

# 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.

PROJECT (ELITE LIVING) Edit EOI Project  ON [ADD AN UPDATE](#)

|                             |  |
|-----------------------------|--|
| Name*                       | Elite Living   |
| EOI Form                    | <div style="border: 1px solid #ccc; padding: 5px;"><p style="text-align: center;">شهادة رغبة السكن</p><p style="text-align: center;">Expression of Interest Form (EOI) for (-EOI_project-)</p><p style="text-align: center;">الشهادة لبدء رغبة شراء المشروع (-EOI_project-)</p><p style="text-align: center;">-EOI_unit_type-</p><p style="text-align: center;">Semi-Finished <input type="checkbox"/> Fully Finished <input type="checkbox"/></p></div> |
| EOI Value                   | <input type="text"/>   |
| EOI Code                    | <input type="text"/>   |
| EOI Serial Starting From    | 0  |
| EOI Code Type               | A7   |
| EOI Code Type Starting From | 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**.

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