

Demo Walkthrough

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# AGENT TIME BUYERS AGENCY SUITE

THE COMPLETE REAL ESTATE CRM SOLUTION

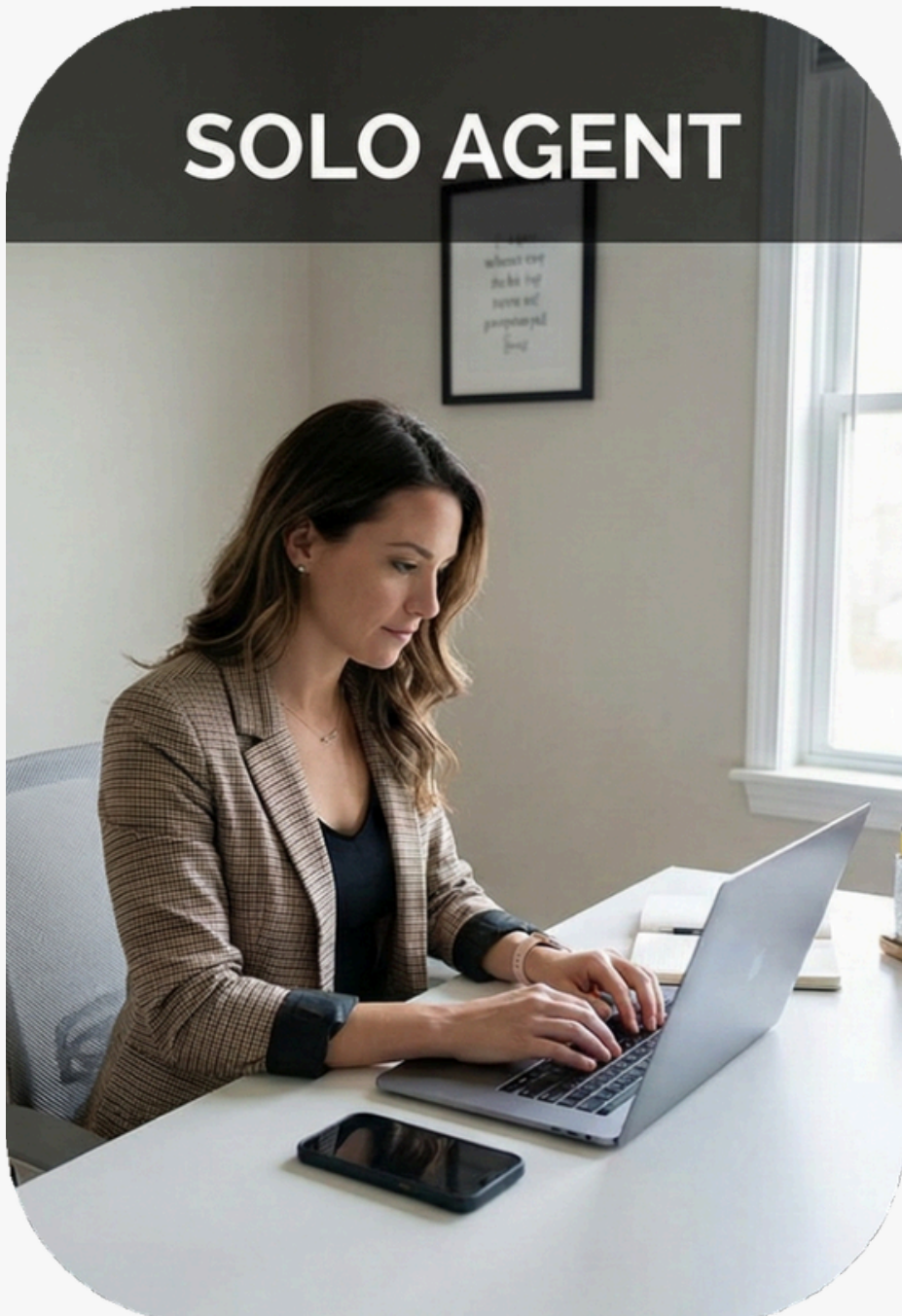


# Close More Deals. Stress Less.

## The Operating System Built for Buyer Agents

Not sales teams, not generic real estate CRMs. Whether you are a solo buyer agent, a growing team or a full buyer agency, this system is designed around how you actually work every day.

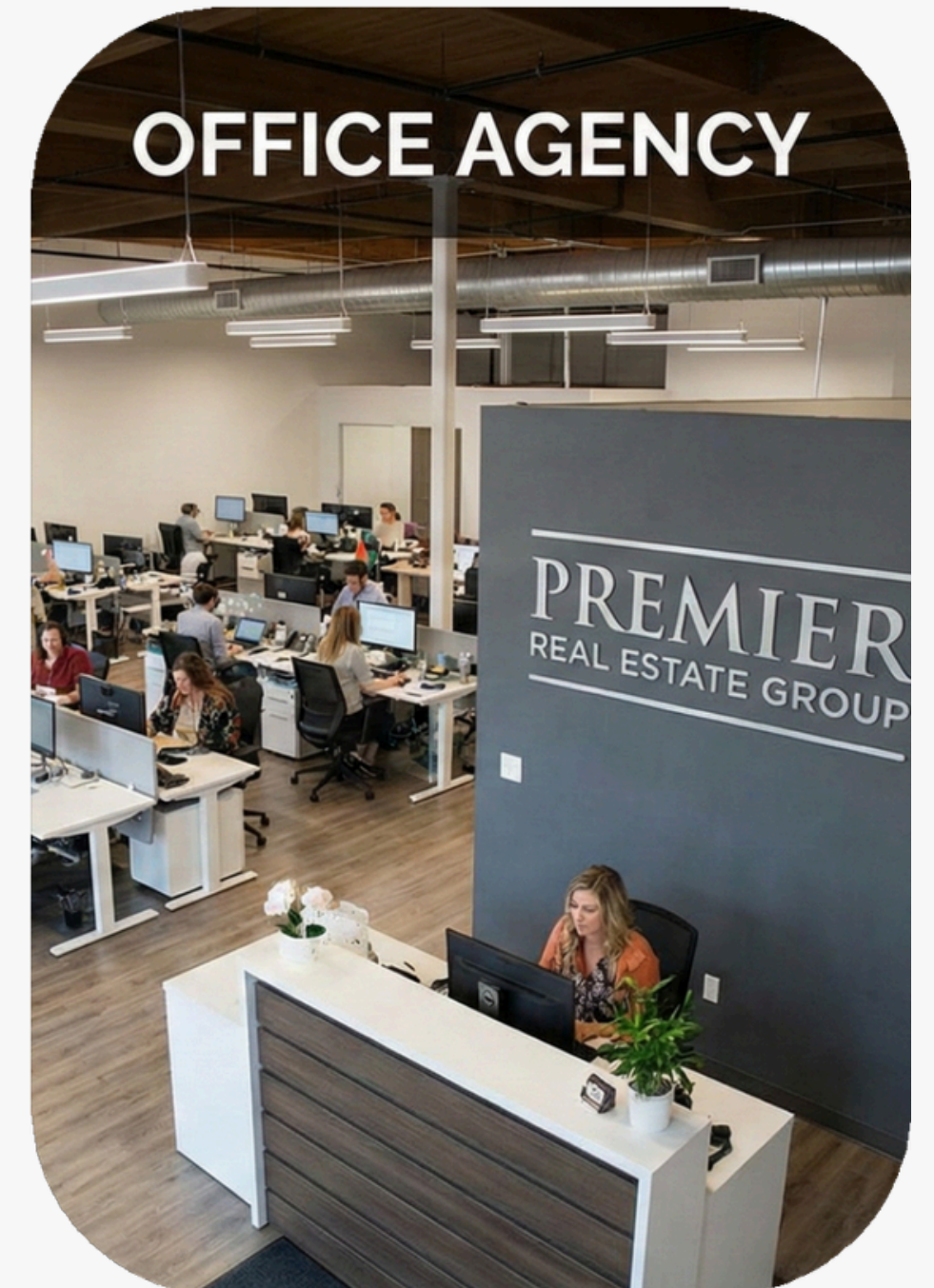
### SOLO AGENT



### SMALL TEAM



### OFFICE AGENCY



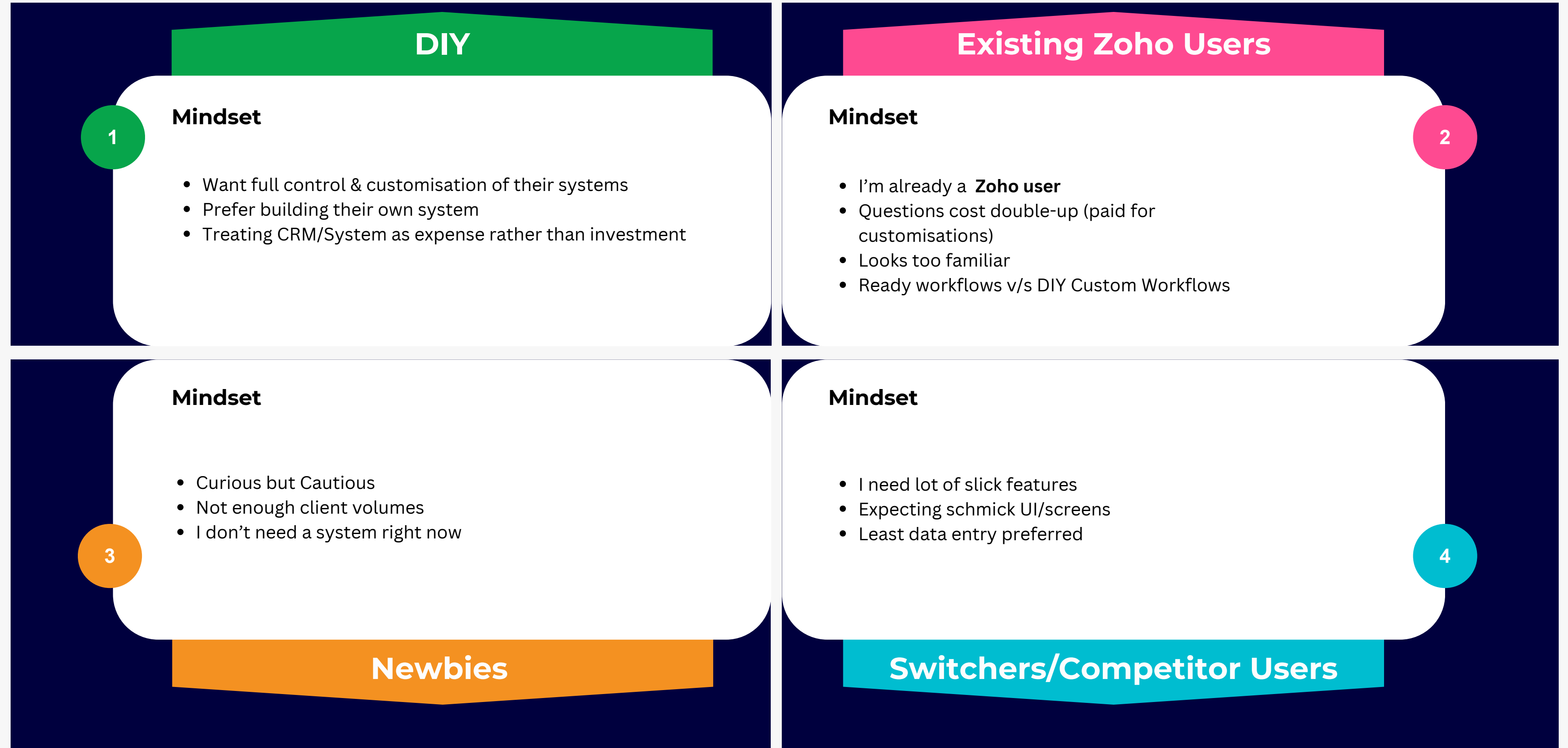
# A Day in Your Life as a Buyer Agent

Your work is spread across too many places.  
And somehow... you're expected to never miss anything.



**This is the reality for most buyer agents today.**

# Most Buyer Agents Fall into one of these 4 Quadrants



# Never Miss a Lead Again

Every deal starts with a lead. If your lead flow is messy, your business becomes messy. AGENT TIME captures, tracks and organises every lead so nothing slips through.

The screenshot displays the AGENT TIME Leads Module interface. At the top, there is a navigation bar with tabs for Home, Leads, Clients, Accounts, Deals, Tasks, Meetings, Calls, Reports, Analytics, Products, Properties, Referral Deals, SMS History, WhatsApp History, Sender IDs, Templates, Industry Contacts, and Quotes. Below the navigation bar, there is a search bar and a filter dropdown set to 'All Leads'. The main area is a Kanban board with columns representing lead statuses: New Lead (15), Attempted to Contact (6), Contacted (2), Book an Appointment (1), Booking Completed (5), Discovery Call Completed (1), Junk Lead (8), and Lost Lead (0). Each column contains lead cards with details such as name, contact information, and booking status. The 'New Lead' column lists leads like Joey Tribbiani, Charlotte Evans, Jackson Moore, Chloe Adams, Ethan Walker, and Ava Harris. The 'Attempted to Contact' column lists leads like test 0845, Mia Thompson, Olivia Smith, and Noah Clark. The 'Contacted' column lists leads like Nish Reddy and Mia Thompson. The 'Book an Appointment' column lists Lucas White. The 'Booking Completed' column lists leads like Test 10Demo, David, Chandler 001, test0749, and Liam Taylor. The 'Discovery Call Completed' column lists Muthumma M. The 'Junk Lead' column lists leads like Muthumma, Henry Scott, Benjamin King, Isabella Green, and Jackson Moore. The 'Lost Lead' column is currently empty, showing 'No Leads found.'

My Kanban View ✎ Sort By Lead Status ▾ Asc ▾

**New Lead 15**

- Joey Tribbiani  
9074617161  
Webinar  
**Booking Pending**
- Charlotte Evans  
Home Buyer  
4889012345  
Walk-In  
**Booking Pending**
- Jackson Moore  
Investor  
4334567890  
Cold Call  
**Booking Pending**
- Chloe Adams  
Home Buyer  
4223456789  
Site Visit  
**Booking Pending**
- Ethan Walker  
Investor  
4112345678  
Property Portals  
**Booking Pending**
- Ava Harris  
Home Buyer  
4901234567  
Agent Referral  
**Booking Pending**

**Attempted to Contact 6**

- test 0845  
Investor  
Cold Call  
**Booking Pending**
- test 0845  
Investor  
Cold Call  
**Booking Pending**
- Mia Thompson  
Home Buyer  
4445678901  
Lead Form  
**Booking Pending**
- Olivia Smith  
Home Buyer  
4567890123  
Cold Call  
**Booking Pending**
- Noah Clark  
Investor  
4890123456  
Cold Call  
**Booking Pending**
- Olivia Smith  
Home Buyer  
4567890123  
Cold Call  
**Booking Pending**

**Contacted 2**

- Nish Reddy  
Investor  
SMS  
**Booking Pending**
- Mia Thompson  
Home Buyer  
4445678901  
Lead Form  
**Booking Pending**

**Book an Appointment 1**

- Lucas White  
Investor  
+61423699428  
Cold Call  
**Booking Pending**

**Booking Completed 5**

- Test 10Demo  
+61404040404  
Bookings Page  
**Booking Confirmed**
- David  
+919088115544  
Bookings Page  
**Booking Confirmed**
- Chandler 001  
+919088765544  
Bookings Page  
**Booking Confirmed**
- test0749  
+61405050505  
Bookings Page  
**Booking Rescheduled**
- Liam Taylor  
Investor  
4678901234  
Advertisement  
**Booking Confirmed**

**Discovery Call Completed 1**

- Muthumma M  
Home Buyer  
+61423699428  
Chat  
**Booking Confirmed**

**Junk Lead 8**

- Muthumma  
Investor  
Local Agent Network  
**Booking Pending**
- Henry Scott  
Investor  
4990123456  
Agent Referral  
**Booking Pending**
- Benjamin King  
Investor  
4778901234  
Existing Client Referral  
**Booking Pending**
- Isabella Green  
Home Buyer  
4667890123  
Cold Call  
**Booking Pending**
- Jackson Moore  
Investor  
4334567890  
Cold Call  
**Booking Pending**
- Ethan Walker  
Investor  
4112345678  
Property Portals  
**Booking Pending**

**Lost Lead 0**

No Leads found.

# Track Every Opportunity

Every deal has its journey. From initial interest to closing, you can see exactly where each deal stands and what's next. No surprises, no missed steps.

- Manage deals with stages (customisable if needed).
- Link deals to clients and properties.
- Visual pipeline showing progress.

The screenshot displays the AgentTime Deals Module interface. At the top, a navigation bar includes tabs for Home, Leads, Clients, Accounts, Deals (selected), Tasks, Meetings, Calls, Reports, Analytics, Products, Properties, and Referral Deals. A search bar and utility icons are on the right. Below the navigation, a filter bar shows 'All Deals' and a 'Create Deal' button. The main area is a 'STAGEVIEW' showing a pipeline of deal stages:

Stage	Count	Progress	Total Value
Discovery Call Completed	1	20%	AU\$ 2,500.00
Fee Negotiation	1	40%	AU\$ 15,000.00
Contract Issued	1	75%	AU\$ 3,000.00
Contract Signed	1	90%	AU\$ 2,500.00
Issue Invoice	4	95%	AU\$ 37,000.00
Retainer Paid / Won	17	100%	AU\$ 65,547,398.00

Below the pipeline, individual deal cards are shown, each with a name, user ID, value, and date:

- Discovery Call Completed:** patrick uat1, AU\$ 2,500.00, Dec 20, 2025
- Fee Negotiation:** Benjamin King uat1, AU\$ 15,000.00, Nov 5, 2025
- Contract Issued:** Robert Chase uat1, AU\$ 3,000.00, Dec 20, 2025
- Contract Signed:** Isabella Green uat1, AU\$ 2,500.00, Nov 21, 2025
- Issue Invoice:** Michael Scott uat1, AU\$ 2,000.00, Dec 20, 2025; Test uat1, AU\$ 15,000.00, Nov 22, 2025; Dev Agent Time 01 uat1, AU\$ 5,000.00, Nov 12, 2025
- Retainer Paid / Won:** Amelia Carter uat1, AU\$ 1,000.00, Dec 20, 2025; Pam Beesly uat1, AU\$ 2,500.00, Dec 18, 2025; Testing UAT# 03dec uat1, AU\$ 5,000.00, Dec 18, 2025; Dev Agent Time 01 uat1

# Know Your Clients Inside Out

*Build stronger relationships by having every interaction, every requirement, every preference, about your clients all in one place. From first enquiry to settlement, nothing is missed.*

All Tabs ▾
Home
Leads
Clients
Accounts
Deals
Tasks
Meetings
Calls
Reports
Analytics
Products
Properties
Referral Deals
SMS History
WhatsApp History
Sender IDs
Templates
Industry Contacts
Quotes
...
+
🔍
🔔
📅
⚙️
👤

←

**Sam - test**

Add Tags

Send Email

Edit

Send SMS ▾

...

Overview

Timeline

Last Update : 31 day(s) ago

Client Owner

uat1

Lead Type

Industry Contact

**Finance Details**

Ordered Items ▾

Shipments In Progress ▾

Receivables & Payables ▾

**Hide Details**

Client Information			
Lead Type	Industry Contact	Lead Source	—
Client Name	Sam	Secondary Source	—
Email	<a href="mailto:test@testt.com">test@testt.com</a>	Account Name	test
Secondary Email	—	DOB	—
Trade/Profession	—	Email Opt Out	—
Mobile	—	Client Owner	uat1
Phone	—	Exchange Rate	1
Currency	AUD		

- Related List
- Notes
- Emails
- Deals
- Properties
- Attachments
- Open Activities
- Closed Activities
- SMS History
- WhatsApp History
- Invited Meetings
- Products
- Quotes
- Invoices
- Industry Contact
- Referrals 2
- Leads
- Deals
- Invoices
- Zoho Finance
- Zoho Expense
- Zoho Billing
- [Add Related List](#)

# Organise Every Property Seamlessly

*From listing to closing, properties are linked to clients and deals.  
Keep your entire property inventory organised and searchable, ready to match buyers faster.*

All Tabs ▾ Home Leads Clients Accounts Deals Tasks Meetings Calls Reports Properties Analytics ...



🔍 All Properties ▾



Create Property ▾

Actions ▾

All ▾

Total Records 30

100 Records Per Page ▾ • 1 - 30 < >

Tile Views : Tile View One ▾

Sort By None ▾ Asc ▾



**AU\$ 1,000,000.00**

11 Rowland Place, Jordan Springs, NSW 2747

Offer Won **Yes**

Off Market

Townhouse/Villa

Settled ✓



**AU\$ 1,000,000.00**

22 Marks Place, Jordan Springs, NSW 1000

Offer Won **Yes**

On Market

Commercial

Settled ✓



**AU\$ 23,000,000.00**

52 Archer Street, Chatswood, NSW 2067

Offer Won **No**

Off Market

Townhouse/Villa

Settled ✓

# Manage Every Acquisition Phase Seamlessly

*From initial buyer interest to final settlement, track each step with automated tasks and stakeholder coordination. Keep your acquisitions on time, on track, and fully aligned.*

Edit Clone Find and Merge Duplicates ... Delete

Acquisition Name Test 10Demo IP1  
Priority **Normal**  
Acquisition Type Investment  
Description -

**Phase** **STEP 4: DUE DILIGENCE**

Status Phase

Acquisition ● Step 4: Due Diligence ✓ ✕

- None-
- Step 1: Property Brief
- Step 2: Location Selection
- Step 3: Sourcing
- ✓ ● Step 4: Due Diligence
- Step 5: Settlement & Handover

Progress **50**

Offer Amount -

Mortgage Broker Name -

# Client Portal

*Give your buyers a premium experience with their own secure portal.  
They can see properties, documents, updates and next steps, without endless emails.*

- Secure buyer login
- Access to property lists, documents, and timelines.
- Automatic updates from your CRM. Live property shortlists
- Timeline and next steps
- Transparent, professional experience for buyers

The screenshot shows a web interface for creating a client. At the top right, there is a 'Portal User Type' dropdown menu set to 'Client Portal'. Below this is a navigation bar with 'Clients', 'Properties', and 'Acquisitions' tabs. The main heading is 'Create Client'. Under 'Client Image', there is a placeholder icon. The 'Client Information' section contains several input fields: a dropdown menu for 'Lead Source' (set to '-None-'), a checkbox for 'Email Opt Out', and text input fields for 'First Name', 'Last Name', 'Email', 'Secondary Email', and 'Mobile'. The 'First Name' field has a '-None-' dropdown on its left side.

# Reward & Track Referrals Effortlessly

*Referrals are powerful, but only if they are tracked properly.  
Every referral is an opportunity. Track who referred whom, and reward them, all without extra work.*

<span>All Tabs</span> <span>Home</span> <span>Leads</span> <span>Clients</span> <span>Accounts</span> <span>Deals</span> <span>Tasks</span> <span>Meetings</span> <span>Calls</span> <span>Reports</span> <span>Referral Deals</span> <span>Properties</span> <span>...</span> <span>+</span> <span>🔍</span> <span>🔔</span> <span>📅</span> <span>⚙️</span> <span>👤</span>										
<span>🔍</span> <span>All Referral Deals</span> <span>☰</span> <span>Create Referral Deal</span> <span>⌵</span> <span>Actions</span> <span>⌵</span>										
Total Records 28 <span style="float: right;">100 Records Per Page</span> <span>1 - 28</span> <span>&lt;</span> <span>&gt;</span>										
<input type="checkbox"/>	Referral Deal ...	All	Commission	Receivable Referral Commission	Payable Referral Commission	Payment Status	Created Time	Modified Time		
<input type="checkbox"/>	Patrick - Nish		<span>Get</span>	AU\$ 400.00	AU\$ 0.00	<span>Due</span>	Dec 6, 2025 04:30 PM	Dec 6, 2025 04:30 PM		
<input type="checkbox"/>	Patrick - Nish		<span>Pay</span>	AU\$ 0.00	AU\$ 200.00	<span>Due</span>	Dec 6, 2025 04:27 PM	Dec 6, 2025 04:27 PM		
<input type="checkbox"/>	Premi Singh Referred		<span>Get</span>		AU\$ 0.00	<span>Due</span>	Nov 12, 2025 03:25 PM	Nov 12, 2025 03:25 PM		
<input type="checkbox"/>	Premi Singh Referred		<span>Get</span>		AU\$ 0.00	<span>Due</span>	Nov 12, 2025 03:24 PM	Nov 12, 2025 03:24 PM		
...	<span>Muthumma's Deal (Amelia Carter)</span>		<span>Get</span>	AU\$ 0.00	AU\$ 0.00	<span>Due</span>	Nov 12, 2025 03:15 PM	Nov 12, 2025 03:18 PM		
<input type="checkbox"/>	Referred By Devi		<span>Pay</span>	AU\$ 0.00	AU\$ 100,000,000.00	<span>Due</span>	Oct 25, 2025 04:06 AM	Oct 25, 2025 04:06 AM		
<input type="checkbox"/>	Test 04.48 GET		<span>Get</span>	AU\$ 1,500.00	AU\$ 0.00	<span>Due</span>	Oct 18, 2025 04:48 PM	Oct 18, 2025 04:48 PM		
<input type="checkbox"/>	Test 18 OCT 2025 4.43 PAY		<span>Pay</span>	AU\$ 0.00	AU\$ 1,500.00	<span>Due</span>	Oct 18, 2025 04:44 PM	Oct 18, 2025 04:44 PM		
<input type="checkbox"/>	BenjaminKing Referral received		<span>Pay</span>	AU\$ 0.00	AU\$ 1,000.00	<span>Due</span>	Oct 18, 2025 04:43 PM	Oct 18, 2025 04:43 PM		
<input type="checkbox"/>	Test 18 OCT 2025 GET		<span>Get</span>	AU\$ 1,500.00	AU\$ 0.00	<span>Paid</span>	Oct 18, 2025 04:40 PM	Oct 18, 2025 04:40 PM		
<input type="checkbox"/>	Test 18 OCT 2025		<span>Pay</span>	AU\$ 0.00	AU\$ 1,000.00	<span>Due</span>	Oct 18, 2025 04:35 PM	Oct 18, 2025 04:35 PM		

# Multi-Channel Communication

***Communication is key. Let's make it effortless and automated.***

*Automate your emails, WhatsApp and SMS, so your buyers and partners always get the right updates at the right time.*

## ***Automated Emails:***

*Keep buyers, conveyancers, and brokers in the loop with timely, professional emails. Every step of the journey, communicated automatically.*

## ***WhatsApp & SMS:***

*Instant updates, reminders, and alerts straight to their phones. Powered by Twilio for reliability and reach.*

## ***All-in-One Dashboard:***

*Manage every message, see what's been sent, and track responses—all from a single place. No juggling multiple apps, no lost threads.*

# Digital Contracts & Signatures

*Contracts are sent, signed, and stored, all digitally. No printing, scanning, or chasing signatures.  
Everything tracked automatically.*

- Secure digital signing via Zoho Sign
- Auto-tracking of signed/pending documents.
- Organised document storage

Send with Zoho Sign

Send with Zoho Sign

START

Oct 3, 2025

CLOSING

Nov 21, 2025

Discovery Call Completed

Fee Negotiation

Contract Issued

Contract Signed

Issue Invoice

Retainer Paid / Won

Closed Lost

Deal Owner uat1

Stage Contract Signed

Closing Date Nov 21, 2025

## Document Information

Document Status Signed

Request ID 12384000000086093

Document ID 1A19114F9-VZEKF81T0SKLCEYNVBZ5BZJZOOMATBJQ8IJK1 EHIR4M

# Finance & Accounting Integration

*Keep your money clean and visible, without spreadsheets.*

*Invoices, fees, and commissions synced directly to your accounting tools. No manual updates, no errors just accurate records.*

- Integrates with Xero/Zoho Books
- Tracks invoices, payments, and commissions automatically

- Automatic updates for aligned operations
- Financial overview dashboard

START

Aug 26, 2025

CLOSING

Nov 28, 2025 

Discovery Call Completed

Fee Negotiation

Contract Issued

Contract Signed

Issue Invoice ▾

 Retainer Paid / Won Closed Lost

Deal Owner uat1

Stage **Issue Invoice**

Closing Date Nov 28, 2025

## Invoice Information

Invoice URL <https://books.zoho.com.au/app/7005845264#/invoices/235008000000210001>

Invoice Status Draft

e-Invoice URL <https://zohosecurepay.com.au/books/uatagenttime/secure?CInvoiceID=2-aabb012b61efb2b945b96ba1e62cae93025c464d4d378168d46dc82a68d015c681ae558b06bb465833d75b89832870417e4929950cba46420bfca7ffd90cab8611e80a707f5b3196>

Invoice Number INV-000030

Invoice ID 235008000000210001

# SUCCESS STORY



## Meet Alex! Overwhelmed Zoho Veteran:

A seasoned agent who has been paying for a Zoho One or CRM subscription for years but only uses it as a basic digital address book. Own system, feels too complex to actually set up properly, they compare features & struggle with the "DIY" mentality to miss out on the bigger picture.

Existing Zoho - Q2

### Problem:

- Paying for high license costs without seeing the ROI on execution.
- Stuck in a "DIY" loop where custom workflows are never finished.
- Manual data entry despite having "automation" tools available.

### Solution:

- Ready-made workflows vs. months of DIY configuration.
- Immediate activation of lead-to-nurture deal flows.
- Tailor made solution to scale their Buyer's Agency
- One stop shop system to manage end to end processes.



## Meet Chloe! Tech-Cautious Newcomer:

A fresh buyer agent or someone migrating from a completely non-digital background. Curious about automation but cautious and "fears migration" from their current simple habits. Fails to systematise delivery there by missed out of scaling the Business.

Newbie BA - Q3

### Problem:

- Uses disconnected systems or no system at all.
- Thinks they may not need a system yet.
- Needs real solutions to current problems but lacks the confidence to ask peers, don't know which systems to use.

### Solution:

- Guided, step-by-step onboarding feels safe and allows to learn nuances of system usage.
- Simple Tech with automations, solving real problems without "tech headache."
- Delivery systematised, feels guided by the system on next steps.

# SUCCESS STORY



## Meet George! The Solo Agent

A solo real estate agent spent his days buried in customising spreadsheets and building DIY solutions to track operations with no time left to focus on dollar making activities.

Instead of dollar making actions, his time was lost on managing tools

### DIY - Quadrant 1

#### Problem:

- Manually tracking every lead and follow-up
- Making calls, emails, WhatsApp, and SMS one by one Constantly switching between tools
- Scattered reminders and missed follow-up opportunities that stalled his growth.

#### Solution:

- Add the lead once in Agent Time Focus only on manual
- call follow-ups
- Automated email, WhatsApp, and SMS workflows
- Predefined templates for consistent communication



## Meet Sarah! The Growing Team Manager

A real estate team manager handling multiple agents and a high volume of leads every day.

Business was growing, but Sarah struggled to get a clear picture of what was actually happening inside the pipeline

### Switchers- Quadrant 4

#### Problem:

- Siloed information in various systems resulted in disjoint tracking of operations
- Lack of 360 visibility on deal & acquisition stages
- Overwhelmed by endless notifications across the systems.
- Follow-ups depended on agents' memory

#### Solution:

- Centralised all leads, deals, acquisitions & referrals
- Used pipeline stages to track every opportunity
- Activity Tracking for each agent
- Automated reminders for follow-ups

# Pricing

*Simple, transparent plans that scale as your agency grows.*

Compare Plans		
	PROFESSIONAL	Others
Agent Time Buyer's Agency Suite (Product Fee)	<b>\$2895 + GST</b> Soft Launch Offer <b>40% OFF</b> <b>(Only 5 slots available, filling fast)</b>	<b>Zoho Applications Free Tier</b> <b>(including Sign - Invoice)*</b>
Agent Time CRM license fee ( <b>Yearly</b> )	<b>\$58 per licence</b> (includes GST)	
Agent Time CRM license fee ( <b>Monthly</b> )	<b>\$68 per licence</b> (includes GST)	

# Q & A

QUESTIONS???