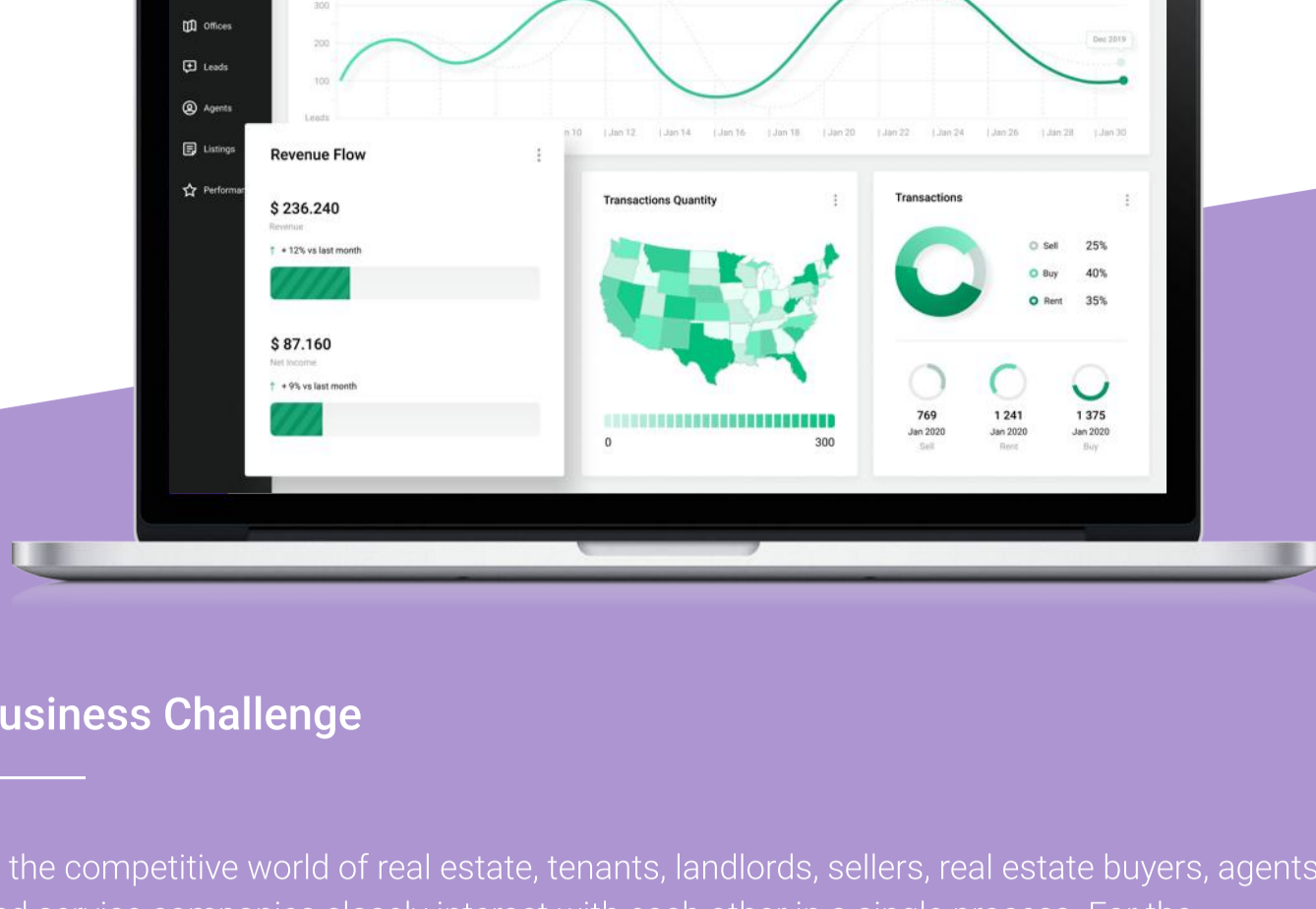


360° ERP System for Real Estate

XB Software created custom web-based full-featured ERP software for a real estate company with an in-built CRM module and a web portal to embrace all business processes and give them the best control and management.

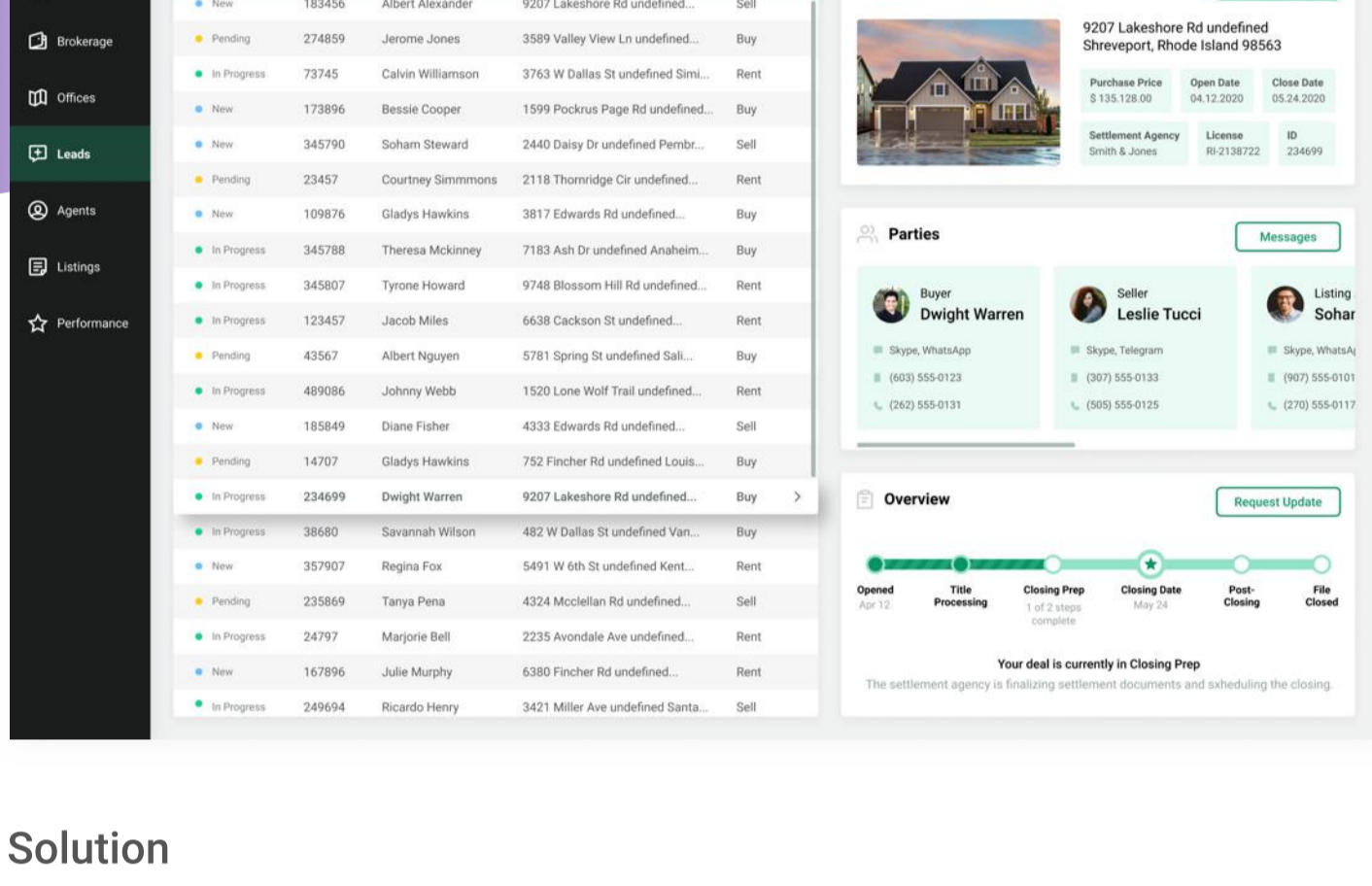


Business Challenge

In the competitive world of real estate, tenants, landlords, sellers, real estate buyers, agents, and service companies closely interact with each other in a single process. For the companies that organize this process and act as intermediaries, it is imperative for them to arrange seamless communication between participants and store information for the back office.

The client asked us to create an ERP for its real estate business that could:

- collect and manage information, organize its storage in the system and its flow between various departments within the real estate company.
- create customizable workflows to track and control leads from inception to sale to reduce client losses in the sales funnel.
- organize financial management, track, and manage human resources from comprehensive dashboards.
- empower interactions with clients.
- pay vendors automatically.
- improve staff productivity and increase the efficiency of all operations.
- make all decisions data-driven through Business Intelligence visualization in customizable dashboards.
- integrate third-party services to reduce information and time losses.
- implement comprehensive scheduling features for office and field staff.



Solution

The 360° ERP system developed from scratch by XB Software consists of 3 layers, conditionally divided for the client's service, staff, and executives. Clients (landlords, tenants, and service companies, etc.) start their journey with an official real estate company's web portal and a personal account, where depending on their role, they see different dashboards. All users can open standard dashboards such as Financial, Calendar and Scheduling, Notifications, and Communication for the highest quality service in one place. Others are available as necessary for each role:

- Landlords can add their property to the site's database and place requests for maintenance services.
- Tenants use their personal accounts to get the most relevant search results for rental housing filtered by various criteria and by location.
- Vendors see features such as service requests, submission notifications, information about the property, quality reports, and completion.
- Real estate buyers see newest listings, property details with history and neighbourhood description as well as the property price, and down payments, mortgage loan types and interest rates. They can choose a property by using different filters, save their searches, browse similar properties, contact the agent, or choose one to represent their interests and find what they need.
- Sellers can search for listing agents in their areas using different criteria. They can communicate with them, and monitor the state of sales or lettings.
- Real estate agents can create profiles and use them to present their portfolios.

The ERP system for real estate integrates all this information with a fully-featured CRM for seamless processes across all departments.

Advanced CRM Module

The customer told us that in the real estate world clients use too many communication channels to solve their tasks, which means that staff members in the company have to spend time switching between all kinds of messengers, social networks, email services. So, they might conduct a search, forward the information and then forget about the agreements because the information was not at hand. XB Software developed an [Advanced CRM](#) to address these business pain points. The CRM collects information from various sources, then organizes its storage and flow between members of the sales team, preventing losses on its journey through the sales funnel. Customer support and feedback are better organized now, so they take less time and the quality is higher. Scheduling is also one of the core features of the system. It's designed to be equally user-friendly for staff when they're scheduling appointments with customers, whether they're in the office or in the field.

360° ERP system

Our ERP for the real estate industry is designed to manage all business processes beginning with real estate listings and ending with payments and staff. Whatever is going on in your office and beyond (meetings with clients or search and management of vendors) an ERP real estate management system must track every activity over every minute of the day, transparently and comprehensively. It has two different levels for executives and staff members. Staff members carry out procedures and report the results, while executives set business rules and appoint new team members, control vendors, manage finances, and use [BI dashboards](#) for decision making. 360° ERP is designed for property portfolio management with API real estate listing integrations. The ERP system is available on mobile and is user-friendly for field staff. It can also integrate with employees' preferred work applications.

ERP modules can be added for specific Real Estate business tasks, including:

- management system for efficient work with vendors
- auction systems
- communication apps and chatbots
- virtual tours - AR, VR, video
- integrations with third-party specific apps and web-services

Applied Technologies

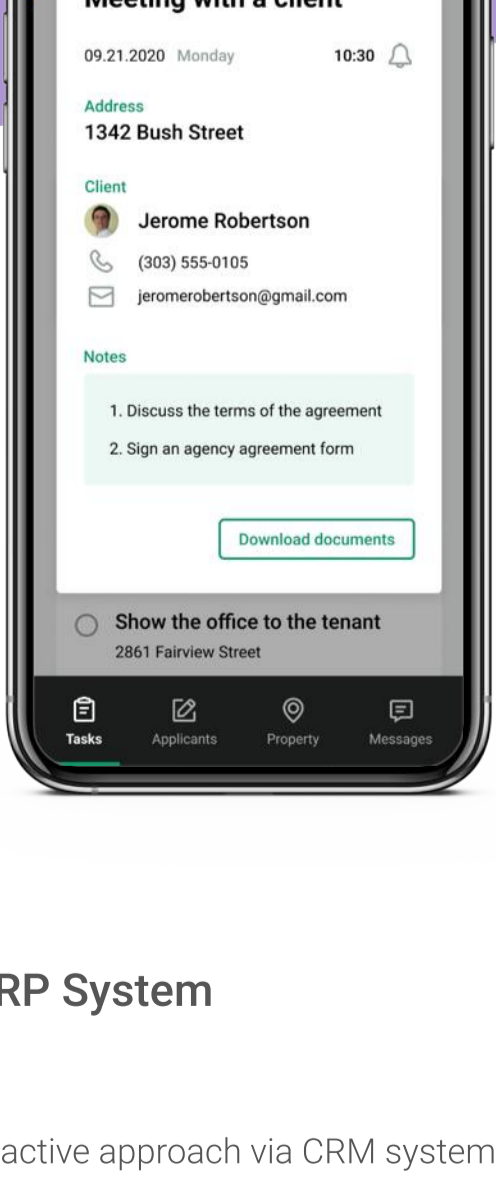
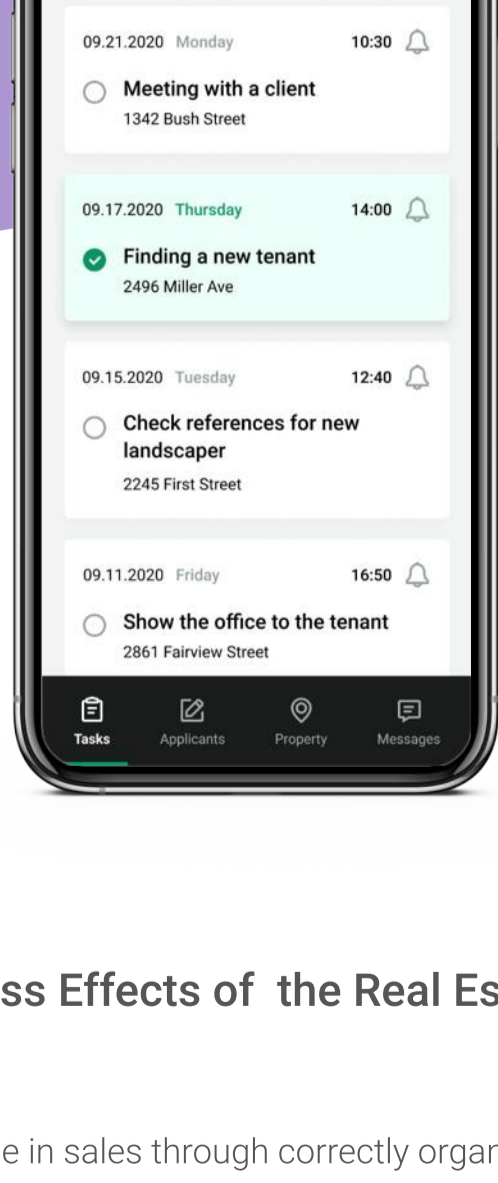


Duration

12 months

Estimated Working Hours

7600 hours



Business Effects of the Real Estate ERP System

- 15% rise in sales through correctly organized proactive approach via CRM system
- 13% rise in client satisfaction rate
- 11% increase in rate of work
- 100% processes automation and transparency
- 100% data-driven decisions for senior executives

XB Software team has a deep understanding of and expertise in the field of [software development for real estate](#).

Thanks for watching!

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