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Subject:
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To:

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Detailed Description for CRM

We would like to have the following fields:

1. Management CRM

Statistics
1.1- Most viewed properties
1.2- Time management
1.3- Feedback after appointments
1.4- Daily Report of all employees
1.5- Customer historic analysis
1.6- Calendar analysis for individual internal agents
1.7- Follow-up alert for every customer and landlord for updates
1.7.1 - Internal Agent when they view a property, the system should be awaiting for there feedback. If the deal did not happen, then the system should automatically send similar properties. Then the CRM should inform the call centre after 24 hours, to call the client and ask if the options we've send is suitable for them. The system should appear this task on the Daily Report of the call centre so that the management can track easly the follow-ups.

2. Call centre CRM

2.1.- Personal details of the customer:

2.2.- New listing or Reference Number:

2.3.- Search Property:

2.4.- Property Option

2.5.- SMS and E-Mail:

2.6- For the viewing feature it will include:

3. Daily Report CRM

3.1- A. Daily report of the agents

3.2- B.Daily report of the confirmation (o.k)

3.3- C.Daily report of the appointments that are re-scheduled

4. E-mail CRM

4.1- At the end of each day the CRM system should send to the management a brief detail of the date transactions.

5. Website CRM

5.1- Automatic update with the website for availablity of each property.

2. Call centre CRM.

When a Client or Alliance or External Agent calls to our office, our call centre must keep track and detailed history of all phone calls and make sure to keep everyone happy including the management. So all transactions should keep time and date record.

All Internal Agents (agents who work in our agency) should add properties by Reference Number and a Description of the property. This will be useful further to help the CRM system to work more efficiently and to provide clients, internal agents and affiliates with necessary details.

First thing when the call centre receives an inquiry, should choose one of the following 4 options :

1. New client
2. Existing client
3. Referral (from Affiliate)
4. External Agent (Other Real Estate Agent companies)

Following is how we would like to use the choice for New client :

2.1. Personal details of the customer:

1. Name & Surname

2. E-mail address
3. Mobile telephone number

NEXT ->

Once all the details are filled in, then we can click next. By clicking next, the system will send an sms and an email to the new customer:

The message will automatically create new ID customer number and send greeting message.

Example:

“ Dear “NAME/SURNAME’ thank you for registering with our company. Your customer ID:34989292.”

2.2. New listing or Reference Number:

1. New listing
2. Reference Number

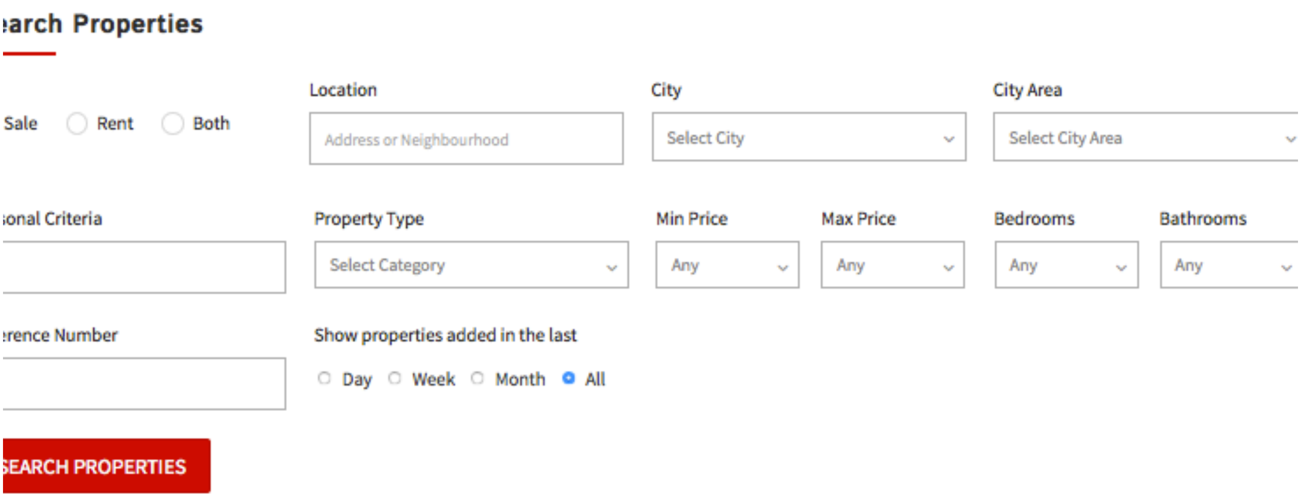
NEXT ->

In the first case 1.New listing, we are going to choose this option by a simple button when the client does not have a specific property that he is interested in.

In the second case 2.Reference Number, will be a field to enter the Reference Number of a specific property so that the Call Centre can view the property straight away and see if this property is available or vacant. Also when this Reference Number shows up, the full details pictures and any other details.

*If the customer is still interested in this particular listing, (see #4) we then press next.

2.3. Search Property:



Here it will be needed to fill in the search form as per request of the customer.

2.4. Property Option

- When the results are found, then we must have the option to choose from the list the properties which interest the client or all the options.

- Then there must go to the next

2.5. SMS and E-Mail:

On this step we would like to have the option to send the selected options by SMS & E-Mail or both to the client.
- Also we would like to have a button to include the internal agent of each property to be informed by SMS & E-Mail that the client with ID:939393 and NAME/SURNAME with there phone number included - in order to contact them and give all necessary details. This will result to a pending action of the internal agent to there Daily Report. (task number 3. as mentioned above)

- SMS stating that the client received an email with few options.
- Alert for Pending for follow-up after 24 hours. Ask the client if he saw the email

*With this feature, the system will send the Internal Agent an sms/email, informing them to contact the customer. In the Daily Report CRM, it will be shown pending till the Internal Agent logs in the CRM and gives feedback of the specific inquiry and then clicks done.

2.6 For the viewing feature it will include:

- Calendar
- Availability of each agent individually
- Time

2.6.1 - Once this is filled out, an SMS and E-Mail will be sent out to the Internal Agent

2.6.2 - Then the Internal Agent needs to confirm the appointment by logging in the CRM on the Daily Report & Calendar.

2.6.3 - The calendar will show all the appointments of the viewings that the agents will show in the month, so there wouldn't be any mistakes done.

We would like a timer in order to check how long the agent follows-up the client and confirms the dates. The statistics will also show us how soon the agents respond.

If the date and time doesn't suit the Internal Agent, then the Internal Agent must arrange it will the customer, and then inform the manager or receptionist of the new date and time so we can edit/save it in the system.

2.6.4 - When an SMS and E-Mail is sent out to the Internal Agent, it will be notifying them with a link that can be accessed easily.

Including the client personal details so that the Internal Agent should call them back and inform them that the appointment is confirmed and also to contact them before meeting to the property.

*ONLY THE AGENT IS RESPONSIBLE FOR THE TIME AND DATE APPOINTMENTS OF THE VIEWINGS.

2.6.5 - When all this is been done, we then confirm to the client with automated SMS and E-Mail that the appointment is confirmed.

*Feedbacks are for the agents stating why they changed the appointments.

- If the appointment is more that 48 hours then the system should send reminder 24 hours earlier day notification inform which will be
- The day of the viewing the system should send an SMS 1 hour before the appointment a reminder to the client and the Internal Agent.

- If the appointment is less than 48 the appointment request, then just an hour before the appointment.