■ Lyns Real Estate CRM

Partner User Guide

Version 1.0 | November 2025

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■ 1. LOGGING IN

Step 1: Open your web browser and go to your CRM URL

Step 2: Enter your **username** and **password** (provided by Admin/Lyndon)

Step 3: Click the **'Login'** button

Note: Keep your login credentials secure and do not share them.

■ 2. DASHBOARD OVERVIEW

After logging in, your dashboard displays:

My Clients	Total number of clients assigned to you
My Listings	Properties available for you to show
My Commission	Your total earnings (10% share)
Client Status	Visual breakdown of client progress

■ 3. MANAGING CLIENTS

What You Can Do:

- View all clients assigned to you by Admin
- See complete client details: Name, contact, budget, property preferences
- Update client status as you progress
- Track communication history

How to Update Client Status:

1. Navigate to **"My Clients"** from the sidebar menu
2. Select the client you want to update from the dropdown
3. Choose the appropriate status from the list
4. Click **"■ Update Status"**
5. Admin receives automatic email notification

Client Status Options:

New Lead	Just assigned to you
Contacted	You've reached out to client
Site Visit Scheduled	Appointment confirmed
Site Visit Done	Property shown to client
Interested	Client likes the property
Negotiation	Discussing price/terms
Deal in Progress	Close to closing
On Hold	Temporarily paused
Not Interested	Client not proceeding

■ 4. VIEWING LISTINGS

What You Can See:

You can view properties assigned to you that are marked **"Visible to Partner"**. Each listing shows:

- Property address and location
- Property type (Apartment, Villa, Office, Warehouse, etc.)
- BHK/Size specifications
- Price and pricing currency
- Total area in square feet
- Furnishing status (for residential)
- **Broker name and contact number** - Use this to schedule site visits
- Amenities and features
- Current listing status

How to Update Listing Status:

1. Go to **"My Listings"** from sidebar
2. Click on a property to expand full details
3. Note the **Broker Contact -** Call them to arrange site visits
4. After showing property, update the status
5. **Important:** When selecting "Shown to Client", choose which client(s) you showed it to
6. Click **"■ Update"**
7. Admin receives notification with client names

Listing Status Options:

Available	Ready to show to clients
Shown to Client	You've presented this property
Client Interested	Client expressed interest
Under Negotiation	Terms being discussed
Not Available	No longer available

■ 5. COMMISSION STRUCTURE

Your Commission Share: 10% of total brokerage
Admin Share: 90% of total brokerage

Example Calculation:
- Brokerage from Owner: ■25,000
- Brokerage from Client: ■25,000
- Total Brokerage: ■50,000
- Number of Brokers: 1
- **Your Commission: ■5,000**
- Admin Share: ■45,000

Note: Admin handles all deal closures and commission calculations. You can view your total commission on the dashboard.

■ 6. EMAIL NOTIFICATIONS

You Will Receive Emails When:

■ Admin assigns a new client to you
- Email includes: Client name, contact number, budget range, property preferences, location

Admin Receives Emails When:

■ You update a client status
■ You mark a listing as "Shown to Client"

All emails come from: Lyns Estate Agency (lynsestateagency@gmail.com)

■ 7. BEST PRACTICES

1. Check Dashboard Daily
- Review new client assignments
- Monitor your commission progress
- Track overall status distribution

2. Update Status Regularly
- Keep Admin informed of all progress
- Update immediately after client interactions
- Use accurate status descriptions

3. Use Broker Contacts Effectively
- Call brokers to schedule site visits
- Coordinate timing with client availability
- Confirm property availability before showing

4. Link Clients to Listings
- When showing a property, always update the listing status
- Select the correct client name(s) in the dropdown
- This helps Admin track which properties were shown to whom

5. Maintain Professionalism
- Respond promptly to new assignments
- Follow up with clients consistently
- Keep accurate records of all interactions

6. Communication
- If you face any issues, contact Admin immediately
- Provide feedback on client preferences
- Report any property concerns

■ 8. FREQUENTLY ASKED QUESTIONS

Q: Can I add new clients?

A: No, only Admin can add clients to the system. New clients will be assigned to you by Admin.

Q: Can I see all listings in the system?

A: You can only see listings that Admin has marked as 'Visible to Partner'. This ensures you focus on relevant properties.

Q: How do I schedule a site visit?

A: Use the Broker Contact number shown in the listing details. Call the broker directly to coordinate the visit.

Q: When do I get paid my commission?

A: Admin closes all deals and handles payment processing. Your commission share will be calculated automatically, and you can track it on your dashboard.

Q: What if a client is not responding?

A: Update the status to 'On Hold' and inform Admin. You can also add notes in the requirements field.

Q: Can I see other partners' clients?

A: No, you can only see clients assigned specifically to you for privacy and efficiency.

Q: What if I have technical issues?

A: Contact Admin (Lyndon) immediately via email or phone. Include screenshots if possible.

Q: Can I change my password?

A: Contact Admin to reset your password. For security, don't share your credentials with anyone.

■ SUPPORT & CONTACT

For any questions, issues, or support:

Email: lynsestateagency@gmail.com
Admin: Lyndon

Response time: Within 24 hours on business days

Thank you for being part of Lyns Real Estate!
Your dedication helps us serve our clients better.