Real Estate Developers
CRM & ERP

Transform your property management, sales, and client interactions through H-Office, an integrated CRM and ERP platform tailored for real estate developers. From lead management and customer engagement to project oversight and financial tracking, H-Office empowers your teams to operate seamlessly, enhance productivity, and maximize performance—delivering a complete solution for every stage of your business.

Our Industry Solutions

H-Office offers a robust suite of solutions designed to provide seamless process automation and comprehensive information management tailored specifically for the real estate sector. With highly customizable features, our real estate CRM & ERP software is crafted to help Developers, Infrastructure Development Companies, Property Dealers & Consultants to streamline operations, improve client engagement, and enhance decision-making capabilities. In today's competitive landscape, technology is the key to success, and H-Office equips you with the tools to thrive.

Real Estate Development Solution

- ✓ Residential Realestate
- ✓ Commercial Real Estate
- ✓ Industrial Realestate
- ✓ Property Sales & Leasing
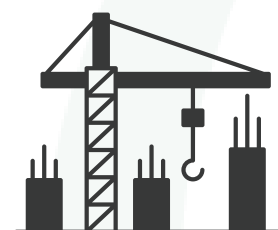
Infrastructure & Construction Solution

- ✓ Builders & Contractors
- ✓ Civil Engineering Firms
- ✓ Large-ScaleConstruction Projects
- ✓ Residential & Commercial Projects
- ✓ Urban Development Initiatives
- ✓ Multi-phase Real Estate Projects

Property Dealers

- ✓ Residential Dealers
- ✓ Commercial Dealers
- ✓ Industrial Dealers
- ✓ Land Dealers

Consultants

- ✓ Structurale Engineering Consulting Agencies
- ✓ Project Management Consulting Agencies
- ✓ MEP (Mechanical,Electrical, Plumbing) Consulting Agencies
- ✓ Geotechnical & Soil Testing Laboratories.
- ✓ Aarchitects & Interior Designers

Real Estate Workflow in CRM - Enhancing Efficiency from Lead Generation to Property Handover

1. Marketing Campaign Management
Streamline your marketing efforts with H-Office's comprehensive tools, including prospect data management, automated email, SMS, and WhatsApp campaigns, and integrated call center management.

2. Lead Generation
Effortlessly capture leads through H-Office's integration with social media, websites, and lead forms, along with seamless CSV imports for direct lead creation.

3. Lead Nurturing & Site Visit Management
Track and nurture leads with automated follow-ups, sales forecasting, and visit management to ensure personalized engagement and increased conversion rates.

4. Projects, Towers & Units Wise Inventory Management
Efficiently manage your projects and inventory with H-Office, including detailed tracking of towers and various unit types for optimal resource allocation.

5. Booking Reservations
Simplify property bookings and reservations within H-Office, allowing for efficient allotment and inventory management against booked units.

6. Documentation
Generate and manage essential documents like sales orders, identity proofs, and loan processing paperwork, alongside project-specific documents such as BU and RERA.

7. Payment Schedule Management
Stay on top of payment commitments with H-Office, tracking all payment dates, generating reports, and receiving timely advance payment reminders.

8. Billing & Accounting
Generate invoices effortlessly and manage all financial transactions with H-Office's integration with Tally, covering various voucher types and expense workflows.

9. Channel Partner's Payment Processing
Manage channel partner commissions and upto 2 levels of hierarchies directly within H-Office, defining standard rates and processing payments seamlessly.

10. Post-Sales Service
Provide exceptional post-sales support through ticket management and a mobile-responsive client support portal for handling complaints and queries efficiently.

Real Estate CRM: Add-on Modules

Property Portal Integration

Tally Integration

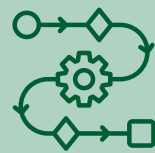Facebook & Instagram Lead Integration

Justdial Integration

Cloud Telephony & IVRS

Virtual Exhibition (Bharat Expo) Integration

E-Commerce & Project Website

Task Workflow Automation

Mobile Friendly Partner Portal

Mobile Friendly Customer Portal

Marketing Automation

Lead Management Mobile App & Website Integration

Challenges of Real Estate Developers - Manual Process Overload

In the real estate industry, developers face a multitude of challenges, particularly when managing multiple projects, clients, and sales processes without a CRM or ERP system. Without an integrated solution, developers often struggle with fragmented data, inefficient workflows, and miscommunication between teams. The manual handling of critical tasks like marketing, lead management, inventory tracking, and payment scheduling leads to errors, missed opportunities, and time-consuming processes. This not only affects the overall productivity but also hampers customer satisfaction. By relying on outdated methods, real estate developers risk losing valuable leads, failing to meet customer expectations, and having limited visibility into their business performance.

✓ Disorganized lead tracking and follow-ups
✓ Fragmented communication between sales, marketing, and operations teams
✓ Manual inventory tracking leading to errors and overbooking
✓ Inefficient document management (agreements, identity proofs, loan documents)
✓ Unstructured and missed payment schedules and reminders
✓ Difficulty in managing multiple projects simultaneously
✓ Limited visibility into financial performance and cash flow
✓ Slow and error-prone billing and accounting processes
✓ Challenges in managing channel partner commissions and collaboration
✓ Inability to track and measure marketing campaign performance
✓ Inefficient slow post-sales service and ticket management
✓ Inconsistent reporting and decision-making due to fragmented data
✓ Difficulty in managing compliance with real estate regulations (e.g., RERA, GST)
✓ Time-consuming manual processes reducing overall productivity

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Company Overview

At H-Office, we are driven by a vision to provide generation next technology solutions that empower businesses to compete with global counterparts. With a deep-rooted belief in the idea of empowering businesses through streamlined, cost-effective, and scalable solutions, we have embarked on a journey to revolutionize the way organizations address their complex requirements. With a strong foundation built on over 30 years of experience working across diversified industries, overcoming geographic barriers, and understanding the intricate challenges businesses face, we are committed to delivering solutions that stand out in a competitive landscape.

About H-Office

H-Office, developed by the award-winning Horus Tech Solutions Private Limited, is a comprehensive business management suite that has been trusted by over 100 industries globally. Drawing from over 30 years of experience, H-Office has been refined to meet the diverse needs of various sectors, including real estate. With our cutting-edge CRM and ERP software, we offer solutions that streamline operations, enhance client interactions, and simplify complex workflows for real estate industry.

Our real estate optimization efforts ensure that developers can efficiently manage lead generation, client engagement, inventory tracking, and post-sales service—all within one unified platform. Tailored specifically for the real estate industry, H-Office empowers developers to achieve greater operational efficiency, boost sales performance, and deliver exceptional customer experiences.

As an award-winning solution, H-Office continues to innovate and adapt to industry needs, ensuring real estate professionals are equipped with the latest tools to thrive in a competitive marketplace.

H-Office ERP Moments
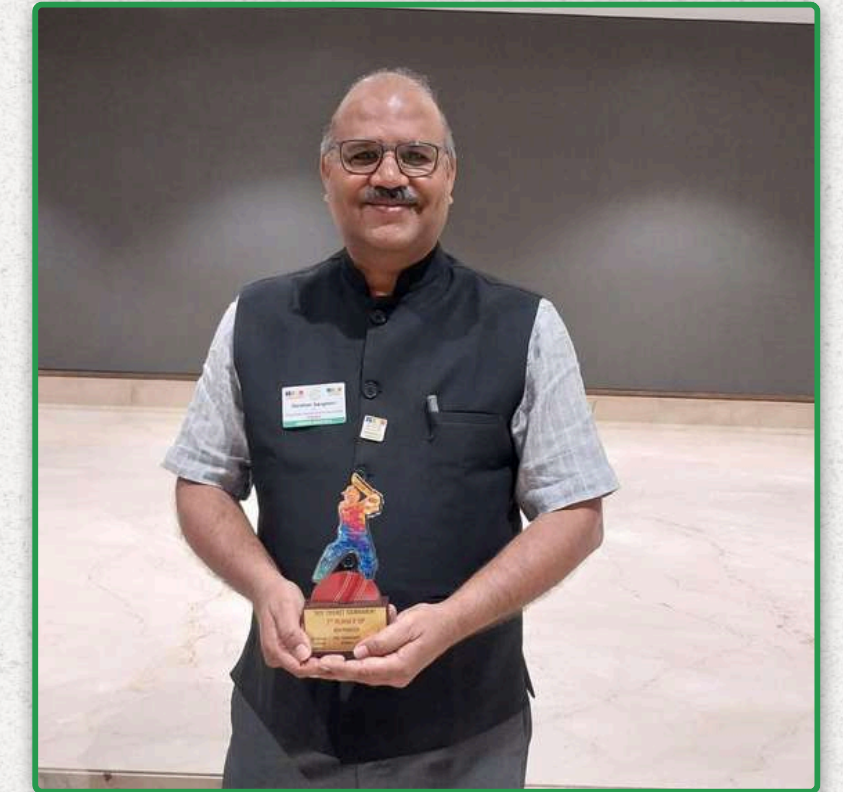
Comprehensive CRM & ERP Software Tailored for Various Industries, Optimized for Real Estate

H-Office, a versatile CRM & ERP software suite, is crafted to serve a wide range of industries, with a special focus on optimizing the experience for Real Estate and Construction businesses. H-Office facilitates efficient management of business processes, offering end-to-end solutions to streamline operations, enhance client interactions, and support informed decision-making. With real-time data and analytics, H-Office empowers businesses to optimize costs, improve process efficiency, and make strategic decisions.

Designed with flexibility in mind, our solution helps developers, contractors, and infrastructure firms manage complex business functions seamlessly. The intuitive interface and robust reporting tools ensure you always have a clear, comprehensive view of your projects, allowing for enhanced operational control and business growth.

H-Office provides solutions that are adaptable and scalable, optimized to meet the unique demands of the Real Estate sector without compromising its multi-industry functionality.

Why H-Office CRM & ERP is the Best for Real Estate Developers?

H-Office CRM & ERP for Real Estate is designed to meet the evolving demands of the real estate and construction industry. Built with cutting-edge cloud technology, AI capabilities, and advanced process automation, H-Office offers a comprehensive solution for real estate developers. Developed by experts with deep industry insights, our software integrates seamlessly into real estate workflows, delivering a competitive edge. With features like biometrics integration, IOT Integrations, and digital media integration, H-Office ensures that your projects run efficiently and smoothly. From consultation to implementation, our end-to-end support ensures a successful experience, making H-Office the preferred choice for real estate professionals.

Marketing Automation

Elevate your sales and marketing game with H-Office's comprehensive CRM solution. Seamlessly manage leads, automate marketing campaigns, track customer interactions, and drive revenue growth. Harness the power of data-driven insights to make informed decisions and build lasting customer relationships.

Leads & Opportunities Management

Capture, track, and manage property leads efficiently. Automate lead follow-ups, nurture client relationships, and convert leads into closed deals.

✓ **Custom Lead Forms:** Integrate web-to-lead forms specific to property inquiries.

✓ **Lead Segmentation:** Categorize leads by property type, budget, and region.

✓ **Real-Time Lead Notifications:** Get instant updates on new inquiries and follow-ups.

✓ **Opportunity Tracking:** Manage and track potential deals with clear visibility of the sales pipeline.

✓ **Inquiry Source Tracking:** Understand where your best leads come from, whether via real estate portals, social media, or referrals.

Follow-up Management for Prospective Buyers & Leads

Keep prospective buyers engaged with timely follow-ups across multiple communication channels. Never miss an opportunity to close a deal.

✓ **Customizable Follow-up Fields:** Tailor fields specific to real estate transactions like property type, budget, and financing stage.

✓ **Multiple Channels:** Follow up via email, SMS, WhatsApp, or phone.

✓ **Dynamic Outcome Tracking:** Record outcomes of each interaction, allowing sales agents to prioritize high-potential leads.

Multiple Sales Funnel Management

Optimize your sales strategy with dedicated funnels for different property types or sales types.

✓ **Tailored Sales Funnels:** Create separate funnels for residential, commercial, luxury, or under-construction properties.

✓ **Detailed Sales Forecasting:** Forecast sales value, segment-wise performance, and probability analysis for informed decision-making.Dynamic Outcome Tracking

✓ **Sales Performance Insights:** Identify the most profitable property segments and improve conversions.

Prospect Center for Real Estate Buyers and Investors

The Prospect Center is a centralized hub for managing a database of prospective buyers, investors, and partners collected from sources like your website, events, exhibitions, walk-ins, and real estate portals. It organizes contacts by their category & demographic details for enabling targeted campaigns such as telecalling, email, and SMS. This streamlined approach helps nurture prospects effectively, turning them into qualified leads and ensuring an efficient sales process.

✓ **Prospect Categorization:** Segment prospects based on criteria like investment potential, property type preference, and project stage.

✓ **Key Account Manager Assignment:** Assign property managers or sales agents to high-priority clients.

✓ **Source Tracking:** Understand where your best Prospects come from, whether via real estate portals, social media, or referrals.
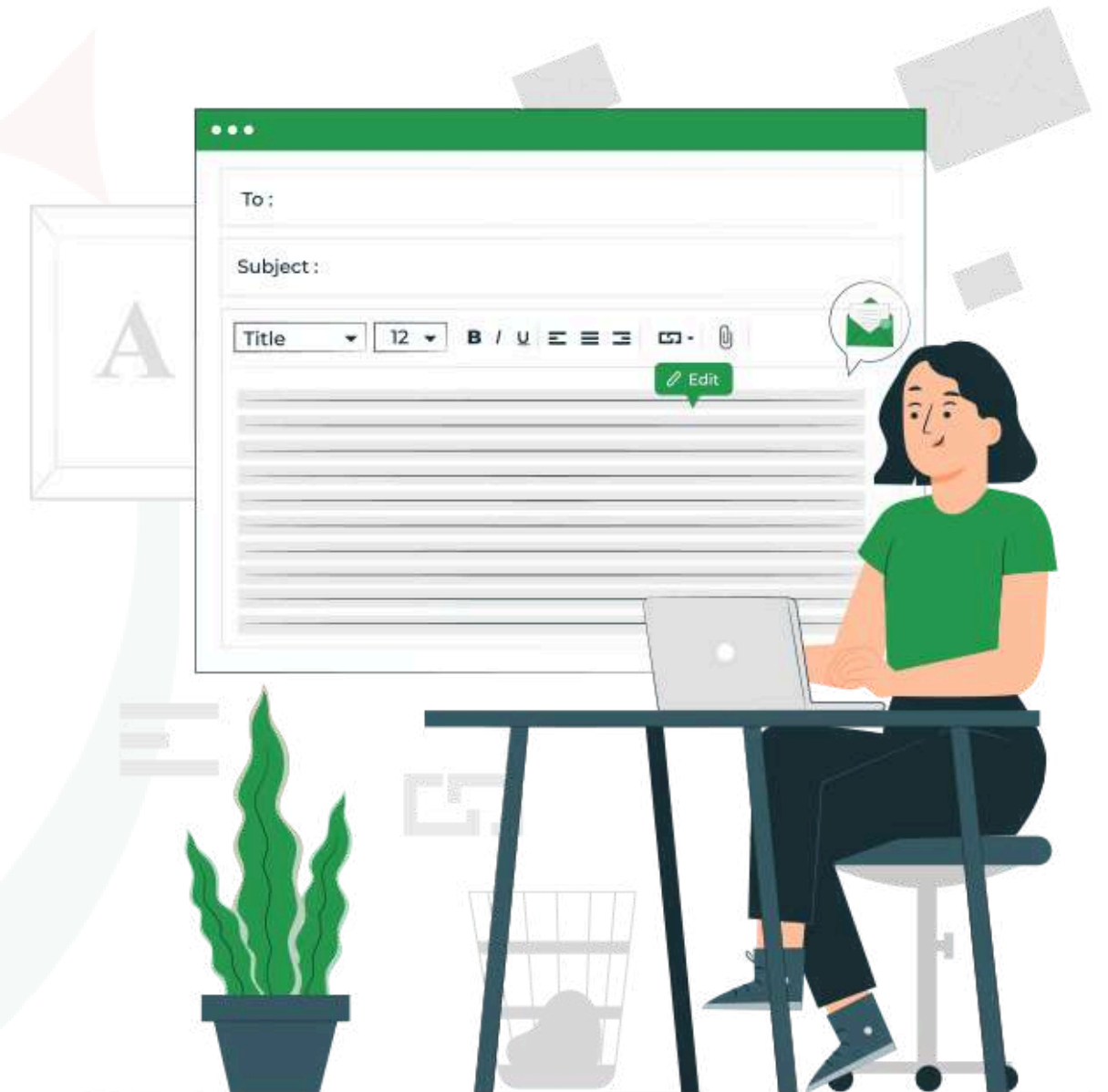
Email Campaigns for Real Estate Marketing

Enhance your outreach efforts with targeted email campaigns designed to promote new projects, open house events, and property offers.

✓ **Campaign Management:** Manage and track email campaigns targeted to specific buyer profiles.

✓ **Template Management:** Use real estate-specific templates for property listings, project updates, and client nurturing.

✓ **Campaign Performance Analytics:** Measure the effectiveness of each campaign and optimize future outreach.

Disclaimer:
In accordance with the CAN-SPAM Act and related guidelines, it is the client's responsibility to ensure compliance with all regulations governing email campaigns. This includes obtaining necessary permissions, managing unsubscribe options, and adhering to content requirements. Our service facilitates the execution of email campaigns, but compliance with these legal and technical obligations must be handled independently by the client.

SMS Campaigns for Quick Engagement

Send bulk SMS updates about new property listings, price reductions, or open house reminders to keep your prospects engaged.

✓ **Template Customization:** Use ready-to-go templates tailored for real estate.

✓ **Scheduled SMS Campaigns:** Schedule and automate SMS updates for specific developments or projects.

Disclaimer:

As per the TRAI guidelines, all responsibilities related to DLT registration, DLT login creation, header approvals, and custom template approvals rest with the client. These processes and technical requirements must be managed independently by the client, as they are not within the scope of our service. Please ensure compliance with the necessary regulations to facilitate the smooth execution of SMS campaigns.

WhatsApp Campaigns for Real-Time Communication

Leverage WhatsApp for sending timely updates, answering client queries, and sharing property details in real-time.

✔ **WhatsApp Alerts:** Notify potential buyers about project milestones, new listings, or promotions.

✔ **Campaign Scheduling:** Automate messages to maintain continuous client engagement.

Disclaimer:

For WhatsApp campaigns, it is the client's responsibility to adhere to all applicable guidelines and policies set by WhatsApp, including ensuring proper usage to avoid number blocking or account restrictions. Our service provides the tools to facilitate WhatsApp messaging, but managing compliance, obtaining necessary permissions, and addressing any technical or policy-related issues remain the client's responsibility.

Advanced Analytics for Real Estate Projects

Make data-driven decisions with real-time analytics on lead generation, client engagement, and project performance.

✓ **Lead and Sales Insights:** Get actionable insights on lead sources, conversion rates, and property preferences.

✓ **Forecasting & Predictive Analytics:** Predict sales trends and analyze the performance of various property types.

✓ **Custom Dashboards:** Monitor key performance with our customized sales dashboard & gadgets.

Marketing Automation Workflow (Add-On)

Take control of your client outreach with automated email and WhatsApp campaigns tailored for property marketing. Developers can nurture leads, communicate with buyers, and schedule follow-ups, ensuring higher engagement and successful conversions.

✓ Automated Email Campaigns for Property Promotions

✓ WhatsApp Message Automation for Site Visit Reminders

✓ Customizable Campaign Schedules for Targeted Outreach

✓ Personalized Content for Different Buyer Segments

✓ Dynamic Messaging for Client Preferences
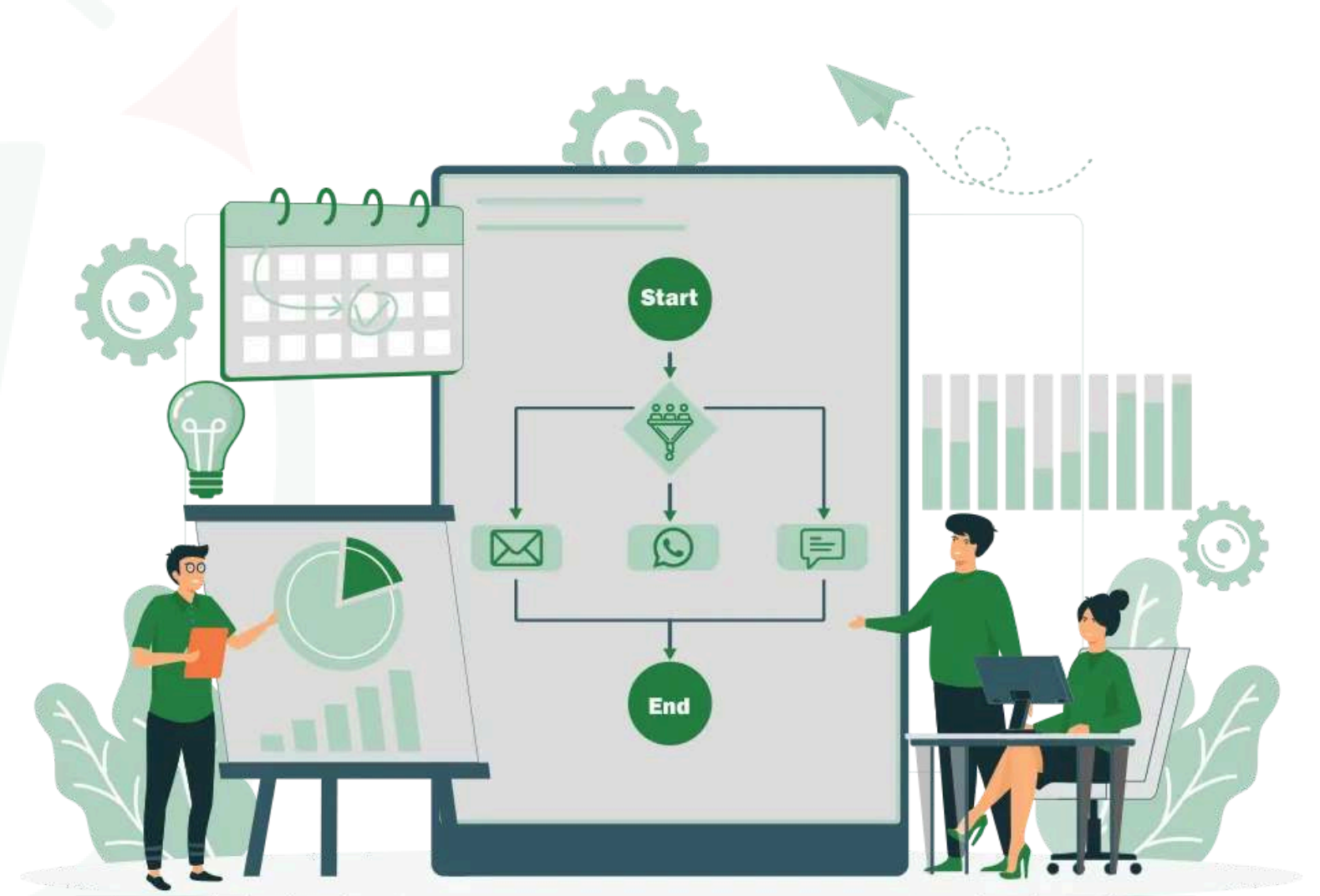
Lead Management Mobile App (Add-On)

Enable your sales team to track, manage, and convert leads from anywhere with the Lead Management Mobile App. Tailored for the real estate sector, this mobile solution integrates seamlessly with your CRM to provide real-time updates, ensuring you never miss an opportunity.

✓ Real-time Lead Status Updates

✓ Lead Assignment by Project/Location

✓ Contact & Opportunity Tracking for Buyers

✓ Task & Appointment Management

✓ Email & Offline Integration

✓ Push Notifications for Follow-ups

✓ GPS-enabled Site Visit Tracking

Project Time Tracking (Add-On)

Ensure accurate tracking of time spent on various real estate projects, whether it's construction phases or sales campaigns. This feature enables developers to monitor time investments and ensure deadlines are met, improving accountability across projects.

✓ Project-specific Time Tracking

✓ Punch In/Out for Site Personnel

✓ Real-time Attendance Reporting for On-Site Teams

✓ Automated Break Tracking

Task Workflow Automation (Add-On)

Enhance project efficiency by automating complex workflows in real estate operations, from site surveys to construction and sales. This module ensures that critical tasks are assigned, tracked, and completed in a timely manner, streamlining project milestones and resource allocation.

- ✓ Automated Task Triggers for Development Stages
- ✓ Task Priority & Weightage Management
- ✓ Configurable Workflows for Departments & Teams
- ✓ Precedence & Time Allocation for Construction & Sales Tasks
- ✓ Real-time Resource Reassignment for Unforeseen Changes
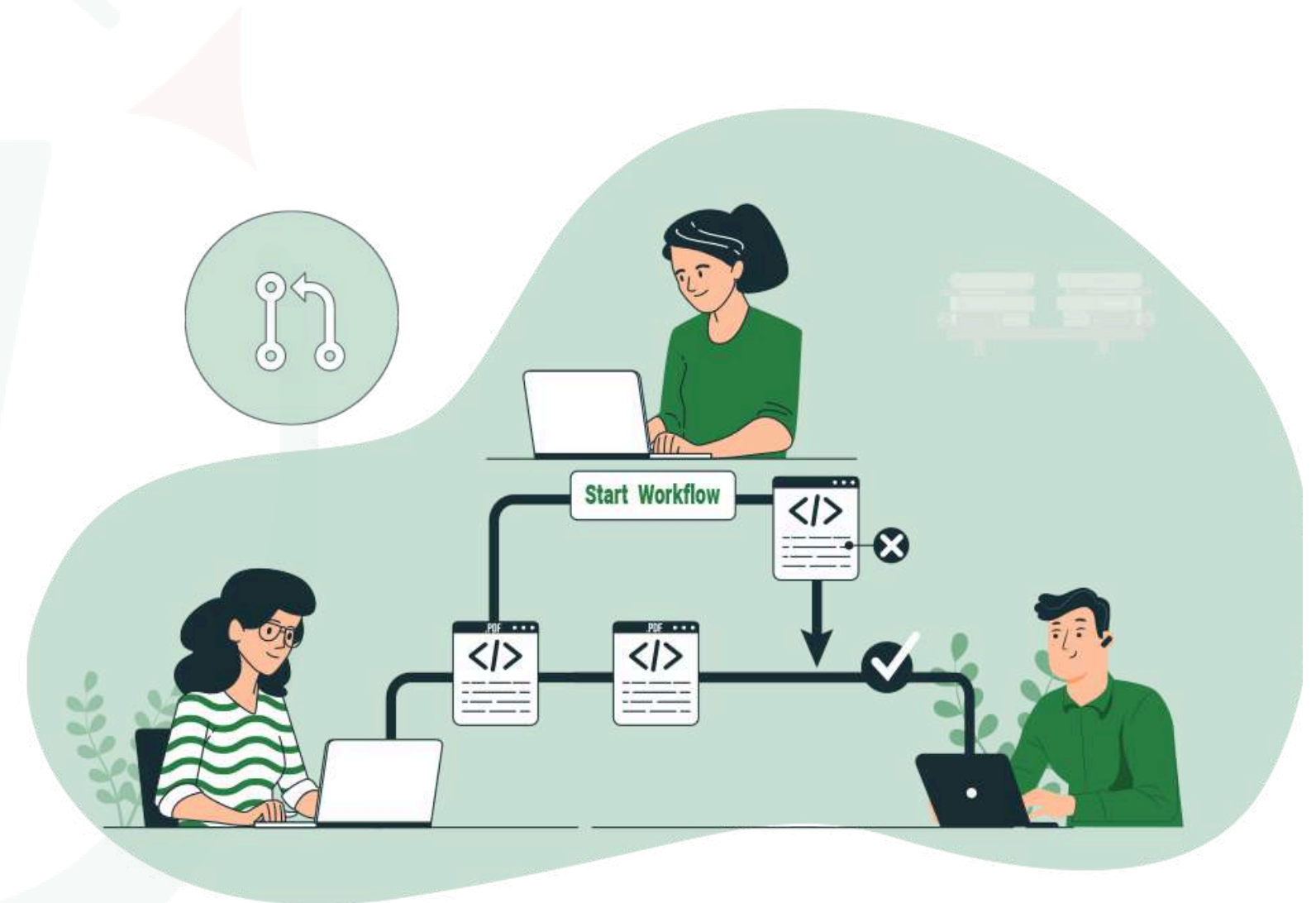
IVRS & Cloud Telephony (Add-On)

Enhance communication with buyers, contractors, and team members using IVRS and Cloud Telephony. Automate call routing to sales or support teams, ensuring quick response times and improving client relationships.

✓ Automated Call Routing for Client Inquiries

✓ Cloud-based Call Flexibility for On-Site & Remote Teams

✓ Call Recording & Analytics for Buyer Interactions

✓ Integrated Communication with CRM & Sales Tools

24/7

Social Media Integrations (Add-On)

- **Facebook & Instagram** Seamlessly capture leads from Facebook and Instagram campaigns, automatically populating them into H-Office CRM for effortless lead management and follow-up.

Facebook

Instagram

Email Marketing Integrations (Add-On)

- **Mailchimp & Aweber** Integrate H-Office with Mailchimp and Aweber to automatically sync contacts and leads, ensuring seamless email marketing campaigns. Manage automation workflows, lists, and lead nurturing directly from within H-Office.

Mailchimp

Aweber

Communication Integrations (Add-On)

- **WhatsApp & SMS** Effortlessly communicate with leads and clients via WhatsApp and SMS, directly from H-Office. Simplify your outreach by sending messages, updates, or alerts without leaving the platform.

- **Missed Call Integration** Turn every missed call into an actionable opportunity, automatically converting them into leads or support tickets, ensuring no business opportunities are lost.

WhatsApp

SMS

Missed Call Integration

Productivity & Document Management (Add-On)

- **Microsoft Word & Excel** Customize document formats for quotes, invoices, and POs using Word templates. Easily import/export data with Excel integration, enhancing reporting and analysis.

- **Acrobat PDF** Generate and share reports, invoices, and documents in PDF format with ease, ensuring smooth document handling across your business.

Microsoft Word

Excel

Acrobat PDF

Sales Automation

H-Office's Sales Automation module revolutionizes the way real estate businesses manage their sales processes. By integrating advanced tools for quotation generation, sales order management, finance tracking, and direct sales management, it streamlines operations from lead capture to deal closure. With customizable workflows, real-time profitability insights, and dynamic pricing capabilities, this module empowers developers and brokers to enhance efficiency, improve client experiences, and drive business growth in a competitive market.

Quotation Automation for Properties

In real estate, delivering clear and accurate quotations is key to building client trust. H-Office's Quotation Automation allows you to create project-specific quotes with dynamic pricing and detailed calculations. Automate approvals and customize formats to fit various property types and client requirements, helping you close more deals efficiently.

✓ Custom Quotation Formats for Property Sales/Rental

✓ Dynamic Masters for Property Specifications

✓ One-Click Quotation Copy for Repeated Clients or Projects

✓ Quotation Revision Tracking for Multiple Property Negotiations

✓ Lead-to-Quotation Automation for New Buyers

✓ Multiple Pricelist Management for Different Property Categories

✓ Auto Discounting for Early Buyers or Bulk Purchases

✓ Approval Workflow for Sales Teams & Management

✓ Real-time Profitability Calculator for Property Deals

✓ Auto Tax Applicability for Property Transactions

Attachment Options for Blueprints, Contracts, and Documents

✓

Sale Deed Management for Property Bookings

H-Office's Sale Deed Management helps real estate developers simplify property bookings and sales tracking. Design professional sales agreements, manage multiple transactions, and ensure every step from offer to contract signing is streamlined and efficient.

✓ Microsoft Word Integration for Custom Sales Agreements

✓ Proforma Invoice Format for Property Bookings

✓ Dynamic Masters for Terms & Conditions Based on Real Estate Law

✓ One-Click Copy of Sales Orders for Repeat Buyers

✓ Sale Deed Revision for Contract Changes

✓ Quotation to Sale Deed Automation for Quick Property Finalization
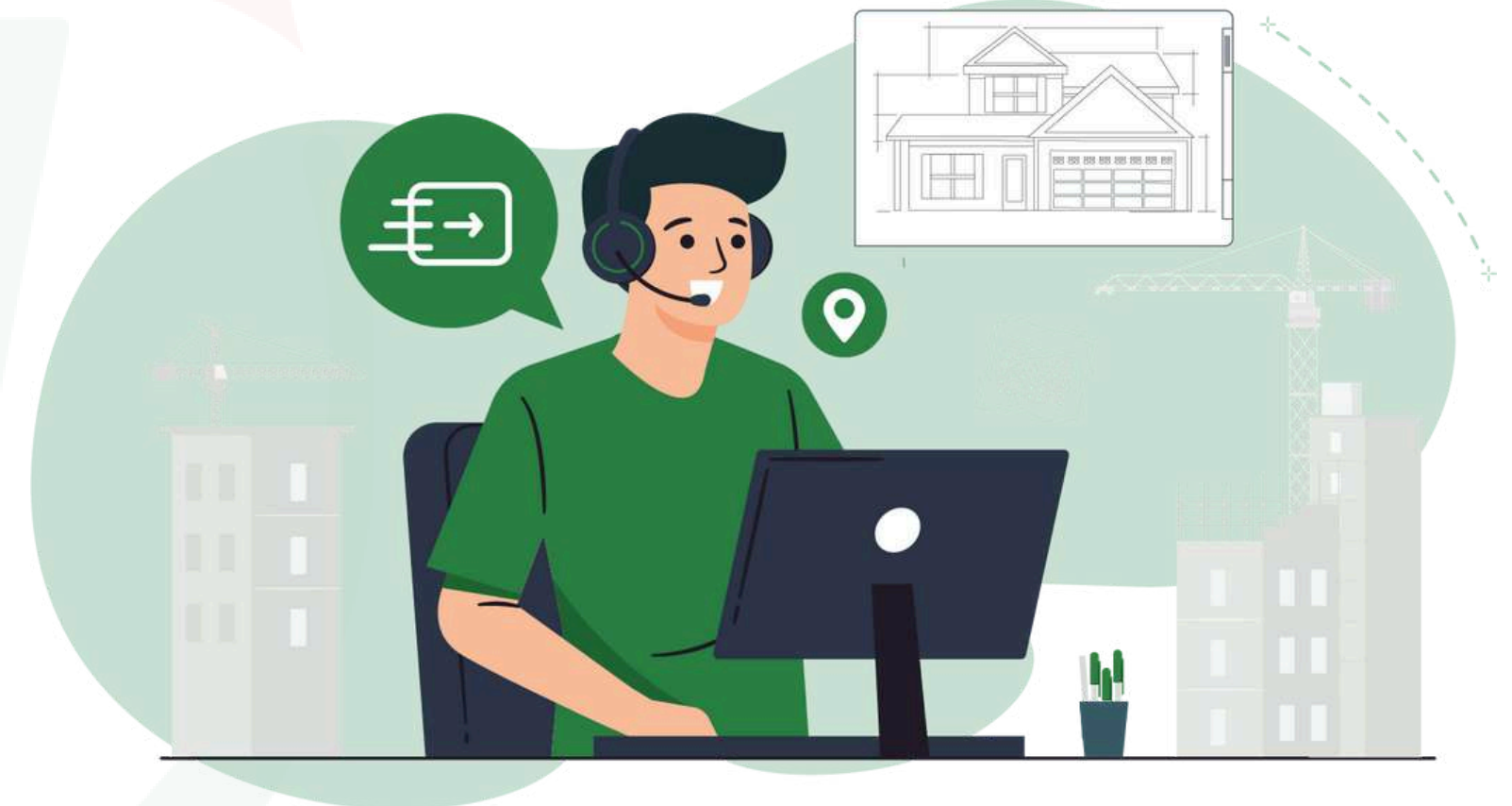
Sales Accounting for Real Estate Transactions

H-Office's Sales Accounting module provides real estate developers with robust tools to manage invoices, payment schedules, and financial tracking. With support for multiple payment plans and automated invoicing for property bookings, you can easily manage buyer payments, track outstanding amounts, and ensure compliance with real estate financial regulations.

✓ Multiple Invoice Type Management for Property Sales, Rentals, and Installments

✓ Party & Property-Wise Sales Preferences (e.g., Commercial vs. Residential Properties)

✓ Dynamic Masters for Terms, Cover Letters, and Legal Annexures for Property Transactions

✓ One-Click Copy & Edit Invoice for Recurring Payments

✓ Multiple Pricelist Management for Different Projects and Locations

Property Deal Placement & Management

H-Office CRM & ERP enables brokers and master brokers to place and manage property deals efficiently. Key functionalities include:

✓ **Deal Placement by Brokers & Master Brokers:** Once KYC is complete, brokers can easily place investment orders on behalf of investors, simplifying the process for all parties involved.

✓ **Backend Deal Processing:** The parent company's admin team manages deal execution, ensuring accurate and timely processing for real estate investments.
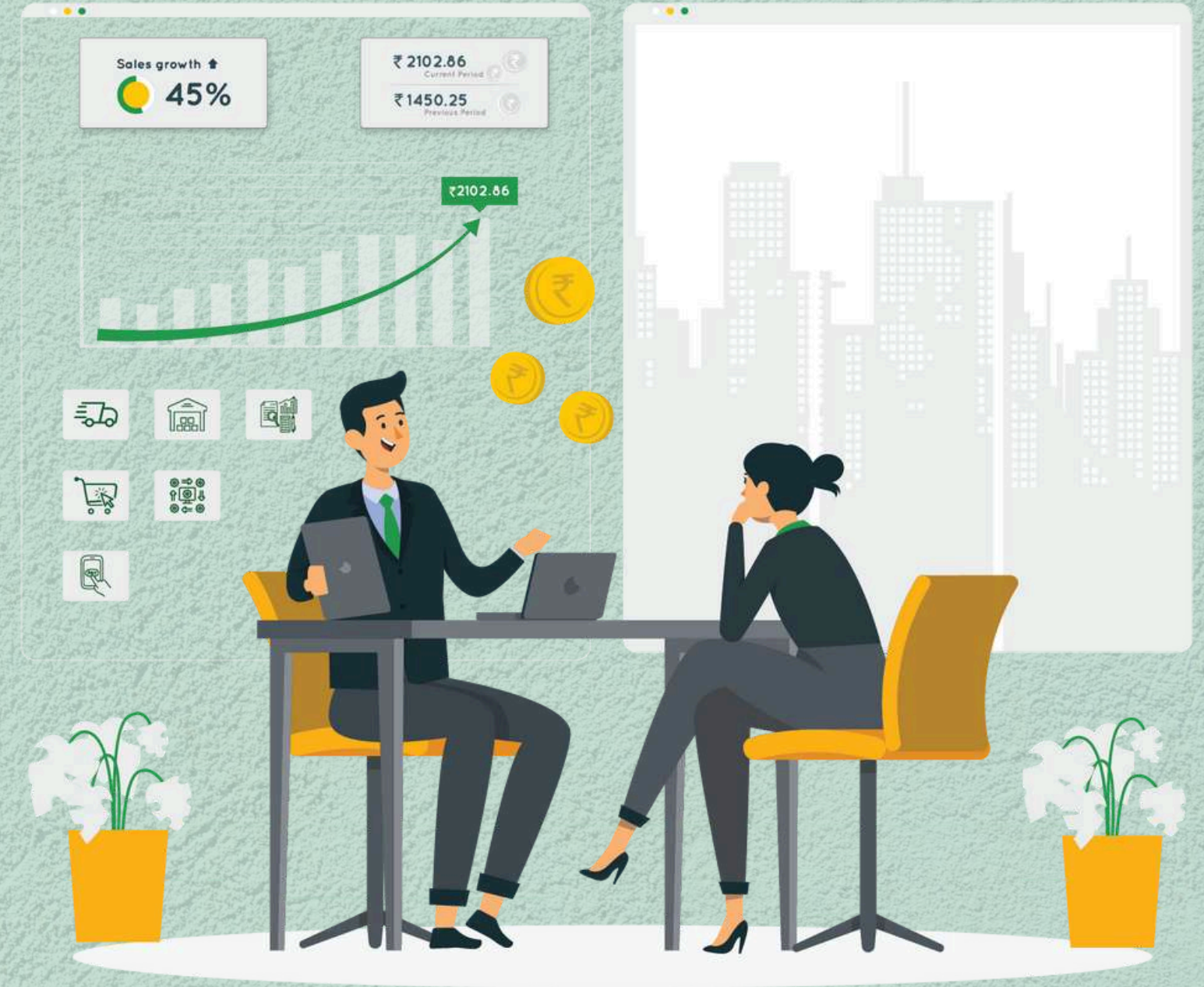
Attribute Management (Add-On)

Efficiently manage property listings with customizable attributes such as location, square footage, and price. This module simplifies the process of generating property offers, tracking inventory, and delivering personalized experiences to buyers.

✓ Real-time Attribute-Based Product Management

✓ Customizable Fields (Location, Unit Size, Price, etc.)

✓ Barcode Printing for Property Documentation

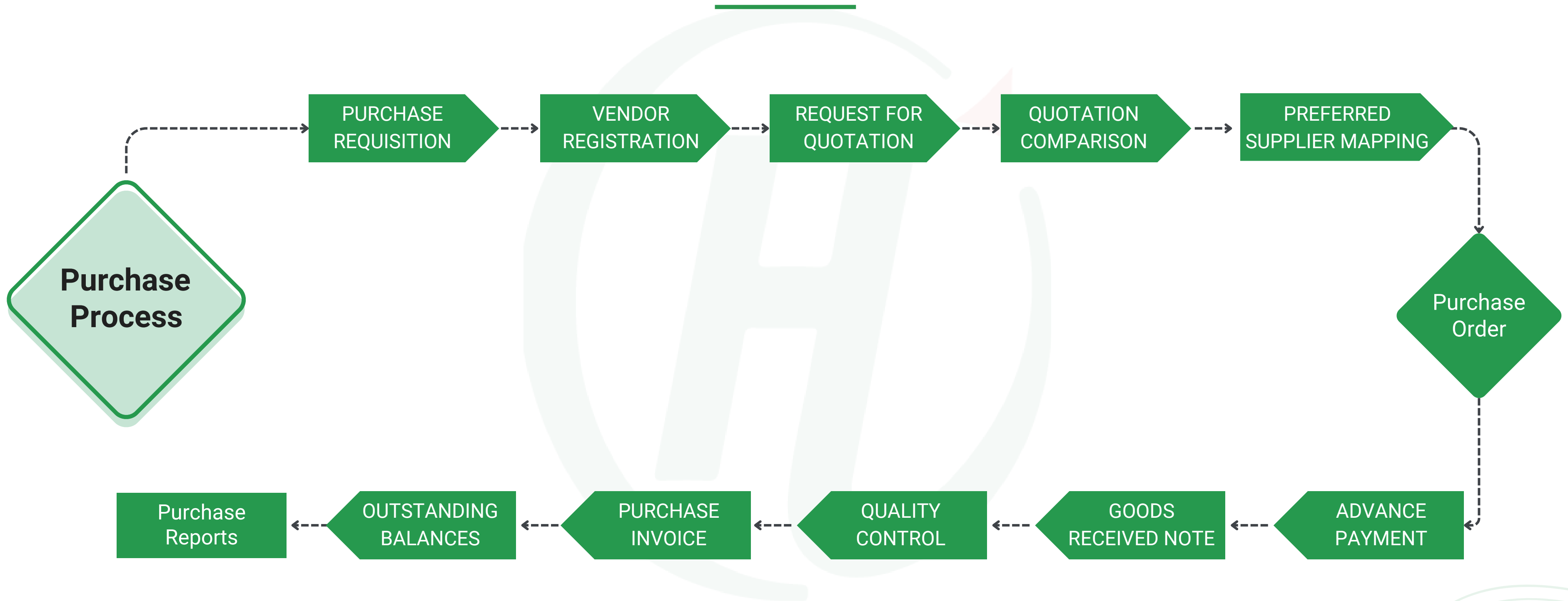✓ Seamless Integration into Invoicing & Reporting

ERP

At H-Office, we redefine business management with cutting-edge ERP solutions, streamlining operations and empowering data-driven decisions. Our tailored features, like Purchase Automation, simplify procurement in construction projects by managing requisitions, purchase orders, vendor quotes, and payments efficiently. Advanced tools such as approval workflows and real-time inventory updates ensure transparency and help projects stay on schedule and within budget. With robust Inventory Management for tracking raw materials and finished goods, H-Office ERP drives seamless operations, empowering businesses to reach new heights.

Purchase Process in H-Office

Purchase Process → PURCHASE REQUISITION → VENDOR REGISTRATION → REQUEST FOR QUOTATION → QUOTATION COMPARISON → PREFERRED SUPPLIER MAPPING → Purchase Order → ADVANCE PAYMENT → GOODS RECEIVED NOTE → QUALITY CONTROL → PURCHASE INVOICE → OUTSTANDING BALANCES → Purchase Reports

Purchase Order

H-Office's Purchase Order functionality makes it simple to create, track, and manage orders for real estate projects, with features that ensure a smooth and efficient ordering process. This module supports tracking order status for construction materials, managing vendor and supplier details, and generating comprehensive reports essential to real estate workflows. Real-time updates keep you informed about the progress of each order, while automated notifications help you stay on top of important project milestones. With H-Office, ordering for real estate projects becomes more organized and seamless.

✓ Approval Workflow for Real Estate Purchase Orders

✓ Microsoft Word Integration for Custom Formats Specific to Real Estate Requirements

✓ Dynamic Terms & Conditions, Cover Letters, and Product Annexures Tailored to Real Estate Projects

✓ One-Click Copy and Edit/Revise Options for Purchase Orders on Building Materials

✓ Multiple Print Options for Real Estate-Specific Purchase Orders

✓ Real-Time Stock Availability of Construction and Building Supplies

✓ Auto Tax Applicability Based on Vendor and Product Specifications for Real Estate

✓ Options for Attaching Project Documents, Site Images, Tasks, and Other Project-Related Files
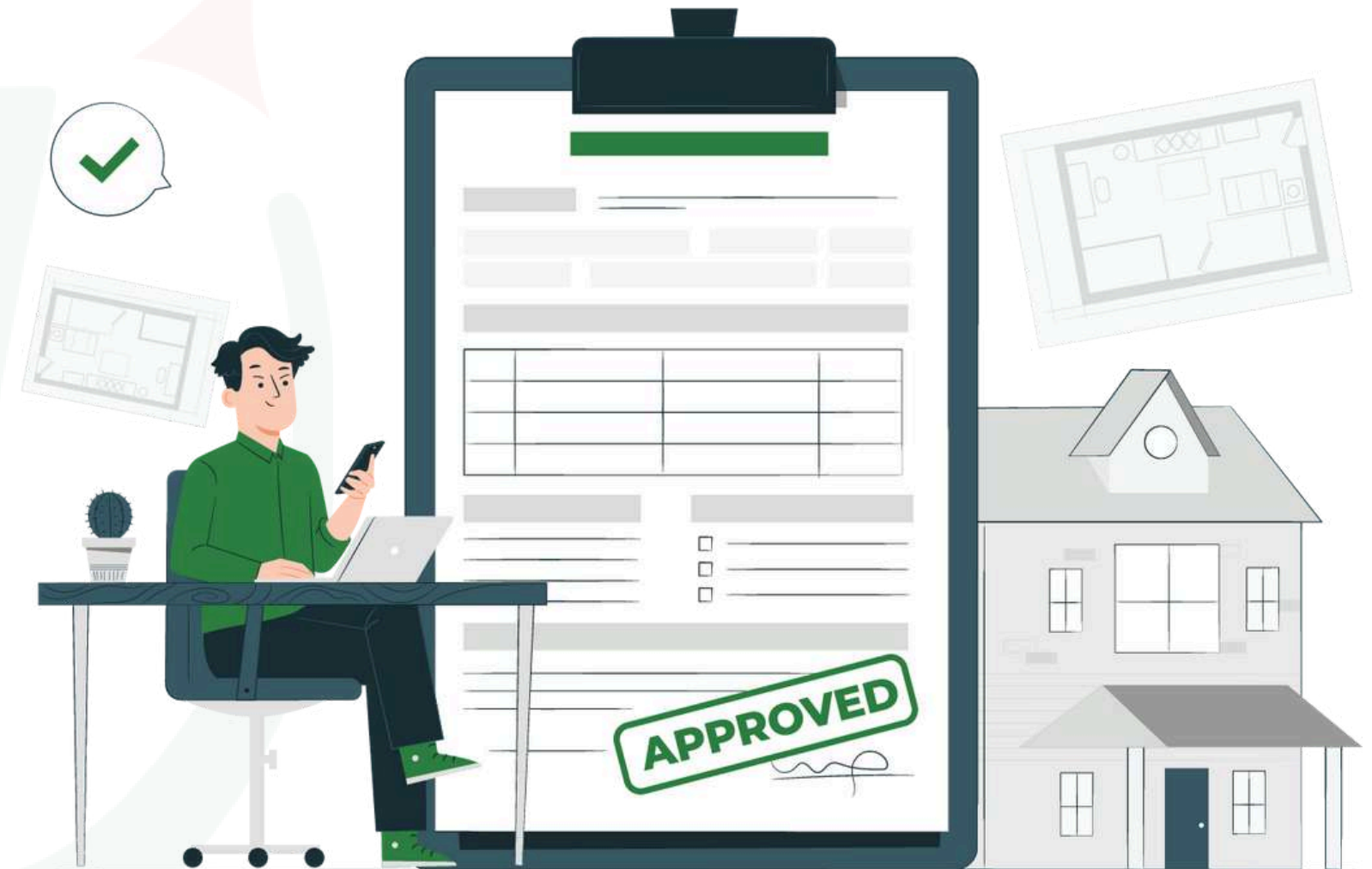
Approval Workflows

H-Office's Approval Workflow feature provides a solution tailored to the needs of real estate projects, making it easy to manage and track approvals at every stage of development. With intuitive tools and automation, it simplifies decision-making processes and ensures that approvals are timely and consistent. Key features include customized approval chains specific to real estate workflows, automated notifications for project-critical decisions, and real-time tracking to keep projects on schedule. The system promotes transparency and accountability, with detailed audit trails and compliance tracking for all approvals.
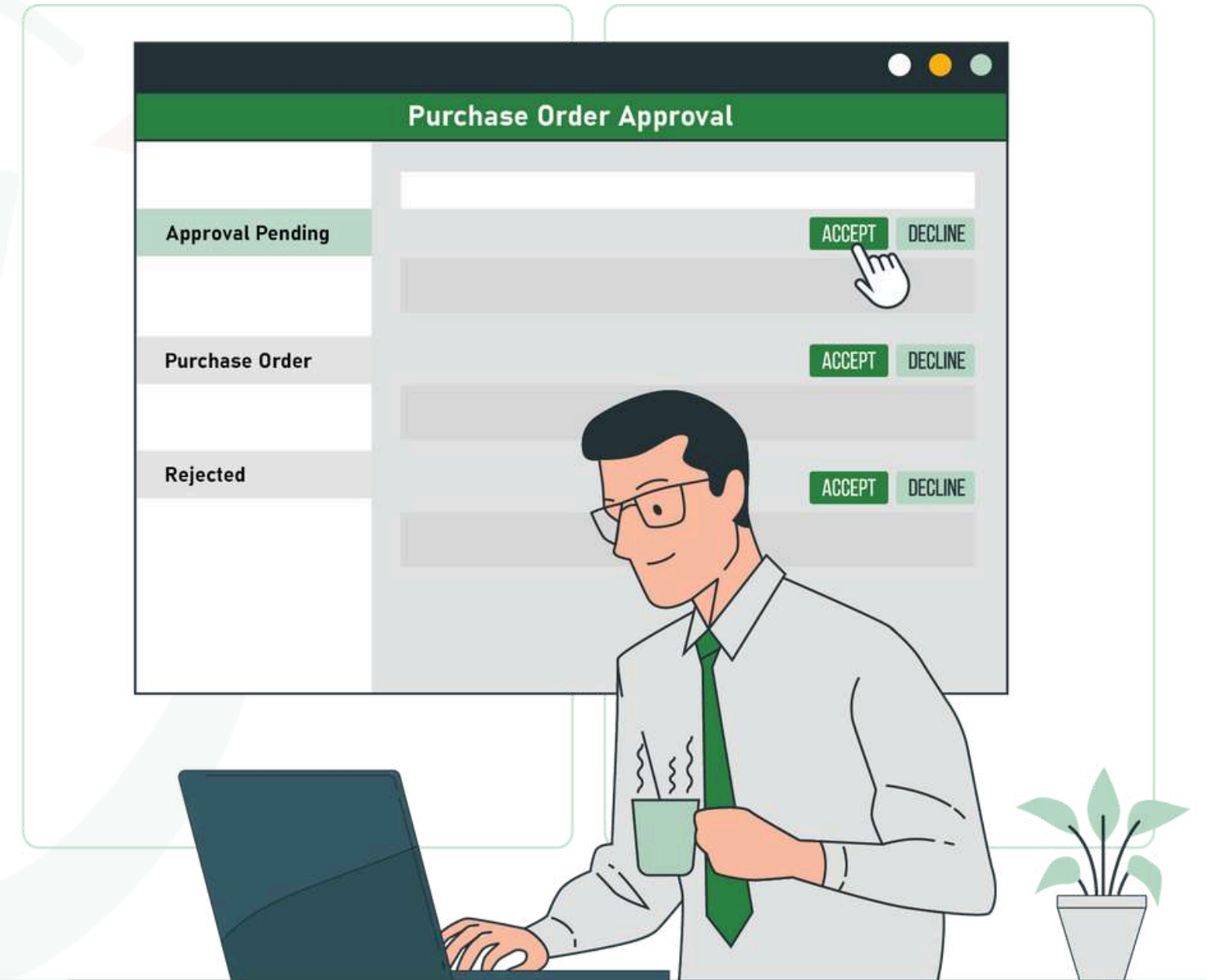
Material Inward

The Material Inward functionality in H-Office streamlines the management of materials delivered to real estate projects, going beyond simple documentation to provide a comprehensive solution for handling materials upon receipt. This feature ensures smooth material processing, from generating Goods Received Notes (GRN) to updating inventory and reconciling invoices. Real-time status tracking ensures that project teams are always informed of material arrivals and quantities, while post-payment material management keeps procurement operations efficient and transparent.

✓ Goods Received Note (GRN) Generation for Construction Materials and Supplies

✓ Real-Time Inventory Updates for Building Materials and Project Resources

✓ Invoice Reconciliation for Real Estate-Specific Purchases

✓ Tracking Material Deliveries Against Project Milestones

✓ Streamlined Post-Payment Management of Construction Material

✓ Maintaining Accurate Records for Real Estate Material Transactions

✓ Optimized Procurement Operations for Timely Delivery of Project Resources
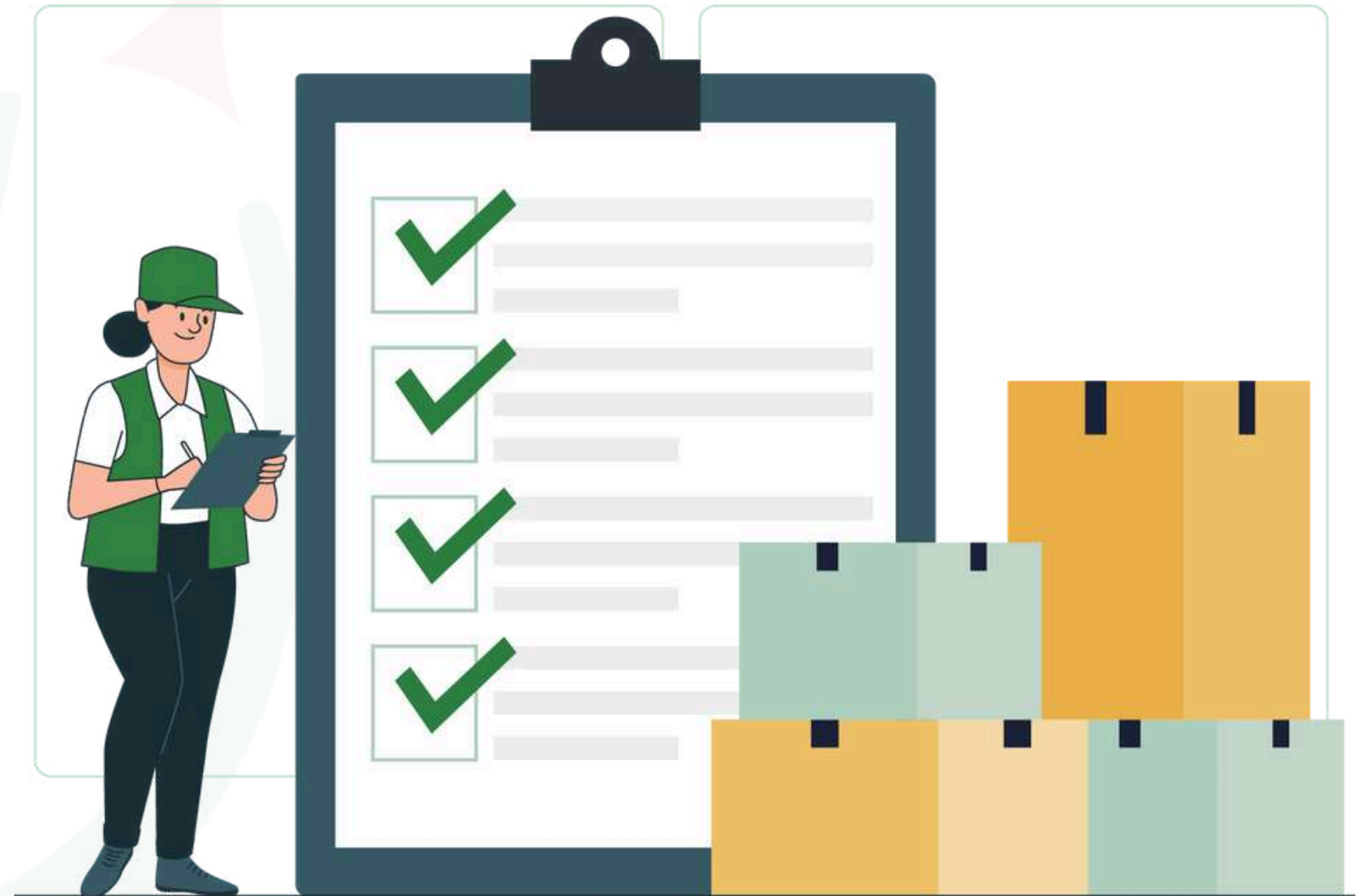
Purchase Invoice & Payments

H-Office offers a comprehensive solution for managing purchase invoices and payments, specifically tailored for real estate projects. The system simplifies the invoice generation process by pulling data directly from purchase orders, reducing manual entry and minimizing errors. Once invoices are generated, users can track payment status, reconcile transactions, and ensure that project costs remain on budget. H-Office ensures a seamless workflow for real estate procurement, from material purchases to payment processing, optimizing operations and maintaining accuracy.

✓ Customized Purchase Order and Invoice Formats for Real Estate

✓ Dynamic Terms & Conditions for Building Materials and Services

✓ Purchase Transaction Locking for Construction Materials

✓ Multiple Invoice Printing Options for Real Estate Transactions

✓ Auto Tax Applicability for Vendor-Specific Purchases

✓ Material and Payment Schedule Planning for Real Estate Projects

✓ Multiple Invoice Types for Construction Services

✓ Vendor & Product-Specific Preferences for Purchases

✓ Purchase Order to Invoice Automation for Construction Materials

✓ Warranty Tracking for Real Estate Equipment and Materials

✓ Invoice vs. GRN Imbalance Tracking for Material Deliveries
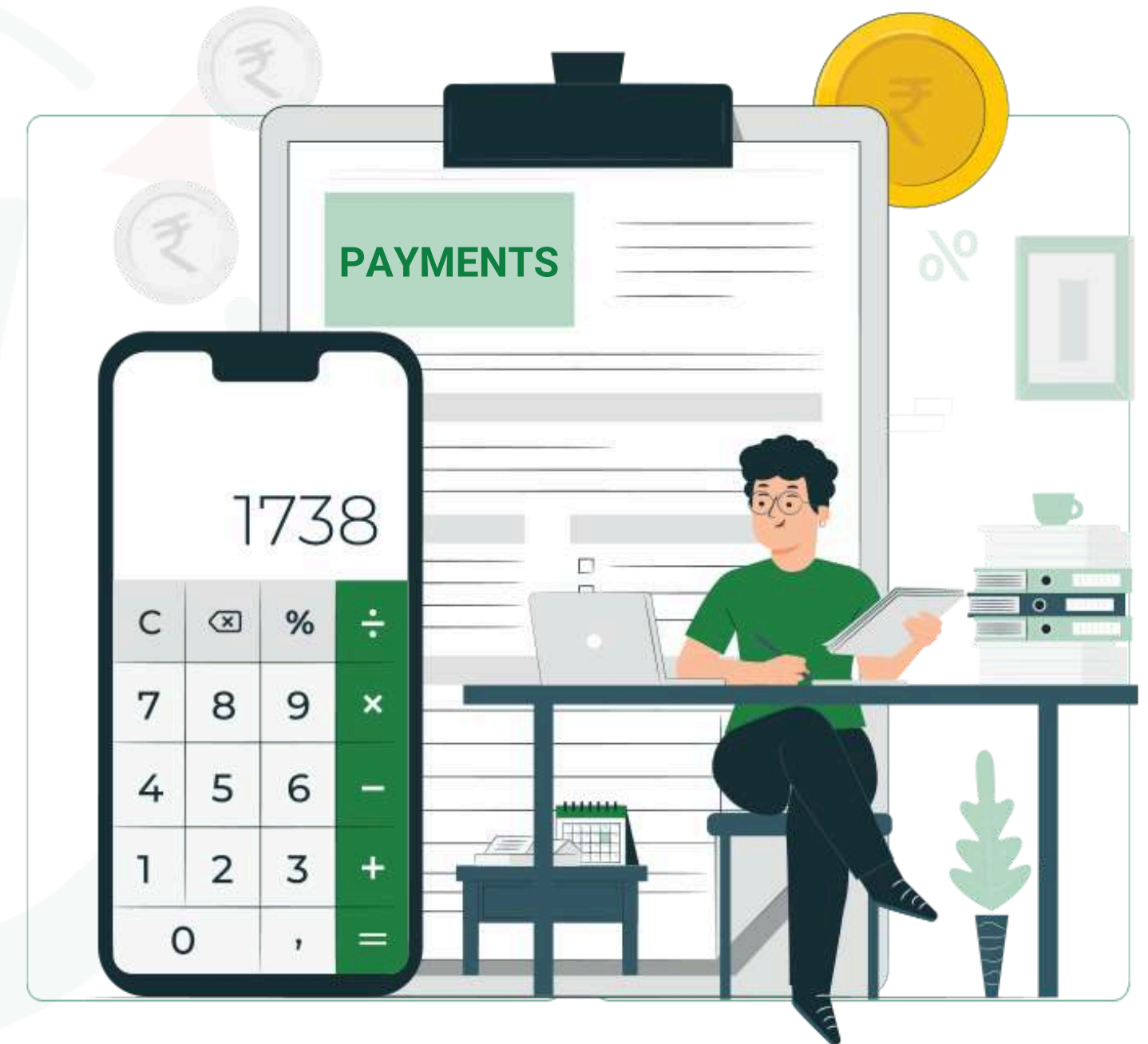
Inventory & Warehouse Management for Real Estate Materials

H-Office ERP's Inventory & Warehouse Management offers real estate developers a streamlined solution for managing construction materials and equipment across multiple project sites or warehouses. Track stock movement, set thresholds for critical materials, and get real-time alerts to ensure your projects are never delayed due to material shortages.

✓ Site/Branch-Wise Inventory Management for Multiple Project Locations

✓ Stock Location Tracking for On-Site and Off-Site Warehouses

✓ Stock Movement Tracking for Material Transfers Between Projects

✓ Item-Wise Stock Threshold Management with Real-Time Alerts

✓ Stock Tracking on Purchase Orders and Sales Orders for Precise Control

✓ Inter-Site Stock Transfer Utility for Seamless Movement of Materials

Core Elements of Inventory Management

This module covers inventory management at various levels, from essential raw materials to completed units ready for sale.

✓ **Raw Materials:** Tracks procurement, storage, usage, and reorder points.

✓ **Projects and Towers:** Manages inventory by project and tower for streamlined access.

✓ **Units:** Tracks finished units individually for sale, customization, and allocation.

Raw Material Inventory Management

The Raw Material section ensures construction materials are procured, stored, and utilized efficiently for each phase of construction.

✓ **Real-Time Inventory Levels:** View current stock, reorder points, and low-stock alerts.

✓ **Supplier and Purchase Tracking:** Manage vendors, purchase orders, and lead times.

✓ **Usage Tracking:** Monitor material consumption against project stages.

✓ **Batch and Lot Tracking:** Organize materials by batches or lots for quality control.

✓ **Inventory Forecasting:** Predict future material needs based on project progress.
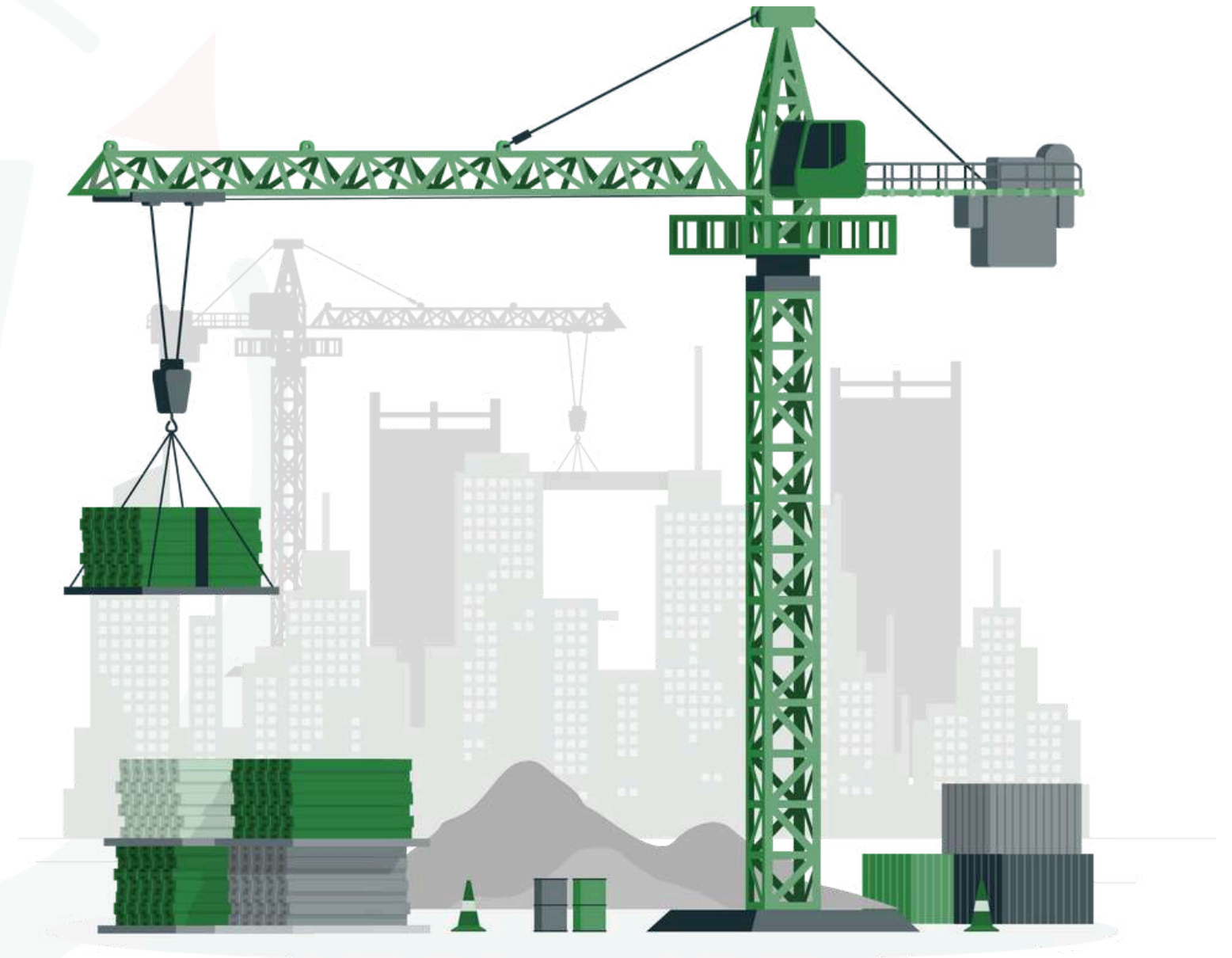
Finished Goods Inventory Management

The Finished Goods section manages completed construction units, including projects, towers, and individual units, enabling efficient sales and allocation.

✓ **Project-Level Tracking:** Overview of project completion and unit availability.

Tower-Level Details: Track inventory within each tower, including unit availability and phase status.

✓ **Unit-Level Management:** Monitor individual units for sales status, ownership, and customization.

✓ **Legal Document Storage:** Secure storage of legal and ownership documents.

Integration with Sales and Procurement

Inventory is fully integrated with sales and procurement, ensuring smooth transactions and real-time updates for all stock levels.

- ✓ **Sales Integration:** Real-time updates on finished unit availability for the sales team.
- ✓ **Procurement Automation:** Trigger purchase orders automatically when stock reaches reorder levels.
- ✓ **Allocation and Reservation:** Reserve units or materials directly, with automated updates.
- ✓ **Pricing and Discounts:** Configure pricing, apply discounts, and manage promotions for finished units.
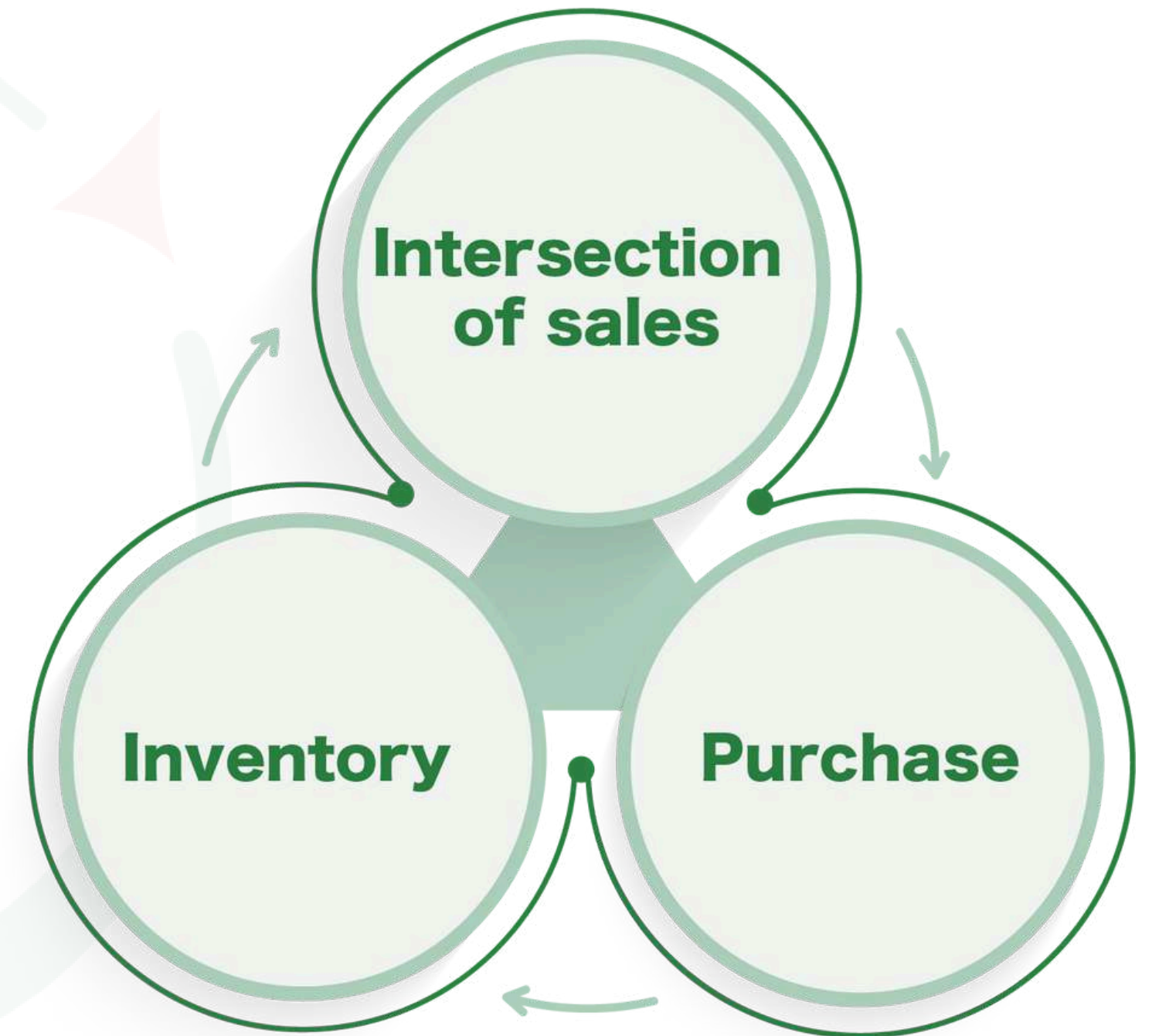
Financial Tracking for Inventory

Financial tracking provides insights into the costs and revenue associated with both raw materials and finished goods, aiding project profitability analysis.

✓ **Cost Overview:** Track expenses for raw materials, storage, and finished units.

✓ **Revenue Analysis:** Evaluate revenue generated from sold units in each project.

✓ **Project-Wide Financial Reports:** Overview of project costs vs. revenue.

Finance & Accounting Tailored for Real Estate Developers

H-Office ERP's Finance & Accounting module helps real estate developers efficiently manage financial transactions across multiple projects. Automate invoice generation for property sales, rentals, and material procurement. Manage payments, credit notes, and track all expenses with comprehensive financial reporting tools to keep your project finances on track.

✓ Multiple Invoice Type Management for Property Deals, Rentals, and Project Procurement

✓ Party & Material-Wise Purchase Preferences (Form, Invoice Type, Tax Group)

✓ Customizable Terms & Conditions, Cover Letters, and Annexures for Financial Agreements

✓ One-Click Invoice Copy for Recurring Project Payments

✓ Price List Management for Different Suppliers and Contractors

✓ Payment Receipts Can Only Be Generated or Authorized by Designated Personnel

Business Analytics for Real Estate

Leverage the power of data with H-Office ERP's Business Analytics. Whether you're analyzing property sales, customer preferences, or material usage, our comprehensive analytics tools empower real estate developers to make informed decisions, identify trends, and optimize their project strategies. With real-time data, developers can predict future market conditions, plan resource allocation, and improve overall profitability.

✔ Comprehensive Data Analysis for Sales, Inventory, and Profitability

✔ Customizable Dashboards for Project Management Insights

✔ Real-Time Metrics on Sales, Construction Progress, and Material Usage

✔ Sales Funnel Analysis for Property Transactions

✔ Material Usage and Stock Insights for Better Resource Planning

✔ Forecasting and Predictive Analytics for Market Trends

✔ Performance Benchmarking for Project Efficiency and Profitability

✔ Visual Data Representation for Easy Interpretation of Complex Data
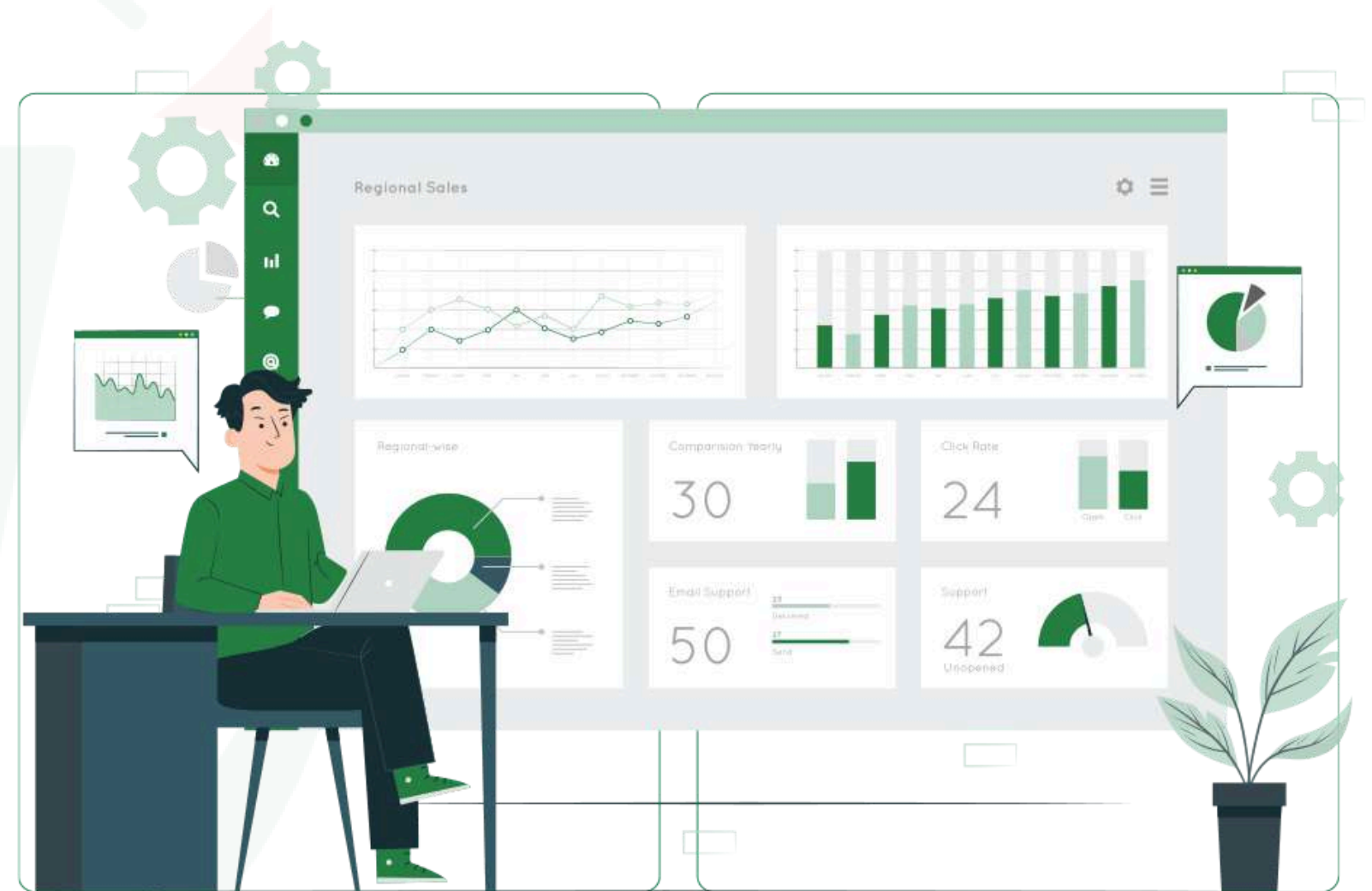
Multi-Property Management (Add-On)

Effortlessly manage diverse property portfolios, including residential, commercial, and mixed-use developments, under one unified system. Real estate developers can efficiently govern multiple projects, track sales, and monitor performance across locations, allowing for enhanced operational control and revenue optimization.

✓ Property-wise Staff Management

✓ Project-specific Product & Inventory Control

✓ Transaction & Reporting by Property

✓ Single Sign-On for Multi-Property Entities

✓ Cross-location Material Transfer

✓ Site-wise Client & Contractor Management

✓ Site Analytics & Performance Tracking

Purchase Indent / Material Requisition (Add-On)

The Purchase Indent Functionality in H-Office is tailored to streamline and optimize the procurement process, enhancing efficiency and accuracy specifically for real estate needs. This powerful module includes features for Material Requisition Management and Purchase Intent Management, enabling seamless coordination among departments, suppliers, and project teams. With H-Office, managing procurement activities for real estate projects becomes easier, more transparent, and highly effective.

✓ Material Requisition Management for Real Estate Project Needs

✓ Purchase Indent Management for Building Materials and Fixtures

✓ Approval Workflow for Indents Related to Construction and Development

✓ Import Utility for Bulk Indent Entries of Real Estate Resources

✓ Fulfillment Date Management for Project Milestones

✓ Terms and Conditions (T&C) Master for Supplier and Contractor Agreements

✓ Tracking Indents Against Project-Specific Sales Orders, Work Orders, and Tasks
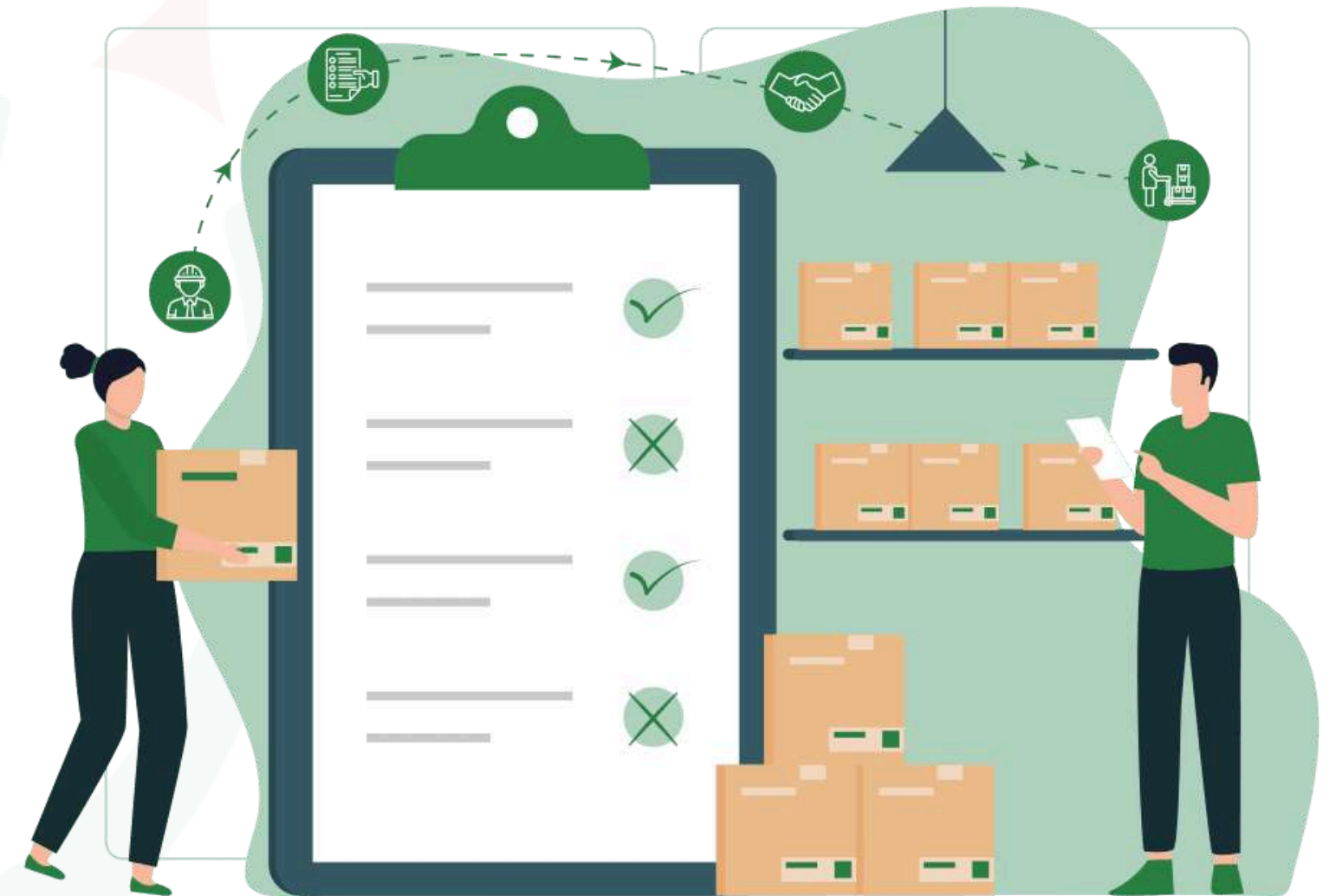
Vendor Quote Requester and Quote Comparison (Add-On)

H-Office's Vendor Quote Requester and Quote Comparison functions are designed to simplify vendor management in real estate projects, making it easy to request and compare quotes specific to construction materials, fixtures, and other project needs. This feature allows real estate teams to efficiently handle quotation requests and make accurate comparisons for items like building materials, flooring options, and furnishings. The automated comparison tool, integrated vendor directory, and real-time updates help in selecting vendors that meet project timelines, quality standards, and budget constraints.

✓ Request Quotes for Real Estate-Specific Materials and Services from Vendors

✓ Web Link for Vendors to Submit Real Estate Project Quotes to H-Office

✓ Automated Comparison of Vendor Quotes Based on Real Estate-Specific

✓ Criteria

✓ Vendor Performance Analysis for Real Estate Standards and Compliance

✓ Onboarding Process for New Vendors Specializing in Real Estate Supplies
Approval Workflow for Real Estate Vendor Partnerships

✓ Mapping Preferred Vendors for Building Materials, Fixtures, and Specialized Services

Material Quality Control for Real Estate Projects (Add-On)

In the realm of real estate and infrastructure, ensuring the quality of materials is non-negotiable for delivering top-notch projects. Introducing the groundbreaking "QC" (Quality Control) add-on from H-Office, tailored specifically for developers and infrastructure companies. This powerful tool enables businesses to uphold stringent quality standards by performing detailed inspections on incoming materials, ensuring compliance before stock updates. By incorporating quality control into your inventory processes, you can seamlessly accept or reject materials, reducing waste and maintaining the integrity of your projects. Unlock a new level of efficiency, transparency, and excellence with H-Office's "QC" add-on.

✓ Inspection Scheduling
✓ Quality Checks
✓ Compliance Tracking
✓ Precision Reporting
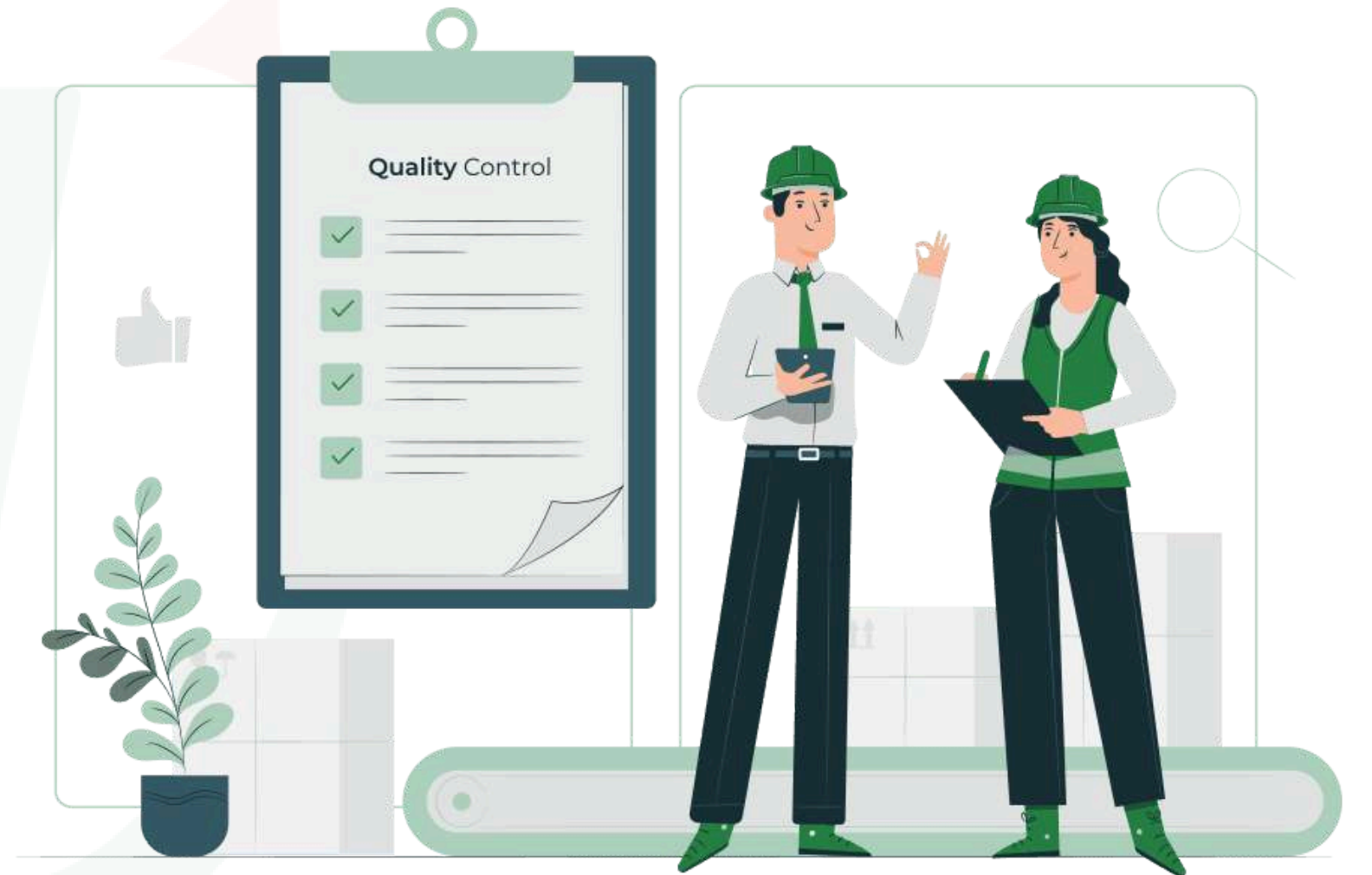
Expense Voucher Workflow (Add-On)

Streamline expense approvals and tracking across multiple real estate projects with automated workflows. Ensure that budgets are maintained and expenses are recorded in real time, minimizing errors and optimizing financial processes.

✓ Automated Voucher Creation & Approval

✓ Real-time Project Expense Tracking

✓ Reporting on Expense Settlements

Beneficiary

Disbursing Authority

Approving Authority

Work Order Management (Add-On)

Simplify the management of work orders for construction projects and repairs. This feature allows developers to schedule, track, and manage work orders, ensuring timely completion and accurate cost estimation.

✓ Work Order Creation for Construction & Maintenance

✓ Real-time Cost & Material Calculations

✓ Seamless Integration with Inventory & Billing

Financial & Payment Integrations (Add-On)

- **Tally** Sync financial data between H-Office and Tally, allowing smooth transactions such as expense vouchers, receipts, and credit notes for efficient financial reporting and accounting.

- **E-Invoice** Ensure regulatory compliance with Government of India's E-Invoice system integration. Automatically generate and submit B2B and B2C invoices directly from H-Office.

Tally
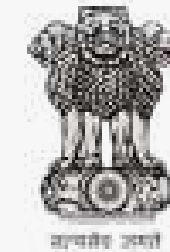
GOODS AND SERVICES TAX
e - Invoice System

E-Invoice

Payment Gateways (Add-On)

- **1Pay, CC Avenue, Razorpay:** Offer seamless and secure online payment processing for subscriptions, invoices, and product purchases directly within H-Office.

1Pay

CC Avenue

Razorpay

IoT & Attendance (Add-On)

eSSL & IoT Simplify employee attendance tracking with eSSL device integration. Leverage IoT capabilities for real-time data monitoring, automation, and enhanced operational efficiency.

eSSL

IoT

![H-Office — Your Trusted Cloud Office]

Customer & Partner Portal

In the fast-paced real estate market, managing investors, brokers, and sub-brokers requires an efficient system that streamlines registration, KYC processing, property deal management, and broker oversight. The H-Office CRM & ERP solution offers a comprehensive, mobile-friendly portal designed to meet the unique needs of real estate developers, brokers, and investors. With this solution, both master brokers and individual brokers can effortlessly manage their clients, investments, and business operations with full transparency and compliance.

Sign up

First Name

Last Name

E-mail

Password

Already a member? **Log in**
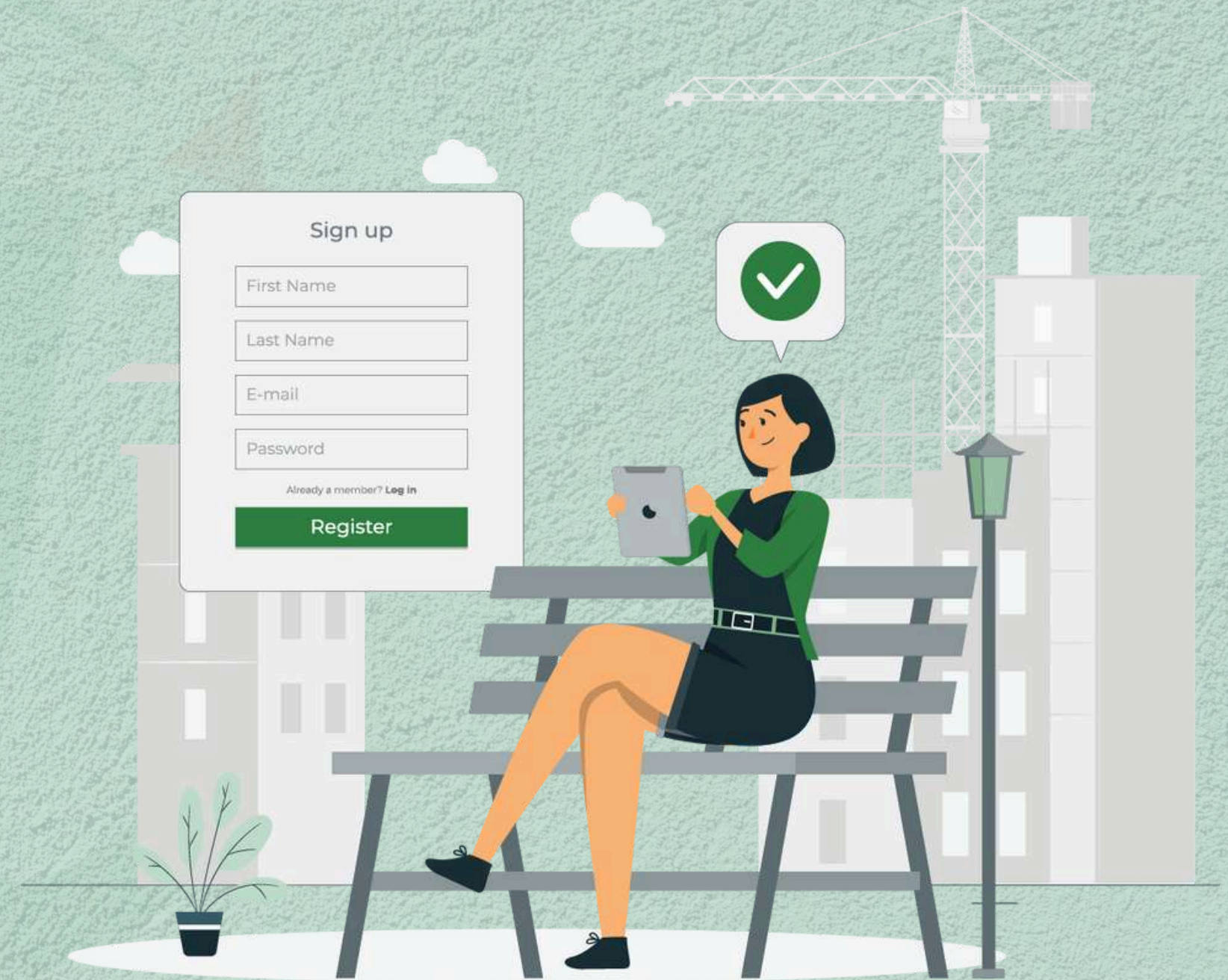
Register

Broker & Master Broker Registration Management

Our portal offers a centralized platform to manage broker networks, whether for individual brokers or master brokers overseeing multiple sub-brokers. Key features include:

✓ **Broker Registration by Master Broker:** Master brokers can easily onboard new brokers through the portal, streamlining the growth of their network and ensuring seamless oversight.

✓ **Master Broker Oversight:** Master brokers have complete access to track performance, monitor property registrations, and review investor details within their network.

✓ **Self-Registration for Brokers:** Individual brokers can register their own investors and manage property deals, making the investment process smooth and efficient.

Investor Registration & KYC Management

At the heart of the portal lies investor registration, designed for brokers and master brokers to easily onboard clients. Key features include:

✓ **Investor Registration by Brokers & Master Brokers:** Both levels can register investors quickly, enabling brokers to capture new opportunities without delay.

✓ **Automated KYC Process:** After registering, the system automates the KYC process to ensure compliance with legal standards, reducing bottlenecks.

✓ **Backend KYC Verification:** The parent real estate company conducts KYC checks to ensure that all investor data is validated and secure before any transactions are processed.

Earnings & Commission Processing

Our portal provides transparency in earnings and commission management for both brokers and master brokers.

✓ **Earnings Dashboard:** Brokers and master brokers have access to detailed earnings reports, allowing them to track processed and unprocessed commissions in real time.

✓ **Master Broker Oversight:** Master brokers can monitor the financial performance of their entire broker network, gaining insights into commission earnings and revenue streams.

✓ **Backend Commission Management:** The parent company manages commission payouts, ensuring accuracy and transparency in the payment process.

Real-Time Status Updates & Notifications

Our platform keeps all users informed with real-time notifications and updates:

✓ **Instant Notifications:** Brokers receive alerts for investor registrations, KYC approvals, and property deal statuses, allowing them to stay updated on critical business developments.

✓ **Investor Status Monitoring:** Brokers can track investor progress through every step of the registration and deal process, ensuring smooth transactions.

Mobile-Friendly User Interface

Designed with a mobile-first approach, the portal is fully optimized for use on any device. Whether accessed on a smartphone, tablet, or desktop, brokers, investors, and master brokers can manage their operations efficiently from anywhere.

✓ **Comprehensive Reporting & Analytics:** Unlock key insights into your real estate operations with powerful analytics tools

✓ **Broker Performance Analytics:** Master brokers can generate detailed reports on broker performance within their network, helping drive better decision-making.

✓ **Investor Activity Reports:** Brokers can access reports detailing investor registrations, KYC statuses, and deal histories to stay informed on their client base.

✓ **Sales Funnel Reports:** Get detailed insights into the sales funnel, conversion rates, and overall sales performance to refine strategies and boost revenue.

✓ **Earnings Reports:** Detailed commission and earnings reports give brokers and master brokers full visibility into their financial progress, helping ensure smooth business operations.

H-Office®
**Your Trusted Cloud Office**

Documentation

H-Office streamlines the documentation process for real estate developers by offering a suite of tools designed to automate and simplify key tasks. From generating demand letters and creating customized agreements to ensuring GST compliance, H-Office ensures that all necessary legal and financial documentation is accurate and easily accessible. The system also allows for efficient management of customer ledgers and offers personalized document printing, providing developers with the flexibility to tailor documents to client needs while maintaining consistency and compliance across all transactions.

Demand Letter Generation

Efficient Demand Letter Creation

Easily create demand letters for your clients with our streamlined demand letter generation tool. It tracks sent letters, helping you stay on top of follow-ups and payment collections effortlessly.
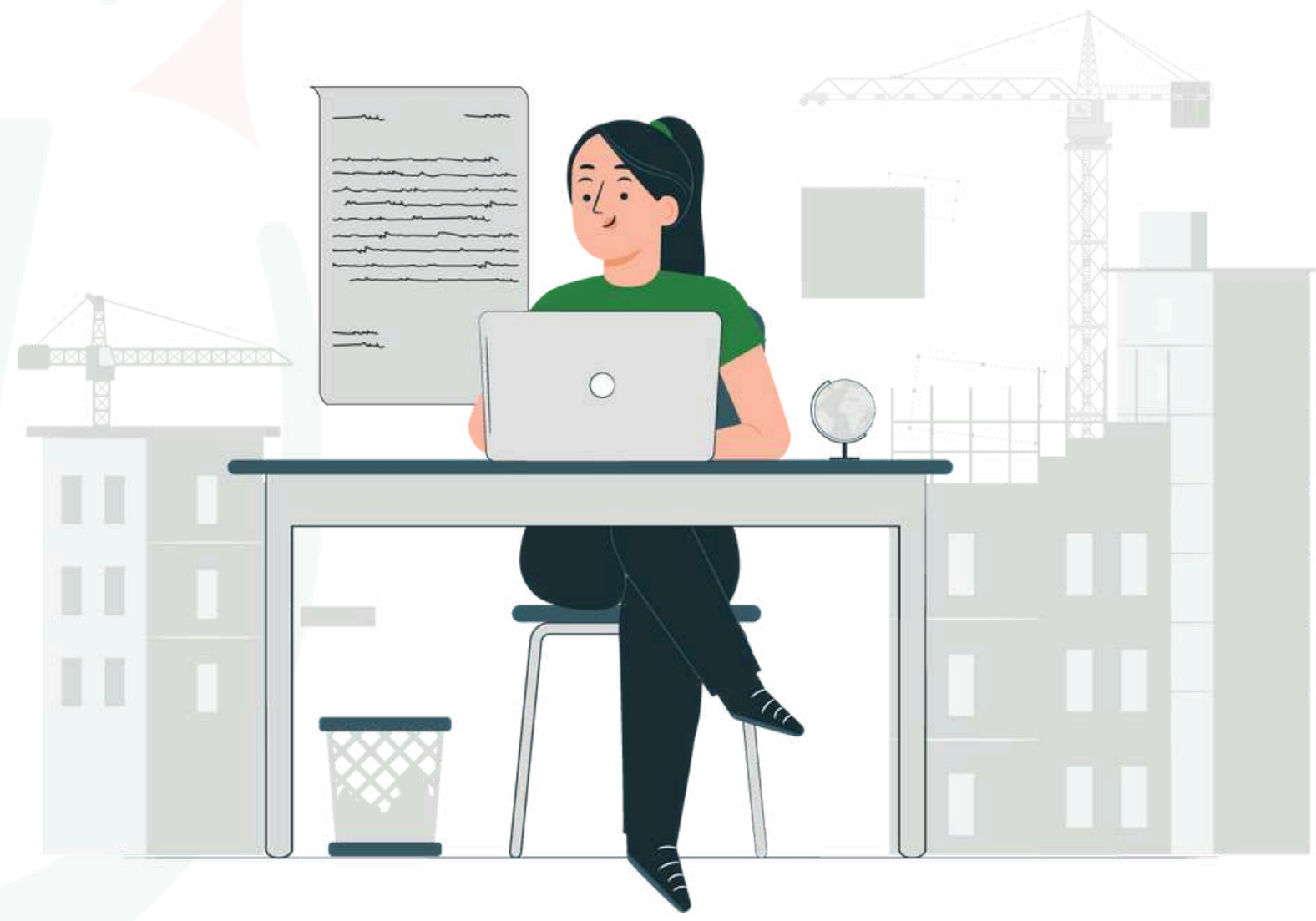
Agreement Creation

Automated Agreement Creation

H-Office automates the agreement creation process, helping you generate and manage agreements at every stage of the sales cycle, saving you time and minimizing manual tasks.

GST Compliance

100% GST & Real Estate Tax Compliance

H-Office includes a built-in tax calculator that simplifies GST and other real estate tax calculations for every sale. Ensure complete accuracy and peace of mind for both you and your clients with automated tax compliance.

Customer Ledgers

Instant Access to Customer Ledgers

Monitor payment statuses in real-time with one-click access to customer ledgers. Easily follow up with pending payments and streamline account settlements without wasting time.

Personalized Document Printing

Print Custom Documents, Agreements, and More

Generate personalized documents such as agreements, allotment letters, and surveys directly from the system. Send them instantly to clients, ensuring efficient communication and maintaining top-notch service quality.

Service & Maintenance

The Service & Maintenance Module in H-Office CRM offers a comprehensive suite of features and functionalities designed to streamline maintenance operations for real estate developers and property managers. It enables efficient management of service requests, task allocation, and vendor relationships, ensuring timely issue resolution and high-quality service delivery. The module automates service scheduling, tracks maintenance histories, and provides real-time notifications for seamless communication. Additionally, it allows for invoice and payment management, cost tracking, and budgeting, empowering property managers to stay on top of expenses and ensure smooth workflows while maintaining tenant satisfaction and operational efficiency.

Key Features

✓ **Maintenance Request Management :** Centralized platform for tenants or property managers to submit and track service requests.
- Categorize and prioritize maintenance issues (e.g., plumbing, electrical, HVAC).

✓ **Automated Service Scheduling**
- Automatically assign maintenance tasks to relevant teams or vendors.
- Schedule recurring maintenance tasks (e.g., annual inspections, system checks).

✓ **Vendor Management**
- Maintain a directory of preferred and certified service vendors.

✓ **Service History Tracking**
- Keep a detailed history of all maintenance activities per property or tenant.
- Track service requests, resolution times, and costs for future reference.

Functionalities for Property Managers

✓ **Task Allocation & Workflow Management**
- Assign tasks to internal teams or external service providers.
- Track task completion and ensure timely follow-up.

✓ **Invoice & Payment Management**
- Manage invoices from service vendors directly within the module.
- Track payment schedules and outstanding invoices for maintenance services.

✓ **Service Request Escalation**
- Escalate unresolved issues to higher levels for quicker resolution.
- Streamline decision-making for urgent maintenance needs.

✓ **Cost Tracking & Budgeting**
- Monitor maintenance expenses and track budgets for each property or project.
- Generate financial reports to evaluate service costs and efficiency.

Service Contract Management

Efficiently manage contracts related to property sales, leases, and service agreements. Track the lifecycle of contracts from creation to renewal, ensuring compliance with legal and operational requirements in real estate development.

✓ Customizable Contract Creation (Sales, Lease, Service)

✓ Contract Deadline Alerts & Calendar

✓ Terms & Conditions Mapping by Contract Type

✓ Track Service Requests Linked to Specific Properties

✓ Follow-up Management for Renewals

Inventory Handling with Support Management (Add-On)

Track and manage repair and replacement inventory for ongoing maintenance projects. Whether it's post-sale repairs or warranty management, this module ensures efficient handling of service-related inventory.

✓ Real-time Repair & Replacement Product Tracking

✓ Inventory Integration with Support Tickets

✓ Comprehensive Stock Reporting for Maintenance Needs
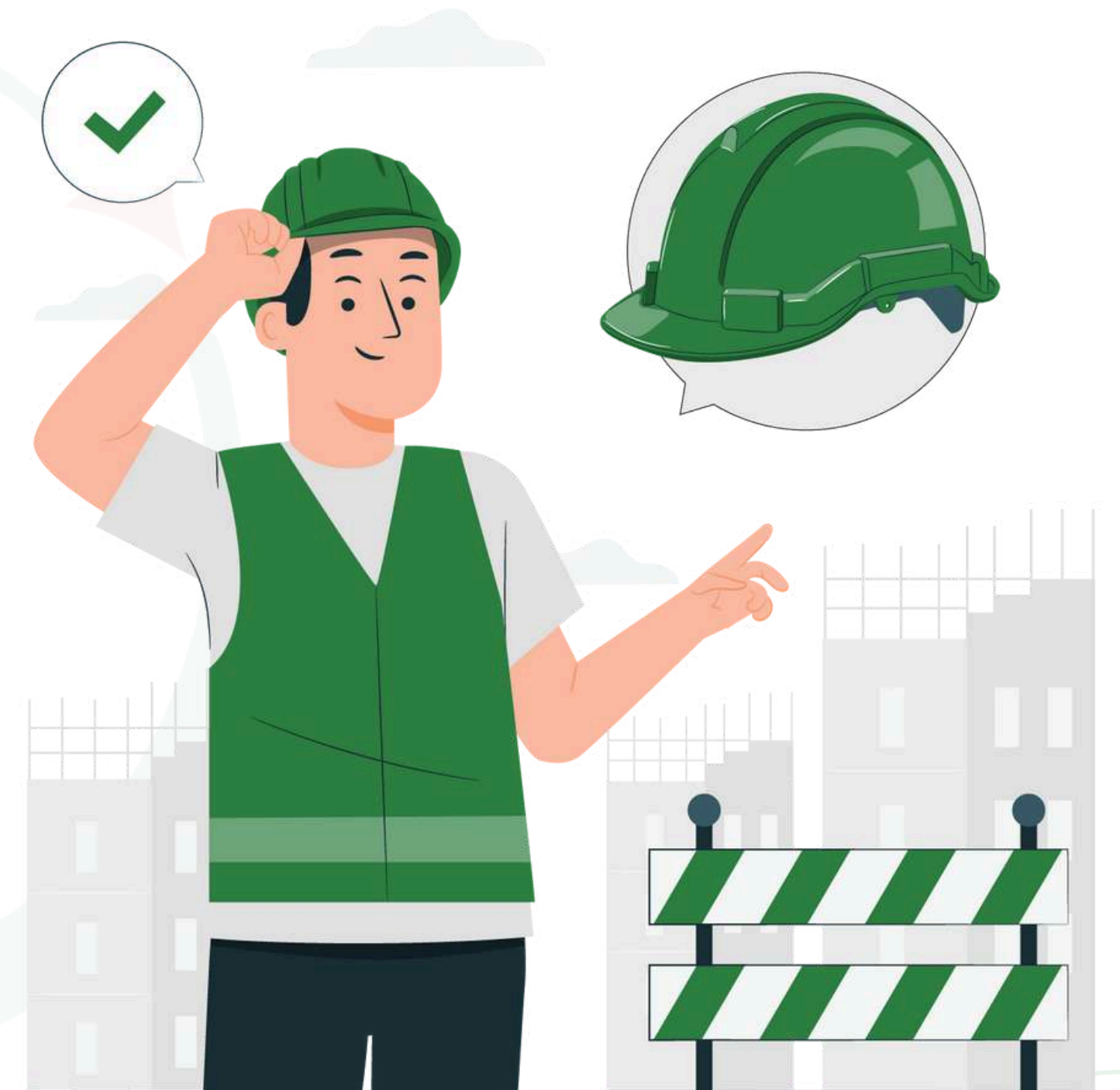
Client Support Portal (Add-On)

Provide a dedicated portal for clients to submit and track requests or issues related to property services. This module empowers real estate developers to enhance customer service, from post-sales support to repair requests, with seamless ticket tracking.

✓ Online Ticket Generation for Buyers & Tenants

✓ Real-time Issue Tracking

✓ Integrated Communication with Clients

✓ Document & Photo Attachments for Site Inspections

✓ Access Control for Sensitive Requests

H-Office Property Showcase Website

The property showcase website combines attractive features with seamless lead management. It offers detailed property listings, high-resolution galleries, and amenities displays to engage buyers. CRM integration automates lead creation from inquiries, capturing buyer details and notifying the sales team instantly, making it a powerful tool for property marketing and sales.

www.hofficecrm.com
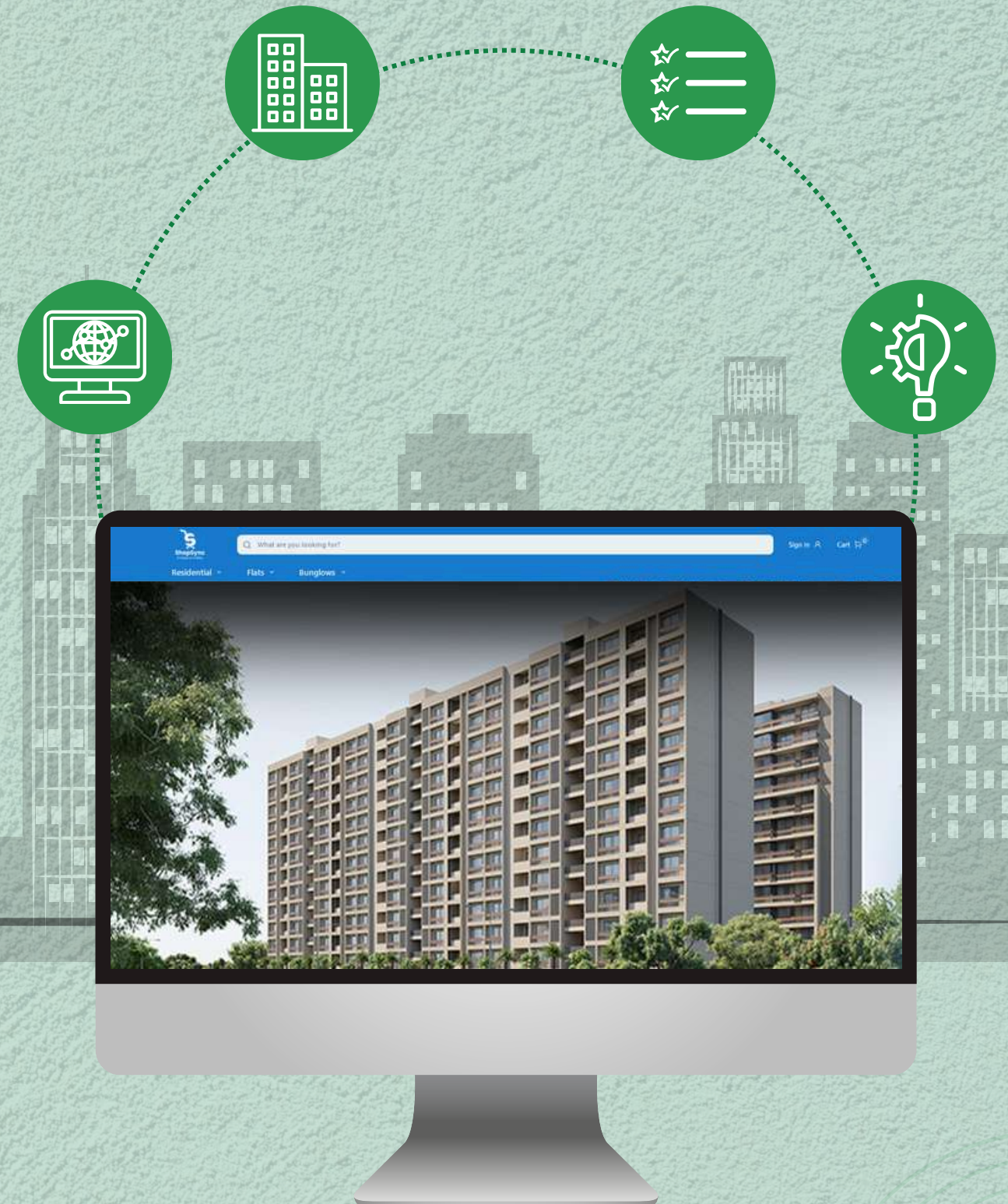
Key Features of the Property Showcase Website

This module includes powerful features to showcase properties attractively and capture leads effectively.

✓ **Project and Property Listings:** Showcase all active projects, each with detailed descriptions, images, and unit availability.

✓ **Amenities Display:** Highlight amenities for each project, such as gym, pool, and parking facilities.

✓ **High-Resolution Photo Galleries:** Engage potential buyers with high-quality visuals.
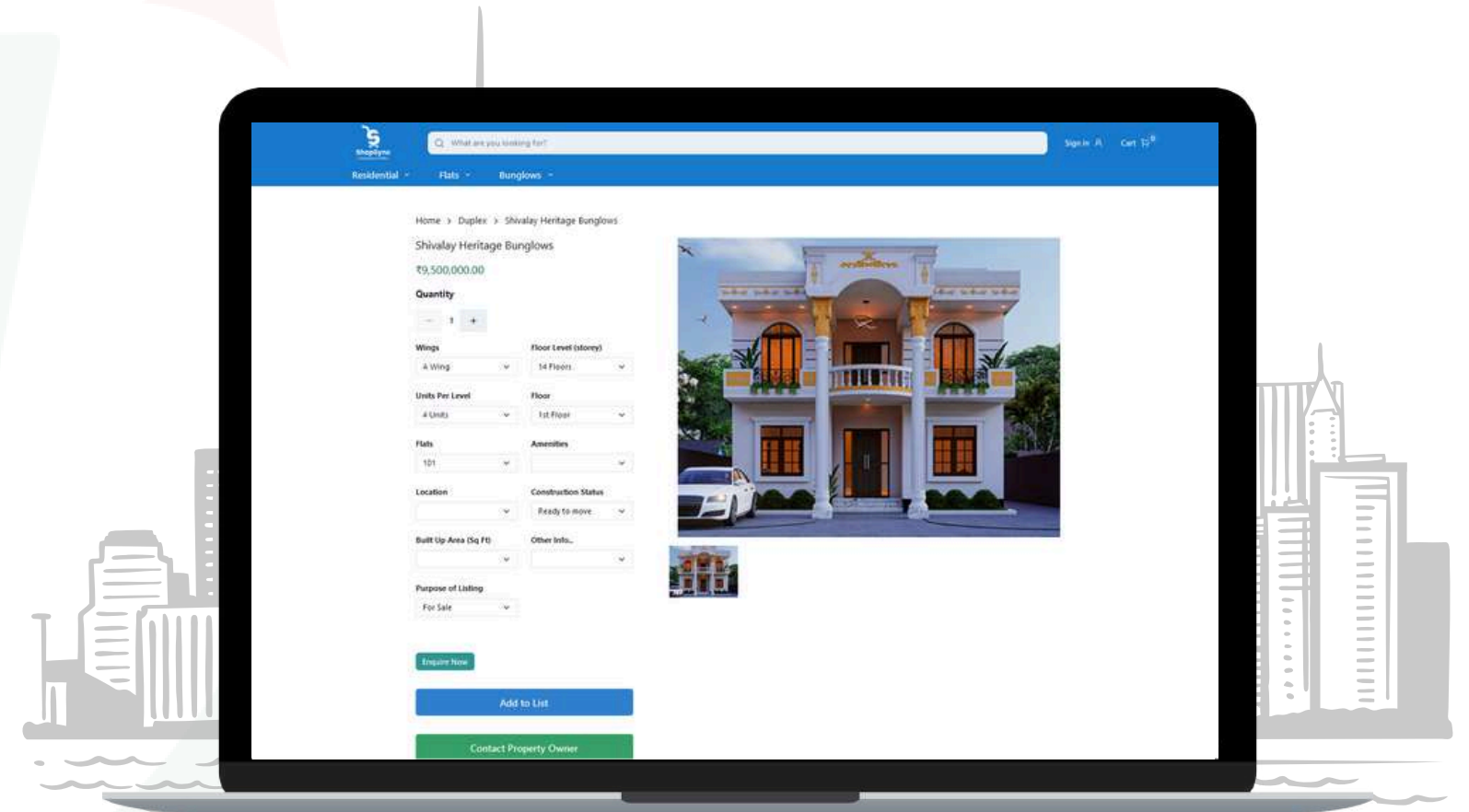
CRM Integration for Automated Lead Capture

The website connects directly to CRM, creating leads automatically when buyers inquire about properties from website.

✓ **Automatic Lead Creation:** Inquiries from the website instantly create leads in the CRM.

✓ **Detailed Lead Data:** Captures contact details, property interests, and preferences.

✓ **Instant Notifications:** Sales team members receive alerts for timely follow-up.
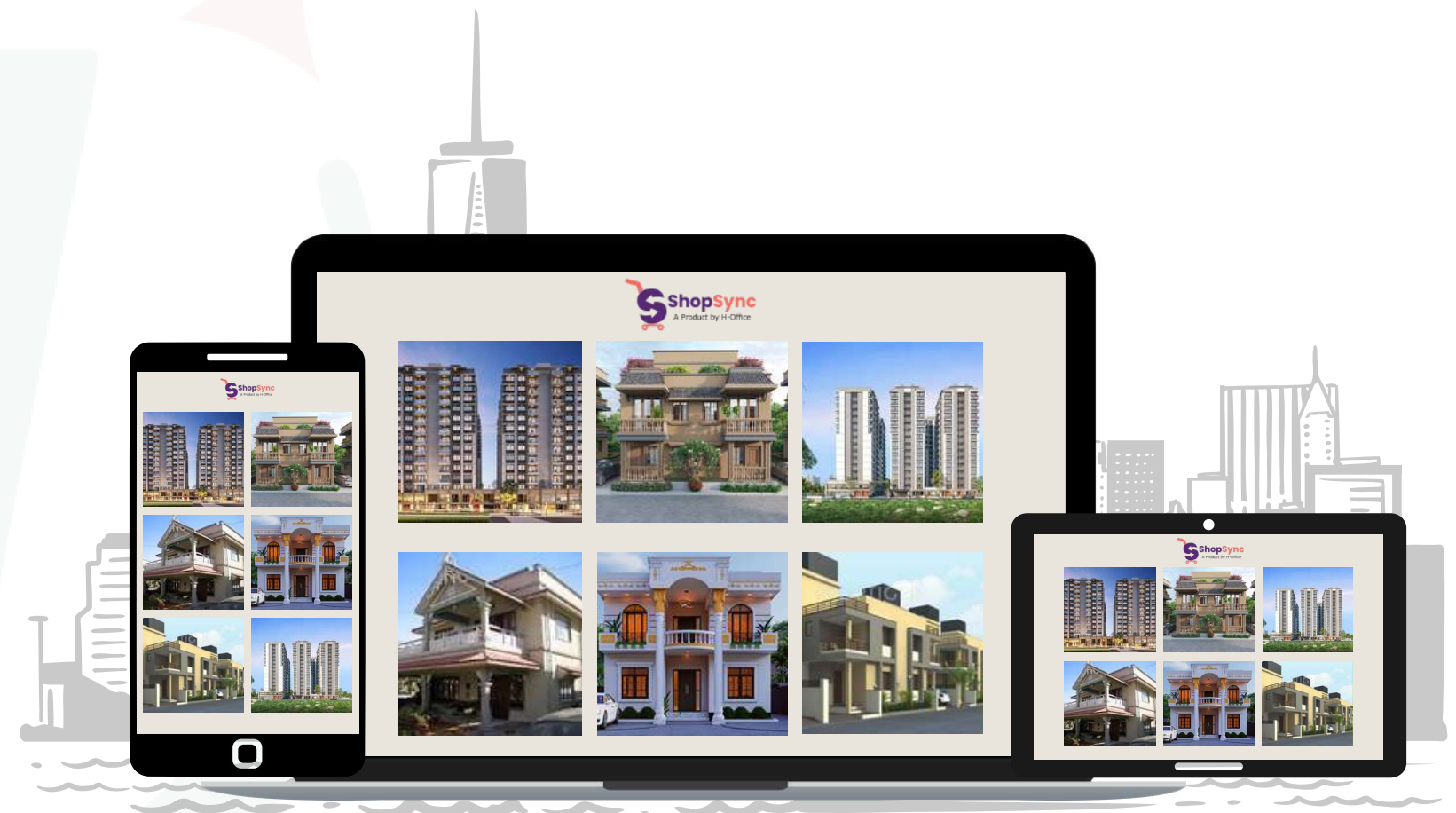
Location Services (Add-On)

Google Maps Enhance location tracking, route optimization, and geographic data visualization with Google Maps integration, streamlining all location-based tasks within the system.

Google Maps

FAQ

Find quick answers to common queries about the Real Estate CRM/ERP in H-Office. Learn how it simplifies property management, automates sales workflows, and enhances client interactions. Discover its features, benefits, and how it can be customized to meet your business needs.

What is H-Office Real Estate CRM?

H-Office Real Estate CRM is a powerful software solution that enables all sales and marketing activities for real estate developers, agents, and brokers via a digital platform. From managing incoming leads and contacts to automating the entire sales funnel, H-Office CRM handles end-to-end processes for real estate businesses. Unlike generic CRMs, H-Office is specifically tailored to address the challenges faced by the real estate industry, making it the ideal solution for businesses in this sector.

Why Choose H-Office for Real Estate?

H-Office is a leading CRM software built exclusively for market professionals. It automates the entire sales and marketing cycle, helping your team close more bookings with minimal effort. Whether you're managing leads, customer communications, or post-sales operations, H-Office makes every process smoother and more efficient.

How Does H-Office Real Estate CRM Work?

H-Office Real Estate CRM supports every stage of your business process—from pre-sales, sales, to post-sales. The platform adapts to your evolving business needs, enabling you to effectively manage people, processes, and technology. With all features, analytics, and insights centralized in one place, H-Office allows developers and brokers to focus on what matters most: closing deals and driving growth.

What are the Benefits of H-Office Real Estate CRM?

H-Office Real Estate CRM streamlines everything from lead management, sales, post-sales support, to advanced CRM functionalities. The system evolves alongside your business, offering tools that help you efficiently manage your operations. With centralized data, automated processes, and actionable insights, H-Office empowers your team to focus on selling and scaling, rather than on managing daily tasks.

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Get in touch with us today!

📞 **+91 93270 58088**

✉️ **hello@hofficecrm.com**

🌐 **www.hofficecrm.com**

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