

APRICOT PROPERTY SOLUTIONS SCOPE OF WORKS DOCUMENT





Project Overview

This document outlines the scope of works for the development and implementation of three integrated systems: Lease Management, Sales CRM, and Tenant CRM. These systems aim to streamline lease handling, optimize sales processes, and enhance tenant communication and engagement.

1. Lease Management System

Objective

To automate and optimize lease management, enabling users to upload, extract, store, and track lease details with AI-powered capabilities and automated alerts.

Features

1. Lease Upload and AI Extraction

- Users can upload lease documents in various formats.
- AI extracts relevant information such as lease terms, start and end dates, renewal terms, and increment clauses.
- Extracted data is stored in a centralized database.

2. Alert System

- Automatic alerts for lease expiration, renewal, and rent increment.
- Notifications sent via email to designated users.

3. Database Management

- Store and retrieve lease details efficiently.
- Ensure data integrity and security.

2. Sales CRM System

Objective

To provide sales teams with tools to manage leads, track opportunities, and enhance customer relationships, supported by activity planning and robust reporting.

Features

1. Lead and Opportunity Management

- Lead Generation and Enrichment: Capture leads from various channels, enrich lead profiles with relevant details, and prioritize based on scoring criteria.
- Pipeline Management: Visualize sales pipelines to track the progress of opportunities and identify bottlenecks.



2. Activity and Communication Tools

- Activity Scheduling: Schedule calls, meetings, and follow-ups with reminders and notifications.
- Centralized activity tracking for sales teams to ensure alignment.

3. Reporting and Analytics

- Generate custom reports for sales performance, lead conversion, and revenue forecasting.
- Visualize key metrics through dashboards.

3. Tenant CRM System

Objective

To provide tenants with a user-friendly portal for managing their accounts, payments, and service requests while enabling transparent communication with management.

Features

1. Tenant Login

- Secure login for tenants to access their accounts.

2. Upcoming Service Charges

- Display upcoming service charges with payment deadlines.
- Automated warnings for outstanding payments, highlighting potential service disconnection.

3. Service Ticket Management

- Tenants can raise service ticket requests.
- Real-time tracking of ticket status (e.g., Open, In Progress, Resolved).

4. Emergency Contact List

- A dedicated section listing emergency numbers for quick access.

5. Transaction History

- Viewable record of all past payments and charges.

6. Tenant Details

- Display tenant-specific details such as contact information, lease details, and account status.



7. Payment Gateway Integration

- Enable tenants to make secure payments for service charges and outstanding balances.

Project Deliverables

1. Lease Management System

- Web-based application for uploading and managing leases.
- Integration of AI tools for data extraction.
- Notification system integrated with email services.

2. Sales CRM

- Customizable dashboards for sales teams.
- Full suite of CRM tools for lead management, pipeline visualization, and activity scheduling.
- Analytics and reporting tools.

3. Tenant CRM

- Tenant portal with secure login.
- Modules for service charges, ticketing, payments, and transaction history.
- Integration with payment gateways and notification systems.

Exclusions

- The scope does not include third-party integrations outside the specified payment gateway or AI service tools.
- Mobile app development is not included in this phase but can be considered for future iterations.

Assumptions

1. All required lease documents will be provided in a standardized format for efficient AI processing.
2. Necessary APIs for email notifications and payment gateways will be available and accessible.
3. End-user training and support will be provided as part of the deployment phase.



Timelines and Milestones

Development

1. **Lease Management System:** 2 weeks
2. **Sales CRM:** 8 weeks
3. **Tenant CRM:** 8 weeks

Testing and QA: 4 weeks

Deployment and User Training: 2 weeks

Conclusion

This scope of works ensures the development of three interconnected systems designed to enhance operational efficiency, improve tenant satisfaction, and optimize sales processes. Each system will be built to support scalability and future integrations.