

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.

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