

Netiks 360RealEstate

Sustaining customer
relationships

 Microsoft Dynamics CRM

Sustaining Customer Relationships

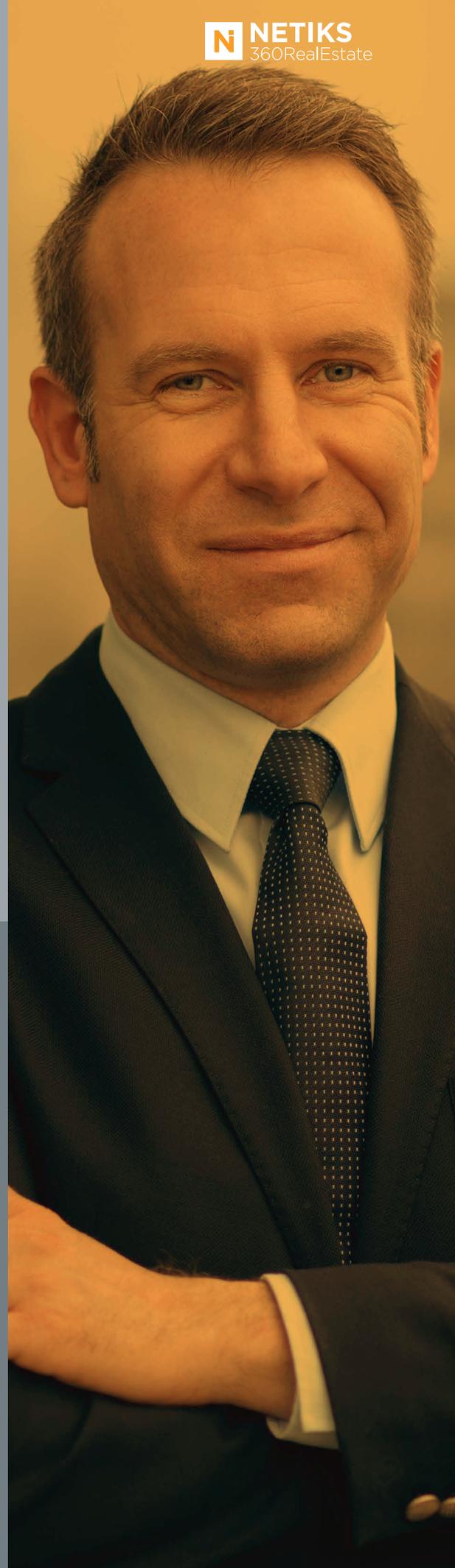
With ever-increasing competition, the Real Estate industry is finding difficulty in retaining their existing clients or attracting new ones, where things aren't as easy as they used to be.

Netiks 360RealEstate provides the needed tools for the Real Estate Industry to track the sales process, to know their customers, to sustain customer interaction and to provide real-time views, on goals and revenues, to top management .

Netiks 360RealEstate is a Microsoft Dynamics CRM solution specifically designed to sustain customer relationships, leading to an increase in customer satisfaction and loyalty.

This is realized through various features in the Property, Budget, Customer Service, Contract and Marketing & Sales modules.

The daily visibility on revenue, relationship with customers, 360° view of properties, simplification of the contract and the marketing & sales process, automatically generate an increase in the Real Estate return on investment.



The success of today's real estate organizations depends on accurate data that provide deep visibility into past and future performances and enhance decision-making on an ongoing basis.

Netiks 360RealEstate will provide you with the full solution to meet your goals.

01 Keeping an Eye on Details Through a 360° Property View

Property management gives property owners a complete view of activity related to each property, including photos, sales activities, tasks and related documents. This view will help property owners stay entailed in day-to-day follow-up.

02 Budgeting and Forecasting Revenue

Budget expenses and proceeds' management provides the ability to create and maintain budgets and forecasts revenue for any Property. Both Expenses and Proceeds' budgets are tracked under CRM. Forecasts are based on the allocated budget and the actual revenue throughout the year.

03 Field Inspection Service Capabilities

With the Mobile Inspection Application, the Real Estate industry may improve service onsite visits, ensure measured and consistent outcomes and deliver a positive customer experience.

04 Know your Customer

Smart Notifications Automation and 360° Customer View will provide powerful tools to know your customers and empower the relationship with them.

05 Manage the Client Contract in CRM

Contract Management in CRM will follow the very first step in building the contract from pricelists, discounts, contract types, system invoices generation to payments notifications and penalty calculations. Having Contract Management in CRM will empower the 360° View of the Customer as well.

06 Set and Monitor Sales Activity

Sales Management in our **360RealEstate** solution provides the needed tools for sales teams to execute the sales process through the opportunities and activities in CRM. Our **360RealEstate** solution also provides the sales managers with tools to set sales goals and follow-up on year-to-date progress. The rapid reporting and dashboards help sales teams to meet deadlines and gain valuable insights to effectively meet goals and increase industry revenues.

07 Enhance Communication with All Parties

You may enhance the communication will all parties by connecting the CRM to a Portal. The portal may be accessed by: Brokers, Customers, Stakeholders, and Potential Leads. Our **360RealEstate** solution provides a portal for any party to check related information like communication history, tasks, contracts, pending payments and the ability to raise complaints.

01 Property Management

The property management process covers the management of properties, facilities, equipment, services and any other component. The aim is to build a complete inventory of properties owned or managed by Real Estate Industry.

The screenshot shows the Microsoft Dynamics CRM interface for a property named "Astoria Residence". The top navigation bar includes "Microsoft Dynamics CRM", "REAL ESTATE", "Properties", and "Astoria Residen..". Below the navigation bar, there are action buttons: "SAVE", "NEW", "DELETE", and "...".

The main content area is divided into several sections:

- PROPERTY : INFORMATION**: Displays the property name "Astoria Residence" and key metrics:
 - Commercial Status: Owned
 - Occupancy Status: --
 - Revenue (YTD): \$30,000.00
 - Expense (YTD): \$15,000.00
- Property Information**:
 - GENERAL INFORMATION**:
 - Reference No. *: 12605
 - Name *: Astoria Residence
 - Parent Property: --
 - Type *: Residential Building
 - Classification: Residential
 - Occupancy Status: --
 - ADDRESS**:
 - Country: Lebanon
 - Governorate: Beirut
 - City: Manara
 - Street: St. 104
 - Latitude: 33.8547
 - Longitude: 35.8623
 - A map showing the property location with a red pin.
- Sub-Properties**:
 - RELATED SUB-PROPERTIES LIST**:

Name ↑	Type	Classification	Commercial Status	Occupancy Status	Area (SQM)	Selling Price	Base Rent
Lot B1	Apartment	Residential	Under Negotiation	Vacant	450.00	\$350,000.00	\$700.00
Lot B2	Apartment	Residential	Reserved (Sale)	Vacant	450.00	\$350,000.00	\$700.00
Lot B3	Apartment	Residential	Sold	Occupied	350.00	\$290,000.00	\$550.00
Lot G1	Shop	Commercial	Rented	Occupied	100.00	\$150,000.00	\$700.00
Lot G2	Shop	Commercial	Available for Rent	Vacant	100.00	\$150,000.00	\$700.00

The bottom of the interface shows "1 - 2 of 2" and "Page 1". The status bar at the bottom indicates "Active".

Features

- 360° View of property information
- Complete view of related activities
- Define services and components under each property
- Show connections with related parties (Contractors, Customer, Broker, etc...)
- Integration with Bing / Google Maps to show property location
- Manage property documents locations (CRM, OneDrive, or SharePoint).
Track approval history under documents.

02 Budget, Expenses & Proceeds Management

The system allows the property manager to prepare a budget and to track it against proceeds and expenses. Further, proceeds and expenses will be categorized to enable deeper analysis of the operations.

Microsoft Dynamics CRM | REAL ESTATE | Properties | Astoria Residen..

SAVE + NEW DELETE ...

PROPERTY : INFORMATION
Astoria Residence

Commercial Status: Owned | Occupancy Status: -- | Revenue (YTD): \$30,000.00 | Expense (YTD): \$15,000.00

Budget, Expenses, and Proceeds

PLANNED BUDGET

Revenue (YTD) \$30,000.00

Year	Allocated Budget	Expected Expenses	Expected Proceeds
2016	\$70,000.00	\$90,000.00	\$15,000.00
2015	\$50,000.00	\$70,000.00	\$20,000.00
2014	\$50,000.00	\$40,000.00	\$10,000.00

1 - 5 of 5 | Page 1

EXPENSES

Actual Expenses (YTD) \$15,000.00

Year	Category	Expected Expenses	Actual Expenses
2016	Electricity	\$90,000.00	\$15,000.00
2016	Brokerage Fees	\$70,000.00	\$20,000.00
2016	Paintings	\$40,000.00	\$10,000.00

1 - 5 of 5 | Page 1

Planned Budget vs. Revenue (YTD)

Year	Allocated Budget	Actual Budget
2016	\$70,000.00	\$30,000.00
2015	\$50,000.00	\$60,000.00
2014	\$50,000.00	\$40,000.00
2013	\$50,000.00	\$60,000.00

Expected Expenses vs. Actual Expenses (YTD)

Year	Expected Expenses	Actual Expenses (YTD)
2016	\$90,000.00	\$15,000.00
2015	\$70,000.00	\$20,000.00
2014	\$40,000.00	\$10,000.00
2013	\$40,000.00	\$10,000.00

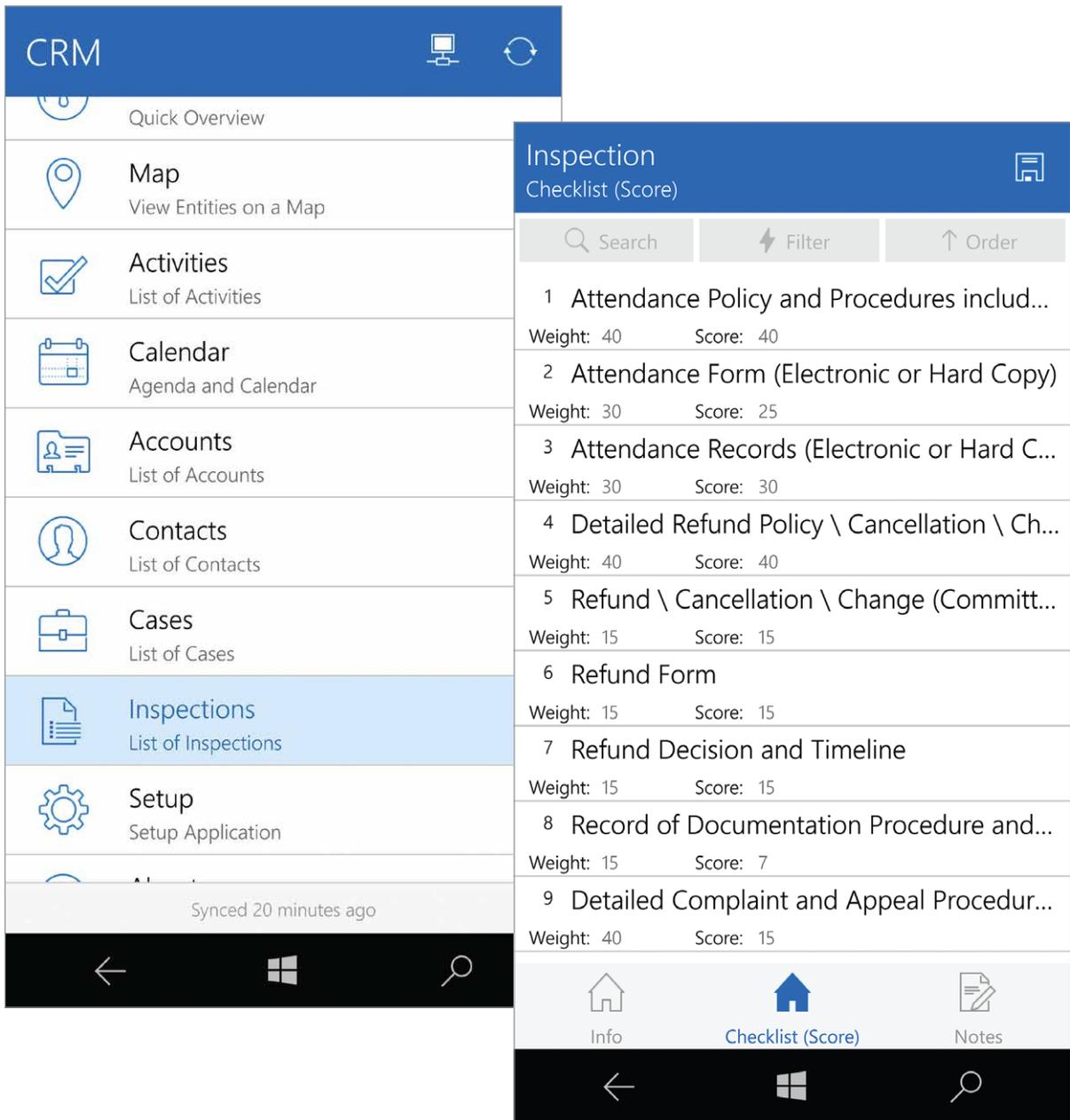
Active

Features

- Allocate a yearly budget for each property
- Track year-to-date revenue for each property
- Visualize past and future revenue using reports and dashboards
- Integration with ERP / Payment systems to track expenses and proceeds
- Add expenses and proceeds manually to the system.

03 Inspection Management

Use inspection predefined criteria to set grades, add comments, capture property pictures and add signature onsite using a Mobile Application. It helps organizations improve service delivery, ensure measured and consistent outcomes and deliver a positive customer experience.



Features

- Access inventory, property and tasks data anywhere
- Use a mobile application to complete inspection tasks: add inspection results, take onsite photos and capture client signature
- Use a Map to locate the nearest site to visit
- Keep the Manager updated with onsite work.

04 Customer Management

The Real Estate product provides a 360° view over the Brokers, Contractors, Customers, Engineers, Owners, Tenants, Suppliers and Service Providers.

The screenshot displays the Microsoft Dynamics CRM interface for a contact named Lama Abou Adal. The top navigation bar shows 'Microsoft Dynamics CRM', 'REAL ESTATE', 'Contacts', and 'Lama Abou A...'. Below the navigation bar, there are icons for 'SAVE', '+ NEW', 'DELETE', and '...', along with up, down, and refresh icons.

The contact's profile picture is shown next to the text 'CONTACT : INFORMATION' and 'Lama Abou Adal'. To the right, it indicates 'Created On 12/06/2011' and 'Owner * Lina Nader'.

The main content area is divided into several sections:

- Contact Information:**
 - GENERAL INFORMATION:**
 - Full Name (En) *: Lama Abou Adal
 - Full Name (Ar) +: لاما أبو عدل
 - Parent Account: --
 - Referred by +: Elias Shamaa
 - Email Address *: Lama.AbouAdal@gmail.com
 - Email Address (2): --
 - Mobile Phone*: 00961 (3) 610 622
 - Business Phone +: 00961 (4) 780 087
 - ADDRESS:**
 - Country: Lebanon
 - Governorate: Beirut
 - City: Manara
 - Street: --
 - Building: Astoria Building
 - Floor: 16th floor
- SMART NOTIFICATIONS:**
 - Last updated on 12/06/2016 8:00 am
 - 2 due payments are not paid yet.
 - Raised 2 complaints on the Electricity Motor Service but still not resolved.
 - Take her feedback on the new garden added to Astoria Building
- CONNECTIONS:**

Connected To	Role (To)	Main Phone	E-mail
Lot B1 - 16th Floor	Owner		
Lot B1 - 16th Floor	Resident		

At the bottom of the interface, it shows 'Active' and a page indicator '1 - 1 of 1' with 'Page 1'.

Features

- Know you customer: contact details, related contracts, related payment, related complaints, etc...
- Smart Notifications to alert the CRM Agents about important information for better decisions on-time
- Configure rules to alert notifications accordingly.

05 Contract Management

The contract management process will cover the management of agreements, contracts and their related invoices. Penalties calculations and Reminders are also set based on the due payments.

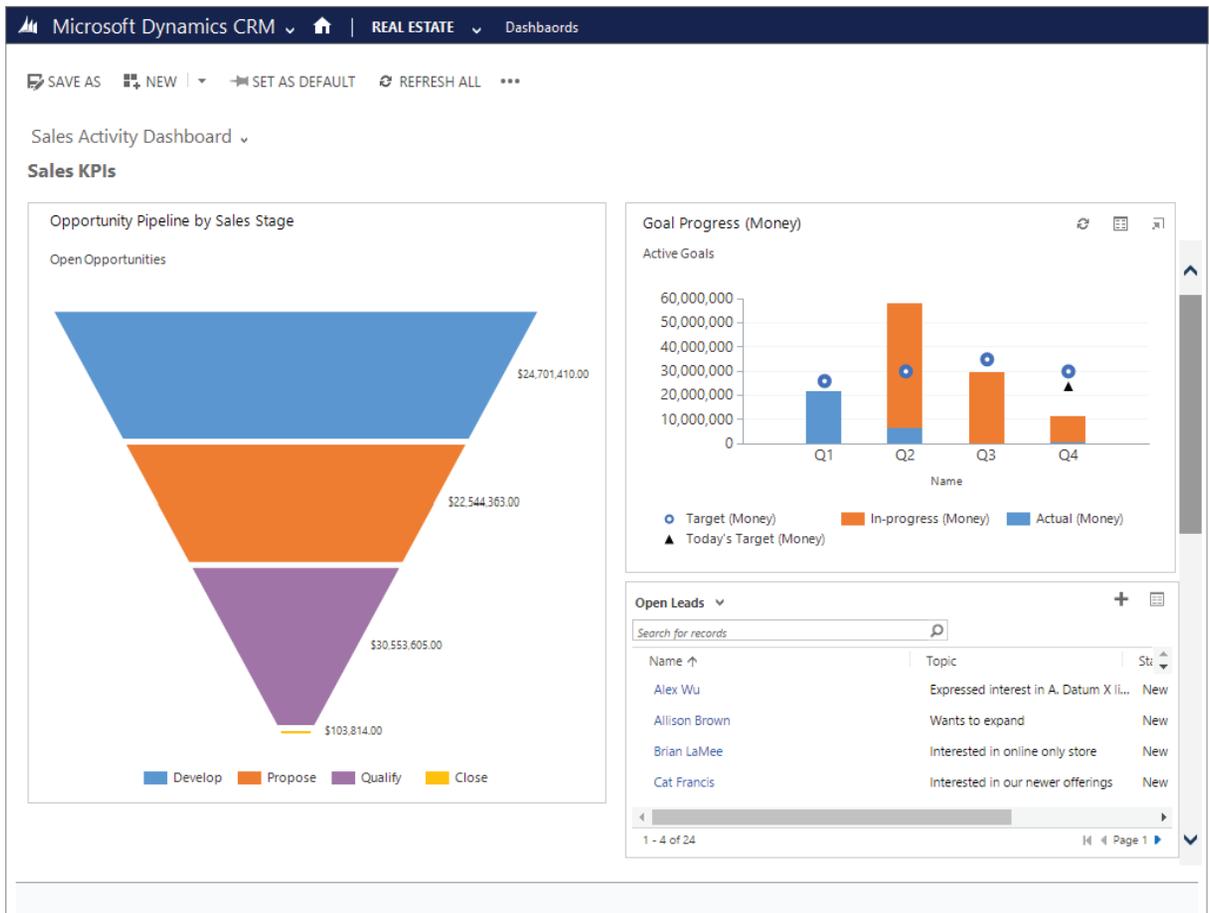
The screenshot displays the Microsoft Dynamics CRM interface for a contract. The top navigation bar shows 'Microsoft Dynamics CRM' and 'REAL ESTATE'. The main header includes 'Contracts' and 'CONT - 0036'. Below the header, there are action buttons: 'SAVE', '+ NEW', 'DELETE', and '...'. The contract information section shows 'CONTRACT : INFORMATION' with 'CONT - 0036 - 1253' as the contract ID. Other details include 'Type: Service', 'Total Amount: \$13,500.00', 'Created On: 12/06/2011', and 'Owner: Lina Nader'. The 'Contract Information' section is divided into 'SUMMARY' and 'CONTRACT PRODUCTS'. The 'SUMMARY' section lists fields like Contract ID, Customer (Kfoury Engineering & Contrac), Contract Type (Service), Contract Start Date (01/01/2016), Contract End Date (01/01/2017), Payment Owner (Saradar Group), and Payment Frequency (Quarterly). The 'CONTRACT PRODUCTS' section shows a table with columns for Product, Price/unit, Qty., Discount (%), Total Amount, and Start Date. It lists 'Electric Implem..' and 'Plumping Instal..'. Below this is an 'Amount and Discount' summary table. The 'Invoices and Payments' section contains two tables: 'INVOICES' and 'PAYMENTS'. The 'INVOICES' table has columns for Invoice No., Amount, Related Property, Due Date, Status, and Created By. The 'PAYMENTS' table has columns for Payment No., Amount, Related Invoice, Paid On, and Created By. The interface also includes a sidebar on the right and a footer with 'Active'.

Features

- Manage sell, rent and service contracts in CRM
- Automatic / manual generation of invoices based on contract types
- Integration with the ERP payment system to set invoices as paid
- Automatic creation of customer and industry penalties
- Configure penalty rules under the system.

06 Sales Management

The Sales Process covers the sell/rent of properties through a systematic succession of phases, namely: Opportunities, Quotes, Orders and Invoices. CRM gives better visibility on the progress of the Sales Process.



Features

- Set sales goals and track real-time progress
- Provide reports and dashboards to check goals and revenue progress over the year(s)
- Track collaboration with brokers and stakeholders during the sales process
- Manage sales opportunities under CRM
- Manage and qualify leads
- Forecast future sales performance.

07 Portal

The below is a sample screen for a Portal linked to CRM information. Portal users may be: Partners, Brokers, Customers or Contractors. Each privileged user can check his related screens, such as: Contracts, Pending Payments, Property Progress, etc...

Features

- Provide different access layers under a portal
- Define tabs to show under a portal and access roles from CRM
- Store forum discussions under CRM
- Show events under a portal
- Raise complaints from CRM
- For privileged users, show invoices and pending payments
- For privileged users, show property progress
- For privileged users, show contract details
- Show history of communication activities with the Real Estate industry.



Innovate. Deliver. Delight.

Saïd Freiha Street
Farrania Building
Hazmieh Lebanon

P.O.Box 116-5034
Beirut Lebanon
F +961 5 956 659

T +961 5 957 759
E info@netiks.com
W www.netiks.com

f facebook.com/netiksint
l linkedin.com/company/netiks-international-sal
t twitter.com/NetiksInt