

Web Based CRM system in relation to Real estate.

1. Multiple user access with their professional emails and passwords, ability to create/delete users with roles and permissions, e.g Admin, Agent, Manager, and log in remotely from any destinations. Manage User information and activity logs.
2. Add client information into the system, name, number, email, address, with a tick selection below, number of bedrooms (enter number manually), price (enter manually), cash or mortgage, location (enter multiple locations manually with a comma at the end of each location inputted), garage, swimming pool, parking- off- street, on - street, private parking, type of property, House, Villa, Detached House, Semi-detached House, Terraced House, Bungalow, Apartment, Penthouse, Land
 - A) . Edit client information and the ability to select the activity of the client on a drop down menu, e.g Active Buyer, Hot Buyer, On Hold, and then final one is Archive (archive will be a separate selection in the CRM which agents can look into themselves and reach out to these buyers again when they feel the need to or match a property with their criteria).
 - B.) The ability to click power report tab which will find active and archive buyers.
Example. If I have a new property come onto the market 3 bedrooms with swimming pool and I am looking for a cash buyer for £300K. I can select these options and search the CRM to find that particular buyer. (MATCH PROPERTY HAS BEEN CREATED)
3. Auto assign leads according to the agent inputting the client details/ If a lead is provided a lead section in the home page which highlights when a new lead has been assigned to that specific agent. HAS THIS BEEN CREATED ON HOME PAGE?
4. An automatic follow up of 7 days after the note is created. (However able to override the 7 days to input a manual date).
5. Auto Reminder alert on the home page for the follow up date.
6. Main home page at the top to have monthly target for agents e.g a pie chart saying £10k and the colour changes as you hit towards the target with a tick being the final when achieved. (This can be automated with sales progression tab from selecting your property for sale)
 - A. Sales progression journey
 - Offer sent to the seller
 - Offer Accepted
 - Documents received from buyer, this can be a tick, passport, driving licence/I.D, Proof of address, Bank Statement
 - Reservation form completed

- Reservation Fee paid to the seller
- Conveyancers instructed
- Manual notes inputted after this stage for the general follow up of sales progression, once this has been ticked and completed the next stage,
- Exchange Date received to transfer- Once completed click Tick
- Commission invoice sent - (enter commission manual)

This then moves there pie chart target accordingly to there monthly target.

7. On the home page, follow up tasks listed highlighted in a light purple or blue colour, As the follow up is completed a new follow up note and date will be set and this removes the follow up task automatically from the home page.

8. Calendar to input scheduled meetings with reminder pop ups (General Calendar on home page)

9. Chat icon to be able to share documents and messages with other users like a Facebook chat on the bottom right hand side and also showing available/ busy or away

10. Properties for sale in the CRM system and able to create and share PDF brochure with the template of the company, this can be manually downloaded and shared amongst the group.

11. Power report section to filter archived buyers to match them with a certain property e.g number of bedrooms, price, cash or mortgage, swimming pool, garage, parking etc. And anything else which you think could be a good fit for a real estate CRM

12. We are working with property portals and leads come into our email, can these leads be auto assigned into the CRM and pulled from the email inbox automatically?

~~Alternativley Alto is a crm I using with zoopla and On the markot they have an open API integration, is this possible?~~

Technical Requirements

- **Web-Based Application:** Accessible via standard web browsers.
- **Responsive Design:** Compatible with desktops, tablets, and smartphones.
- **Scalability:** Capable of handling growing data and user base.
- **Security:** Ensure data security and privacy with robust authentication and encryption.

Thank you