



Case Study

A SaaS-CRM, MLS and transaction management system
for a US-based real estate company

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We developed a SaaS-CRM, MLS and transaction management system for a US-based real estate company



Summary

We developed a full-scale SaaS solution for a US-based real estate giant to automate sales and customer lifecycle management. The solution focused on consolidating customer information into a single repository that would help agents manage customer relationships and automate complex routine tasks. Besides, we provided a robust architecture for an interconnected and horizontally scalable solution to manage operations and resources in a more streamlined and cost-efficient manner. It included advanced analytics, reporting, and other features such as sales forecasting, multiple listing service (MLS), and AI-based document scanning. We also rendered extendible APIs that can be integrated with other modules, as and when required.

Industry

Real Estate

Users/customers

Admin, Superadmin, Brokers, Agents, HR Recruiter

Tech Stack

Django (Python), Angular 8, PostgreSQL (v12.1), Elasticsearch (v6.x), Kafka (v2.2.x), Redis (v5.x), Docker

Team Size

8 Oodlites

(1 Project Manager, 3 Backend Developers, 2 Frontend Developers, 2 QA Engineers)

Scope of Work (SoW)

The scope of work (SoW) required us to develop a SaaS-based CRM application and transaction management system to support a large-scale real estate business. The client sought our services to develop a customer-facing web application and a backend admin panel for property management and customer lifecycle management.

The project requirements included but were not limited to the following:

1. Property Management

Our client required a robust property management system with a customer-facing web application as well as an admin panel for agents and brokers.

2. Transaction Management

Our team was responsible for building their server-side core that may scale thousands of concurrent users at any given time.

3. Email Marketing Automation

They required marketing support to run targeted email campaigns with several built-in email templates.

4. Multiple Listing Service (MLS)

The client required MLS integration to track, manage, filter, and organize various real estate listings in one place.

5. CRM and Contact Management

A CRM module was required to manage customer accounts, import/export contacts, track leads, and add tamper-proof records for agents and brokers.

Solution

We analyzed our client's requirements and had a kick-off meeting to put together a team of developers for the project. Our team began with a careful assessment of the client's existing business model and formulated an execution strategy to achieve the tasks at hand. We followed agile methodology to carry out the development process in a phased manner, starting with graphic design and then moving ahead with the frontend and backend interfaces. We also deployed two QA engineers to test each functionality against a given set of quality standards and one DevOps engineer (on-demand) on a time-and-material basis.

We successfully achieved our client's requirements with the following deliverables:

1. Developed The Admin Panel For Property Management


We successfully built their admin panel with all the required features and module integrations. Our team established secure authentication and authorization by implementing JSON web token (JWT) to leverage microservices architecture.

2. Provided Support For Security Groups and User/Role Management

We established a robust role management system, implementing the concept of super admin for assigning roles, creating and customizing security groups, and more. Super admins can add/remove users, assign roles, and customize them at any given time. They can also activate or deactivate any user account as and when required.

3. Transaction Management

Our transaction management system focused on tracking all financial transactions pertaining to various leases and maintaining transaction history along with agent/broker details.



4. Provided The Required Functionalities For CRM and Contact Management

Our team developed and customized a full-fledged CRM module for contact management as per the client's requirements. The module mainly focused on managing customer accounts, import/export customer records, view/update account details, and the likes.

5. Document Management and MLS

We built a document management system with category filters, and an AI-based file manager to keep track of all financial and lease-related documents. We also provided them with an MLS module to add/remove property listings, search new properties, browse property history, and check market trends.

Results

We successfully completed the project within the stipulated time frame and achieved our client's requirements with the following deliverables:

- Delivered a scalable transaction management system for property management to automate and simplify the sale/purchase of properties listed on the website.
- Provided an integrated CRM and contact management system with features such as bulk import/export (contacts), category filters, email campaign, event sequencing, and more.
- Our solution helped the client to strengthen their real estate network and build a holistic property management system which ultimately saved up to \$300,000.

About Oodles ERP

Oodles ERP is a software services company that offers complete enterprise software development services with a focus on implementing next-gen technologies. With a proven track record in custom ERP development, we have successfully completed 50+ software projects related to CRM, HRM, inventory/warehouse, eCommerce, supply chain, and logistics. We are mainly focused on helping startups and small-to-medium enterprises to achieve digital transformation through cost-effective ERP software solutions.

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