

# 8. EOI

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

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# 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.

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## 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.

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## 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
<b>Lower Serial = Higher Priority</b>	The client who registered first (lowest serial) gets the first opportunity to choose and reserve a unit.
<b>Sequential Allocation</b>	Once units become available, the company works through clients in serial order.
<b>Skipping</b>	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.

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# EOI Lifecycle

Status	Description
<b>Pending</b>	EOI has been created but the amount has not yet been collected.
<b>Collected</b>	The EOI amount has been collected and confirmed in the system.
<b>Reserved</b>	The client has reserved a unit — moves into the standard Unit Sales Pipeline starting at Hold.
<b>Refunded</b>	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
<b>Client Profile → View Client EOIs</b>	All EOIs related to this specific client, with actions available directly.
<b>Financial Module → EOI Management</b>	A central list of all EOIs across all clients and projects, with filters and bulk actions.

## Module Pages

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

<b>Page</b>	<b>Description</b>
<b>Refund Action</b>	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.

The screenshot shows the 'PROJECT (ELITE LIVING) Edit' interface. At the top right, the 'EOI Project' toggle is set to 'ON', with an 'ADD AN UPDATE' button next to it. Below this, the 'Name\*' field contains 'Elite Living'. The 'EOI Form' field is a rich text editor containing the following text: 'تعبئة رغبة السكنية', 'Expression of Interest Form (EOI) for (-EOI\_project-)', 'استمارة إنشاء رغبة شراء بمشروع (-EOI\_project-)', and 'EOI\_Unit\_Type-'. Below the text editor, there are two radio buttons: 'Semi-Finished' (selected) and 'Fully Finished'. Below these are several input fields: 'EOI Value', 'EOI Code', 'EOI Serial Starting From' (with value '0'), 'EOI Code Type' (with value 'A7'), and 'EOI Code Type Starting From' (with value '1').

Once turned on, the following fields appear for configuration:

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

Clients - nour dawood Leads Search... 🔍

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**NOUR DAWOOD**  
View Lead Info CLIENT UPDATE HISTORY | SELL A UNIT | **ADD EOI** | PAYMENT HISTORY | UNIT ACTIONS HISTORY

Name	nour dawood
Mobile	201709836759
Mobile 2	201248126927
Email	nour_dawood@hotmail.com
Nationality	egyptian
Client ID / Personal Number	175107750624

## Fields

Field	Required	Description
<b>EOI Project</b>	<input type="checkbox"/>	The project this EOI is linked to. Only projects with EOI enabled (see above) appear in this list.
<b>EOI Type</b>	Optional	Classification of the EOI, if used.

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

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

### Add New EOI



EOI Project\*

EOI Type

EOI Unit Type

EOI Amount\*

Salesman\*

Broker

Note

**CREATE**

# 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**.

The screenshot shows the EOI Management interface. At the top, it displays 'EOIS Count : 16 Total : 1,186,020.00' and a dropdown menu set to 'NEWEST TO OLDEST EOI'. There are 'EXPORT' and 'PRINT PDF' buttons. Below the header, there is a 'Show 10 entries' dropdown and a search bar. The main table has the following columns: EOI Serial, Code Type, Code Type Serial, Client, Project, Unit Type, Creator, Salesmen, Broker, Creation Date, Amount, Status Update Date, EOI Status, EOI Note, and Actions. The Actions column contains buttons for 'HISTORY', 'EDIT', 'COLLECT', 'DOWNLOAD EOI FORM', and 'DELETE'.

EOI Serial	Code Type	Code Type Serial	Client	Project	Unit Type	Creator	Salesmen	Broker	Creation Date	Amount	Status Update Date	EOI Status	EOI Note	Actions
-10	N/A	0	nour dawood	NPV	Villa	Admin	Sales Agent	Ally Invest	2026-06-30 12:18:03	10000	2026-06-30 12:18:03	Pending	N/A	HISTORY
-11	A7	11	hala yaqoub hamdy1	Elite Living	Villa	Admin	Sales Agent	N/A	2026-06-14 11:22:12	50000	2026-06-14 11:24:34	Reserved	N/A	EDIT COLLECT DOWNLOAD EOI FORM DELETE
dg-72	N/A	0	kamal ali Mohamed	eoi test	Twin	Admin	Sales Agent	AvaOptions	2026-06-02 11:24:04	1000	2026-06-02 11:35:39	Collected	N/A	DELETE
dg-71	N/A	0	kamal ali Mohamed	eoi test	3 Bedroom	Admin	Admin	amir real estate	2025-12-28 16:38:39	200000	2025-12-28 16:47:20	Collected	N/A	DELETE
dg-70	N/A	0	kamal ali Mohamed	eoi test	Villa	Admin	Admin	Kofili	2025-12-28 16:34:29	100000	2025-12-28 16:48:10	Pending	N/A	HISTORY
-10	A7	10	hala unrouh hamdy1	File 1 inline	Apartment	Admin	Admin	N/A	2026-12-27 19:41:07	100000	2026-12-27 19:41:19	Collected	N/A	HISTORY

### Columns

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

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

## Actions by Status

Status	Available Actions
<b>Pending</b>	Edit, Collect, Download EOI Form, Delete
<b>Collected</b>	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
<b>Project</b>	Filter by project.
<b>Client</b>	Filter by client name.
<b>Broker</b>	Filter by broker.
<b>EOI Payment Status</b>	Filter by payment status.
<b>Salesman</b>	Filter by assigned salesman.
<b>Creation Date</b>	Filter by creation date (From / To).
<b>Last Update Date</b>	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
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<b>Type</b>	The collection type — defaults to <code>eo_i_amount</code> .
<b>Amount</b>	The amount to collect — pre-filled from the EOI amount.
<b>Delivery Date</b>	The due/delivery date for this collection.
<b>Paying Options</b>	The payment method used.
<b>Cheque Number</b>	Cheque number, if paying by cheque.
<b>Bank Name</b>	The bank name, if applicable.
<b>Branch Name</b>	The branch name, if applicable.
<b>Account Holder Name</b>	The name on the paying account.
<b>Payment Note</b>	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

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# After Collection

Before	After
EOI Status: <b>Pending</b>	EOI Status: <b>Collected</b>
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).

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# Reserve & Selling Pipeline

## Overview

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

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## 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**.

Unit

3D - 3D

CANCEL

RESERVE

“  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	<input type="checkbox"/>	Pre-filled from the EOI's salesman — can be changed.
Offer	Optional	Any promotional offer linked to the unit.

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

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

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30-30 PRINT MULTIPLE INVOICES TOTAL PAID: 0

Unit Salesman  
Sales Agent,

DISCARD HOLD

Reserve With:  
CREDIT/DEBIT CARD PAYPAL

Sales Man\* SALES AGENT  
 Offer  
 Reservation fees EOI Amount: 10000  
 Discount  
Discount may change automatically when an NPV payment method is selected.  
 Broker Ally Invest  
 Broker Agent Select  
 Contract Date 2026-06-16  
You can leave it empty, and it will use 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
<b>Full Refund</b>	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.
<b>Partial Refund (fees deducted)</b>	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
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<b>Discard Hold</b>	Cancels the unit's hold in the Unit Sales Pipeline only — does not touch the EOI amount itself.
<b>Refund</b>	Returns the collected EOI amount to the client — the correct action when cancelling the process entirely, not just stepping back from one unit.

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