8. EOI

Track client intent before units are ready — from EOI registration and serial-based priority, through collection and reservation, to refunds.

EOI Module — Overview

Overview

EOI stands for **Expression of Interest**. It lets the company collect a client's intent to buy a unit in a project — even before the project has a finalized master plan or units ready for sale.

Why Use EOI

Companies often announce a new project (pre-launch) before they have:

- A finalized master plan
- Units priced and available in the system
- A formal selling plan

In this case, the company collects an EOI amount from interested clients to register their intent. Once the project is ready, the company has an ordered list of interested clients and can start allocating units based on registration priority.

The Serial — Priority Order

Every EOI is automatically assigned a **Serial Number** at the time of registration. This serial determines the order in which clients get to choose a unit once the project is ready.

Rule	Description
Lower Serial = Higher Priority	The client who registered first (lowest serial) gets the first opportunity to choose and reserve a unit.
Sequential Allocation	Once units become available, the company works through clients in serial order.
Skipping	If a client (based on their turn) doesn't like any available unit, they are refunded and the turn moves to the next client in serial order.

EOI Lifecycle

Status	Description
Pending	EOI has been created but the amount has not yet been collected.
Collected	The EOI amount has been collected and confirmed in the system.
Reserved	The client has reserved a unit — moves into the standard Unit Sales Pipeline starting at Hold.
Refunded	The client withdrew or didn't reserve a unit — the EOI amount is returned.

```
Pending → Collected → Reserved (→ Selling Pipeline)
                   → Refunded
```

Where EOI Actions Can Be Performed

Location	Description
Client Profile → View Client EOIs	All EOIs related to this specific client, with actions available directly.
Financial Module → EOI Management	A central list of all EOIs across all clients and projects, with filters and bulk actions.

Module Pages

Page	Description
Creating a New EOI	The Add New EOI form and related configuration settings.
EOI Management	The central EOI list, columns, and filters.
Collect Action	How to record collection of the EOI amount.
Reserve & Selling Pipeline	How a unit is reserved and how it enters the Hold stage.

Page	Description
Refund Action	Refund policies and how they vary by company.

Creating a New EOI

Overview

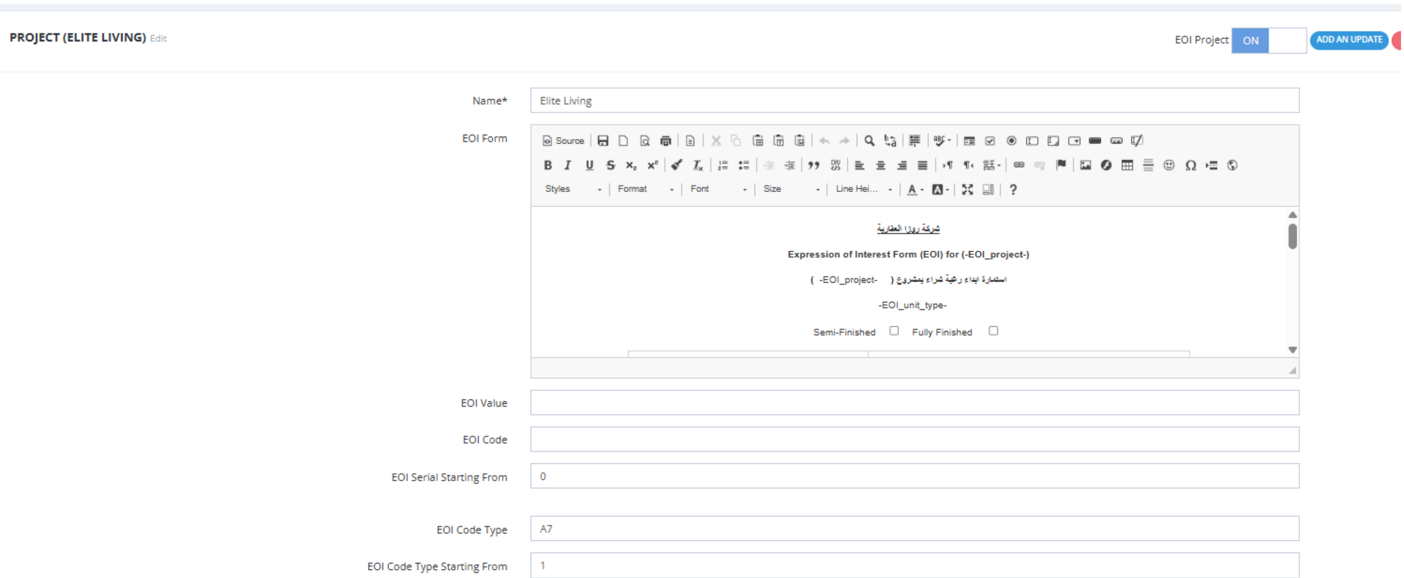
Use **Add New EOI** to register a client's expression of interest in a project before reserving an actual unit.

Enabling EOI on a Project

Before a project can receive EOIs, EOI must be enabled on that specific project.

1. Go to **Edit Project**.
2. Find the **EOI** toggle at the top right.
3. Turn it **On**.

> ⚠ If the toggle is **Off**, the EOI fields below do not appear and no EOI actions can be performed on that project.



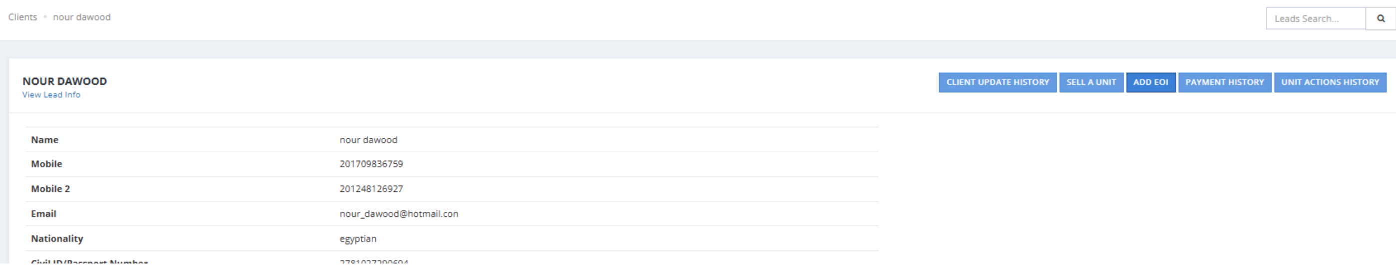
Once turned on, the following fields appear for configuration:

Setting	Description
EOI Form	The document template used for the EOI form — set up the same way as any other contract template in the system.
EOI Value	A default suggested value for the EOI amount.
EOI Code	An identifying code format for EOIs on this project.
EOI Serial Starting From	The number new EOI serials will start counting from, for this project.
EOI Code Type	The code type used for EOI numbering on this project.
EOI Code Type Starting From	The number the code type serial will start counting from, for this project.

> ⚠ These settings directly control the **Serial** and **Code Type Serial** values shown in EOI Management, which determine client priority order — see the Overview page.

How to Add a New EOI

1. Go to **Client Profile → Add EOI.**
2. Fill in the fields below.
3. Click **Create**.

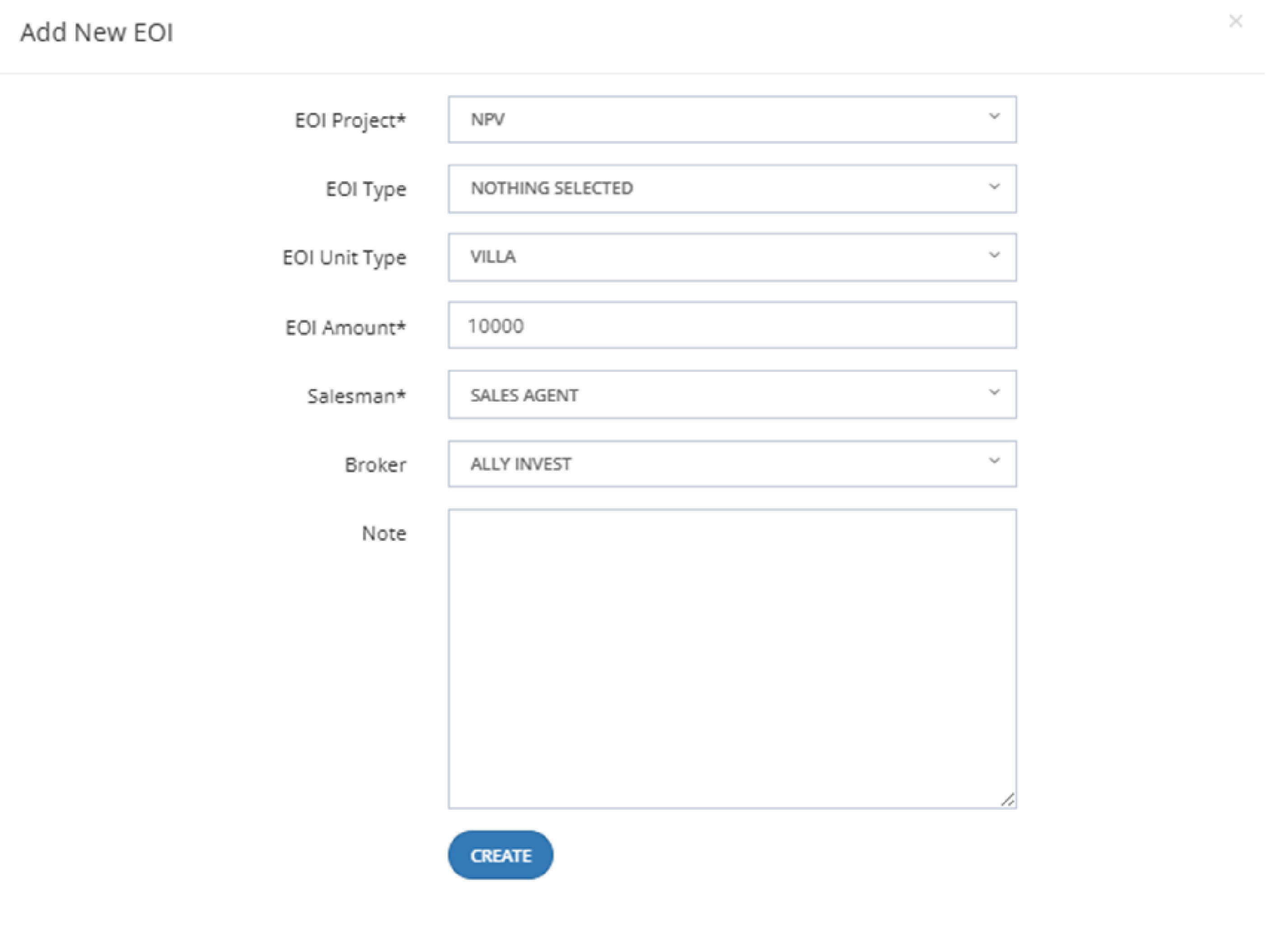


Fields

Field	Required	Description
EOI Project	▯	The project this EOI is linked to. Only projects with EOI enabled (see above) appear in this list.
EOI Type	Optional	Classification of the EOI, if used.

Field	Required	Description
EOI Unit Type	Optional	The type of unit the client is interested in (e.g., Villa, Apartment, Twin).
EOI Amount	□	The amount registered for this EOI.
Salesman	□	The salesman responsible for this client.
Broker	Optional	The broker associated with this client, if any.
Note	Optional	Any additional notes.

> □□ Example: Project "NPV", Unit Type "Villa", EOI Amount "10000", Salesman "Sales Agent", Broker "Ally Invest".



After Creation

Once created, the EOI status is **Pending** and it appears in **EOI Management**, ready for the next step — **Collect**.

EOI Actions & Management

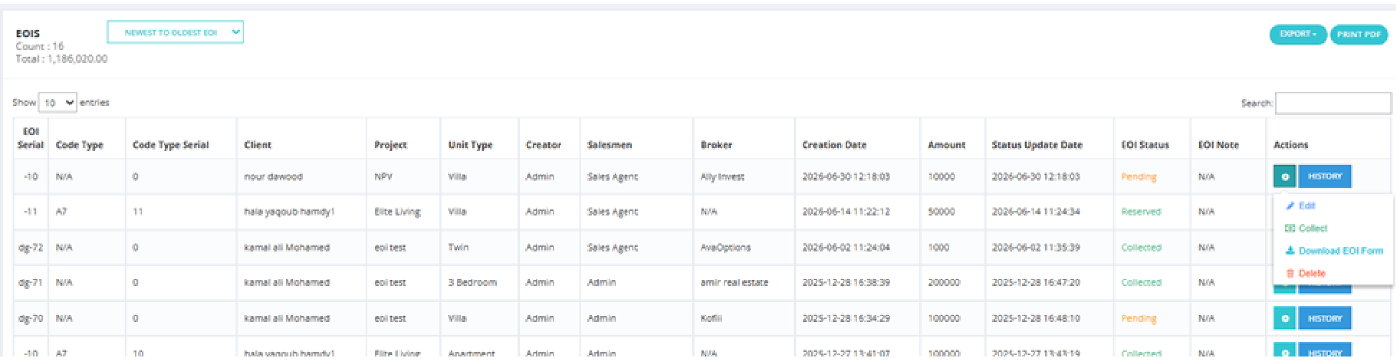
EOI Management

Overview

EOI Management is the central screen, under **Financial Module**, that lists every EOI in the system across all clients and projects.

What You See

The page header shows **Count** (total EOIs displayed) and **Total** (combined EOI value), with a sort option **Newest to Oldest EOI**.



Columns

Column	Description
EOI Serial	The sequential number determining priority — see the Overview page.
Code Type	The code type assigned to the EOI.
Code Type Serial	The sequential number within that code type.
Client	The client's name.

Column	Description
Project	The project linked to this EOI.
Unit Type	The type of unit the client is interested in.
Creator	The user who created the EOI.
Salesmen	The assigned salesman.
Broker	The broker, if any.
Creation Date	Date the EOI was created.
Amount	The EOI amount.
Status Update Date	Date the status was last changed.
EOI Status	Current status (Pending, Collected, Reserved, etc.).
EOI Note	Any notes on the EOI.
Actions	Available actions — vary by status, see below.

Actions by Status

Status	Available Actions
Pending	Edit, Collect, Download EOI Form, Delete
Collected	Reserve, Refund, Download EOI Form

Each action is covered in detail on its own page: **Collect Action**, **Reserve & Selling Pipeline**, **Refund Action**.

> The same actions are also available from **Client Profile → View Client EOIs**, without needing to go through EOI Management.

Available Actions

- **Export** — export the EOI list.
- **Print PDF** — print a PDF report of the current view.

Available Filters

Filter	Description
Project	Filter by project.
Client	Filter by client name.
Broker	Filter by broker.
EOI Payment Status	Filter by payment status.
Salesman	Filter by assigned salesman.
Creation Date	Filter by creation date (From / To).
Last Update Date	Filter by the date the status was last updated.

Collect Action

Overview

Use **Collect** to record that the EOI amount has actually been received from the client. This moves the EOI from **Pending** to **Collected**.

How to Collect an EOI Amount

1. From **EOI Management** (or Client Profile → View Client EOIs), find the EOI in **Pending** status.
2. Click **Collect** in the Actions column.
3. Fill in the fields below.
4. Click **Collect** to confirm, or **Cancel** to close without saving.

Fields

Field	Description

Type	The collection type — defaults to `eoi_amount`.
Amount	The amount to collect — pre-filled from the EOI amount.
Delivery Date	The due/delivery date for this collection.
Paying Options	The payment method used.
Cheque Number	Cheque number, if paying by cheque.
Bank Name	The bank name, if applicable.
Branch Name	The branch name, if applicable.
Account Holder Name	The name on the paying account.
Payment Note	Free text note.

Collect EOI Amount

×

Type

eoi_amount

Amount

10000

Delivery Date

Select Delivery Date

Paying Options

SELECT PAYING OPTION

Cheque Number

Enter Cheque Number

Bank Name

Enter Bank Name

Branch Name

Enter Branch Name

Account Holder Name

Enter Account Holder Name

Payment Note

Enter Payment Note

CANCEL

COLLECT

After Collection

Before	After
EOI Status: **Pending**	EOI Status: **Collected**
Actions: Edit, Collect, Download EOI Form, Delete	Actions: Reserve, Refund, Download EOI Form

From here, the client can either:

- **Reserve** a unit — see Reserve & Selling Pipeline.
- **Refund** — see Refund Action.

> Collect is what separates a simple registered intent (Pending) from a confirmed, paid commitment (Collected).

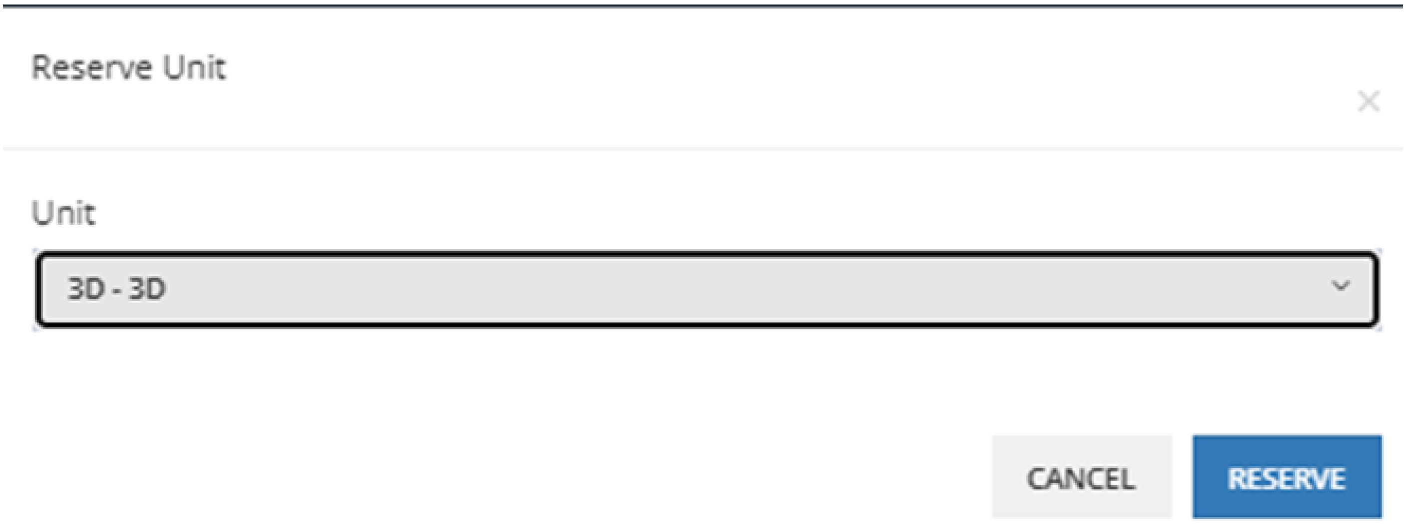
Reserve & Selling Pipeline

Overview

Once an EOI is **Collected**, use **Reserve** if the client decides to reserve an actual unit in the project.

How to Reserve a Unit

1. From **EOI Management** (or Client Profile → View Client EOIs), find the EOI in **Collected** status.
2. Click **Reserve** in the Actions column.
3. Select a unit from the **Unit** dropdown — this list shows only **Available** units in the project linked to the EOI.
4. Click **Reserve** to confirm, or **Cancel**.



> □□ Only units with status Available in the EOI's project appear in this list — not the full inventory.

Entering the Selling Pipeline

Once reserved, the unit enters the standard **Unit Sales Pipeline** at the **Hold** step:

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

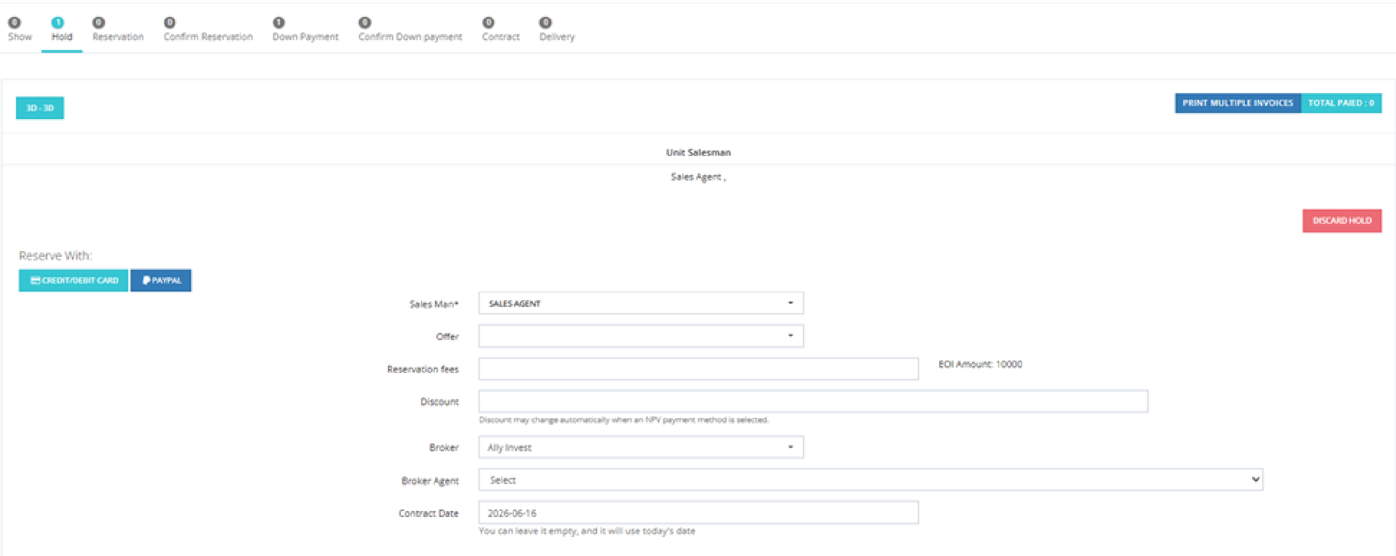
> See **Unit Sales Pipeline** for the full breakdown of every step after Hold.

Hold Step Fields (from EOI)

When the unit enters Hold, the following fields are available to complete the sale:

Field	Required	Description
Sales Man	□	Pre-filled from the EOI's salesman — can be changed.
Offer	Optional	Any promotional offer linked to the unit.

Field	Required	Description
Reservation Fees	▯	Actual reservation fee — shown alongside the original **EOI Amount** for comparison.
Discount	Optional	Discount applied. May change automatically depending on the payment method selected.
Broker	Optional	Pre-filled from the EOI's broker — can be changed.
Broker Agent	Optional	The broker's agent.
Contract Date	Optional	Can be left empty — system uses today's date.



A **Reserve With** option (Credit/Debit Card or PayPal) and **Discard Hold** are also available, same as a standard Hold step.

Refund Action

Overview

Use **Refund** when a client, after their EOI amount has been collected, decides not to continue — either by choice or because no available unit suits them.

How to Refund an EOI

1. From **EOI Management** (or Client Profile → View Client EOIs), find the EOI in **Collected** status.
2. Click **Refund** in the Actions column.
3. Confirm the refund.

Refund and the Serial Order

As covered in the Overview page, EOIs are prioritized by **Serial**. If a client (based on their turn) chooses to refund instead of reserve a unit, their turn passes automatically to the next client in serial order — allocation continues uninterrupted.

Refund Policies Vary by Company

This is an important business rule to document, since refund policy is not a fixed system setting — it's a company decision applied manually each time:

Policy	Description
Full Refund	The full amount is returned to the client. If they register interest in another project, a new EOI and a new payment are required — the process restarts from scratch.
Partial Refund (fees deducted)	The company keeps the reservation fees and returns only the remaining balance to the client.

> ⚠ Confirm which policy your company follows before processing a Refund — this is a business decision, not a system default.

Refund vs. Discard Hold

Action	What It Does

Discard Hold	Cancels the unit's hold in the Unit Sales Pipeline only — does not touch the EOI amount itself.
Refund	Returns the collected EOI amount to the client — the correct action when cancelling the process entirely, not just stepping back from one unit.

This covers the full EOI lifecycle: registration (Pending), collection (Collected), and the two possible outcomes — Reserve (into the Selling Pipeline) or Refund.