



# PROPERTY CRM

Power your  
property success  
with the Best  
Estate Agents'  
Software

Property CRM- the robust property management and compliance software solution is specifically designed for Estate Agents. The software application is designed to help you access and manage clients, maximise your marketing and control customer communications - on one single platform, leaving you more time to grow your business.

Intensive, repetitive administration can take you away from your core selling business, and the ever-important need to stay service-driven while keeping costs down.

Property CRM has all the components you need to meet and manage the needs of your business easily, efficiently and cost-effectively.

# Open the door to the new CRM efficiencies

Property CRM is here to streamline your Estate Agents operation – for smoother, smarter results and happier customers, clients and partners.

At Property CRM we've been pioneering software development specifically for property professionals, for over three decades. No property software company knows the Irish market like we do: your challenges and opportunities, pain points and pressures.

Our team of expert and experienced specialists have developed, evolved and advanced software that works intuitively with your business, accommodating every step and stage of your process.

## PROPERTY CRM IS FOR YOU

You can use Property CRM to manage, market, optimise and communicate developments, enquiries, lettings, sales, valuations and reviews of properties. You can use it across all property types, including agricultural, commercial and residential property. If you have a specific need we are happy to discuss your requirements.

You can manage, contact and communicate with all kinds of customers and clients, suppliers and stakeholders, contractors (including repairers) and other third parties, firms, individuals, professional firms and advisors, landlords, purchasers, tenants and vendors. Manage your staffing efficiently with *Where's Sam*, our advanced staff leave management system.

## SECURE ACCESS, ANYWHERE

Property CRM is completely web-enabled to provide seamless accessibility from ANY smart device with an internet connection. Work on a PC, laptop, tablet, or smartphone, at any time and from any place - and get the job done. No more costs and crises that come from maintaining your own server – Property CRM databases are securely hosted and backed up in the Microsoft Azure environment, so you can bank on reliability, security and performance.

## VIEW

Organise, search and access all customer, client and property data, all from one centralised platform that's updated in real time – saving time, resources and energy. View contacts, offers, diary, and viewings from anywhere.

## MANAGE

Efficiently manage EVERY aspect of your business. From facilitating easy communication with customers, clients, and suppliers to a document management system that eliminates paper files. Including up-to-date tools to ensure your compliancy, to generating sales and letters – you can do and manage it all with Property CRM. The kind of keen management that grows repeat business and customer loyalty.

## GROW

It's so much easier to seize every lead and prospect to supercharge your sales.

## SUPPORT

We know the important role support plays in your business success. That's why we make sure ours is second-to-none. We have a dedicated support team, led by property qualified specialists, to address any query or concerns you have, while you can also reach out via email at [support@propertycrm.ie](mailto:support@propertycrm.ie) or call 065-6844448. Five hours of training included in the price

## SAMPLE OF WHAT OUR CLIENTS SAY

*"Property CRM is a godsend for our Estate Agency business. We have been using this system for almost 5 years and it has now become a much-valued tool for our busy office. From creating clients, diary management, mobile user apps., creating brochures, buyer matches, web feeds, customised reports, creating legal documentation to name but a few... Property CRM has it all. Help and support is only a phone call or email away with every member of the team on the ready (in particular Clare and Aideen) to resolve any issues or queries we may have in a speedy and effective manner."*

Daphne Whittle,  
JORDAN AUCTIONEERS, Newbridge

# Total process management

Property CRM offers your business the benefit of unparalleled functionality and capabilities:

## MANAGE CRM/WORKFLOW

|  |
|--|
| Advanced search functionality across the system            |
| Appointments & Viewings (inc. recurring)                   |
| Appraisals & Inspections                                   |
| Brochure build (user design brochure accommodated)         |
| Diary (synchronised with Outlook)                          |
| Document Management  |
| Email and Email Merge                                      |
| Key Register   |
| Logs & Task Management                                     |
| Offers time and date stamped                               |
| Property and Enquiry, automated, matching and shortlisting |
| Repairs Management   |
| Signs Workflow   |
| Template: Letters and Emails                               |
|  |
|  |

## REPORTS

|  |
|--|
| Account Balance Report                 |
| Arrears Report                         |
| Client Account Report                  |
| Client and Office Account Reports      |
| Commission Reports - Sales & Rentals   |
| Creditors Due Report - Sales & Rentals |
| Creditors Report                       |
| Deposit Held Report - Rentals          |
| Inspection Report                      |
| Landlord Account Report                |
| Letting Report                         |
| Monthly Sales Pipeline Report          |
| Pending Payments to Landlords          |
| Reconcile Rental Payments              |
| Rent Review Report                     |
| Repairs/Renovations                    |
| Transaction Report                     |
| Valuation Report                       |
| Withholding Tax Report                 |
|  |
|  |

## COMPLIANCE

|  |
|--|
| AML (Photo and Address ID)                                 |
| AMV Record   |
| BER Cert including BER Number                              |
| Client Account Reconciliation                              |
| Compliance Tracking and Checklist                          |
| GDPR Compliance Tools                                      |
| Letters of Engagement templated                            |
| Office Account per property                                |
| Offers time and date stamped                               |
| PRSA Document library                                      |
| Sales, Confirmations, Vendor, Purchaser and two Solicitors |
|  |

## INTEGRATION

|                                     |
|-------------------------------------|
| Bid Now                             |
| Daft.ie, MyHome.ie, RightMove.co.uk |
| DocuSign (digital signature)        |
| Eircode per property                |
| Facebook/Instagram                  |
| Google Maps                         |
| LSL                                 |
| Offr                                |
| Outlook 365                         |
| Own Firm Website                    |
| Property 24-7 and PropertyPal.com   |
| SMS (Bulk or single)                |
| Telephone (Clauda)                  |
|                                     |

## ACCOUNTS

|                               |
|-------------------------------|
| Client Account                |
| Client Account Reconciliation |
| Office Account per property   |

## ADDITIONAL FACILITIES

|                               |
|-------------------------------|
| Agent own website (WordPress) |
| Property 24-7 website         |
| Property 24-7 client portal   |
|                               |

|      |  |
|------|--|
| Firm |  |
| Date |  |

## SOFTWARE

|                             | NUMBER OF<br>USERS | COST PER MONTH<br>EX. VAT |
|-----------------------------|--------------------|---------------------------|
| Property Sales Module       |                    |                           |
| Residential Lettings Module |                    |                           |
| Mobile Only Version         |                    |                           |
|                             | DISCOUNT           |                           |
|                             | NETT               |                           |

## INTEGRATIONS

|                                 |                            |                       |
|---------------------------------|----------------------------|-----------------------|
| Brochure Build App              |                            | FREE                  |
| Daft, MyHome                    |                            | FREE                  |
| DocuSign                        |                            | FREE                  |
| Client Account                  |                            | FREE                  |
| Office Account                  |                            | FREE                  |
| Property 24-7 website inclusion |                            | FREE                  |
| Post Code Search (Property)     |                            |                       |
| Repairs App (mainly rentals)    |                            |                       |
| Where's Sam                     |                            |                       |
| Telephone                       |                            | Single Setup Fee €250 |
|                                 | TOTAL PER<br>MONTH EX. VAT |                       |

## WEBSITE

|                  |               |
|------------------|---------------|
| Website build    | €1800         |
| Site maintenance | €25 per month |

Get in touch to find out more or  
book a demo.

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Property CRM  
Ennis  
Co. Clare

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