

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, there is a header with '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 search bar and a 'Show 10 entries' dropdown. 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'. The table contains several rows of data, including entries for 'nour dawood', 'hala yaqoub hamdy1', 'kamal ali Mohamed', and 'hala unouh hamdu1'.

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	HISTORY
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 unouh hamdu1	File 1/Julne	Apartment	Admin	Admin	N/A	2024-12-27 19:41:07	100000	2024-12-27 19:41:19	Collected	N/A	HISTORY

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.

Column	Description
Client	The client's name.
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
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Type	The collection type — defaults to <code>eo_i_amount</code> .
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**.

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
Reservation Fees	<input type="checkbox"/>	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.

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

30-30 PRINT MULTIPLE INVOICES TOTAL PAID: 0

Unit Salesman
Sales Agent,

DISCARD HOLD

Reserve With:
CREDIT/DEBIT CARD PAYPAL

Sales Man*

Offer

Reservation fees EOI Amount: 10000

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

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
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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.

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