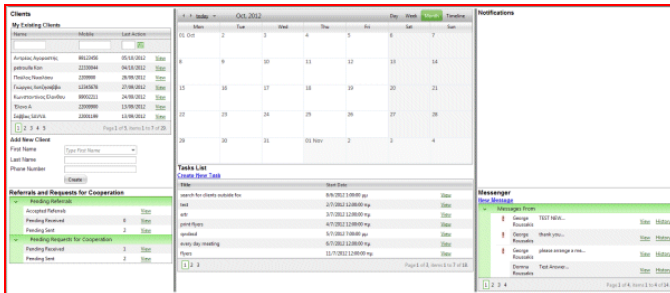CRM Estate is a Customer Relationship Management System specifically designed for Real Estate Agents. A Web based system allowing users to have access through a web browser. It covers all the required functionality of an estate agent from the time a prospective customer contacts the organization with a specific request, up to the finalization of such request. Through a single screen, every associate can execute almost all his/hers daily functions. Efficient search facilities reach the required information through powerful queries. New development technologies and tools allow users to easily access and maintain system information.

Main associate screen with main components

The system allows a Real Estate Agency to have an unlimited number of offices with an unlimited number of sales associates in every office. Users are assigned a specific "Role" giving them the capability to have access to authorized information only. For example, Sales Associates can have access to their own Clients, to their Client Requests and their own Request Actions only. The system supports the following "Roles":

- Head Office Manager
- Head Office Secretary
- Office Manager
- Office Secretary
- Sales Associate.

Client Form with Requests and Actions

The system is fully integrated with PS-WebEstate, our Web Based Content Management System for Real Estate Agents, but can easily adapt to any other Estate Agents system by readjusting the property information retrieval module.

The Information structure is based on a Client which can place any number of "Requests" (Buyer Request, Tenant Request, Seller Request, Landlord Request). Each Client "Request" can have any number of related "Actions" created either by sales associates or created automatically by the system. "Request" actions depend on client request type and among others, include the following:
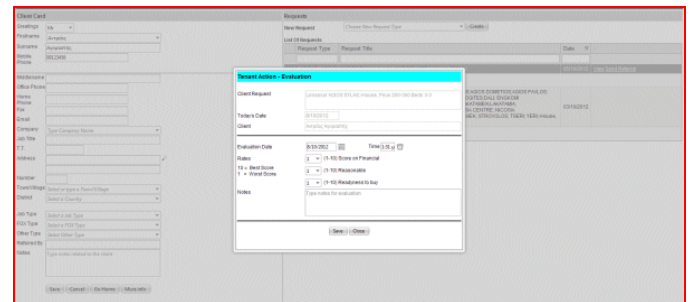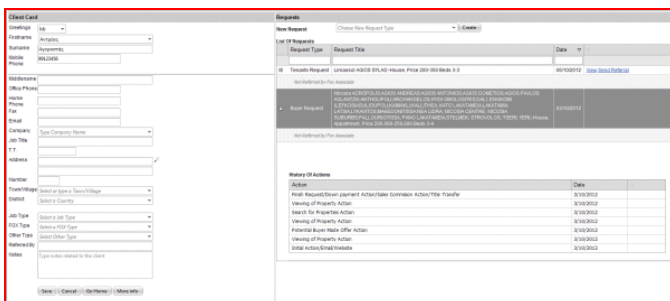
- Search for Properties
- Evaluation of a Buyer, Tenant, Seller, Landlord
- Inform other associates about a client request
- Property Viewing
- Offers Made
- Telephone Calls
- Meetings
- Emails
- Down Payments
- Request Completion
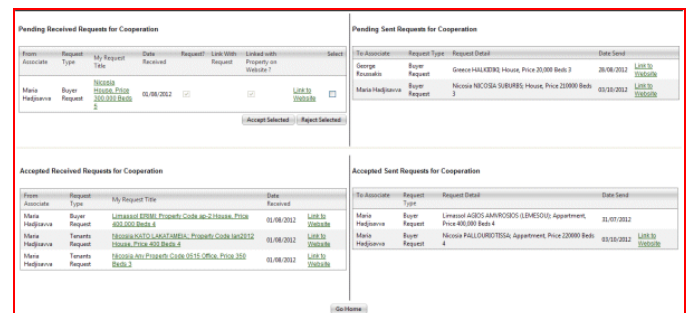

Request Form with an open Action (Tenant Evaluation)

Referrals and Request for Cooperation

The system includes the functionality for recording and maintaining referrals in cases that one sales associate passes a client request to another sales agent either in the same office or in another organization's office. In addition it supports requests for cooperation from one associate to another again regarding a client request. Referrals and Requests for Cooperation affect each party commission during a Client Request finalization

Referrals Screen Pending Received/Sent, Accepted Received/Sent referrals

Calendar

It supports a separate "Calendar" for each Sale Associate allowing for the creation of a link between a specific client request action and a calendar entry. The "Calendar" module can issue automatically alert notifications and reminders for upcoming events. Customization can be provided by system administrators.
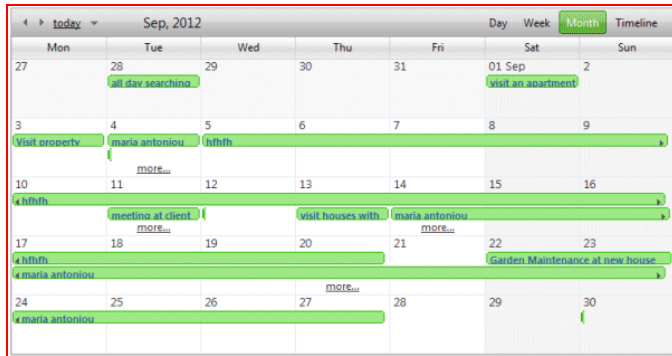
Sales Associate Calendar

Tasks

Every sales associate can create any number of personal tasks either related to a Client and/or a Client Request or not. The function follows-up the progress of every task up to completion.
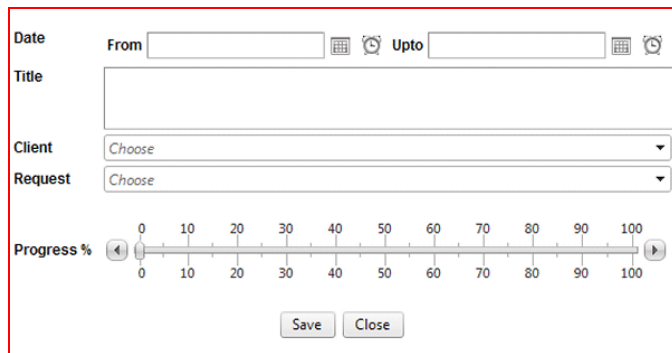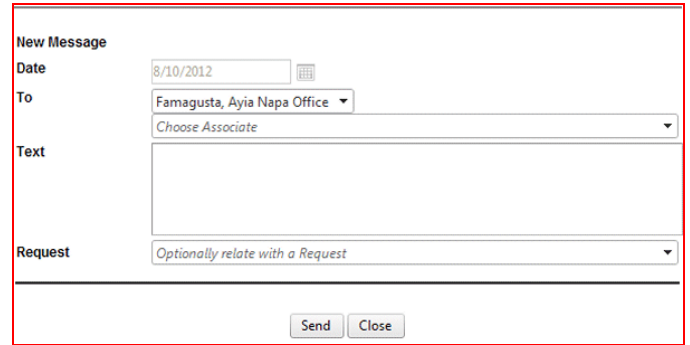

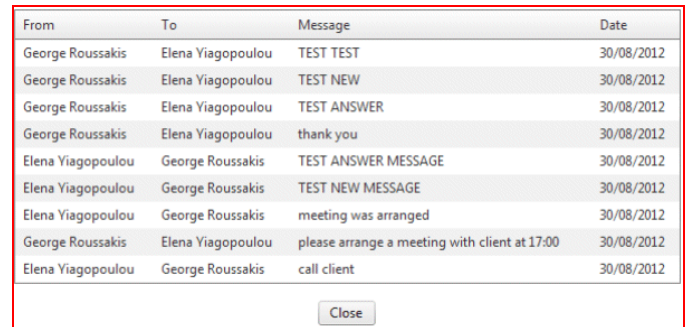Sales Associates Tasks

Messenger

The embedded "Messenger" module allows users to exchange emails. Messages can be sent to any other associate, office or globally to the organization depending on the sender "role". Users can view the complete correspondence with another user instantly.

Document Management

Embedded document module allowing users to upload multiple documents and relate them with a Client or a Client Request or an Action.

New message screen

Messages history screen

Notifications

Depending to the organization's own configuration, the system can send automatically notifications to sales associates for every system event. Administrators can define which associate will be notified, the time of such notification, the frequency of such notification, etc.

Main Features

- Web Enabled
- Multi Office support
- Unlimited Users
- Personal Calendar
- Client Request Referrals
- Requests for Cooperation
- Commission for Offices and Associates
- Embedded Calendar
- Associates Tasks Maintenance
- Embedded Messenger
- Notifications capability
- Extended Security
- Journal Log

Technical Specification

Operating System	MS Windows 2003/2008
Database	MS SQL 2005/2008
Web Server	MS IIS 6/7/7.5
Framework	.NET 4.0
Web Browser	MS Internet Explorer