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## CRM CLIENT USER GUIDE

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**HD PROPERTY MANAGEMENT**  
Office 2001, JBC 5, Jumeirah Lake Towers, Dubai, UAE  
+971 4 2580 555  
[www.propertybutlers.ae](http://www.propertybutlers.ae)



Dear Valued Customer,

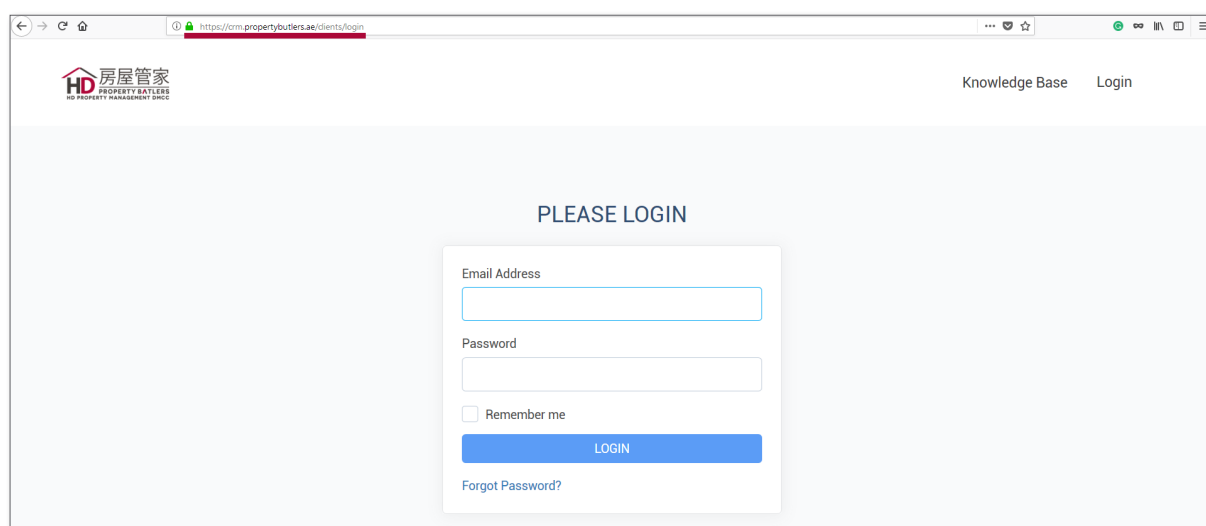
Greetings from HD Property Management DMCC.

Thank you for choosing us as your property manager. We are pleased to inform you that our Client Relationship Management software is now officially released, which will definitely make your investment journey easier. Our goal is to serve you better, and the following guideline is about how to use the CRM.

### LOGIN PAGE:

You can visit the website in 2 ways.

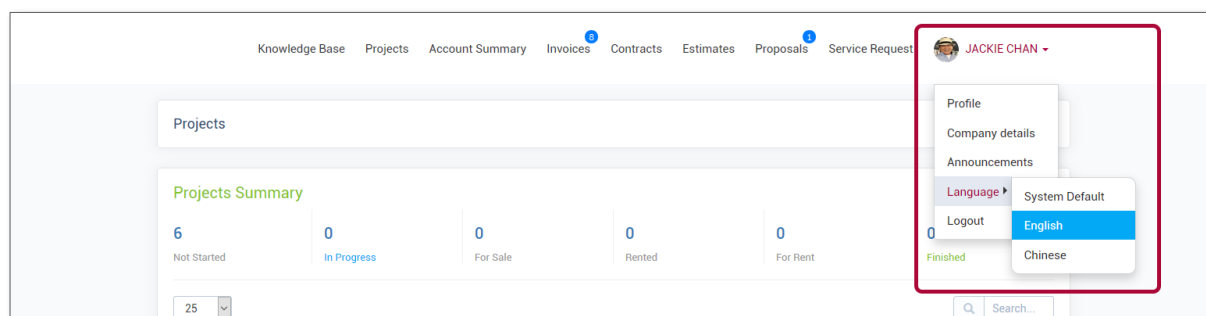
1. [crm.propertybutlers.ae](https://crm.propertybutlers.ae)
2. Or go to our website in [www.propertybutlers.ae](http://www.propertybutlers.ae) then click “client portal”.



### CUSTOMISE YOUR PROFILE:

You can click your NAME on the right top bottom to select your preferred language and complete your profile, and you have the option to change your password in this field.

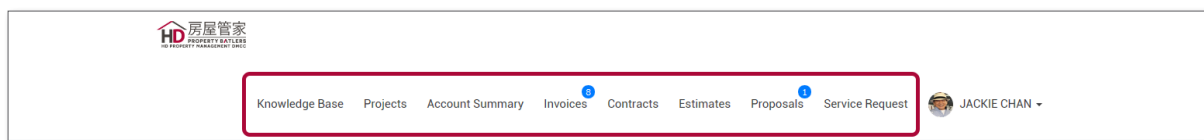
Note: Your First-time login details will be given by our ADMIN, so we recommend you to change your password after login.





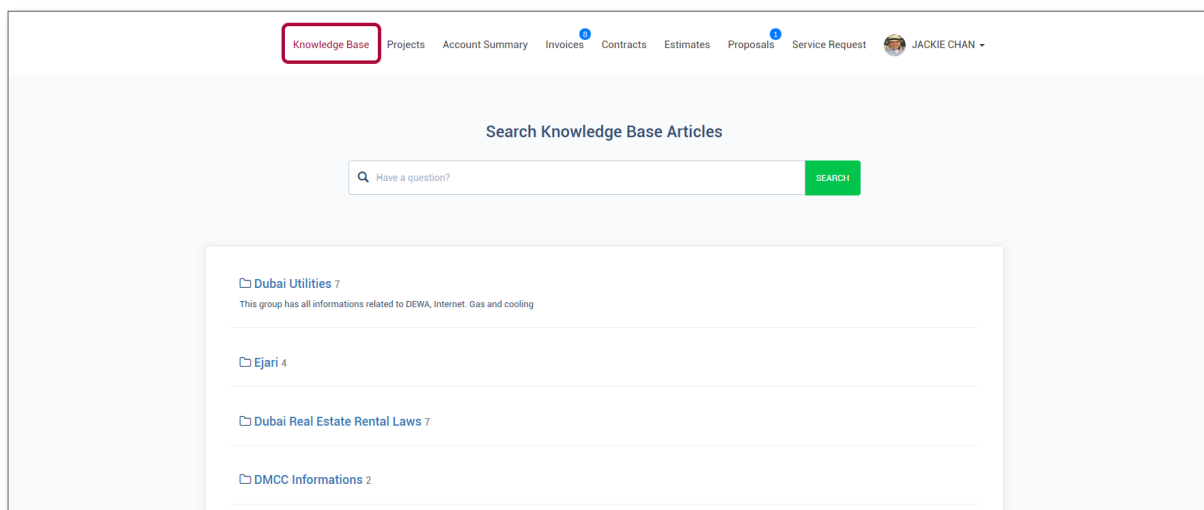
## GENERAL MENU BAR

In the general menu bar the client is able to check the general invoice, contract or proposal, especially for the owner who has multi properties, this panel will show the total figures.



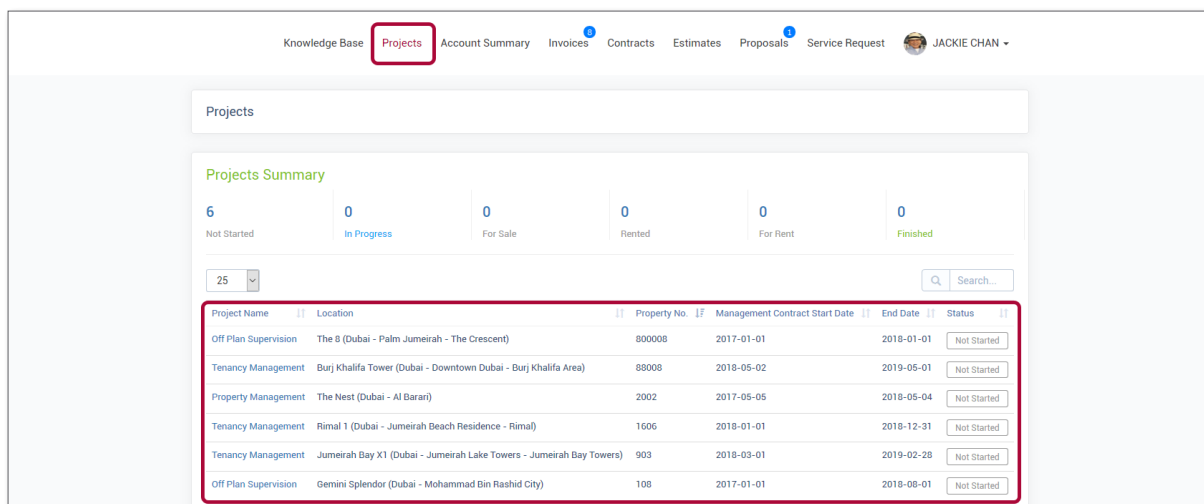
## Knowledge Base

We are collecting all useful information to benefit our client and we keep fill the information of specific knowledge about Dubai real estate here. It is recommended for you to always visit here.




## HOW TO CHECK YOUR PROPERTY

Once you login the CRM, you can visit your property by clicking the “PROJECTS” on the top, where shows all your properties managed by HD.



## PROJECT MENU BAR:

Here is the menu bar where you can track your property finance report, tasks, milestones, and check your documents any time anywhere. We will explain you how each menu works one by one. Stay with us.

[Knowledge Base](#)
[Projects](#)
[Account Summary](#)
[Invoices <sup>4</sup>](#)
[Contracts](#)
[Estimates](#)
[Proposals <sup>1</sup>](#)
[Service Request](#)


**Property Management**

Project Overview
Tasks
Timesheets
Milestones
Folders
Gantt View
Service requests
Activity
Accounts

**OVERVIEW**

0 / 364 DAYS LEFT

0%

0 / 28 OPEN TASKS

100%

**FINANCE REPORT**

Property Value	AED: 12,000,000.00
Annual Rent	AED: 540,000.00
Income	AED: 0.00
Rental Deposit	AED: 20,000.00
Reserve Fund Deposited	AED: 17,000.00
Reserve Fund Remaining	AED: 6,000.00
Utility Deposit	AED: 9,000.00
Billed Expenses	AED: 44,670.00
Unbilled Expenses	AED: 0.00
Total Expenses	AED: 44,670.00
Net Income	AED: 495,330.00
Gross ROI	4.5%
Net ROI	4.13%

**PROJECT MANAGEMENT DETAILS**

Service Type	Property Management
Payment Status	Paid
Status	Not Started
Date Created	2018-05-08
Management Contract Start Date	2017-05-05
Management Contract End Date	2018-05-04
Power Of Attorney	Duplicate Properties
Keys	With Tenant
Access Card	With Tenant

Project Progress

0%

**TENANCY INFO**

Tenant Name	Adele
Tenant Email	adele@yahoo.com
Tenant Phone	+971 55 9898 222
Contract Period To	2017-05-30
Contract Period From	2018-05-29
Annual Rent	540000
Contract Value	540000
Rental Deposit Amount	20000
Mode Of Payment	一张支票 One cheque
Rent Deposit Status	Hold by owner

**BUILDING MANAGEMENT DETAILS**

Building Management Company	
Contact Person	
Contact Email	
Mobile	
Landline	
Annual Service Charge Amount	AED: 0.00
Service Charge Calendar Date	

**UTILITY DETAILS**

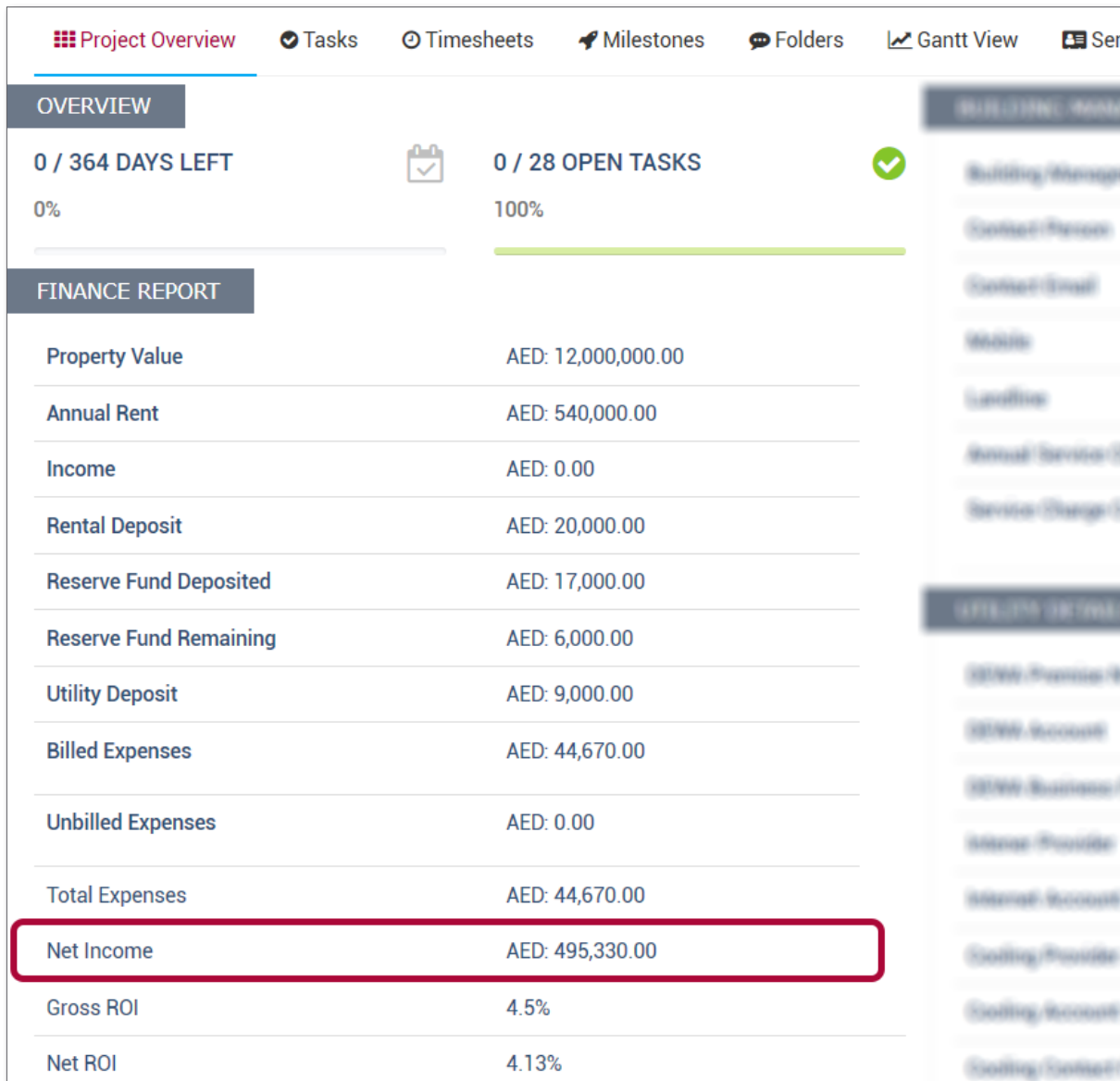
DEWA Premise Number
DEWA Account
DEWA Business Partner No
Intener Provider
Internet Account
Cooling Provider
Cooling Account
Cooling Contact No
Cooling Contact Email

**PROPERTY DETAILS**

Location	The Nest (Dubai - Al Barari)
Property No.	2002
Area Sq.ft	7462
Area sq.m	693
Title Deed Shares	100%
Plot #	11403
Community	AL BARARI
Bedroom	4BR
Bathroom	5
Property Value	11999985
No. Of Parking	4
Developer	AL BARARI
Internet Provider	Du

3

## 1. Project Overview and Finance Report



The screenshot displays a software interface with a navigation bar at the top containing 'Project Overview', 'Tasks', 'Timesheets', 'Milestones', 'Folders', 'Gantt View', and 'Ser'. Below the navigation bar, there are two main sections: 'OVERVIEW' and 'FINANCE REPORT'.

**OVERVIEW**

- 0 / 364 DAYS LEFT (0%)
- 0 / 28 OPEN TASKS (100%)

**FINANCE REPORT**

Property Value	AED: 12,000,000.00
Annual Rent	AED: 540,000.00
Income	AED: 0.00
Rental Deposit	AED: 20,000.00
Reserve Fund Deposited	AED: 17,000.00
Reserve Fund Remaining	AED: 6,000.00
Utility Deposit	AED: 9,000.00
Billed Expenses	AED: 44,670.00
Unbilled Expenses	AED: 0.00
Total Expenses	AED: 44,670.00
<b>Net Income</b>	<b>AED: 495,330.00</b>
Gross ROI	4.5%
Net ROI	4.13%

The overview panel shows you how many days your property management contract left and the status of all the tasks.

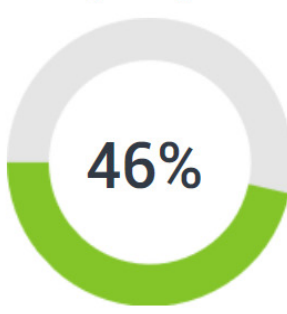
Financial report is a general financial report of your project, which records your yearly rent, incomes, (any income, like any furniture sold etc.) rent security deposit, total maintenance reserve fund deposited and remaining balance, also all your property expenses is recorded in the categories of paid and unpaid. So in this report it shows you how much is your net income during the period.

The calculate of the finance follows the way of:

For property management : annual rent + income – total expenses = net income;

For tenancy management: annual rent + total expenses - income = gross cost.

## 2. Project Management Details

PROJECT MANAGEMENT DETAILS		Project Progress	PROPERTY DETAILS	
Service Type	Property Management		 <p>46%</p>	Location
Payment Status	Paid	Property No.		
Status	Not Started	Area Sq Ft		
Date Created	2018-05-08	Area sq m		
Management Contract Start Date	2017-05-05	Title Deed Status		
Management Contract End Date	2018-05-04	Plot #		
Power Of Attorney	Duplicate Properties	Community		
Keys	With Tenant	Bedroom		
Access Card	With Tenant	Bathroom		
		Property Value		

In this panel you will easily find out your property status.(in progress, rented or for rent) It reminds you when your management contract will be expired and also shows the status of the KEYS and ACCESS CARD.

## 3. Tenancy Information

TENANCY INFO	
Tenant Name	Adele
Tenant Email	adele@yahoo.com
Tenant Phone	+971 55 9898 222
Contract Period To	2017-05-30
Contract Period From	2018-05-29
Annual Rent	540000
Contract Value	540000
Rental Deposit Amount	20000
Mode Of Payment	一张支票 One cheque
Rent Deposit Status	Hold by owner

In this panel you will find out the major information of your tenancy agreement.

#### 4. Property Details

PROPERTY DETAILS	
Location	The Nest (Dubai - Al Barari)
Property No.	2002
Area Sq.ft	7462
Area sq.m	693
Title Deed Shares	100%
Plot #	11403
Community	AL BARARI
Bedroom	4BR
Bathroom	5
Property Value	11999985
No. Of Parking	4
Developer	AL BARARI

In this panel, you can instantly check your property details.

#### 5. Utility Details

UTILITY DETAILS
DEWA Premise Number
DEWA Account
DEWA Business Partner No
Intener Provider
Internet Account
Cooling Provider
Cooling Account
Cooling Contact No
Cooling Contact Email

In case you forget your DEWA premises number, this panel will link to our Chinese web portals in the future. If the property is vacant, it can send details to the linked portals and generate listing for rent or for sale.

## 6. Building Management Details

BUILDING MANAGEMENT DETAILS

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**Building Management Company**

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**Contact Person**

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**Contact Email**

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**Mobile**

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**Landline**

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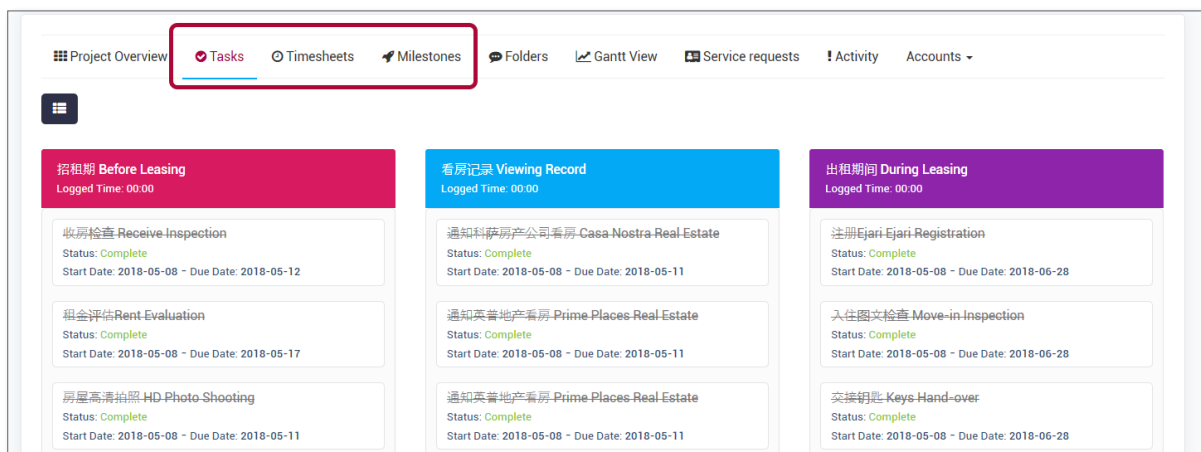
**Annual Service Charge Amount**

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**Service Charge Calendar Date**

In this panel you can find the details of the building management.

## TASKS-TIMESHEETS-MILESTONES



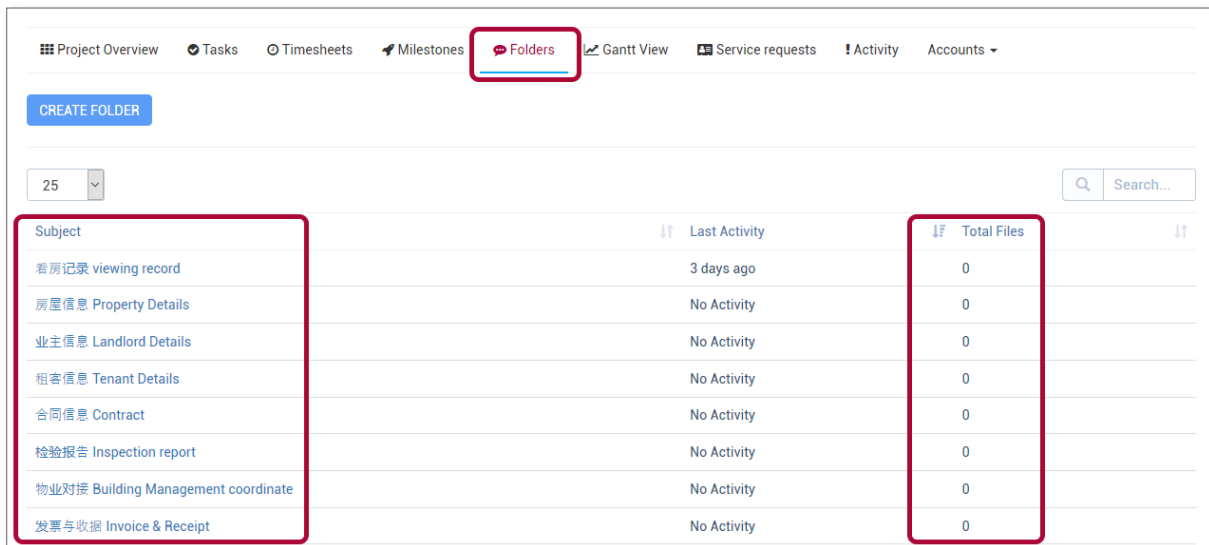
The screenshot shows a software interface with a navigation bar at the top. The 'Tasks' tab is selected and highlighted with a red box. Below the navigation bar, there are three columns of task cards. The first column is '招租期 Before Leasing' (pink), the second is '看房记录 Viewing Record' (blue), and the third is '出租期间 During Leasing' (purple). Each card lists tasks with their status (Complete) and dates.

招租期 Before Leasing	看房记录 Viewing Record	出租期间 During Leasing
<b>收房检查 Receive Inspection</b> Status: Complete Start Date: 2018-05-08 - Due Date: 2018-05-12	<b>通知科萨房产公司看房 Caea-Nostra-Real-Estate</b> Status: Complete Start Date: 2018-05-08 - Due Date: 2018-05-11	<b>注册Ejari-Ejari-Registration</b> Status: Complete Start Date: 2018-05-08 - Due Date: 2018-06-28
<b>租金评估 Rent-Evaluation</b> Status: Complete Start Date: 2018-05-08 - Due Date: 2018-05-17	<b>通知英普地产看房 Prime-Places-Real-Estate</b> Status: Complete Start Date: 2018-05-08 - Due Date: 2018-05-11	<b>入住图文检查 Move-in-Inspection</b> Status: Complete Start Date: 2018-05-08 - Due Date: 2018-06-28
<b>房屋高清拍照 HD-Photo-Shooting</b> Status: Complete Start Date: 2018-05-08 - Due Date: 2018-05-11	<b>通知英普地产看房 Prime-Places-Real-Estate</b> Status: Complete Start Date: 2018-05-08 - Due Date: 2018-05-11	<b>交接钥匙 Keys-Hand-over</b> Status: Complete Start Date: 2018-05-08 - Due Date: 2018-06-28

Task, milestone and timesheet are all related. You can click the tasks to check the current status of your property, which will show as complete, in progress or not started tasks. Some are fixed task such as move-in inspection, some tasks are depending on actual result such as viewing record or maintenance.



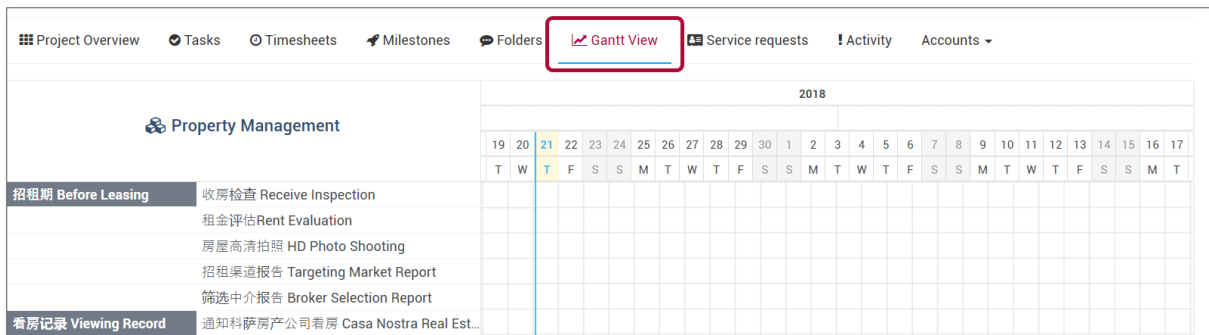
## FOLDERS



Subject	Last Activity	Total Files
看房记录 viewing record	3 days ago	0
房屋信息 Property Details	No Activity	0
业主信息 Landlord Details	No Activity	0
租客信息 Tenant Details	No Activity	0
合同信息 Contract	No Activity	0
检验报告 Inspection report	No Activity	0
物业对接 Building Management coordinate	No Activity	0
发票与收据 Invoice & Receipt	No Activity	0

This panel is very important, regarding our service, because we back up all the related documents for your property, where you can visit any time to check your title deed, inspection report, all third parties receipt etc. You will never worry about missing any documents any more.

## GANTT VIEW



		2018																												
		19	20	21	22	23	24	25	26	27	28	29	30	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17
		T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T
<b>招租期 Before Leasing</b>	收房检查 Receive Inspection																													
	租金评估 Rent Evaluation																													
	房屋高清拍照 HD Photo Shooting																													
	招租渠道报告 Targeting Market Report																													
	筛选中介报告 Broker Selection Report																													
<b>看房记录 Viewing Record</b>	通知科萨房产公司看房 Casa Nostra Real Est...																													

Gantt view, similar to task calendar, is easier for client to view the exactly dates and tasks.

## SERVICE REQUESTS

The screenshot shows the 'Property Management' dashboard. At the top, there is a navigation bar with options: Project Overview, Tasks, Timesheets, Milestones, Folders, Gantt View, **Service requests** (highlighted with a red box), Activity, and Accounts. Below the navigation bar, there is a button labeled 'OPEN NEW REQUEST' (highlighted with a red box). A dropdown menu shows '25'. To the right is a search bar with 'Search...'. Below this is a table of requests:

Request #	Subject	Department	Project	Service	Priority	Status	Last Reply
#9	Maintenance AC 维修空调	INSPECTION	Property management		High	Open	No Reply

At the bottom, it says 'Showing 1 to 1 of 1 entries' and has 'Previous', '1', and 'Next' navigation buttons.

In this panel you can request directly to our property manager for this specific property.

The screenshot shows the 'OPEN NEW REQUEST' form. At the top, there is a navigation bar with options: Knowledge Base, Projects, Account Summary, Invoices (3), Contracts, Estimates, Proposals (1), Service Request, and JACKIE CHAN. The form has the following fields:

- Subject:** Register DEWA Account (highlighted with a red box)
- Project:** Property management
- Department:** ADMINISTRATION
- Priority:** High
- Ticket Body:** Please help me to register my DEWA account. Please let me know how long it will take and how much will it cost? (highlighted with a red box)
- Attachments:** Browse... No file selected. (with a green plus icon)

At the bottom, there is a 'SAVE' button.

Just write down your request content and send, isn't it easy?

## ACCOUNTS: INVOICES & EXPENSES

Property Management

Project Overview Tasks Timesheets Milestones Folders Gantt View Service requests Activity **Accounts**

25

Invoice #	Subject	Project	Date	Amount	Status
INV-000180	Receipt of EMPOWER Activation 空调激活费收据	Property management	2018-03-01	3,325.00	PAID
INV-000145	Property Management Fees 现房托管费	Property management	2018-05-08	28,350.00	PAID
INV-000158	Property management fees	Property management	2018-05-23 - 2018-06-22	5,000.00	PAID
INV-000182	Plumbing Maintenance 下水管道维修	Property management	2018-04-11 - 2018-04-15	850.00	OVERDUE
INV-000179	Parking Access Card 停车卡	Property management	2018-03-03 - 2018-03-07	550.00	PAID
INV-000184	NBD Bank Card Application 代办NBD银行卡	Property management	2018-05-05 - 2018-05-15	2,000.00	PAID
INV-000181	Maintenance and Cleaning 入住前维修汇总	Property management	2018-06-20 - 2018-07-20	8,900.00	PAID
INV-000183	Cleaning service 房屋清洁服务	Property management	2018-05-04 - 2018-05-10	550.00	OVERDUE
INV-000177	Bulbs Maintenance 换灯管修墙洞	Property management	2018-04-15 - 2018-04-23	677.25	PAID
INV-000178	AC Maintenance 空调管道维修	Property management	2018-06-20 - 2018-07-20	850.00	PAID

Showing 1 to 10 of 10 entries

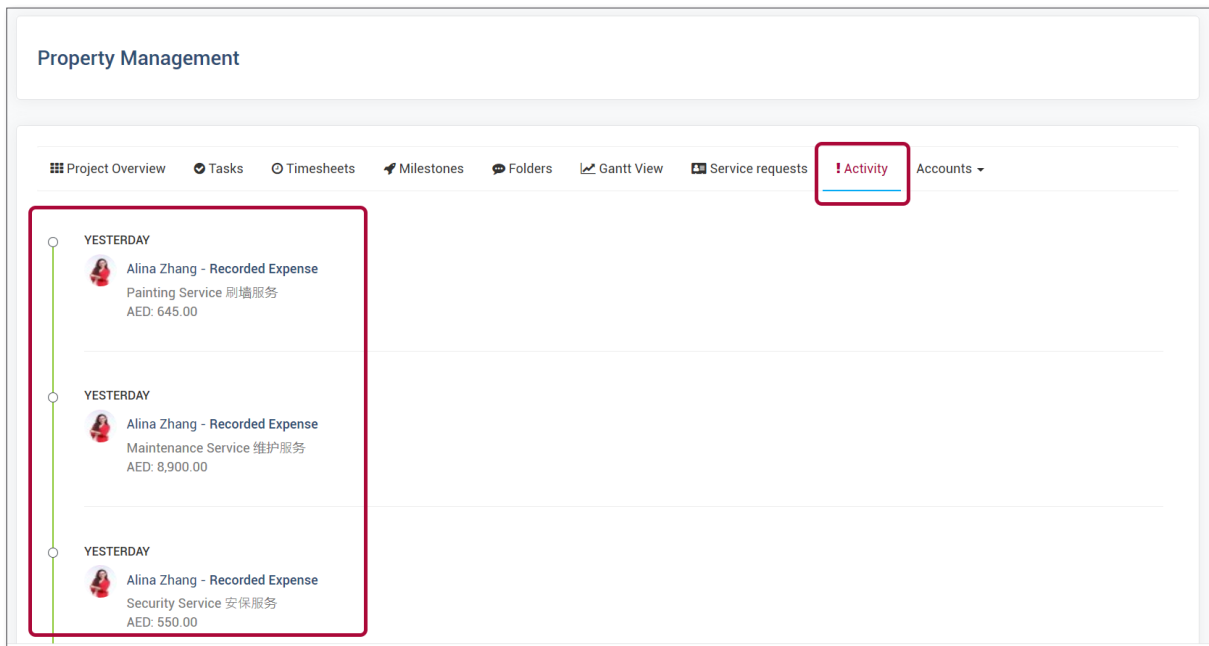
In INVOICE & EXPENSES, you are able to check the paid and unpaid invoices and all the expenses, which are recorded.

Project Overview Tasks Timesheets Milestones Folders Gantt View Service requests Activity **Accounts**

25

Category	Amount	Name	Expense Receipt	Date	Invoice	Payment Mode
Maintenance Service 维护服务	8900.00	Maintenance and Cleaning 入住前维修汇总	Totle Maintenance Fees before Move in 入住前维修汇总.pdf	2018-03-08	INV-000181	Cheque
Painting Service 刷墙服务	645.00	Bulb Maintenance 换灯管修墙洞	Receipt voucher TPC 维修收据.pdf	2018-04-05	INV-000177	Cheque
Maintenance Service 维护服务	850.00	Plumbing Maintenance 下水管道维修	Receipt of Plumbing Maintenance 下水管道维修收据.pdf	2018-04-11	INV-000182	Bank Transfer
Open Bank Account 银行开户	2000.00	NBD Bank Card Application 代办NBD银行卡	Receipt of NBD Bank Card Application NBD 银行卡代办收据.pdf	2018-05-05	INV-000184	Cash
Air Conditon 空调维护	3325.00	Receipt of EMPOWER Activation 空调激活费收据	Receipt of EMPOWER Activation 空调激活费收据.pdf	2018-03-01	INV-000180	Bank Transfer
Air Conditon 空调维护	850.00	AC Maintenance 空调管道维修	Receipt of AC plubing maintenance 空调管道维修发票.pdf	2018-04-11	INV-000178	Bank Transfer
Property Management 房屋托管	27000.00	Property Management Fees 现房托管费	Property Management Receipt 现房托管费收据.pdf	2018-05-08	INV-000145	Bank Transfer
Security Service 安保服务	550.00	Parking Access Card Application 申请停车卡	Parking Access Card Receipt 停车卡收据.pdf	2018-04-08	INV-000179	Cash
Cleaning Service 清洁服务	550.00	Cleaning service 房屋清洁服务	Cleaning service 房屋清洁服务.pdf	2018-05-04	INV-000183	Cash

## ACTIVITY



**Property Management**

Project Overview Tasks Timesheets Milestones Folders Gantt View Service requests **Activity** Accounts ▾

**YESTERDAY**

- Alina Zhang - Recorded Expense**  
Painting Service 刷墙服务  
AED: 645.00
- YESTERDAY**
- Alina Zhang - Recorded Expense**  
Maintenance Service 维护服务  
AED: 8,900.00
- YESTERDAY**
- Alina Zhang - Recorded Expense**  
Security Service 安保服务  
AED: 550.00

Activity shows all works have happened for this project.

For any questions, kindly contact our admin to assist you.  
We are looking forward to hearing feedback and suggestion from you!  
Thank you ! 谢谢