



Deal Workflow Management just got easier with the new PropSpace Deal Wizard

PropSpace is delighted to introduce its new [Deal Wizard](#). Real Estate companies can now seamlessly record their transactions, generate receipts and invoices, record documents and follow predefined checklists to ensure smooth and efficient back-office deal workflow management.

Deal wizard : Core details

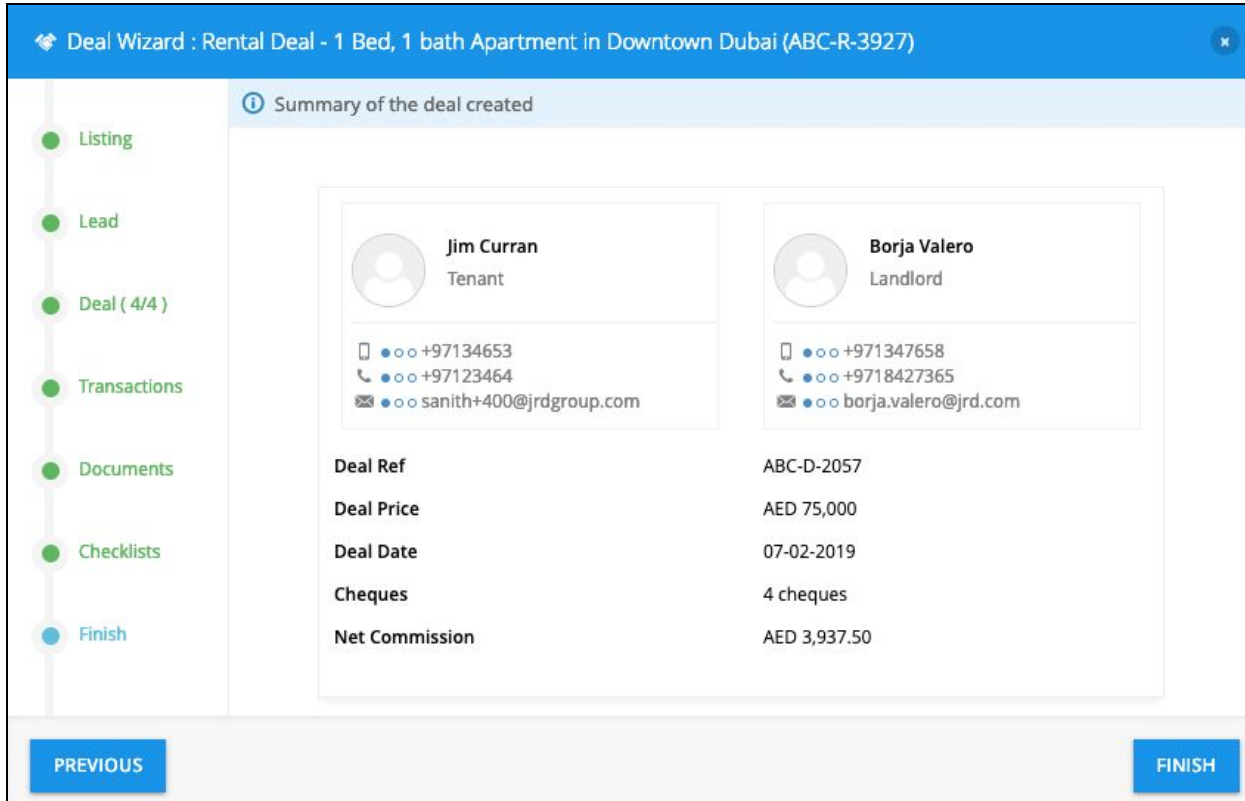
Deal is for Rentals Sales

Deal Status Sub Status

- Is there a lead created for this deal?
- Is commission shared with other agents?
- Is commission shared with external agents (External Referral)? [?]
- Does VAT Apply to the property transaction? [?]
- Would you like to add transactions to the accounts screen?
- Would you like to generate documents? [View documents](#)
- Complete your company's deal checklist?

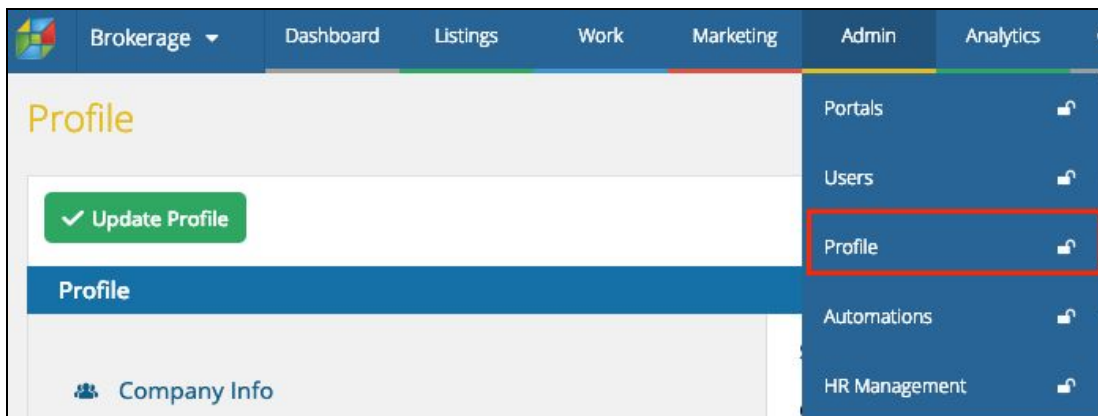
[START WIZARD >](#)

The Deal Wizard allows Real Estate companies and their agents to create and manage sales and rentals deals via a step-by-step and easy to follow predefined checklist.

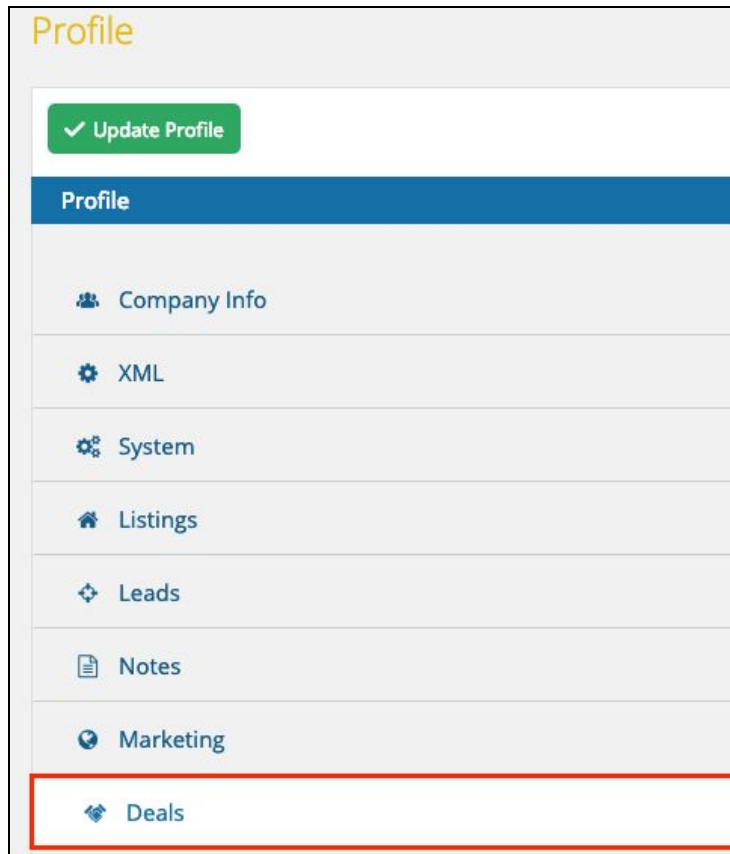


How to activate the Deal Wizard for your company:

1. Login to PropSpace as a **Manager** user.
2. Navigate to the Profile screen from the Admin Tab.



3. Select Deals from the Navigation tab



4. Set the Deal Wizard Settings:

Deal Wizard Settings	Default checked?	Is mandatory?
Is there a lead created for this deal?	<input type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No
Is commission shared with other agents?	<input type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No
Is commission shared with external agents (External Referral)?	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No
Does VAT Apply to the property transaction?	<input type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No
Would you like to add transactions to the accounts screen?	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No
	Access to <input type="text" value="All users"/>	
Would you like to generate documents?	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No
Complete your company's deal checklist?	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No

In the above screenshot, you can see two headers Default checked and Is mandatory.

Default Checked:

Yes: If this option is checked, then the user will see the setting checked by default in the Deal Wizard.

Would you like to add transactions to the accounts screen?

No: If this option is checked, then the user will not see the setting checked by default in the Deal Wizard.

Is commission shared with external agents (External Referral)?

Is Mandatory:

Yes: If this option is checked, then the setting will always be selected in the Deals Wizard and hence the default checked option will be set to Yes. Also, the selected setting will be greyed out and the user will not be able to uncheck it on the Deals Wizard.

Is there a lead created for this deal?

No: If this option is checked, then the setting will not be checked in the Deals Wizard. But, the user still can make it default checked by selecting Yes or No.

Is commission shared with external agents (External Referral)?

Yes

No

Yes

No



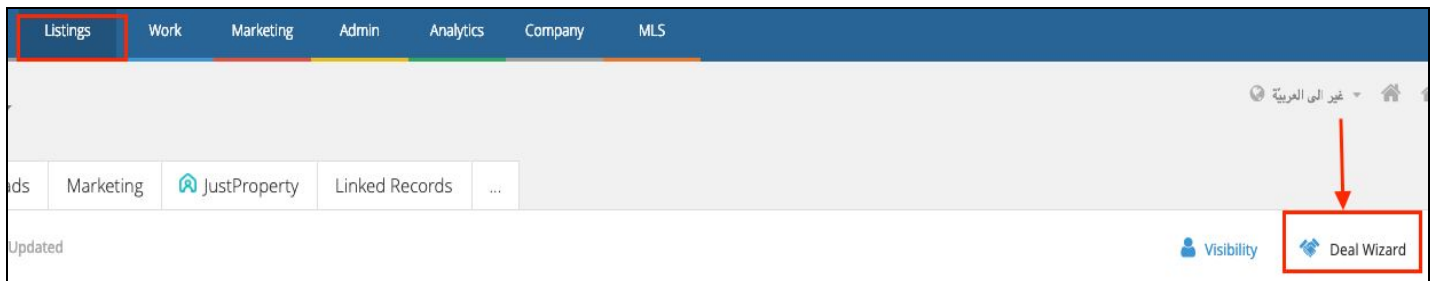
Is commission shared with external agents (External Referral)?

How to use the Deal Wizard once the initial settings have been saved:

The Deal Wizard can be accessed from three different screens within PropSpace.

The following screens show the Deal Wizard shortcut link:

- Listings
- Leads
- Deals



Example: Creating a Rental Deal using the Deal Wizard from the Rental Listings Screen:

1. Login to PropSpace and Navigate to the Listings > Rentals Page.
2. Select the listing you would like to create a deal for.
3. Click on Deals Wizard link at the top right of the screen.
4. The Deals Wizard will be opened with the default settings pre-populated as per the master company profile settings set by the company Manager.
5. If the user opts to create a Deal without any of the options from the below section then the user can simply uncheck the option.
6. The user should note that if any of the non-mandatory options is unchecked then the same option will not be displayed after starting the wizard.

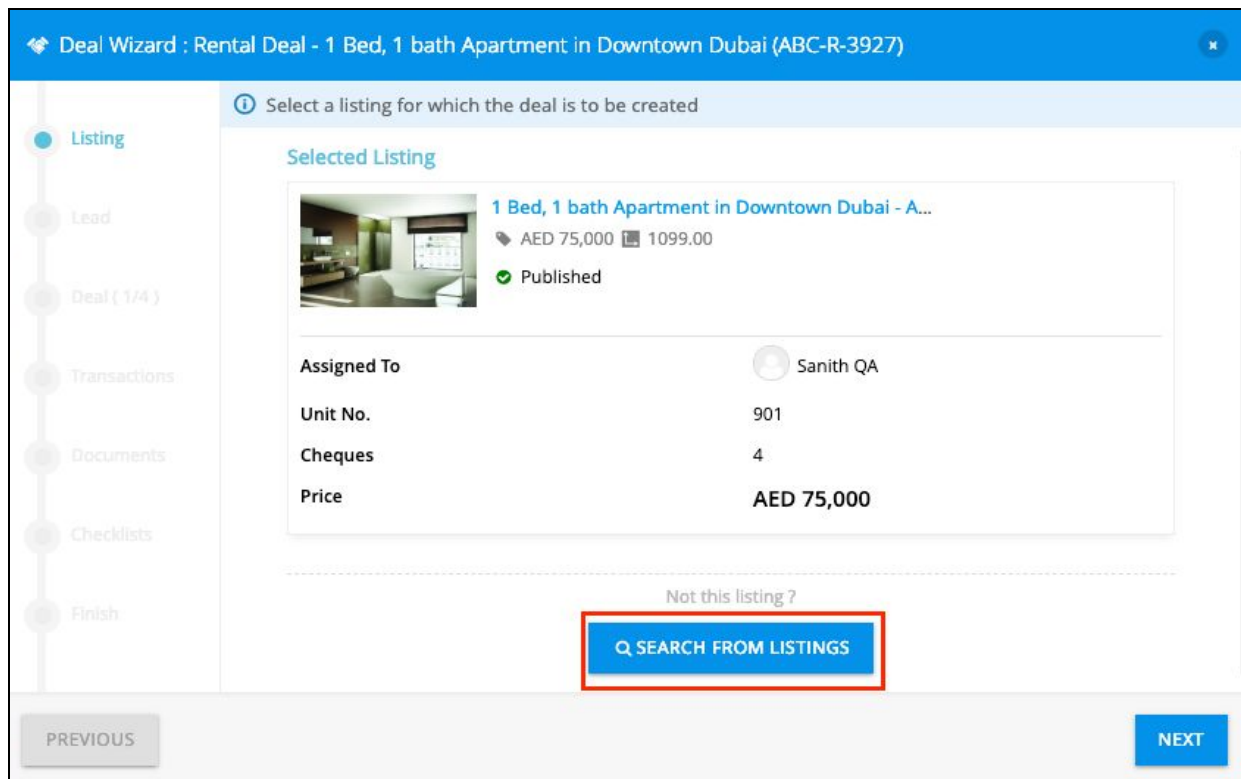
A screenshot of the 'Deal wizard : Core details' form. The form has a blue header with the title 'Deal wizard : Core details' and a close button. Below the header, there are several sections:

- Deal is for:** Radio buttons for 'Rentals' (selected) and 'Sales'.
- Deal Status:** A dropdown menu with 'Open' selected.
- Sub Status:** A dropdown menu with 'Pending Completion' selected.
- A list of checkboxes with labels:
 - Is there a lead created for this deal?
 - Is commission shared with other agents?
 - Is commission shared with external agents (External Referral)?
 - Does VAT Apply to the property transaction?
 - Would you like to add transactions to the accounts screen?
 - Would you like to generate documents? [View documents](#)
 - Complete your company's deal checklist?

At the bottom of the form, there is a blue button labeled 'START WIZARD' with a right-pointing arrow.

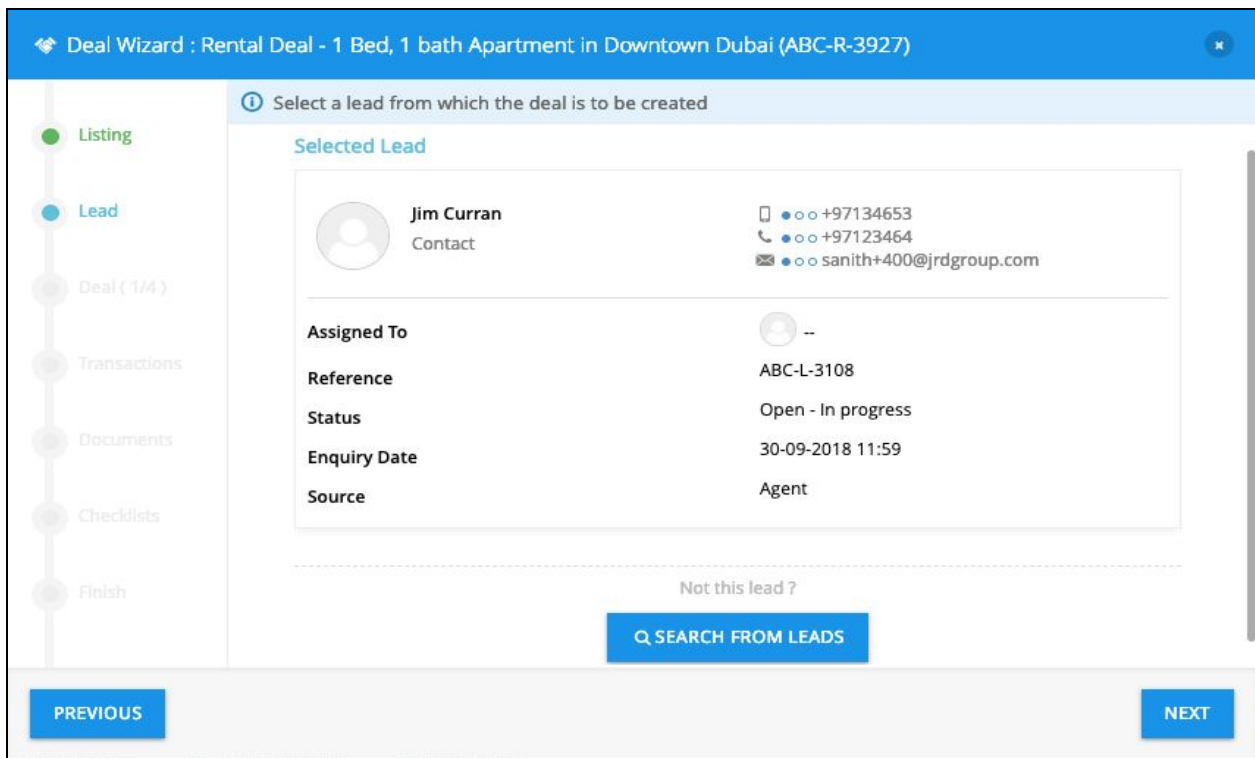
6. Click on Start Wizard button at the bottom of the wizard.

7. The Deals Wizard will display the details of the selected property.

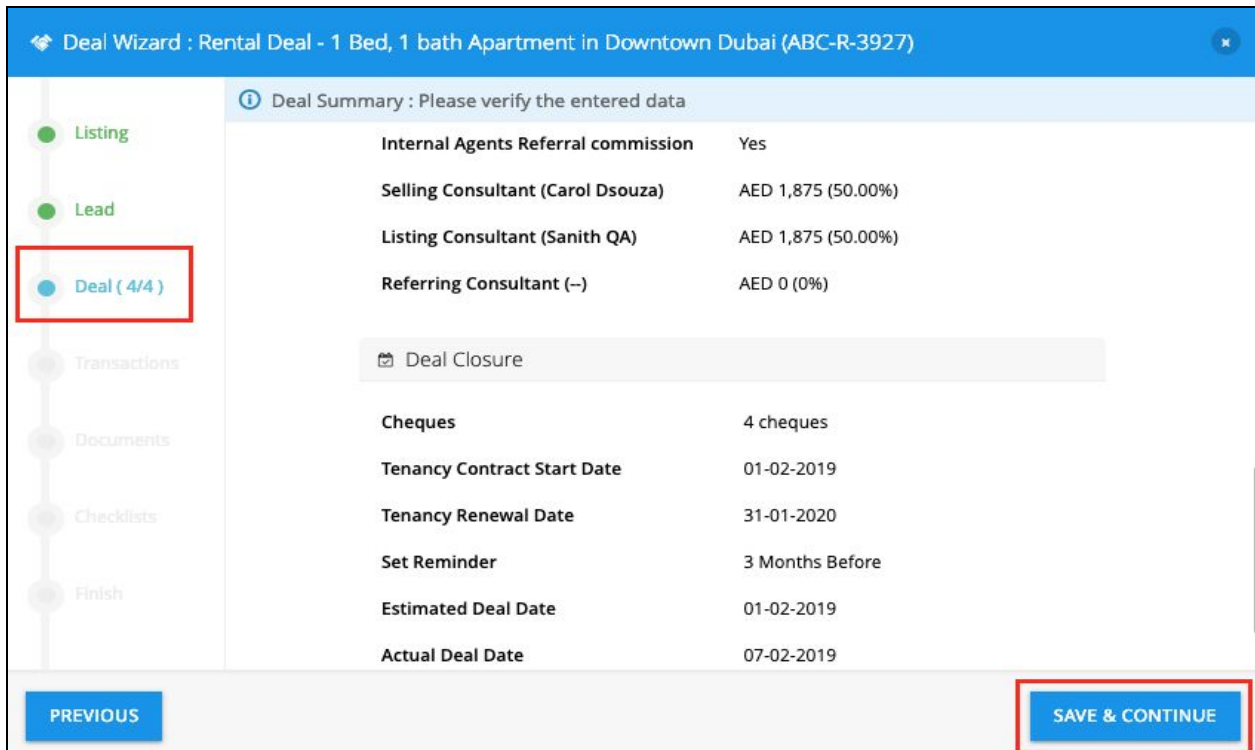


8. After selecting the listing, the user should click on Next button.

9. The lead associated with the deal should be selected next.



10. The user should review the Deals section in the wizard and Click on Save and Continue button.



11. Next section is about the transaction. This is where the draft entry of the commission transaction is displayed. The user can save it directly or edit the transaction before saving it.

Deal Wizard : Rental Deal - 1 Bed, 1 bath Apartment in Downtown Dubai (ABC-R-3927)

Manage financial transactions for the Deal, This will be added to Accounts as well

+ Add Invoice Receipt Acknowledgement Receipt

Ref	Payer	Status	Amount	VAT	Total	Actions	
<input checked="" type="checkbox"/>	ABC-A-1045	Jim Curran	Pending	3,750	187.50	3,937.50 CR	

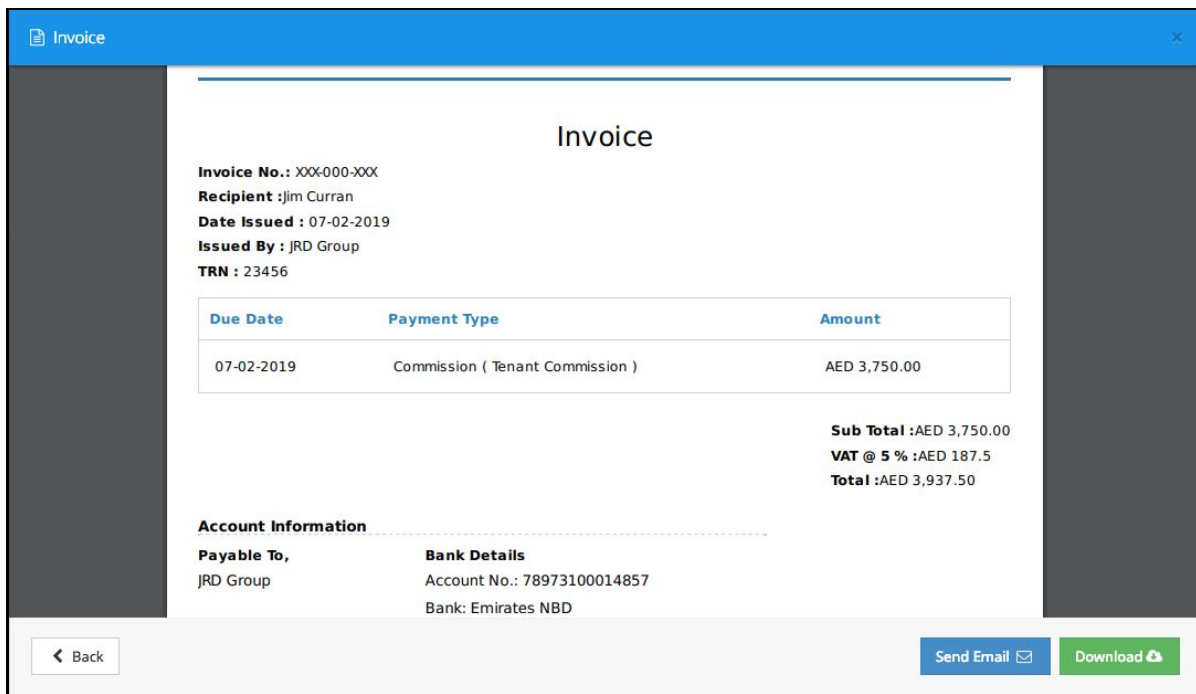
Total 1 transaction

Sub Total Credit	AED 3,750 CR	Total Credit	AED 3,937.50 CR
Total VAT Credit	AED 187.50 CR	Total Debit	AED 0 DR
Total		AED 3,937.50 CR	

PREVIOUS NEXT

As you can also see that after saving the transaction, the details can be used to generate an Invoice, Receipt and the Acknowledgement Receipt.

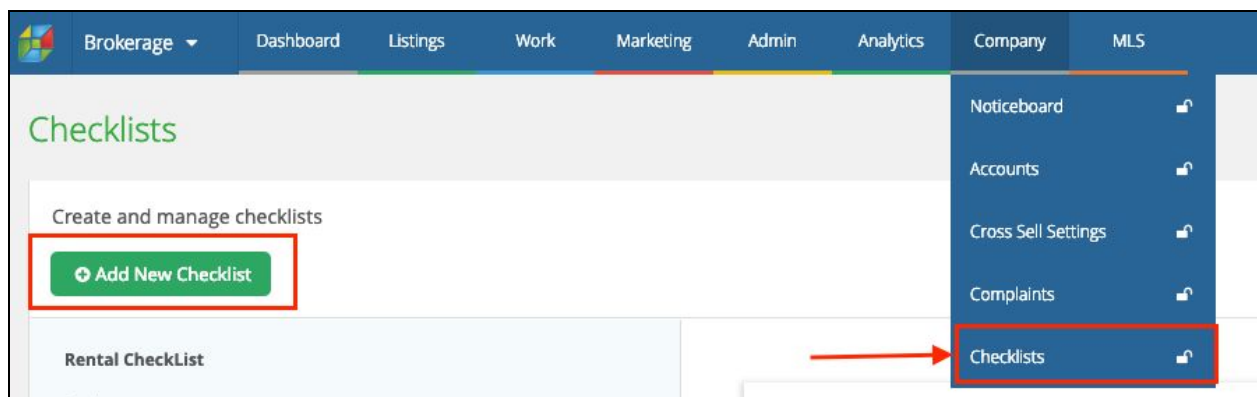
- Select the desired transaction by selecting the check box to the left of each transaction and then click on Invoice or Acknowledgement Receipt.
- Next, you will observe the Generate Invoice or Acknowledgement Receipt pre-form.
- Fill the date, Issued By and the addendum.
- If you wish to include bank account details, then select the check box at the bottom of the screen.
- Now, you will see the preview screen of the Invoice or Acknowledgement Receipt. If the details are correct then you can send the copy of the same as Email or download a copy.
- If you choose Send Email, then preview the Email To text fields, subject and the message field before finally sending an email.



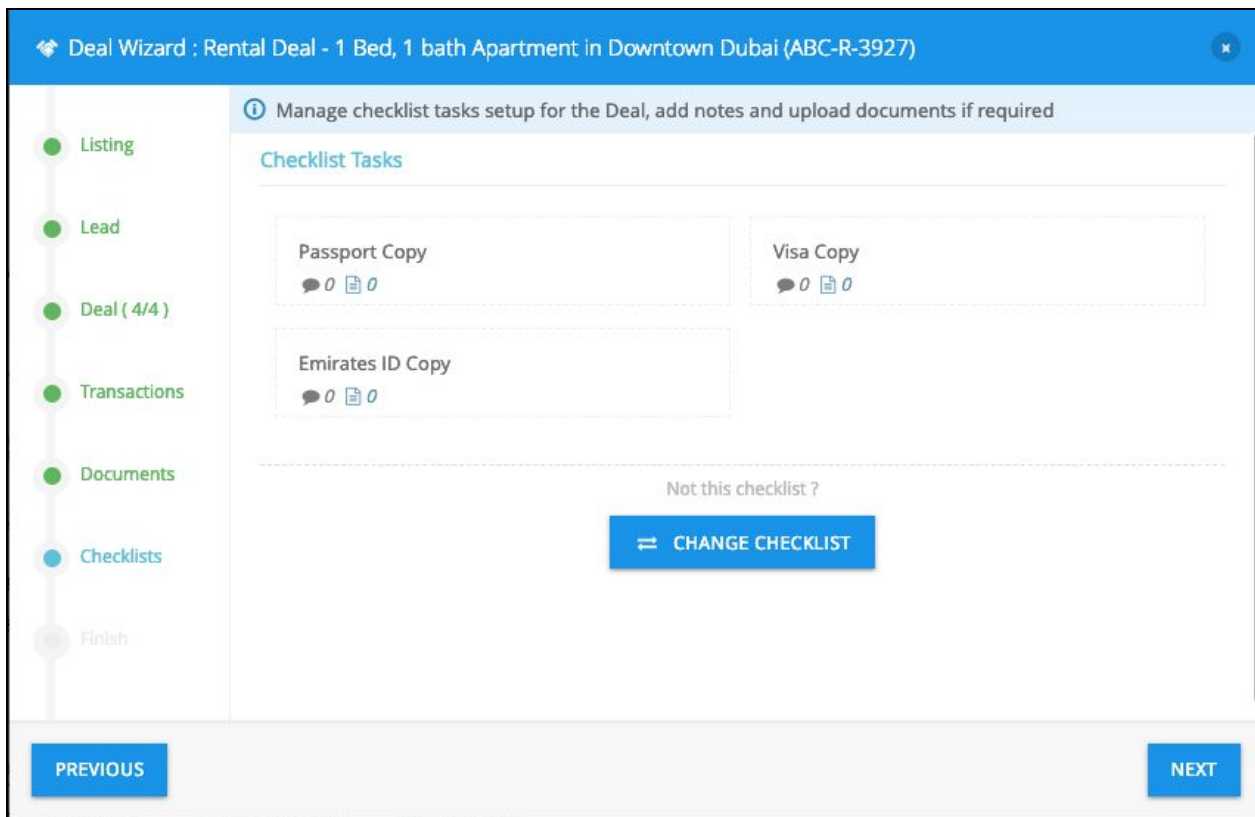
12. Click Next to move to the Documents section of the Deal Wizard. Here, you can generate your company’s important documents which have already been uploaded into PropSpace by your company Admins.

13. Click Next to move to Checklists.

To get the default checklist, the PropSpace Manager/Admin user needs to add the predefined Checklist into PropSpace by navigating to the Checklists page under Company Tab and click on Add New Checklist.

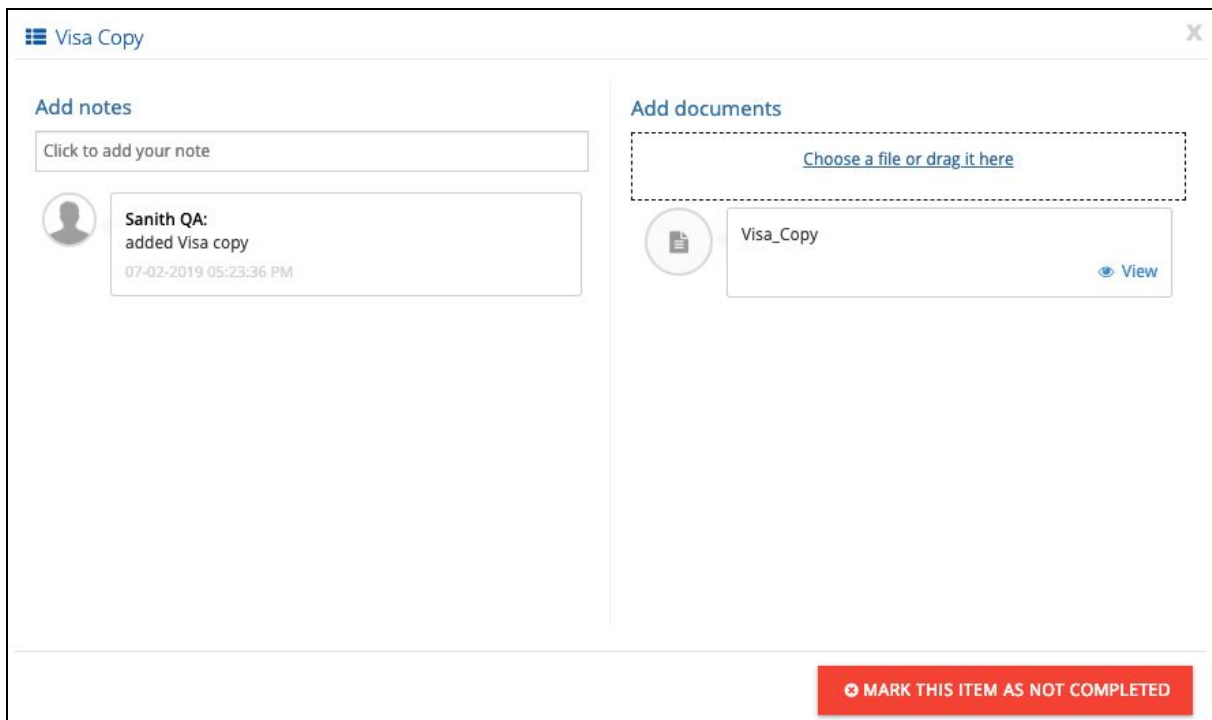


After adding the checklist, the same checklist items will be displayed in your Deal Wizard checklists section.



If your company has more than single checklist, simply click on Change Checklist button and select the desired Checklist.

After selecting the desired Checklist, click on each checklist item and attach the relevant document to mark it as completed.



- Click on the Next button after completing the checklist.
- The final section is where you will see the formal details of the Deal with the Deal Ref No. and a few more details.

Deal Wizard : Rental Deal - 1 Bed, 1 bath Apartment in Downtown Dubai (ABC-R-3927)

Summary of the deal created

Melroy Dsouza Tenant	Borja Valero Landlord
+971565390166111111	+971347658
+971565390166111222	+9718427365
wamique+testdigitlimit1@jrdgroup.com	borja.valero@jrd.com

Deal Ref	ABC-D-2060
Deal Price	AED 75,000
Deal Date	07-02-2019
Cheques	4 cheques
Net Commission	AED 3,937.50

PREVIOUS FINISH

- Click on Finish button to complete the Deal Wizard. You will see the Success Message.



- To view the newly created Deal from the Listings Page, click on Deal Wizard again from the listings page and click on the deal link created for this property.

Note: In the example below, 2 deals have been created for this property (for example the same property can be sold or rented multiple times).

The image shows two screenshots of the PropSpace Deals interface. The top screenshot shows a blue header with a document icon and the word 'Deals', a blue '+ CREATE DEAL' button, and a red-bordered box containing the text 'View 2 deals already created for this property' with a red arrow pointing to it from the left. The bottom screenshot shows the same interface but with two deal cards listed below the '+ CREATE DEAL' button. Each card features a handshake icon, the title 'Rental Transaction - Borja Valero', a reference ID (ABC-D-2060 and ABC-D-2057), a price of AED 75,000, a date of 07-02-2019, and a user name (Tauseef Riaz and Carol Dsouza). Each card also has a 'View' link and a status indicator 'Open - Pending Completion'.

If you require any assistance with using the PropSpace Deal Wizard then please contact our support team any time Sunday to Thursday from 9am to 6pm (UAE time) on:

Tel: +971 4 420 1044
Email: support@prospace.com