

# Real Estate

## Professional Services for Microsoft Dynamics CRM *Proof of Concept for Real Estate Business*

### BENEFITS SUMMARY:

- Incoming Calls answered via the Real Estate Business Solution
- Outgoing Calls made via the Real Estate Business Solution
- Using Microsoft Outlook Client for executing exclusive contracts with Sellers and Deals with Buyers
- Identifying locations for searching locations for Buyers via Maps integrated in the Business Solution
- Complete Real Estate functionality

### Business Challenge

Integrating information is just one critical element of any strong Customer Relationship Management system.

In Real Estate Business, there is a vast amount of business that occurs through telephone interaction with customers, partners, and colleagues that needs to be captured dynamically.

Without a streamlined approach to integrating the incoming and outgoing calls with the CRM application, time can be wasted, crucial data can be missed, and updating the CRM application with data from the call can be cumbersome. In addition, without integration between the phone and a CRM application, Sales Executives in the field can be isolated from critical information.

Additionally Real Estate Businesses need to identify their target properties and have the need to show the location of the properties to prospective customers and sellers and or agents.

### Solution

CapsLock has developed a Real Estate Solution using Microsoft Dynamics CRM 4.0. A manageable, easy to use, and affordable Real Estate Business Solution, system tailored to Real Estate Business needs. The Real Estate Solution is a web based solution that can be accessed through Microsoft Outlook or Internet Explorer.

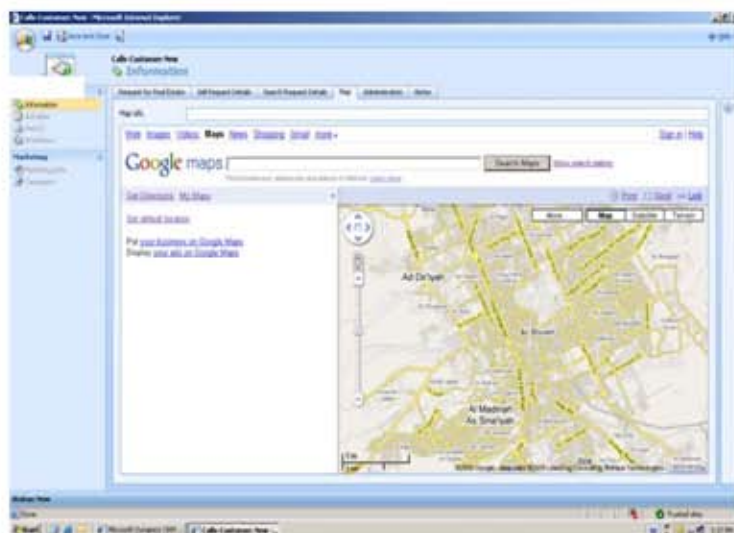
Microsoft CRM provides an intuitive way for Real Estate Business Team to offer quotes to customers (sellers and buyers and renters) and agents and to capture critical customer information. Through CRM CapsLock was able to tie-in all of Real Estate business requirements, like IVR, Maps etc. into one central location, vastly improving access to real time data.

The solution automatically equips workers with the exact data and form needed for each outgoing call whether it is initiated by clicking their screen or dialling their phone.

*The target area for Sell/Buy can be searched over any Map sites*

*The link to the actual Real Estate property can be saved against the prospect/customer record*

*Can be searched in MS CRM*





## Benefits

Buyer, Seller, Renter and Search records can be allocated to the concerned Sales Executive. They can be allocated even by location if the sales person owns the responsibility for a certain area

Automatic calling scripts are triggered based on the call type and services are routed based on the call type to the concerned service department

Activity reports are generated by Sales or Marketing executive as to his/her performance

Contracts or Deals can be concluded by a sales executive at customer sites, using the Real Estate Business Solution in offline mode and synchronizing it with the server when at office

With the IVR Connection the following is achieved

- The caller is identified using EIC Caller ID capability
- The caller's CRM data is obtained from the Dynamics CRM database
- A form containing the required CRM data for that caller is popped on the screen of the agent receiving the call
- A custom control tool bar appears on the screen, providing the options to take the call, place the call on hold, or send the call to voicemail.

For outgoing calls, automated, integrated and transparent workflows empower the end-user to focus entirely on the contact and the call rather than on what data is needed for the call and where to find it.

## FEATURES

**A complete Real Estate Business Suite, built over MS CRM that leverages the power and productivity of the Microsoft platform**

**Works the Way You Do:**  
Native Office and Outlook experience  
Full range of mobile solutions

**Works the Way Your Business Does:**  
Easily adapts to each company's needs  
Powerful workflow and analytics

**Works the Way Technology Should**  
Easily adapts to each company's needs  
Powerful workflow and analytics

**The Real Estate Business Solution is truly an application that is designed for the**  
"rubber to meet the road"

