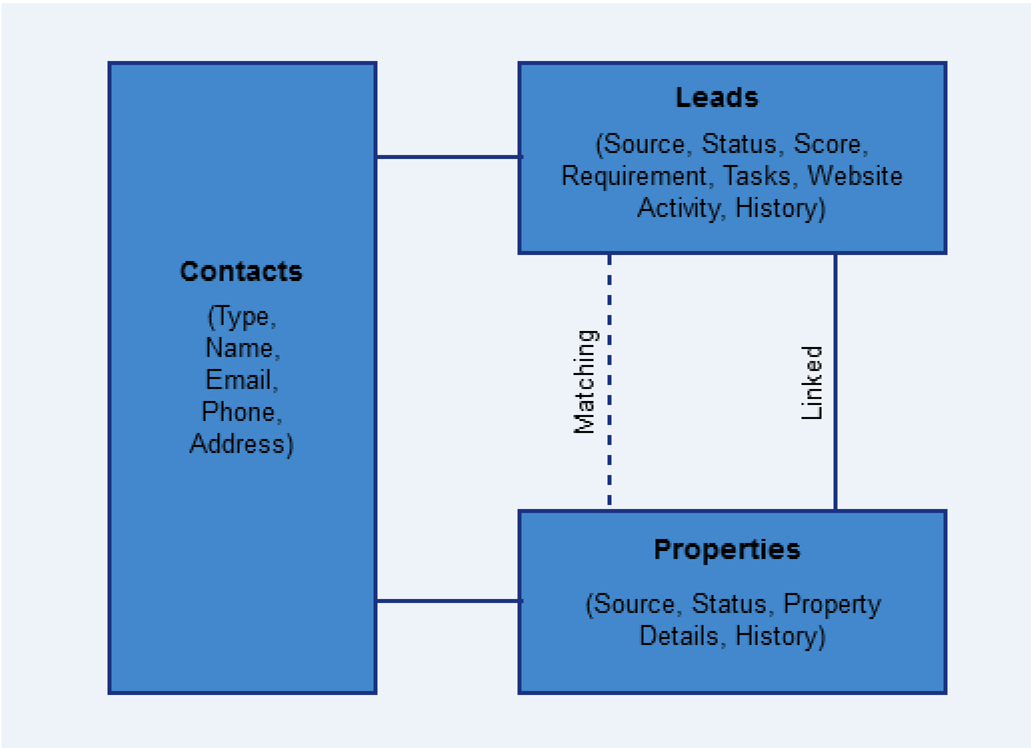
Broker CRM Mobile App Specifications

Track Changes

Date	Change Description
17th July	Task Flow: - Email introduced as New task Type - Comment / Lead Status mapping removed - Pre-fixed comments replaced with current task status Removed Offer facility from Property. Removed Enquiry Date from Lost Leads.
22nd July	Allow 3 properties to be offered in claim Allow long press for options in property Status ‘All’ is changed to ‘All Active’ Back Button behavior in case of Add Property Back Button behavior in case of Mark as Complete Screen refresh after 60 minutes (lead expire time) No Internet connection message Help text icon / alert for Matching properties Data moved from Sub Header to Header (Design)
23rd July	2 new Dead reasons not to be displayed to Broker (for internal logic)

System Structure

Single client may now reside as multiple leads / contacts with multiple brokers.



Claim Lead

The main screen for Claim Lead shows any new leads broadcasted to this agent.
Leads will be removed from claim screen once they are 24 hrs old - since their time of being offered to the broker. (Keep this display claim lead period field as configurable)

The header also shows the number of leads available for claim.

Leads are shown in 3 collapsible sections in the order below:

- Leads to Claim
- Leads to Waitlist
- Waitlisted Leads

In each bucket, the leads are sorted by time of broadcast with newest at top.

If any section has no leads to show, it shows blank message:
“There are currently no leads to claim.”
“There are currently no leads to waitlist.”
“There are currently no waitlisted leads.”

Following information is shown about the Lead:

- Builder / Project / Locality (City not in this version, till we have multi-city brokers)
- BHK / Size / Budget (BHK will not be shown in case of plot)
- Lead No.
- ~~Enquiry Time~~ (removed to make space for Lead No.)
- # of matching properties (added earlier by Broker)
- Special Requirement (if any)
- Client open to similar properties

<u>Duplicate Lead</u>
In case of duplicate/multiple leads, all lead's requirements will be shown here.

<u>Special Requirement</u>
In case client has any special requirements, First Call team will record this. Note that this field is different than the Client Query which is entered by client on website or is system generated.
It has Read more.. / Read less.. functionality when text crosses beyond 2 lines.

<u># Matching Properties Text Message</u>
Following message is shown for # matching properties.
a) X Matching Properties (matching properties are available)
b) No Matching Properties, add a property to claim the lead (matching properties are Not available)

<u>Real Time Messages</u>

- Countdown time to expire (messages will be updated every minute.)
  "X minutes to Expire" / "Lead Expired"
- # of Agents having claimed the lead. (not in v1, since only 1 agent can claim)
  "2 Agents can claim the Lead"
- Lead claimed by all allowed agents. (System Push to non claimed agents)
  "Lead claimed by another agent"

A Lead is shown as of Hot Quality when the lead Score is above a specific number which is configurable. (not in V1)

The Lead shown would be taken back (agent can only Wait list after this) in following cases:

- It expires (as per configuration; configured to 60 mins)
- It is awarded to its total quota of agents (only 1 agent in v1, max 3 in long term)

<u>Lead claimed by another Agent</u>
~~As soon as a lead is claimed by another agent, the server will push this update to the brokers who were earlier broadcasted this lead.~~

We will now not unnecessarily throw updates at all brokers who may not be interested in claiming this lead. SO, only once a broker tries to Claim a lead, will be show the appropriate message. (in this as well as Claim - Select Property Screen)
Message: “Sorry, The lead <LN2031> has been claimed by another agent.”

Claim buttons will be changed to Waitlist buttons, and message changed appropriately. (From expiration message to Lead claimed by another agent)
(In next version when more than 1 broker can claim the lead, the Claim button will not be removed till all claimant positions are taken)

<u>Actions</u>

- Claim / Waitlist / Add Property
- Decline – Agent confirms no available matching property.

<u>Claim</u>
The Claim button is shown only when there are matching properties available as per the backend logic.

To claim, agent needs to select a property matching with the lead’s requirement.

<u>Add Property</u>
If there are no matching properties with the agent in the system as per the lead’s requirement, then Broker will have to first add the property.

After adding the property from this flow, agent is brought back to this screen with the updated message of matching property available and Claim button available this time.

<u>Waitlist</u>
Once new lead expires, or is claimed by max number of agents, Agent can request to be waitlisted in case they want to be considered for the lead if and when lead is opened again due client needing to work with more broker contacts.

Waitlist has the same exact flow as of Claim lead in terms of his requirement to Select or Add a property. The claim - property selection screen will have the word ‘Claim’ replaced with ‘Waitlist’.

If system moves a unclaimed lead to Primary CRM, ~~then the Waitlist option will be taken away form here.~~
~~Message will be shown in place of the Waitlist button - “The lead is not available”.~~
Rather, the lead should be removed from the broker screen itself.

Decline

Broker may decline the lead if they do not have matching property, or do not want to work on this lead.

(This declined status will be used in analysis of broker performance, like in comparison to leads not responded to)

Declined leads are removed from the Claim List screen.

Expired, Lost , Waitlisted

Expired, Lost and Waitlisted leads appear for only 24 hrs since their time of being offered to the broker. (this time is configurable)

Expired & Lost Leads can be waitlisted. leads will have expiry or lost message, as applicable. Waitlisted Leads do not show any action button.

Section / Order of Leads

Leads appear in the Claim list in the following 3 sections / Order:

- Leads Available to Claim
- Leads Available to Waitlist
- Waitlisted Leads

These sections are collapsible.
First 2 sections are open by default, and last section is closed by default.

In case of no leads in a section, an empty card with a message will be shown:

- There are no leads to claim
- There are no leads to waitlist
- There are no waitlisted leads

Claimed Leads

Claimed leads are removed from the Claim screen as soon as they appear on the Task List as a new lead to work on.
(Note: If there is going to be a gap between claiming and appearing in task list, we will show the lead as claimed in the Claim list till the period of this time gap. I believe there is going to be no gap here.)

List Refresh

Server should refresh the claim list whenever there is a change - like a new lead to claim or when 60 mins (configurable) for lead expires. ~~or, another broker has claimed a lead.~~

When 60 mins are passed / lead expires, broker will be informed of the list refresh via a message “The claim time for Lead LN2031 has passed, the list will be refreshed”. This message will be shown for 7 seconds.

Claim Lead - Select Matching Property

Header Text
Clam Lead
“X Matching Properties”
Help text Alert: A help icon is shown on clicking which an alert is shown to explain the matching properties.

Sub Header Text:
<Lead No.>
Project <BHK>, <size> <budget>
Text: “Open / Not Open for similar properties” as per the flag setting.
~~Special Requirements (if any)~~ (removed to reduce text on this section)
Multiple projects in requirement will be shown.
Only For locality level lead, we will show locality here.

Matching Properties
Agent is provided with a list of ALL matching properties.
System will define the available matching properties.

The properties are sorted as per the matching score from highest to lowest, so that if Close matches exist, they are shown at the top.

Following property information is shown to the broker:

- Project
- Locality
- BHK / Size
- Asking Price

Multiple Leads
In case of multiple leads submitted by client, all the projects/lead requirements will be considered collectively for showing the matching list.

Offered Property for the Lead
When an agent submits a property (to claim a lead) and PropTiger awards the lead to the agent, this property becomes an “Offered property”..

Claimed Lead moves to Task list

Once a lead is claimed, the contact will be visible to Agent, and the Lead will start to Appear in the Lead list.

After claiming a lead, Broker is taken to the Lead Details page to act on the Lead.

Submit Button
Message shows next to Submit button for the number of properties selected.
Message:
2 Leads selected
No Lead selected, Select a Lead to Submit.

Failure Message:
In case of system failure, show the message:
System error occurred. Please try again.
In case of success, broker is taken to the Task List with the new lead awarded and shown at the top.

Limit to maximum number of leads
Allow broker to submit only 3 (configurable) properties to claim.
After selection of 3 properties, show a message to user on selection of 4th property that "Currently you can offer only 3 properties to the client. You may offer more later"

Lead claimed by another agent
In case the lead being viewed is claimed by another agent, while the agent is on the property selection screen, a message gets shown that "Sorry, The lead <XYZ> is claimed by another agent"
Button: OK

On click of OK, take the user back to the claim screen with this lead shown as awarded to another agent.

Claim Lead - Add Property

Help text Alert: A help icon is shown on clicking which an alert is shown to explain the matching properties.

Sub-Heading shows Property Requirements.
Text: "Open / Not Open for similar properties" as per the flag setting.
~~Special Requirements (if any)~~ (removed to reduce text on this section)
Multiple projects in requirement will be shown.
Only For locality level lead, we will show locality here.

Add Property in Claim Flow has following 2 screens:
(Mandatory info is marked with *)

- Project Details
    - City (defaulted to lead’s city and un-editable)
    - * Locality Name
    - * Project Name
- Property Details
    - * Configuration
    - * Size (Sq ft - default, Sq mt, Sq yd)
    - Floor
    - Tower
    - Value Details (2 options)
        - Option 1 (Rate)
            - * Demand rate (Rs / sq ft - default, Rs / sq mt, Rs / sq yd)
            - * Other charges (lacs, cr) (defaulted to 0)
        - Option 2 (Price - all inclusive)
            - * Asking Price (lacs, cr)

Similar Property Flag	**Requirement Level**	**Fields Checks**
No	Property Info available	Locality: (Fixed - 1 or more as per requirement) 1 - defaulted / disabled; More - drop down Project: (Fixed - 1 or more as per requirement) 1 - defaulted / disabled; More - drop down BHK / Size / Price: Entry - Allowed Any Acceptance - within the allowed range (as per Tertiary Matches)
No	Project Info available	Locality: (Fixed - 1 or more as per requirement) 1 - defaulted / disabled; More - drop down Project: (Fixed - 1 or more as per requirement) 1 - defaulted / disabled; More - drop down BHK / Size / Price: Entry - Allowed Any Acceptance - Any (as none is mentioned)
No	Locality Info available	Locality: (Fixed - 1 or more as per requirement) 1 - defaulted / disabled; More - drop down

		Project: Searchable from within the selected locality BHK / Size / Price: Entry - Allowed Any Acceptance - As per the range
No	1 Project / 2 Localities	Locality: 2 requirement localities in drop down. Project: 1 requirement project in case of 1 locality. Search from all projects in other locality. BHK / Size / Price: Entry - Allowed Any Acceptance - As per the range
Yes	Property Info available	Locality: Operating localities Project: Searchable from within the selected locality BHK / Size / Price: Entry - Allowed Any Acceptance - As per the range
Yes	Project Info available	Locality: Operating localities Project: Searchable from within the selected locality BHK / Size / Price: Entry - Allowed Any Acceptance - Any (as none is mentioned)
Yes	Locality Info available	Locality: Operating localities Project: Searchable from within the selected locality BHK / Size / Price: Entry - Allowed Any Acceptance - As per the range
Yes	1 Project / 2 Localities	Locality: Operating localities Project: Searchable from within the selected locality BHK / Size / Price: Entry - Allowed Any Acceptance - As per the range

Alert Message:

First Screen checks
First Locality and then Project will be checked in the given scenarios:

Locality check: (When Similar Property Flag = Yes)
"Locality does not match as per the client requirement. You can not claim the lead" Buttons - Continue / Change Locality

Project check: (When Similar Property Flag = Yes)
"Project does not match as per the client requirement. You can not claim the lead" Buttons - Continue / Change Project

In case user clicks on Continue without correcting the locality or project,~~ button on the next screen changes from "Save" to "Save Anyway".~~ No more checking of data will be done on next screen in this case, sinan not claim the lead anyway.
~~User will be shown the same alert message about the buttons.~~

Second Screen checks
First BHK followed by Size and price will be checked in the given scenarios (only if locality/Project added earlier is matching):

BHK Check: (When property details are available)
"BHK does not match as per the client requirement. You can not claim the lead" Buttons - Save Anyway / Change BHK

Size Check: (When property details are available)
"Size does not match as per the client requirement. You can not claim the lead" Buttons - Save Anyway / Change Size

Price Check: (When property details are available)
"Price does not match as per the client requirement. You can not claim the lead" Buttons - Save Anyway / Change Price

In case of more than 1 discrepancy, the button in non-last error should be "Continue" instead of "Save Anyway".
~~"Property details do not match as per client requirement. You can not claim the lead"~~
~~Buttons: Save Anyway / Change Details~~

Fields Specific logics in first screen

Locality is filled with options as in the table above.
Project is disabled till Locality is filled.
Non Proptiger Project is not allowed in this version.
Project is either pre-fixed or searched from the selected Locality.

Add Property Flow
For 2nd screen, follow the field logics as per the Add property flow.

My Leads / Task List

Be default All Leads (Status) are shown, and are sorted as per pre-defined criteria.

Relevance Logic
The list of leads/tasks are pre-sorted by Task Due Date/Time. (chronological order – older first)
In case of tie of due date/time, give higher priority to leads farther in the funnel.
~~Push Dead and Deal Closed leads to the bottom of the All leads list, with dead being at the bottom~~.
Lead Lost and Deal Closed leads are not a part of default “All Active” Status Filter leads.

There are 2 filter drop downs:

Options in the first filter “Status’ bucket drop down are:
- All Active (default)
- New
- In progress
- Site Visit
- Negotiation
- Deal Closed
- Lead Lost

2nd Filter drop down is for ‘Due Date”. It has following options:
- All (default)
- Due Today
- Overdue

Due Today / Overdue show only tasks planned for either Today or the past respectively.
# of such tasks are also shown next to the names if design allows enough space, else not.

Due Date filter becomes disabled in case of ‘Deal Closed’ and ‘Lead Lost’ Status selection.

Lead Info

There are separate visual indicators for Due Soon, Overdue tasks, New, Lost and Closed with different colors.
Beyond 24 hrs, the time will be shown in days.

Following Lead information is shown in the lead list.

- Lead #
- Contact Name
- Project (Selected Property for Meeting, Site Visit and Deal Closed statuses)
- Project (Last Offered Property for In Progress status & Dead status)
- Locality (if project not given in lead)
- Next Task Type
- Due Date
- New / Overdue / Due (as per the due date)
- Last Task Type and Date (Not for New, Dead and Closed leads)
- ~~Last Task Status (Not for New, Dead and Closed leads)~~
- Deal Closed On Date (for Deal Closed leads)
- Marked Dead On Date (for Dead leads)

Broker clicks on any lead card and proceeds to the Lead / Task card.

# of Leads/Tasks
To keep the list load time under control, Not more than 20 leads will be loaded in the list. As user scrolls down and reaches the 20th lead, the next set of 20 leads will be loaded.
If speed is not a concern, then we may show all leads as well.

Lead / Task Screen

Agent clicks on a Lead in the task list and gets to view the Lead screen, which has following sections:

- Header (Lead No., Lead Status and Contact link)
- Requirements (Expandable)
- Perform Action (Call/Email/SMS)
- Scheduled Task (Revise Task & Mark as Complete)
- Task History (Expandable, View Only section)
- Offered Properties (View/Offer Properties)

Perform Action

Agent can make a call or send sms / email by clicking appropriate button from this section.

Call

For making a call, agent will be sent to the phone's call section and the call will be started with the default number. After agent completes the call, the View Lead screen with the scheduled Task card should be presented to agent to record the communication and mark the task as complete.

Call will be made to the default number.

Call time Record
It is imperative that we record the time of call when broker completes the current call task. This is doable when user had clicked on the phone icon from the Task screen, and user comes back to the same task screen to record the task.
Do ensure that recording is done for the same client's task, and no other client by checking the phone number.
Recording should be done for the call start time and call duration by recording this from the Phone's call details.
When this call task is marked complete, the above recorded actual call start time should be saved in place of task completion time. Call duration should also be saved in DB, though it is not shown to the Broker. It will be used for audit purposes.

SMS

When agent clicks on SMS, agent is taken to the phone's SMS section with the client selected if available in contacts, else the client number is typed already.
SMS will be sent to the default number.

After agent sends the SMS, the View Lead screen with the scheduled Task card should be presented to the agent.

Email

An email form is opened up with following fields:

- Send To (client ID selected here)
- ~~Template~~
- Subject
- Body

It has a back button at the top.
Other 2 buttons are Cancel and Send.

Send To
There will be an option to send to secondary email (if exists)

Agent can choose to send to both or either of these email IDs. (primary is selected by default)

Multiple Clients
If user chooses to send email to multiple clients (from the Property page as Offer or Share images or location), then emails of multiple clients would be shown here with primary selected by default for all.

By default, the IDs are hidden and shown as <Contact Name> + 1 other.

Email Scenarios
1. From Task view screen
2. From Complete current task screen (when user gives status as client asked for project details)
3. From Offered Properties screen
    a. User offers a property
4. From Property screen
    a. ~~User offers a property~~
    b. User shares location of property
    c. User shares images of property

Options 1 & 2

Templates are not used or available to broker for sending mails in these 2 scenarios.

Options 3 & 4
If agent sends email from Property screen, they are required to choose from the client they want to send email to. This is the list of clients to which this property is Offered to. These are leads which are Active (not dead or closed won).

As in these cases user does either of these 2 actions:
- shares the location
- shares the images.

The template will be pre-selected and subject / body fields will be pre-filled with the information which user can edit. The template field will ~~be disabled~~ not be displayed even in these cases.

Email Templates
There will be some ready templates available for agent, on selection of which the Subject and Body gets filled with the appropriate content.

List of templates:
- Project Details (used in Offer process)
- Project Location

- Project Images

<Subject / Description of the templates> needs to be defined here.

CC/BCC
Emails will be marked cc to broker ID (later on Agent ID, when mapping is done) and bcc to channel manager ID (available in setup).

From / Reply To
When email reaches the client, it is from a fixed proptiger email ID like DonotReply@proptiger.com.

For client to be able to reply back to the broker, the Broker EMail ID (and later agent email ID, once the mapping is available in future phase) is set in the "Reply To" facility.
Can we use broker email IDs here, or have to create there IDs on our server?

Recording in Task History
When an email is sent, the time is recorded and will be used when the next Email task Type is marked Completed (as in the case of call).
~~Comment is recorded as "Email - <email subject>".~~
After sending email, the broker is brought to the screen flow they were in.

Scheduled Task & Mark as Complete / Setup next task

This section displays the next scheduled task.

It shows following fields of the Task:

- Task Type
- Due Date (Highlight with text including delay in red if overdue)
- Notes (if any, else hide this field)
- Property (only for task type as Site visit, Negotiation Meeting and Deal Closed)
- Enquiry Date (only for Lead dead and Deal Closed)

Default 1st Task for New Lead:
In case of a New lead, it displays a system created task of 1st Call with Due Time set to 5 minutes (configurable) from the Lead creation time.
Notes for default 1st Task: "Contact the client to discuss the requirements".

In case of Dead Lead, it shows following information:

- Status (Dead Lead)
- Date marked Dead on
- ~~Enquiry Date~~

- Dead Reason

In case of Closed Won Lead, it shows following information:

- Status (Deal Closed)
- Date marked Closed Won on
- Project for which Deal is Closed
- ~~Enquiry Date~~

New task can not be set for Dead and Closed Won leads (even if broker calls, emails or send sms from the lead details screen).

Action Buttons (in case of Non-Dead and Non-Deal Closed leads)

- Revise Task
- Mark as Complete (Next task also gets created within this step)

Revise task

Revising a task allows the broker to make changes to the scheduled task by making changes to the following:

- Due Date / Time
- Project (in case of Site Visit and Negotiation tasks)
- Notes

Mark as Complete

This button in the Scheduled Task section allows broker to perform to tasks:

1. Complete the current task, and
2. Create Next Task.

Note: Current task gets completed only when the screens of Next Task also get completed, and get recorded in DB.

There are 4 set of sequential tasks to be completed by the broker:

- Call
- Email
- Site Visit
- Negotiation

Lead Status gets changed to next level when the existing task type is marked Done for the 1st time.

Lead Status:

- New
- In Progress
- Site Visit
- Negotiation
- Deal Closed
- Lead Lost

Rules of Lead Status change are given below:

Existing Status marked done for 1st time	**Existing Lead Status**	**New Status**
1st Call Marked Done	New	In Progress
1st Site Visit Marked Done	In Progress	Site Visit
1st Negotiation Marked Done	Site Visit	Negotiation

“Negotiation” moves to “Closed Won” status when current negotiation task status is marked as “ATS signed and Cheque collected”

“Lead Lost” status is achieved when current task status is marked as “Client not interested in any property”

Step 1: Complete current task

Broker selects the current task status mandatorily by selecting from a set of choices given as per the task type of current task.

Statuses as per Task Type:
Call / Email:

- Done, set next task
- Lead lost, Client not interested in any property

Site Visit:

- Done, set next task
- Canceled, set next task
- Lead lost, Client not interested in any property

Negotiation:

- Signed ATS & Cheque collected

- Done, set next task
- Canceled, set next task
- Lead lost, Client not interested in any property

Notes:
The optional notes field shows the value filled by user for this task earlier. User may update notes from earlier setup.

Closed Won:
For comment corresponding to Closed Won “Signed ATS & Cheque collected”, user specifies the Property for which the deal is done. Broker is shown the list of Offered Properties to choose from.

Lead Dead:
Dead reason to be mandatory provided in case of comment corresponding to Dead status - “Client not interested in any property”.

Dead Reasons:

- Negotiation failed
- Did not like the property
- Want a fresh property in Primary
- Will buy later
- Bought from another broker
- Could not be contacted
- Requirements differ
- No Broker Found (Do not display, for system need)
- No Broker Claimed (Do not display, for system need)

Deal Close Alert
When the status of a lead is changed to “Deal Closed”, Ops team and Channel manager are alerted of the transaction, so that they can proceed with the steps of recording and processing transaction at their end.

Single Task Dependency
After selecting the Status and optionally updating Notes, clicking on Done takes broker to the next step of creating the next task.

The current task is not updated in system till the Next Task is saved successfully, since at any time there has to be at least a single task for an open task.

Step 2: Setup Next task

Task Type:
Broker chooses from the options of Next Task Type.

Next Task Types are available as per previous task type is Done for at least 1 time or not, as defined in the table below:

Existing Status marked done for 1st time	**New Task that becomes available**
1st Call Marked Done	Email (Call already available)
1st Email Marked Done	Site Visit (Call, Email already available)
1st Site Visit Marked Done	Negotiation (Call, Email, Site Visit already available)

The task type is however defaulted (suggested) to one which is defined as per the mapping with the comment entered in completing earlier task.

If “Done” is selected, then the next task type in hierarchy is suggested.
If “Cancelled” is selected, then the same task type is suggested/defaulted.

Schedule Next Task Type:
Following fields are updated while setting up a next scheduled task:

Follow Up Date / Time:
User enters a Follow up Task Date / Time (mandatory field)
Date / Time can not be prior to current date / time.

Notes:
User can also make optional Notes specific to client or specific for the task.

Select from Offered Property:
In case of Site Visit & Negotiation task, broker is required to select a property from the list of properties offered to the client so as to record the one or more list of properties for which the site visit or negotiation is happening.

Site Visit allows selection of more than one property but Negotiation allows selection of only one property.

(In this version we are not enforcing that a prior site visit is mandatory before negotiation can be setup for an offered property. This is because a broker may plan for one property’s site visit, but also has to cover another property in the same trip without updating the system of site visit status)

Email Task Type selection

In case the broker selects ‘Email’ as the next task type, they get to choose from following options:

- Schedule
- Skip, already shared property details

Schedule:

In case of Schedule, Broker is shown the fields as described above in the schedule section.

Already offered a property, Skip:

This option is used when broker has already sent an email while offering a property or if they do not want to send additional details since during claim, project details email has already been sent.

In this case, the Next button changes to “Skip”, and broker is taken to Set Next Task, considering Email task as ‘Done’.

Client Reminder

In case of site visit and negotiation, Client Reminders will be sent to both primary and secondary email IDs / phone numbers.

(In v2, agent will have ability to select from primary and secondary options.)

The Reminder SMS text and Email text are fixed templates, whose content will be <provided here>

Day Time limitation

The SMS can not be sent before 8 AM on any day.

Example: A meeting is set up for 9 AM, and client reminder is set for 2 hrs. Though the SMS should be sent at 7 AM, but with this limitation, it will be sent only at 8 AM.

Back Button Behavior

User clicks on back button of Phone:

Broker is brought back to the previous step of Complete Task

When broker clicks back from step 1 (Complete Task), Broker is asked following query:

Skip completing task

All your changes will be lost

Cancel / Skip

User clicks on back button of Header (from any step - Complete Task or Set New task):

Broker is asked following query:

Skip completing task
All your changes will be lost
Cancel / Skip

Lead Requirements

Agent can view requirements by clicking on its section link which opens the whole section:

- City
- Locality
- Project
- BHK Type (range)
- Budget (min and max)
- Size (min and max)

Flag “Customer open for similar properties”
Depending upon the flag “Customer open for similar properties”, broker is shown the messages as the case:

Flag - Yes
Message: Client open for similar options

Flag - No
Message: Client is not open for similar options

Add Locality in Requirement
In case client is open for similar options, then the Broker can also add more localities to the requirement to offer the client more options that are outside the current matching properties set. Allow addition of locality in requirement.
The button takes user to another page where he can add the Locality from the list of operating localities of the broker. The list to add localities from, shows only the localities not already in the original requirements.

Localities that were added by the broker can be deleted also. (Original requirement localities can not be removed)

Task History

The Task History card in Lead screen shows the tasks already performed by the Agent.
The card shows the number of tasks performed previously when in default closed state.

If there is no task performed yet, then this card will not be displayed.

In case of 1 or more tasks performed, clicking it will open down the Task History section which will show the following details in the task records:

- Comment
- Date (when task was updated)

A specific task may have further drop down in it, if it has any additional information

- Notes (optional)
- Project (only in case of site visit, negotiation meeting tasktype)

Offered Properties

This section shows the number of offered properties.

View / Offer Properties

This facility allows broker to offer more properties to the client if required from within the Matching properties list.
By default, the property used to claim the lead is the only offered property.

For Dead and Deal Closed leads, the button is renamed from “View / Offer Properties” to “View Offered Properties”.

Offer Property
Offer button is shown only if there are any unoffered properties in the matching list.
Once user selects from the matching list and clicks on “Offer Property”, they are taken to the email screen, where they can offer the property through email by sending them project details link on proptiger website.

The subject and the body of the email will be prefilled with the information of template (Project details) and the projects selected to be offered.

~~Skip option~~
~~Broker also has an option of “Skip Email’ in case they do not want to send the offer email to client. In this case the button Cancel is replaced with button Skip Email’. In this case, the property will still be offered.~~

Site Visit / Negotiation / Deal Closed status
There are other value-adds that the agent can perform from the Offered Properties screen:

- Site Visit / Negotiation / Deal Closed status

Depending upon whether the site visit or Meeting is scheduled or completed or not planned, the valve will be shown accordingly as -

- Not Done,
- Pending, (this is not applicable for Closed Won)
- Done

Until the relevant status is reached, these fields will not be shown.

- Feedback (Not in V1)
  This is an input field to collect client feedback on the linked property.

Deleted Property
Deleted properties are not shown in the list unless they were offered to the client.
In case they were offered, they are shown with the highlight “Deleted”.
They can not be clicked to view further details.

View Offered Properties

For a Dead lead or a Closed Won lead, the View / Offer Property button is changed to “View Offered Properties” which shows only the Offered properties list and no action button in it. User can however click on them and go in to the property card.

Property List

Agent can at any time view the list of properties they have in their system, and Add, Edit or Remove from the system.

The Properties list screen is accessible from the Menu bar.
It has all the properties shown their in form of cards. Agent can view the greater details by clicking on any card.

Sort options:

- Newest (default)
- Oldest
- A-Z
- Z-A

Newest:
Properties are sorted by default as per the freshness in the system with most fresh shown at the top.

Other sorting options is by Oldest
(Search/Filter is in V2)
Freshness is governed by ‘refreshed timestamp’.

Refresh Timestamp
A property gets refreshed in these instances:

1. Property is added in system
2. Property is edited in system (example - amenities changed or images uploaded)
3. Property is offered to a client
4. Property is used to claim a lead
5. Property images are shared
6. Property location is shared

Details in Property Card:

- Property ID
- Project
- Locality / City
- BHK / Size
- Asking Price

Add New Property button available here.

Long Press for options:
User can long press on a property to see following options:

- Share Location
- Delete

Property View

Clicking on any property card will open the Property Details screen with following fields:

- Header Card
    - Property Details (text)
- Sub Header Card
    - Project Name
    - Property ID
    - Offered Status
    - ~~Offer button~~
- Property Details
    - Locality Name
    - City
    - Configuration / BHK
    - Size
    - Floor (show only if available)

    - Tower (show only if available)
- Value Details
    - Demand Rate (show only if provided in form)
    - Other Charges (show only if provided in form)
    - Asking Price
- Additional Details
    - Parking
    - Power Backup
    - Club Membership
    - Other Special features
    - Images
    - Share Images button (only for property which is already offered to at least one client)
- Persistent Footer
    - Edit button
    - Delete button
    - Share Location button (only for property which is already offered to at least one client)

Images Selection
Images can be selected / deselected through long press on them.

Delete Images
Images can be deleted in the Edit mode only. Here the broker will get a confirmation message "Are you sure you want to delete this image?"

Share Images
This facility (button) is available only when the property has been offered to one or more clients. Broker can share the images of an offered property by sending an email through a pre-filled template as per the property. User can make any edits to the pre-filled text.

User will be shown the list of Clients to which the property has been offered.

Edit button
Clicking on the Edit button will open the Edit Property screen

Share Location
This facility (button) is available only when the property has been offered to one or more clients. Broker can share the location of an offered property by sending an email through a pre-filled template as per the property. User can make any edits to the pre-filled text.
User will be shown the list of Clients to which the property has been offered.

~~Offer Properties~~

~~User can offer the property from this screen.~~
~~User will be shown the list of clients whose requirements are matching with this property.~~
~~Post selection of client, user is presented the email form which has the property detail template defaulted for the property and emails of selected clients.~~
~~User has option to Skip sending the email. Property would be offered to selected clients even in the case of Skip.~~

~~Messages:~~
~~"There are no clients with matching requirements"~~

Delete Button
If the property is not available any more for sale, user can mark the property as Deleted.
Broker will get a confirmation message "Are you sure you want to delete this property?"
In system, it will be marked as disabled,
The property will not be visible in the property list.
Disabled properties can neither be offered nor used for claim.
These properties will not be available for selection in the task.

Only In Offered Properties list, it will be shown as Deleted if the Property is already Offered, and the Property card can not be clicked.

Messages:
Broker will get a confirmation message "Are you sure you want to delete this property?"

In Offered properties, on click of a Deleted property - "You can not view a deleted Property"

~~**Refresh (Not in V1)**~~
~~This facility or button is available only when the property is older than a preset time period (1 month configured for now). Broker is alerted of such old property to either refresh it or disable it in case it is not available for sale.~~
~~Clicking the button updates the refresh timestamp, and indicates the system that the property is fresh and available for sale.~~

Add Property
Add Property has following cards
(Mandatory info is marked with *)

- Project Details
    - * City (show as text, if single value, else a drop down of cities broker is operating in)
    - * Locality Name
    - * Project Name

- Property Details
    - * Configuration
    - * Size (Sq ft - default, Sq mt, Sq yd)
    - Floor
    - Tower
    - Value Details (2 options)
        - Option 1 (Rate)
            - * Demand Rate (Rs / sq ft - default, Rs / sq mt, Rs / sq yd)
            - * Other Charges (lacs, cr) (defaulted to 0)
        - Option 2 (Price - all inclusive)
            - * Asking Price (lacs, cr)
- Additional Details
    - Parking (available/ not available)
    - Power Backup (available/ not available)
    - Club Membership (available/ not available)
    - Other Special features
    - Images (allow upload, delete)

Allow upload, deletion of images

<u>Project Details</u>

City: City is 1 or more city of operation as defined in broker setp. If single, then it is prefilled. If more than one, then it is a drop down with multiple selectable values.

Locality:
Locality should be pre-filled with the set of localities where the Broker is registered to be working. If single, then it is plain text. If more than one, then it is a drop down.

Project:
Project search should only be from the locality selected above.
User is not allowed to add a project not in the Proptiger.com list.

Error message:
“Please add a locality”
“Please select a project from the suggested list. “

<u>Property Details</u>

Configuration:
This field shows pre-filled the various configurations of BHK or plots as per the selected project.

Allow addition of “Other BHK” configuration if what broker is looking for is not available in the list. Do not show “Other BHK” if it is an only Plot type project without any apartment, villas.

In case of Other BHK, User gets to choose from a drop down with prefixed values of 1, 2, 3, 4, 5, 6, 7

Floor / Tower:
Floor and Tower fields are not shown if the configuration is a Plot type.
Floor and Tower are open text fields.

Size:
Size field gets pre-filled with the selected configuration as per mapping in our db, and is editable.
In case of Other BHK selected above, user has to add size themselves.

Error Messages:
“Please select a configuration”
“Please specify size of property”

<u>Value Details</u>
In option 1 of Rate, the Asking Price is auto-calculated and displayed below the entered values.
It is computed as Demand Rate * Size + Other Charges.
Other charges is defaulted to Zero.

In option 2 of Price, user specifies the Asking Price directly.

Message:
“Price entered by you is beyond the market range” Buttons: Change Price, Continue

<u>Additional Details</u>
The 3 fields Parking, Backup & Club Membership have drop down options as Available/ Not available.
These fields are pre-filled as per the project information in our DB.

User can fill any text information in the field “Other Special Features”

<u>Images</u>
Broker can upload Image from the gallery, etc.
Broker can upload only 20 images.
Uploaded images can be removed also.
Before deleting the confirmation message is asked “Are you sure you want to delete this image?”
Save / Cancel takes back user to property list screen.

~~**Maintain State for Revert during accidental App Close**~~

~~If the App gets closed by mistake, then the state / data of the Add process should be maintained and either presented at the same step, or through a message, that "You did not finish adding a property last time. Do you wish to finish adding the property?"~~

Back Button Behavior
User clicks on back button of Phone:
Broker is brought back to the previous step (2 from 3, and 2 from 2)
When broker clicks back from step 1, Broker is asked following query:
Skip adding property
All your changes will be lost
Cancel / Skip

User clicks on back button of Header (from any step):
Broker is asked following query:
Skip adding property
All your changes will be lost
Cancel / Skip

Edit Property

For Edit Property mode, only the screens with optional fields is shown (Property information and Additional details as two steps).
Only optional fields can be edited. Mandatory fields are not marked so, and are disabled.
Header text is Edit Property <Property ID>)

Push Notifications and Alerts/Notifications

For alerts list and messages, refer the backend spec.

To help agent by reminding him of important tasks, some of which are given below for reference: (The logic and details of these will be in the backend spec.)
Alerts

- Unclaimed Leads (expiry time, available properties, claims left, Hot lead)
- Missed Follow Ups
- Waitlisted Lead is awarded
- New leads are stopped

Notifications

- Upcoming Follow Ups
- Duplicate Leads for existing Contact
- Confirm property availability (when property is old)

There are two ways the alerts are shown:

Once a new alert arrives, it appears for 7 seconds at the top of the screen. It can be closed by user also.

Alert Icon is always shown at the top right in header of all screens, thus it is available at all times. The Alert icon in Header shows a number which means the number of alerts at that point of time. Every time server pushes an alert, the icon is updated with the number.

There are two kinds of alerts - Alerts / Notifications:

- Alerts: that are shown until the situation is resolved
    - Example - An unclaimed lead exists. This alert will keep displaying till the agent either claims the lead or suggests no property available.
    - List of such alerts / Messaging / Click Action

Note: Separate messaging for single and multiple cases is provided.

Alert Description	**Message Displayed**	**Click Action**
Unclaimed Leads - Shows the number of leads that are available to be claimed (when a lead is broadcasted)	Single (project info available): A lead for project <project name> is waiting to be claimed. Single (only locality info available): A lead for locality <locality name> is waiting to be claimed. Multiple: 2 Leads are waiting to be claimed	Clicking here takes broker to Claim screen
Missed Follow Ups	Single: You have an overdue task for Lead No. <lead no.>, <Customer name> Multiple: 2 Leads have Overdue tasks	Clicking here takes broker to Task List screen / In Progress In case of single lead - open the Lead Task page
New leads are stopped	Your New Leads have been stopped, please update existing New tasks to receive new leads from PropTiger	Clicking here takes broker to Task List screen / New Leads, so that user can update the task status

Broker app is closed	You have 3 Overdue tasks in your Task List. Please open PTNxt App and update the pending status	Clicking on this Push Notification opens the App on the task list screen > Status-All & Due Date-Overdue.

Note:

1. New Leads are stopped is the highest level alert and needs to be highlighted than other alerts. So the icon will be red alert.
2. Alerts are differentiated from Notifications by showing them in reddish background color.

- Notifications: that are informative
    - These alerts are removed in 2 ways:
        - User clicks on the alert to view the scenario (even from the flashed alert message)
        - User removes the alert
    - List of such alerts / Messaging / Click Action

Alert Description	**Message Displayed**	**Click Action**
Upcoming Follow Ups (for Call and Email tasks due in next 30 mins) This alert is not combined in case of multiple follow ups.	You have a <Call> task due at <time in HH:MM PM> for Lead No. <lead no.>, <Customer name>	Clicking on it takes broker to the task management screen
Upcoming Follow Ups (for site visit / negotiation tasks due in next 2 hrs) This alert is not combined in case of multiple follow ups.	You have a <Site Visit or Meeting> task due in next 1 hr for Lead No. <lead no.>, <Customer name>	Clicking on it takes broker to the task management screen
Duplicate Leads for existing Contact (This does not show in case the Lead is Closed Won, Dead, Declined or Waitlisted.)	<Customer Name> has submitted another lead. The new information is updated in existing Lead No. <Lead No.>	Clicking on it takes broker to the lead / task management screen
Confirm property availability (when property is old)	You have <No. of expired inventory> properties which are more than xx days old.	Clicking it takes the user to the property list sorted by ‘oldest’ properties

	Please update your inventory to get most relevant leads	
Waitlisted Lead is awarded	Single: You have been awarded 1 waitlisted Lead for project <project name> Multiple: You have been awarded 2 waitlisted Leads	Clicking here takes broker to Task List screen / New Leads. In case of single lead - open the Lead Task page

Note:

- Do not send Due Alert for New tasks.
- Once a task becomes overdue, the Due Task Notification will be removed.

Alert Time

Time will be displayed below the alerts.
Time displayed in an alert group will be that of the latest alert within the alert group.
Example:
If 2 leads are waiting to be claimed, then the time of the latest entry will be shown.
If 3 leads have overdue tasks, the latest overdue task's time will be displayed.

If the time is beyond 24 hrs, then time will be shown in days,
Example - 3 days
For alert less than 1 day old, time will be shown. Example - 4:24 PM

Push Notifications

In case the App is closed, the Alerts defined above are shown to user as Push Notifications.
On clicking on the Notification, user is taken to the App Screen as defined above.
Push Notification messages are defined in the table above.
Thus notifications serve the purpose of bringing the broker to the App so as to work on the Leads.

Push Notifications of a similar kind will update the existing push notification, and not create a new one.
Example - If 1 push notification was sent earlier for "1 unclaimed lead", and there is a new unclaimed lead that comes after 30 minutes, then the existing notification will be updated as "2 unclaimed leads".

Extras

There could be more alerts and notifications that may be pushed from the server.

Menu

Menu allows global navigation for agent from anywhere to any functionality.
It has following options

- Leads
- My Properties
- My Clients
- Alerts
- Reports (not in V1)
- Settings (not in V1)

Menu vs Back button in Header

Menu appears on the Top level Lists

- Claim List
- Task List
- Property List
- Contact List
- Alerts

Back button appears on all pages which are below the lists like:

- Claim - Select / Submit Property
- Claim - Add Property
- Add Property
- Edit Property
- View Property
- View Contact
- Edit Contact
- View Task/Lead
- Offer Property
- Send Email
- Revise Task
- Mark as Complete
- Edit Requirements

Sign In / Verification

Verification is done through user's mobile number registered with us.
Broker specifies his phone number in the Verification form and clicks on verify button.

Broker will be asked a Confirmation message to recheck the phone number.

System will make 2 tries to verify the number, and the screen will show this status, and allow broker to edit the number.

After verification, a success message is shown in the App.

Errors:

- If verification fails, user is asked to check their SMS sending capability, and Retry.
- Number entered is not registered with us in the broker setup. Broker is asked to either enter correct number or contact the channel manager to get their number updated.

In case of tablet when SIM is not inserted, user will receive a 4 digit PIN on their phone, which will be required in the next screen for completing verification.

Contacts List

In V1, contacts of only Leads are shown in the system.

(Seller Contacts - owner of properties are not maintained in system in V1 for simplicity reason)

Sort:

- Newest (default)
- Oldest
- A-Z
- Z-A

(Search ability will be provided in V2, since in the starting broker will have limited contacts.)

~~A contact can of three types:~~

- ~~Buyer~~
- ~~Seller~~
- ~~Buyer / Seller~~

~~By default, the Leads given by proptiger add a contact with type as buyer.~~

~~The list can be bucketed in following ways:~~

- ~~All (by default - Both Buyers and Sellers)~~
- ~~Buyers~~
- ~~Sellers~~

Following fields are shown in contact list cards:

- Name
- Lead ID

- Project (Selected Property for Meeting, Site Visit and Deal Closed statuses of lead)
- Project (Last Offered Property for In Progress status & Dead status)
- Locality (if project not given in lead)
- Email (show the default email)
- Phone (show the default number)

Edit Contact

~~Rules for V2:~~
~~A) Proptiger created contact will be of type - 'Buyer'.~~
~~B) Broker created contact will only be of type - 'Seller' or 'Buyer / Seller'.~~
~~C) While editing, the 'Buyer' or 'Seller' can only be changed to 'Buyer / Seller'.~~
~~D) A Proptiger created buyer contact can not be changed back to 'Seller' from 'Buyer / Seller'.~~
~~E) A broker created contact can not be changed back from 'Buyer / Seller' to 'Buyer'.~~

There are only 3 mandatory fields in Add mode: (Add mode not available in V1)

- Name
- Mobile
- Email

These fields become view only for Proptiger created contacts in Edit Mode.

Of the two sections, Information and Address, only one is editable at a time
Here is the list of all editable optional fields:

Information Fields

- Name (view only)
- Mobile (set as default for call/sms) (view only)
- Other Phone
- Email (set as default for call/sms) (view only)
- Other Email

Address

- Address 1
- Address 2
- City
- State (drop down only when country is India)
- Country
- Zip Code

Set as Default:
Agent can set the Other email or Other phone also as the default.

‘Set as default’ for Other fields should be allowed only if the there is a value in those fields.

View Contact Screen

Lead ID is the active Lead for this contact in case there are multiple leads against this contact.(There could be a dead or closed won lead also)
Lead ID is clickable to Lead/Task Page.

Agent can make a call or send email from this screen, leading up to the opening of lead screen for recording the task.

After call, broker should be taken to the corresponding Lead / Task screen corresponding to this contact.

After email the broker should be taken to the corresponding Lead / Task screen corresponding to this contact, and the email should be recorded as a task for this lead.

<u>Add Contact to Phone</u>
Agent can also add the contact to the phone, if number does not already exist in the phone contacts list.

Using this feature/button, the contact is added to the phone’s contact list by showing the Name, Primary Phone, Secondary Phone, Primary Email, Secondary Email prefilled in the Contact Add screen. Or if possible completely adding the contact itself.

A check however must be done if phone number already exists, then duplication should not be allowed.

Reports (not in ver v1)

1st version has only 1 report regarding the sales pipeline

Access: This section is viewable only by the Broker manager by default. Others need to have access to view the report.

The sales pipeline report will allow following views to the broker.

- # of Leads in different status
- # of leads project wise.

Settings (Not in V1)

Broker can change their App settings from here:

App Notification Toggle (Not in V1)
This toggle allows to turn the notification On or Off.

Agent Alerts duration (Not in settings, but configurable by System Admin)

The time difference in alerts and follow up time can also be set with following options:

- 15 mins
- 30 mins (For Call and Email/SMS task type)
- 45 mins
- 60 mins (For Site Visit and Meeting Type)
- 2 hrs
- 4 hrs

Client reminders duration (Not in settings, but backend only)
Broker can also choose the duration before the Site Visit Time when the reminder will be sent. Default time difference in reminder is set at 2 hrs before the meeting or site visit time, which can be changed to following in the settings:

- 1 hr
- 2 hr (default)
- 4 hr
- 24 hrs

Offline Sync (V2)

<Spec will be added here in V2)

Configurations

Agent Alerts duration

- Upcoming Due Date Follow Up
    - 30 mins (For Call and Email task types)
    - 2 hrs (For Site Visit and Negotiation Types)

Client reminders duration

- 2 hr (default)

General Message

No Internet connection message:
Your network connection seems to be lost. Please enable internet connection and try again.

Phase 2 Items

1. Allow Project addition outside of Proptiger DB
2. Offline Sync
3. Reporting
4. Settings
5. Search / Filters in Property / Contact List
6. Add Contact to Phone
7. Client Task Reminder
8. Image Categorization