4. Client

Client Module — View and manage client profiles, track unit sales from show to delivery, handle client requests, and access full payment and interaction history.

Client Details

Overview

Clicking on a client's name opens the **Client Details** page — a full view of all information, history, and actions related to that client.

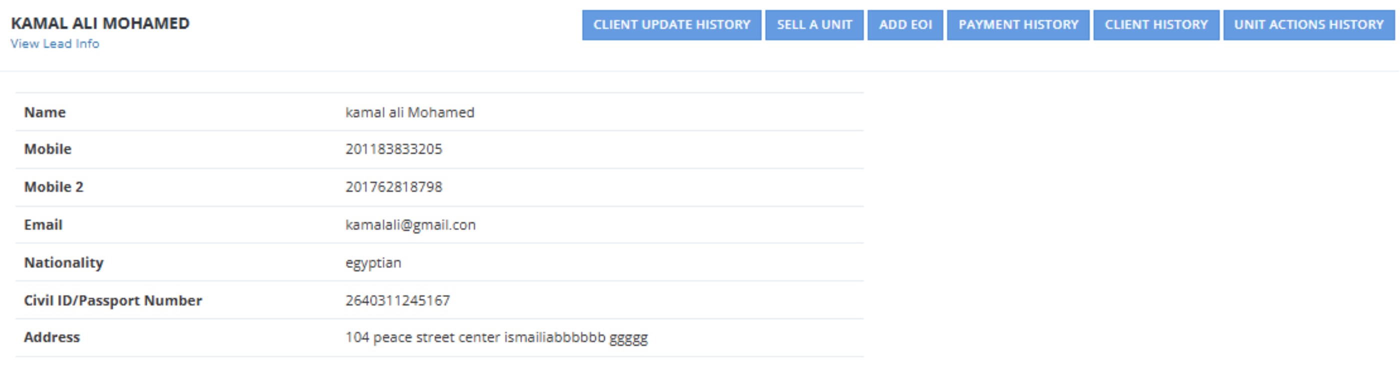
Client Information Fields

Field	Description
Client ID	Unique identifier assigned to the client.
Name (Arabic)	Client's name in Arabic.
Name (English)	Client's name in English.
Mobile	Contact number.
Email	Email address.
Broker / Broker Agent	If referred by a broker or agent, their details appear here.
Sales Team	The salespeople responsible for this client, with their contact info.
Notes	Any notes recorded about the client.
Files / Private Files	Upload and view documents related to the client.

Available Actions from the Client Profile

Action	Description
Client Update History	View a log of all changes made to the client's profile.
Sell Unit	Start the unit sale process for this client.

Action	Description
Add EOI	Register an Expression of Interest for a unit.
Payment History	View all payment transactions linked to this client.
Client History	Review the full interaction history with this client.
Unit Actions History	Track all updates and interactions related to units the client is interested in.
Create Client Requests	Submit a new request on behalf of the client.
View Client Tickets	See all support tickets linked to this client.
View Client EOIs	See all Expressions of Interest submitted by or for this client.



Client Tickets

Scrolling down, you'll find a list of all **support tickets** related to this client, showing:

- Ticket Number
- Type
- Name
- Phone
- Communication Method

Client EOIs (Expression of Interest)

Also visible on this page — all EOIs submitted for this client, showing:

- EOI Serial
- Project

- Creator
- Salesperson
- Broker
- EOI Status

CLIENT TICKETS

Ticket Numbers	Type	Name	Phone	Communication Method	Note	Date	Salesman	Leads ID	Project	Source	Unit Type	Related Item	Done Date	User	Recall Project	State

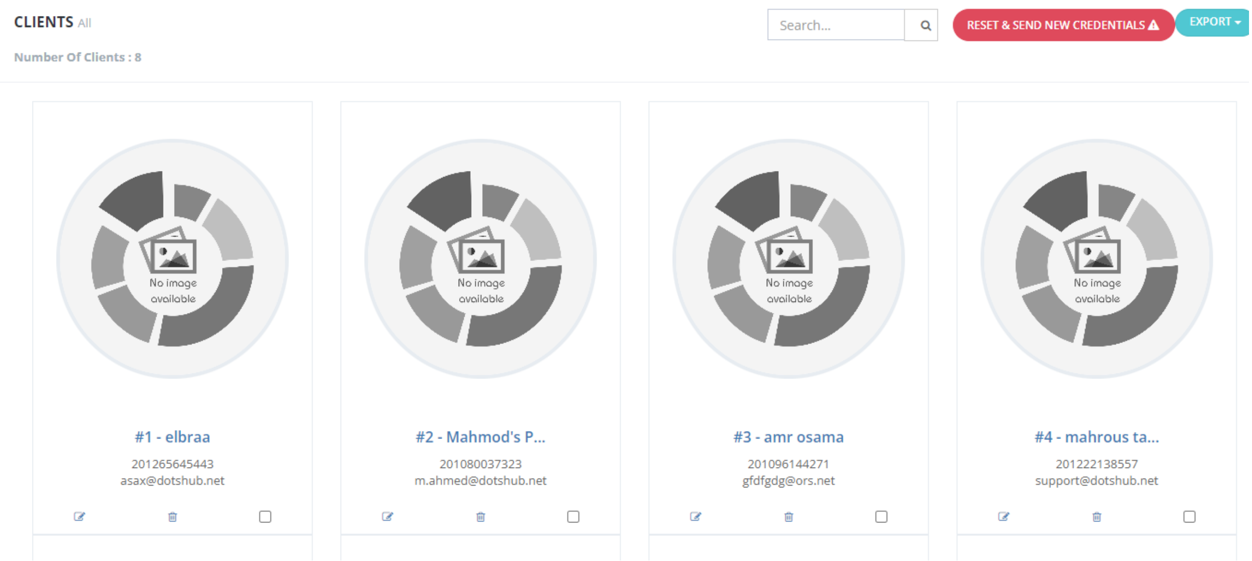
CLIENT EOIS

EOI Serial	Project	Creator	Salesmen	Broker	Creation Date	Amount	Status Update Date	EOI Status	EOI Note	Actions

Client

Overview

The **Clients** module allows users to view, manage, and update client information. Each client is displayed as a card with their key details. The total number of clients is shown at the top of the page.



Client Information

Each client profile includes:

- **Client ID** — A unique ID assigned to each client.
- **Name** (Arabic & English)
- **Mobile** — Contact number.
- **Email** — Email address.
- **Broker / Broker Agent** — If the client was referred by a broker or agent.
- **Sales Team** — The salespeople responsible for this client.
- **Notes** — Any notes recorded about the client.
- **Files & Private Files** — Documents related to the client.

Available Actions

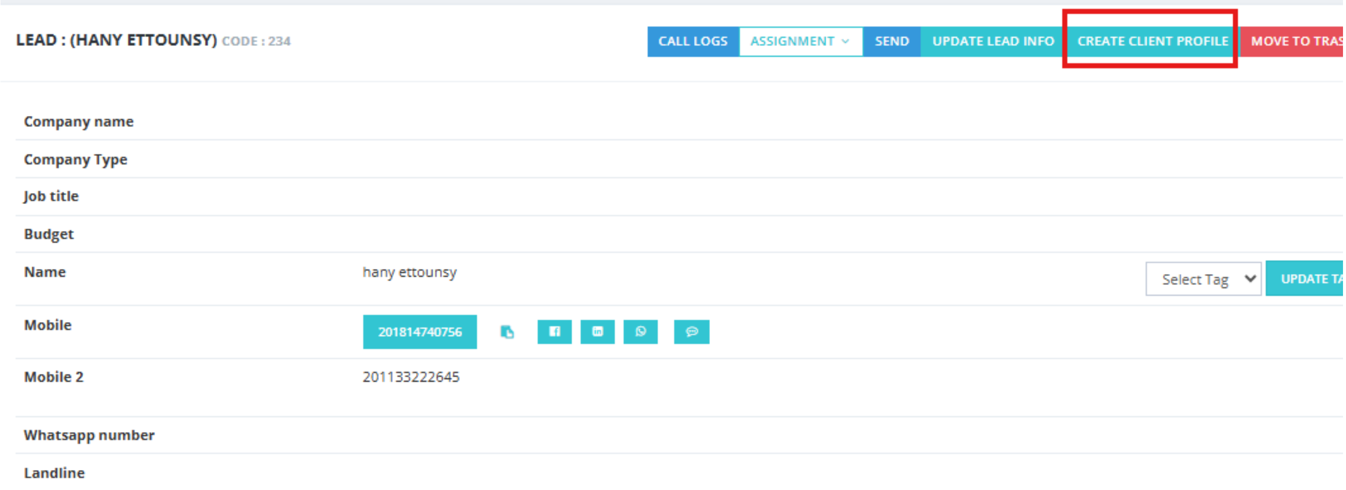
- **Search Clients** — Find a client by name or other details.
- **Export Clients** — Export the client list in CSV or Excel format.
- **Reset & Send New Credentials** — Reset a client's login credentials and send the updated info to their email.
- **Edit Client** — Modify the client's details.
- **Delete Client** — Remove the client from the system.

When to Create a Client Profile

A client profile is created when a lead reaches the **Done Deal** state and is converted into a client.

How to Create the Profile

1. Go to the **Leads** tab.
2. Open the lead that is in **Done Deal** status.
3. Click **Convert to Client**.
4. Fill in the additional required fields for the client profile.
5. Click **Save** — the lead is converted into a client profile and added to the Clients module with all related information.



Adding Custom Fields to the Client Form

You can add custom fields to the Convert to Client screen to capture additional information specific to your business.

Steps to Add Custom Fields

1. Go to **Setup → Fields Setup**.
2. Click **Add New**.
3. Configure the field:
   - **Client Form** — Set to **True** to make this field appear on the Convert to Client form.
   - **Field Name** — Enter a name (e.g., Passport Number, Customer Preferences).
   - **Data Type** — Select the appropriate type (text, number, date, etc.).
   - **Set as Unique** — Enable to prevent duplicate entries for that value (e.g., National ID, Passport Number).
4. **Save** — the field will now appear on the client form for all new conversions.

Units Management

Overview

From the **Client Details** page, you can manage all unit interactions for a client — from showing them a unit all the way through to delivery.

Unit Sale Workflow

Units move through the following stages:

Stage	Description
Show	Unit has been presented to the client.
Hold	Unit is reserved temporarily while waiting for the client's confirmation.
Reservation	Client's interest is confirmed — reservation is formalized.
Confirm Reservation	Reservation is finalized and confirmed.
Down Payment	Client makes a down payment.
Confirm Down Payment	Down payment is verified.
Contract	Sales contract is prepared and issued.
Delivery	Unit is delivered to the client — transaction is complete.

How to Show a Unit to a Client

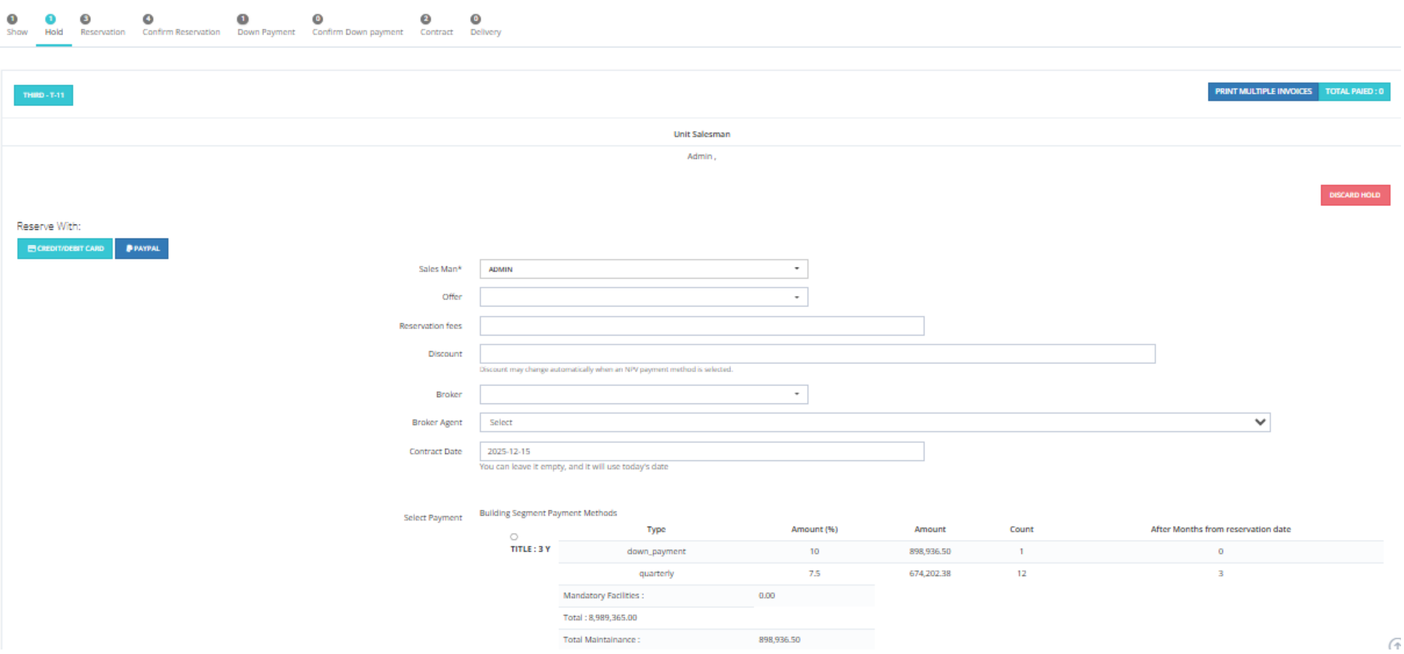
1. Go to the client's detail page → **Units** tab.
2. Select the unit you want to show.
3. Click the **Show** button.
4. Select the client from the dropdown.
    - If the client doesn't have a profile yet, click **Quick Hold** to create a client profile on the spot, fill in their details, then proceed.

5. Confirm to move the unit to the **Hold** tab.

Hold & Reservation — Required Fields

When moving a unit to Hold or Reservation, fill in the following:

Field	Description
Salesman	Choose the salesman responsible for this client.
Offer	Select an applicable offer, if any.
Reservation Fees	Enter the reservation fee amount. Enter `0` if no fee applies.
Discount	Specify the discount percentage, if applicable.
Broker	Select the associated broker, if any.
Broker Agent	Select the broker's agent, if applicable.
Contract Date	Enter the contract date.
Payment Method	Choose the appropriate payment method.



Delivery Updates

The **Delivery** section tracks the progress of unit delivery for each client. Use it to monitor pending steps and ensure the client receives their unit on time.

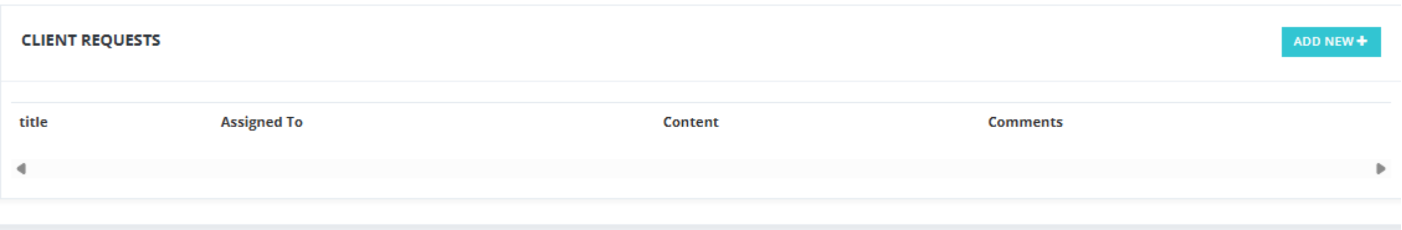
Client Requests

Overview

The **Client Requests** module is used to create and manage requests submitted on behalf of clients. This covers delivery inquiries, financial requests, service issues, and more. Requests are routed to the relevant department for handling.

Request Information

All requests are displayed in a table with the following columns:



Column	Description
Client	The client associated with the request.
Title	A brief summary of the request.
Content	A short description of the request details.
Department	The department assigned to handle the request.
Assigned User	The team member responsible for managing the request.

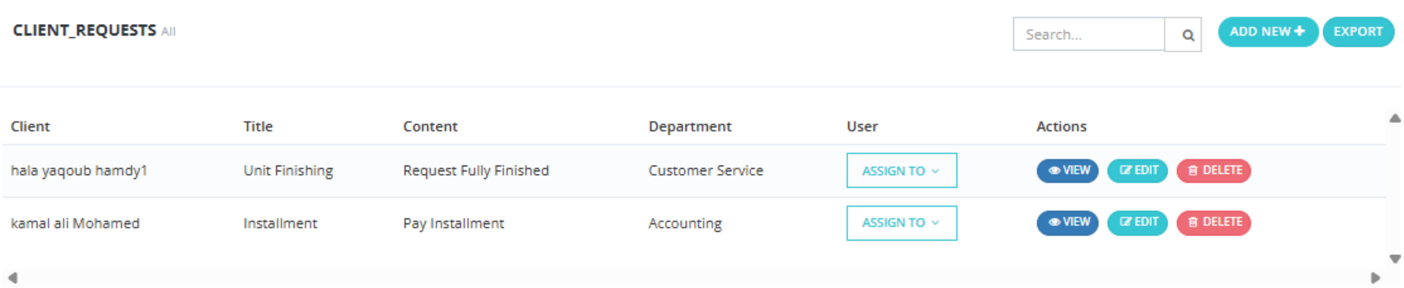
How to Create a New Request

1. Click **Add New**.
2. Fill in the required fields:

Field	Required	Description

Client	￼	Select the client associated with this request.
Title	￼	A brief, descriptive title for the request.
Content	￼	Full description of the client's request or issue.
Department	￼	Choose the department that should handle it.
User	￼	Assign a team member to manage the request.
Files	Optional	Upload supporting documents.
Images	Optional	Upload any related images.

3. Click **Create** to submit the request.



Available Actions

- **Search Requests** — Find requests by client name, title, or keyword.
- **Edit Request** — Modify the request's details or status.
- **Delete Request** — Remove a request if no longer relevant.
- **Reassign Request** — Move the request to a different department or user.
- **Track Request Progress** — Monitor the status of each request from the table.