

**REALSYS-CRM**

A powerful Real Estate CRM to know all ongoing activity at a glance like site visits, bookings, registrations, loans, payment schedules, executive-agents, properties as data-bank with AI analysis & many more.

**CUSTOMIZABLE CRM FOR REAL ESTATE BUSINESS****MODULES**

1. Lead Module
2. Visit Module
3. Booking Module
4. Loan Module
5. Registration Module
6. Agent Module
7. Project Module
8. User Module

**OPERATION CAN BE PERFORM****1 PROPERTY WIZARD**

Add Property details & know Property Stock  
Know your property stock, leads, business expected & more  
Send property details via email

**2 USERS/EXECUTIVE WITH MIS**

Monitor sales person wise targets  
Monitor your top & worst sales people & real estate brokers  
Complete sales target management

**3 VISITORS & SCHEDULE**

Track site visits: Past & Scheduled  
Know which sales person is closing more deals  
Know how many are expected to close

**4 SALES, PLANNING & FORECAST ANALYSIS**

Forecast sales weekly, monthly, quarterly & yearly  
Real time picture of revenue  
Quickly see how your team is performing  
Know who would buy and when

**5 ACTIVITY & FOLLOW-UP WIZARDS**

Never miss to follow up leads  
Know every detail of follow ups  
Reminders to leads and sales persons via email, phone & sms  
Help sales people & real estate brokers become productive

**6 LEADS/PROSPECTS ANALYSIS**

Prioritise & Focus on important leads  
Transform the way you close leads  
Focus on the right customers & priorities



## 7 MIS & SALES PROMOTION

- Increase sales performance
- Analyse your real estate sales data in different ways
- Manage what matters in your real estate business

## 8 OUTSTANDING & COLLECTIONS

- Send payment reminders
- Payment reminders to clients & sales people via sms & email
- Know how much revenue would you generate

## 9 SMS/EMAILS

- Market via sms & email to leads & clients
- Send automated emails & sms
- Stay connected & promote existing & upcoming projects
- Access reports from any device

## 10 REMINDER SYSTEM FOR SALES & COLLECTION TO SALES-EXECUTIVES

- Make informed Business decisions
- Payment reminders to clients & sales people via sms & email
- Know how much revenue would you generate

## 11 UI DESIGN FOR MULTIPLE DEVICE/USERS

- Use CRM on Desktop, Tablet & Phone
- Access real-time sales & customer data anywhere
- Dashboard & Reports
- Get a real-time picture of your business at a glance
- Access reports from any device

## OVERVIEW

### 1 Sales Target

- **Set, track and closely observe sales targets for your Real Estate business and sales people respectively.**
- **Monitor your revenue growth.**
- **Know & administer the sales performance of your business and sales teams.**

You can set sales targets of your Real Estate Company revenue-wise for any desired duration by filling in the current form fields.

You can set sales person wise targets for any duration. Eg: Month, quarter, half-year, year, etc.

You can know the sales targets achieved & balance with the precise count of days left for period completion.

You can revise & delete a respective sales target in the Revenue-wise Sales Target & Sales Person Wise Sales Target modules.

### 2 Lead Management

- **Add multiple leads.**
- **See the status of each lead follow-up and prioritize leads to close more deals quicker.**
- **Categorize and allocate leads as per your desire.**

You can feed-in the basic details of the lead enquiry as per current form fields given.

You can specify the source of the lead & details of the lead's property enquiry.



You can allocate leads manually or automatically.

You can classify leads and add tags.

You can prioritize leads and also add remarks.

You can add leads straight from your website into the Real Estate CRM system and auto allocate enquiries to respective sales people in a round-robin structure.

You can specify the expected visit date.

You can have customized tags according to leads.

You can have custom made stages and priorities.

You can view leads allocated to sales people product / service wise.

You can allot leads to sales people flat-wise or project-wise.

You can view leads allocated to sales people & agents project wise or flat wise.

You can know the visits postponed by the lead.

You can import leads via excel sheets.

You can see the lead data imported through the excel sheets.

### 3 Follow-Up

- **Make follow-up calls, emails & sms with leads.**
- **Schedule follow-up calls, emails, sms and site visits with leads.**
- **Set reminders for follow-ups, calls and site visits.**

You can select a date & time to schedule follow-up calls with leads and clients.

You can add reasons and allocate tags to calls. Eg: important, very important, etc.

You can get an sms or email alerts for calls so that you or your sales people / Real Estate agents never miss to follow-up with leads and clients.

You can also allot calls to sales people under you.

You can view your sales employees' & agents' today's calls, pending calls, scheduled calls, calls done.

You can update what's discussed on call and delete calls.

You can update the call status. E.g: Did not pick-up, busy, not reachable, switched off, not interested, in a meeting, call back after sometime, etc.

You can streamline a call / meeting / email as discussed over the call.

You can keep a tab on all of the calls made by sales people / agents to know what's exactly going on in sales follow-up.

### 4 Booking

- **Add bookings of flats / shops.**
- **Know your prospective business via the bookings done.**

You can add the agreement value, Loan amount & bank details.

You can add the expected disbursement date & loan approval status. Eg: Approved, rejected, etc.

You can add particulars of the loan applicant by filling in the checklist given.

You can mark & attach the required document proof for loan processing by filling-up the given checklist.

You can select a category & add relevant remarks.

You can view the client, property details and loan valuation information.

You can view the Quotation, Agency / Bank details & expected loan disbursement.

You can know the approval status of the required documents.

You can get a categorized view of Registrations Overdue, Registrations, Bookings Overdue, Bookings & All Loans.



## 5 Registrations

- **Know all the registrations done.**
- **Track payments & send reminders to clients.**

You can add registrations & flat details by filling in the current form fields.

You can add basic details of the Flat Purchaser and their PAN Card no.

You can specify the Project name & flat area details.

You can add the payment amount, loan amount, Registration, society & other additional charges.

You can add / edit a payment schedule and specify type of charges eg: Down payment, Agreement amount, etc.

You can view all the payment schedules for every client.

You can view all the booking details and the payment paid / receivable.

You can get a categorized view of all the Pending Registrations, Scheduled Registrations, Registrations Done & Registrations Overdue.

## 6 Receipts

- **Generate receipts for the payments received from your clients.**

You can do a quick search of receipts created.

You can create receipts for payments received from clients.

You can specify the mode of payment i.e. Cash, cheque, DD, Bank Transfer, etc.

You can add the amount details and description.

You can view all the receipts generated with their verification details.

## 7 Loans

- **Handle loan processing for several property buyers.**
- **Know your monetary benefits from loan procedures.**

You can add the agreement value, Loan amount & bank details.

You can add the expected disbursement date & loan approval status. Eg: Approved, rejected, etc.

You can add particulars of the loan applicant by filling in the checklist given.

You can mark & attach the required document proof for loan processing by filling-up the given checklist.

You can select a category & add relevant remarks.

You can view the client, property details and loan valuation information.

You can view the Quotation, Agency / Bank details & expected loan disbursement.

You can know the approval status of the required documents.

You can get a categorized view of Registrations Overdue, Registrations, Bookings Overdue, Bookings & All Loans.

## 8 Quotations

- **Create and send multiple quotations. Users can share quotations with other users in the CRM**
- **Know the quotation status; add closing dates, save versions and payment collection details.**

You can create winning quotations in 3 quick steps by adding the flat / shop details & specifications in the current fields.

You can quote the pricing and specifications for multiple flats / shops by selecting the respective fields.

You can add terms & conditions to quotations, add taxes, tags & any extra notes if needed.

You can view all the quotations sent, know their policy details, expiry dates and status eg: approved, negotiating, etc.

You can view the sales forecast by adding expected close dates to quotations.



## 9 Clients

- **You can add contact details of clients.**
- **Assign, categorize, and communicate seamlessly with your clients via calls, emails and sms.**

View basic details of the Client & the respective flat purchased.

You can add & view the respective payable flat amount, loan details and other additional charges like VAT, Service Tax, etc.

You can assign, categorize, call, send & schedule emails and SMS with your clients.

Import your existing client contact data and importing details.

You can view all your clients' purchase details with their payments received & due.

## 10 Projects

- **Add & regulate sales relevant aspects of projects.**
- **Feed-in their specifications, flat & shop capacity, etc.**
- **Assign sales people & agents for respective projects.**

You can add details of multiple projects.

You can give a Project Code, Construction Start date & end date and the dates to mark the start and end of the selling period.

You can add the project details, building specifications and highlights.

You can attach Images of the project.

You can specify the Sq. ft Area, select respective Builder & add the Project Selling Rate.

You can add taxes and additional charges for respective projects.

You can assign Sales people for Projects.

You can specify agent incentives.

You can instantly know the Project bookings, flats available & average selling rates for buildings in all your projects.

You can view the received & balance payments of various projects.

## 11 Flats

- **Feed-in numerous flats & their details.**
- **Allocate sales people & agents for flats of respective buildings.**
- **Know the flat bookings & progress status.**

You can add specifications for multiple flats including their location details.

You can specify the project and building details for each flat.

You can give the Purchase Rate & Minimum Selling Rates with effective dates.

You can mention the flat description, carpet area, ownership type, etc. by filling-in the given checklist.

You can perform a quick search to find a particular flat added in the CRM system.

You can view all the flats, their project and building information along with the necessary details.

You can give specifications for multiple shops with their location details.

You can add the project and building specifications for each shop.

You can add the shop no., description, Internal carpet area, Sellable area, ownership type, etc. by filling-in the given checklist.

You can do a quick search to find a particular shop added in the Real Estate CRM system.

You can view all the shops, their shop no., project and building information and area details along with the required details.



## 12 Agents

- **Add & manage multiple agents & their respective details.**
- **Specify & manage their commissions & payments.**
- **Spot your best & worst performing agents.**

You can add basic details of multiple Agents.

You can add the company details of the agent & nature of the business.

You can specify agency details & commission for multiple agents.

You can add the Bank & account details of the Agent for commission transfers.

You can attach scanned copies of cheques & documents for commission payments.

You can view every agent's details and know their Sales Team Manager.

You can know agents' Commission Type & Commissions paid & payable.

## 13 Builders

- **Add details of multiple builders.**
- **Know the roles & responsibilities of each builder.**

You can add basic details of multiple Builders with their company name, designation by filling up the current form fields.

You can categorize Builders, add remarks and additional information.

You can view details of all Builders and know the Tags assigned to them.

## 14 Commissions

- **Bifurcate agent & sales employee commissions / incentives respectively.**
- **Know the pay dates & commissions / incentives to be paid accordingly.**

You can categorize Sales Employees & Agents.

You can add commissions for Agents and incentive details for Sales Employees.

You can view all the commission & incentive details of Sales team members & know the incentives / commissions paid.

You can get a categorized view of Agents' commissions and Sales peoples' incentives.

You can Pay Commissions / Incentives by using the Action button.

## 15 Commission Due

- **Stay updated about the commissions due for agents.**
- **Generate invoices for the same.**

You can view the Commissions due for Sales employees & agents.

You can know the duration for which the Commission payment is due.

You can generate an invoice by using the action button.

## 16 Invoices

- **Create invoices for respective payments.**

You can view the Receivable Invoice, Paid Invoice, All Invoices & Builder wise Invoice.

You can know the Invoice details, property, amount for which the Invoice is raised and days passed.

You can instantly know the date of payment received.

You can process payments using the action button.



### 17 Calendars

- **Serves as a calendar.**
- **Let's you mark important dates relevant to your business, employees, leads and clients.**

You can see all your critical tasks & important dates regarding your Real Estate company, sales employees, leads and clients.

You can view all the tasks, calls, SMS, emails scheduled in your calendar.

You can upgrade tasks, calls, SMS, emails scheduled in your calendar.

### 18 Company

- **Add and manage your company and branch details, save and know basic contact details.**
- **Add, modify and remove contact details & designations of employees according to departments.**

You can add your Real Estate Company's details with the branch, department and designation details.

You can access, change and remove your company's basic information with the branch, department and designation details.

### 19 Contacts/Accounts

- **Store, modify and delete contact details of clients.**
- **Save important dates regarding products and services purchased.**
- **Set reminders for payments, etc.**

You can import your existing contacts.

You can add numerous contact details of clients.

You can add birth dates, anniversaries, remarks and other information about respective contacts.

You can add & view all the contacts with their basic details.

You can categorize contacts and send sms & emails.