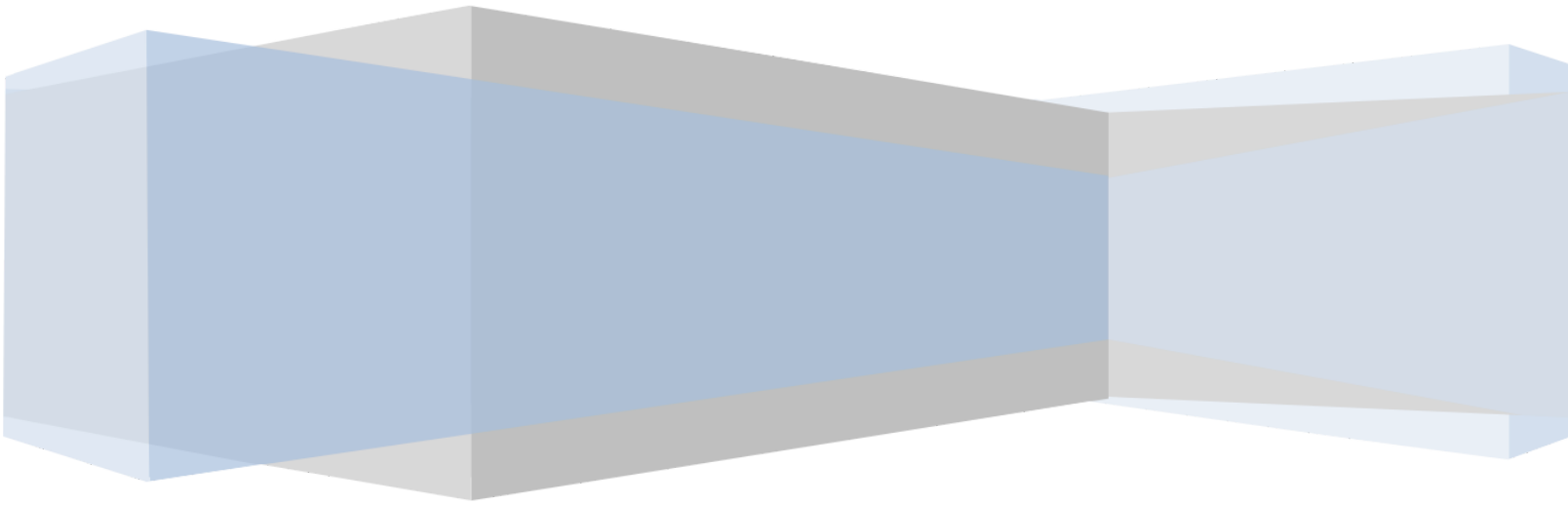
REALTYNA
Real Estate Online Solutions

CRM Add-On (For WPL)

Realtyna Inc.



Contents of this manual are applicable to the WPL CRM Add-On. Details of this manual may be different based on the customizations or software you have.

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Introduction

Our WPL CRM (Customer Relationship Management) Add-on has been specially designed and developed based on business processes and models required by real estate agents/brokers/realtors.
With the WPL CRM you are able to manage all of your contacts and their enquiries, follow-up with leads, simplify your scheduling, optimize your workflow and improve your customer service.

System Requirements

To use the CRM Add-On, you will need the WPL Pro. (You can't install any add-ons on WPL Basic)

Installation

If you have the installation package of the CRM add-on, you can easily upload it from the following path: WordPress->WPL dashboard->Install Add-on form.

Glossary

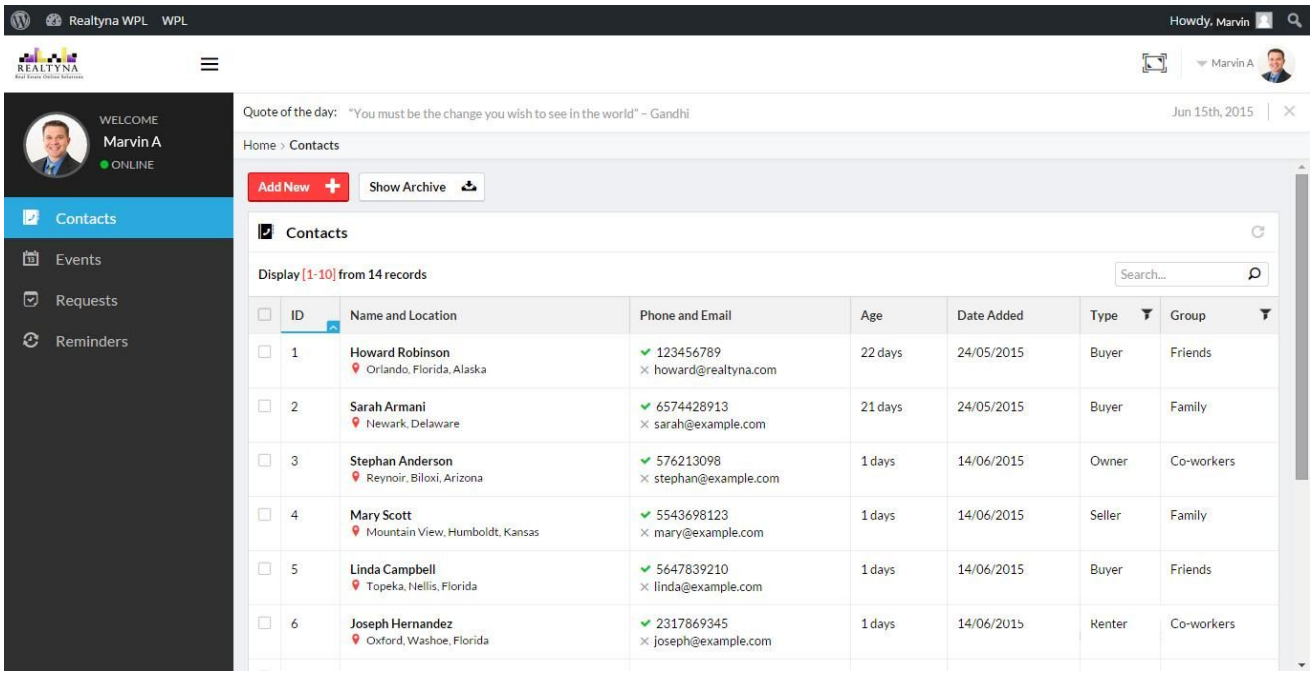
Lead: A lead is a contact that either fills out the CRM form directly on the website with information about their request, or the lead information is added into the system by an agent. A lead can be a buyer or a seller.

Header Elements

- You can add your logo to the left corner of the header. To add the logo: WPL Back-end > Settings > CRM > Logo.
- To see the full size screen view of the page, you can click on the resize icon on the right corner of the header.

Contacts Management

Managing contacts is a significant feature of the WPL CRM software. When you open the CRM, you will see the Contacts page. Here you can manage your contacts by adding/removing or editing them.



Add a Contact

There are two ways to add contacts to the CRM:

1) You or other agents can enter the contacts information manually by clicking on the "Add New" button at the top of the contacts page in the CRM. Fill out the information form which opens from the right side of the page and then save it. You can limit the Adding Contacts access level for different agents or membership groups by referring to the "Membership" add-on or the "User Manager" in back-end.
2) Leads can fill out the CRM form in the front-end of the website by clicking on the CRM form link on the main menu or the CRM form icon on the property details page (the ID of the property will be shown for these contacts).

You can select one of these methods to distribute new leads generated from the property details page:

- **Use Round Robin:** You can use the Round Robin algorithm to distribute leads between agents equally in circular order.
- **Managed by Lead Distribution Manager**
- **Assign to Property Owner**

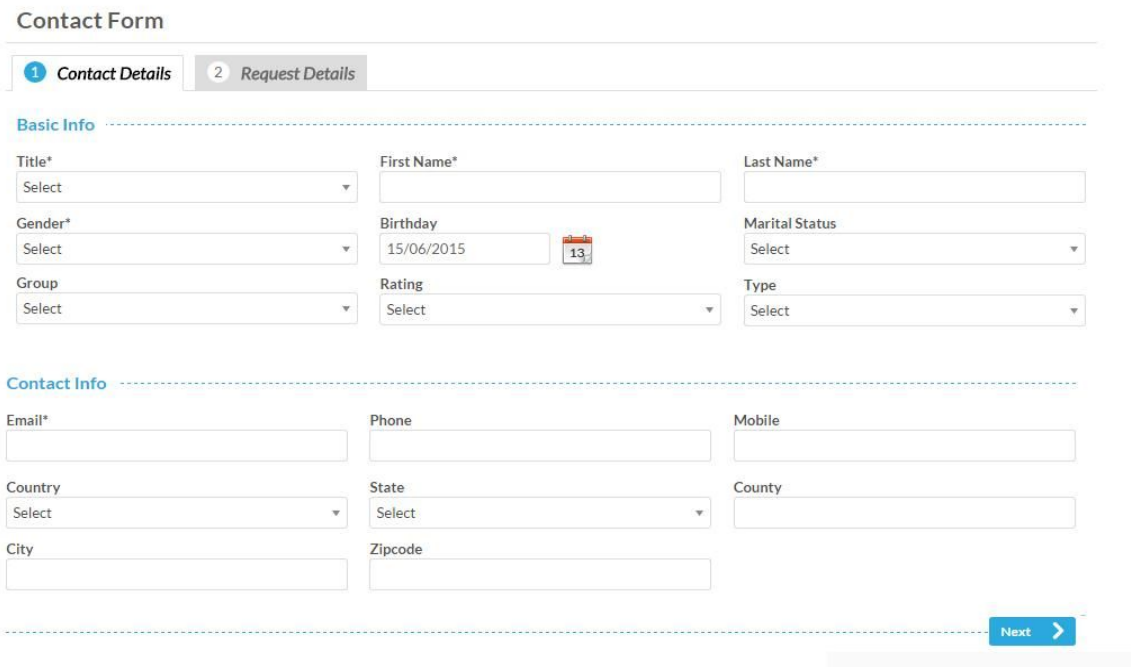
If new leads were generated from the general CRM form, only the first two options are applicable. (To find out how to make these adjustments, please refer to the "WPL Settings" in this manual)

***Note:** There is a 'Contact Agent' module on the property details page which is an email-based system to gather information about a client request and is not related to the CRM add-on.*
***Note:** You can add/remove/edit any field of the information forms within the CRM pages by referring to: WPL Back-end > Flex > CRM.*

CRM Form

The CRM form is set up for public users and all the viewers of the website can see this menu. This form has two tabs: "Contact Details" and "Request Details". The users will be able to insert their contact details and their request simultaneously. The "Group", "Rating" and "Type" fields are only visible to the users who log in as an agent. You can customize the CRM form by referring to: WPL Back-end > Flex > CRM > Contacts and Requests.

Note that is the form was opened from the property show page, then the Request Details tab will be mapped with the property details that was referred.

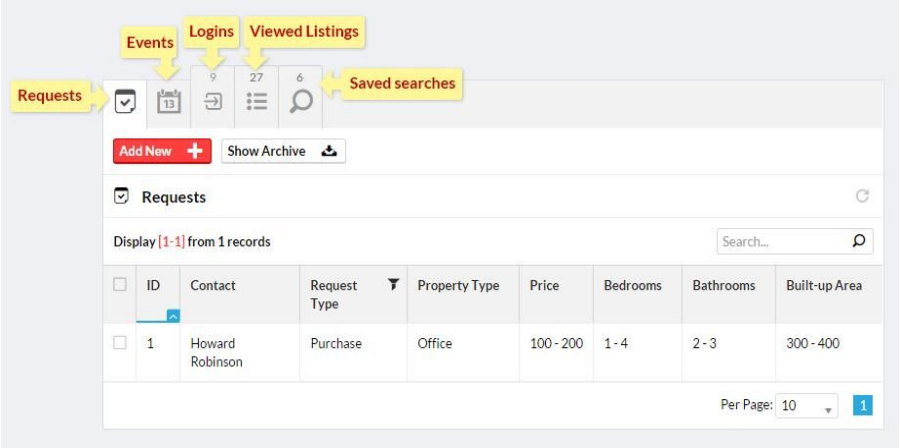


Edit a Contact

By clicking on a contact row, the contact details page will open and you can see the full details of the contact on the left side. By clicking on the "Edit icon", the information form will open and you can edit the fields there.

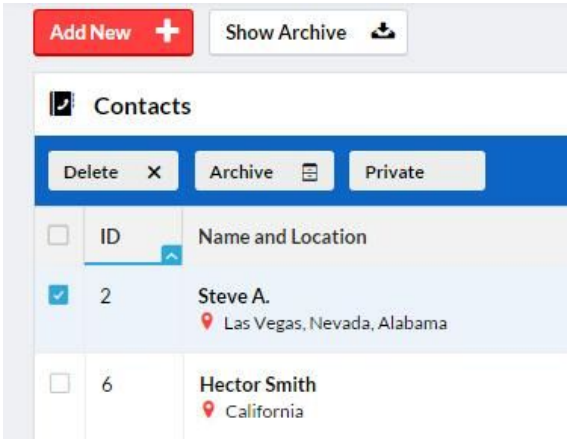
At the bottom of this form there is an “Assignment” section, where you can reassign the contact to other agents. Other agents can reassign their own or the other contacts to other agents as well if you give them access: WPL Back-end > User Manager > CRM and tick “Reassign Other Contacts” or “Reassign own Contacts” checkbox.

On the right side of this page, you can also navigate through the contact’s requests, events, number of logins, viewed listings and saved searches easily. Number of logins, viewed listing and saved searches are visible if the user registers and logs in to your website before filling out the CRM form.
By checking the frequently viewed listings or saved searches of contacts, you will be able to analyze what type of properties they are looking for and you can suggest appropriate properties based on this information.. You are able to add or edit a request or event directly from here.



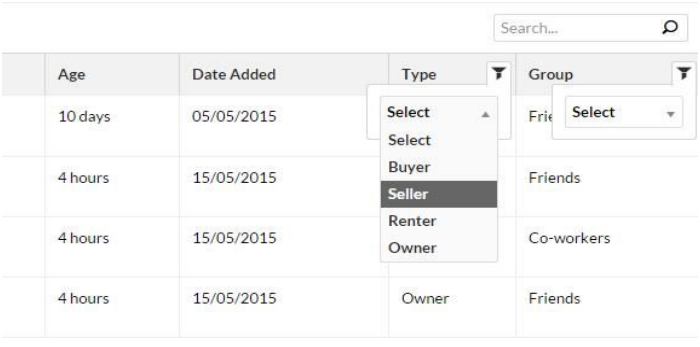
Delete, Archive, Private

If you don’t need a contact now and also don’t want to delete it, you can add it to the archive.. If you don’t want a contact to be viewed by the other agents, you can make it private.
To delete, add to archive or mark a contact as private, tick the checkbox beside each contact or the checkbox in the header for mass selection. The action bar will appear and you can select the desired action. To limit the access of a “Delete” or “Archive” option for different agents or membership groups, you can refer to the User Manager or Membership Add-on. For the “Private” option refer to the settings in the backend.



Search for a Contact

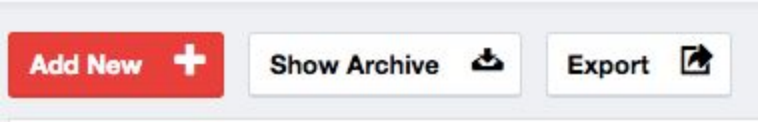
You will be able to search for a specific contact by using the search box or filtering button on the selective columns of the table. You can also change the order of the contacts to ascending or descending by clicking on the header of each column. For example, you can filter the searches by the group or the type a contact belongs to.



You also have an option to change the number of displaying contacts per page or search through the pages by using the pagination at the right bottom of the page.

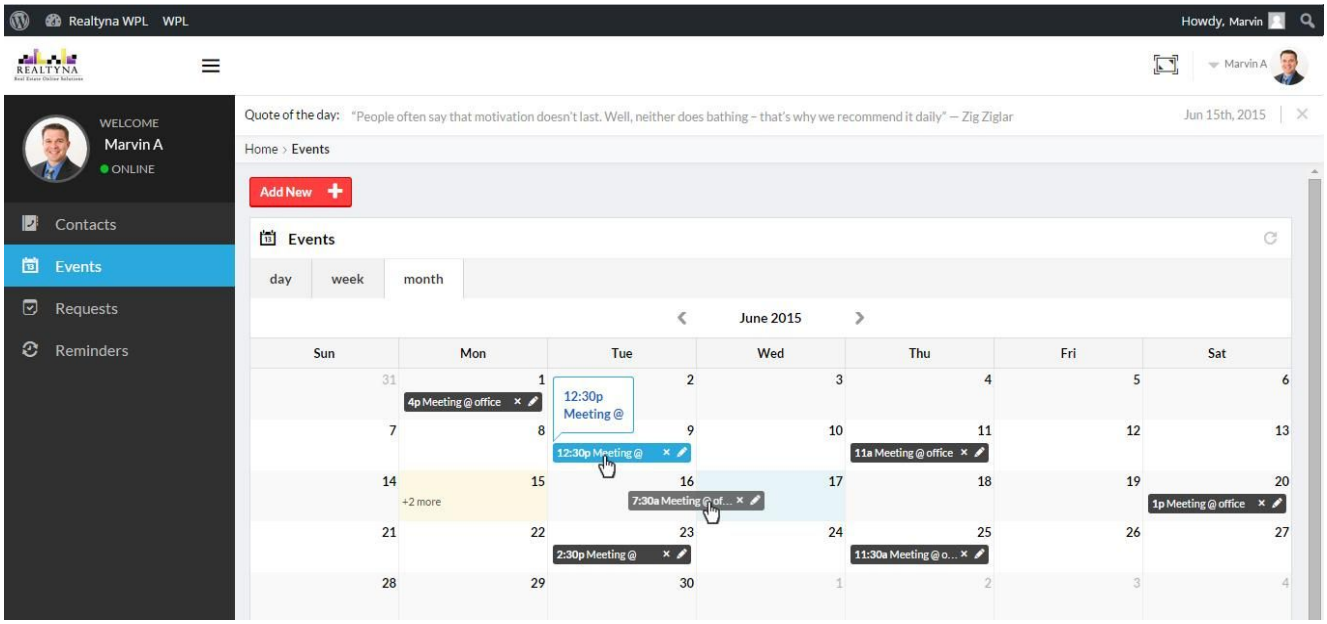
Export Contacts

In order to export your contacts, click on the Export button on top of the page. The visible contacts based on the current criteria will be exported in CSV format.



Events Management

You can manage your upcoming events using the Events tab in WPL CRM. Here you will see a fully functional calendar which makes it easy for you to manage your events.



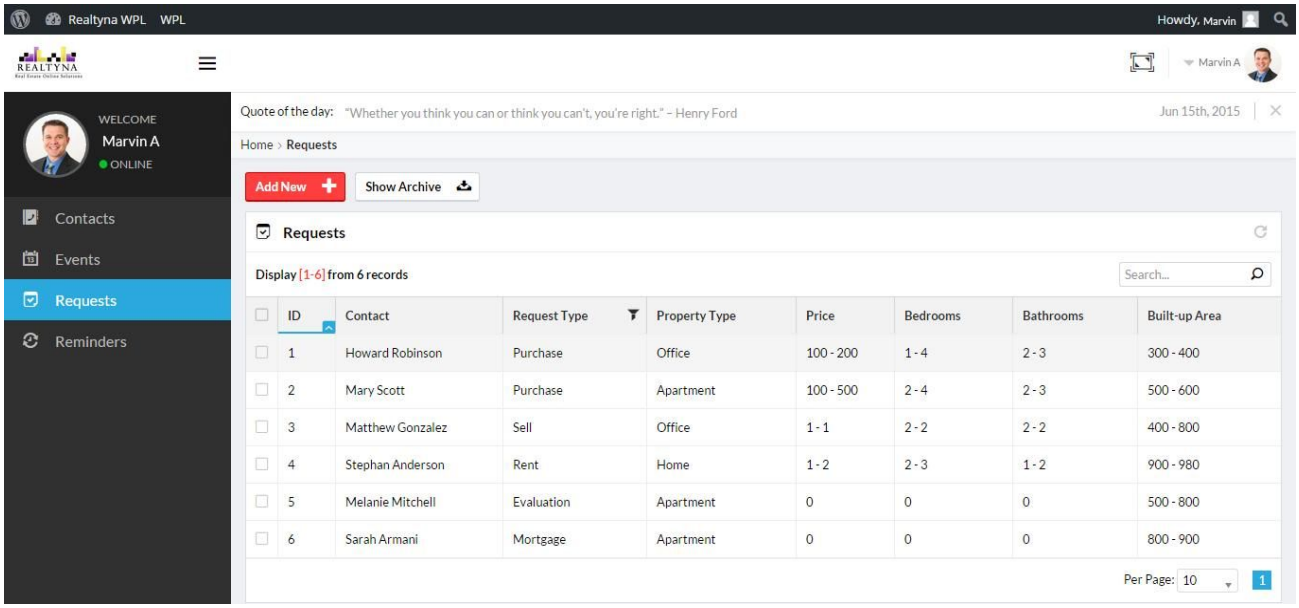
You can check the events three ways: Day, Week and Month. This makes it easier for you to access the events and you won't forget them.
By clicking on the "Add New" button or clicking on your desired date on the calendar and filling out the form, you can add a new event. You also can also adjust a reminder for each event.

There are two icons on each created event box on the calendar: "Edit" and "Delete". By clicking on the edit icon, you can edit the information. You can limit the access of the different agents and membership groups for editing, deleting or adding options by referring to the "Membership" Add-On and the "User Manager" in the back-end. Another amazing feature that makes the managing of events even faster is that you can change the date and the time of a created event by dragging it to your desired date or time. (Changing the time of the event by dragging is possible on day and week view).

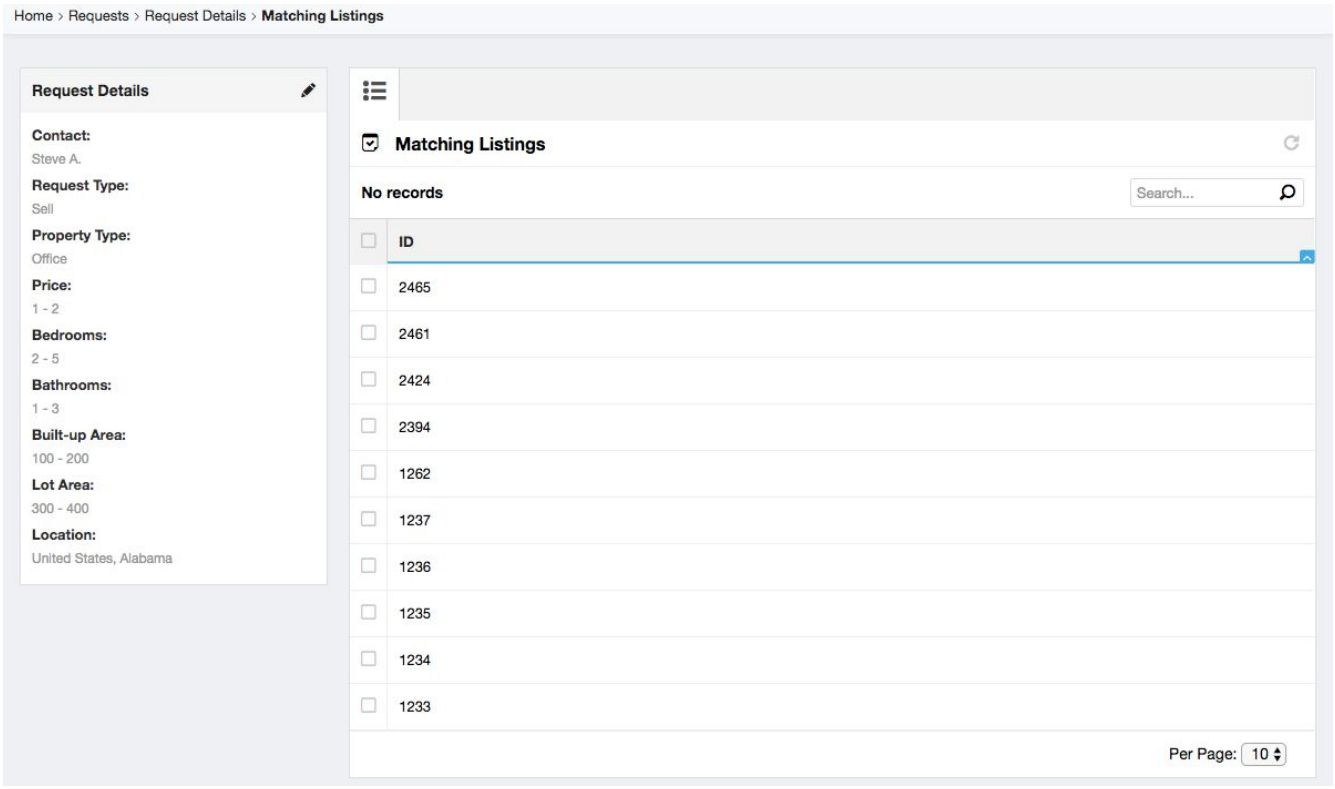
Requests Management

This page will provide you with an opportunity to manage the requests and focus on responding to them quickly. By clicking on the requests tab, you can see the client's inquiries on a table. The details of their requests such as the type of properties they are looking for, the price range, number of bedrooms, etc., are

stored here and all of these fields can be customized using Flex in your WPL Backend. You can filter, delete or archive requests the same way as the “Contacts”. The requests can be recorded in the CRM by the users via the CRM forms or by the agents themselves by clicking on the “Add new” on this page.



By clicking on a request, you can view the contents of the Request.



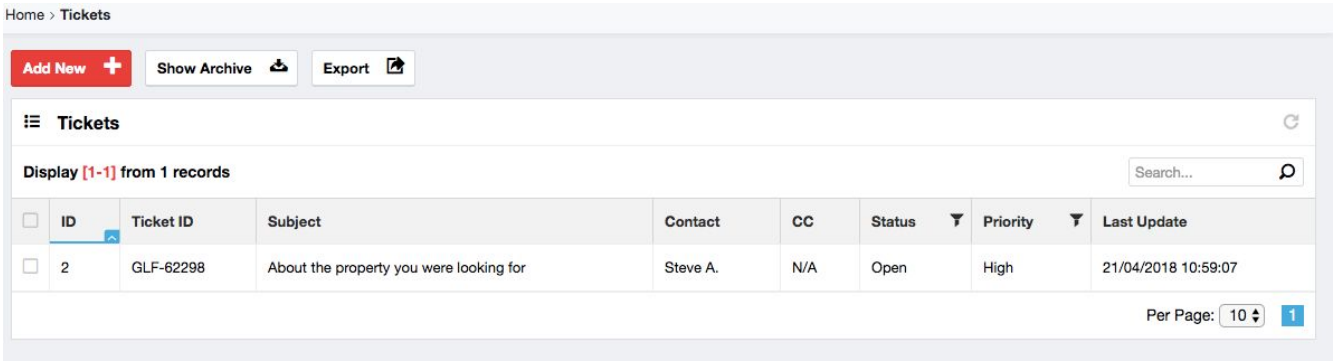
Also, editing a request is possible by simply clicking on the Edit icon in the request details page, and changing the information on the request form.

Matching Listings

By opening a request and viewing the details, you can also see the Matching Listings. This feature enables the CRM agents to see the listings that match the current request's criteria. You can view the actual listings by clicking on them.

Tickets Management

Using the Tickets tab, you can send email to your Contacts. This enables you to communicate with your clients directly from inside CRM. To do this, go to Tickets tab, then click on Add New button. Here you can select the contact that is going to receive the email and also enter another Contact as CC. Other features include defining a Status and a Priority for the tickets.



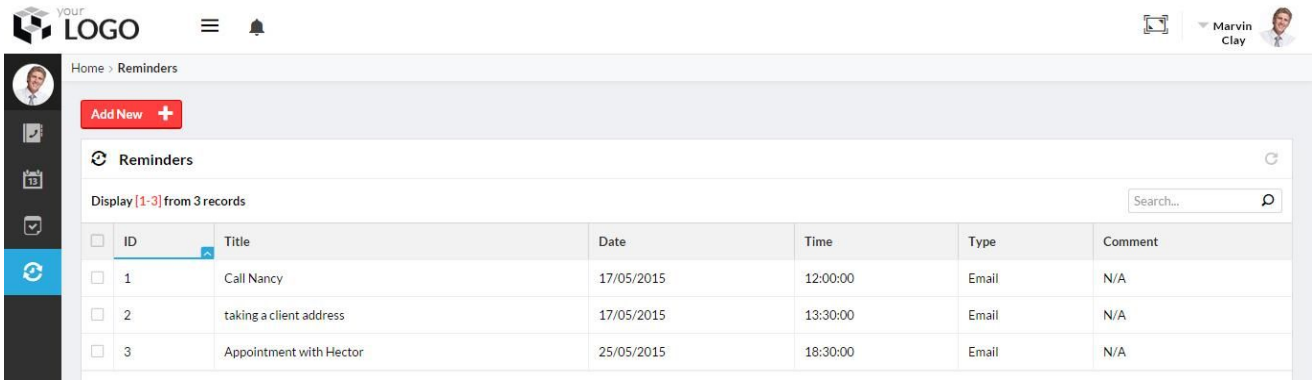
Email Piping

Using the Email Piping system, you can receive emails directly in your CRM by adding your email's SMTP settings. If you're not sure how you can get these SMTP settings, consider consulting with your email hosting provider.

In order to setup email piping, go to WPL Backend > Settings > CRM, and look under Ticket Settings.

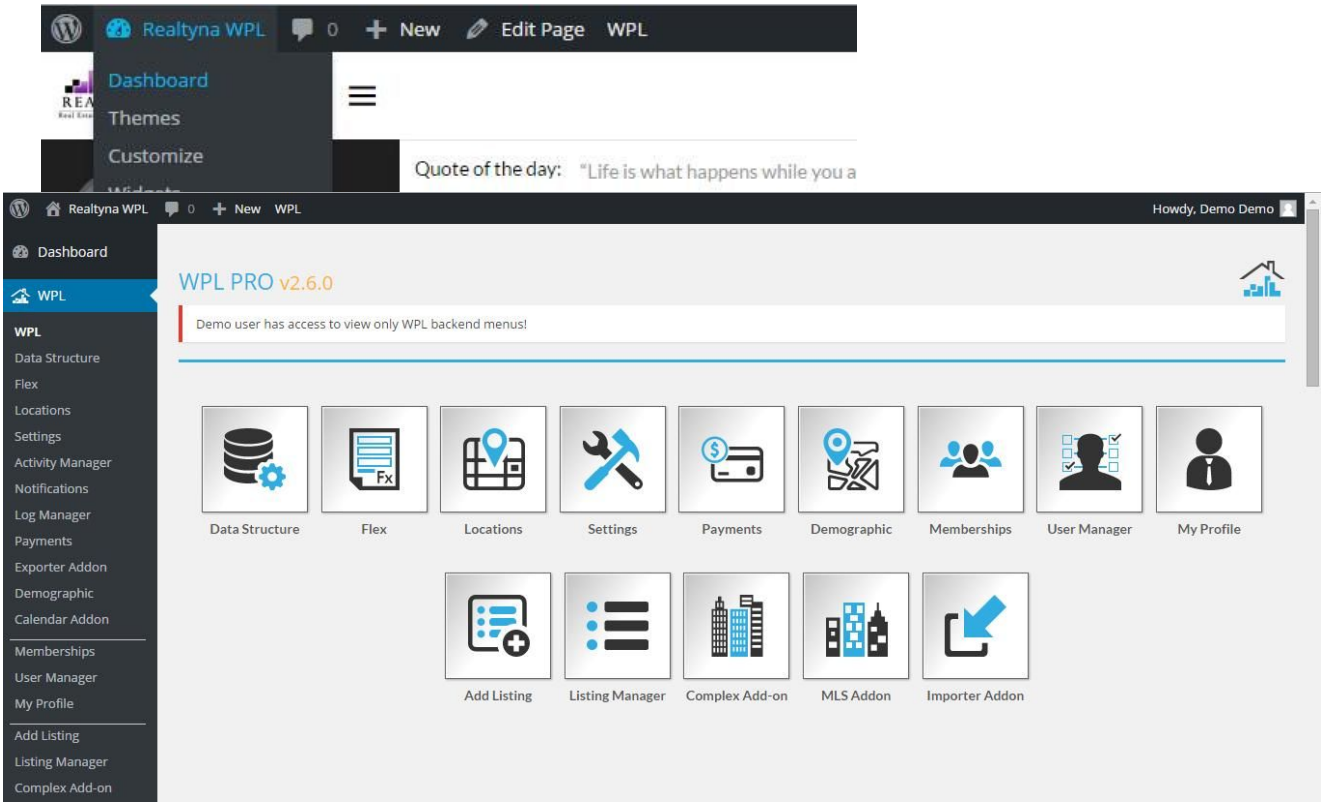
Reminders Management

To manage your time and keep track of things, it is better to use a system rather than trying to rely on your memory. To create a reminder for your to-do tasks just click on the "Add New" button and fill out the information form. You will receive a reminder based on the selected type (Email, SMS, etc.). For now, only the email option is available.



Back-end CRM Adjustments

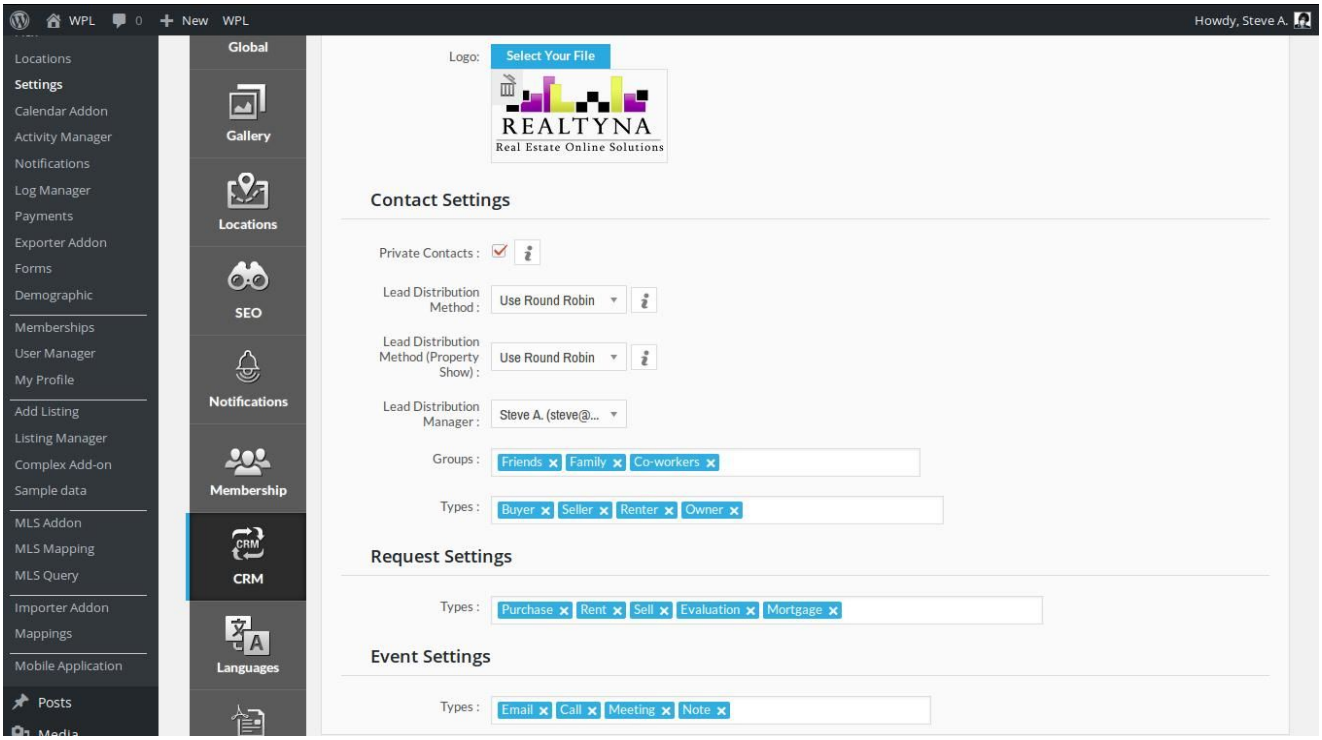
To access the back-end, click on the WPL link on the header of the page and select the Dashboard.



WPL Settings

Path: WPL Back-end >Settings > CRM

On this page you will see the following settings:



General Settings

Logo: You can select a logo to display on your CRM front-end.

Contact Settings

Lead Distribution Method: You can select one of these methods to distribute new leads generated from the general contact form:

- Use Round Robin: You can use the Round Robin algorithm to distribute leads between agents equally in circular order.
- Managed by Lead Distribution Manager (you can select the Lead Distribution Manager in another setting below)

Lead Distribution Method (Property Show): You can select one of these methods to distribute new leads generated from the property show page:

- Use Round Robin: You can use the Round Robin algorithm to distribute leads between agents equally in circular order.
- Managed by Lead Distribution Manager (you can select the Lead Distribution Manager in another setting below)
- Assign to the Property Owner

Lead Distribution Manager: You can select an agent as the lead distribution manager and all new generated contacts will be assigned to this agent. It only applies if you select the "Managed by Lead Distribution Manager" in the above section.
Private Contacts: By ticking this check box you can select whether the agents can have private contacts (The private contacts can be seen only by that agent).

Group: You can define the contact groups here. Selecting a group makes searching for contacts easier on the contact page of the CRM. For example, when you are searching for a contact that belongs to a co-workers group in the contact page, you can filter the group column based on the co-workers and find it easily.

Types: You can define the contact type. Defining the type helps to classify the contacts and you can filter them easily.

Event Settings:

Here you can define the type of the events. Defining the type of event helps to classify the event easily.

Request Settings

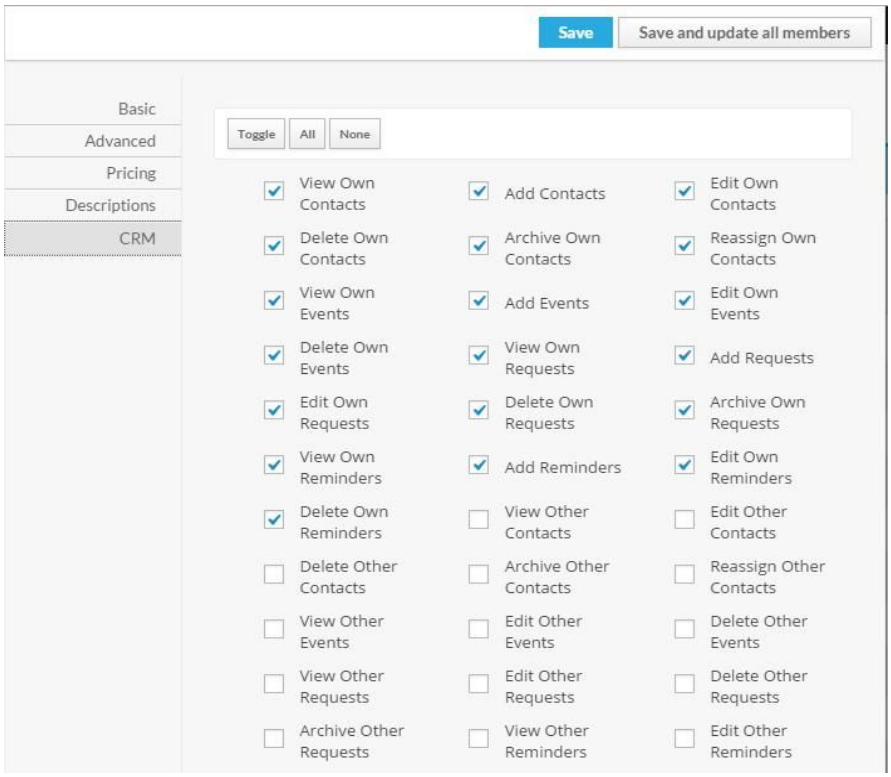
Types: Here you can define the type of the request. Defining the type helps to classify the request easily.

Membership Add-on

Path: Back-end > WPL Dashboard >Membership > Edit > CRM

If you purchase and install the membership add-on along with the CRM, , you will be able to set the access and limitation level for most parts of the CRM in different membership groups.
By selecting or deselecting an item, you can set the access or set the limitation level to different groups within memberships. For example, when you tick the checkbox of “View Other Contacts” the members of that group

can see all other non-private contacts in the CRM. You can also adjust the access of the membership groups to the Add, Delete, Archive, Assignment or other important options of the CRM here.



When you want to save membership data, there are two options:

Save: Only saves the membership settings for the future members assigned to that membership without updating the current users.

Save and update all members: Save the membership setting and overwrite all the current users with this membership setting.

For more information, please read the Membership manual.

User Manager

Path: Back-end > WPL Dashboard > User manager > Edit > CRM

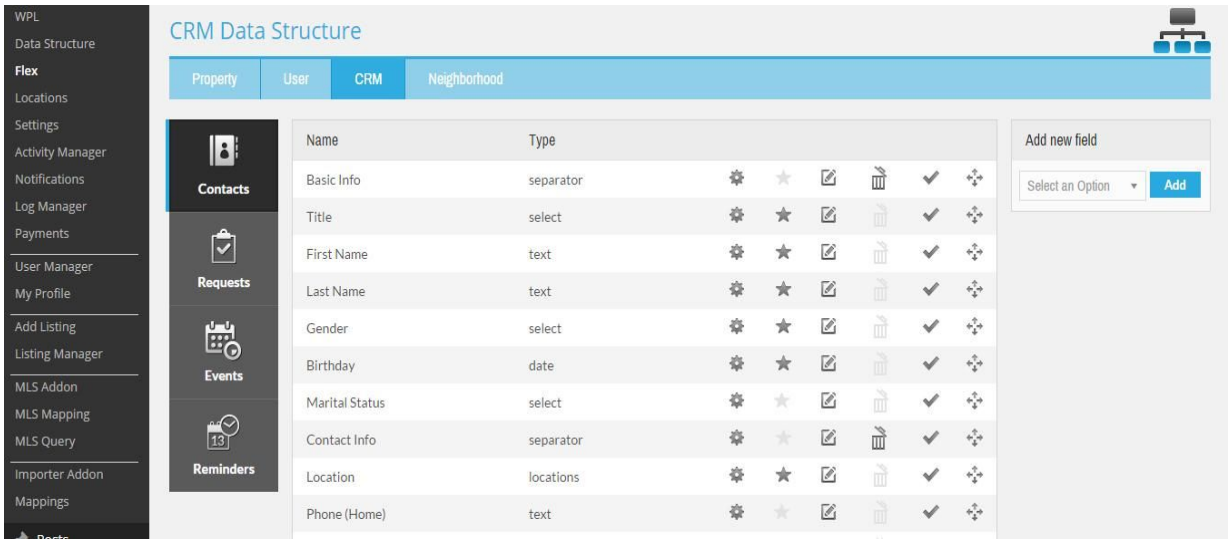
On this page, you will be able to set the access and limitations for some of the fields of the CRM for different users individually, regardless which group of membership the user belongs to.

For example, when you tick the checkbox of “View Other Contacts” for a user, he or she can see other agent contact information in the CRM, despite to which membership group it belongs to. You can also adjust the access of the users to the Add, Delete, Archive, Assignment or other important options of the CRM here.

Flex

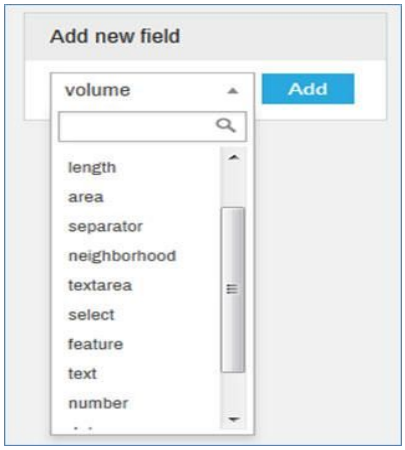
Path: Back-end > WPL Dashboard >Flex > CRM

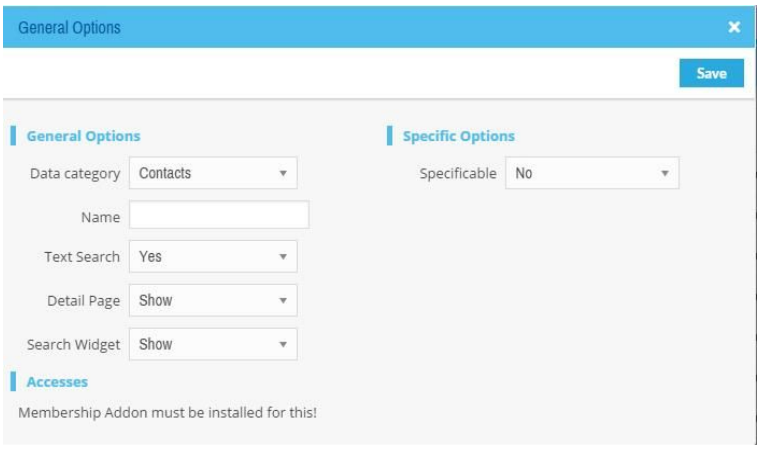
Flex allows you to easily customize your CRM data fields. You can add/edit/delete fields through this Add-on.



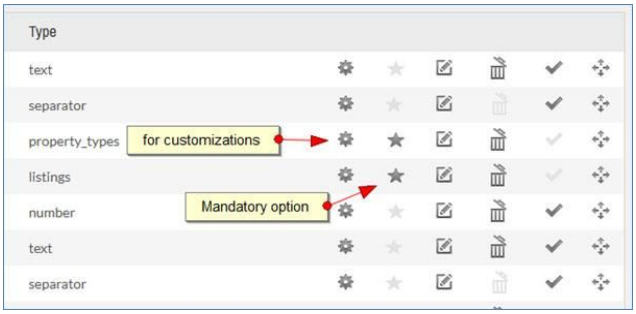
For example, if you want to have a select box (or text box) to add front-end information, which (by default) has not been included in the WPL, the Flex Menu can be used to create this field. Form elements such Title, First Name, Last Name, etc. can be made mandatory, enabled, or disabled with just a few clicks in the Flex function.

To add a new field in the information form of the Contact, Request, Events or Reminder pages in the WPL CRM you can select the type of field you need and then click on the "Add" button on the right side of the page. Each field type has its own parameters and will present a different form after making the selection.
For example, if you choose the "select" field type, you must specify multiple values for it. If you choose the "date" field type you must insert the date ranges in the Flex form.
By clicking on the Add button, a pop up form will open and you can fill it out.





To edit a field, click on the edit button and to make a field mandatory click on the star.



Note: *The gear icon in WPL is developed for customization purposes. By default, it has no purpose so it is not necessary to put any data in the gear icon if you do not need it.*

For more information, please read the Flex manual.

FAQ

1) **What is the CRM form link and Contact Agent module on the property details page?**

The Contact Agent module is for those who don't have the CRM add-on installed. The CRM add-on is an email-based system to gather information about client requests. The CRM is a feature-rich version of gathering information and managing leads.

2) **Are the fields in the CRM form customizable?**

Yes, you are welcome to customize the Contact and Request fields using the WPL's Flex add-on. You can add, disable, and/or remove fields.

3**) What is difference between the distribution method of leads generated from the normal CRM form and the one from the property page?**

For the leads generated from the normal CRM form there are two methods: the “Use Round Robin” and the “Managed by Lead Distribution Manager” for leads generated from the property details page. In addition to these two methods there is an “Assign to Property Owner” option as well. The Admin is able to set a method by referring to the settings in the backend.

4) **What happens if a lead has multiple requests? Should he or she fill out the Contact Info section on the CRM form several times?**

If a user registers and logs in, the contact info will remain the same (they can edit it if they want) but the request details will always generate a new form for them, to enable leads to send multiple requests.

5) **How can I remove the CRM link from the property details page?**

You can remove the CRM link by referring to the back-end > Activity manager