



# SHE Technologies

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## 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.

### 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.

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- Picture of allot tie
- ID Card/Passport
- Next of kin picture
- Mini Plot map
- Correspondence Letter image

## Receipts

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

## Transfers

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

## 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



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- 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
  - o Current & previous Block, Plot and plot type
  - o New allocation date
  - o 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.
  - o Registration No.
  - o Refunded date and amount
  - o Refunded files during a period
  - o Charges against each refund
  - o Number of paid installments at adjustment time

### 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.

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### 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



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- 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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## SAMS Adds-On

- **Late Payment**
- **Agent Commission**
- **Transfer Biometric**
- **SMS Integrated**
- **PDC (Cheques)**
- **Balloting**
- **Token/Reservation**
- **Recovery/Follow-up**
- **Auto Letters**
- **WAN-DEV**

