing status is set to ‘not available’.

Line 1: There are no pre-existing images in the system for this listing. The listing will display an image that says ‘picture not yet available’ until such time as images can be uploaded and associated to this listing. For uploading of images see Use Case “Upload Images”. **\*006**

Line 2: the listing was created in error or associated with the wrong customer record. As long as an agent has not been assigned the listing may be cancelled by any agency staff member. If an agent was assigned, only the broker has the permission to cancel the listing. **\*008**

**Section: Save Listing Details**

1. The agency staff member selects the property listing that requires modification
2. makes modifications to the existing property address and/or property description details or associates additional pictures of the property that are available within the system. **\*002**
3. The agent indicates that the listing data should be saved