

Commercial Proposal

Optima CRM
(Standard Edition)

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UNLOCK THE FUTURE OF
PROPERTY MANAGEMENT
WITH **OPTIMA CRM**

Simplify

Organize

Succeed!



Powered By



OPTIMA VENTURES

Executive Summary

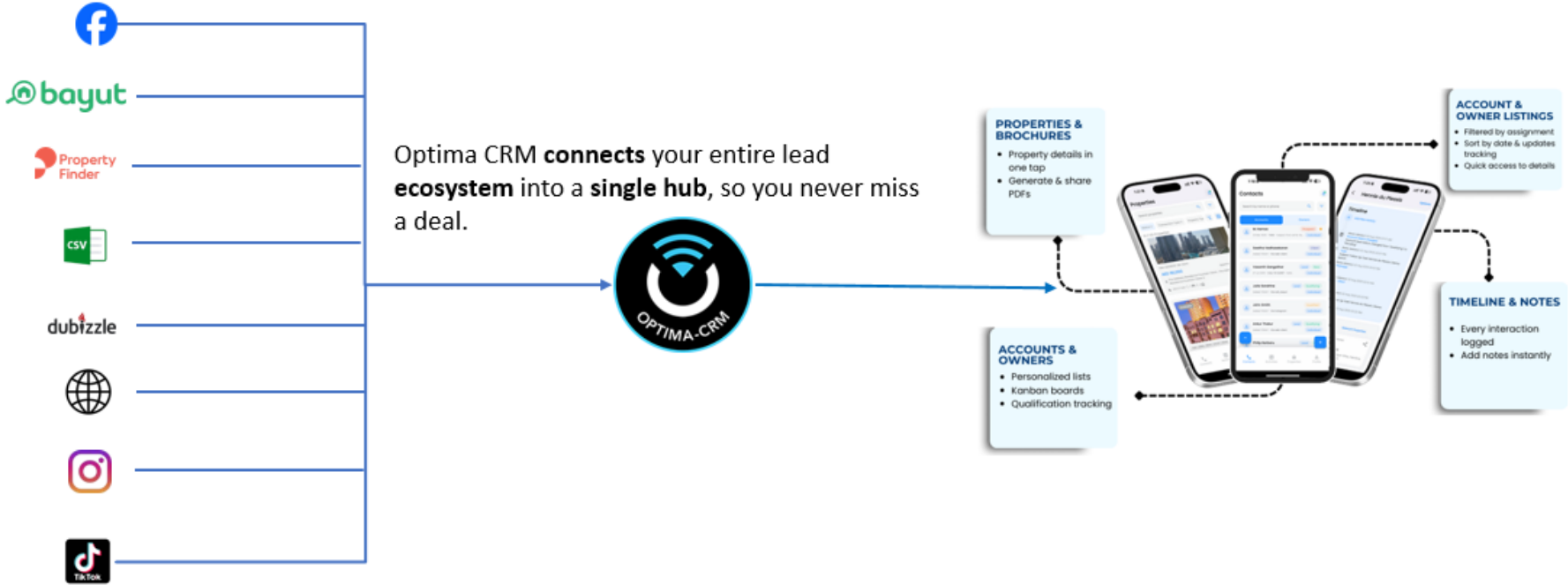
Optima CRM is a modern, easy-to-use, and powerful customer relationship management platform designed specifically for real estate agencies. This proposal presents the **Standard Edition**, which focuses on **Lead Management** and **Listing Management** — the essential tools required to manage inquiries efficiently, track listings, and empower your agents to close deals faster.

About Optima CRM

At Optima Ventures, we understand the challenges real estate agencies face in managing client interactions and property listings across multiple platforms. Optima CRM was designed to simplify these challenges by:

- Centralizing all leads and property listings in one platform.
- Automating repetitive tasks such as lead assignment and portal integrations.
- Improving agent productivity with structured workflows.
- Providing visibility for managers to monitor performance.

Optima CRM: Bridging Multiple Lead Sources into One Platform



Empowering Agents with Real-Time Mobile Lead Management

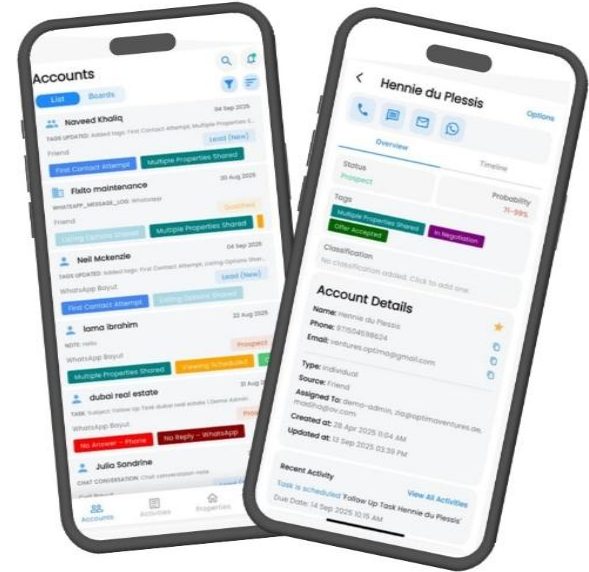
Optima CRM ensures every lead is captured, tracked, and assigned seamlessly.

Features:

- **Lead Sources:** Capture inquiries directly from Facebook, Instagram, Property Finder, Bayut, Dubizzle, and CSV import.
- **Automatic Assignment:** Leads are auto-assigned to agents based on defined rules (e.g., round-robin or performance-based).
- **Lead Tracking:** Monitor lead status from new inquiry → active → closed.
- **Follow-up & Reminders:** Ensure no lead is missed with built-in reminders and notifications.
- **Communication Channels:** Integrated email, phone, and WhatsApp support (optional).

Benefits:

- Faster response times.
- Fair and transparent distribution of leads.
- Higher conversion rates through consistent follow-up.



One Platform for All Your Property Listings

Optima CRM provides a centralized solution to manage and publish property listings efficiently.

Features:

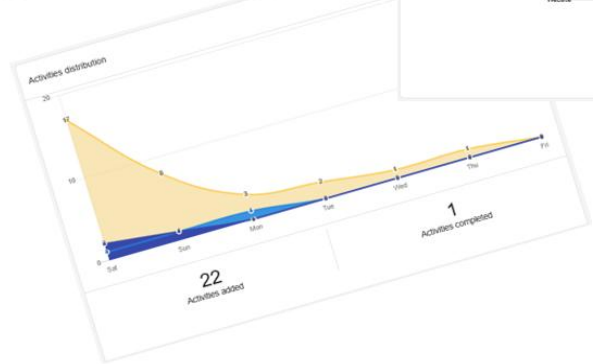
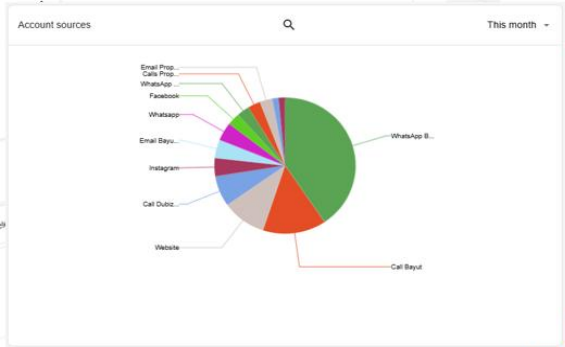
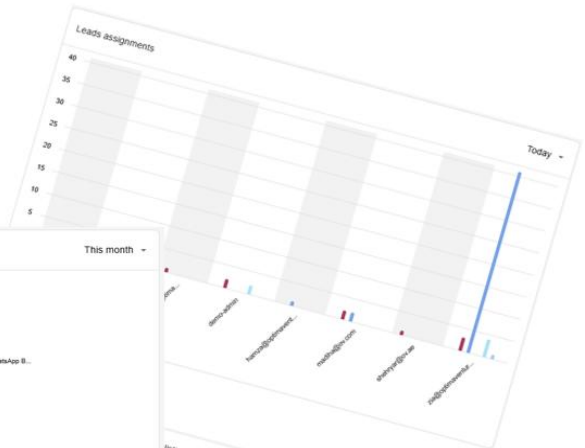
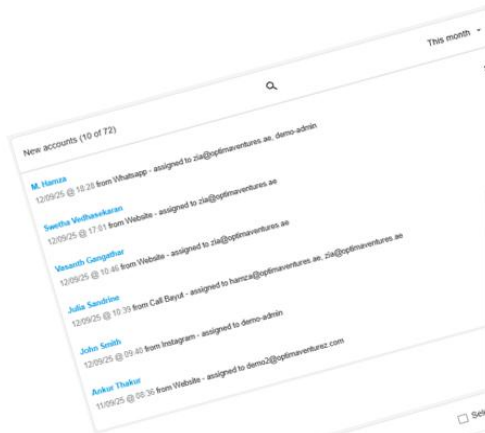
- **Property Database:** Create and manage property listings with images, descriptions, and pricing details.
- **Portal Integration:** Sync listings with major property portals such as Bayut, Property Finder, and Dubizzle.
- **Duplicate Control:** Avoid duplicate listings by automated property checks.
- **Agent Access:** Give authorized access to agents for viewing or editing listings.

Benefits:

- Save time by avoiding manual entry into multiple portals.
- Improve listing accuracy and professionalism.
- Maintain a clean and updated property inventory.



Real-Time Insights to Drive Smarter Sales Outcomes



Stay on Track with Follow-Ups & Reminders

Optima CRM

Demo Admin

September 2025

Monday Tuesday Wednesday Thursday Friday Saturday Sunday

Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
1	2	3	4	5	6	7
8	9	10	11	12	13	14
08:00 Tour		00:00 Meeting for the property with owner 17:28 Get permit number from DLD 18:00 Tour Hennie du Plessis	07:00 Tour Hennie du Plessis 10:30 Visit owner for property listing 11:00 Follow up from client 17:50 Share marketing material for Damac lagoons Marbella cluster 21:00 Property Update 21:48 Share option of Mortgage	11:22 Requesting the passport & emirates id 13:51 Whatsapp notification testing on Hennie du Plessis 0904598624 account 16:30 Follow Up Task Siddharth Jain 18:44 Client Talk 23:27 Follow Up Task JOHANN MARIOS VRANTZOGLOU 23:27 Follow Up Task JOHANN MARIOS VRANTZOGLOU	12:40 Follow up call Mohamed Tawfik 12:59 Follow Up Task John Smith 12:30 viewing 14:15 Follow Up Task Hennie du Plessis 14:22 Follow Up Task Hennie du Plessis 13:30 viewing 16:28 Follow Up Task JOHANN MARIOS VRANTZOGLOU 18:30 viewing 00:45 Follow Up Task Siddharth Jain	00:45 Follow Up Task Siddharth Jain 08:00 Follow Up Task dubai real estate 10:15 Follow Up Task Hennie du Plessis 18:30 Follow Up Task Ima Ibrahim 19:24 Follow Up Task Hennie du Plessis 20:00 Follow Up Task Mohamed Tawfik 19:00 Meeting with client 23:41 viewing

- Follow up call Mohamed Tawfik
- Follow Up Task John Smith
- viewing
- Follow Up Task Hennie du Plessis
- Follow Up Task Hennie du Plessis

Trusted by Leading Companies



Start Your Optima CRM Subscription

The subscription charges are per user per month

	Base <i>(Up to 10 users)</i>	11 - 29 Users <i>(10% Discount)</i>	30+ Users <i>(20% Discount)</i>
If you pay Semi-Annually	\$18.00 /user / month	\$16.20 /user / month	\$14.40 /user / month
If you pay annually (15% Discount)	\$15.30 /user / month	\$13.77 /user / month	\$12.24 /user / month

Optional Add-Ons & Extended Features Property Management, Lease Contract Handling, Maintenance Vendor Coordination, and Tenant Management can be offered upon request, with commercials updated accordingly. Additionally, advanced features such as WhatsApp Business API for marketing and promotions can be enabled at an additional cost.

No Initial Setup Fee

	Standard Pricing	Pricing for you
Setup Fee	\$500	Waived
Property Portals Integration	\$500	Waived

Lease Contract, Maintenance & Invoicing Management (Optional Module)

STREAMLINE RENTALS. SIMPLIFY PROPERTY MANAGEMENT. DELIVER SERVICE EXCELLENCE

Problem:

Relying on spreadsheets, scattered files, and messaging apps leads to missed deadlines, poor follow-ups, and frustrated tenants.

Solution:

- **Optima CRM** was built to centralize your operations, eliminate chaos, and bring efficiency to your rental and maintenance processes.
- Every property in **Optima CRM** is a live digital profile — connecting rental contracts, images, documents, service requests, and tenant data.
- **Group properties** into **Projects** like buildings or communities for smarter portfolio tracking and reporting
- Real-time **alerts** and full access to clients, owners, properties — from anywhere
- Create and manage **leases**, track **payments**, renewals, and deposits.
- Your **central source** of truth for every unit, owner, and asset.



EVERYTHING REVOLVES AROUND THE
PROPERTY — OPTIMA CRM CONNECTS IT
ALL EFFORTLESSLY



LOCATION

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