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Propertybase for Real Estate

Propertybase for Real Estate Industry

Larger Key

Actors

Agent

Responsibilities

Receive the Lead  
Connect With Lead  
Qualify the Lead  
Unqualify the Lead  
Presentation with Lead  
Show Property To Lead  
Negotiate with the Lead  
Sign SPA with Lead  
Sign Rent Agreement With Lead  
Close the Lead

Manager

Responsibilities

Check Agents Reporting Line  
Create the Sales Funnel for the Agents  
Track Lead of the Agents  
Track the Deal of the Agent  
Ensure Agent Updating the information  
in System

Department Head

Responsibilities

Check Agents Reporting Line  
Create the Sales Funnel for the Agents  
Track Lead of the Agents  
Track the Deal of the Agent  
Ensure Agent Updating the information  
in System

Management

Responsibilities

Check Agents Reporting Line  
Create the Sales Funnel for the Agents  
Track Lead of the Agents  
Track the Deal of the Agent  
Ensure Agent Updating the information  
in System

Marketing Team

Responsibilities

Check Agents Reporting Line  
Create the Sales Funnel for the Agents  
Track Lead of the Agents  
Track the Deal of the Agent  
Ensure Agent Updating the information  
in System

Marketing Manager


Responsibilities

Check Agents Reporting Line  
Create the Sales Funnel for the Agents  
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Marketing Head

Responsibilities


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**Listing Admin**


**Responsibilities**  
Create Listing  
Update the Listing  
Show or Withdraw Listings from Portals  
Update the Price and other Details  
Follow DLD Guidelines

**Admin Manager**


**Responsibilities**  
Quality Check of the Listing  
Talk to Property Portal Contacts  
Resolve the issues to increase the visibility of the listings  
Measure the Performance of Listings  
Ensure Listing Follow All best Practice  
  
Create and maintain the Agent's Profile on the Portals  
  
Ensure that listing are following best Practices in case of not handle the case and provide the approvals  
  
Re-Assign the Listing of Off-boarded Agents

**Operation Head**


**Responsibilities**  
Ensure the Listings are Correct and high Score  
  
Ensure the Agent issues regarding the Leads escalated to Portals  
  
Ensure Agent Pass RERA Exam so that Listing can be published on theirs names

**Finance Executive**


**Responsibilities**  
Check Agents Reporting Line  
Create the Sales Funnel for the Agents  
Track Lead of the Agents  
Track the Deal of the Agent  
Ensure Agent Updating the information in System

**Finance Manager**

**Responsibilities**  
Check Agents Reporting Line  
Create the Sales Funnel for the Agents  
Track Lead of the Agents  
Track the Deal of the Agent  
Ensure Agent Updating the information in System

**AML**

**Responsibilities**  
Check and Verify the Deals  
Check Source of Funds  
Validate the Source of Funds  
Take appropriate measure not to get the fine from DLD

**Finance Head**

**Responsibilities**  
Check Agents Reporting Line  
Create the Sales Funnel for the Agents  
Track Lead of the Agents  
Track the Deal of the Agent  
Ensure Agent Updating the information in System



## Lead Co-Ordinator

### Responsibilities

Assign the Leads to New Agents

Track the Performance of Agents in terms of Processing the Leads

Track the Leads of Offboarded Agents and distribute Among the Existing users



## Lead Quality Checker

### Responsibilities

On Random basis check the Leads and its Quality

Check all Leads from All Portals are registrar in the Salesforce

All the Details of the leads are captured

Ensure that the Agents are Updating the Leads



## Lead Manager

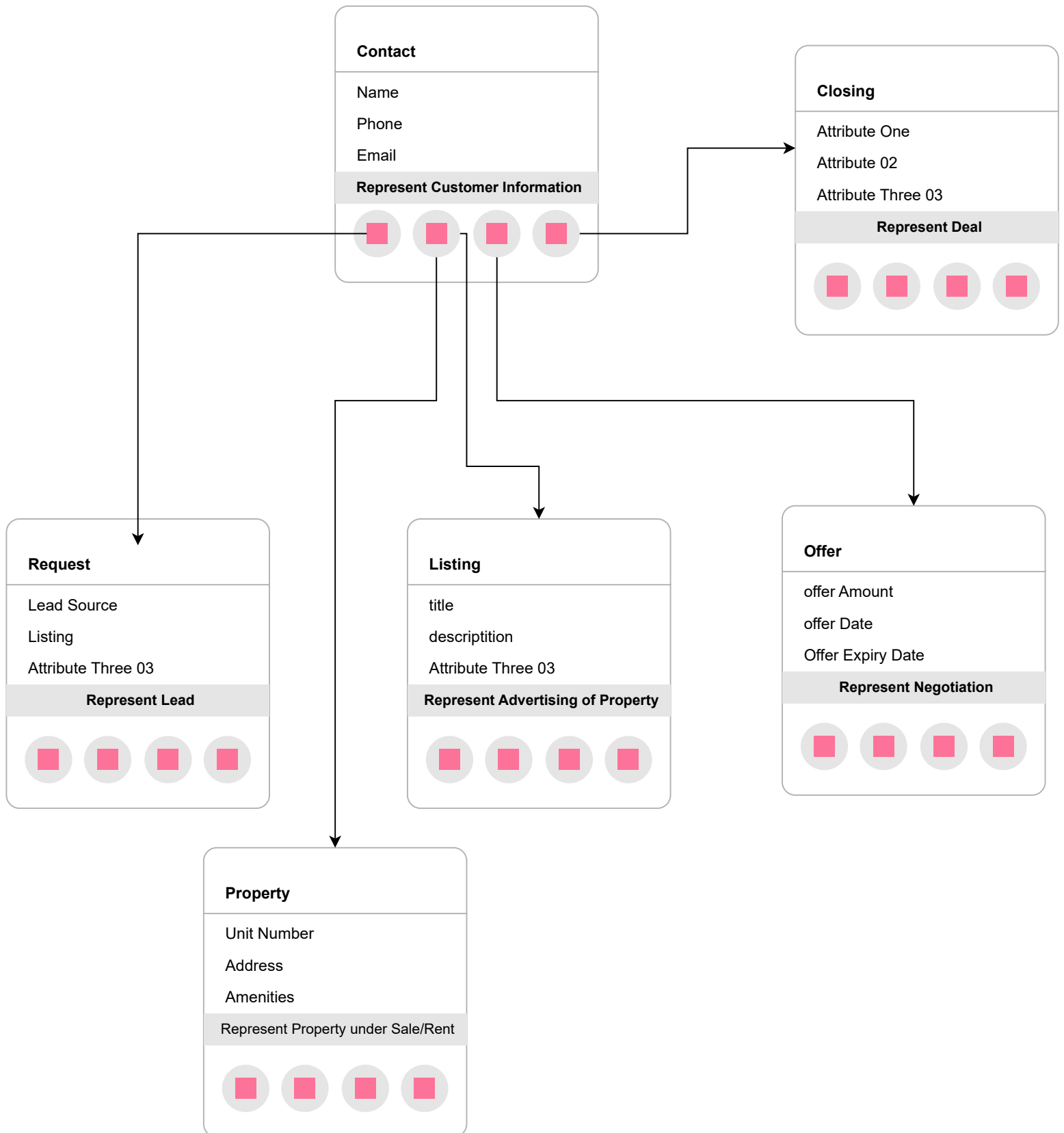
### Responsibilities

Ensure that the Leads are tacked Properly

Have Mistry shopper initiative to track Lead Leakage

## Significant Objects

Propertybase Significant Objects



List Views

List View can show Maximum 2000 Records So users will able to See only  
Only 200 Records are visible in the Kanban View  
Maximum 10 Filters are possible

Export

List View can show Maximum 2000 Records So users will able to See only  
Only 200 Records are visible in the Kanban View

Reports and Dashboard

User can show Maximum 2000 Records So users will able to See only  
User can have only 7 Dynamic Reports

Mobile and Handled Devices

Record Owner edit is not Possible in the case of Mobile