CRM, CMS, and DMS with payment integration for a Leading Real Estate Firm

Create a Customer Relationship Management (CRM) solution with integration of Content and Document Management System

Client

The client is a real estate brokerage firm that focuses on coordinating with their clients to sell their assets at the highest possible price.

The client operates a Real Estate Alliance website. This website is a crowd-sourced database providing information to the commercial real estate industry ("CRE"). Property information, capital market (sales, debt and equity) and lease comps are available via the website. Originally founded in the 1980's, the alliance's website's database contains over 25 years of North American commercial real estate data.

Objective

The client required a Customer Relationship Management (CRM) system to store contacts, properties database with their sales, Lease Comparables & occupancy information.

The client wanted this CRM application to be as database and web application which will be open for outside world to make commercial property comparisons where the client can make money on user subscriptions.

The client needed a solution that integrates the following:

- User subscriptions

- Campaign support for Marketing team

- News and Announcements for users

- Document Management system to store all property related documents

Solution

Retransform developed the interactive and easy to use CRM system and web application. The solution included:

- Custom CRM application with more than 25000+ Subscribers, 80,000+ property information and continuously increasing.

- CRM stores Property extensions like 220,000 occupancy records, property Lease Comp, Sales information and more.

- Web application for the genuine buyers/sellers to use user friendly search to find their commercial property, view absorptions.

- Travel information from CRM to web application and vice versa in a real time.

- Subscription based user interface that can be enable/disable on any particular month.

- Compliant based Document Management System to store all the property related and/or personal documents that can be share with other users.

- Market Properties / office suites from website by making mailers and send it to selective people. Marketing team can track the campaign and take the necessary action which includes resend mailer, contact prospective Buyer / Tenant.

Services Performed

- Design Dynamics CRM application, move records from MS-Access desktop application.

- Sync Outlook contacts with Dynamics CRM contacts.

- Easy to use Web Interface for customer.

- Show most up to date property information to be displayed on web by using tools like WCF & linked server.

- Added features like Lease Comps, Capital Market comps, campaigning for a property, and more, for buyers/sellers.

- Subscription based payment gateway that can be enable/display on any particular month.

- Subscription based SSAE-16 SOC-1 compliant Document Storage System.

retransform™
solutions for real estate

Business & Technical Benefits

- Easy to use interface for the solution to manage property & customer records.

- Implemented latest technologies like Dynamics & .Net 4.0 framework.

- The client can market website from CRM by sending mailers.

- Buyers & sellers can check trends online before buying or selling the property.

- Users can update property information to provide most up-to-date information to the prospective buyers.

- Sellers can market property by creating campaign online to reach more & more corporate.

- Client makes money by allowing user to come & post their properties.

- Users can manage property documents online and share the same with others.

- Allow users to connect to each other as they do on social networking application, can update latest trends on wall for others to know the same.

- Users get email notifications about any changes on the property that they have tagged or the properties they are tracking.

- Property Managers / Agents / Owners can market their property by uploading the user list and setup the flyer. 3rd Party email integration is implemented.

- Integrated with the distributor websites to pull their property information in MRETA using the API.

- Property managers / agents can setup the profile to push information to the other service providers like xceligent, Loopnet, 42 Floors. Properties for which user is associated goes to the service providers.

- The solution integrated with Word Press for the weekly Newsletter.

- Other features - Stacking Plan, Driving Tour, Social Networking within the solution, SSRS reports view.

Conclusion

Retransform is a unique business solutions innovator focuses on the systems that power the real estate industry. Retransform team which has specialists in CRM & web application development, created a robust solution with industry standard practices and scalable architecture. The solution was easy to use and easy to maintain.

Today, the client has successfully monetized the solution. The solution is being used by more than 25000 subscribers, hosts more than 80,000 property information and the number of connections is continuously increasing.

retransform™
solutions for real estate

DALLAS	+1-877-362-6243
LONDON	+1-877-362-6243
DUBAI	+971-4-501-5931
MUMBAI	+91-22-2491-5383
CHENNAI	044-283 553 90/91
GANDHINAGAR	+91-79-2928-8034