CRM CONVEYANCING
MANUAL

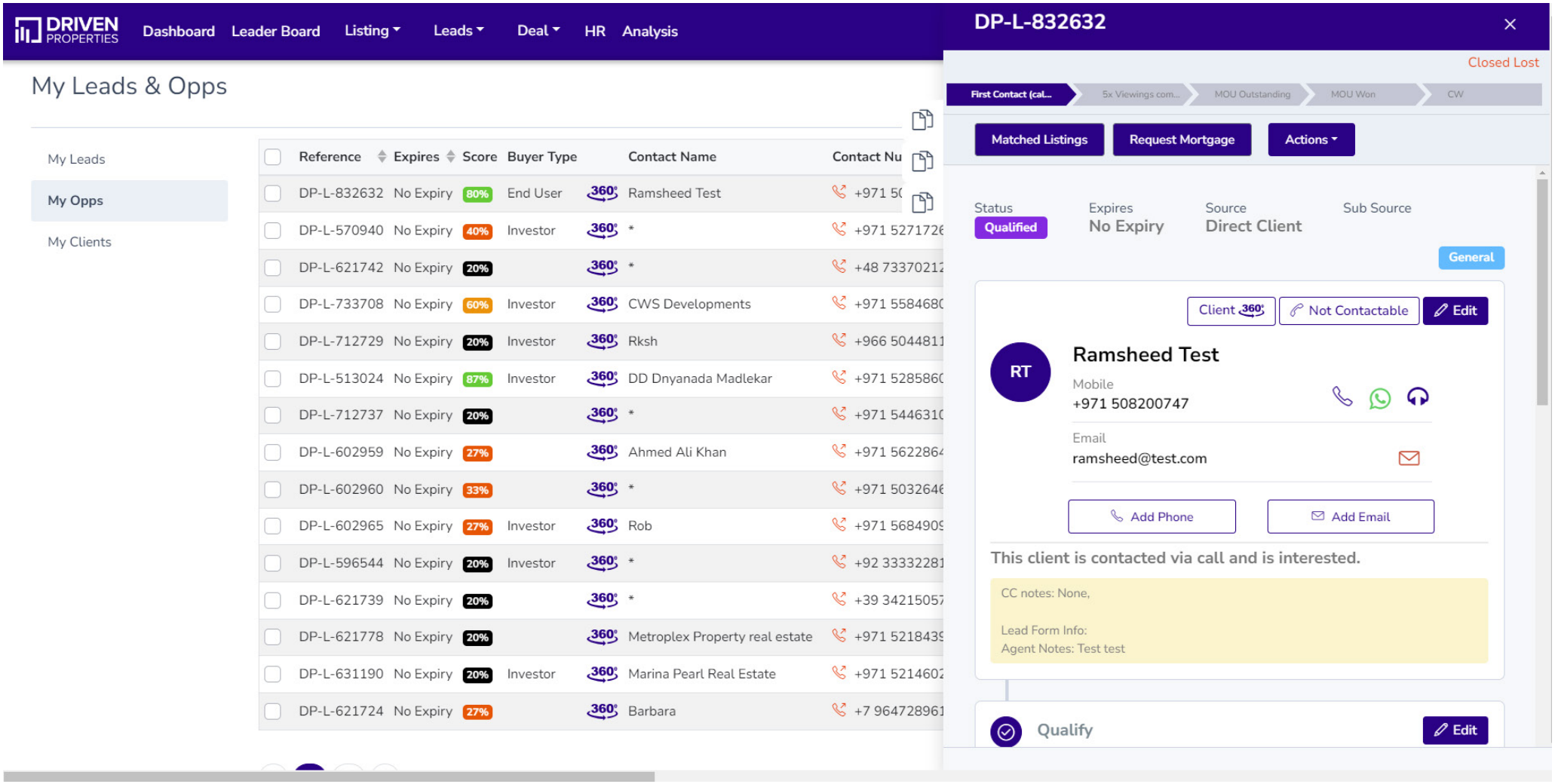


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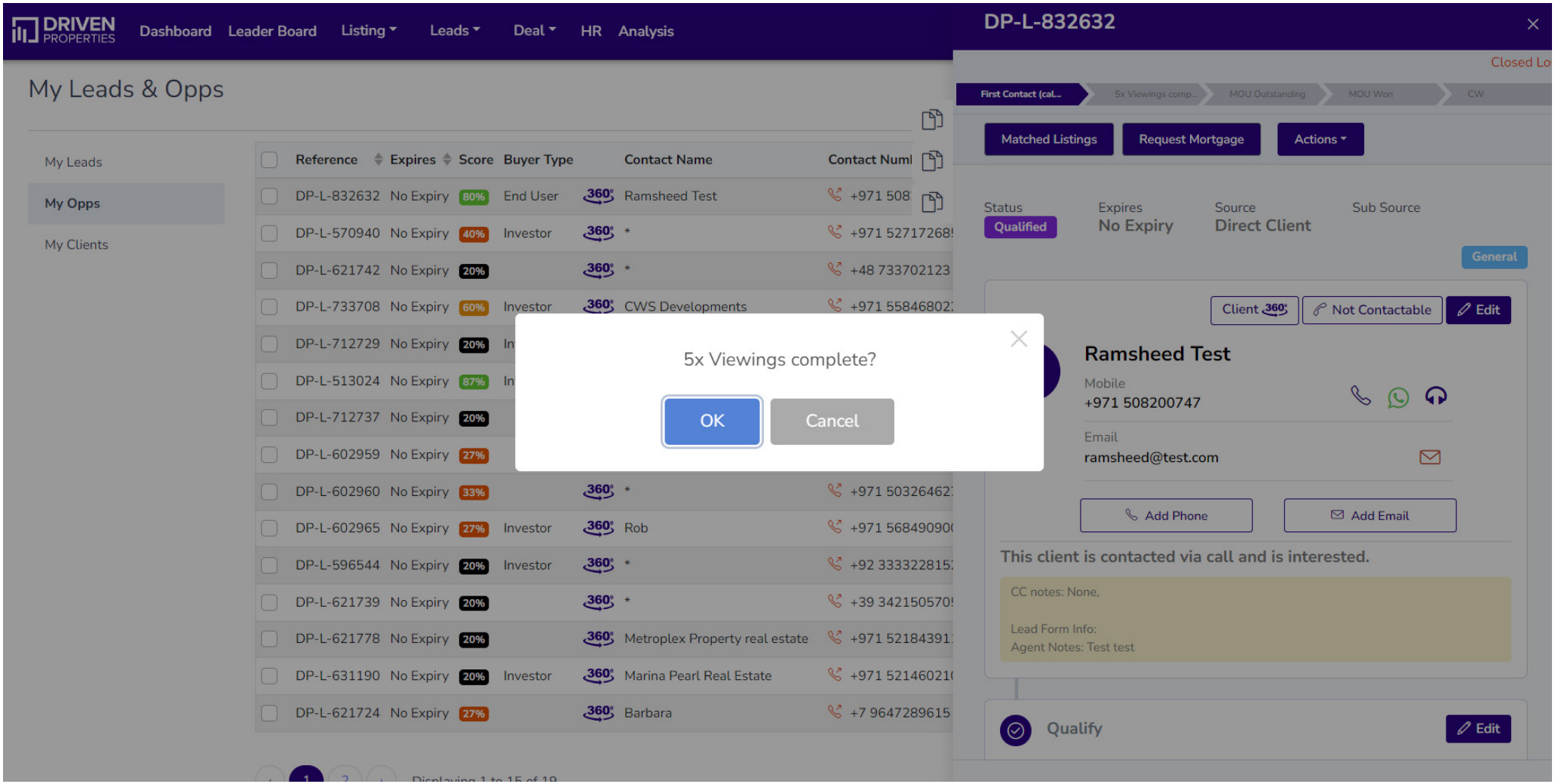
ACCESS OPPORTUNITIES

Navigate to your opportunities and locate the relevant client.



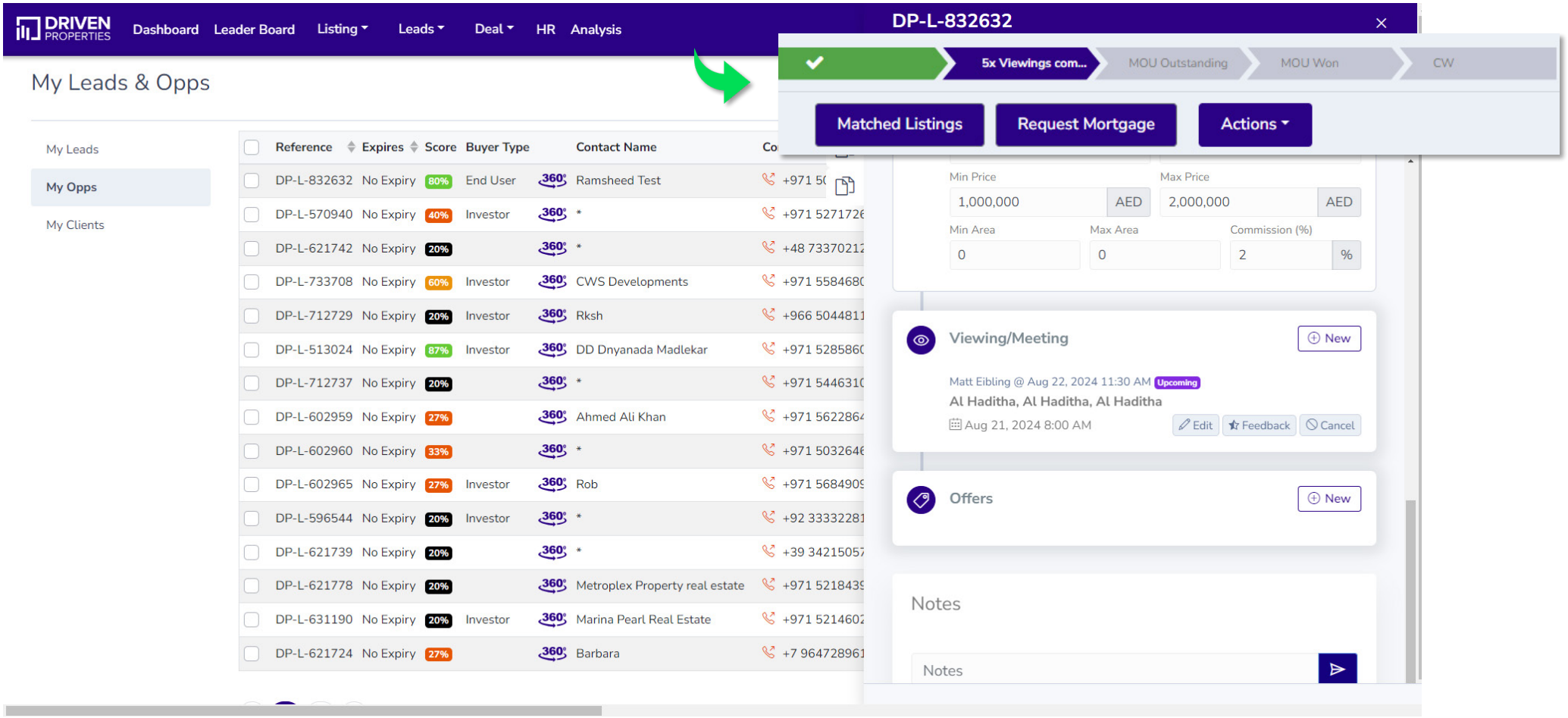
ACCESS OPPORTUNITIES

Confirm that you are in the appropriate funnel stage, such as “5x viewings complete.”



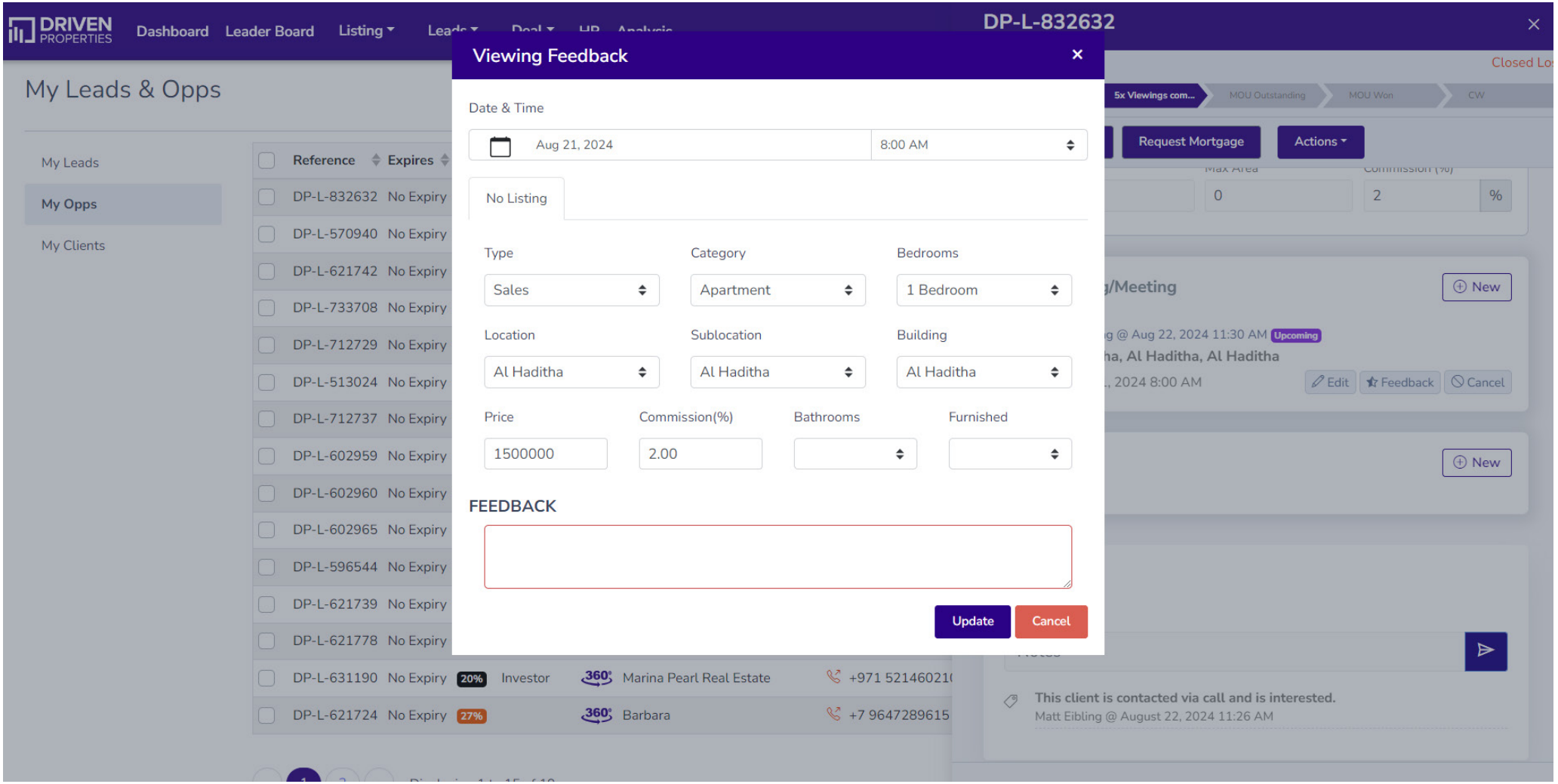
ACCESS OPPORTUNITIES

Ensure that the viewing that is attached to the offer is at the correct date and time. Please note, at least one viewing must be attached to the opportunity for the property under offer.



ACCESS OPPORTUNITIES

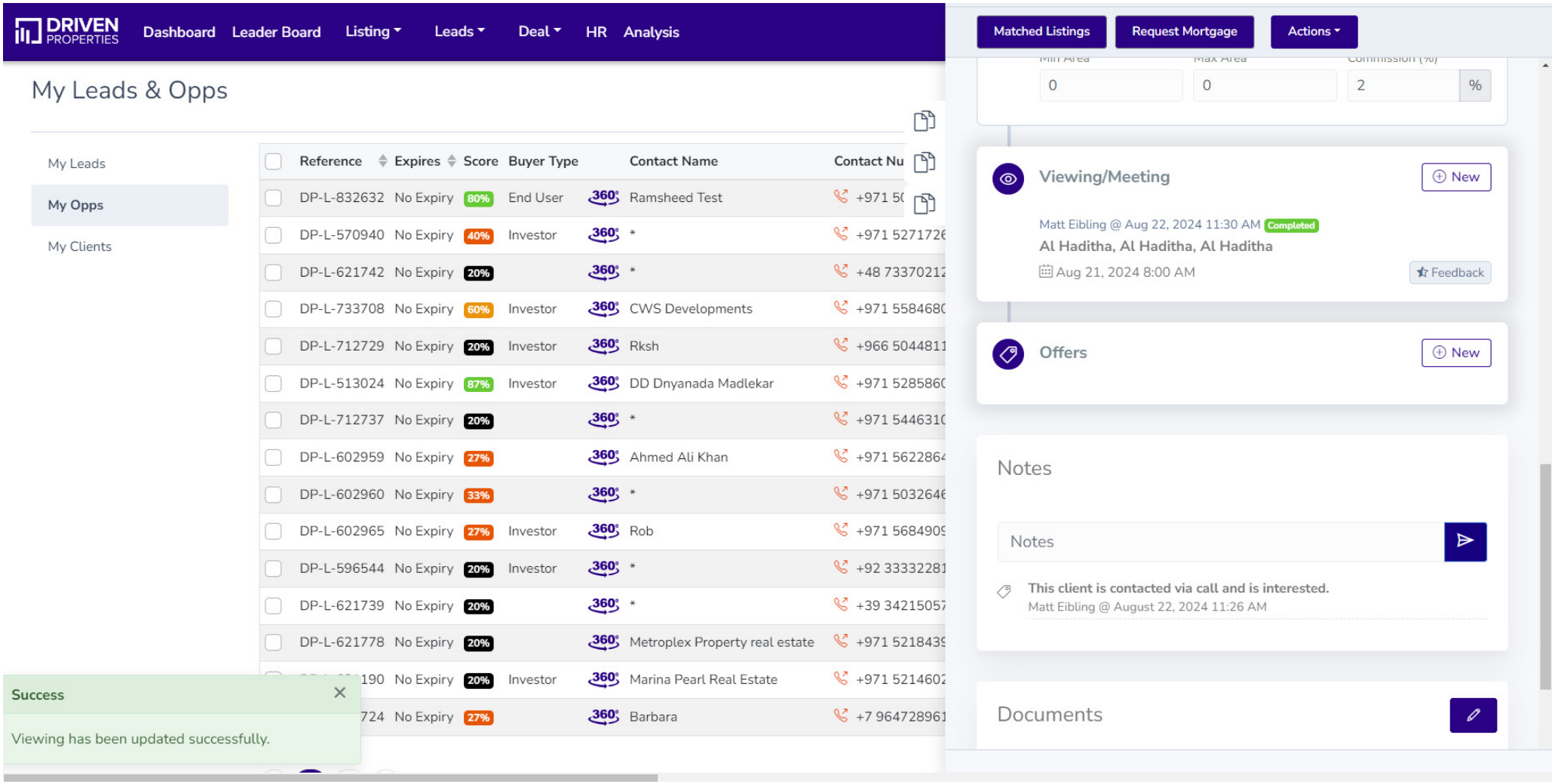
Add feedback for the relevant property viewing has been submitted. This step is essential before proceeding with a new offer. Once feedback has been submitted the status of the viewing will show as complete.




ADD NEW OFFER

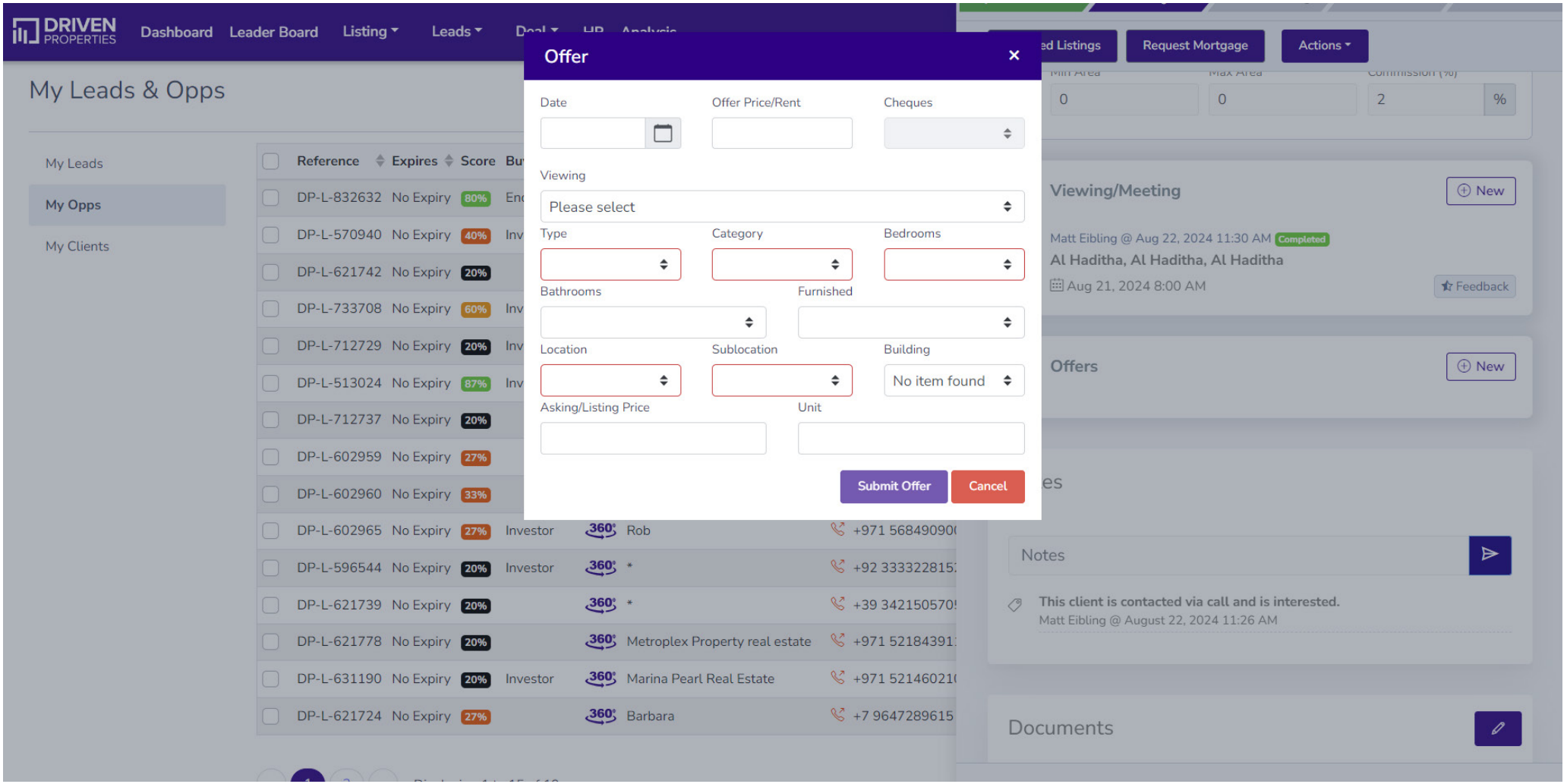
ADD NEW OFFER

Now you can add a new offer. Select the “New” button in the offer section.



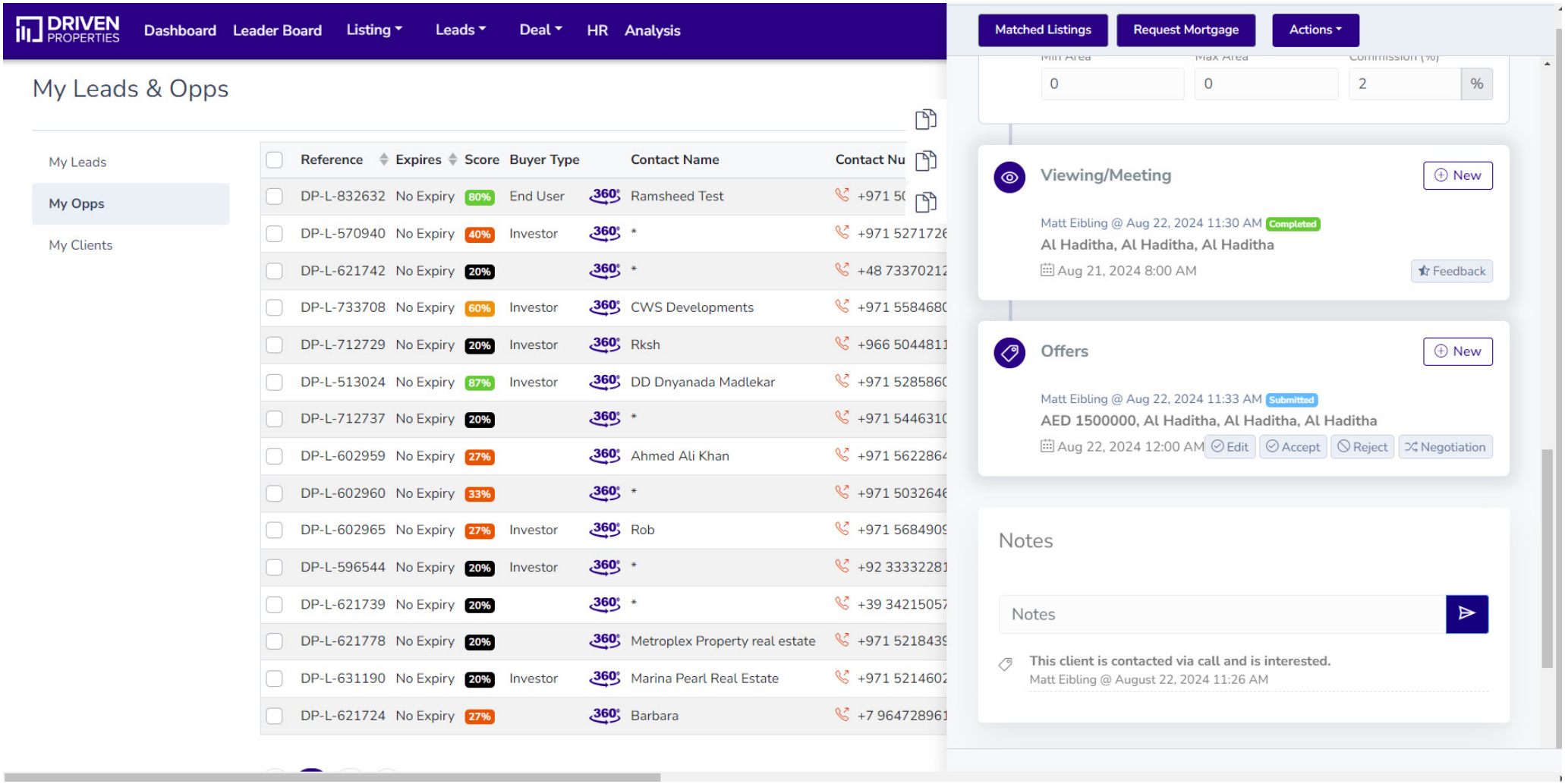
ADD NEW OFFER

Enter all the required information and link the offer to the corresponding viewing. Then press ‘submit offer’.



ADD NEW OFFER

The offer will now show as “submitted” and give you the following options: edit, accept, reject, negotiation. Once both parties have finalised the offer, select accept.

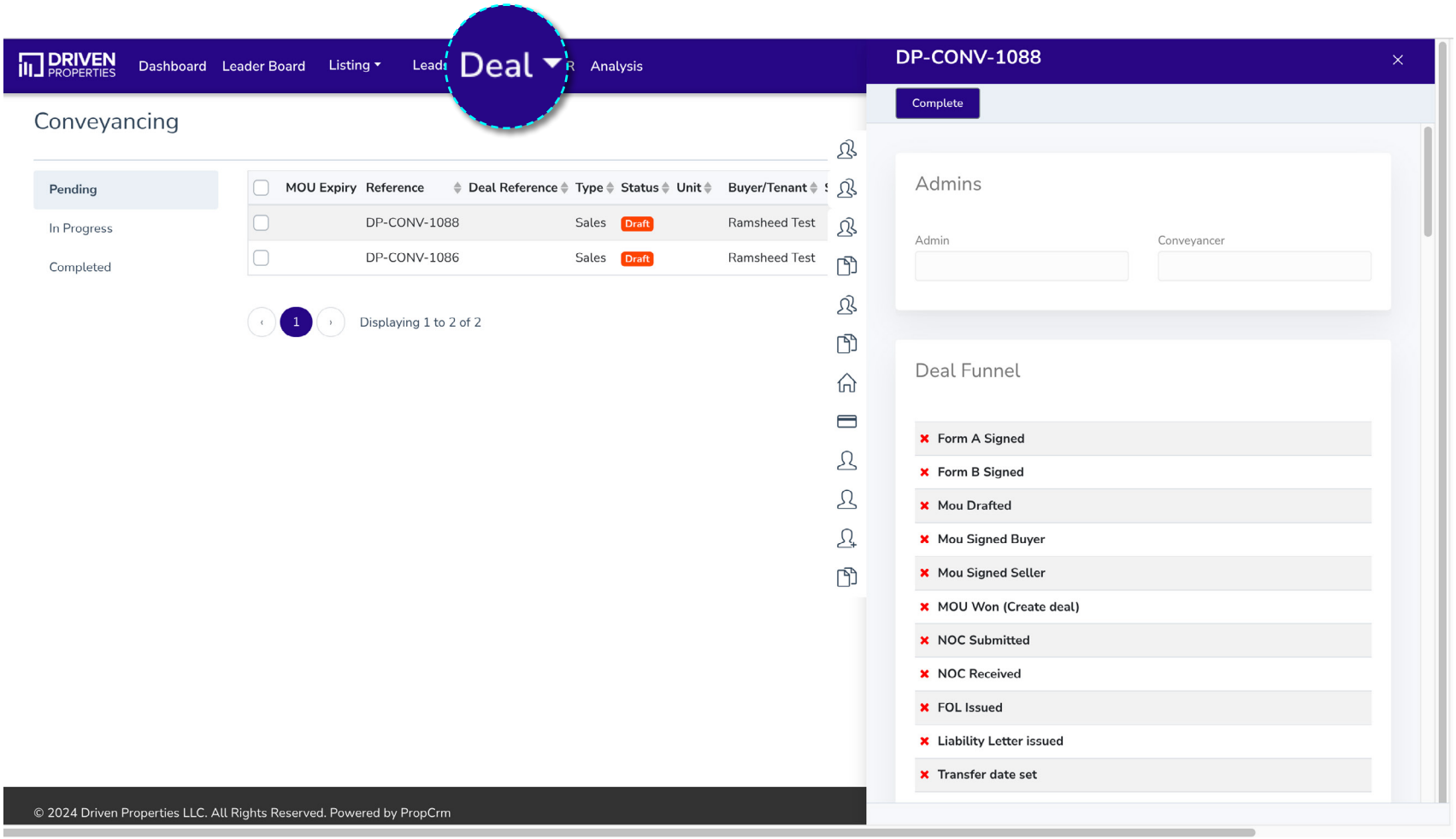


SUBMIT TO CONVEYANCING

It will now show as ‘accepted’ and provide the options to edit, convert to deal or conveyancing. Select conveyancing. A pop-up box will ask you to confirm you want to add this to conveyancing, select add. The status will now show as conveyancing and the offer will transfer to the conveyancing section within CRM.

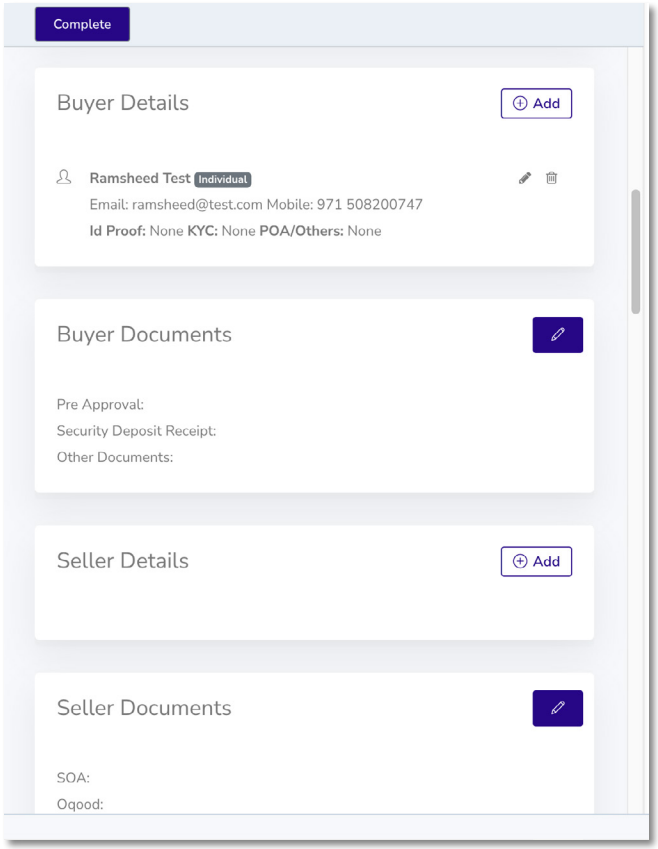
SUBMIT TO CONVEYANCING

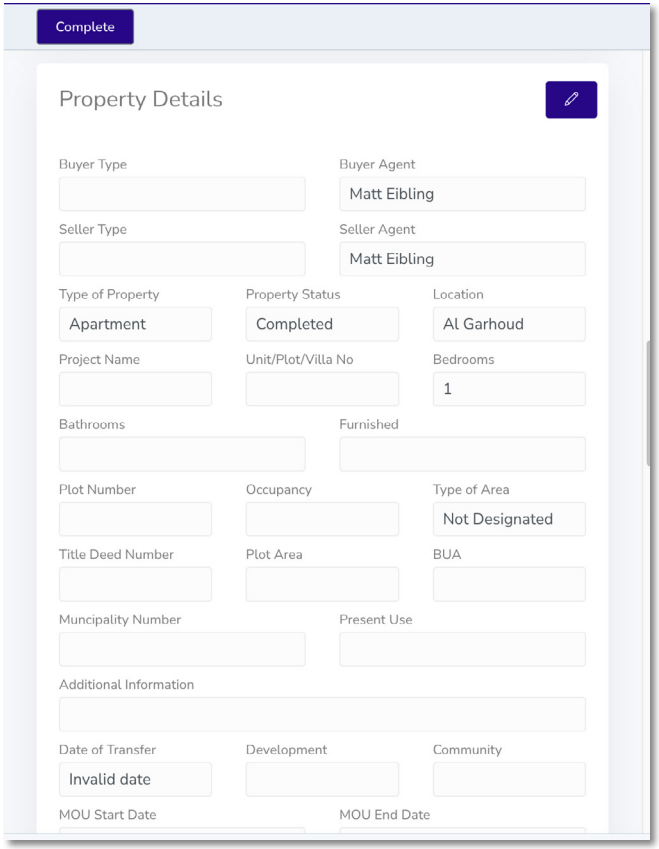
To get to this section go to Deals on the top menu bar and go to the conveyancing section. Find the relevant draft deal, open it via selecting it. In essence, this is where you now request Forms A B and F to be created by the conveyancing team in order for the deal to go ahead.

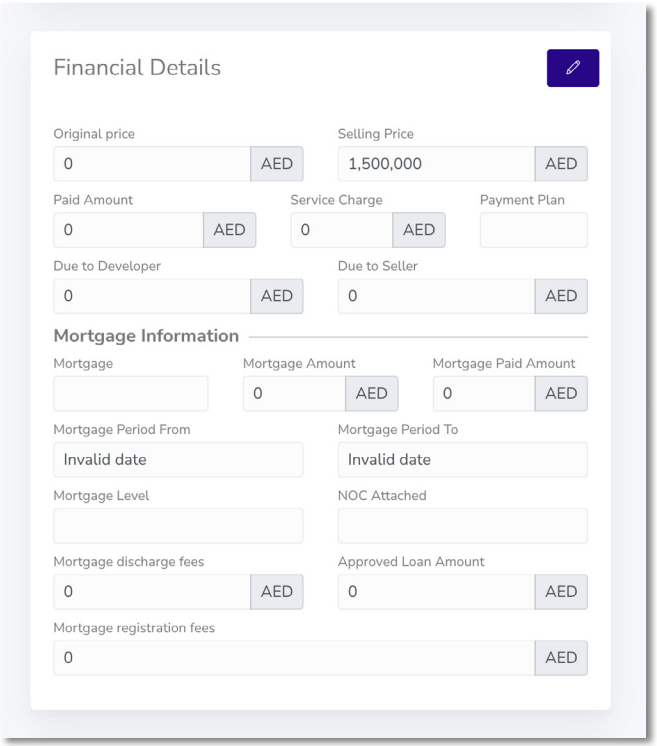


SUBMIT TO CONVEYANCING

The first two sections are admin and deal funnel, these will be filled out by conveyancing. The relevant sections you need to fill out are byer details, buyer documents, seller details, seller documents, property details, financial obligations, external agency details (if applicable) and documents. Before conveyancing will accept the deal, you need to ensure that all information in this section is filled out correctly with all necessary documents uploaded.

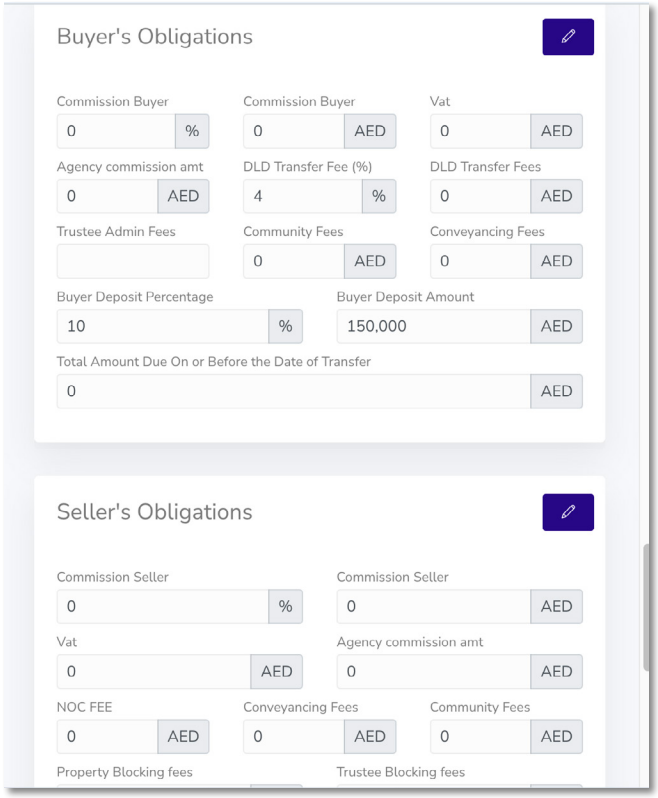


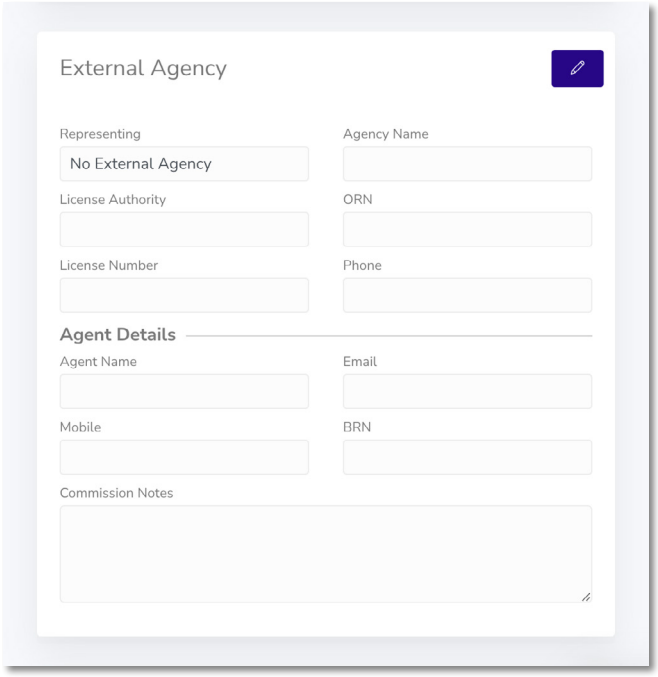


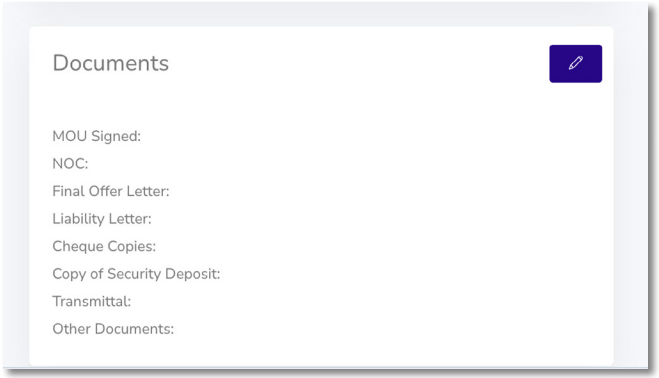


SUBMIT TO CONVEYANCING

Once all information has been input, select the complete button on the top bar.

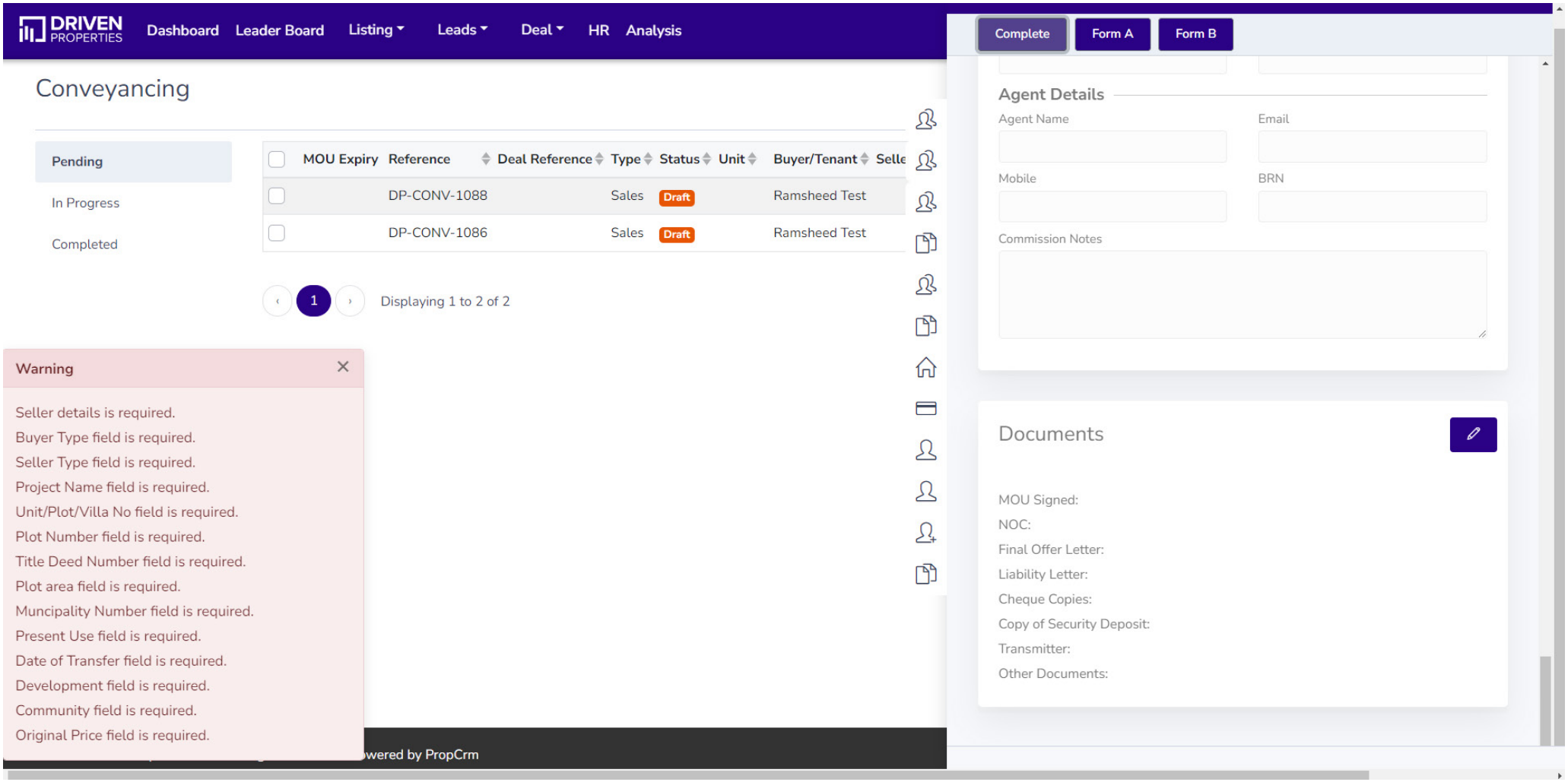






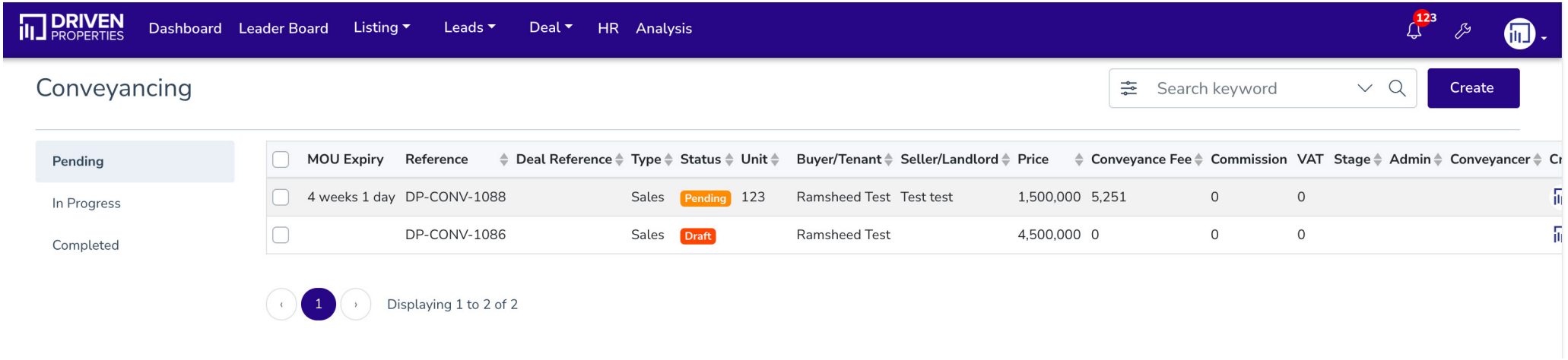
SUBMIT TO CONVEYANCING

If any of the information has not been submitted, a red error message will show identifying what information was not added.



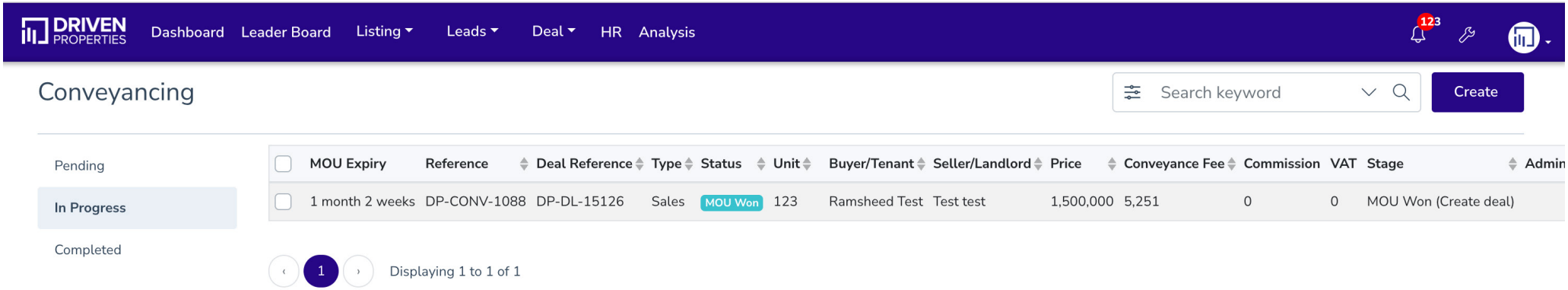
SUBMIT TO CONVEYANCING

Now it will show as pending in this section until it is accepted by the conveyancing team. Conveyancing will either accept this or email you with questions regarding your deal.



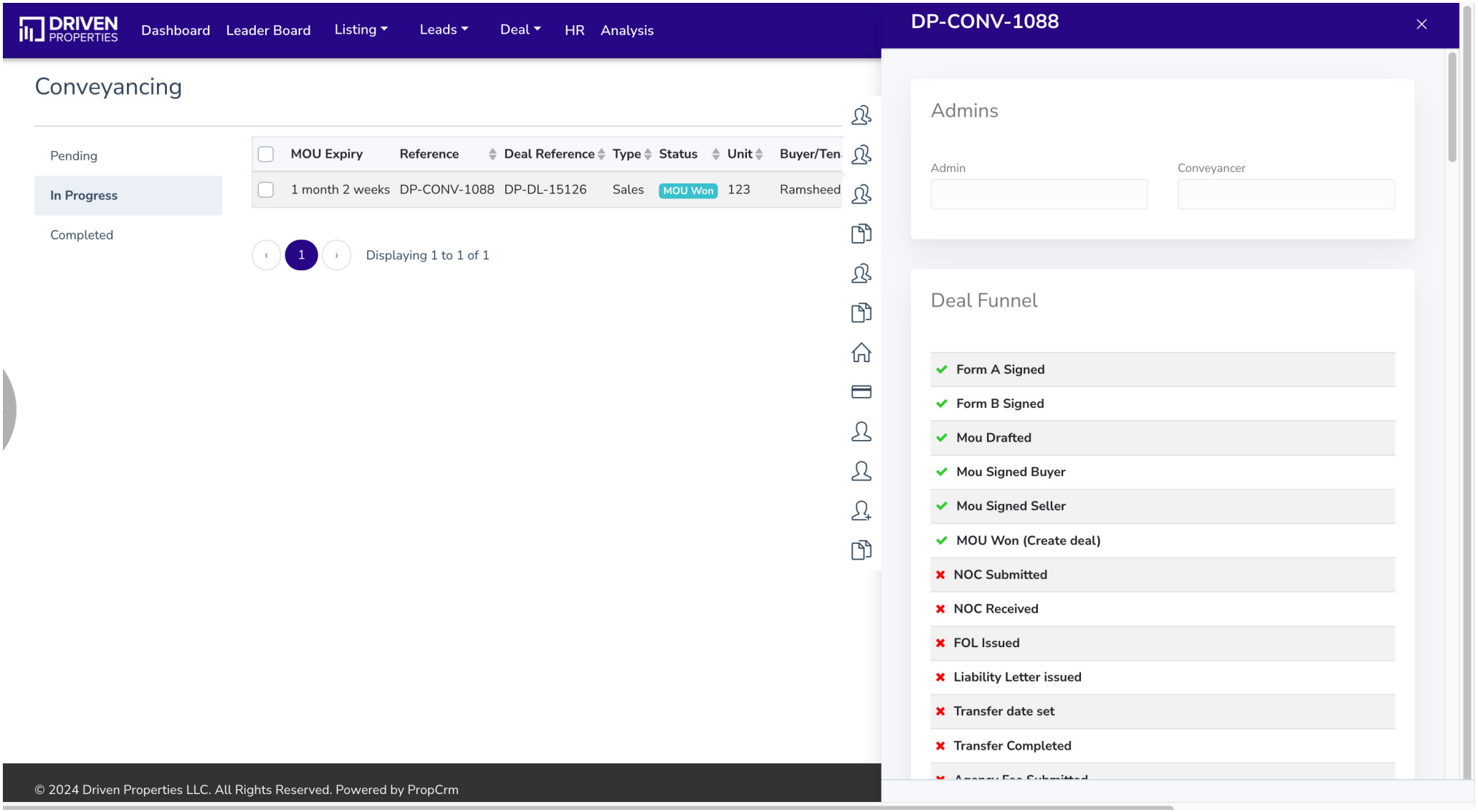
SUBMIT TO CONVEYANCING

Once the deal has been marked as MOU won (i.e. the Form F has been created and signed) it will move to the ‘in progress’ tab on the lefthand side of the screen.



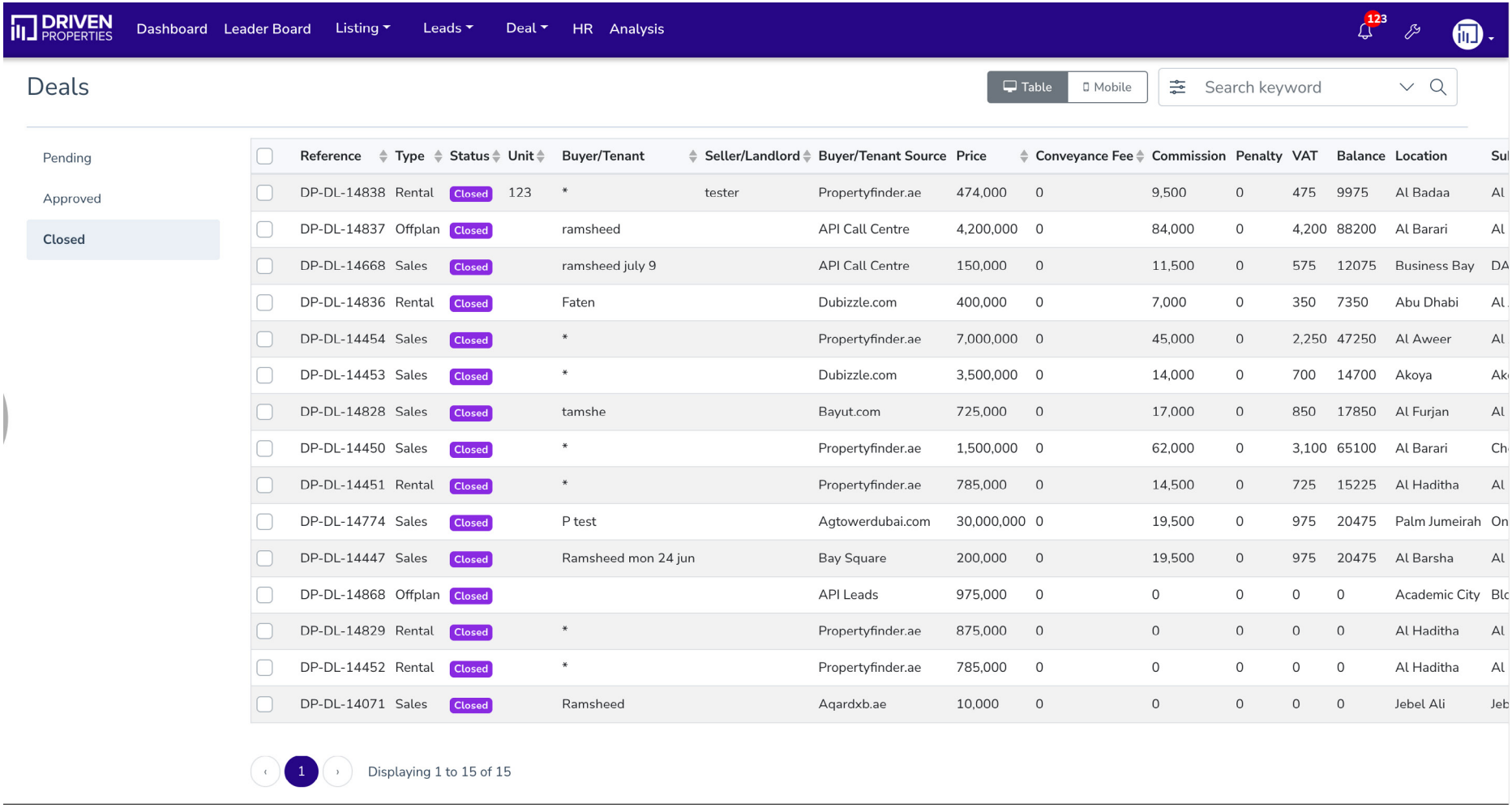
SUBMIT TO CONVEYANCING

The status will show what stage the deal is at. You will be able to see what stage the deal is at on the deal funnel.



SUBMIT TO CONVEYANCING

When the transfer is complete, the conveyancing team will mark the deal as agency fee submitted and it will automatically transfer to the finance team to be processed. The deal will move into closed under your deals on the menu bar.



AGENT VS. CONVEYANCER RESPONSIBILITIES

AGENT VS. CONVEYANCER RESPONSIBILITIES

PRE-FORM F RESPONSIBILITIES

The agent is responsible for all tasks leading up to the signing of Form F. This includes negotiating the commission and conveyancing fee, collecting the security deposit and obtaining all relevant documents.

POST-FORM F RESPONSIBILITIES

Once Form F is signed, the conveyancing team will manage the deal, including client communication (if requested by the agent), applying for the No Objection Certificate (NOC), and arranging the transfer process.

CONVEYANCING TEAM'S ROLE

While the conveyancing team can provide guidance on the terms and conditions of Form F, advising on alternative terms and conditions for ad-hoc cares or transactions. They do not participate in negotiating any of the details, however.

AGENT'S PRESENCE REQUIRED

Agents must be present at valuations and the transfer appointment.

This division of responsibilities ensures clarity and efficiency throughout the process.

THANK YOU

DRIVEN | Forbes GLOBAL PROPERTIES

BUSINESS BAY

2nd Floor, Building 13, Bay
Square Business Bay, Dubai

Tel: +971 (0) 4 429 7040
Fax: +971 (0) 4 429 6024

BRANCH OFFICES

JAFZA

LB09026 Building 09, JAFZA,
Dubai, UAE

DUBAI CREEK HARBOUR

Office GFR- 08
Dubai Creek Harbour Residences
South tower 2, Dubai, UAE

DUBAI HILLS ESTATE

Shop R09C Ground Floor, Acacia 1,
Dubai Hills Estate

JUMERIAH VILLAGE CIRCLE

Shop No. 4, Chaimaa Premiere JVC,
District 15, Dubai, UAE

INTERNATIONAL OFFICES

CHINA

Office 905, Phase 2, Lvdi Square,
Tongzhou District, Beijing, China

SAUDI ARABIA

Alabdulkader building, Thaliya street,
Al Sulaimania Area P.O.Box No - 2468
Riyadh - 11451, Saudi Arabia