

Unit Sales Pipeline

Overview

The **Unit Sales Pipeline** tracks a unit from the moment it's shown to a client all the way through to delivery. Each step must be completed in order before moving to the next.

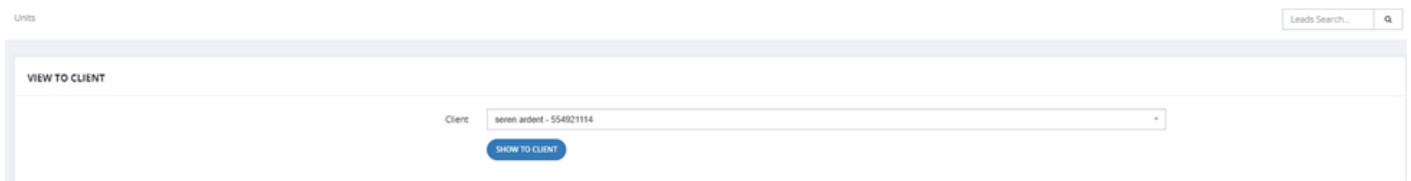
Show → Hold → Reservation → Confirm Reservation → Down Payment → Confirm Down Payment → Contract → Delivery

At the top of each unit's page, you can see all 8 steps with a counter showing how many units are at each stage.

Step 1 — Show

Who does it: Salesman

The salesman shows the unit to a client using the **View to Client** button in the Units tab. Multiple salesmen can show the same unit to multiple clients simultaneously — this step does not reserve the unit for anyone yet.



The screenshot shows a software interface for the 'Units' tab. At the top right, there is a 'Leads Search...' field with a magnifying glass icon. Below this, the main area is titled 'VIEW TO CLIENT'. In the center, there is a 'Client' dropdown menu with the text 'seren ardent - 554921114' and a small downward arrow. Below the dropdown is a blue button labeled 'SHOW TO CLIENT'.

Fields

Field	Description
Client	Select the client to show the unit to.
Reserve With	Optional online payment option (Credit/Debit Card or PayPal) if configured.
Hold Time in Hours	Override the default hold timer for this specific show.
Add Comment	Optional note.

Actions

Button	Description
Confirm & Move to Hold	Moves the unit to the Hold step for this client.
Discard Show	Cancels the show — unit goes back to available.

“☐ Once any salesman confirms a hold on a unit, it disappears from all other clients' show views automatically.

Step 2 — Hold

Who does it: Salesman / Operations

The client has confirmed interest — the unit is temporarily reserved. The salesman fills in the sale details here.

Admin , Sales Agent ,

DISCARD HOLD

Reserve With:

CREDIT/DEBIT CARD PAYPAL

Sales Man*

Offer

Reservation fees EOI Amount: 150000

Discount
Discount may change automatically when an NPV payment method is selected.

Broker

Broker Agent

Contract Date
You can leave it empty, and it will use today's date

Reservation Form

Select Payment

Unit Payment Methods					
	Type	Amount (%)	Amount	Count	After Months from reservation date
<input type="radio"/>	down_payment	10	1,536,000.00	1	0
<input type="radio"/>	quarterly	2	307,200.00	8	6
<input type="radio"/>	quarterly	3	460,800.00	8	33
<input type="radio"/>	deliver	50	7,680,000.00	1	50
	Mandatory Facilities :	0.00			
	Total :		15,360,000.00		

Fields

Field	Required	Description
Salesman	<input type="checkbox"/>	The salesman(s) responsible for this sale.
Offer	Optional	Select a promotional offer to apply — only active offers (within their date range) appear here. Configured in Financial Module → Manage Offers .
Reservation Fees	<input type="checkbox"/>	Amount paid as reservation fee. Enter <input type="text" value="0"/> if no fee applies. If Allow Select Reservation Fees Values is ON in Finance Settings, this becomes a dropdown with pre-configured values.
EOI Amount	—	If an EOI was previously submitted for this unit, the EOI amount is shown automatically here.
Discount	Optional	Discount percentage. Limited by the salesman's role discount limit (see Manage Discount). Note: "Discount may change automatically when an NPV payment method is selected."
Broker	Optional	Select the broker if this sale came through a broker.
Broker Agent	Optional	Select the broker's agent.
Contract Date	Optional	Can be left empty — system will use today's date.
Reservation Form	<input type="checkbox"/>	Choose which Reservation template to use (from Setup → Global Contracts).

Field	Required	Description
Select Payment	<input type="checkbox"/>	Choose the payment plan for this unit. All available plans from all levels (Global, Project, Building Segment, Unit) are shown. Select one using the radio button. Each plan shows: Type breakdown, Amount %, calculated Amount, Count (number of installments), After Months from reservation date, Mandatory Facilities total, Total unit price, Total Maintenance.
Reserve With	Optional	Online payment option (Credit/Debit Card, PayPal).

Actions

Button	Description
Confirm & Move to Reservation	Moves the unit to Reservation. A notification is automatically sent to Finance to check if reservation fees were collected.
Discard Hold	Cancels the hold — unit goes back to available.

Step 3 — Reservation

Who does it: Finance Team

Finance reviews the reservation and verifies that fees have been received.

Progress: Show, Hold, **Reservation**, Confirm Reservation, Down Payment, Confirm Down payment, Contract, Delivery

PRINT MULTIPLE INVOICES TOTAL PAID: 0

Unit Salesman: Admin,

Refund Percentage:

DISCARD RESERVATION VIEW PAYMENT DETAILS EDIT PAYMENTS

DOWNLOAD RESERVATION FORM

Contract Date: 2025-12-15
You can leave it empty, and it will use today's date

Select Payment: Building Segment Payment Methods

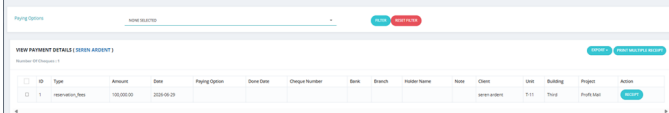

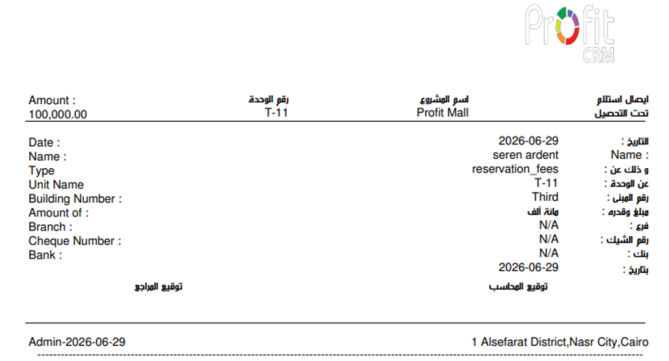
Type	Amount (%)	Amount	Count	After Months from reservation date
down_payment	10	898,936.50	1	0
quarterly	7.5	674,202.38	12	3
Mandatory Facilities :	0.00			
Total :		8,989,365.00		
Total Maintenance :		898,936.50		

Type	Amount (%)	Amount	Count	After Months from reservation date
down_payment	10	1,168,617.50	1	0
quarterly	6	701,170.50	20	3
Mandatory Facilities :	0.00			
Total :		11,686,175.00		
Total Maintenance :		1,168,617.50		

Fields

Field	Description
Refund Percentage	If discarding the reservation, enter the refund % to return to the client.
Contract Date	Can still be changed at this stage.
Select Payment	Payment plan can still be changed at this stage.

Actions

Button	Description
Confirm & Move to Confirm Reservation	Moves to the next step after verifying fees are collected.
Discard Reservation	Cancels — unit returns to available. Refund percentage applies if fees were paid.
Download Reservation Form	Download the reservation form.
View Payment Details	Shows only the Reservation Fees installment at this stage. 
Edit Payments	Modify payment plan — still editable at this stage. Only the Reservation Fees installment is visible in the payments section at this step. 
Print Multiple Invoices	Print invoices for Reservation fees. Serial : 1034 

Step 4 — Confirm Reservation

Who does it: Finance Team

Finance confirms that reservation fees have been fully received. **This is the last step where the payment plan and facilities can be changed.**

Show Hold Reservation **Confirm Reservation** Down Payment Confirm Down payment Contract Delivery

UNIT: 1-11 PRINT MULTIPLE INVOICES TOTAL PAID: 100,000

Unit Salesman
Admin,

DISCARD CONFIRM RESERVATION VIEW PAYMENT DETAILS EDIT PAYMENTS
You can leave it empty, and it will use today's date DOWNLOAD RESERVATION FORM

Select Payment

Building Segment Payment Methods

Type	Amount (%)	Amount	Count	After Months from reservation date
TITLE : 3 Y				
down_payment	10	898,936.50	1	0
quarterly	7.5	674,202.38	12	3
Mandatory Facilities :	0.00			
Total :		8,989,365.00		
Total Maintainance :		898,936.50		
TITLE : 5 Y				
down_payment	10	1,168,617.50	1	0
quarterly	6	701,170.50	20	3
Mandatory Facilities :	0.00			
Total :		11,686,175.00		
Total Maintainance :		1,168,617.50		

Fields

Field	Description
Contract Date	Can still be changed here.
Select Payment	Payment plan can still be changed here — last chance before locking.
Select Facilities	Choose which facilities to add to this unit's sale (e.g., Garage, Parking). For each selected facility, choose how to merge its cost into the payment plan:

Facility merge options:

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 standalone separate installment on its own.

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

Select Facilities


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

CONFIRM & MOVE TO CONFIRM RESERVATION

Payments Section

The full payment schedule appears below the form — you can review all installments before confirming.

Actions

Button	Description																																													
Confirm & Move to Down Payment	Moves to Down Payment. Finance gets a notification. facilities are now locked .																																													
Discard Confirm Reservation	Steps back to Reservation.																																													
Download Reservation Form	Download reservation form.																																													
View Payment Details	Shows only the Reservation Fees installment at this stage.																																													
Edit Payments	Modify payment plan — last chance . Only the Reservation Fees installment is visible in the payments section at this step.																																													
Print Multiple Invoices	Print invoices for Reservation fees. Invoice Serial : 1034  <table border="1"><thead><tr><th>Amount :</th><th>رقم الوحدة</th><th>اسم العميل</th><th>اسم المشروع</th><th>ايصال استلام</th></tr></thead><tbody><tr><td>100,000.00</td><td>T-11</td><td>Third</td><td>Profit Mall</td><td>N/A</td></tr></tbody></table> <table><tbody><tr><td>Collection Date :</td><td>2025-12-15 13:54:46</td><td>تاريخ التحصيل :</td></tr><tr><td>Name :</td><td>seren ardent</td><td>Name :</td></tr><tr><td>Payment Type :</td><td>reservation_fees</td><td>و قالب عن :</td></tr><tr><td>Unit name :</td><td>T-11 - Profit Mall</td><td>عن الوحدة :</td></tr><tr><td>Building Number :</td><td>Third</td><td>رقم العميل :</td></tr><tr><td>Amount of :</td><td>مائة ألف جنيه فقط لا غير</td><td>مبلغ و قدره :</td></tr><tr><td>Branch :</td><td>N/A</td><td>فرع :</td></tr><tr><td>Cheque Number :</td><td>N/A</td><td>رقم الشيك :</td></tr><tr><td>Bank :</td><td>N/A</td><td>بنك :</td></tr><tr><td>note :</td><td>N/A</td><td>ملاحظات :</td></tr><tr><td>Due Date :</td><td>2026-06-29</td><td>تاريخ الدفع :</td></tr></tbody></table> <table><tbody><tr><td>توقيع العميل</td><td>توقيع المحاسب</td></tr></tbody></table> <hr/> <p>Admin-2026-06-29 01:58:18 1 Aisefarat District,Nasr City,Cairo</p> Invoice Serial : 1034	Amount :	رقم الوحدة	اسم العميل	اسم المشروع	ايصال استلام	100,000.00	T-11	Third	Profit Mall	N/A	Collection Date :	2025-12-15 13:54:46	تاريخ التحصيل :	Name :	seren ardent	Name :	Payment Type :	reservation_fees	و قالب عن :	Unit name :	T-11 - Profit Mall	عن الوحدة :	Building Number :	Third	رقم العميل :	Amount of :	مائة ألف جنيه فقط لا غير	مبلغ و قدره :	Branch :	N/A	فرع :	Cheque Number :	N/A	رقم الشيك :	Bank :	N/A	بنك :	note :	N/A	ملاحظات :	Due Date :	2026-06-29	تاريخ الدفع :	توقيع العميل	توقيع المحاسب
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“ ⚠ After confirming and moving to Down Payment, the **facilities cannot be changed** — the facility selection disappears from this point on. The payment plan can still be changed in the Down Payment step. Only paying option, date, cheque number, bank, and notes can be edited on individual installments from the Contract step onwards.

☐ To print a receipt for a payment: click **View Payment Details** → find the payment row → click **Receipt**.

“☐ To add custom fields to the receipt, go to **Setup** → **Fields Setup** → **edit a field** → **set Receipt to True**.

Step 5 — Down Payment

Who does it: Finance Team

The down payment phase begins. Finance collects the down payment installment.

“⚠ **This is the last step where you can change the payment plan.** Once you confirm and move to Confirm Down Payment, the payment plan is locked and cannot be changed.

UTILS

Show Hold Reservation Confirm Reservation **Down Payment** Confirm Down payment Contract Delivery

THIRD - 3 Y PRINT MULTIPLE INVOICES TOTAL PAID: 100,000

Unit Salesman
Admin,

EDIT PAYMENTS VIEW PAYMENT DETAILS ADD PAYMENT PERMANENT REFUND

Refund Percentage

DISCARD DOWN PAYMENT

Contract Date: 2025-12-15
You can leave it empty, and it will use today's date

Select Payment Building Segment Payment Methods

Type	Amount (%)	Amount	Count	After Months from reservation date
down_payment	10	898,936.50	1	0
quarterly	7.5	674,202.38	12	3
Mandatory Facilities:	0.00			
Total:	8,989,365.00			
Total Maintenance:	898,936.50			

Type	Amount (%)	Amount	Count	After Months from reservation date
down_payment	10	1,168,617.50	1	0
quarterly	6	701,170.50	20	3
Mandatory Facilities:	0.00			
Total:	11,686,175.00			

Fields


Field	Description
-------	-------------

Refund Percentage	Refund % applied if discarding.
Contract Date	Shown for reference — still editable at this stage.
Select Payment	Payment plan shown — can still be changed at this stage (but facilities are already locked).

Payments Section

Only the **Down Payment** installment is visible at this stage — the full payment schedule (all installments) only becomes visible once the unit reaches the **Contract** step.

Actions

Button	Description																																																				
Edit Payments	Modify paying option, date, cheque/bank details on individual installments.																																																				
View Payment Details	Shows only the Down Payment installment at this stage.																																																				
Add Payment	Add an extra payment not in the original plan. Fields: Payment Date, Type, Amount, Count, Duration per month. Example: client bought a semi-finished unit and later wants fully finished — the price difference is added here as a new payment.																																																				
Permanent Refund	Initiate a full permanent refund. Enter: Amount (% to refund from total paid) and Type. Click Refund. The unit returns to Available or Hidden depending on the Return Refunded and Discarded Units to Hide setting in Finance Settings.																																																				
Discard Down Payment	Steps back to Confirm Reservation.																																																				
Print Multiple Invoices	Print invoices for Down payment. Serial : 1036  <table border="0"> <tr> <td>Amount :</td> <td>رقم الوحدة</td> <td>اسم المشروع</td> <td>ايصال اسئلة</td> </tr> <tr> <td>-9,590,000.00</td> <td>G-12</td> <td>Profit Mall</td> <td>تحت التصيل</td> </tr> <tr> <td>Date :</td> <td></td> <td>2026-06-29</td> <td>التاريخ :</td> </tr> <tr> <td>Name :</td> <td></td> <td>kamal ali Mohamed</td> <td>Name :</td> </tr> <tr> <td>Type :</td> <td></td> <td>down_payment</td> <td>و ذلك عن :</td> </tr> <tr> <td>Unit Name :</td> <td></td> <td>G-12</td> <td>عن الوحدة :</td> </tr> <tr> <td>Building Number :</td> <td></td> <td>Ground</td> <td>رقم العنبر :</td> </tr> <tr> <td>Amount of :</td> <td></td> <td>سالب تسعة ملايين و تسعون الف</td> <td>مبلغ و قدره :</td> </tr> <tr> <td>Branch :</td> <td></td> <td>N/A</td> <td>فرع :</td> </tr> <tr> <td>Cheque Number :</td> <td></td> <td>N/A</td> <td>رقم الشيك :</td> </tr> <tr> <td>Bank :</td> <td></td> <td>N/A</td> <td>بنك :</td> </tr> <tr> <td></td> <td></td> <td>2025-10-07</td> <td>بتاريخ :</td> </tr> <tr> <td></td> <td>توقيع المراجع</td> <td></td> <td>توقيع المحاسب</td> </tr> </table>	Amount :	رقم الوحدة	اسم المشروع	ايصال اسئلة	-9,590,000.00	G-12	Profit Mall	تحت التصيل	Date :		2026-06-29	التاريخ :	Name :		kamal ali Mohamed	Name :	Type :		down_payment	و ذلك عن :	Unit Name :		G-12	عن الوحدة :	Building Number :		Ground	رقم العنبر :	Amount of :		سالب تسعة ملايين و تسعون الف	مبلغ و قدره :	Branch :		N/A	فرع :	Cheque Number :		N/A	رقم الشيك :	Bank :		N/A	بنك :			2025-10-07	بتاريخ :		توقيع المراجع		توقيع المحاسب
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	توقيع المراجع		توقيع المحاسب																																																		

“ A **Finance notification** is triggered when the unit first enters this step.

Step 6 — Confirm Down Payment

Who does it: Finance Team

Finance confirms the down payment has been received. The contract template is selected here.

THIRD - T.11

PRINT MIA/TIPLE INVOICES TOTAL PAID: \$98,937

Unit Salesman
Admin,

DISCARD CONFIRM DOWN PAYMENT PERMANENT REFUND ADD PAYMENT VIEW PAYMENT DETAILS EDIT PAYMENTS

Contract Date: 2025-12-15
Unit Maintenance

Type	Amount (%)	Amount	Count	After Months from reservation date
maintenance	100	\$898,936.50	1	24

Total : \$898,936.50

Broker:

Select Contract * Profit___CRM

CONFIRM & MOVE TO CONTRACT

Payments

Fields

Field	Description
Contract Date	Shown for reference.
Unit Maintenance	Maintenance fees and schedule are shown here.
Broker	Broker associated with this sale.
Select Contract	Choose which contract template to use (from Setup → Global Contracts).

Actions

Button	Description
Confirm & Move to Contract	Moves to Contract step.
Discard Confirm Down Payment	Steps back to Down Payment.
Permanent Refund	Full permanent refund option.
Add Payment	Add extra payment.
View Payment Details	Shows only the Down Payment installment at this stage.

Button	Description
Edit Payments	Limited editing only — only the Down Payment installment is visible at this step.

Step 7 — Contract

Who does it: Finance Team

The contract is active. This is the main payment collection stage — the finance team collects installments as they come due throughout the entire contract duration.

Top Bar

Shows: **Total Paid** | **Total Remaining** | **Total Amount** — color-coded for quick visibility.

Payment Row Colors

Color	Meaning
Teal (collected)	Payment has been collected — Export button available.
Pink/Red (delayed)	Due date passed, not yet paid — PAY, ATTACH, Update Payment Status available.

Color	Meaning
White (upcoming)	Future installment not yet due — PAY, ATTACH available.

“ Payments shown in **red/pink** = delayed. Finance should follow up on these.

Collecting a Payment (PAY)

Click **PAY** on any installment row. The Pay screen shows:

Field	Description
Pay	Full payment (default).
Pay Partially	Enable to collect a partial amount. Enter the amount. You can add multiple partial payments using Add Payment — each with its own date and amount.
Total	Total being collected.
Diff	The difference between installment amount and what's being collected.
Is Penalty or client benefit	Check this if the Diff should be recorded as a penalty — it moves to the Penalties tab. If unchecked, the Diff is recorded as a client benefit — it moves to the Client Benefits tab.
Note	Free text note.
Paying Options	Payment method (Cheque, Cash, Transfer, Deposit, etc.). Configured in Finance Settings → Paying Options.
Collection Date	The actual date the payment was physically received — different from the logging date. Example: client gave a cheque on Thursday at 6PM but bank is closed, you'll process it Sunday. Set Collection Date to Thursday.

Pay

Total : 1,497,932.00^x

Pay

Pay Partially

0

ADD PAYMENT

2026-07-01

0

Delete

Total :

Diff :

Is Penalty

Note

Paying Options

Select

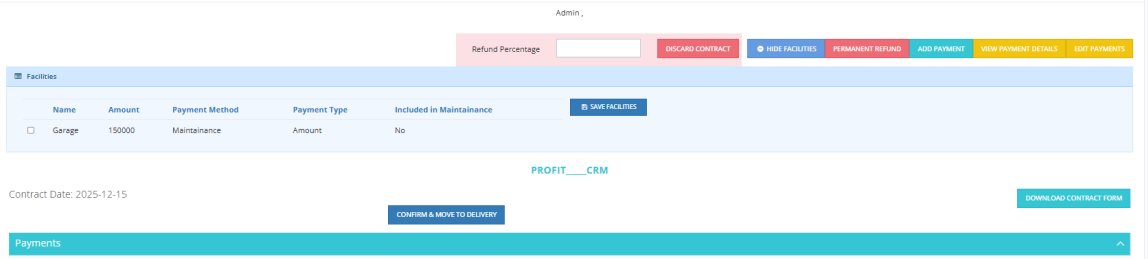
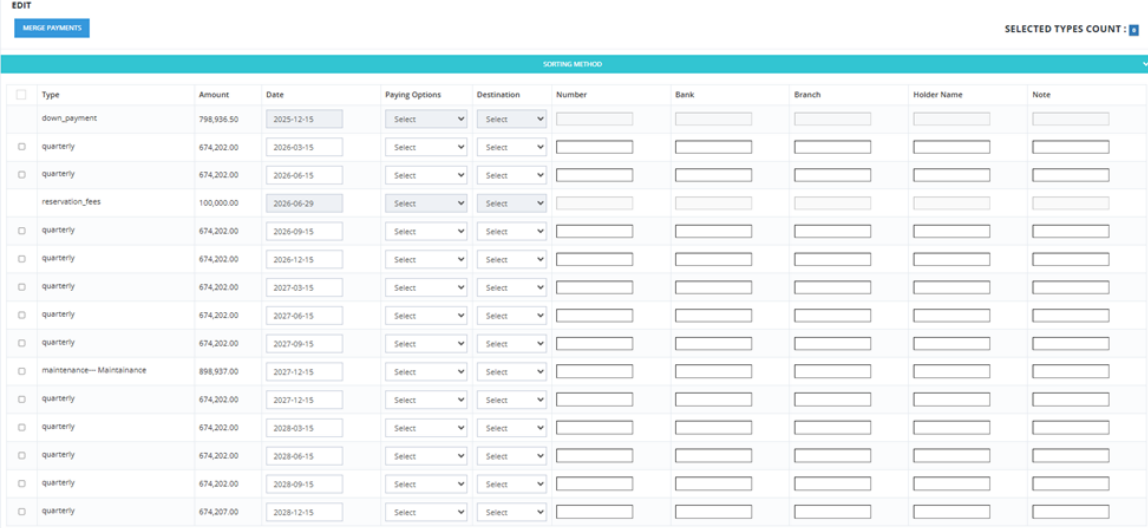
Collection Date

Collection Date

PAY

Actions

Button	Description
PAY	Collect an installment.
ATTACH	Upload a document for a specific payment (e.g., cheque scan, transfer receipt).
EXPORT	Export collected payments.
Update Payment Status	Set a status (e.g., "contacted", "in progress", "pending") and note on a pending payment. Statuses configured in Finance Settings → Late Payment Status.
Download Contract Form	Download the signed contract document.

Button	Description
<p>Add Facilities</p>	<p>Add a new facility after contract stage. Example: client bought without a garage then decided they want one — add it here. The facility's installments are automatically added to the payment plan.</p> 
<p>Add Payment</p>	<p>Add an extra payment to the plan.</p> <p>ADD PAYMENT</p> <p>Payment Date: <input type="text"/></p> <p>Type: <input type="text" value="type"/></p> <p>Amount: <input type="text" value="Amount"/></p> <p>Count: <input type="text" value="Count"/></p> <p>Duration per month: <input type="text" value="Duration per month"/></p> <p>ADD</p>
<p>Permanent Refund</p>	<p>Full permanent refund — returns unit to available or hidden.</p> <p>REFUND</p> <p>Amount: <input type="text"/></p> <p><small>The percentage to be refunded from all amount paid</small></p> <p>Type: <input type="text" value="Select"/></p> <p><small>The percentage to be refunded from all amount paid</small></p> <p>REFUND</p>
<p>View Payment Details</p>	<p>Full payment schedule — click Receipt on any collected payment to print its receipt.</p>
<p>Edit Payments</p>	<p>Limited editing — paying option, date, cheque/bank/branch/holder name/note only. Merge Payments button available to merge selected installments of the same type.</p> 
<p>Discard Contract</p>	<p>Steps back to Confirm Down Payment.</p>
<p>Print Multiple Invoices</p>	<p>Print invoices for multiple selected payments at once.</p>

Step 8 — Delivery

Who does it: Finance Team

The unit has been delivered to the client. This is the final stage. Any remaining installments continue to be collected normally from this screen.

Top Bar

Shows: **Total Paid** | **Total Remaining** | **Total Amount**.

Unit Salesman
Admin

DISCARD DELIVERY

#	Type	Amount	Client	Delivery Date	Pay Option	Cheque	Bank	Status & Note	Actions
	Reservation fees	500,000	mona eliraqi	2025-11-04					EXPORT
	down_payment	324,432	mona eliraqi	2025-11-04					EXPORT
	Quarterly	607,074	mona eliraqi	2026-02-04					PAY ATTACH
	Quarterly	607,074	mona eliraqi	2026-05-04					PAY ATTACH
	Quarterly	607,074	mona eliraqi	2026-08-04					PAY ATTACH
	Quarterly	607,074	mona eliraqi	2026-11-04					PAY ATTACH

Available Actions

Same as Contract step — PAY, ATTACH, EXPORT, Update Payment Status, Edit Payments, View Payment Details, Print Multiple Invoices.

Button	Description
Discard Delivery	Steps back to Contract.

“ ” After Delivery, the client has officially received their unit. The finance team continues to collect any remaining installments from this screen exactly as they did in the Contract step.

Key Notes Across All Steps

- **Print Multiple Invoices** — Available from Confirm Reservation onwards.
 - **Total Paid counter** — Always visible at the top right showing cumulative collected amount.
 - **Unit Salesman** — Shown at the top of every step page.
 - **Pipeline Progress Bar** — Shows all 8 steps at the top with a count of units at each stage — click any step to jump to it.
 - **Red/Pink payments** = delayed installments that need follow-up.
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