

Create Payment Plans

Overview

Payment plans define how a unit's price is split into installments. They can be created at multiple levels — Global, Project, Building Segment, and Unit — and are applied during the Hold/Reservation step when the salesman selects a payment plan for the client.

Payment Plan Hierarchy

Payment plans can exist at 4 levels. The system always shows **all available plans** from all levels, and the salesman selects the one that applies. If a plan is created at the building segment level, it only appears for units in that segment. If at the unit level, only for that specific unit.

Global Payment Methods (Setup → Payment Methods)

↓ can be used by

Project level plans

↓ can be used by

Building Segment level plans

↓ can be used by

Unit level plans

How to Create a Global Payment Plan

Go to **Setup → Payment Methods → Add:**

Field	Required	Description
Title	<input type="checkbox"/>	Plan name (e.g., "3Y", "5Y", "7Y").

Field	Required	Description
Minimum Down Payment Percentage %	Optional	Minimum down payment percentage allowed.
Add Phase	—	Add installment phases to the plan.

Adding Phases

Each phase has:

Field	Description
Payment Type	Type of installment (Down Payment, Quarterly, Monthly, Biannual, Delivery, Cash, etc.).
Amount	Percentage of the unit price for this phase.
Count	Number of installments of this type.
After Months	How many months after the contract date the first installment of this phase starts.


“ ☐ The **calculator icon** (☐) on the last phase auto-fills the remaining percentage to reach 100% — so you don't have to calculate it manually.

“ ☐ The total of all phases must equal or exceed 100%. It can exceed 100% but not be below.

TOTAL shows the running percentage total as you add phases. Click **Add Phase** to add more rows. Click **Save** when done.

How to Create a Plan at Project / Building Segment / Unit Level

Same fields as the Global plan, but at the **Building Segment** and **Unit** level you can create a payment plan using a fixed **Amount** instead of a percentage — useful when you know the exact monetary value rather than a percentage of the unit price.



“ If creating a plan by Amount at the Building Segment or Unit level, the total amount across all phases must equal or exceed the unit price.

Go to the relevant level (Project edit, Building Segment edit, or Unit edit) and use the **Select Payment** section to either:

- **Select from existing global plans** — choose one or more to make available for this project/segment/unit.

Select Payment	<input type="checkbox"/>																															
TITLE: MAINTAINANCE		<table><thead><tr><th>Type</th><th>Amount (%)</th><th>Count</th><th>After Months from reservation date</th></tr></thead><tbody><tr><td>maintenance</td><td>100</td><td>1</td><td>24</td></tr><tr><td colspan="4">Total : 8,989,365.00</td></tr></tbody></table>	Type	Amount (%)	Count	After Months from reservation date	maintenance	100	1	24	Total : 8,989,365.00																					
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- **Add a new plan** — create a plan specific to this level.

Maintenance

Maintenance works the same way as payment plans — same fields, same hierarchy levels (Global, Project, Building Segment, Unit).

Maintenance Fields

Field	Description
Name	Maintenance name (e.g., Maintenance, Annual Maintenance).
Amount	Can be a fixed amount or a percentage (%) — if %, it's calculated from the unit price .
Payment Method	Select which Global Payment Method to use for collecting this maintenance. The dropdown shows all plans created in Setup → Payment Methods — for example, if you created a plan called "Maintenance 4 Installments", select it here and the maintenance amount will be split across 4 installments automatically.
Payment Type	<input type="radio"/> % — maintenance is calculated as a percentage of the unit price. <input type="radio"/> Amount — maintenance is a fixed monetary value.

The screenshot shows a form with four fields: "Name" (text input), "Amount" (text input), "Payment Method" (dropdown menu with "Maintenance" selected), and "Payment Type" (radio buttons with "%", "Amount", and "None" options, where "%" is selected). A blue "MAINTENANCE" label is positioned above the "Payment Method" dropdown.

Maintenance Priority Rule

If maintenance exists at multiple levels simultaneously (Project + Building Segment + Unit), the **unit-level maintenance takes priority** — only the unit-level maintenance is applied.

Maintenance in the Payment Plan

When a payment plan is created, the maintenance amount is shown separately as **Total Maintenance** — it's not included in the unit price total but is a separate obligation for the client.

Facilities

Facilities are optional add-ons to a unit's sale (e.g., Garage, Parking Slot, Club Membership). They can be added at the Project, Building Segment, or Unit level.

Facility Fields

Field	Description
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Name	Facility name (e.g., Club, Parking Slot, Garage).
Amount	Facility price.
Payment Method	Select which Global Payment Method to use for collecting this facility's cost. Same as maintenance — the dropdown shows all plans from Setup → Payment Methods . For example, select "4 Installments" to split the facility cost across 4 payments.
Added to Total Unit Price?	<input type="checkbox"/> = facility price is added to the unit's total price. <input type="checkbox"/> = facility is a separate charge not included in the unit price.
Calculated in Maintenance?	<input type="checkbox"/> = the facility price is included when calculating maintenance fees.

ADD FACILITY

<small>Name</small>	<small>Amount</small>	<small>Payment Method</small>	<small>Added to total unit price?</small>	<small>Calculated in Maintenance</small>	<small>Delete</small>
<input type="text" value="Name"/>	<input type="text" value="Amount"/>	<input type="text" value="maintenance 4 installments"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="Delete"/>

Facility Priority Rule

Same as payment plans — if facilities exist at multiple levels, **all of them are shown** to the salesman during the Hold step and they select which ones apply. If a facility is set at the Building Segment level, it only appears for units in that segment. If set at the Unit level, only for that specific unit.

Facility Merge Options (selected during Confirm Reservation step)

When confirming a reservation that includes a facility, you choose how to merge the facility cost into the payment plan:

Option	Description
Merge Facility on Payment Plan with Down Payment	Facility cost is split across ALL installments including the down payment.
Merge Facility on Payment Plan without Down Payment	Facility cost is split across all installments EXCEPT the down payment.
No selection	Facility appears as a completely separate standalone installment — not merged with any payment phase.

Merge Facility on Payment Plan with Down Payment
 Merge Facility on Payment Plan without Down Payment

<small>Select Facilities</small>	<small>Name</small>	<small>Amount</small>	<small>Payment Method</small>	<small>Payment Type</small>	<small>Included in Maintenance</small>
<input type="checkbox"/>	Garage	150000	Maintenance	Amount	No

CONFIRM & MOVE TO CONFIRM RESERVATION

Adding a Facility After Contract Stage

If a client buys a unit without a facility and later (e.g., after a year) decides they want one — you can add it from the **Contract step** using the **Add Facilities** button. The facility's installments are automatically added to the existing payment plan.

Admin

Refund Percentage

DISCARD CONTRACT

HIDE FACILITIES PERMANENT REFUND ADD PAYMENT VIEW PAYMENT DETAILS EDIT PAYMENTS

Facilities

Name	Amount	Payment Method	Payment Type	Included in Maintenance	SAVE FACILITIES
<input type="checkbox"/> Garage	150000	Maintenance	Amount	No	

PROFIT CRM

Contract Date: 2025-12-15

CONFIRM & MOVE TO DELIVERY

DOWNLOAD CONTRACT FORM

Payments

How the Payment Plan Appears in the Hold Step

When a salesman clicks Hold on a unit, the **Select Payment** section shows all available payment plans for that unit. Each plan is shown with:

- **Title** (e.g., TITLE: 3Y)
- **Type** breakdown (Down Payment, Quarterly, etc.)
- **Amount %** and calculated **Amount**
- **Count** (number of installments)
- **After Months from Contract date**
- **Mandatory Facilities** total
- **Total** unit price
- **Total Maintenance**

The salesman selects one plan using the radio button.

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Updated 2026-06-29 13:19:14 UTC by Admin