Coldwell Banker UAE — Consolidated Policies

Compiled from provided policy content.

# Conflict Resolution Policy

Zubair

​

"Coldwell Banker Conflict Resolution Policy"

1. Documentation and System Usage

Mandatory System Entries: All agents are required to document every interaction with clients in the company's Customer Relationship Management (CRM) system. This includes emails, phone calls, meetings, property viewings, and negotiation progress.

Data Completeness: Records must include accurate timestamps, client feedback, and any relevant documents. This ensures a verifiable trail of communication.

Consequences of Non-Compliance: Failure to log data appropriately will result in the agent being unable to substantiate their claims in case of a dispute. The agent with the most complete and recent records will be favored.

2. Precedence of Recent Interactions

Priority Rules: When conflicting claims arise, the agent with the most recent, well-documented interactions will take precedence.

Verification Process: The management will review system logs, including dates and content of communications, to determine the agent with priority.

No Documentation, No Defense: Agents without documented records in the system will forfeit their position in the dispute. The system data will be considered final and binding.

3. Client-Initiated Agent Engagements

Client Autonomy: If a client contacts a new agent directly, this will be interpreted as a preference for new representation, regardless of any previous engagements.

Handling Transfers: The new agent must immediately log this interaction in the system, indicating that the client approached them voluntarily.

Avoiding Conflicts: Agents must not solicit clients already working with a colleague. However, if the client reaches out on their own accord, the new agent will rightfully handle the lead.

4. Compliance with Dubai Land Department (DLD) and RERA Regulations

Adherence to Guidelines: All agents must comply with DLD and RERA rules, including prohibitions on unsolicited communications.

Legal Implications: Any breach of regulatory guidelines will result in disciplinary actions, including potential termination.

Client Data Handling: Maintain confidentiality and transparency, ensuring all practices align with UAE laws on real estate transactions and data protection.

5. Best Practices in Conflict Resolution

Objective Mediation: Management will mediate conflicts based on documented data, avoiding biases and ensuring fair resolution.

Documentation Review: All available CRM records will be reviewed, including leads, call logs, and meeting notes.

Client Feedback Consideration: Where applicable, direct feedback from the client will be considered to validate claims.

6. Additional Conflict Resolution Steps

System Audit: The management reserves the right to audit system entries to verify the authenticity of documented data.

Dispute Resolution Timeline: All conflicts will be resolved within 7 business days, ensuring minimal disruption to business operations.

Training and Awareness: Regular training sessions will be held to educate agents on proper documentation practices and conflict resolution protocols.

7. Final Decision Authority

Management's Discretion: The management's decision on conflict resolution is final and binding.

8. Consequences of Policy Violation

Disciplinary Measures: Non-compliance with these procedures will lead to disciplinary action, including warnings, suspension, or termination based on the severity of the violation.

Impact on Commissions: Agents found violating the policy may also face adjustments to their commission entitlements.

By implementing these detailed steps, the company ensures a transparent, fair, and legally compliant approach to managing conflicts and maintaining a professional real estate environment.

# Attendance Policy

Zubair

​

Coldwell Banker UAE Attendance Policy

Effective Date: February 2025

Applies To: All Sales Agents

At Coldwell Banker UAE, we uphold the highest standards of professionalism, accountability, and commitment. Consistent office attendance is not just a requirement but a fundamental responsibility to ensure productivity, team synergy, and continuous learning.

To reinforce discipline and maximize performance, the following Mandatory Attendance Policy will be strictly implemented:

1. Biometric Attendance Registration & Daily Compliance

All agents must be registered in the biometric attendance system at their respective offices.

Punching in upon arrival and punching out before leaving is mandatory.

Office Timings: All agents must be present at their assigned office by 9:30 AM sharp.

Any agent who fails to punch in will be considered absent for the day, regardless of actual presence.

The Team Coordinator and Manager are responsible for ensuring that all agents in their team are properly registered in the biometric attendance system in a timely manner.

Failure to properly record biometric attendance, including incorrect punch-ins or forgetfulness, will not be accepted as valid reasons. Any missing biometric entry will be considered an absence in accordance with company policy.

2. Absence & Non-Compliance Consequences

If an agent is absent for more than two consecutive days without valid justification, all system accounts, CRM access, and email accounts will be blocked without prior notice.

Unexcused absences or failure to comply will result in immediate actions as follows:

First Offense: Verbal warning from direct manager.

Second Offense: Written warning from HR.

Third Offense: Final warning letter with potential fines.

Further Non-Compliance: Termination of contract due to violation of company policy.

3. Reporting Absences & Exceptions

If there is a valid reason for absence, the agent must update Salesforce Calendar Events and inform their direct manager before the start of the working day.

Absences without proper updates in Salesforce and notification to the manager will be considered unexcused, triggering immediate action.

Any emergency leaves must be supported by valid documentation and approved by management.

4. Late Arrivals & Penalties

Late arrivals past 9:30 AM will be fined.

Chronic tardiness (more than 3 late arrivals in a month) will trigger an HR review and potential disciplinary actions.

All late arrivals and absences will be documented in the agent’s performance file, impacting career growth and incentives.

5. Mandatory Morning Sessions: “The Power Play”

Daily morning training sessions from 9:30 AM to 10:00 AM are a compulsory part of the work schedule.

These sessions will focus on sales techniques, market insights, and business strategies to enhance overall performance.

Non-attendance at these sessions will be considered a performance concern and addressed accordingly.

6. Strict Enforcement & Compliance Monitoring

Regular attendance reports will be submitted to HR for monitoring.

Any discrepancies, patterns of non-compliance, or lack of adherence will result in strict actions without exceptions.

All managers and coordinators are responsible for ensuring their teams fully comply with the policy and report any issues immediately.

Coldwell Banker UAE is committed to fostering a high-performance culture that drives results. Attendance is not just about being present—it’s about being accountable, proactive, and engaged in the company’s success.

Failure to comply with this policy will result in serious consequences. No exceptions will be made.

For any clarifications, please reach out to your direct manager or HR.

# Leaving Office - During Work Hours

Zubair

​

Policy: Logging External Appointments and Activities in Salesforce Calendar

Policy Overview

Effective immediately, all employees must log any external activities, such as meetings, visits, transfers, or appointments conducted during office hours, into Salesforce. This policy ensures transparency, accountability, and efficient tracking of employee activities outside the office premises.

Purpose

The primary objective of this policy is to maintain accurate records of employee schedules and ensure that all external activities are properly documented and linked to relevant accounts and opportunities within Salesforce.

Scope

This policy applies to all employees who leave the office premises during working hours for official purposes.

Policy Details

Mandatory Logging Requirements: All external activities must be logged as a Salesforce Calendar Event before leaving the office. Each event must include:

Title: Clearly specify the activity type (e.g., Meeting, Client Visit, Transfer).

Date and Time: Enter the date, start time, and duration of the event.

Location: Provide the exact location (e.g., address or venue name).

Participants: List the names of individuals you are meeting with or transferring with.

Linked Accounts/Opportunities: Attach the event to the relevant account or opportunity for proper reference.

System Accessibility:

Since all employees have access to Salesforce, there are no exceptions to this requirement. Ensure that the event details are accurate and comprehensive.

Compliance Tracking:

If an employee is found to be outside the office during working hours without a logged event for the corresponding time slot, this will be treated as annual leave or unexcused absence.

The policy will be strictly enforced starting 19-12-2024.

Audit and Review:

Management will periodically audit Salesforce calendars to ensure compliance with this policy. Non-compliance will result in formal action as outlined in company guidelines.

Implementation and Enforcement

Effective Date: 19-12-2024

Compliance Start: All employees must fully comply with this policy by the effective date.

Support and Queries

For any questions or assistance with Salesforce Calendar usage, please contact the IT department or refer to the training resources available on the policies portal.

# Token Collection - New Launches

Zubair

​

Token Collection Support & Payment Policy for New Project Launches

1. Purpose

This policy outlines the procedure and payment structure related to company-assisted token collection during project launches. It ensures consistency, financial clarity, and accountability in managing token queuing operations on behalf of sales teams.

2. Scope

This policy applies to all sales agents, team managers, and token collection resources engaged during any new launch event where the company provides support to acquire tokens on behalf of agents.

3. Policy Details

3.1. Queuing & Token Request Process

All requests for token collection assistance must be submitted in advance by the respective Team Manager to the Accounts Department.

The Accounts team will evaluate the request and allocate a suitable resource to manage the queue and collect tokens at the launch site.

3.2. Post-Launch Confirmation & Verification

After the launch event, each Team Manager must confirm the following to the Accounts Department:

The total number of tokens collected

The number of successful deals closed

Simultaneously, the token collector must send an individual email to Accounts confirming:

The number of tokens distributed

The agent names and their corresponding teams

This double-verification process ensures transparency and accurate reconciliation.

3.3. Payment Structure

For Successful Deals:

AED 2,000 per token will be paid.

This is split between:

AED 1,000 covered by the company

AED 1,000 deducted from the agent’s commission

For Unsuccessful Deals:

The company will cover AED 500 per token as a service fee to the collector.

3.4. Payment Release Terms

All payments to token collectors will only be processed after successful commission collection from the developer.

The Accounts Department will manage the full disbursement.

The agent’s share (where applicable) will be automatically deducted—agents are not required to handle any direct payment.

4. Compliance

Failure to adhere to this policy may result in:

Delayed or forfeited reimbursement

Denial of future token collection support

Internal review of team-level practices

5. Policy Review

This policy is subject to periodic review by the Accounts and Operations Departments to ensure continued relevance and operational efficiency.

# IT Policies

Zubair

​

Coldwell Banker UAE IT Policy

Introduction

In an era where technology is the backbone of business operations, maintaining a secure and efficient IT environment is crucial. This policy defines the expectations and responsibilities for using Coldwell Banker UAE's IT resources, ensuring compliance, protecting sensitive data, and enabling employees to thrive in a digitally interconnected workplace. By adhering to these guidelines, we collectively safeguard the integrity and resilience of our operations in the face of evolving cyber threats.

Governance and Compliance

The IT department is committed to safeguarding the confidentiality, integrity, and availability of the organization's digital assets. This includes deploying robust security controls, conducting regular system audits, and ensuring alignment with regulatory frameworks and industry standards.

Employees share the responsibility to protect their access credentials, report anomalies or breaches promptly, and adhere strictly to the established protocols. Any violations, whether due to negligence or malicious intent, compromise organizational security and will result in disciplinary actions, including termination and legal proceedings.

Hacking and Unauthorized Access

Engaging in hacking or attempting unauthorized access to any digital resource, infrastructure, or confidential data is a criminal offense and violates this policy. Such actions, regardless of intent or scale, are punishable by law.

Employees found guilty of unauthorized activities will face immediate termination and legal prosecution. These measures reflect the organization's zero-tolerance stance on security breaches that endanger its operations or reputation.

Acceptable Use of IT Resources

All IT resources, including devices, networks, and applications, are designated exclusively for business purposes. Activities such as personal downloads, gaming, or accessing unauthorized platforms are strictly prohibited. Official communications must occur through company-provided email accounts or approved channels to maintain security and professionalism.

Misuse of IT resources, including sending bulk emails, operating unauthorized SMTP servers, or engaging in activities that could harm the organization's digital infrastructure, will result in corrective actions and potential termination.

Device and Asset Management

Employees are accountable for the maintenance and security of any devices issued by the company. These devices must be surrendered to the IT department in good working condition upon an employee's exit.

Reconfiguring, relocating, or altering any company resource without explicit IT authorization is strictly forbidden. Similarly, connecting personal devices to the company infrastructure without prior approval is not allowed. The use of hacking tools, penetration-testing devices, or other unauthorized equipment poses a significant risk to cybersecurity and is strictly prohibited under all circumstances. Violations will result in immediate termination and potential legal action.

Network and Data Security

To ensure a secure network environment, employees must access company systems only via authorized and secure networks. Public Wi-Fi or untrusted connections are not permitted. All work-related data must be stored on approved platforms such as OneDrive, with employees required to perform regular backups and verify data integrity.

Sharing sensitive information through unauthorized platforms is prohibited. Non-compliance with these guidelines may result in access restrictions, disciplinary actions, or legal consequences.

Prohibited Tools and Activities

The use of hacking tools or any equipment intended for penetration testing, whether for ethical or unauthorized purposes, is strictly banned. Additionally, using the company's internet or network for personal activities unrelated to work violates this policy and will lead to disciplinary actions.

Email and Communication Protocols

To protect the organization’s domain reputation and prevent unauthorized data dissemination, employees must refrain from:

Sending bulk, spam, or marketing emails through business accounts.

Setting up SMTP servers or similar tools without IT approval.

Any violation of these protocols will result in immediate corrective actions to mitigate risks.

Data Backup and Responsibility

Each employee is responsible for ensuring the integrity and security of their work-related data. All company data must be backed up to OneDrive for Business, and employees must regularly verify the completeness of these backups. The IT department will not be held liable for data loss due to failure to adhere to this protocol.

IT Support and Incident Reporting

Employees must log all IT-related issues through the official ticketing system to ensure proper tracking and resolution. Critical incidents, such as system outages or potential data breaches, should be flagged with high priority. Direct or informal support requests will not be entertained.

Monitoring and Privacy

To enforce compliance and maintain security, the IT department monitors network and system usage. Monitoring activities are conducted transparently and respect employee privacy within the boundaries of company-approved operations.

Physical and Digital Security

Employees are required to lock devices when unattended and ensure sensitive materials are securely stored. In the event of device theft or loss, the incident must be reported immediately to IT for appropriate action, such as remote data wiping or device locking, to safeguard confidential information.

Consequences of Non-Compliance

Failure to adhere to this IT policy will result in significant consequences, including:

Immediate termination of employment for serious violations, such as hacking or unauthorized access.

Legal proceedings in cases involving malicious intent or significant breaches.

Restricted access, penalties, or other disciplinary actions for neglecting IT responsibilities.

By adhering to this policy, employees help create a secure, compliant, and efficient IT environment that benefits everyone. Non-compliance jeopardizes not only individual roles but also the integrity and reputation of the organization.

User Responsibility for Account Security

All employees are responsible for maintaining the security and integrity of their assigned digital identities and access credentials. In the event of any cybersecurity incident arising from user-level negligence—including but not limited to:

Sharing passwords or access tokens

Falling victim to phishing, social engineering, or fake login pages

Failing to secure their devices against unauthorized access

Clicking on suspicious links or downloading malicious content

Circumventing security protocols or disabling protective software

The Company and the IT Department shall not be held liable for any direct or indirect financial loss, data breach, or operational disruption that may occur as a result. Furthermore, any such incident will be recorded as a violation of the IT policy, and may be subject to internal disciplinary action based on the severity and impact.

Employees are expected to:

Enable and consistently use Multi-Factor Authentication (MFA)

Keep all software and operating systems updated

Use Antivirus and Antimalware Sofware where needed.

Avoid sharing credentials under any circumstances

Report any suspicious or unauthorized activity to the IT Department immediately

Policy Updates and Acknowledgment

This policy is reviewed annually to address technological advancements and emerging cybersecurity threats. All employees must acknowledge their understanding and agreement to comply with these guidelines, recognizing their role in maintaining a secure and productive workplace.

Coldwell Banker UAE is dedicated to fostering a secure, innovative, and collaborative workspace. By adhering to this IT policy, employees contribute to safeguarding the organization's digital infrastructure, ensuring operational excellence, and strengthening its reputation. Together, we can navigate the challenges of the digital age with vigilance and responsibility.

# LISTING POLICY

Zubair

​

FORM A is Mandatory:

It is mandatory to have FORM A signed by the seller in order to list their property. This is a strict policy enforced by RERA. If a client is unwilling to cooperate, the agent can share the circular explaining that this is not our requirement, but an official requirement by RERA. FORM A can be generated through the Dubai Rest App.

Price Range:

The agent is not authorized to change the price in the listing. If there is a price change, the price must be amended in FORM A, and the updated form must be signed by the seller/landlord.

NOC instead of Form A:

Some agents are submitting an NOC as a confirmation to list the property as the Seller doesn't want to sign Form A. This is not acceptable. For any listing of an individual owner, NOC will not be accepted, and they need to have a Form A signed. NOC can only be allowed for Developer's listings. NOC from Developer will only be accepted if the agreement with the Developer is valid.

Period of Expiry on Form A:

The Form A can have a maximum validity period of 1 year. During this period, as specified in the Form A, the agent is allowed to list the property. After the expiry of this period, a new Form A must be submitted. Additionally, every listing form should include an expiry period and cannot be open-dated. Please note that some portals do not accept Form A with a validity of more than 6 months; even if the form is still valid, these portals may take the listings offline.

For rental listings, owners not willing to sign or share documents with signature:

It is mandatory to obtain some ID proof which has their signature to proceed with publishing their listing.

POA of POA:

The direct POA of the Seller can sign the Form A but the POA of a POA cannot sign it.

Draft of:

A) Fresh/New listing: If "Agent A" creates a DRAFT of a fresh listing without sufficient documents, he/she can work on the particular listing but if "Agent B" is able to get all documents of that particular listing along with the FORM A (signed by actual owner) then the listing will belong to "Agent B" and the listing will be transferred on the CRM from "Agent A' to "Agent B" without any notification.

B) Expired listing: If "Agent A" has a published listing that’s expiring soon or has expired, the agent needs to extend the Form A validity. If the Form A for a previously published listing, is signed by a new agent after the expiry, the listing will belong to the new agent.

Priority to internal source:

If any agent has an inquiry of a Seller/Landlord or Buyer/Tenant they have to FIRST check within the company and see if they are able to close the transaction within the company. Agent is allowed to deal with outside agents only if they were not able to meet the inquiry of their client within the company. This will be strictly monitored, and the commission will be blocked if the agent failed to enquire internally and decided to close with external agent.

List before Action:

The company will only recognize agents with a valid Form A for the commission share.

False Information on listing:

The information mentioned on the published listing should match the information mentioned on the Form A/Listing form and Title Deed. If any agent tries to create a listing with false information they will be penalized financially. For instance, an Agent might add special characters ("," or "." etc) to list a unit because the unit is actually listed by another agent. Even if agent wishes to EDIT an existing listing, they cannot change/manipulate the information for the sake of listing a unit as per their convenience. The information should not be different than the listing form/Title Deed (price, unit #, build area, number of bedrooms etc) for editing any existing listing. Refer to Code of Ethics.

It is mandatory to mention correct information on the listing form including correct name of the Seller/Landlord as per Title deed, correct contact number of the Seller/Landlord. Any wrong or false information on the listing form will lead to strict action against the agent

Commercial Listings of Individual owners:

Most of the commercial buildings (retails and office spaces) might have a single owner for which they provide an NOC for the whole building instead of Listing Form for a particular unit. Therefore, if any agent has an inquiry for commercial properties, it should be directed to commercial team. If an agent wishes to check the availability of a commercial property, they should enter the name of the building so that the system can notify them on which commercial agent (if any) is working on that building. If there is no listing of a particular building in the system, then the agent may contact the landlord directly and proceed with transaction.

Golden Rule: Anyone with Form A/valid leasing form supersedes all scenarios.

# LISTING GUIDELINES

Zubair

​

It is very important to maintain the quality of listings on all the portals in order to get more attention from the clients. Below are few tips which are useful in order to achieve maximum quality in your listings:

Listing Title

Title of any listing is the most prominent text that features at the top of the listing. Be sure to mention key attributes, such as ‘price reduction’, ‘sea view’, ‘fully upgraded’ to attract quality leads.

Keep in mind that your listing title can be between 30 and 50 characters maximum. Use this space wisely to really capture the property seekers. To ensure you get maximum Quality Score points for your title, stay within the character range.

Listing Price

The price mentioned on the listing should always match the price mentioned on the Form A / Listing Form approved by the Seller / Landlord.

According to RERA it is considered as Legal offence if the price on the listing is not matching with the price on the document, otherwise you will be liable to face any consequences including the penalty from RERA which can go up to AED 50,000 or higher.

Listing Description

Around 50% of visitors click ‘read more’ on the property details page. This offers a huge opportunity for you to ‘sell’ your listing to browsers by providing a detailed description of the property, noting all essential and stand-out features. For commercial listings, specify the necessary trade license relevant to the property’s location. For instance, a property located in JLT requires a DMCC License.

Your Listing Description may range from 1000 to 2,000 characters. A strong description will also make your listing more discoverable to the user as the keyword search feature for most of the portals pulls from this section. Be sure to mention unique attributes such as the view, private swimming pool, fully landscaped garden, or proximity to key amenities, such as schools or supermarkets. To earn full Quality Score points, ensure you stay within the range.

Responsibilities of Listing Agent

Listing agent is responsible to maintain the below checklist once received from the Landlord/Seller and provide the “Key receipt” of the same to the Landlord/Seller with his/her signature and upload the scanned copy of the receipt on Salesforce (CRM).

The agent is completely responsible for maintaining the property in proper condition. The property including any facilities of the building / unit / community cannot be used for any personal use at any circumstances. Strict action will be taken against an agent if the property is misused in any manner.

The keys of the property at all times should be with the listing agent and cannot be given to anyone else to access to property (not even security staff). The agent should not leave the unit open at any circumstances and should be physically present for all viewings.

Listing Images

You must have heard of a saying that “a picture speaks a thousand words”. With that in mind, uploading high-quality images with your listing is hugely powerful. Approximately 70% of property seekers interact with images when they reach the property detail page. On top of that, Property Finder analysis shows that listings with high-quality images yield on average 30% more clicks and 50% more leads – so, your images are a chance for your listing to shine and stand out from the crowd!

The elements which a portal considers when it comes to quality are orientation, brightness, uniqueness and resolution.

Image orientation

Landscape photos, please! Use the space in the search results and property listing page to its maximum potential. We all know prime real estate is expensive, so why waste space!?

Image brightness

Make sure your images feature ample natural light to showcase the property the best way possible. Shoot during the day and invest in professional equipment – it pays off, we promise!

Image uniqueness

Upload unique content to promote your listing. Duplicate images don’t provide a good user experience. Most of the portals have measures in place to identify duplicate or spam content.

Image resolution

Providing high-resolution, clear images supports the consumer experience and showcases your listings in the best way. No one likes pixelated, blurry photos! Use high-resolution images, ideally with a 4:3 aspect ratio (e.g.,1600\*1200 pixels)

Photo Arrangement Policy

To ensure consistent presentation across all our property listings and to maximize engagement on portals such as Property Finder and Bayut, all listings must follow the standardized photo arrangement outlined below. High-quality, well-ordered images significantly increase visibility, buyer interest, and lead conversion.

Required Photo Order & Guidelines:

A. Hero Shot (Exterior or Top Feature)

Must be visually striking and inviting

Can be the front elevation, pool, high-ceiling space, or a premium view

This will serve as the cover image—make it scroll-stopping

B. Living Room

Should appear spacious, bright, and welcoming

Include staging when possible to help buyers visualize the space

Capture the best angle showing layout and light

C. Dining Area

Neat and well-lit, ideally showing its connection to the kitchen or living area

A simple, clean setup is recommended

D. Balcony or View

Include if the property features a balcony, terrace, or notable view

Shoot during optimal lighting (e.g., golden hour) to enhance impact

E. Master Bedroom

Must look clean, restful, and private

Show symmetry and include natural light wherever possible

F. Other Bedrooms

Show at least one image per additional bedroom

Keep decor minimal and highlight space versatility (guest room, office, kids’ room)

G. Kitchen

Highlight appliances and storage space

Ensure countertops are clear and lighting is even

H. Backyard / Garden / Landscape

Include if applicable

Show usable outdoor space, landscaping, or seating areas

I. Amenities (Pool, Gym, Lobby, etc.)

Optional, but must be relevant and well-maintained

Focus on standout features like infinity pools, kids’ areas, or premium lobbies

J. Master Bathroom (Closed Toilet)

Show entire layout (vanity, tub, shower) with toilet lid always closed

Emphasize cleanliness and high-end finishes

K. Additional Bathrooms (Optional)

Include only if they add value to the listing

Follow the same cleanliness and presentation standards

L. Floor Plan (If Available)

Highly recommended for off-plan units and large properties

Must be clear and professionally rendered.

Note:

• Avoid repeating angles or uploading blurry, poorly lit photos.

• Maintain logical flow, as if guiding the buyer through the home.

• All photos must be high resolution and taken during the day with natural lighting wherever possible.

Watermark

Always watermark your images to protect content from being recycled by another, less sophisticated brokerage.

Listing location

Location, location, location! Your customers are more informed than ever before. Select all four (or more depending on the portal) sections within the location tree to ensure your listing always appears in the search results, irrespective of what filters are chosen. You’ll instantly boost the visibility of the listing as it will appear in more searches. See below the best examples of how to add the location.

Dubai, Greens, Onyx Towers, Tower 1

Dubai, Dubai Marina, Silverene Tower, Tower A

Verify your listings

Getting your green “Verified” badge is the simplest way of increasing your visibility, attracting more clicks and leads as property seekers know your listing is genuinely available.

To verify your listing, you will need to provide us with certain documents to prove its authenticity. Your team coordinator will check and approve each document submitted, helping you to the top of the search rankings.

Get 100% Quality Score

Following the above tips will unlock your listing’s full potential. What does that mean? High-quality listings rank higher, simple. Appearing higher in search gets you more visibility, more page views, more enquiries, and as a result, more deals. The higher the Quality Score, the more chances you have that YOUR listing will show up in search.

Promote your listing

Finally, we have the tools that help boost your listing even further. Premium listings get you over 10x more leads and Featured listings generate over 5x more views. It’s worth exploring and investing in these products if you want to enhance your visibility and exposure. However, this is subject to manager approval and the availability of credits.

# LISTING ON SALESFORCE

Zubair

​

Listing Creation and Submission Process on Salesforce

Listing Creation on Salesforce: Agents must draft each property listing on Salesforce, ensuring that all relevant details about the unit, including its price, are accurately entered.

Required Documents: The following documents must be uploaded to Salesforce for listing publication and authenticity verification:

Title Deed/Property Ownership Documents

Client Screening report (for all sale listings and all rental listings above AED 1 mil)

Form A/Leasing Form

Owner ID/Passport

Trade License (if owned by Company)

In case of POA, copy of POA and ID/passport of POA

Submission for Approval: Once the listing is complete and all required documents are uploaded, the agent must submit the listing to the manager on Salesforce for approval.

Listing Approval & Publishing

The Manager will review the listing for accuracy and compliance.

After approval, the coordinator will verify that the listing is accurate, compliant, and visible on various platforms.

All property listings must be submitted to the Team Manager for final approval.

Only Managers are authorized to approve and publish listings on Salesforce.

Coordinators must notify the respective Manager once a listing is ready for review.

It is the responsibility of the Coordinator to follow up regularly until the listing is approved and published.

In case the Manager is unavailable, a dual approval from the Coordinator and the CRM Listing QA agent is required to publish the listing.

No listing should remain pending due to lack of follow-up.

Agents Role in Managing Listings

Draft the listing

Upload all the documents on the listing on Salesforce

Book photoshoot through www.mycbVerse.com

Visit the property to get the Trucheck badge for the listing (for eligible properties)

Coordinators Role in Managing Listings

The coordinator is responsible for ensuring property listings are accurate, compliant, and visible.

KEY TASK INCLUDED

Review Details: Match listing information with documents and verify accuracy of pricing and features.

Quality Assurance: Ensure listings have clear descriptions, high-quality images, and comply with guidelines.

Seller Screening: Coordinators will conduct the screening for sellers once all required documents have been uploaded by the agents. If the screening is approved, it should be downloaded from the RegsWatch website and then uploaded to Sales force by coordinators.

Trakheesi Permits: Obtain and verify permits before listing goes live.

Process Management: Upload listing docs to portals for verification to achieve ‘Verified’ badge on portals.

Quality Score: Strive for a 100% Quality Score to enhance visibility and engagement.

Listing Updates: Regularly update and correct listings as needed.

Agent Support: Provide ongoing assistance and resolve portal issues.

Promotion: Use Premium and Featured listings for increased visibility, subject to managers’ approval and credits availability.

Publication Time frame: Published listings generally reflect on portals within 2 hours.

Policy for Coordinators – Listing Verification and Publishing

To ensure the accuracy, accountability, and integrity of all property listings before they are published online and to establish clear procedures for listing modifications.

Scope:

This policy applies to all back-office administrators, coordinators, and sales agents responsible for creating, verifying, and publishing property listings on the system.

1. Listing Verification and Approval

All listings created by back-office admins must be verified by the respective sales agent before being published online.

The coordinator must send the Salesforce property listing link to the assigned sales agent via WhatsApp or email for review.

The agent must confirm that all details are accurate before publication.

Once verified, the agent’s approval must be documented by attaching a screenshot of the confirmation to the listing documents in the system.

Final step would be to Notify the Team Manager and get the listings published on Salesforce.

2. Restrictions on Listing Changes

Once a listing is published, no changes will be made unless a New Form A is submitted with the requested changes clearly stated.

Alternatively, an email approval from the manager must be uploaded to the listing documents, clearly mentioning a valid reason for the requested modification.

Coordinators and admins are strictly prohibited from making any unauthorized changes to listings without valid documentation or management approval.

Under no circumstances should an existing listing be deleted and recreated as a new one. The only exception to this rule is when there is a significant price change, and the agent provides documented proof justifying the change. All such cases must be approved by the Managment before action is taken.

3. Exemptions

If a sales agent has created the listing themselves and is submitting it for approval, the initial verification process by the agent is not required. But the agent needs to notify the coordinator to get it published, which will follow the normal procedures and checks.

Minor edits such as formatting corrections or typo fixes may be allowed, provided they do not alter the core details of the listing.

4. Compliance and Accountability

Failure to comply with this policy will result in disciplinary action, including but not limited to:

Official warnings

Temporary suspension of system access

Escalation to senior management for further corrective action.

The integrity of listings is a priority, and any unauthorized modifications may be considered a breach of company policy.

# Portal KPI's

Zubair

​

Property Portal policies and KPI's - Applies to All Sales Teams: To maintain high listing quality, effective credit utilization, and overall platform performance, the following Key Performance Indicators (KPIs) must be met each month. Failure to meet these targets will result in credit restrictions for the following month.

PropertyFinder Listing & Credit Allocation Policy

1. Performance-Based Credit Allocation Policy

Credits for PropertyFinder will only be allocated to agents who meet the following KPI benchmarks:

Propertyfinder KPIs

Listing Quality 98%

Verified Listings 90%

Agent Verification 100%

Super Agents 75%

Call Response 75%

WA Answer Rate 80%

Credit utilization at the end of the monthly cycle 100%

Agents who fail to meet these KPIs in a given month will not receive credit allocations for the following month.

Managers and coordinators are responsible for tracking performance and ensuring compliance.

2. Premium & Featured Listings Policy

Only agents with a "SuperAgent" or “TruBroker” badge are eligible for Premium/ Featured or Signature listings.

For a listing to be elevated above standard category, it must meet the following criteria: (Best Price is Mandatory for all)

Best Price: The listing should be priced competitively compared to market trends. ( Comparison to be done with previous transactions and active market prices, 5% Margin acceptable based on recent transactions)

Exclusivity: The listing must be exclusive to the agent or brokerage.

Unique Selling Proposition (USP): The property should have a clear competitive edge (e.g., unique features, superior amenities, or an exclusive location advantage).

Listings that do not meet these criteria will not be granted elevated status on any portals.

3. Listing Performance & Repricing Rules

Listing Age | Action Required

3+ months not transacted | Must be repriced before continuing the listing.

6+ months not transacted | Will be removed from the portal.

Agents must proactively suggest price adjustments to reflect market conditions for properties that remain unsold beyond three months.

Listings that remain on the portal for over six months without a transaction will be permanently removed.

4. Strict Prohibition on Relisting & Deletion of Properties

Relisting or deleting properties solely to reset the listing age is strictly prohibited.

Relisting is only permitted in cases of a significant price reduction that is likely to improve the chances of a sale.

Relisting Approval Process:

- Written undertaking: agent will close within two weeks.

- Written manager approval via email.

If not sold in two weeks, no further relisting requests will be entertained from that agent in the future.

Bayut Listing & Credit Allocation Policy

1. Performance-Based Credit Allocation Policy

Credits for Bayut will only be allocated to agents who meet the following KPI benchmarks:

Bayut KPIs

Truchecks 70%

Checked Listings 90%

Agent Profile Completion 100%

TruBrokers 75%

Call Response 75%

WA Answer Rate 80%

Credit utilization at the end of the monthly cycle 100%

2. Signature Listings Eligibility

Only agents with "TruBroker" status are eligible for Signature Listings.

Criteria:

- Exclusivity

- Best Price

- Unique Selling Proposition (USP)

3. Listing Performance & Repricing Rules

Listing Age | Action Required

3+ months not transacted | Must be repriced to remain listed.

6+ months not transacted | Will be removed from Bayut.

4. Strict Prohibition on Relisting & Deletion of Properties

Same constraints as above; significant price change required + approvals.

IMPORTANT: Violations lead to disciplinary action, including credit restrictions or removal of listing privileges.

# LEAD POLICY

Zubair

​

Respond to Leads:

- Respond to any company leads within 2 hours of receiving them.

- Update "Lead Status" + "Lead Sub-status" in Salesforce with valid note.

- If a lead is not updated within 4 hours, it will be reassigned unless status is Working (max 3 days before convert to opportunity).

- Optional buffer (e.g., 24h) may be applied at management discretion only.

Enter Leads into CRM:

- Immediately add/update all lead info into Salesforce.

- Check Salesforce for related listings and contact the internal listing agent first.

Update Lead Status:

- Agents must keep lead status updated (not coordinators). Unqualified leads: mark with reason.

- If you mark "Unreachable", it will be reassigned; use "Working" + "Called No Reply" if you intend to keep trying.

Manage Lead Status:

- "NEW" → move to "Working", "Unreachable", "Unqualified", or "Opportunity".

- "Working" ≤ 3 days, otherwise reassign.

Monitor Lead Progress:

- Leads left "Working" without notes for ~1 month may be reassigned.

Handle Opportunities:

- Contact each opportunity at least once every 2 weeks; may remain with agent up to 4 weeks (extendable by manager). Close-won or close-lost accordingly. No update for >4 weeks → reassign.

Use Salesforce Dialer:

- Use SF Dialer for all company leads; avoid personal phones.

Duplicate Leads:

- Mark duplicates as Unqualified → Duplicate, or they may still be reassigned.

# LEAD HANDLING

Zubair

​

When a lead arrives:

- Notification via Salesforce.

- Call through SF Dialer only; update details, status/sub-status + notes within 2 hours.

- Log all meetings/calls/viewings as Calendar EVENTS with correct type (affects KPI).

Resale safeguard:

- Fill a Viewing Form to secure position pre-viewing.

Buyer Screening:

- Coordinator runs buyer screening; if success → agent creates Form B via Dubai Rest App; if fail → coordinate with compliance officer.

- For progressing deals: upload buyer & seller screenings via RegsWatch on Salesforce.

- Conveyance assists with finalization.

# OPPORTUNITY HANDLING

Zubair

​

Key Guidelines:

1) Lead Conversion — ensure proper Contact/Account linkage; carry over Lead Source; copy notes.

2) Creation — set required fields; link Contact Roles; avoid duplicate Accounts.

3) Progress — keep Stage accurate; maintain contact engagement.

4) Activity — log all calls via SF Dialer; schedule follow-ups; add meeting notes.

5) Status Updates — weekly notes; 3 weeks no action → may reassign; 6 weeks no progress → eligible for reassignment.

6) Closure — if won, attach docs and set Closed-Won; if lost, set Closed-Lost + reason.

7) Clean CRM — avoid duplicates; keep data complete and professional.

8) Alerts — calendar reminders for follow-ups.

9) Collaboration — @mention, use Chatter.

# BOOKING SUBMISSION

Zubair

​

Purpose: timely, accurate, compliant (RERA) submission across transaction types.

Off Plan:

- Provide fully signed OTP/Booking/SPA; buyer ID docs.

- Email to Coordinator within 3 days of signing.

- Non-compliance: 15% deduction from agent commission.

Secondary (MOU/Form F via Dubai REST only):

- Agent prepares A/B/F; Conveyancing joins after Form F signed.

- Handover all docs + deposit cheques to Conveyancing within 24 hours of Form F.

- Conveyancing fees acknowledged in Form F.

- No conveyancing charged (manager’s approval only) → inform coordinator within 3 days; miss → 15% fine.

- Late submissions → commission not processed / penalties.

Rental:

- Once signed, create Deal in Salesforce; upload docs; notify Accounts within 3–5 days.

- Non-compliance: 15% deduction.

Highlights table (summary in policy).

# DEAL DOCUMENTS

Zubair

​

Mandatory: inform coordinator within 2 days from signing any deal documents to update CRM and issue TAX invoice.

KYC:

- Required before/with Form F; clause in F if delayed.

- No transfer without KYC. Buyer/seller KYC as applicable (who pays commission).

- Not required for outside agent’s own clients for their side.

Secondary (Individual):

- Buyer/Seller screening uploaded before forms signed.

- Signed Form F; IDs; POA docs if any; title deeds; receipts; security deposit ack; KYC; risk assessment; 5% VAT.

Sale – Company:

- Signed Form F; IDs; trade licenses; TRN; fee proof; receipts; deeds; deposit ack; KYC; risk; 5% VAT.

Off-Plan:

- OTP/Reservation/SPA; buyer docs; fee proof; KYC; risk.

Rental:

- Tenancy contract; tenant & landlord docs; POA (if any); title deed/Oqoodi; 5% VAT.

Third Party / Outside Broker:

- Undertaking letters; trade license + stamp; passport/signature; agent-to-agent agreements; RERA docs; receipts/invoices, etc.

VAT:

- 5% VAT on all commissions; agent pays if not collected.

# TRANSACTION CLOSING

Zubair

​

Cut-off Date: submit TCR by 24th of each month.

Offer Acceptance: signed before down payment.

Cheque: down payment (10%) in seller’s name or escrow (Mega Homes Real Estate Brokers L.L.C.) until transfer.

Form F/SPA: signed by both parties.

Docs: Coordinators upload to CRM.

Receipts: issued by coordinators/Finance only.

Tenancy: prepared by coordinator; agent collects signatures with date, then hands to coordinator.

# COMMISSION STRUCTURE

Zubair

​

Add 5% VAT on agency fees; agent liable if not collected.

Residential:

- Buyers 2% (min AED 5,000)

- Sellers 2% (mandatory)

- Tenants 5% (min AED 3,000)

- Landlords 5% (optional, manager approval)

Commercial:

- Buyers 2% (min AED 5,000)

- Sellers 2% (optional, manager approval)

- Tenants (Office) 7% (min 5,000) for 1yr; 10% (>1yr)

- Tenants (Retail) 10% (min 5,000) for 1yr

- Landlords 5% (min 5,000, optional)

Buyer/Seller sides: split equally by sides unless agreed otherwise (in writing).

Referrals:

- Referring agent eligible for 25% of one side only (not total), paid after deal completion; valid up to 6 months from referral date; not for renewals; process via CRM/email only. After referral, referring agent steps back for 3 months.

Outside Broker:

- Work only with registered (RERA) brokers.

- External promises to non-RERA freelancers are from agent’s share (company not liable).

- Mandatory docs: A2A agreement, RERA ID/cert, Trade License, receipts/cheques, invoices.

# CONVEYANCE ROLE

Zubair

​

1) After Form F signed + fee charged → handover to Conveyancing. Send docs (IDs, title, pre-approvals, floor plan). Deposit cheques to Onyx Conveyancing team.

2) Comms — Conveyancing coordinates among parties; keeps all updated.

3) Developers/Banks — NOCs, service charges; agent attends valuation if mortgage.

4) Transfer Prep — outline cheques (manager’s, card, cash), collect/monitor docs validity.

5) Transfer — trustee appointment; oversee handover; return deposits; pay charges/refunds; acknowledgments; KYC complete.

# Payment Follow Up

Zubair

​

Objective: secure, compliant payment communications per UAE Central Bank / RERA / AML.

Policy:

- No agents follow-up directly with clients on payments post-deal. Accounts handles all payment instructions and reminders via official email.

- Agents must not share bank details/payment links.

- For updates, agents contact Accounts internally.

- Violations can trigger regulatory penalties and internal action.

Enforcement: warnings → suspension → potential termination.

Roles: Agents disengage; Accounts leads; Managers monitor.

# CODE OF ETHICS

Zubair

​

- No data manipulation in CRM; accurate client/listing info only.

- No false signatures; verify against ID signatures.

- Transparency: disclose any compensation/benefits/gifts.

- Revenue: record all revenue; rentals renewals included.

- External comms: agents liable for emails/social media/calls without approval.

- Company data: database is company property; do not rent/sell.

- Company may take disciplinary/legal action for breaches.

# REFERRAL - PROPERTY MANAGEMENT

Zubair

​

Referral: 25% of PM fee (first year only), min AED 1,000 (Silver) / AED 2,000 (Gold).

Packages:

- Silver: 3% annual rent (min 3,000)

- Gold: 5% annual rent (min 5,000)

Examples (first year):

- Rent 60,000 → Silver fee 3,000 → agent commission 1,000; Gold fee 5,000 → agent commission 2,000.

- Rent 165,000 → Silver fee 4,950 → agent 1,237.50; Gold fee 8,250 → agent 2,062.50.

Process: explain package; share landlord details with PM team. Pay after client signs and pays. No renewal referral eligibility.

# Commission Advance Policy

Zubair

​

1) Advance after receipt (any deal):

- Up to 80% of agent’s commission; remaining 20% in payroll.

- TCR must be fully approved.

2) Advance before receipt (off‑plan only):

- Up to 25% of agent’s commission; SPA signed and invoice issued; eligible per developer policy.

- Balance after company receives full commission (via payroll).

3) Process:

- Written approval from Line Manager.

- Submit to Coordinator → HR & Finance.

4) Notes:

- Subject to Management/Finance approval.

- Not guaranteed until Finance confirms.

- Abuse may remove advance privilege.