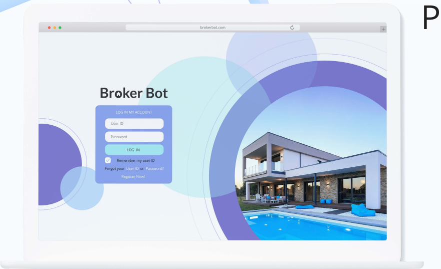
Broker Bot

Web-based real estate all-in-one solution for brokers and property managers

Download the Case Study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LOG IN MY ACCOUNT
User ID
Password
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☑ Remember my user ID
Forgot your User ID or Password?
Register Now!

Project Overview

The Broker Bot is a web-based real estate management solution which is used as a communication and management platform for property market participants.

This all-in-one solution offers a vast variety of features to help manage a database of properties, owners and tenants, as well as streamline tasks, view reports, maximise revenue and improve the client experience.

Story Behind

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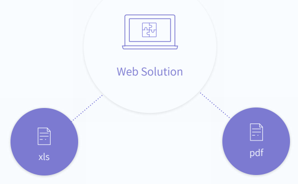
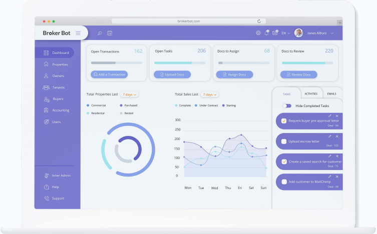
Our client is a real estate company who employ more than 550 brokers and have large customer equity. For brokers, the process of searching for information related to a particular deal among numerous documents and contracts was time-consuming and inconvenient. The problem arose as the company stored data as shared resources in PDF formats, and didn't have robust real estate management software.

The primary issue was the inability to track the quality of a broker's work due to the lack of a follow-up system. After analysing the effectiveness of the company's business processes, our client decided to create a web management application to offer fully automated control of all company operations.


Web Solution
xls
pdf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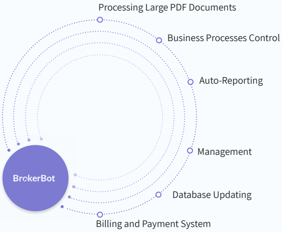
Help
Support
Open Transactions 162
Add a Transaction
Open Tasks 206
Upload Docs
Docs to Assign 68
Assign Docs
Docs to Review 220
Review Docs
Total Properties Last 7 days
Commercial
Purchased
Residential
Rented
Total Sales Last 7 days
Complete
Under Contract
Starting
300
250
200
150
100
50
0
Mon
Tue
Wed
Thu
Fri
Sat
Sun
TASKS
ACTIVITIES
EMAILS
Hide Completed Tasks
Request buyer pre-approval letter
Deal - 94
Upload escrow letter
Deal - 102
Create a saved search for customer
Deal - 75
Add customer to MailChimp
Deal - 99

Challenge

Before our intervention, the client an ineffective system of manually managing and tracking each broker's workflow. Therefore, our main task was to create a comprehensive management all-in-one solution.

The client's initial requirement was to achieve the automation of core business processes; to handle the property, tenant and owner database, accounting, customer relationship management and provide a work order management system. Another requirement was to integrate the existing storage of large documents in PDF format into the application database without data loss.


Processing Large PDF Documents
Business Processes Control
Auto-Reporting
Management
Database Updating
Billing and Payment System
BrokerBot

Pulling together all demands, we have highlighted the main objectives as follows:

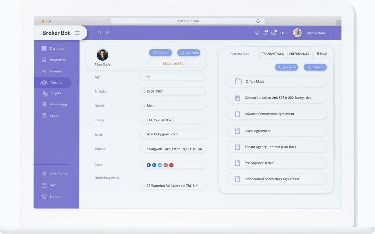
- to provide control of business processes and employees throughout the deal cycle, including management mechanisms and automatic reporting;
- to carry out rapid processing and analysis of large PDF documents for seamless searching;
- to continuously update and manage the property, owner and tenant database;
- to integrate a robust billing and payment system.

Solution

To implement the control of the brokers' workflow, as well as the automation of core business processes, we created a management all-in-one solution which provides the following features:

- Contact and document management
- Transaction management
- Billing and payment processing
- Database updating
- Follow-up system

Document Management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Update
Add Note
Match and Rent
DOCUMENTS
TRANSACTIONS
PREFERANCES
EMAILS
Add New
Search

Allan Butler

Age: 52
Birthday: 15.03.1967
Gender: Men
Phone: +44 75 2070 8575
Email: allanbut@gmail.com
Adress: 2 Dingwall Place, Edinburgh EH16, UK
Social
Other Properties: 72 Waterloo Rd, Liverpool 7BL, UK

- Offers Made
- Contract to Lease Unit 876 ft 200 Sunny Isles
- Advance Commission Agreement
- Lease Agreement
- Tenant Agency Contract (PAR BAC)
- Pre-Approval letter
- Independent contractors Agreement

Determination of Eligible Realty Options

We provided the alignment of the existing real estate options with tenant preferences and requirements. We performed the parsing and integration of the existing documents in PDF format into the database. All documents and files related to the owners, property and tenants are interlinked, well recorded in separate profiles and easy to track.

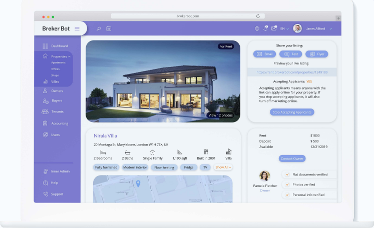
As a result, the web application can, in just a few seconds, generate matched realty options. This allows brokers to centralise document management, allowing them to reach the negotiation stage more quickly.

Property Profile

The property profile contains detailed information about the objects of real estate, such as:

- lease features and term
- payment methods
- photo gallery
- property location
- rooms, storey and views
- amenities and services

The opportunity to track property on google maps and fill in a large amount of detailed information about the property allows brokers to eliminate misunderstandings in the negotiation process with customers and accelerates the process of selecting the most suitable option.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Support
For Rent
View 12 photos
Share your listing:
Email
Text
Flyer
Preview your live listing
Stop Accepting Applicants
Contact Owner
Show All

https://rent.brokerbot.com/properties/1249189

Accepting Applicants: YES

Accepting applicants means anyone with the link can apply online for your property. If you stop accepting applicants, it will also turn off marketing online.

Nirala Villa

20 Montagu St, Marylebone, London W1H 7EX, UK

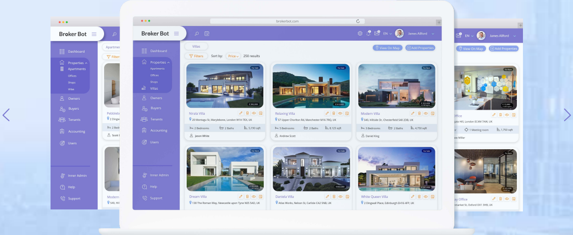
2 Bedrooms · 2 Baths · Single Family · 1,190 sqft · Built in 2001 · Villa

Fully furnished · Modern interior · Floor heating · Fridge · TV

Rent $1800
Deposit $ 500
Available 12/21/2019

Pamela Fletcher
Owner

✓ Flat documents verified
✓ Photos verified
✓ Personal info verified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Support
Villas
View On Map
Add Properties
Filters
Sort by:
Price

250 results

Nirala Villa
20 Montagu St, Marylebone, London W1H 7EX, UK
2 Bedrooms · 2 Baths · 5,190 sqft
Jason White

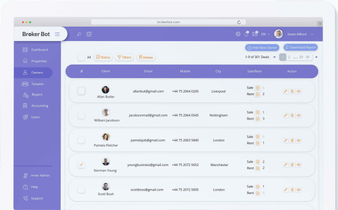
Relaxing Villa
57 Upper Chorlton Rd, Manchester M16 7RQ, UK
5 Bedrooms · 2 Baths · 8,125 sqft
Andrew Scott

Modern Villa
540, Hillside Dr, Chesterfield S40 2DB, UK
3 Bedrooms · 2 Baths · 4,750 sqft
Daniel King

Dream Villa
130 The Roman Way, Newcastle upon Tyne NE5 5AD, UK

Daniela Villa
Atlas Works, Nelson St, Carlisle CA2 5NB, UK

White Queen Villa
2 Dingwall Place, Edinburgh EH16 4FP, UK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Support
Add New Owner
Download Report
All
Status
Filters
Delete

1-9 of 301 Deals

#	Client	Email	Mobile	City	Sale/Rent	Action
☐	Allan Butler	allanbut@gmail.com	+44 75 2064 0205	Liverpool	Sale 0 Rent 2	
☐	William Jacobson	jacobsonmail@gmail.com	+44 75 2064 0545	Nottingham	Sale 1 Rent 3	
☐	Pamela Fletcher	pamelajob@gmail.com	+44 75 2063 5840	London	Sale 0 Rent 1	
☑	Norman Young	youngbusiness@gmail.com	+44 75 2072 5652	Manchester	Sale 2 Rent 2	
☐	Scott Bush	scottboss@gmail.com	+44 75 2072 5005	London	Sale 1 Rent 0	

Owner Profile

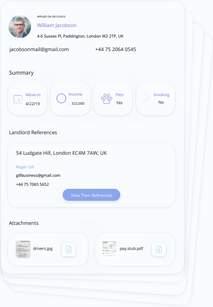
Property owner profiles contain documents and contact information for automatic reporting, in case of a successful transaction or notification of intermediate results.

The profile describes the main requirements of property owners, including the lease details and desired prospective tenant information. Also, there is a description of the owner's characteristics, as well as an area for a brokers personal notes, allowing for the assessment of the quality and reliability of the owner, which can be useful for further cooperation.

Tenant Profile

Tenant profiles are created and filled for brokers to assess the reliability of their cooperation, as well as to determine eligible realty options. The tenant profile contains the following information:

- contact information and documents
- tenant requirements and preferences
- real estate search history
- reviews of previous landlords
- the history of overdue and timely payments
- behaviour description and complaints in the last lease



APPLIED ON 09/12/2019

William Jacobson

4-6 Sussex Pl, Paddington, London W2 2TP, UK

jacobsonmail@gmail.com

+44 75 2064 0545

Summary

Move-in: 4/22/19

Income: 322,000

Pets: Yes

Smoking: No

Landlord References

54 Ludgate Hill, London EC4M 7AW, UK

Roger Gill

gillbusiness@gmail.com

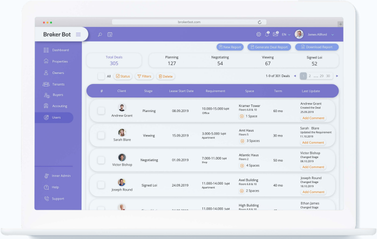
+44 75 7065 5652

View Their References

Attachments

drivers.jpg
pay.stub.pdf

Transaction Management



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All
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Filters
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1-9 of 301 Deals
1 2 … 29 30

Total Deals 305

Planning 127

Negotiating 54

Viewing 67

Signed Loi 52

#	Client	Stage	Lease Start Date	Requirement	Space	Term	Last Update
☐	Andrew Grant	Planning	08.09.2019	10.000-15.000 SqM Office	Kramer Tower Floors 6.8 & 10 1 Space	60 mo	Andrew Grant Created the Deal 25.09.2019 Add Comment
☐	Sarah Blare	Viewing	15.09.2019	3.000-5.000 SqM Apartment	Amt Haus Floors 5 3 Spaces	30 mo	Sarah Blare Updated the Requirement 11.10.2019 Add Comment
☐	Victor Bishop	Negotiating	01.09.2019	7.000-11.000 SqM Shop	Atlantic Haus Floors 2 4 Spaces	50 mo	Victor Bishop Changed Stage 08.10.2019 Add Comment
☐	Joseph Round	Signed Loi	24.09.2019	11.000-14.000 SqM Apartment	Axel Building Floors 6.8 & 10 2 Spaces	40 mo	Joseph Round Changed Stage 18.10.2019 Add Comment
☐				11.000-14.000 SqM	High Building		Ethan James Changed Stage

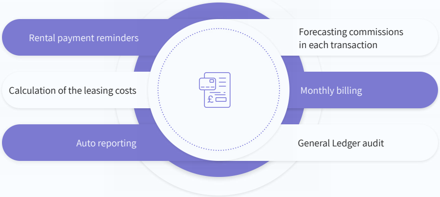
The contract and transaction management feature includes:

- automated audit and storage of contracts
- tasks management
- e-signing of contracts
- filling out contracts through the synchronisation of property, owner and tenant profiles
- contract scanning repository for the detection of errors and missing data in documents and contracts
- auto-notifications and alerts

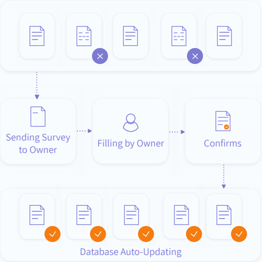
These features allow brokers to exclude paperwork, reduce the time spent filling out documents and collecting the signatures of all parties relevant to a contract, , which speeds up the transition of deals to closing status.

Billing and Payment Processing

This broad and reliable functionality provides the real estate company with the possibility of simple accounting. The real estate company is supported by an efficient, transparent and reliable accounting system which simplifies the audit process, reduces time spent generating reports and ensures deadlines are met.


Rental payment reminders
Forecasting commissions in each transaction
Calculation of the leasing costs
Monthly billing
Auto reporting
General Ledger audit

Database Updating


Sending Survey to Owner
Filling by Owner
Confirms
Database Auto-Updating

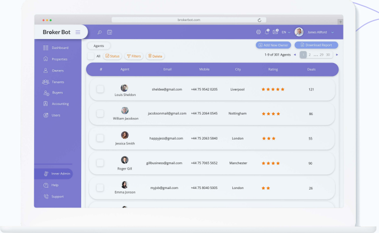
The real estate industry has a high transaction velocity, so data loses relevance constantly. In cases where outdated or incomplete documents about real estate objects are found in the database, we have provided a feature to automatically send a survey to the property owners email address to update and supplement documents.

After a survey is returned by the owner, the data is integrated into the database and, at the same time, brokers are notified about the update to ensure the immediate processing of received data.

Follow-Up System

This tab is intended for the top management of the real estate company. It can receive various reports and analytics at once, which allows managers to measure the performance of each broker and track the effectiveness of sales processes.

For clarity, the follow-up system allows you to create various graphs on key performance indicators (KPI). The all-in-one management solution provides unprecedented levels of management control through permission and approval structures based on parties and roles.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Add New Owner
Download Report
All
Status
Filters
Delete
1-9 of 301 Agents
1
2
...
29
30

#	Agent	Email	Mobile	City	Rating	Deals
☐	Louis Sheldon	sheldee@gmail.com	+44 75 9542 0205	Liverpool	★★★★★	121
☐	William Jacobson	jacobsonmail@gmail.com	+44 75 2064 0545	Nottingham	★★★★	86
☐	Jessica Smith	happyjess@gmail.com	+44 75 2063 5840	London	★★★	55
☐	Roger Gill	gillbusiness@gmail.com	+44 75 7065 5652	Manchester	★★★★	90
☐	Emma Jonson	myjob@gmail.com	+44 75 8040 5005	London	★★	26

Technologies

Front-End

- Angular
- HTML
- CSS
- Bootstrap

Back-End

- C#
- ASP.NET
- MS SQL
- Hangfire Background

Other

- Google Maps API
- SMTP

Scope of Work

1 Project Manager

2400
hours of development

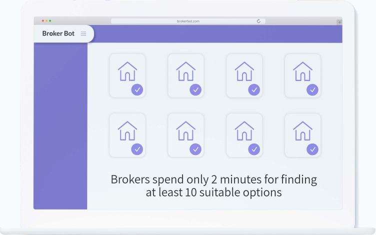
1 Web Developer

1 Frtonted Developer

1 UI/UX Designer

Quality Assurance Team

Results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Brokers spend only 2 minutes for finding at least 10 suitable options

After the implementation of the all-in-one management solution, the company analysed the effectiveness of their workflow. Currently, brokers spend only 2 minutes finding at least 10 suitable options, instead of the previous 20 minutes for 1 suitable real estate option. The average number of closed deals by one broker increased from 12 to 40 deals per month.

Top management can easily manage and monitor core business processes, from routine brokers tasks to automatic accounting and auditing of all financial activities.