



# SHE Technologies

A Software, Web Development & Consultant Co.

## Sales Management Module (SAMS)

This Software specially designed / developed to manage the sales, client's data, transfers, payments, receipts, refunds, re-sales, adjustment, transfers & project related reports for **Housing Schemes/ Villas / Shopping Malls Projects.**

- **Unique Registration Number Allocation**
  - Track of Client / File through Reg. No. / Member Ship No.
- **Details of Member / Client & File**
  - Personal Information of Clients / Members
  - Nominee's details / File's Misc Information Capturing
  - Standard / Customized Payment Plan
  - Clients Pictures Attached with File in Software
- **Booking & Payment's Information**
  - Standard / Customized Installment / Other Payments Plan
  - Discount / Rebate on Total Price, Installment & etc
  - Multi Partners Details & Care Alerts
- **Allocation & De-Allocation**
  - Map Entry in System in Digital Form
  - Allocation of Plot / Shop / Office / Apartment / Villa
  - Allocation/De-Allocation History
  - Complete Allot tie Information
  - Plot Available/Booked/Token & Reserved Related Reports.
- **Transfer (File / Plot / Shop)**
  - Transfer History with Customer Picture Recording
  - Transfer, Date, Transfer By, Transfer Charges, Transfer Agent Details
  - Transfer Related Reports
- **Receipts & Payments**
  - Payment Receiving, Payment Modes (Cash, Cheque, PO)
  - Received By, Print by, Receiving Date etc
  - Computerized Receipt Printing
- **Cancellation and Re-Activation**
  - Cancellation due to non payment from client side
  - Activation of File / Customer
- **Refunds & Merging in other File**
  - File/Plot/Shop Refund by Customer
  - Charges Deduction
  - Merging one file payment into another File/Plot/Shop
- **Reports**



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## SAMS in Detail

Functionality of the system (SAMS) is briefly described in the following sections.

### Registration No

- Capturing the complete detail of member for booking
  - o Allocation of unique **Registration No.**
  - o Member Name, Address and Contacts detail
  - o Registration against unique ID (Prefer Computerized NIC)
  - o Personal Information
  - o Nominee Information
  - o Welcome/Congratulation Letter
  - o Picture and other Documents Images
  - o Multiple Analysis Codes
    - Contact Officer
    - Refer By
    - Category A,B & C clients etc.

### Payment Plan

- Multiple payment generation facility
- Attach payment plan against Registration
- Generate payment plan as on the Member request
- Offer Rebate amount for special clients
- Payment plan information
  - o Booking Price
  - o No. of Installments
  - o Installment Due Date
  - o Installment Amount
  - o Installment Received Amount
  - o Receipt No. and Date

### Care Alerts

- Multi care alerts can be assigned against and favor of clients
  - o VIP Client
  - o Reference of Chief Executive.
  - o Make a fraud with our officer last year
- Auto popup while accessing Registration No.

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## Member ID #

- A unique id number (Preferred NIC #) against each Registration.
- Automatically retrieve data against existing members
- Total bookings with complete status of each client.
- 360 Degree view of each client

## Client's Document Control

- Scan and link all related documents with Registration No.
  - o Picture of allot tie
  - o ID Card/Passport
  - o Next of kin picture
  - o Mini Plot map
  - o Correspondence Letter image

## Receipts

- Complete information against each payment made by clients.
  - o Auto Receipt No.
  - o Payment type
    - Installment amount
    - Other amount
  - o Partial/Full payments
  - o Payment through
    - Cash
    - Cheque/PO/DD
      - Drawn On Bank
      - Instrument Number
      - Instrument Date
    - Adjustment
  - o One payment against multiple installments
  - o Receipt Print

## Transfers

- Complete Information of all buyers and Sellers
  - o Name and Address
  - o Transfer Date
  - o Full history/track of previous transfers
  - o Number of installments paid at the time of transfer
  - o Alert at transfer, if Previous installments are not paid
  - o Track of original member/allot tie
  - o De-attach picture at the time of transfer
  - o Daily Transfer Report
  - o Transfer Letters

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## Cancellation

- Mark cancellation with Date and reason
- Re-Activation
- Re-Activation date and reason

## Map

- Full map will be entered into system with following detail
  - Block/Floor No.
  - Plot/Shop/Apartment No.
  - Size/Dimension/Area
  - Khasra No.
  - Plot Type
    - Corner
    - Facing park
    - Main Boulevard
  - Nature
    - Commercial
    - Residential
    - Farm House
  - Status
    - Available
    - Booked
    - Reserve/Token Issue

## Allocation & De-Allocation

- Allotment of plot against registration
- Date of allotment
- Allotment by
- De-Allocation of plot/shop
- New plot can be manually allocated depending upon the availability of plot
- Following information will be capture while allocation and de allocation
  - Current & previous Block, Plot and plot type
  - New allocation date
  - Remarks

## Refunds, Merging & Adjustments

- Files/Plots can be merged into any other files/plots and system keeps record of such refunded, merged and adjusted Files/Shops/Apartments.
  - Registration No.
  - Refunded date and amount
  - Refunded files during a period
  - Charges against each refund
  - Number of paid installments at adjustment time

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## Re-Sale of Files/Shop/Apartments

- System has the functionality of Re-Sale of files/Plots by keeping the following information.
  - o Full history record of Transfers, Purchased and Re-Sale.
  - o Different Re-Sale Price and Payment Schedule.

## Security

- A unique ID for each user and administrator
- Assign menu option according to level of User
- Restrict user to Particular Registration No.
- View only authorized menu options.

## Reports

- A list of reports name is attached at end of this document and user can generate as many reports by using the following system built in utilities
- Reports are on right, System can restrict user to print / save the file.
  - o Sorting
  - o Filtration
  - o Save in Excel and other formats
  - o Squeeze and Expand each report for printing

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## SAMS Reports

### Bookings Reports

- Members Information Detail
- Periodically Booking Detail
- Payment Plans wise Bookings
- Plot Size wise bookings

### Forms

- Members Forms
- Challan Forms

### Installments Reports

- Installments Due Summary/Detail
- Installments Status Frequency Wise
- Installment Fully/Partial Paid
- Installment Paid Range Wise
- Member Wise Installment Status Summary
- Member Wise Defaulters
- Paid Installments and Booking Clients
- Outstanding Installment Summary
- Outstanding and paid Installments

### File/Shop Reports

- Plots/Shops Detail
- Plots/Shops with Amounts Detail
- Block/Floor wise Sale Report
- Block/Floor wise Sale Summary (Marketing)
- Block/Floor Wise Status
- Size Wise Plot Sale Report
- Size Wise Plot Available Report
- Reserve Plots

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