SADE CRM

USER GUIDE

How SADE CRM works

Everything you can do in SADE CRM, step by step, with examples. For agency admins, agents and developers.

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CHAPTER 1

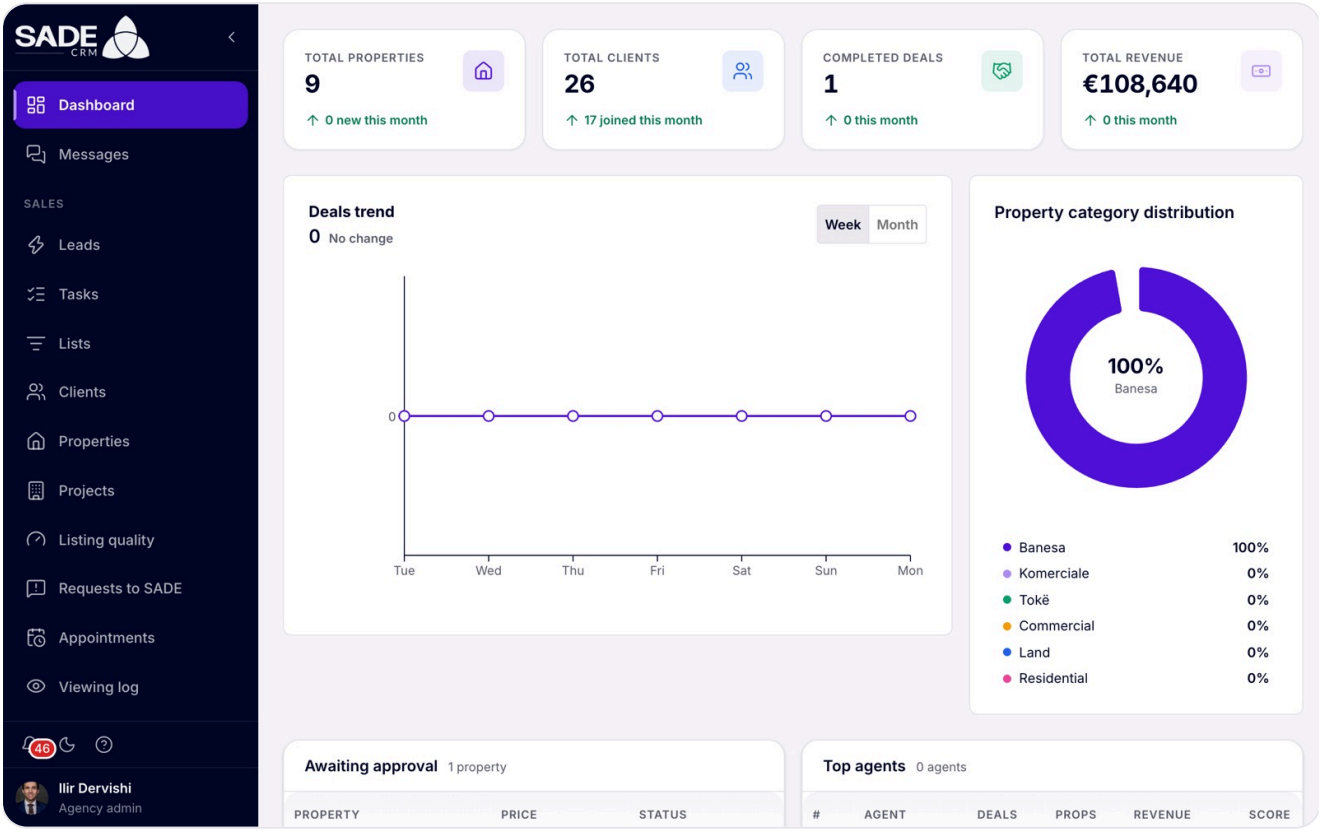
Getting started

Welcome to SADE CRM

What SADE CRM does, who it is for, and how to find your way around this guide.

SADE CRM is the system a real estate agency runs on. Every enquiry becomes a lead with a clock on it, every listing goes to the SADE marketplace once it is ready, and every viewing, deal and follow-up sits with the person it belongs to. Developers use the same CRM to sell new buildings unit by unit, with partner agencies, buyer payments and a read-only room for their bank.

This guide explains how all of it works, screen by screen, with examples taken from a demo agency. It describes what the CRM does today and nothing more.



The dashboard is the first page you see after signing in.

Who uses SADE CRM

Everyone signs in at crm.sadegre.com. What you see depends on your role.

Role	Who it is	What they can do
Agency admin	The person who signed the agency up, usually the owner or office manager.	Everything in the agency: the team, settings, lead routing, templates, reports, billing and verification.
Agent	Everyone else in the agency.	Their own leads and clients, the shared pond, listings assigned to them, viewings, deals and tasks.
Organization admin	Only on the Enterprise tier: someone who runs several agencies, such as a franchise head office.	The organization's agencies, people and reports, and the agencies' CRMs when the organization's access policy allows it.

A **developer** is a company that signed up as a developer instead of an agency. It has the same roles and the same CRM, with Projects moved to the top of the menu.

> **Note:** SADE's own staff check your registration documents and review listings before they go public. They can also open your CRM read-only, for example to help with a problem, and every time they do it shows on your SADE access page.

How the CRM is laid out

The menu on the left has three parts:

- **Sales**: the daily work. Leads, Tasks, Lists, Clients, Properties, Projects, Listing quality, Requests to SADE, Appointments, the Viewing log and Deals.
- **Team**: Agents, Promotions, Market prices and Reports. Agents see only some of these.
- **Settings**: shown to agency admins only. Lead routing, Action plans and Templates; the agency's profile, plan, verification, SADE access and Integrations; and Imports & feeds.

At the bottom of the menu are the bell (your notifications), the light and dark switch, the help button that replays the guided tour, and your name, which opens your profile and the sign-out button.

A day in SADE CRM

EXAMPLE

A buyer asks about a flat on the SADE marketplace at 10:02. The lead arrives in the CRM at once and the routing rules give it to Arta, who sells in that area. Arta gets a notification and the lead appears under **Waiting for you** with a timer.

Arta calls at 10:05 and logs the call, which stops the timer. The agency's action plan has already queued a WhatsApp message for two hours later, written from a template. The buyer books a viewing for Thursday, which goes on the calendar, and after the viewing Arta opens a deal. When the deal is completed the listing is marked sold and comes off the marketplace.

Finding your way around this guide

The guide follows the order you will meet things in:

1. **Getting started**: signing up, your first hour, signing in and verification.
2. **Your agency**: settings, the team, notifications, plans and billing.
3. **Leads and clients**: how leads arrive, who gets them and how to follow up.
4. **Listings**: adding, publishing and keeping listings in good shape.
5. **Viewings and deals**: the calendar, the viewing log, deals and reports.
6. **Projects for developers**: selling a new building with the CRM.
7. **The mobile app**, **Integrations**, **Enterprise** and **Security and help**.

Use the search box in the sidebar to jump to any topic (press `/` to focus it). To read the guide offline or print it, download it as a PDF with the button in the sidebar.

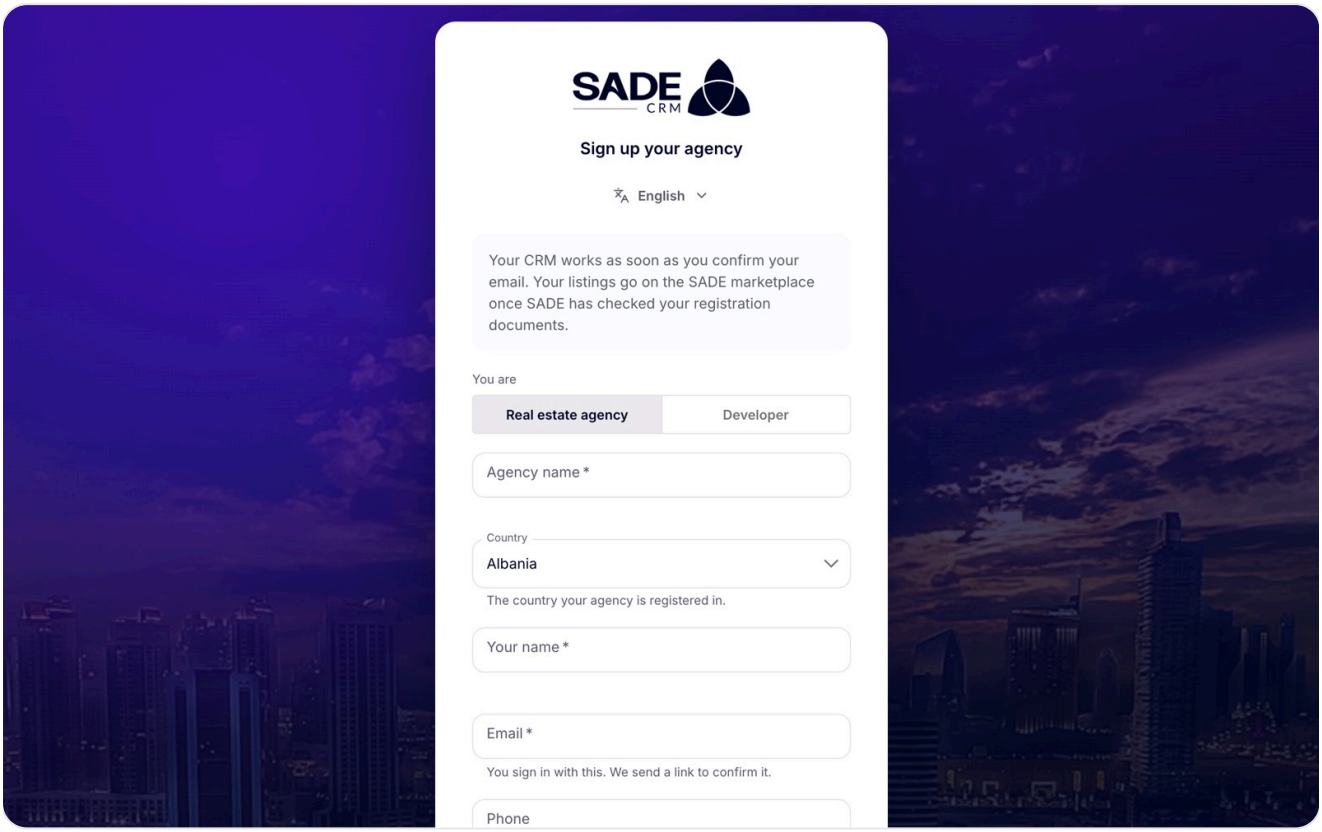
> **Tip:** the CRM speaks 11 languages. This guide is in English, and it quotes button and menu names as they appear in the English CRM. You can switch your CRM to English at any time from your profile to follow along.

Signing up your agency

How to create an account for your agency or development company, confirm your email and start the free trial.

You create your agency's account yourself, in a few minutes, at crm.sadegre.com/signup. Signing up creates three things at once: the agency, your own account as its **Agency admin**, and a 14-day free trial of a paid plan. No card or payment is asked for.

Your CRM works as soon as you confirm your email. Your listings go on the SADE marketplace later, once SADE has checked your registration documents (see Verification).



The sign-up form. The language switch at the top changes the language of the page.

Create your account

1. Go to crm.sadegre.com and click **Sign up your agency** under the sign-in card. You can also start from a plan's button on the pricing page.
2. Under **You are**, choose **Real estate agency** or **Developer**. Choose **Developer** if you build and sell new developments.
3. Fill in the form (see the table below).
4. Tick **I accept SADE's terms of service and privacy policy.** Both phrases are links, so you can read them first.
5. Click **Create account**.

The page changes to "Check your email" and tells you where the link was sent.

Field	What to enter
Agency name	Your agency's name, as customers know it. It is called **Company name** when you choose Developer. 2 to 200 characters.
Country	The country your agency is registered in. It sets your time zone, your currency and the documents SADE asks for. You can't change it later.
Your name	Your own full name.
Email	The address you will sign in with. SADE sends a link to it to confirm it.
Phone	Optional. Shown to SADE, not to the public. Write it in your country's usual format.
Password	At least 8 characters, with an uppercase letter, a lowercase letter, a number and a symbol. A checklist under the field ticks each rule as you type.
Language	The language of your team's CRM. It starts as the page's language. You can change it later.

> **Note:** one email address can have only one account. If you see "There is already an account with this email.", sign in instead, or use **Forgot password?**.

Confirm your email

You can't sign in until you have confirmed your email address.

1. Open the email "Confirm your email for SADE CRM" and click **Confirm email**.
2. The CRM opens and confirms the address by itself. When you see "Email confirmed", click **Sign in**.
3. Sign in with the email and password you chose. See Signing in.

The link works for 24 hours. If it has expired, the page says "This link doesn't work" and lets you ask for a new one.

If the email doesn't arrive

- Check your spam folder first.
- Click **Send the link again**. It is on the "Check your email" screen, on the page a broken link opens, and on the sign-in page if you try to sign in before confirming.
- After each send, the button waits 60 seconds before you can use it again. SADE sends at most 3 links an hour to one account.

SADE's emails about your account, such as the sign-up, verification, billing, password and listing emails, are in Albanian when your CRM language is Albanian, and in English for every other language. Viewing emails are written in all 11 CRM languages.

What you get

Your role	Agency admin: you can change everything in the agency, including the team, settings and billing. See Team and roles.
Your plan	A 14-day free trial of the plan you picked on the pricing page. If you came straight to the sign-up page, the trial is of the Growth plan. If you came from an invitation to sell another agency's project, the trial is of Pro, so you can accept it. See Plans and billing.
Time zone and currency	Set from your country, for example Europe/Tirane and EUR for Albania. You can change both in Agency settings.
Marketplace	Nothing of yours is public until SADE has verified the agency. See Verification.

Developers

A company that signs up as a **Developer** gets the same CRM, with **Projects** moved to the top of the menu. The form shows "Developers start on a free trial of Pro, the plan with projects." Developers always get a plan with projects, whichever plan the link named. See Projects overview.

Messages you may see

Message	What to do
“This email already has an account.”	Sign in, or reset your password with **Forgot password?**.
“That phone number doesn’t look right.”	Check the number against your country’s format, or leave the field empty.
“The password doesn’t meet the rules below.”	Add whatever the checklist under the password still shows as missing.
“Accept the terms to continue.”	Tick the terms box.
“SADE doesn’t work in that country yet.”	Your country isn’t one of SADE’s 24 markets yet.
“Too many sign-ups from this network. Try again in a few minutes.”	Wait a few minutes and try again.

Tip: you sign up on the web only. The phone app has no sign-up screen: create the account in a browser first, then sign in on the app with the same details.

EXAMPLE

Ilir Dervishi runs Tirana Living Real Estate, an agency in the Blloku area of Tirana. On Monday at 09:00 he opens the pricing page, clicks the Growth plan’s button and lands on the sign-up form.

He leaves **Real estate agency** selected, types “Tirana Living Real Estate”, keeps **Albania** as the country and enters his work email and mobile number (069 123 4567). He picks Shqip as the language, ticks the terms and clicks **Create account**.

The confirmation email arrives a minute later, in Albanian because he chose Shqip. He clicks the button, sees “Email confirmed” and signs in. His agency is on a Growth trial for 14 days, its clock is set to Europe/Tirane and its currency to EUR. The next thing he does is send his NUIS and documents for verification.

Your first hour

A suggested order for an agency admin's first hour in SADE CRM, from the agency's profile to the first listings and leads.

You have signed up, confirmed your email and signed in. This page suggests what to do next, in an order that works for most agencies. It takes about an hour, and you can stop at any point: nothing here has to be done in one sitting.

The CRM has no checklist that ticks these off for you. It does have a short guided tour of the dashboard, which opens the first time you sign in. Take it if you like: it takes about a minute, and you can reopen it later from the **?** icon at the bottom of the menu.

Every step below is for the **Agency admin**. Agents can't open the settings pages.

Fill in your agency's profile

Open **Settings**, then **Agency**.

- Upload your logo and check the agency name.
- Add the public email, phone, website, city and office address. Buyers see these on the marketplace, on your agency's page and on your listings.
- Check the time zone and currency, which were set from your country, and the **CRM language** your team's CRM starts in.

See Agency settings.

Send your verification documents

Open **Settings**, then **Verification**. Enter your business number and upload your registration documents, then click **Send for checking**.

Do this early. Your listings can't go on the marketplace until SADE has verified the agency, and the check takes SADE some time. Your CRM works fully in the meantime.

See Verification.

Add your agents

Open **Team**, then **Agents**, and click **Add agent** for each person. You choose each agent's first password, so tell them it yourself: the CRM doesn't email them an invitation.

Have each agent's photo, email, mobile number, age and city to hand: the form needs all of them. Your plan sets how many agents you can have. You, the agency admin, don't count.

See Team and roles.

Decide who gets new leads

Open **Settings**, then **Lead routing**.

- Set **Contact new leads within**: how many minutes your agents have to contact a new lead. It starts at 5.
- Choose where a lead goes when no rule matches: to the agent of the listing it's about, or to the shared pond.
- Add rules if some leads should go to particular agents, for example rentals to one agent and sales in Tirana to another.

See Lead routing.

Bring your listings in

You have two ways to start:

- **Many listings at once:** open **Settings**, then **Imports & feeds**, and import a spreadsheet, or connect a feed from your current software. Until SADE has verified your agency, imported listings also wait for SADE's review. See Imports and feeds.
- **A few listings:** open **Properties** and add them one by one. See Adding a listing. A listing you add by hand waits for SADE's review before it is published. See Review and publishing.

Set up your follow-up

These are optional on day one, but they save your agents time from the first lead:

- **Templates**: the emails, WhatsApp messages and SMS texts your agents send most often. See Templates.
- **Action plans**: a timed list of follow-up steps that become tasks for the agent, for example a call at once and a WhatsApp message two hours later. See Tasks and action plans.

Connect your website

If your agency has its own website, open **Settings**, then **Integrations**, and add a website form. Enquiries from your site then arrive in the CRM as leads, the same as marketplace leads. See Website forms.

Check your trial

Open **Settings**, then **Plan & billing**. It shows your plan, "Trial until" and the end date, and how many agents and listings you use. Choose a plan before the trial ends to keep the CRM open. See Plans and billing.

After the first hour

- **Your agents** sign in with the details you gave them, add a photo in their profile, and check that **Taking new leads** is on at the top of the Leads page. See Signing in and Leads.
- **The phone app:** SADE sends you the download link for the SADE CRM app. Agents sign in with the same details as on the web. See The mobile app.

EXAMPLE

Ilir signs Tirana Living Real Estate up at 09:00 on Monday and is in the CRM by 09:05. He skips the guided tour for now.

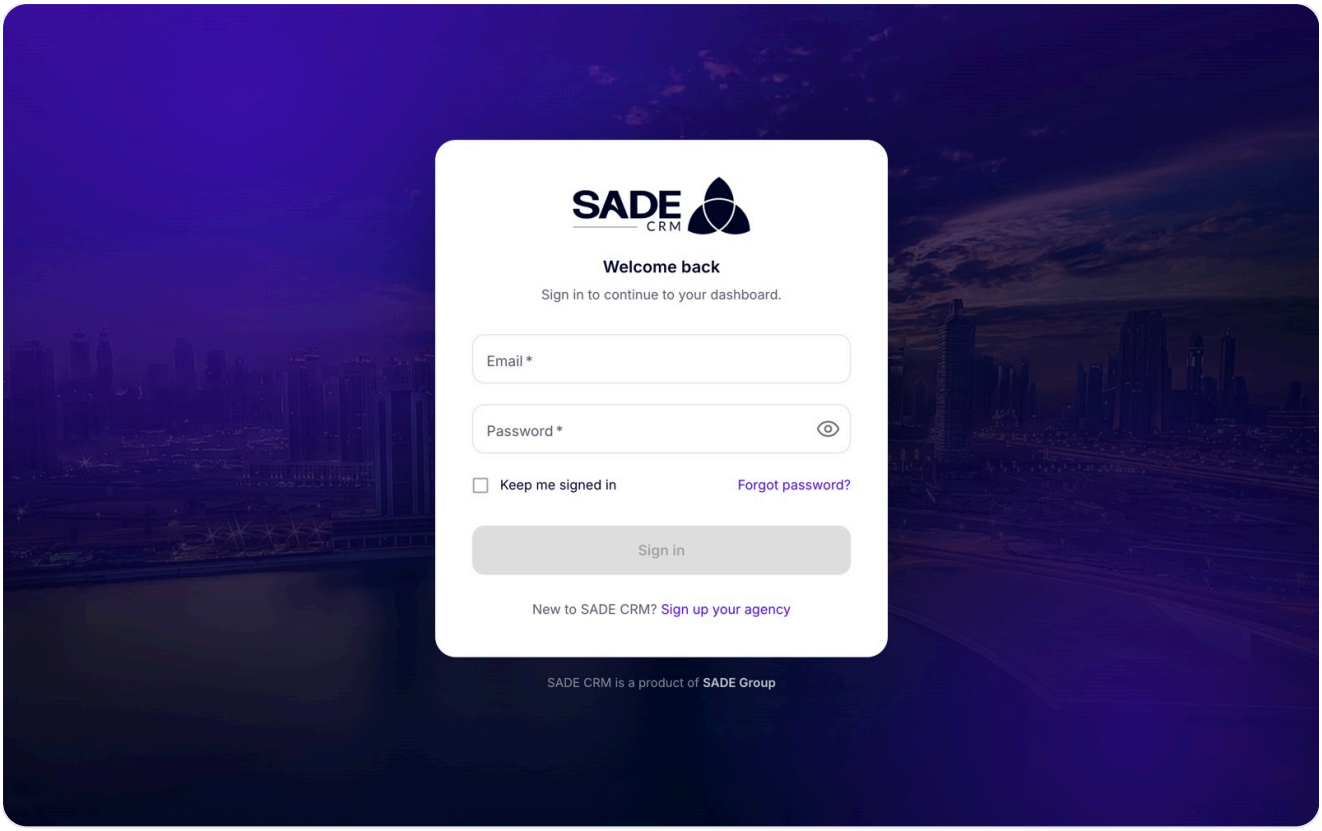
By 09:10 the logo, the office address on Rruga Ismail Qemali and the public phone are in **Agency settings**. At 09:20 he has sent the NUIS and the QKB extract for verification. By 09:30 Arta Krasniqi, Besnik Leka and Erjona Hasani have accounts, and he has sent each of them their first password on WhatsApp.

In **Lead routing** he keeps the 5-minute target and adds one rule: every rental lead goes to Erjona. At 09:45 he imports the agency's 60 listings from the spreadsheet he used before. SADE hasn't verified the agency yet, so they wait as **Pending** for SADE's review, like listings added by hand. At 10:00 he opens **Plan & billing**, notes that the trial ends in 14 days, and leaves choosing a plan until the team has tried the CRM.

Signing in and your account

Signing in and out, how long you stay signed in, forgotten passwords, changing your password, your profile, language and theme.

Everyone in an agency signs in at crm.sadegre.com with their email and password: agency admins, agents and organization admins alike. This page covers signing in and out, passwords, and the things each person sets for themselves: their profile, their language and light or dark mode.



The sign-in card. New agencies sign up from the link at the bottom.

Sign in

1. Go to crm.sadegre.com.
2. Enter your **Email** and **Password**. The eye icon shows the password as you type.
3. Tick **Keep me signed in** if this is your own computer.
4. Click **Sign in**. The CRM shows “Signed in.” and opens your dashboard.

If you signed your agency up yourself, you must confirm your email before the first sign-in. Agents added by their agency admin don’t need to confirm anything: they sign in with the details the admin gives them.

How long you stay signed in

Choice	How long it lasts
Keep me signed in ticked	7 days, even if you close the browser.
Keep me signed in not ticked	Until you close the browser, and at most 12 hours.

While you work, the CRM renews your access in the background, so you are not interrupted mid-task. If you have the CRM open in several tabs, signing out in one signs you out in all of them.

Sign out

1. Click your name at the bottom of the menu.
2. Click **Log out**.

This ends your session on this device and in the browser's other tabs. Other devices stay signed in until their own session ends, or until you change your password.

When sign-in fails

Message	What it means
"Invalid email or password"	The email or password is wrong, or the account has been removed from the agency.
"Confirm your email first: open the link we sent when you signed up."	You signed up but haven't confirmed your email yet. Click **Send the link again** for a new link.
"Account locked after too many failed attempts. Try again later."	Five wrong passwords in a row lock the account for 5 minutes. Wait, or reset your password.
"Too many attempts. Please try again after 5 minutes."	Too many sign-in attempts came from your network. Wait 5 minutes.
"Can't reach the server. Check your connection and try again."	Your device is offline.

Forgotten password

1. On the sign-in card, click **Forgot password?**.
2. Enter your email and click **Send reset link**.
3. Open the email "Reset your password" and click its link. The link works for one day.
4. On "Set a new password", type the new password in **New password** and again in **Confirm new password**. The same rules apply as at sign-up: at least 8 characters, with an uppercase letter, a lowercase letter, a number and a symbol.
5. Click **Update password**. The sign-in card shows "Password updated. Sign in with your new password."

The CRM always answers "If that address belongs to an account, a reset link is on its way.", whether or not the address has an account. If nothing arrives, check your spam folder before you ask for another link.

Resetting your password signs you out on **every** device, clears any lock on the account, and sends you an email "Your password was reset". If you get that email and didn't reset your password, tell

your agency admin at once.

> **Note:** if the page says “This reset link is no longer valid. Request a new one.”, the link has expired or a newer one replaced it. Ask for a new link.

Change your password

When you know your current password:

1. Click your name at the bottom of the menu, then **Profile**.
2. Click **Change password**.
3. Fill in **Current password**, **New password** and **Confirm new password**.
4. Click **Change password**.

You are signed out on every device, including this one (“Password changed. Sign in again with your new password.”), and you get an email confirming the change. Sign in again with the new password.

An agency admin can also set a new password for an agent from the Agents page. See Team and roles.

Your profile

Click your name at the bottom of the menu, then **Profile**. The page shows your photo, name, username, email and role, an **Overview** card with your account details, and a **Subscription** card with your agency’s plan.

To change your details, click **Edit profile**:

Field	What to enter
Photo	Shown on your listings and your agency’s page. PNG, JPG or WebP, up to 5 MB. It saves as soon as you upload it.
Full name	Your name as buyers see it. 2 to 120 characters.
Phone	Your work number. Buyers who ask for it see it.
Email	Greyed out: you sign in with this address. If you are an agent, your agency admin can change it on the Agents page.

Click **Save**. The CRM shows “Profile saved.” A new name or photo also appears on your listings on the marketplace.

Language

The CRM speaks 11 languages: English, Shqip, Italiano, Español, Português, Français, Deutsch, Ελληνικά, Български, Slovenščina and Română.

1. Click your name at the bottom of the menu.
2. Click **Language** and pick one.

The choice is kept in this browser. On another computer, or until you pick one, the CRM opens in your agency’s **CRM language**, which the agency admin sets in Agency settings. In the phone app, change the language from the **More** screen.

> **Note:** SADE’s emails and bell notifications are in Albanian or English: Albanian when your agency’s CRM language is Albanian, English otherwise, whatever language you choose. That includes the password emails. Viewing emails are written in all 11 languages.

Light and dark mode

Click the moon icon at the bottom of the menu to switch to dark mode, and the sun icon to switch back.

The guided tour

The first time you open the dashboard in a browser, the CRM offers a short guided tour of the dashboard. Click **Start tour**, or **Skip for now**. To see it again later, click the **?** icon at the bottom of the menu.

EXAMPLE

Erjona Hasani is an agent at Tirana Living Real Estate. She signs in on her own laptop with **Keep me signed in** ticked, so she stays signed in all week.

On Thursday she shows a flat in Komuna e Parisit from the office computer and signs in there without ticking the box. When she closes the browser that evening, that session ends.

On Saturday she wants to check her leads from the family computer at home, but she can't remember her password. She clicks **Forgot password?**, sets a new one from the email, and signs in with it. Her laptop is signed out too, so on Monday she signs in there with the new password. While she is in the CRM, she opens **Profile**, then **Edit profile**, and adds a photo so it shows on her listings.

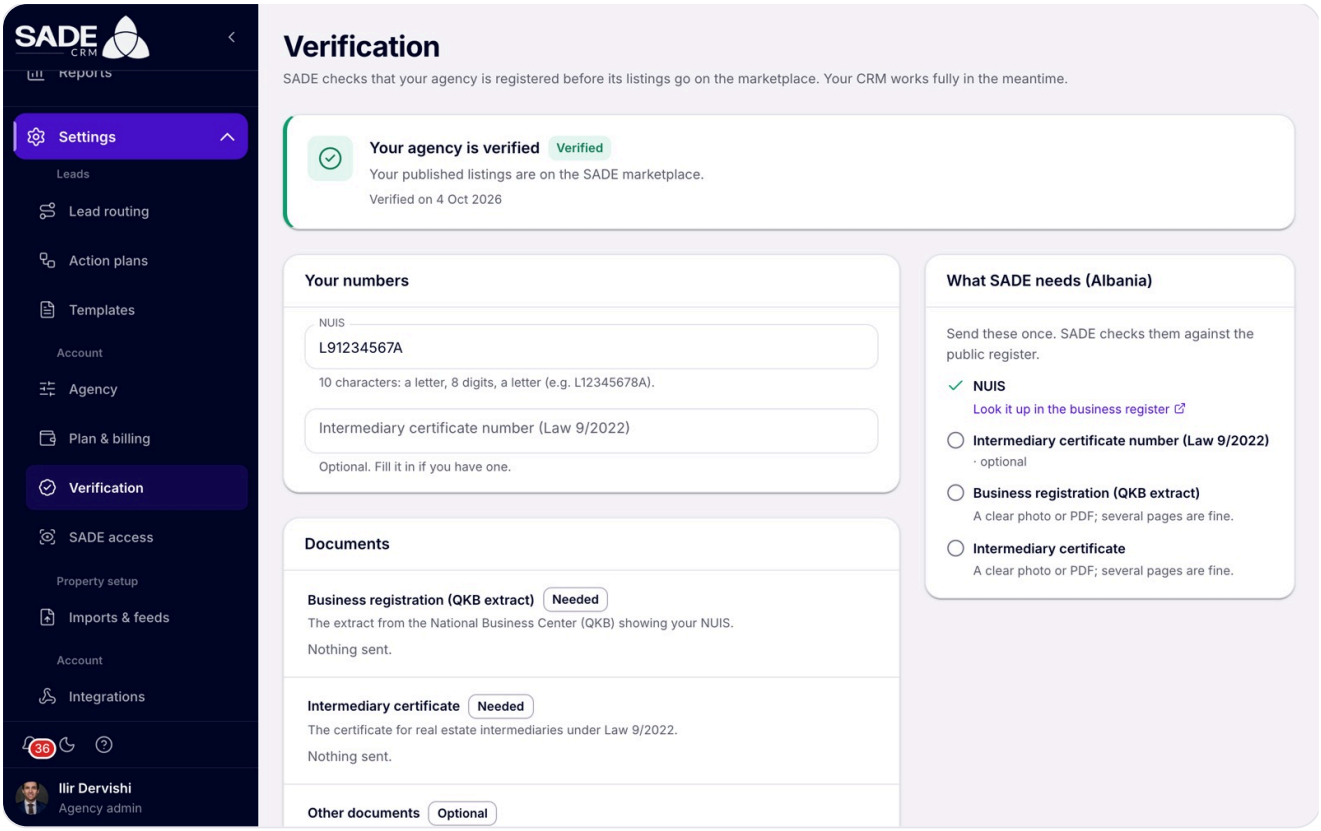
Verification

How your agency proves it is a registered business, what SADE needs in each country, and what changes once you are verified.

Before anything of yours appears on the SADE marketplace, SADE checks that your agency is a registered business. You send your business number and a few documents from the **Verification** page, and SADE checks them against the public register.

Your CRM works fully while you wait: you can add listings, take leads and book viewings from the first day. Until SADE has verified the agency, though, none of its listings, projects or its agency page are on the marketplace, and it can't buy promotions.

Only the agency admin sends the documents. Agents see the status in a banner, but not the documents.



A verified agency. The right-hand card lists what SADE needs in your country.

Send your documents

1. Open **Settings**, then **Verification** (under **Account**). You can also click **Send documents** in the banner at the top of the page.
2. Read the card **What SADE needs** on the right. It names your country and lists the numbers and documents you need. Where your country has an online business register, the link **Look it up in the business register** opens it.
3. Under **Your numbers**, enter your business number. Its name depends on your country, for example **NUIS** in Albania. If your country also has a licence number for agents, you can enter it too. Each number shows “Saved” once it is stored.
4. Under **Documents**, drop your files on the box, or click it to choose them. Each kind of document shows **Needed**, **Optional** or **Added**.
5. When everything is in, click **Send for checking**.

The status changes to **Being checked**. You can’t change your numbers or documents while SADE is checking them.

> **Tip:** a clear photo taken with your phone is fine, and several pages of one document can be separate files.

Statuses

Status	What it means
Not verified	You haven’t sent anything yet. Your listings aren’t on the marketplace.
Being checked	SADE is checking your documents. SADE emails you when it’s done.
Verified	“Your published listings are on the SADE marketplace.” The page shows the date.
Not accepted	SADE couldn’t verify the agency. The page shows **SADE’s note** saying why. Fix what it says and send again.

What SADE needs in your country

Every country needs a business registration extract and your business number. Albania also needs the intermediary certificate.

Country	Business number	Documents needed
Albania	NUIS: 10 characters, a letter, 8 digits and a letter (e.g. L12345678A)	Business registration (QKB extract) and the intermediary certificate (Law 9/2022)
Italy	Partita IVA	Chamber of Commerce extract (visura camerale)
Kosovo	NUI (ARBK)	Business registration extract
Montenegro	PIB	Business registration extract
North Macedonia	EMBS	Business registration extract
Greece	ΑΦΜ	Business registration extract
Every other country	The number on your registration, under its local name	Business registration extract

The licence number, where your country has one, is optional. Fill it in if you have one. **Other documents** are always optional.

Rules for files

- Photos (JPEG, PNG or WebP) or PDFs, up to 10 MB each.

- Up to 20 documents for the agency in all. To add more, remove one first.
- Only your agency's admins and SADE's moderators can open the documents. They have no public link.
- Photos are re-saved when you upload them, which removes hidden camera data such as the place the photo was taken.

To remove a file, click the remove button next to it and confirm "Remove {name}?". SADE won't see it any more. You can add and remove files only while the status is **Not verified** or **Not accepted**.

If **Send for checking** answers "Some documents are missing.", the message lists what is still needed. If it says "Check your numbers above first.", your business number is missing or doesn't match your country's format.

After you send

- SADE's moderators are told at once that your agency is waiting.
- When they decide, every agency admin gets an email and a notification that links back to this page.
- Once you are verified, your published listings and projects go on the marketplace. Your agency also gets its own agency page there, from its first public listing.

To change your details after verification, contact SADE. Your agency's name is locked from then on too, because SADE verified you under it (see Agency settings).

> **Important:** SADE can later suspend a verified agency, for example if its registration is no longer valid. The status goes back to **Not accepted** with a note, and the agency's listings leave the marketplace until it is verified again.

The banner your team sees

Until the agency is verified, a banner at the top of every page says so:

Status	Agency admin sees	Agents see
Not verified	“Your listings aren’t on the marketplace yet. Send SADE your registration documents to get verified.” with **Send documents**	“The agency’s listings aren’t on the marketplace yet: SADE hasn’t verified the agency. Your agency admin needs to send its documents.”
Being checked	“SADE is checking your documents. Your listings go on the marketplace once you are verified.”	
Not accepted	“SADE couldn’t verify your agency, so your listings aren’t on the marketplace:” followed by SADE’s note, with **Fix and send again**	

You can close the banner for the rest of the session. It comes back when the status changes.

The phone app shows the same message on its Home screen, but documents can be sent only from the CRM on the web.

> **Note:** an agency created by an Enterprise organization starts verified and doesn’t send documents. See Organizations.

EXAMPLE

On his first morning, Ilir opens **Verification** for Tirana Living Real Estate. The card on the right reads **What SADE needs (Albania)**.

He types the agency’s NUIS, L91234567A, and it shows “Saved”. He leaves the intermediary certificate number empty, because it is optional. Under **Documents** he drops a PDF of the QKB extract and two phone photos of the intermediary certificate. Both kinds now show **Added**, and he clicks **Send for checking**.

The banner changes to “SADE is checking your documents.” Meanwhile Arta and Besnik keep adding listings. When SADE verifies the agency, Ilir gets an email and a notification, the status turns **Verified**, and every listing SADE has approved goes on the marketplace.

CHAPTER 2

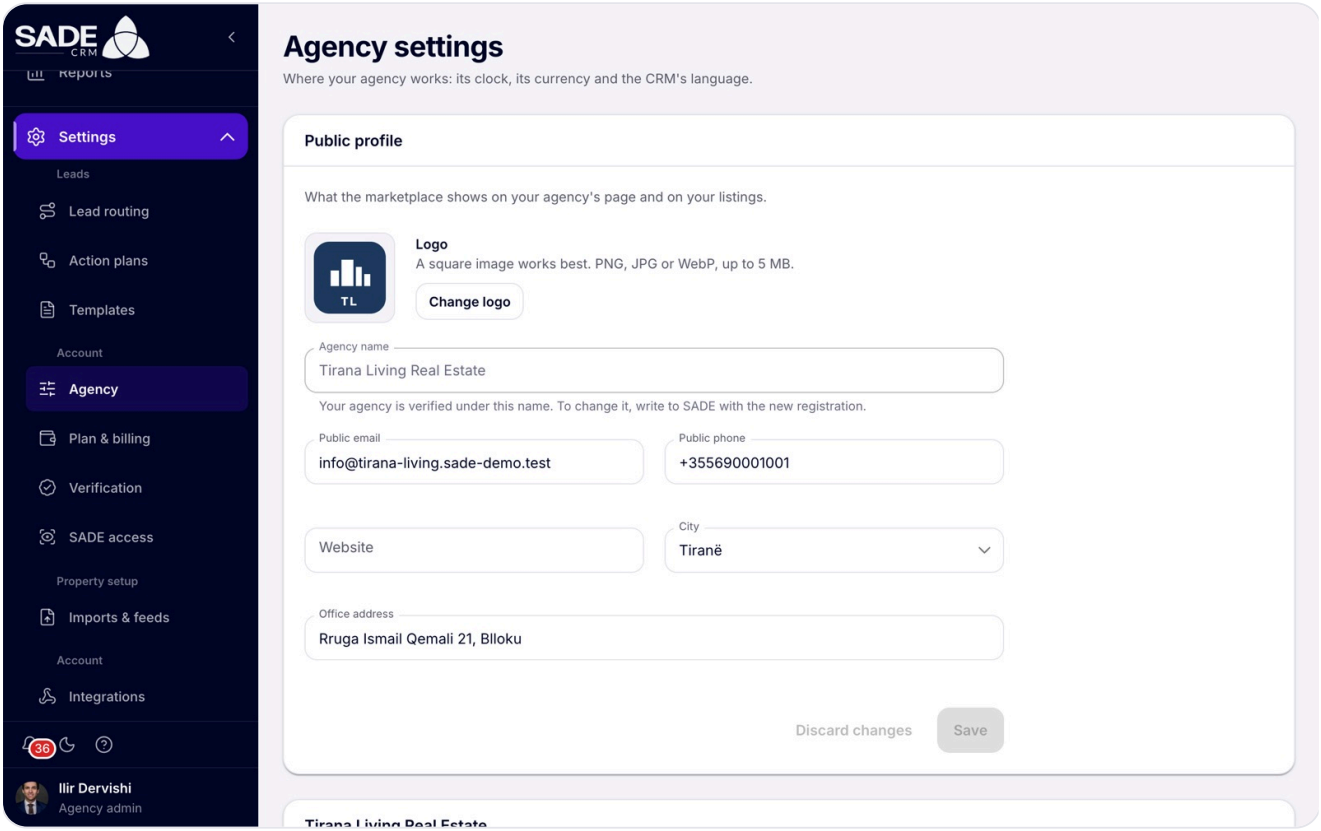
Your agency

Agency settings

Your agency's public profile, its time zone, currency and CRM language, and the SADE access log of every time SADE looked inside your CRM.

The **Agency settings** page holds two things: what the marketplace shows about your agency, and how your CRM works day to day (its clock, its currency and its language). Only the agency admin can open it. Open **Settings**, then **Agency** (under **Account**).

This page also covers **SADE access**, the record of every time SADE's staff looked inside your CRM.



The public profile of a verified agency. The name is locked because SADE verified the agency under it.

Public profile

"What the marketplace shows on your agency's page and on your listings."

Field	What to enter
Logo	A square image works best. PNG, JPG or WebP, up to 5 MB. Click **Upload logo** or **Change logo**. The logo saves at once (“Logo updated.”).
Agency name	Your agency’s name, 2 to 120 characters. Locked once SADE has verified the agency (see below).
Public email	The address buyers can write to.
Public phone	The number buyers can call.
Website	Your own website, if you have one, for example www.example.al.
City	Pick your city from the list.
Office address	The street and area of your office.

Click **Save**. The CRM shows “Profile saved.” **Discard changes** puts back what was saved before.

Changing a verified agency’s name

Once your agency is verified, the name field is locked and says “Your agency is verified under this name. To change it, write to SADE with the new registration.” Send SADE the registration that shows the new name, and SADE changes it for you.

How your CRM works

The second card carries your agency’s name as its title.

Setting	What it does
Time zone	Decides when “today” starts for tasks and reports. It starts as your country’s time zone, for example Europe/Tirane. The help text shows the current offset from UTC.
Currency	Used in reports. Pick one from the list or type any three-letter code, for example EUR.
CRM language	The language your team’s CRM starts in. Each person can switch to another language in their account menu (see Signing in). It also decides the language of SADE’s emails and bell notifications to your agency’s people, the password emails included: Albanian if it is Albanian, English otherwise. Viewing emails are written in all 11 languages: your team gets them in this language, and clients in their own when the CRM knows it.

Click **Save**. The CRM shows “Agency settings saved”.

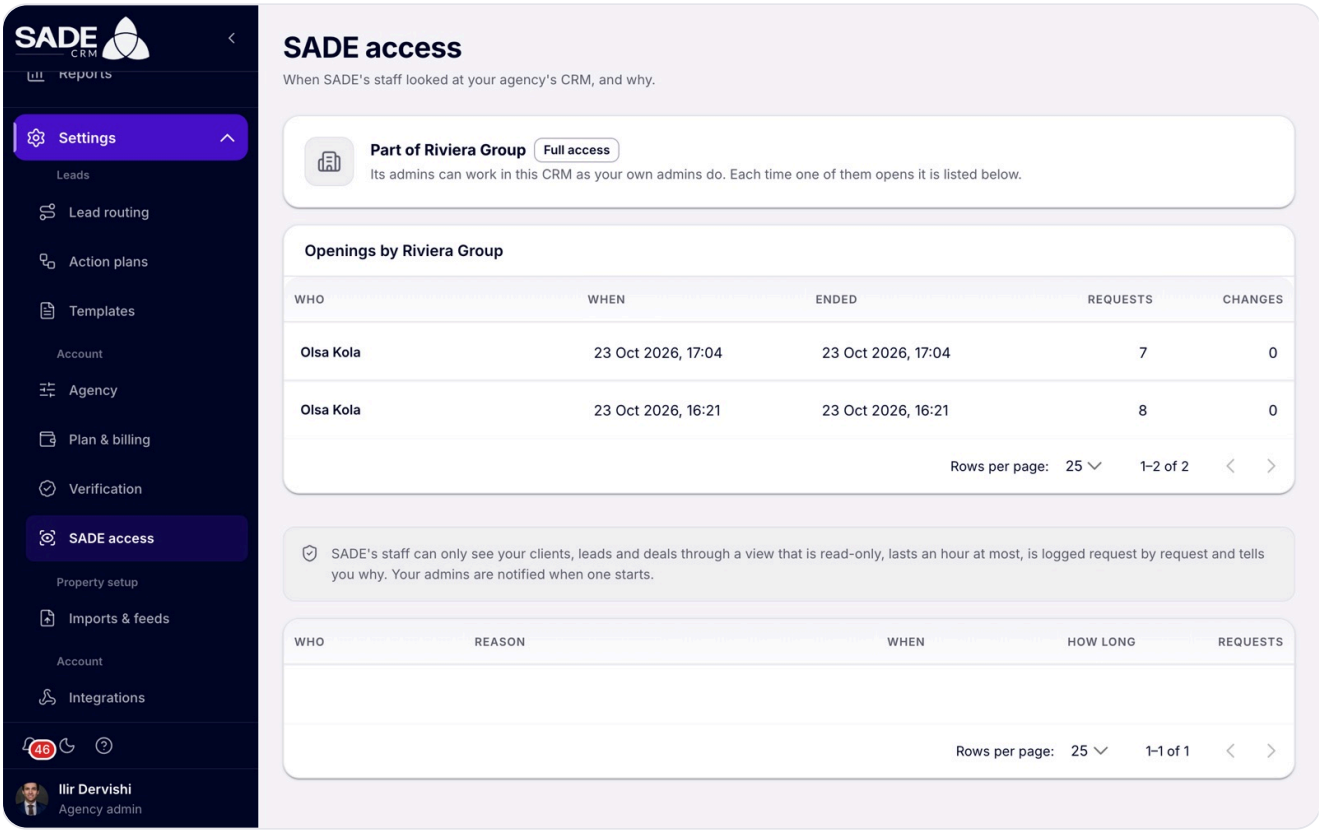
What you can’t change here

- **Country** and the choice between **agency** and **developer** are set at sign-up and can’t be changed from the CRM.
- How fast agents must contact new leads is set in Lead routing.
- How long a project unit can be held is set on each project. See Holds and sales.

SADE access

SADE’s staff check your registration documents and review listings before they go public. They do not see your clients, leads, deals, appointments, tasks, lists, templates, routing, imports, integrations, reports, settings or billing in the normal course of their work. The only way they can look at those is a **view as agency**, and every view is shown to you on the **SADE access** page.

Open **Settings**, then **SADE access** (under **Account**). Only agency admins see it.



An agency that belongs to an organization sees the organization’s openings above SADE’s own views.

How a SADE view works

When someone at SADE needs to look inside your CRM, for example because you asked for help with a lead:

Rule	What it means for you
A reason, every time	They must write why they are looking, in 5 to 500 characters. You read that reason.
Read-only	They see your CRM as your admin does, but they can’t change anything. Any change is refused.
One hour at most	The view ends on its own after an hour.
Logged	Every request they make during the view is logged, one by one.
You are told	Every agency admin gets a notification “SADE is viewing your CRM” with the person’s name and reason, at the moment the view starts.

A SADE view works even if your plan has ended, so SADE can still help you.

The log

Each row of the log shows:

Column	What it shows
Who	The SADE staff member.
Reason	The reason they wrote.
When	When the view started.
How long	“Under a minute” or the number of minutes.
Requests	How many requests they made during the view.

A view still running shows **Open now**. If SADE has never looked, the page says “SADE hasn’t looked at your CRM”.

If your agency is part of an organization

An agency inside an Enterprise organization also sees, at the top of the page, a card “Part of” the organization with its access level, and a log “Openings by” the organization. That log lists each time one of the organization’s admins opened your CRM, with **Who**, **When**, **Ended**, **Requests** and **Changes**. The organization’s openings don’t send you a notification; they appear only here. See Organizations.

Note: what SADE can see without a view is the platform side of your account: your agency's details, your verification documents, and your listings and projects, which SADE reviews before they go public.

EXAMPLE

Arta tells Ilir that a lead from the marketplace shows the wrong source, and Ilir writes to SADE about it.

At 19:36, Ilir's bell rings: "SADE is viewing your CRM", with the name of the person at SADE and their reason, "The agency asked us to check a lead's source." He opens **SADE access** and sees the view listed as **Open now**.

The next morning the row shows **How long** "1 minute" and 31 requests. Nothing in the CRM was changed, because the view was read-only. SADE writes back with the answer.

Team and roles

The two roles in an agency and what each can see, adding and editing agents, resetting their passwords, seat limits and removing an agent.

Everyone in your agency has one of two roles: **Agency admin** or **Agent**. The agency admin runs the agency's CRM and manages the team from the **Agents** page. Agents work on their own leads, clients, listings and deals.

The person who signed the agency up is its agency admin. Everyone the admin adds from the Agents page is an agent.

What each role can see and do

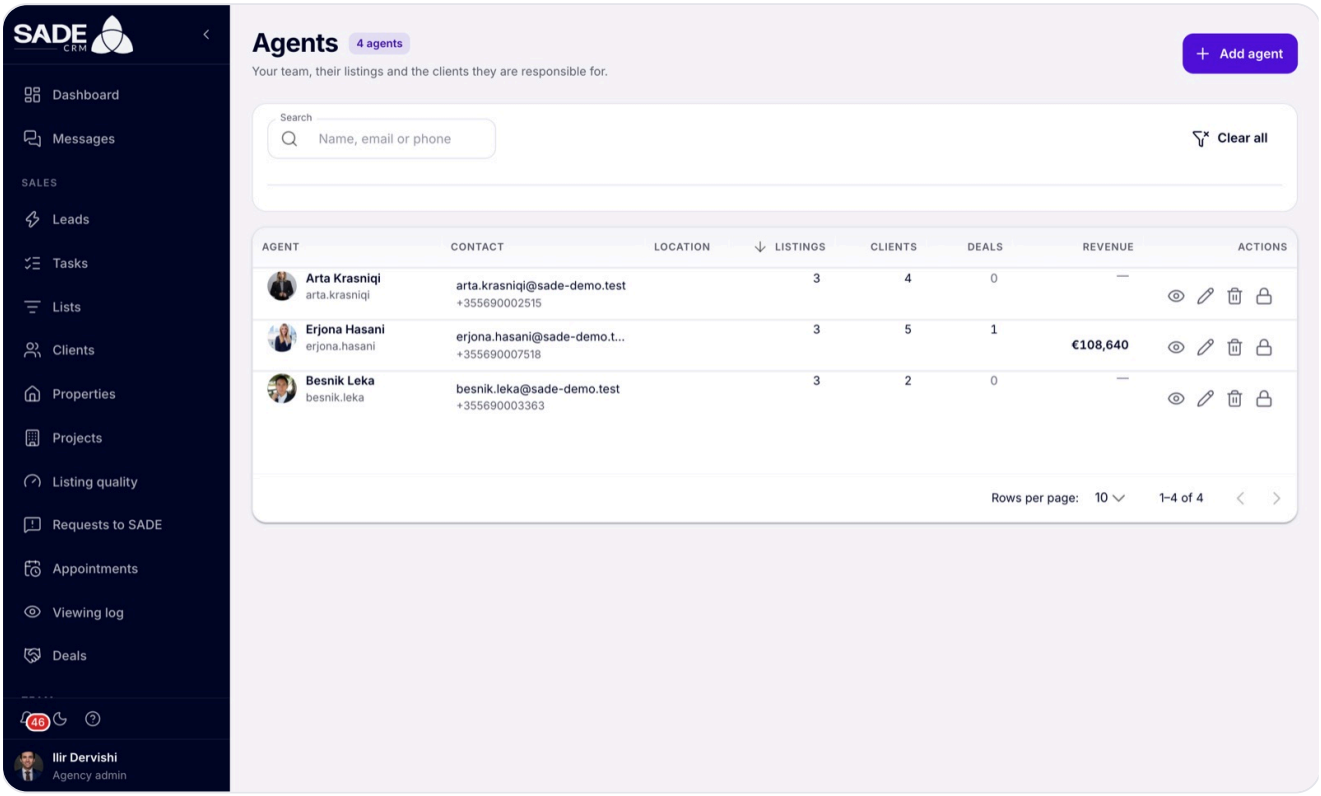
Area	Agency admin	Agent
Leads	Every lead in the agency, including **Everyone's uncontacted leads**.	Their own leads, leads offered to them, and the shared pond.
Clients	Every client of the agency.	Clients assigned to them or that they added, and clients linked to their listings, viewings or deals.
Properties	Every listing of the agency.	Listings assigned to them.
Appointments and **Viewing log**	Everyone's.	Their own.
Deals	Every deal.	Deals where they are the agent.
Tasks	Everyone's. Can give tasks to agents.	Their own.
Lists	Can share a list with the whole agency.	Their own lists. On a shared list, they see only their own people and the pond.
Projects	Creates and edits projects.	Sees every project and works with its units (holds and sales), but can't create or edit a project.
Promotions	Buys and pays.	Sees the page, can't buy.
Market prices	Yes.	Yes.
Agents and **Reports**	Yes.	No.
Settings (lead routing, action plans, templates, agency, plan and billing, verification, SADE access, integrations, imports)	Yes.	No. The whole Settings menu is hidden.

The details of each area are on its own page, for example Leads, Clients and Deals.

> **Note:** an **Organization admin** is a third role, only on the Enterprise tier. It belongs to an organization above several agencies, not to an agency. See Organizations.

The Agents page

Open **Team**, then **Agents**. Only agency admins see it.



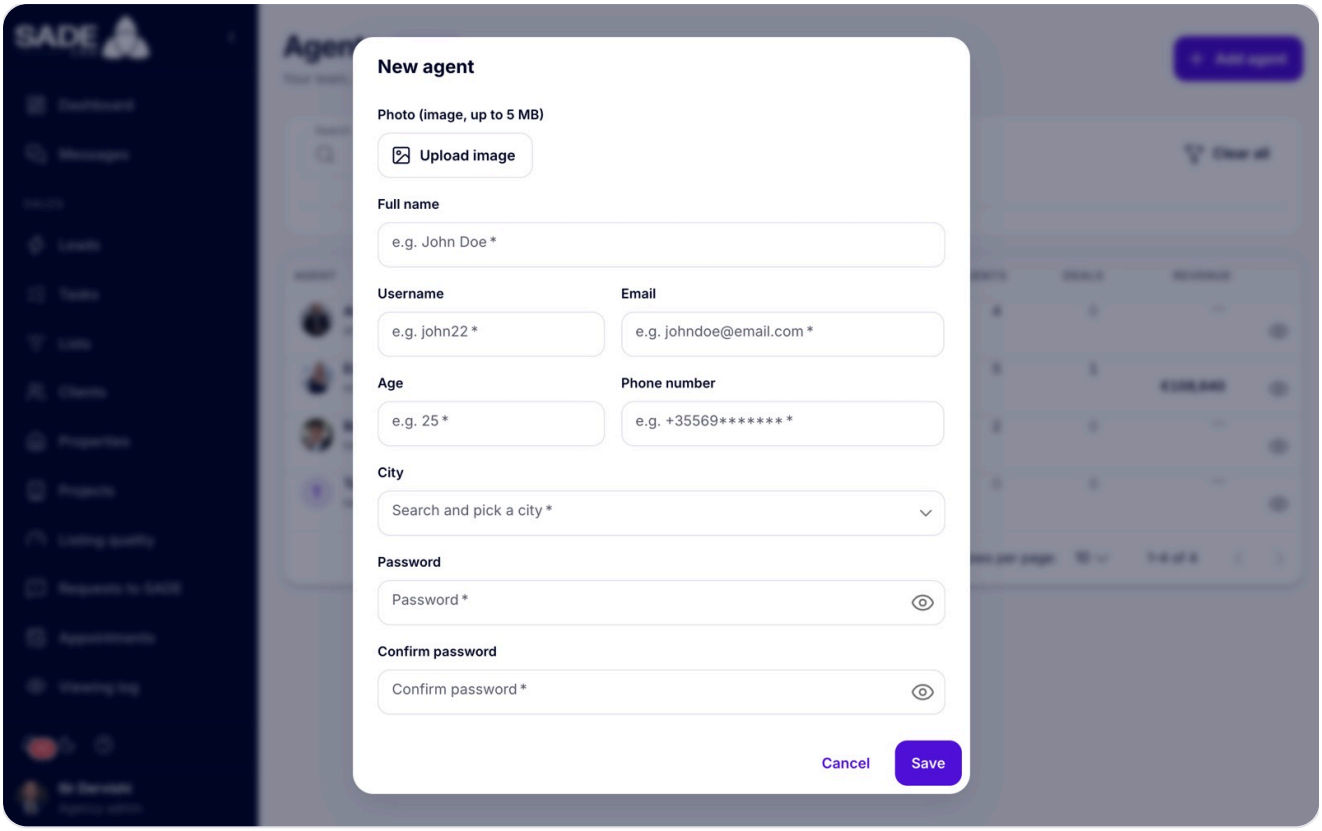
The Agents page. Search by name, email or phone.

Each row shows the **Agent**, their **Contact** details, **Location**, and their numbers of **Listings**, **Clients** and **Deals**, with their **Revenue** from completed deals. The icons at the end of the row let you view the agent's profile, edit them, delete them, or change their password.

The page lists active agents only. Agency admins, including you, are not on it.

Add an agent

1. On the Agents page, click **Add agent**.
2. Fill in the **New agent** form (see the table).
3. Click **Save**. The CRM shows "Agent added."
4. Tell the agent their username or email and the password you chose.



Field	What to enter
Photo (image, up to 5 MB)	A photo of the agent. Required. It appears on their listings.
Full name	The agent's name, as buyers will see it.
Username	A short name for signing in, unique in SADE CRM. Spaces become underscores.
Email	The agent's own email. It must not already have an account.
Age	The agent's age.
Phone number	The agent's work number, 7 to 15 digits. It must not already be used by another account.
City	Search and pick the city they work in.
Password and **Confirm password**	The agent's first password: at least 8 characters, with upper and lower case letters, a number and a symbol.

> **Important:** the CRM doesn't email the new agent. You choose their first password, so give it to them yourself, and ask them to change it from their profile after the first sign-in (see Signing in).

A new account is always an agent. Agents don't need to confirm their email: they can sign in straight away.

Edit an agent

Click the pencil icon on the agent's row. The form "Edit" followed by the agent's name lets you change the photo, **Full name**, **Username**, **Email**, **Age**, **Phone number** and **City**. Click **Save changes**. The CRM shows "Agent updated."

This is also where you change an agent's sign-in email.

Reset an agent's password

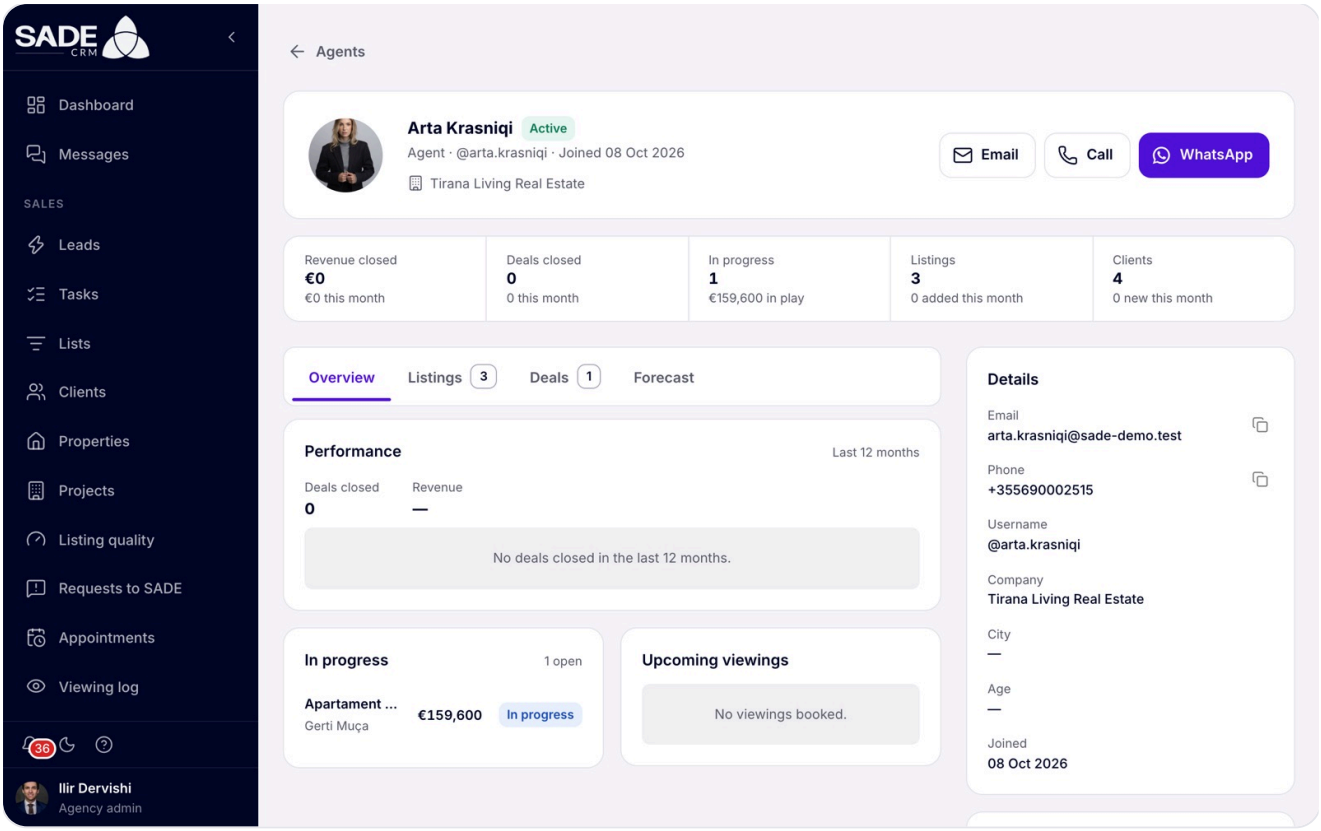
If an agent forgets their password, they can reset it themselves with **Forgot password?** on the sign-in card. You can also set a new one for them:

1. Click the lock icon on the agent's row.
2. Enter the **New password** and type it again in **Confirm password**.
3. Click **Save**. The CRM shows "Password changed."

The agent is signed out on all their devices and gets an email that their password was changed. Your own session is not affected.

An agent's profile

Click the eye icon on an agent's row to open their profile.



An agent's profile, as the agency admin sees it.

The top shows whether the agent is **Active**, when they joined, and buttons to email, call or WhatsApp them. Under it are their numbers, then four tabs:

Tab	What it shows
Overview	**Performance** over the last 12 months, deals **In progress** and **Upcoming viewings**.
Listings	The listings assigned to them.
Deals	Their deals, filtered by in progress, closed, or rejected and cancelled.
Forecast	What the agent is likely to close this month, compared with their usual month.

Only agency admins can open agent profiles on the web. See Dashboard and reports for the agency's numbers as a whole.

Seat limits

Your plan sets how many agents your agency can have. The limits of each plan are on the pricing page.

- Only active agents take a seat. Agency admins don't count.
- An agent you delete frees their seat at once.

- When every seat is taken, **Add agent** is refused with “Agent limit reached.” Delete an agent, or move to a larger plan in Plans and billing.
- Your plan’s listing limit works the same way: at the limit, a new listing is refused with “Property limit reached.”
- **Plan & billing** shows how many agents and listings you use, against your plan’s limits.

An agency inside an Enterprise organization counts against the organization’s contract instead. See Organizations.

Remove an agent

When an agent leaves the agency:

1. Give their work to someone else first: reassign their listings, clients and leads to other agents.
2. On the Agents page, click the bin icon on their row.
3. Confirm “Delete this agent?”. The CRM warns: “They can no longer sign in. This can’t be undone.”

What happens:

- Their account is closed and taken out of your agency. Their sessions are ended and they can no longer sign in.
- They get an email that their account was removed.
- Their seat is free for someone new.
- Their listings, clients and deals stay in your agency. They are **not** moved to anyone else by this step, which is why you reassign them first.

You can’t bring a removed agent back yourself. If someone returns, contact SADE: only SADE can reopen a removed account.

A second agency admin

The Agents page adds agents only. If your agency needs a second agency admin, contact SADE. In an Enterprise organization, the organization’s admins can add agency admins themselves.

On the phone app

Agency admins can see the Agents list and each agent’s profile in the phone app, under **More**. Adding, editing and removing agents, and resetting their passwords, are done on the web.

EXAMPLE

Tirana Living hires a fourth agent, Dritan Shehu, who will cover Kombinat and Don Bosko. Ilir opens **Agents**, clicks **Add agent**, uploads Dritan's photo, and enters his name, the username "dritan.shehu", his email, his age, his mobile number and Tiranë as his city. He types a first password and clicks **Save**. Then he tells Dritan the password in person, and Dritan changes it after his first sign-in.

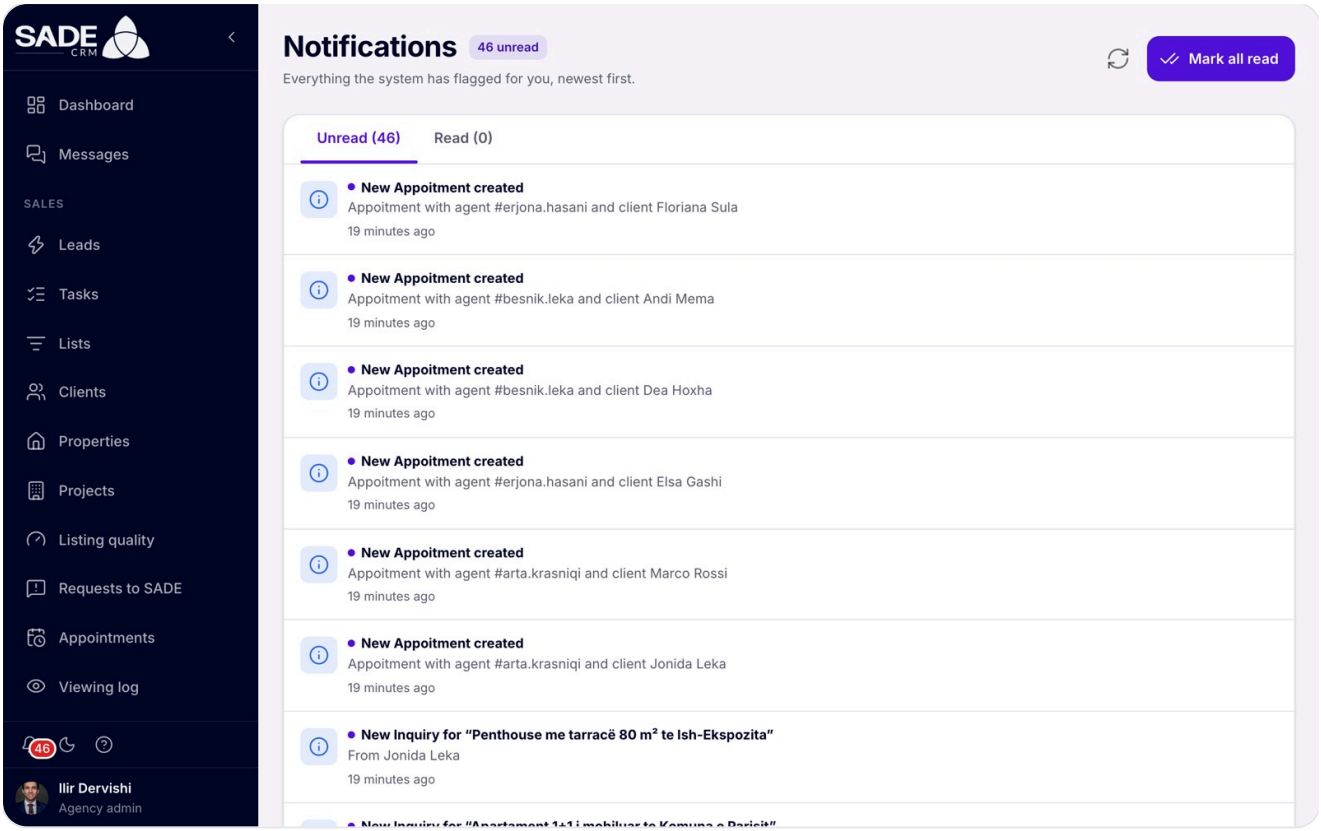
Six months later Besnik Leka leaves. Ilir reassigns Besnik's three listings to Arta and his client to Erjona, then deletes Besnik from the Agents page. Besnik can no longer sign in, and his seat is free for the next hire. The deals Besnik closed stay in the agency's records.

Notifications

The bell, the Notifications page, what the CRM tells you about, and which emails SADE sends.

The CRM tells each person what needs their attention: a new lead, a lead nobody has called, a listing about to expire, a decision from SADE. Notifications are personal, so each agent and admin sees their own.

They arrive in the bell at the bottom of the menu as they happen, without reloading the page. The **Notifications** page keeps all of them, newest first. Notifications keep working even when your agency's plan has ended.



The Notifications page. Each row links to the client, listing or page it is about.

The bell

The bell sits at the bottom of the menu. Its red badge shows how many notifications you haven't read.

1. Click the bell to open the latest notifications.
2. Click one to open what it is about, for example the client's page. Opening it marks it as read.
3. Click **Mark all read** to clear the badge, or **View all notifications** to open the full page.

When there is nothing new, the bell says "You're all caught up".

The Notifications page

Open it from **View all notifications** in the bell. The page has two tabs, **Unread** and **Read**, each with its count.

- Click a notification to open what it is about.
- **Mark as read** on a row moves it to the Read tab.
- **Delete notification** removes it from your list.
- **Mark all read** at the top marks every unread notification as read.
- The refresh icon fetches the latest. **Load more** at the bottom shows older notifications.

What you are notified about

Some common notifications, and who gets them:

When	Who gets it	Example
A new lead is given to an agent	The agent	“New lead: Elira Gjoni”
A lead is offered to several agents, first to claim	Each agent it is offered to	“Claim this lead: Elira Gjoni”
A lead goes to the pond	Agents taking new leads, and agency admins	“New lead in the pond: Elira Gjoni”
A lead is still waiting for a first contact	The lead’s agent	“Elira Gjoni has waited 15 min”
Nobody has contacted a lead in time	Agency admins	“No one has contacted Elira Gjoni”
Someone asks about a listing	Agency admins	“New Inquiry for” and the listing’s title
SADE approves a listing	The listing’s agent	“SADE approved “Apartament 2+1 në Bllok””
SADE doesn’t approve a listing	The listing’s agent, or the agency admins if it has none	“SADE didn’t approve “Apartament 2+1 në Bllok”“, with SADE’s reason
A listing will come off the marketplace in 7 days unless confirmed	The listing’s agent, or the agency admins	“Confirm your listing”
A listing came off the marketplace because it wasn’t confirmed	The same	“Listing taken off the marketplace”
A partner agency accepts an invitation or reserves a unit in your project	The project’s agency	“Adriatik Homes reserved Rezidenca Liqeni · T-901”
SADE decides on your verification	Agency admins	The decision, with a link to **Verification**
SADE starts a read-only view of your CRM	Agency admins	“SADE is viewing your CRM”
A plan payment didn’t go through	Agency admins	A link to **Plan & billing**

The pages on lead routing, listing quality and partners explain when each of their notifications is sent.

> **Note:** notifications are in Albanian when your agency's CRM language is Albanian, and in English for every other language, whatever language you use the CRM in.

Emails

Besides the bell, SADE sends emails for these events:

Email	Who gets it
Confirm your email	The person who signed the agency up.
Reset your password, and "Your password was reset"	The person resetting their password.
Password changed	A person whose password was changed, by themselves or by their agency admin.
Account removed	An agent the agency admin removed.
Verification decided (verified, not accepted or suspended)	The agency admins.
A plan payment didn't go through	The agency admins and the billing email. At most once every 12 hours.
Listing about to expire, or expired	The listing's agent, or the agency admins.
Listing not approved by SADE, with the reason	The listing's agent, or the agency admins if it has none.
A viewing is booked	The viewing's agent, and the client if they have an email address and the viewing is Pending, Confirmed or Rescheduled.
Reminder before a viewing	The viewing's agent.
Invitation to set your password	A person an Enterprise organization invites.

SADE's emails are in Albanian when your agency's CRM language is Albanian, and in English otherwise. That includes the password emails. Viewing emails are the exception: they are written in all 11 CRM languages, in your agency's CRM language, and the client gets theirs in their own language when the CRM knows it. See What happens when you book.

Choosing what you receive

There are no notification settings: everyone gets the notifications that apply to their role, and you can't turn a kind off. Use **Mark all read** to clear the ones you have dealt with.

The CRM in the browser shows notifications only inside the CRM. It doesn't send desktop or browser notifications, so keep a CRM tab open during working hours if you take leads.

On the phone app

The SADE CRM app has the same notifications. A bell with the unread count sits at the top of each screen, and tapping a notification opens the client or listing it is about. See The mobile app.

EXAMPLE

At 10:02 a buyer asks about a 2+1 flat on Rruga e Durrësit. The routing rules give the lead to Arta, and her bell shows "New lead: Elira Gjoni". She is with another client and doesn't answer.

At 10:07 Arta's bell shows "Elira Gjoni has waited 5 min". Arta calls at 10:09 and logs the call, so the reminders planned for 15 and 60 minutes never come. Ilir, the agency admin, gets no "No one has contacted" notification either: the agency tells admins only after 30 minutes without a contact.

At the end of the day Arta opens the Notifications page and clicks **Mark all read**.

Plans and billing

The free trial, the Plan & billing page, paying with PayPal or by bank transfer, changing or cancelling a plan, and what happens when a plan ends.

Every agency runs on a plan. The plan sets how many agents and listings the agency can have, and whether it has projects. The plans, their prices and their limits are on the pricing page.

Only the agency admin chooses the plan and pays, from the **Plan & billing** page. Agents can see the page but not change it: it tells them "Only your agency's admin can change the plan or pay."

The free trial

A new agency starts on a 14-day free trial of a paid plan. No card is needed to start. A developer's trial is always of a plan with projects, and so is the trial of an agency that signs up from an invitation to sell another agency's project.

- **Plan & billing** shows the status **Trial** and "Trial until" with the end date.

- In the last 7 days of the trial, a blue banner on every page reminds the agency admin: “Your free trial ends on {date}. Choose a plan to keep using the CRM.” Agents see that their admin can choose a plan. You can close the banner for the rest of the session.
- You can choose a plan at any time during the trial.

The banner is the only reminder: no email is sent when the trial is about to end.

The Plan & billing page

Open **Settings**, then **Plan & billing** (under **Account**). The page has four parts.

Your plan shows the plan’s name and price, its status, and its next date: “Renews on”, “Trial until”, “Paid until” or “Canceled: ends on”. Two bars show how many **Agents** and **Listings** you use against the plan’s limits.

Status	What it means
Trial	The free trial is running.
Active	The plan is paid.
Payment overdue	PayPal couldn’t take the last payment and is trying again. The plan keeps running for now.
Ended	The plan has ended. Most of the CRM is closed. See When a plan ends.
No plan	The agency has no plan. Treated like Ended.
Free	A free plan, with no end date, where SADE offers one.

Plans lists the plans you can buy. Switch between **Monthly** and **Yearly** at the top. Each card shows the price, the agent and listing limits, and whether it includes projects. Your current plan is marked **Current**.

Billing email is where SADE sends payment notices. Leave it empty to use your agency’s email. PayPal sends its own receipts to the PayPal account that pays.

Payments lists every payment, newest first: what it was for (**Plan** or **Promotion**), the amount, its status, how it was paid, the dates, and PayPal’s reference. The CRM doesn’t produce invoices of its own.

Choose a plan and pay with PayPal

Online payments go through PayPal, as a subscription that renews by itself.

1. Open **Plan & billing**.
2. Under **Plans**, choose **Monthly** or **Yearly**.
3. Click **Choose** on the plan you want.
4. The dialog “Subscribe to” the plan shows its price and limits. Approve the subscription with PayPal’s buttons in the dialog. If they don’t load, click **Continue to PayPal** and approve it on PayPal’s own page.
5. Back in the CRM, wait for “Confirming your subscription with PayPal...”. Then you see “Subscribed. Your agency is on” followed by the plan’s name.

PayPal charges the plan automatically every month or every year until you cancel.

If you see	What it means
“PayPal hasn’t confirmed the subscription yet.”	PayPal can take a few minutes. Refresh the page later. If you were charged and your plan doesn’t change, contact SADE.
“You left PayPal without subscribing. Nothing was charged.”	You closed PayPal before approving. Try again when you are ready.

The card or PayPal account you pay with is managed in PayPal. Click **Payment method in PayPal** to change it.

Change your plan

While you pay with PayPal, each other plan card shows **Switch to this plan**, and your own plan offers **Switch to monthly** or **Switch to yearly**.

1. Click the switch button you need.
2. Approve the new price on PayPal’s page and come back to the CRM.
3. The CRM shows “PayPal approved the change. The new price is charged from your next payment.”

You can’t move to a plan that is too small for what you use today. The card explains why: it shows how many agents and listings your agency has, and how many the plan allows. Remove agents or listings first. Nothing is ever deleted for you.

Cancel your plan

1. Under **Your plan**, click **Cancel plan**.
2. Optionally, tell SADE why in **Why are you cancelling? (optional)**.
3. Click **Cancel plan** to confirm, or **Keep my plan** to go back.

PayPal stops charging at once. Your plan keeps running until the end of the period you have paid for, and then it ends (see When a plan ends). Nothing is deleted.

Pay by bank transfer

You can also pay SADE by bank transfer, in any currency, including lek. Write to SADE at support@sadecrm.com. Once the transfer arrives, SADE records it, and your plan runs until the date you paid for. The payment appears under **Payments** with the method **Bank transfer**.

When a payment fails

If PayPal can't take a renewal, it tries again over the following days.

- The status changes to **Payment overdue**, and the card says until when the plan keeps running. It runs until 7 days after the end of the last paid period.
- Each agency admin gets a notification and an email, and so does the billing email. They come at most once every 12 hours, with a link to PayPal.
- A banner tells the admin: "The last payment for your plan didn't go through. Fix it in PayPal by {date} to keep the plan." with **Pay now**.

Fix the card or account in PayPal and the plan carries on. If the payment never goes through, the plan ends.

When a plan ends

If the trial or a paid plan ends without payment, **most of the CRM closes**. Your data is kept: nothing is deleted.

While the plan is ended:

- These still work: signing in and out, **Plan & billing**, your notifications, and changing your password.
- Everything else (leads, clients, listings, deals, settings) is closed until a plan is paid.
- A red banner on every page says "Your agency's plan has ended, so most of the CRM is closed." The admin's banner has **Choose a plan**. It can't be closed.

To open the CRM again, choose a plan and pay with PayPal, or pay by bank transfer. Everything is back as it was.

Where SADE offers a free plan, SADE may move an agency whose plan has ended onto it instead.

Agencies billed through an organization

An agency inside an Enterprise organization doesn't pay SADE itself. Its **Plan & billing** page says "Billing is handled by" followed by the organization's name: "there is no plan to choose or pay for here." It shows when the organization's contract runs until, and **What your agency uses** (agents and listings). See Organizations.

EXAMPLE

Tirana Living Real Estate signed up for a Growth trial on 2 November. On 9 November a blue banner appears for Ilir: "Your free trial ends on 16 Nov 2026."

On 12 November Ilir opens **Plan & billing**, picks **Yearly**, clicks **Choose** on Growth and approves the subscription in PayPal. The page shows "Subscribed. Your agency is on Growth.", the status **Active** and a renewal date a year ahead.

A year later the agency's card has expired, and the renewal fails. The status turns **Payment overdue**, and Ilir gets an email and a notification. He updates the card through **Payment method in PayPal**, PayPal takes the payment on its next try, and the plan carries on. Arta and Besnik keep working throughout.

CHAPTER 3

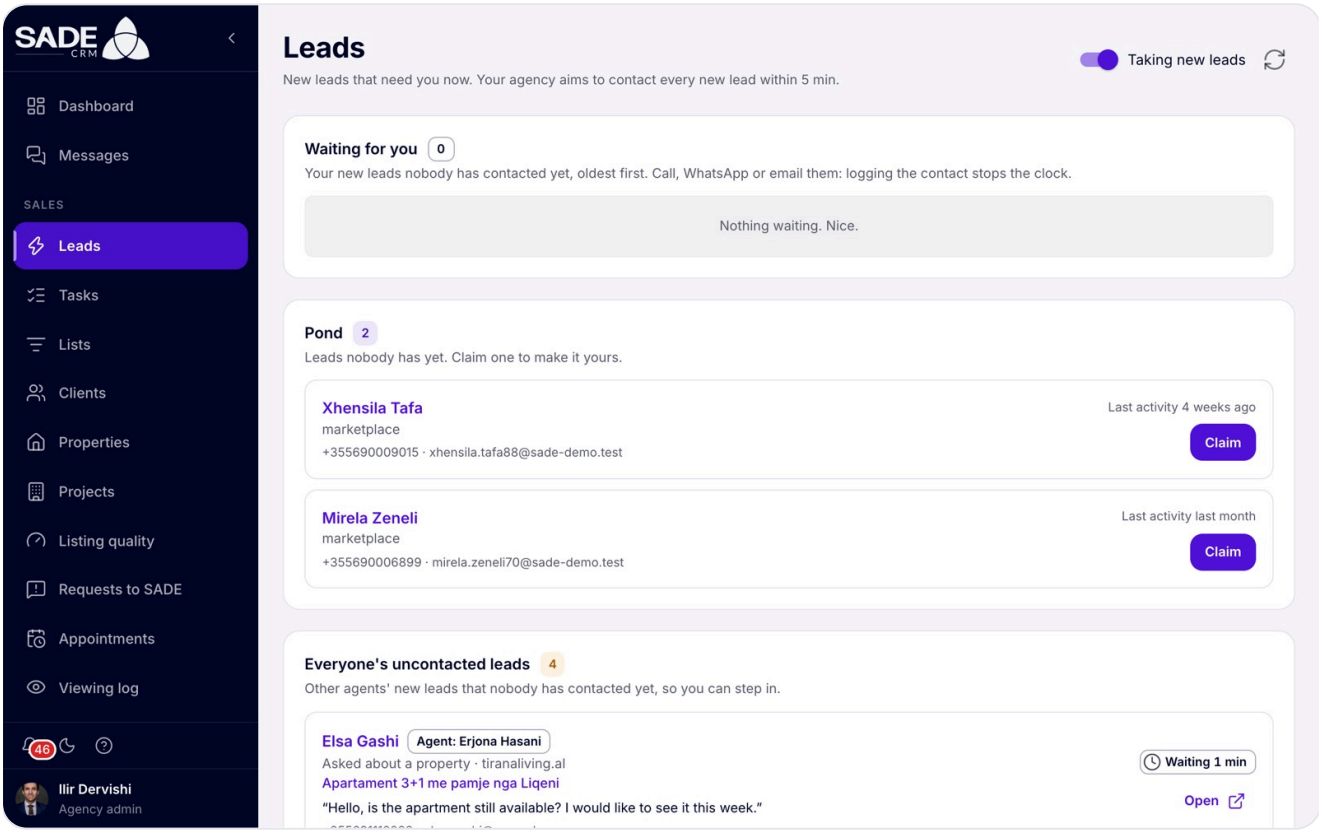
Leads and clients

Leads

Where leads come from, the lead stages, the Leads page and its timers, claiming leads from the pond, and what counts as answering a lead.

A lead is a person who has asked your agency for something: a question about a listing, a request for a viewing, a call, a sign-up. Every lead lands in SADE CRM with a clock running, and the **Leads** page shows each agent the leads that need them now, most urgent first.

Agents and agency admins both use the Leads page. Agents see their own leads and the shared pond. Agency admins also see every other agent's leads that nobody has contacted yet, so they can step in. Open it from **Sales → Leads** in the menu.



The Leads page as Ilir, the agency admin. Erjona's lead from the agency's website has been waiting one minute.

Where leads come from

Every enquiry, from any source, goes through the same steps. The CRM looks for the person in your agency by email, then by phone. If it finds them, the enquiry is added to their record; if not, it

creates a new client. It then decides who gets the lead (see Lead routing), starts the response clock and notifies the right people.

Where the lead comes from	What shows as its source
A message, viewing request, or the Call or WhatsApp button on one of your listings on the SADE marketplace (sadegre.com)	**SADE Marketplace**
A message to your agency on the SADE marketplace, not about a listing	**SADE Marketplace**
An enquiry about one of your projects on the SADE marketplace (only when your plan includes projects)	**SADE Marketplace**
An owner who checked what their home is worth on the SADE marketplace and chose your agency	**SADE Marketplace**
A contact form on your own website (Website forms)	The form's **Source**, or its **Name** if the source is empty
Your own website or tools, sending leads with an API key (API keys and webhooks)	The source the website sends, or the key's name
A lead email from another portal, forwarded to your agency's lead inbox address (**Settings → Integrations → Lead inbox** shows the address, or says it isn't set up yet)	The portal's name, such as MerrJep, Indomio or idealista, or **Email** when the portal isn't recognised
A partner agency selling one of your projects (Partners)	**Partner:** and the partner's name
Added by hand with **Add client**	**CRM**

On the Leads page a card shows what the person did and where, for example "Asked about a property · tiranaliving.al". On the client page the **Source** row of the **Lead** card shows where the person first came from. It doesn't change when they come back through another source; each later enquiry shows its own source on the timeline.

> **Note:** a person needs a valid email address or phone number to become a lead. Portal emails that contain neither show in the lead inbox as needing a person, with a button to add them as a client by hand.

What makes someone a lead

Only enquiries that ask for contact create a lead and start a clock: signing up, an enquiry, wanting to sell, asking about a property, a general question, phoning in, or coming to an open house.

Browsing behaviour, such as viewing a listing or saving a search, is only added to the timeline of someone your agency already knows.

Seller leads

When an owner checks what their home is worth on the SADE marketplace, they can pick an agency to contact them. Your agency is offered to them while **Receive seller leads from the marketplace** is on in Lead routing. It is on by default. Seller leads show a **Seller** chip on the Leads page, with the estimate when there is one.

When someone asks again

If the person is already in your CRM, the new enquiry is added to their record. Details they didn't have before are filled in; nothing your team entered is overwritten.

- If an agent already works them, they stay with that agent.
- If they are in the pond, they stay in the pond.
- If nobody works them and they aren't in the pond, they are routed like a new lead.

If no clock is open for them, a new one starts, so a returning client's new enquiry gets the same fast follow-up as a new lead. If a clock is already open, their agent (or the agency admins, when nobody works them) gets a notification instead.

Lead stages

Every client has a stage. The list is the same for every agency and can't be changed.

Stage	Typical meaning
Lead	New. Nobody has spoken to them yet.
Attempted Contact	Someone tried and didn't reach them.
Spoke with Customer	Someone has spoken to them.
Appointment Set	A viewing or meeting is booked.
Met with Customer	You have met them.
Showing Homes	You are showing them properties.
Listing Agreement	An owner has agreed to list with you.
Active Listing	The owner's property is listed.
Submitting Offers	Offers are going back and forth.
Under Contract	A sale or rental is agreed.
Closed	Done.
Nurture	Not ready yet; keep in touch.
Trash	Not a real lead, or not worth following up.

Some moves happen by themselves:

- A new lead, or a client added by hand, starts at **Lead**.
- Logging a contact where you reached the person moves them up to **Spoke with Customer**, if they were at an earlier stage.
- Logging a contact where you didn't reach them moves a **Lead** to **Attempted Contact**.
- Recording the outcome of a viewing in the viewing log moves the client up to **Showing Homes**, if they were at an earlier stage.

To change the stage by hand, open the client and pick a stage in **Stage** on the **Lead** card. Agents and agency admins can both do this. The CRM confirms "Stage changed to Showing Homes", for example, and writes the change on the client's timeline with your name.

Important: moving a client to any stage after **Attempted Contact** counts as contacting them: it stops the response clock and any action plan set to stop when the person is reached. **Trash** closes the clock without counting as contacted, and stops every action plan running for the client.

The Leads page

The top of the page tells you your agency's response target: "Your agency aims to contact every new lead within 5 min." On the right are the **Taking new leads** switch and a refresh button. The page also refreshes itself every 30 seconds while it is open, as soon as you come back to the tab, and as soon as a lead notification arrives.

The page has up to four sections, in this order.

Section	What's in it	Who sees it
Offered to you	Leads offered to a group of agents. The first to claim one gets it. Shown only while something is on offer.	Agents and agency admins named in a "First to claim" rule
Waiting for you	Your new leads that nobody has contacted yet, oldest first.	Everyone
Pond	Leads nobody has yet. Any agent can claim one.	Everyone
Everyone's uncontacted leads	Other agents' new leads that nobody has contacted yet, with the agent's name.	Agency admins only

Each card shows the person's name (click it to open the client), what they did and the source, their phone and email, the property they asked about with a link to it, and their message in quotes.

Cards under **Waiting for you** have **Call**, **WhatsApp**, **Email** and **Open** buttons. How to use them is on Following up. When nothing is waiting, the section says "Nothing waiting. Nice."

Note: the page lists up to 500 open leads and the 100 most recent older pond leads.

Timers

Every new lead has a clock that runs from the moment it arrives until someone contacts the person. The card shows it as a chip, such as "Waiting 3 min". Hover over it to see the exact time the lead arrived.

Timer colour	Meaning
Neutral	Still within your agency's response target.
Amber	Past the target.
Red	Three times the target, or the agency admins have already been told nobody has contacted the lead.

Offered leads show a countdown instead, such as "6 min left". It turns red under one minute, and shows "Offer expired" when the time is up and the lead has gone to the pond.

Leads in the pond show the waiting timer while their clock runs. Older pond leads show "Last activity" and when that was.

The target, the reminders and when admins are told are set by the agency admin in Speed to lead.

Claiming a lead from the pond

The pond holds leads that nobody works yet. Any agent who is taking new leads can claim one.

1. Find the lead under **Pond**, or under **Offered to you** if it was offered to you.
2. Click **Claim**.
3. The CRM says "Elsa Gashi is yours. Get in touch now.", for example, and the lead moves to **Waiting for you**.

You can also claim from the client page: a pond lead shows an **In the pond** chip and a **Claim** button next to the name.

Rules for claiming:

- Only one agent can win. If someone was quicker, you see "Someone else claimed it first."
- You can claim only from the pond, or an offer made to you that hasn't run out, and only while **Taking new leads** is on.
- Claiming writes the change on the client's timeline, hands you any open action-plan tasks for the person, and starts the action plans set to start for that kind of lead.
- For a claimed lead, the response time in reports and the answer rate counts from the moment you claimed it, not from when it arrived.

An agency admin can also put a client in the pond, or take them out, by changing who they are assigned to. See Assigning and reassigning.

Taking new leads

Taking new leads is your own switch at the top of the Leads page. Turn it off when you are on holiday, ill or out for the day, so new leads go to colleagues instead of waiting for you.

1. Open **Leads**.
2. Click the **Taking new leads** switch.
3. When you turn it off the CRM says "You're away: new leads go to other agents", and a notice stays on the page until you turn it back on. When you turn it on again it says "You're taking new leads again".

While you are away:

- every routing rule passes you over. In a round robin, you keep your place for when you are back;
- you aren't told about new leads in the pond, and you can't claim leads;
- a lead about a listing you manage goes to the pond instead of to you, when your agency gives unmatched leads to the listing's agent;
- leads that are already yours stay yours.

Agency admins can see who is away on the Agents card of Lead routing, but they can't change the switch for you.

What counts as answered

The clock on a lead stops, and the lead counts as contacted, when either of these happens:

- someone logs a contact with the person by call, WhatsApp, email or SMS, whatever the outcome. A call logged as **No answer** or **Wrong number** still stops the clock;
- someone moves the person to a stage after **Attempted Contact** (but not **Trash**).

Moving a lead to **Attempted Contact** by hand doesn't stop the clock.

A lead is answered **in time** when that first contact comes within your agency's response target, counted from when the lead arrived, or from the claim for a claimed lead. The answer rate on Lead routing and in Reports is the share of leads answered in time.

> **Tip:** the quickest way to stop the clock is to use the **Call**, **WhatsApp** or **Email** button on the lead's card, then log how it went. See Following up.

Example

EXAMPLE

Tirana Living Real Estate has no routing rules yet, so each lead goes to the agent of the listing it is about. The response target is 5 minutes.

At 16:58 Marco Rossi fills in the form on the agency's website, tiranaliving.al, about "Apartament 2+1 me ballkon në Bllok". A minute later Jonida Leka asks about the penthouse in Ish-Ekspozita. Both listings are Arta Krasniqi's, so both leads go to Arta. Elsa Gashi's enquiry goes to Erjona Hasani and Dea Hoxha's to Besnik Leka, because those are their listings.

Arta's **Waiting for you** shows Marco and Jonida, oldest first, each with a "Waiting" timer. Ilir Dervishi, the agency admin, sees Elsa's lead under **Everyone's uncontacted leads** with "Agent: Erjona Hasani".

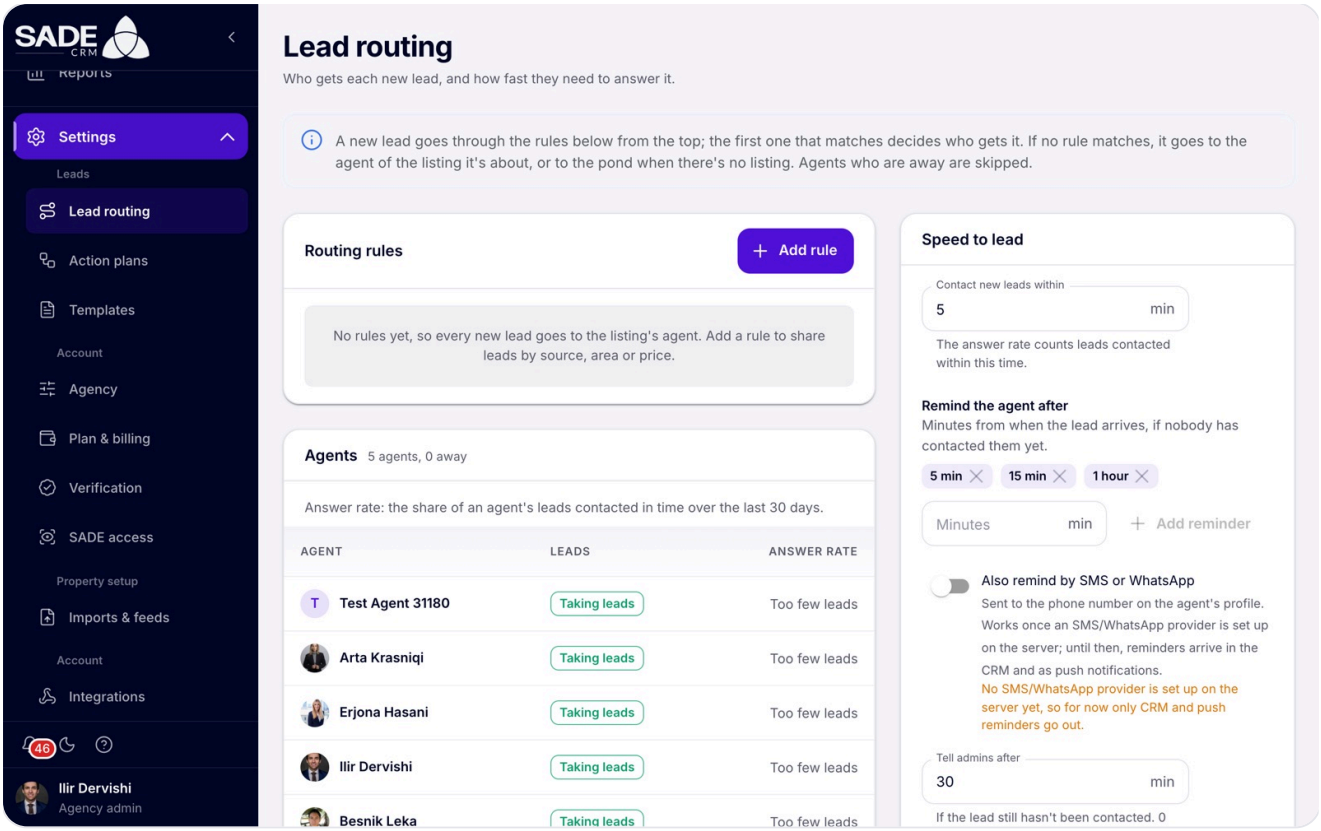
At 17:02 Arta calls Marco. He doesn't pick up, and she logs **No answer**. That still counts as contact: Marco's clock stops after 4 minutes, inside the target, and his stage moves to **Attempted Contact**. Jonida's timer keeps running. At 17:04 it passes 5 minutes and turns amber, and Arta gets a reminder that Jonida has waited 5 minutes.

Lead routing

How the CRM decides who gets each new lead, how to write routing rules, and how to set your agency's response target, reminders and alerts.

Lead routing decides who gets each new lead, and how fast they need to answer it. You write rules such as "marketplace leads for sales in Tiranë go to Arta and Besnik in turn", put them in order, and choose where a lead goes when no rule fits. On the same page you set your agency's response target, the reminders agents get, and when you, the admin, are told about a lead nobody has answered.

Only agency admins can open this page. Go to **Settings → Lead routing** (under the **Leads** heading in the settings menu).



Lead routing at Tirana Living before any rules were added: every lead goes to the listing's agent.

The page has three parts: **Routing rules**, the **Agents** card, and the **Speed to lead** card on the right. A box at the top explains in one sentence how routing works with your current settings.

How a lead finds its agent

When a new lead arrives:

1. If the person already has an agent, or is already in the pond, they stay where they are. Routing is only for people nobody works yet.
2. If the person made one of your agents their own agent on the SADE marketplace, the lead goes straight to that agent, as long as the agent is still active in your agency.
3. Otherwise the rules are tried from the top. The first rule that matches the lead, and can place it, decides who gets it.
4. If no rule places it, the lead goes to the fallback you chose: the listing's agent, or the pond.

Agents who have turned off **Taking new leads** are skipped at every step. See Taking new leads.

Adding a rule

1. Click **Add rule**. The **Add a routing rule** dialog opens.
2. Give the rule a **Name**, for example "Marketplace sales in Tirana". Leave **On** switched on.

3. Under **Which leads**, fill in the conditions the lead must meet. Leave a field empty to match anything.
4. Under **Give it to**, choose how the lead is handed out and to whom.
5. Click **Add rule**. The CRM says “Rule added”.

Which leads

Field	What to enter
Sources	Where the lead comes from. Pick a suggestion (SADE Marketplace, Website, MerrJep, Indomio, idealista, Rightmove) or type any source and press Enter. It must match the source exactly as the CRM shows it, though upper and lower case don’t matter.
What they asked for	The kind of enquiry: **Signed up**, **Inquiry**, **Wants to sell**, **Asked about a listing**, **General question**, **Phoned**, **Came to an open house**.
Cities	The area the rule covers, as a list of cities. Type at least three letters to find each one.
Property types	The types of property, grouped by category.
Sale or rent	**Sale or rent** (either), **For sale** or **For rent**.
Price from (EUR) and **Price up to (EUR)**	A price range, compared with the listing’s price in euros. “From” can’t be higher than “up to”.

A rule matches only when every field you filled in matches.

> **Important: Cities**, **Property types**, **Sale or rent** and the price all come from the listing the lead is about. A lead with no listing never matches a rule that uses them. That includes general questions, lead emails from other portals, and enquiries about a project.

The ways leads are handed out

Give it to	What happens	What you choose
Round robin	Each agent in turn.	**Agents** (one or more), and optionally **Skip agents with an answer rate under** a percentage.
First to claim	The lead is offered to all the agents at once. The first to claim it gets it. If nobody claims it in time, it goes to the pond.	**Agents**, and **Time to claim it** in minutes (1 to 1,440; 10 by default).
One agent	Always the same person.	**Agent** (exactly one).
The pond	The lead goes to the pond, where any agent can claim it.	Nothing more.

You can pick any active agent or agency admin of your agency. The picker shows each person's answer rate, and an **Away** chip for anyone who isn't taking new leads.

How each one behaves:

- **Round robin** follows the order of the agents in the rule. An agent who is away is skipped but keeps their turn for when they are back. If you change the rule's list of agents, the turn starts again from the first agent.
- **Skip agents with an answer rate under** passes over agents whose answer rate is below the figure. Agents with fewer than 5 leads in the last 30 days are never skipped, and if every agent is under the figure, nobody is skipped.
- **First to claim** shows the lead under **Offered to you** on each agent's Leads page, with a countdown.
- If every agent in a rule is away, the rule can't place the lead and the next matching rule is tried.

The order of rules

Rules are tried from the top down, and the first one that matches and can place the lead wins. Put narrow rules above broad ones: a rule for "marketplace sales over €200,000" must sit above a rule for "all marketplace leads", or it will never be reached.

Each rule in the list is written out as a sentence, for example "Leads from SADE Marketplace for sale in Tiranë between €80K and €250K → round robin between Arta Krasniqi and Besnik Leka". The card's heading shows how many rules you have and how many are on.

To change a rule:

- **Reorder**: drag it by its handle, or use **Move up** and **Move down**.
- **Pause**: use its switch. A switched-off rule shows an **Off** chip and is skipped.
- **Edit**: click the pencil (**Edit**), change the rule and click **Save**. The CRM says “Rule saved”.
- **Delete**: click the bin (**Delete**) and confirm with **Delete rule**. New leads stop going through it; leads it already gave out keep their agent.

When no rule matches

The last line of the rules card says where a lead goes when no rule places it. You choose this in the **Speed to lead** card, under **When no rule matches, give the lead to**:

- **The listing’s agent (the pond when there’s no listing)**. This is the default. A lead about a listing goes to the agent the listing is assigned to. A lead with no listing, or whose listing agent is away, goes to the pond.
- **The pond, where any agent can claim it**.

With no rules at all, every lead goes to this fallback.

The agents card

The **Agents** card lists everyone who can receive leads, with:

Column	What it shows
Agent	The person’s name.
Leads	**Taking leads**, or **Away** if they have turned off **Taking new leads**.
Answer rate	The share of the agent’s leads contacted within your response target over the last 30 days. It shows **Too few leads** until the agent has had 5 leads in 30 days.

The answer rate counts the leads that are that agent’s now. Leads nobody contacted count as not in time. For a lead the agent claimed, the time counts from the claim.

The card is for reading only. Each agent turns **Taking new leads** on and off themselves on their Leads page.

Speed to lead settings

The **Speed to lead** card holds one set of settings for the whole agency. They apply to every lead, whichever rule placed it.

Setting	What it does	Allowed	Default
Contact new leads within	Your response target, in minutes. The answer rate counts leads contacted within this time, and the timers on the Leads page turn amber after it.	1 to 1,440	5
Remind the agent after	Reminders, in minutes from when the lead arrives, if nobody has contacted the person yet. Type a number in **Minutes** and click **Add reminder**; remove one with its cross.	Up to 6, each 1 to 10,080	5, 15 and 60
Also remind by SMS or WhatsApp	Also sends reminders to the phone number on the agent's profile.	On or off	Off
Tell admins after	Minutes after which every agency admin is told the lead still hasn't been contacted. 0 turns this off.	0 to 10,080	30
Move the lead to the pond when admins are told	At that moment, takes the lead from its agent and puts it in the pond.	On or off	Off
When no rule matches, give the lead to	The fallback described above.	Listing's agent or the pond	The listing's agent
Receive seller leads from the marketplace	Offers your agency to owners who check what their home is worth on the SADE marketplace. Each one who chooses you arrives as a new lead, routed by your rules.	On or off	On

Click **Save** to keep your changes, or **Discard** to undo them. The CRM says "Speed-to-lead settings saved".

> **Note:** SMS and WhatsApp reminders need a messaging provider set up on SADE's side. Until then the card says so, and reminders arrive in the CRM and as push notifications on the phone app only.

What the agents and admins receive

When	Who	Notification
A lead is given to an agent	That agent	“New lead: Marco Rossi”, with the target, e.g. “Contact them within 5 minutes.”
A lead is offered with **First to claim**	Each agent it is offered to	“Claim this lead: …”
A lead lands in the pond	Every agent taking new leads, and the agency admins	“New lead in the pond: …”
A reminder minute passes and nobody has made contact	The lead’s agent, or the agents it is offered to	“Jonida Leka has waited 5 min”
The **Tell admins after** minute passes	Every agency admin	“No one has contacted …”, with how long and which agent

Reminders and the admins’ alert count from when the lead arrived, even if an agent claimed it later. Once a lead has been escalated to the admins its timer turns red. All of these go to the bell and the Notifications page, and as push notifications to the phone app. Clicking one opens the client.

Example

EXAMPLE

Ilir Dervishi, the admin of Tirana Living Real Estate, sets up routing for the first time.

Rule 1, “Marketplace sales in Tiranë”. Sources: SADE Marketplace. Cities: Tiranë. **For sale**. Price from (EUR) 80000, up to 250000. Give it to **Round robin**, agents Arta Krasniqi and Besnik Leka.

Rule 2, “Portal emails”. Sources: MerrJep and Indomio. Give it to **First to claim**, agents Arta, Besnik and Erjona Hasani, **Time to claim it** 10 minutes. This rule uses no city or price, because portal emails are never linked to a listing.

The fallback stays on **The listing’s agent**. In **Speed to lead** he keeps the target of 5 minutes, reminders at 5, 15 and 60 minutes, and **Tell admins after** 30.

On Monday morning:

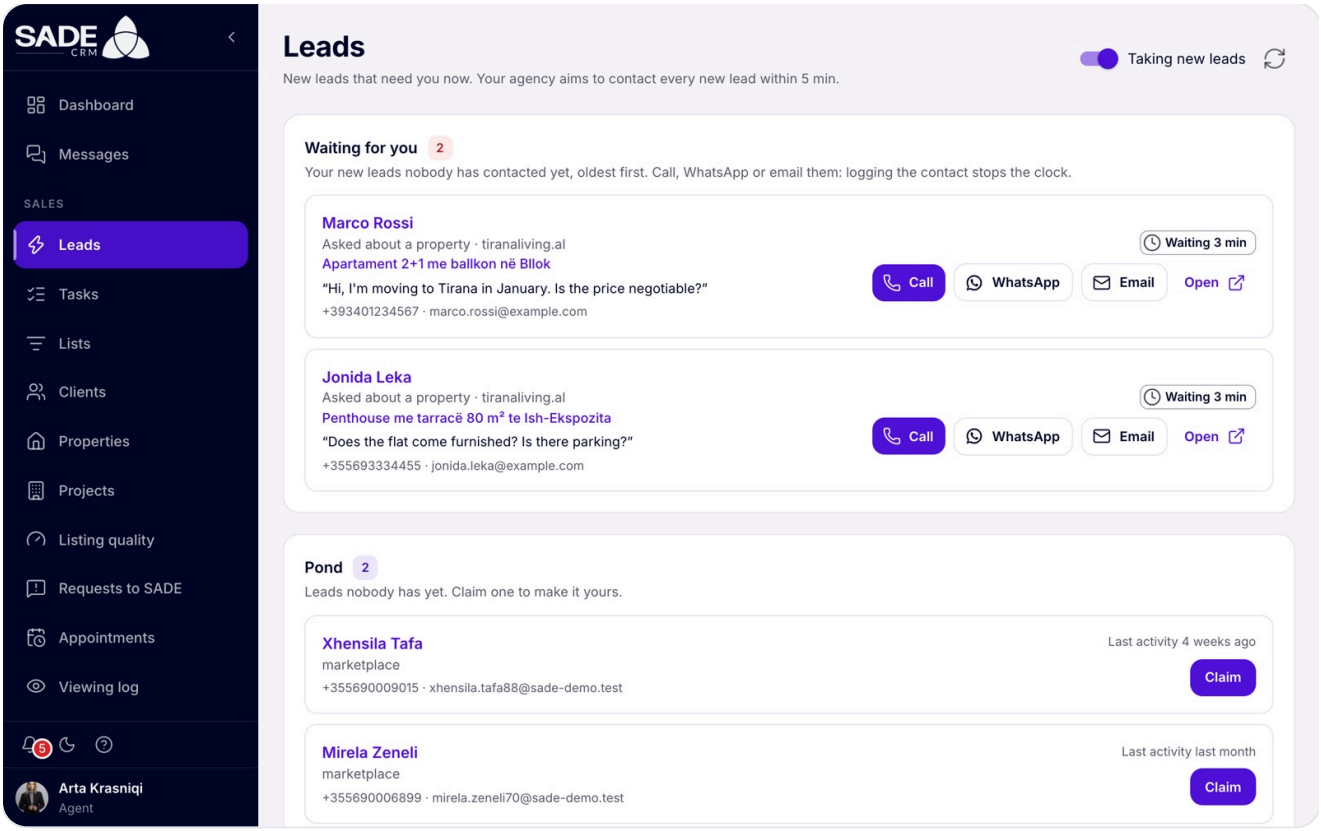
- A buyer asks on the marketplace about a 2+1 for sale in Blloku, Tiranë, at €145,000. Rule 1 matches and the lead goes to Arta. The next one goes to Besnik.
- A buyer asks about a flat for rent in Tiranë. Rule 1 doesn’t match (it is for sale only) and rule 2 doesn’t either, so the lead goes to the listing’s agent, Erjona.
- A MerrJep email arrives at 10:00. Arta, Besnik and Erjona each get “Claim this lead”. Besnik claims it at 10:04 and calls at 10:06. For his answer rate, the 2 minutes count from the claim.
- Besnik is away on Tuesday and turns off **Taking new leads**. The round robin in rule 1 gives every marketplace sale lead to Arta until he is back, then picks up with his turn.

Following up

How to call, WhatsApp, email or text a lead from the CRM, log how it went, send a template, reassign a client and keep notes on the timeline.

Following up is where leads become clients. The CRM doesn’t place calls or send messages itself. Its **Call**, **WhatsApp** and **Email** buttons open your own phone, WhatsApp or email app with the person’s details filled in, so replies come back to you. When you return, the CRM asks how it went and writes the answer on the client’s timeline. That record stops the lead’s clock, moves the stage on and tells your action plans whether to keep going.

Agents and agency admins can follow up with any client they can open.



Arta's Leads page: two leads from the agency's website, each waiting 3 minutes.

Where the contact buttons are

Where	Buttons
Leads, on each card under **Waiting for you**	**Call**, **WhatsApp**, **Email**
The client page, at the top	**Call**, **WhatsApp**, **Email**, **Send a template**
Lists, on each person's row	Call, WhatsApp and Email icons
Tasks, on a call or message task	**Call**, **Send WhatsApp**, **Send email** or **Send SMS**

A button is greyed out when the client has no phone number ("No phone number for this client") or no email address ("No email address for this client").

Logging a call, WhatsApp, email or SMS

1. Click **Call**, **WhatsApp** or **Email**. Your phone app, WhatsApp (in a new tab) or email app opens with the person's number or address.
2. Make the call or send the message.
3. Back in the CRM, the **How did it go?** dialog is waiting, for example "Your call with Marco Rossi".

4. Choose what happened. This is optional.
5. Add a **Note (optional)**: what was said, what they are looking for, when to follow up. Up to 4,000 characters.
6. If you started from a task, leave **Mark the task done** ticked to close the task as well.
7. Click **Log contact**. The CRM says “Contact logged”.

If you didn’t actually get in touch, click **Don’t log** and nothing is recorded. Clicking outside the dialog doesn’t close it, so you can’t skip it by accident.

SMS is logged the same way. You send an SMS from a task or with **Send a template** (see below).

The outcomes

Channel	Outcomes you can choose
Call	**Reached them**, **No answer**, **Left a message**, **Wrong number**
WhatsApp and SMS	**They replied**, **Sent, no reply yet**, **Wrong number**
Email	**They replied**, **Sent, no reply yet**

Reached them and **They replied** mean you reached the person. If you log without choosing an outcome, the CRM also counts it as reached. The other outcomes mean you didn’t reach them.

> **Tip:** save phone numbers with the country code, for example +355 69 123 4567. That way the WhatsApp button always opens the right chat.

What logging a contact does

Any logged contact, whatever the outcome, stops the lead’s response clock and counts as contacted in the answer rate and in Reports. A call logged as **No answer** still stops the clock, so the clock measures how fast your team acts, not whether the client picks up. The full rule is on Leads.

What else happens depends on whether you reached the person:

	Reached	Not reached
Stage	Moves up to **Spoke with Customer**, if earlier.	**Lead** becomes **Attempted Contact**. Later stages stay as they are.
Action plans	Plans set to stop when the person is reached stop, and their open tasks are removed.	Plans keep running.
Marketplace	If the client has a SADE marketplace account with the same email, you become their agent there for 30 days from your last contact.	Nothing changes.

When you become a client's agent on the marketplace, they are told by email and can end it. While it lasts, the **Marketplace** card on their client page shows it, and their new enquiries come straight to you.

Sending a template

Templates are messages your admin has written once, which the CRM fills in with the person's name, your name, the listing and a link.

1. Open the client and click **Send a template**.
2. Choose the channel: **WhatsApp**, **Email** or **SMS**.
3. Pick the **Template**. If there is only one for that channel, it is already chosen.
4. Read the **Preview**, which shows the message filled in for this client.
5. Click **Open in WhatsApp**, **Open in email** or **Open in Messages**. The message opens in your own app, ready to send. Check it and send it from there.
6. Back in the CRM, the **How did it go?** dialog opens. Log the contact as above.

The listing in the message is the last one the person asked about. If they haven't asked about one, the listing title and link are left empty, so choose a template that reads well without them.

If no template exists for the channel, the dialog says so: "No WhatsApp templates yet. An admin can add them in Settings, under Templates."

Tasks made by an action plan can carry a template too. Their **Send WhatsApp**, **Send email** or **Send SMS** button opens the filled-in message directly.

Assigning and reassigning

Every client is either assigned to one agent, or unassigned. Only agency admins can change it; agents see the name of the assigned agent as text.

1. Open the client.
2. On the **Lead** card on the right, open **Assigned to**.
3. Pick an agent, or **Unassigned**.

When you reassign a client:

- the change is written on the timeline, for example “From Arta Krasniqi to Besnik Leka”;
- if the lead’s clock is still running, it moves to the new agent;
- open tasks created by action plans move to the new agent. Tasks someone created by hand stay with whoever had them.

Choosing **Unassigned** puts the client in the pond, where any agent can claim them. The CRM says “No longer assigned to anyone”. Assigning an agent to a pond client takes them out of the pond.

> **Note:** you can pick any active agent or agency admin of your agency.

Notes on the timeline

Notes are for anything that isn’t a contact: what you learnt at a viewing, a change in budget, a reminder for your colleague.

1. Open the client. The **Timeline** tab opens first.
2. Type in the box “Add a note about a call, a meeting or what they’re looking for”. Up to 10,000 characters.
3. Click **Add note**.

The note appears at the top of the timeline with your name and the time. The timeline shows the newest first; click **Load older** at the bottom to see more.

To delete a note, click its delete button, then **Delete note** to confirm. Only the person who wrote it, or an agency admin, can delete a note, and it is removed for everyone.

Example

EXAMPLE

Jonida Leka asked on tiranaliving.al whether the penthouse in Ish-Ekspozita comes furnished. She is Arta's lead. By 17:05 she has been waiting 6 minutes, and her timer has turned amber.

Arta clicks **Call** on Jonida's card. Her phone dials, but Jonida doesn't pick up. Back in the CRM, Arta chooses **No answer** and clicks **Log contact**. The clock stops at 6 minutes, just outside the agency's 5-minute target, so Jonida counts as contacted but not in time. Jonida's stage moves from **Lead** to **Attempted Contact**, and because she wasn't reached the "New buyer enquiry" action plan keeps running.

Arta then opens Jonida's client page, clicks **Send a template**, picks **WhatsApp** and the template "First reply (WhatsApp)". The preview reads "Hi Jonida, this is Arta Krasniqi from Tirana Living Real Estate. Thanks for asking about Penthouse me tarracë 80 m² te Ish-Ekspozita..." with the listing link. She clicks **Open in WhatsApp**, sends it, and logs **Sent, no reply yet**.

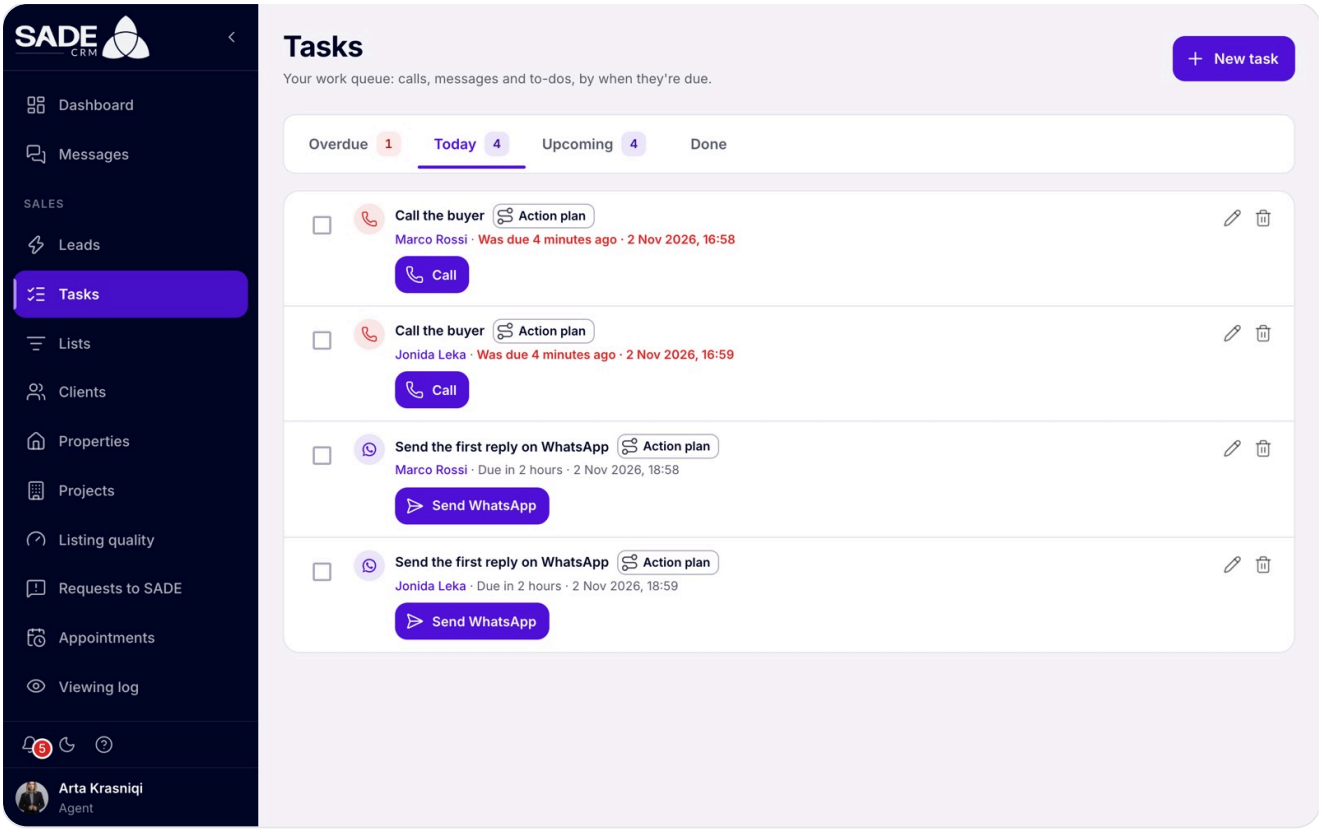
Twenty minutes later Jonida replies on WhatsApp. Arta answers her, then clicks **WhatsApp** on the client page to log it: **They replied**, with the note "Furnished, one parking space. Wants to see it Tuesday morning." Jonida moves to **Spoke with Customer**, and the action plan stops and removes its open tasks.

Tasks and action plans

Your work queue of calls, messages and to-dos, and the action plans that turn a follow-up routine into tasks for every new lead.

Tasks is each person's work queue: the calls, messages and to-dos they need to do, sorted by when they are due. You can add tasks by hand, and an **action plan** can add them for you. An action plan is a follow-up routine, such as "call now, WhatsApp in two hours, call again tomorrow", that becomes a set of tasks for the agent as soon as a lead arrives, and stops once someone reaches the person.

Agents see and work their own tasks. Agency admins see their own, can look at any agent's tasks, and are the only ones who make action plans. Open tasks from **Sales → Tasks**; action plans are under **Settings → Action plans**.



Arta's tasks for today. The "New buyer enquiry" plan added a call and a WhatsApp message for each of her two new leads.

The Tasks page

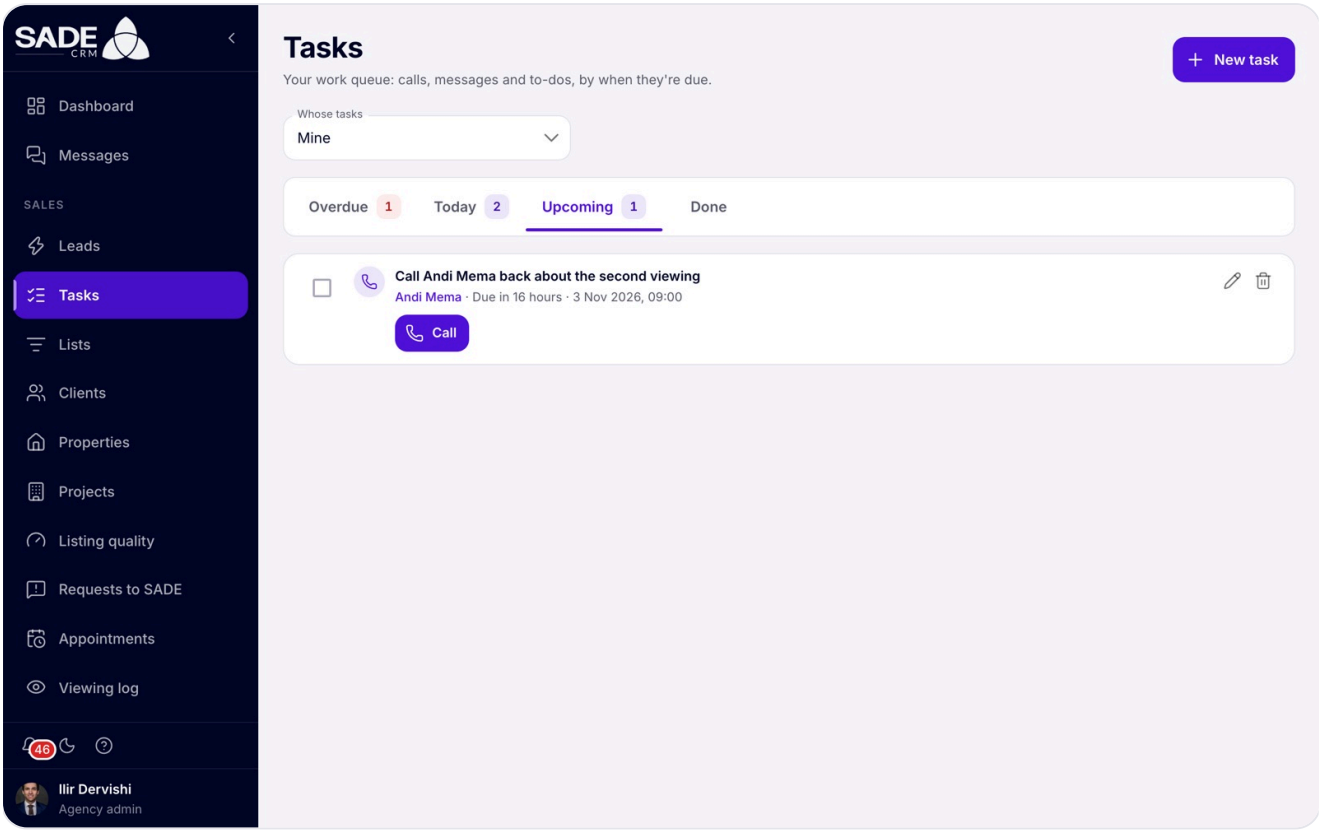
The page has four tabs. The first three show how many tasks they hold.

Tab	What's in it
Overdue	Tasks due before today that aren't done.
Today	Tasks due today. This tab opens first.
Upcoming	Tasks due from tomorrow on.
Done	Finished tasks, the 200 most recent.

"Today" follows your agency's time zone, set in Agency settings. A task whose time has passed turns red and shows when it was due, for example "Was due 4 minutes ago". From the next day it moves to **Overdue**.

Each task shows its type, what to do, the client's name (a link to the client page) and when it is due. Tasks added by an action plan have an **Action plan** chip.

Agency admins have a **Whose tasks** menu above the tabs. It shows **Mine** by default; pick an agent to see their tasks.



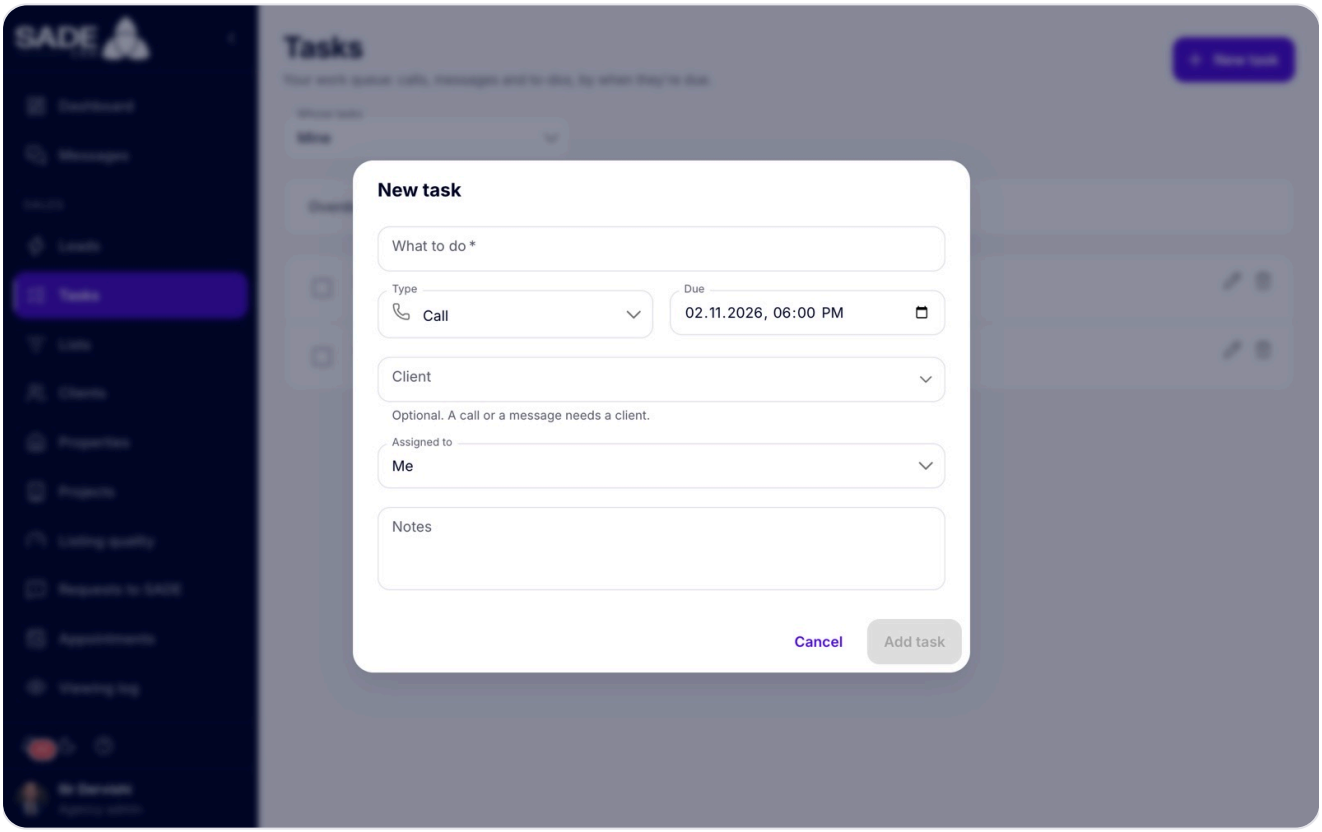
Ilir's own tasks, on the Upcoming tab.

> **Note:** tasks don't send reminders or notifications when they come due. Check **Today** and **Overdue** at the start of the day. You can also see your tasks in the phone app.

Adding a task

1. Click **New task** on the Tasks page, or **Add task** on the **Tasks** card of a client page.
2. Fill in the **New task** dialog (see the table).
3. Click **Add task**. The CRM says "Task added".

Field	What to enter
What to do	Required, up to 300 characters. For example “Call back about the 2+1 in Blloku”.
Type	**Call**, **WhatsApp**, **Email**, **SMS** or **To-do**. Call is chosen by default.
Due	The date and time. The next full hour is filled in for you.
Client	Optional for a to-do, but a call or a message needs a client. Type at least 2 letters to search. You can’t change the client later.
Message template	For WhatsApp, email and SMS: **None**, or one of your agency’s templates for that channel. It opens filled in for the client when you do the task.
Assigned to	Agency admins only: **Me** or one of the agents. Agents’ tasks are always their own.
Notes	Anything that helps.



The New task dialog, as an agency admin sees it.

Working through your tasks

1. Click the task’s button: **Call**, **Send WhatsApp**, **Send email** or **Send SMS**. Your own phone, WhatsApp, email or messages app opens. If the task has a template, the message is already written.

2. Make the call or send the message.
3. Back in the CRM, the **How did it go?** dialog opens with **Mark the task done** already ticked. Choose an outcome and click **Log contact**.

Logging the contact both records it on the client's timeline and ticks off the task. How the outcome counts is explained in Following up.

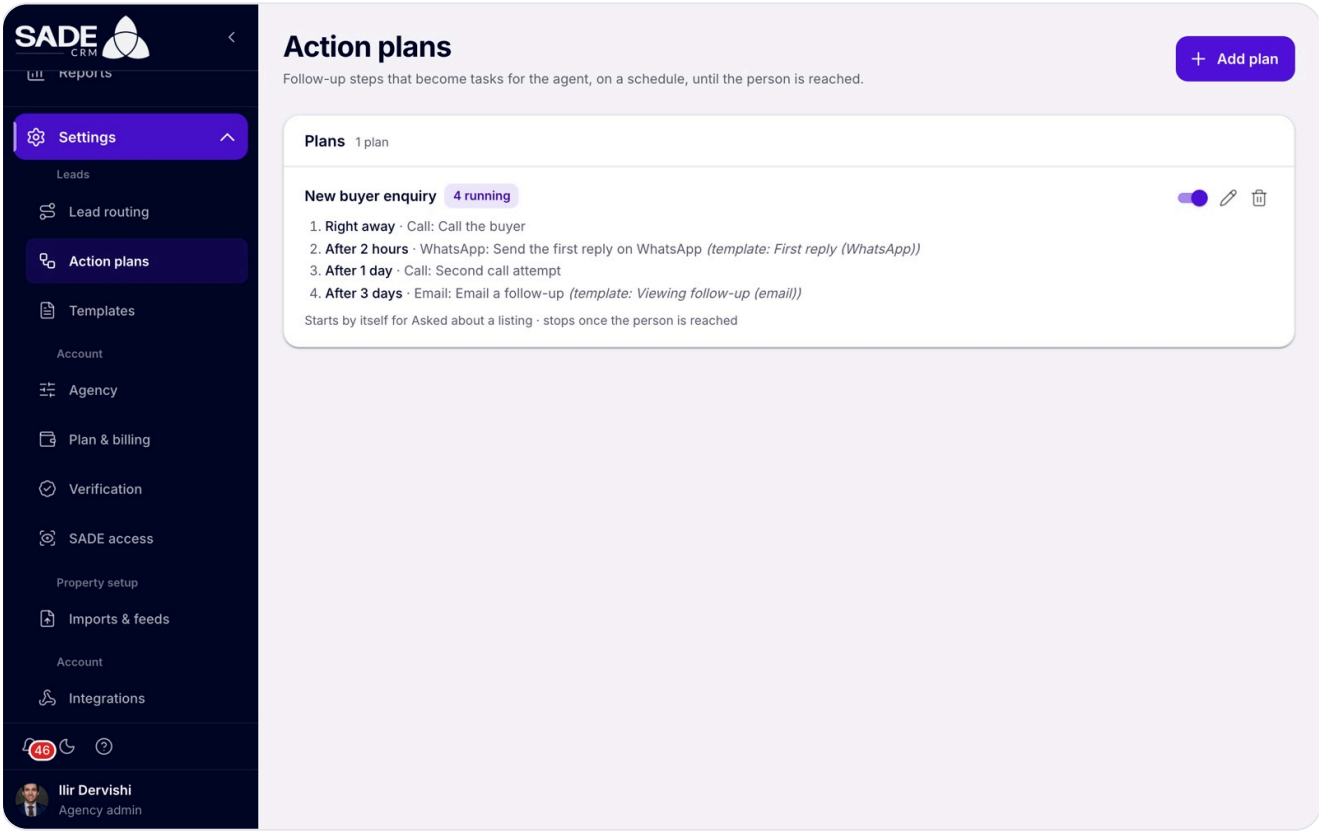
For a to-do, or a task you did another way, tick the box at the start of the row to mark it done. Untick it to reopen it.

To change a task, click the pencil (**Edit task**). To delete it, click the bin (**Delete task**) and confirm; this can't be undone.

Who	What they can do
Agent	Add tasks for themselves; edit, complete and delete their own tasks.
Agency admin	Add tasks for anyone in the agency; edit, complete and delete any task in the agency.

Action plans

An action plan is a list of steps. Each step becomes a task, due a set time after the plan starts. When a plan starts for a client, all its steps become tasks at once, for the client's agent, and they appear under **Today** and **Upcoming** as they come due.



The “New buyer enquiry” plan, running for four people.

Creating a plan

Only agency admins can create, change or delete plans.

1. Go to **Settings → Action plans** and click **Add plan**.
2. Give the plan a **Name**, for example “New marketplace lead”. Leave **On** switched on.
3. Add the **Steps**. For each one:
   - **After**: how long after the plan starts the task is due, as a number and a **Unit** (**hours** or **days**). 0 means right away.
   - **Type**: **Call**, **WhatsApp**, **Email**, **SMS** or **To-do**.
   - **Task**: what the agent sees, for example “Call to introduce yourself”.
   - **Template**: for WhatsApp, email and SMS steps, the message the agent sends, filled in for the person.

   Click **Add step** for another step, or **Remove step** to drop one.
4. Under **Start by itself**, choose which new leads start the plan by themselves: **Sources**, **What they asked for**, or both. Leave both empty if the plan should only be started by hand.
5. Leave **Stop when the person is reached** on if the plan should end once an agent reaches the person.
6. Click **Add plan**. The CRM says “Plan added”.

Rules for steps:

- A plan has 1 to 30 steps.
- A step can be due at most one year after the plan starts.
- Steps run in order of their time, whatever order you typed them in. A new step is set to one day after the last one.

The plan list shows each plan’s steps, which template each uses, when it starts (“Starts by itself for …” or “Started by hand from a client”), whether it “stops once the person is reached” or “runs to the end”, and how many people it is running for. Use the switch to turn a plan off without deleting it.

> **Note:** changing a plan doesn’t change tasks it has already created. Deleting a plan stops it for everyone it is running for and removes their open tasks.

When a plan starts by itself

A plan starts by itself when a new lead is given to an agent the moment it arrives, or when an agent claims a lead from the pond or an offer. It starts only if the plan is on and the lead matches:

- if you filled in **Sources**, the lead’s source must be one of them;

- if you filled in **What they asked for**, the lead must be one of those kinds of enquiry;
- if you filled in both, both must match.

A lead that goes to the pond gets no plan until someone claims it. Clients added by hand with **Add client** never start a plan by themselves. A plan that is already running for a client isn't started a second time.

Starting a plan by hand

Any agent or agency admin can start a plan for a client.

1. Open the client and find the **Action plans** card.
2. Click **Start**.
3. Pick the **Plan**. Only plans that are on are offered. The dialog lists the tasks it will add, such as "Now: Call the buyer (Call)" and "After 2 hours: ...".
4. Click **Start plan**. The CRM says "Plan started".

When a plan stops

The **Action plans** card on the client page shows each plan that has run for them, marked **Running**, **Stopped** or **Finished**, with when it started or ended.

Status	Why
Stopped, "they were reached"	An agent logged a contact that reached the person, or moved them to a stage after **Attempted Contact**. Only plans with **Stop when the person is reached** on.
Stopped, "moved to trash"	The client was moved to the **Trash** stage. This stops every plan.
Stopped, "stopped by hand"	Someone clicked **Stop** on the client's **Action plans** card.
Stopped, "the plan was deleted"	An admin deleted the plan.
Finished	The last of its tasks was ticked off.

When a plan stops, its open tasks are removed. Tasks already done stay in **Done**. If a client is reassigned, the plan's open tasks move to the new agent.

Example

EXAMPLE

Tirana Living's plan "New buyer enquiry" starts by itself for leads that **Asked about a listing**, and stops once the person is reached. Its steps:

1. **Right away**: Call, "Call the buyer".
2. **After 2 hours**: WhatsApp, "Send the first reply on WhatsApp", with the template "First reply (WhatsApp)".
3. **After 1 day**: Call, "Second call attempt".
4. **After 3 days**: Email, "Email a follow-up", with the template "Viewing follow-up (email)".

On 2 November at 16:58 Marco Rossi asks about a flat on tiranaliving.al, and the lead goes to Arta Krasniqi. The plan starts at once and adds four tasks to Arta's list: the call due at 16:58, the WhatsApp at 18:58, the second call at 16:58 on 3 November, and the email at 16:58 on 5 November.

At 17:02 the first call shows in red on **Today**: "Was due 4 minutes ago". Arta clicks **Call**, Marco doesn't answer, and she logs **No answer** with **Mark the task done** ticked. The call task is done, and the other three stay, because Marco wasn't reached.

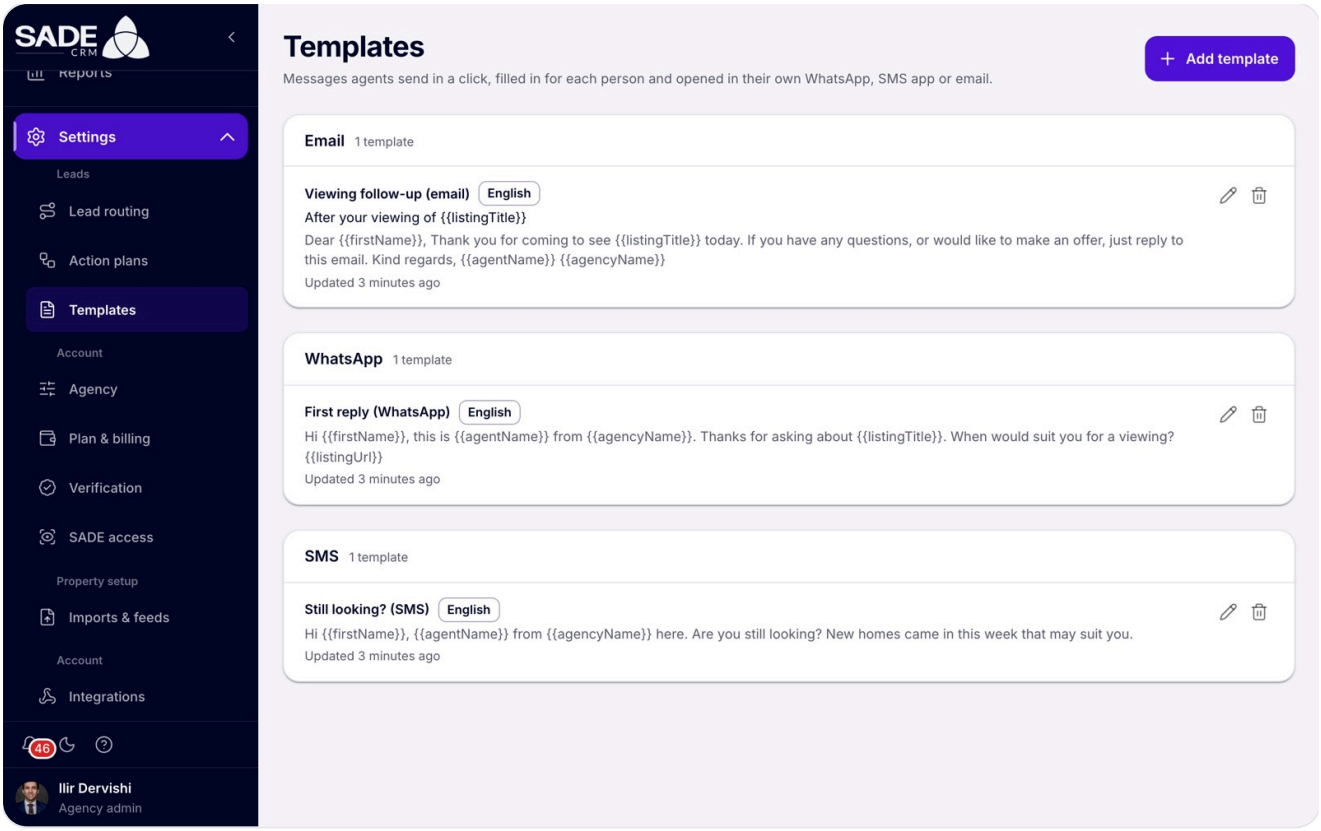
At 18:58 Arta clicks **Send WhatsApp**. WhatsApp opens with the first reply already written for Marco. He answers within minutes, and Arta logs **They replied**. The plan stops ("they were reached"): the second call and the email are removed from her **Upcoming** tab.

Templates

Ready-made WhatsApp, email and SMS messages that agents send in a click, filled in with the person's name, the agent, the agency and the listing.

Templates are the messages your agents send most often, written once for the whole agency. When an agent uses one, the CRM fills in the person's name, the agent's own name, the agency and the listing they asked about, then opens the message in the agent's own WhatsApp, SMS app or email. SADE doesn't send the message itself: the agent sends it from their own account, so the reply comes back to them.

Agency admins write and edit templates under **Settings → Templates**. Everyone in the agency uses them: from a client page, from a task, and in action plan steps.



Tirana Living's three templates, grouped by channel.

The page groups templates by channel: **Email**, **WhatsApp** and **SMS**. Each shows its name, its language, the message with its placeholders, and when it was last updated.

Adding a template

1. Go to **Settings → Templates** and click **Add template**.
2. Fill in the **Add a template** dialog (see the table).
3. Check the **Preview**, which shows the message with sample details.
4. Click **Add template**. The CRM says "Template added".

Field	What to enter
Name	What agents pick from the list, up to 100 characters. For example "First WhatsApp".
Channel	**Email**, **WhatsApp** or **SMS**. WhatsApp is chosen by default.
Language	The language the message is written in. It labels the template, and the listing link opens the marketplace in that language.
Subject	Email only. Placeholders work here too.
Message	The text, up to 5,000 characters. Use **Insert** to add a placeholder where the cursor is.

To change a template, click its pencil, edit it and click **Save**. To delete one, click its bin and confirm.

> **Important:** deleting a template removes it from any action plan step or task that used it. Those steps and tasks stay, but no longer offer a message.

Placeholders

Placeholders are words in double curly brackets. The CRM replaces them when an agent uses the template.

Insert	Placeholder	Filled in with
First name	`{{firstName}}`	The first word of the client's full name.
Full name	`{{name}}`	The client's full name.
Agent's name	`{{agentName}}`	The name of the agent sending the message.
Agency name	`{{agencyName}}`	Your agency's name.
Listing title	`{{listingTitle}}`	The title of the listing the person last asked about.
Listing link	`{{listingUrl}}`	A link to that listing on the SADE marketplace.

Anything else in double curly brackets is left exactly as written, so check the spelling.

If the person hasn't asked about one of your listings, the listing title and link are left empty. Write templates that use them, such as a first reply to a listing enquiry, separately from general ones, such as a "still looking?" message.

Channels and limits

Channel	Opens in	Good to know
WhatsApp	WhatsApp, in a new tab, with the client's number.	Needs a phone number on the client.
Email	The agent's email app, with the subject and message filled in.	Needs an email address on the client.
SMS	The agent's messages app.	Needs a phone number. The editor counts characters: over 160, an SMS is sent in parts.

Every message can be up to 5,000 characters long, and a template name up to 100.

Using a template

Agents send templates in three ways:

- **From a client page**: click **Send a template**, choose the channel and the template, then **Open in WhatsApp**, **Open in email** or **Open in Messages**.
- **From a task**: a WhatsApp, email or SMS task with a template opens the filled-in message when the agent clicks **Send WhatsApp**, **Send email** or **Send SMS**.
- **In an action plan**: a message step with a template gives each new lead a task that carries it.

After sending, the agent logs how it went. The steps are on Following up.

Example

EXAMPLE

Tirana Living has three templates, all in English:

- **First reply (WhatsApp)**: “Hi {{firstName}}, this is {{agentName}} from {{agencyName}}. Thanks for asking about {{listingTitle}}. When would suit you for a viewing? {{listingUrl}}”
- **Viewing follow-up (email)**, with the subject “After your viewing of {{listingTitle}}”.
- **Still looking? (SMS)**: “Hi {{firstName}}, {{agentName}} from {{agencyName}} here. Are you still looking? New homes came in this week that may suit you.”

Erjona Hasani sends the first one to Elsa Gashi, who asked about “Apartament 3+1 me pamje nga Liqeni”. WhatsApp opens with: “Hi Elsa, this is Erjona Hasani from Tirana Living Real Estate. Thanks for asking about Apartament 3+1 me pamje nga Liqeni. When would suit you for a viewing?”, followed by the link to the listing.

The SMS template uses no listing, so Besnik Leka can send it to any buyer, even one who never asked about a particular flat. Filled in for Dea Hoxha it comes to 126 characters, so it goes as a single SMS.

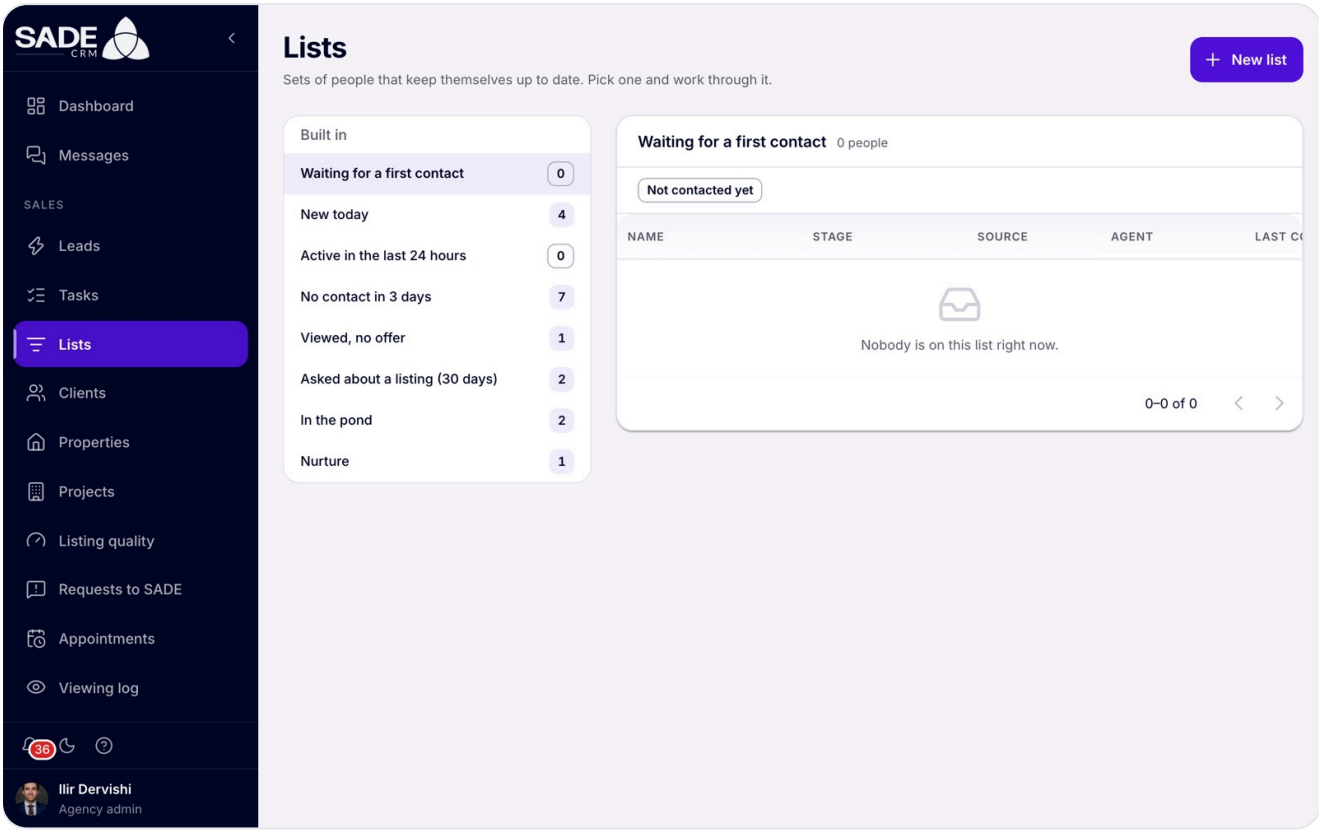
Lists

Lists of clients that keep themselves up to date, such as leads nobody has called in three days, and how to make and share your own.

Lists are sets of clients that keep themselves up to date. Each list is a set of conditions, such as “no contact in 3 days” or “had a viewing but no deal”, and whoever meets them is on it, right now.

Pick a list and work down it: every row has buttons to call, WhatsApp or email the person.

Everyone in the agency uses Lists. The CRM comes with eight built-in lists, each agent can make their own, and agency admins can share lists with the whole agency. Open it from **Sales → Lists**.



The built-in lists, each with the number of people on it now.

Using a list

The left column groups lists under **Built in**, **Shared with the agency** and **My lists**, each with a live count. Click a list to see its people on the right, 50 to a page. The list's conditions show as chips under its name.

Column	What it shows
Name	The client.
Stage	Their lead stage.
Source	Where they first came from.
Agent	Their agent, or **In pond**, or **Unassigned**.
Last contact	The last call, WhatsApp, email or SMS someone logged, or **Never**.
Last activity	The last thing the client did themselves, such as an enquiry.

Each row has Call, WhatsApp and Email buttons, and a button to open the client. Contacts you make from a list are logged in the usual way; see Following up.

Who sees whom

Agency admins see everyone who meets a list's conditions. An agent sees only the people assigned to them, plus the pond, on every list: built-in, shared or their own. So when Arta and Besnik open the same shared list, each sees their own clients on it.

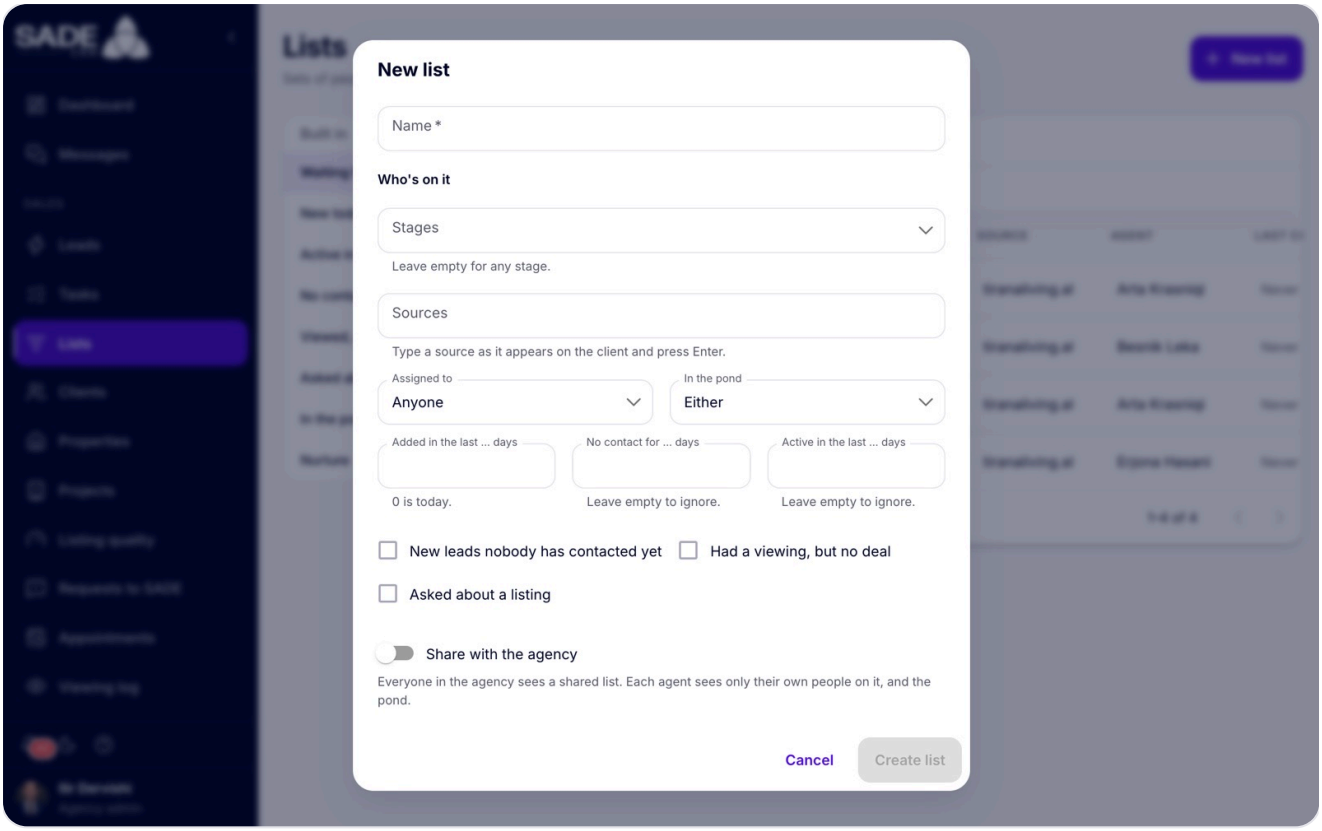
The built-in lists

List	Who is on it
Waiting for a first contact	New leads whose clock is still running: nobody has contacted them yet.
New today	Clients added today, in your agency's time zone.
Active in the last 24 hours	Clients who did something themselves in the last 24 hours, such as an enquiry.
No contact in 3 days	Clients added more than 3 days ago with no contact logged in the last 3 days. Clients at **Closed**, **Trash** or **Nurture** are left out.
Viewed, no offer	Clients who had a completed viewing and have no deal.
Asked about a listing (30 days)	Clients who asked about one of your listings in the last 30 days.
In the pond	Clients in the pond, whom any agent can claim.
Nurture	Clients at the **Nurture** stage.

Built-in lists can't be changed or deleted.

Making your own list

1. Click **New list**.
2. Give it a **Name**, for example "Buyers in Blloku to call this week".
3. Under **Who's on it**, set the conditions (see the table). Leave a field empty to ignore it.
4. Agency admins only: switch on **Share with the agency** to make it a shared list.
5. Click **Create list**. The CRM says "List created".



The New list dialog. Share with the agency appears for agency admins only.

Condition	What it does
Stages	Only clients at these stages. Leave empty for any stage.
Sources	Only clients from these sources. Type a source exactly as it appears on the client, such as “SADE Marketplace” or “MerrJep”, and press Enter.
Assigned to	**Anyone**, **Me** (yours) or **Nobody** (no agent).
In the pond	**Either**, **In the pond** or **Not in the pond**.
Added in the last … days	Clients added recently. 0 means today.
No contact for … days	Clients nobody has logged a contact with for this many days.
Active in the last … days	Clients who did something themselves within this many days.
New leads nobody has contacted yet	Only leads whose clock is still running.
Had a viewing, but no deal	Only clients with a completed viewing and no deal.
Asked about a listing	Only clients who asked about a listing. Then choose **Which listing** (type at least 2 letters; leave empty for any of the agency’s listings) and **In the last … days** (leave empty for any time).

A client is on the list when they meet every condition you set.

Changing or deleting a list

Select the list, then use the pencil (**Edit list**) or the bin (**Delete list**) next to its name.

- You can change or delete your own lists. Shared lists can be changed or deleted by agency admins.
- An agency admin can turn a personal list into a shared one, or back, with **Share with the agency** when editing it.
- Deleting a list removes only the list. The people on it stay exactly as they are.

Example

EXAMPLE

Besnik Leka wants a list of buyers he has spoken to but not chased for a while. He clicks **New list** and sets:

- **Name**: “Buyers to call this week”
- **Stages**: **Spoke with Customer**, **Appointment Set**, **Showing Homes**
- **Assigned to**: **Me**
- **No contact for … days**: 5

The list appears under **My lists**. On Monday it holds four of his buyers, including Gentian Shehu, whom he last called six days ago. He calls Gentian from the row and logs **Reached them**. His last contact is now today, so he drops off the list at once.

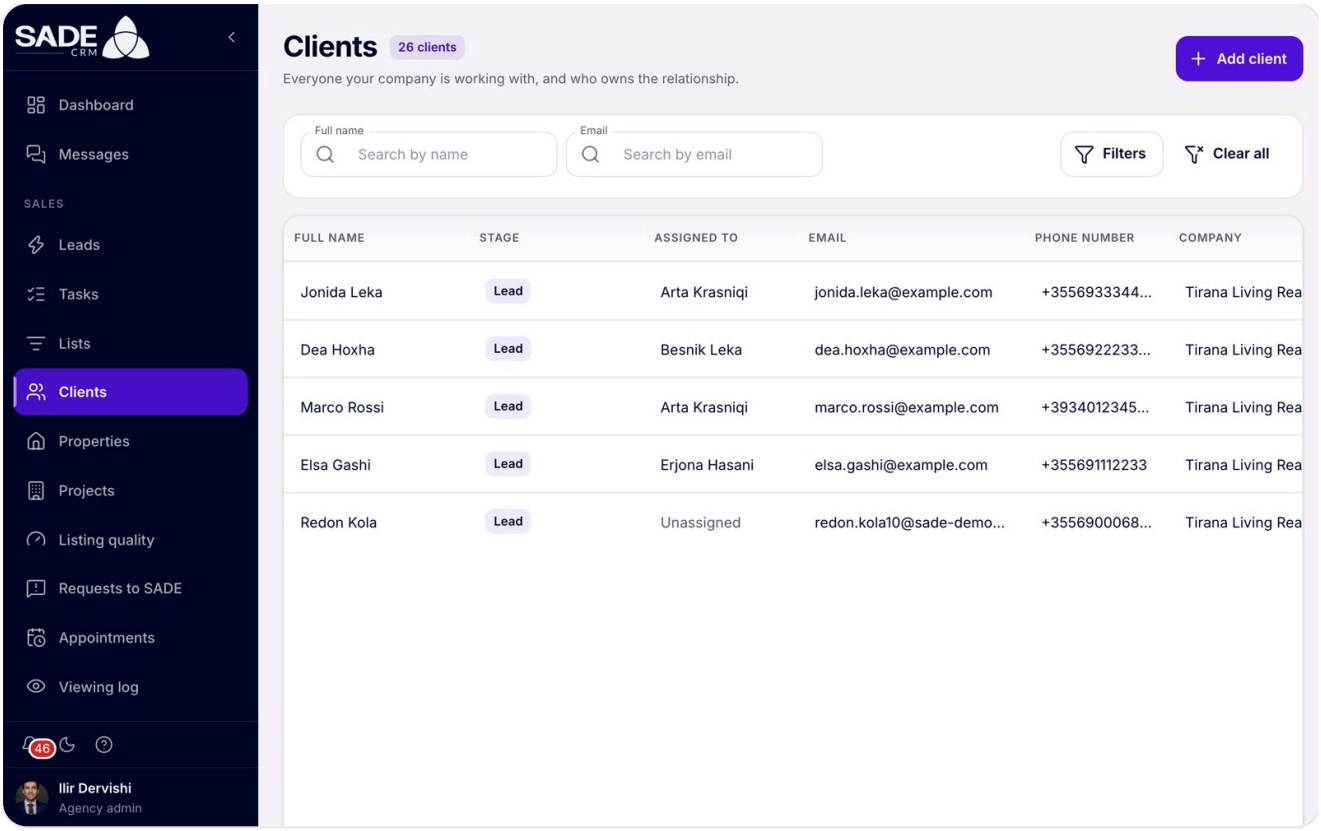
Ilir Dervishi, the agency admin, makes the same kind of list for the whole team, with **Assigned to** set to **Anyone** and **Share with the agency** on. It appears under **Shared with the agency** for everyone. Ilir sees all the agents’ buyers on it; Besnik, Arta and Erjona each see only their own, plus any in the pond.

Clients

The client list, adding and editing clients, everything on a client's page, merging duplicates and deleting a client.

A client is anyone your agency works with: a new lead, a buyer, a tenant or an owner. Leads and clients are the same records. When a lead arrives it becomes a client at the **Lead** stage, and everything that happens with that person afterwards, from enquiries and calls to viewings and deals, collects on one client page.

Agents and agency admins both use Clients. Admins see every client in the agency; agents see the clients they work with. Open it from **Sales → Clients**.



Tirana Living's clients, filtered by name.

The client list

The list shows the newest clients first, 10 to a page by default (you can choose 5, 20 or 50).

Column	What it shows
Full name	The client's name.
Stage	Their lead stage.
Assigned to	Their agent, **Unassigned**, or an **In pond** chip.
Email and **Phone number**	How to reach them.
Company	Your agency.
Status	**Owner** if at least one property is recorded as theirs, otherwise **Buyer**.
Created at	When the client was added.

Search by **Full name** or **Email** at the top, or click **Filters** to narrow the list by **Phone number**, **Status**, **Stage** or the date it was **Created**. **Clear all** removes every filter.

Each row has buttons to view, edit and delete the client. Edit and delete are for agency admins only.

What agents see

An agent's list shows the clients who:

- are assigned to the agent;
- were added by the agent;
- have a viewing or a deal with the agent;
- own a listing assigned to the agent;
- asked about a listing assigned to the agent.

Leads in the pond aren't in an agent's client list unless one of these applies. To find them, use the **Pond** on the Leads page or the **In the pond** list in Lists.

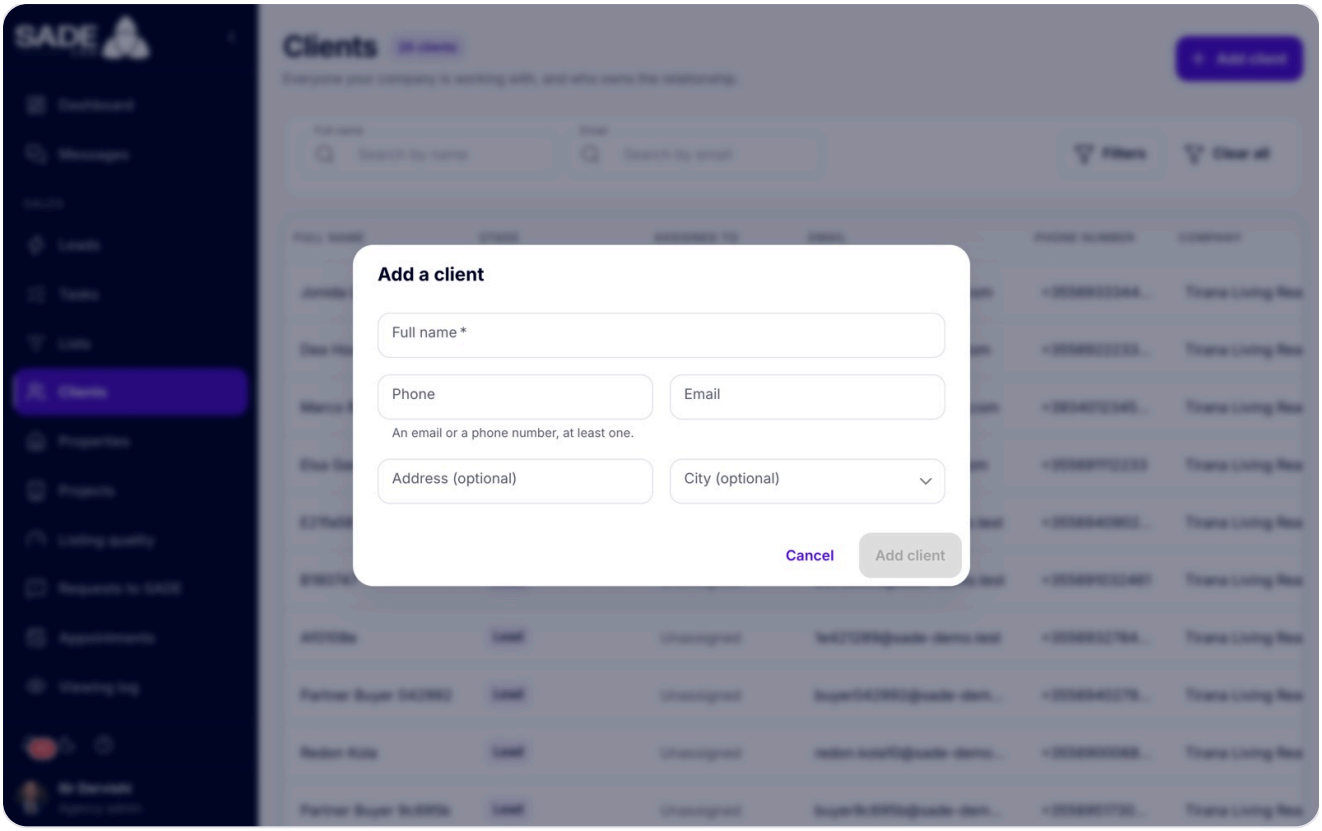
Adding a client

Most clients arrive by themselves as leads. Add one by hand when someone phones the office, walks in, or you meet them at a viewing.

1. Click **Add client**.
2. Fill in the **Add a client** dialog (see the table).
3. Click **Add client**. The CRM says "Client added."

Field	What to enter
Full name	Required. For example "Arben Hoxha".
Phone	For example "069 123 4567".
Email	Their email address.
Address	Optional.
City	Optional. Type to search.

You need an email address or a phone number, at least one, so the person can be reached.



The Add a client dialog.

A client you add by hand starts at the **Lead** stage, with the source **CRM**. If an agent adds the client, the client is assigned to that agent. If an agency admin adds them, they are unassigned, and not in the pond; assign them on the client page. Clients added by hand don't go through routing, have no response clock and don't start action plans by themselves.

When the person is already a client

The CRM recognises people by their email address and phone number, and keeps one record per person. If the email or the phone you enter already belongs to one of your agency's clients, **Add client** saves nothing. The dialog says "This person is already a client." Phone numbers match with or without the country code, so "069 123 4567" and "+355 69 123 4567" are the same person.

- If you may open that client, the dialog shows their name and agent, for example "Arben Hoxha · assigned to Arta Krasniqi", and an **Open client** button that takes you to their page.
- If you may not, it says "They aren't one of your clients, so you can't open them. An agency admin can assign them to you."

Change the email or phone if you typed it wrong, or work with the existing client.

Editing a client

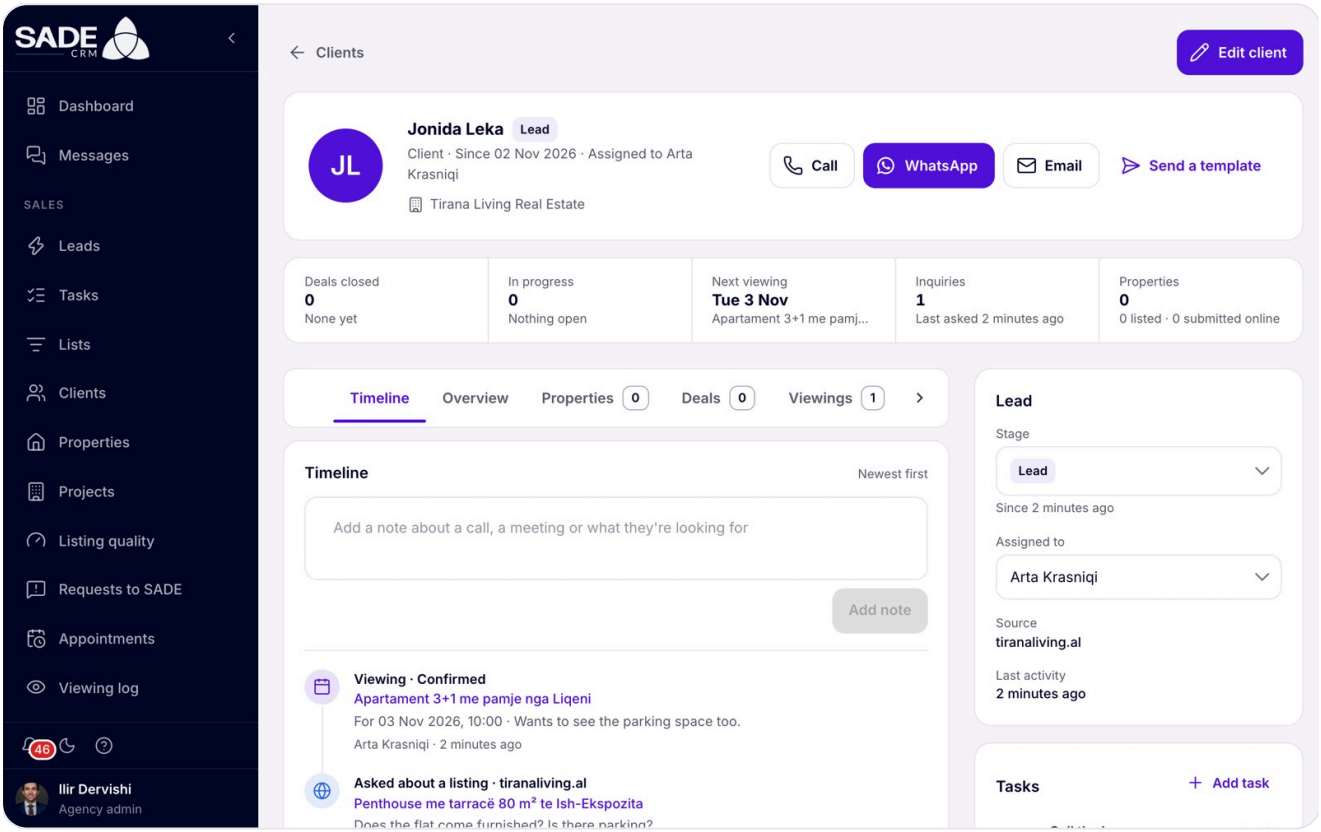
Agency admins can edit a client's details: click **Edit client** at the top of the client page, or the edit button on the client's row in the list. Change the fields and click **Save changes**. The CRM says

“Client updated.”

Agents can’t edit a client’s details, but they can change the stage, log contacts, add notes and tasks, and record consent on the client page.

The client page

Click a client’s name anywhere in the CRM to open their page.



Jonida Leka’s page: a lead from the agency’s website, assigned to Arta, with a viewing booked.

At the top are the client’s name and stage, and a line such as “Client · Since 02 Nov 2026 · Assigned to Arta Krasniqi”. Chips show when the client is a **Property owner**, **Has a website account** on the marketplace, or is **In the pond** (with a **Claim** button). On the right are **Call**, **WhatsApp**, **Email** and **Send a template**; see Following up.

Below that, five tiles sum the client up: **Deals closed**, **In progress**, **Next viewing**, **Inquiries** (with when they last asked) and **Properties**.

The tabs:

Tab	What's in it
Timeline	Everything that has happened with the client, newest first. This tab opens first.
Overview	Their next viewing, deals in progress, and a summary of their activity.
Properties	Properties they own and have listed with you, and anything they submitted on the website.
Deals	Their deals.
Viewings	Viewings coming up and past.
Inquiries	What they asked about, and their messages.

The timeline shows what the client did (enquiries, sign-ups, searches, with the source of each), contacts your team logged with the outcome and note, notes, stage changes, reassignments, merged duplicates, viewings, deals and consent. You can add a note at the top; see Notes on the timeline.

On the right are these cards:

Card	What it holds
Lead	**Stage** (anyone can change it), **Assigned to** (agency admins can change it), **Source** and **Last activity**.
Tasks	The client's tasks, with **Add task**. See Tasks and action plans.
Action plans	Plans running or run for the client, with **Start** and **Stop**.
Marketplace	Shown when one of your agents is the client's agent on the SADE marketplace: until when, their saved homes, and their saved searches with how often they get alerts.
Consent	What the client has agreed to, by channel.
Details	Email, phone, address, city, company, client since, who added them, and their website account, with buttons to copy.

Recording consent

The **Consent** card shows, for **Email**, **SMS**, **WhatsApp** and **Phone**, whether the client agreed to **Contact** (contacting them about their request) and to **Marketing** (for example new listings): **Not asked**, **Agreed** or **Declined**, and where it was given.

Consent given on your website form or on the marketplace is recorded by itself. For consent given on the phone or in person:

1. On the **Consent** card, click **Record consent**.
2. Choose the **Channel** and what it is **For**.
3. Choose **They agreed** or **They declined**.
4. Write down what they agreed to, in their words or as close as you can get. This is your proof, and it is required when they agree.
5. Save. The CRM says “Consent recorded”, and the consent appears on the timeline.

Anyone in the agency can record consent.

Duplicates and merging

When another client in your agency has the same email address or the same phone number, a banner at the top of the client page says “Possible duplicate:” and the other client’s name. The CRM compares numbers and addresses ignoring spaces, upper and lower case and the country code, so “069 111 2233” and “+355 69 111 2233” count as the same. Names alone are never matched.

New leads don’t create duplicates: an enquiry from someone already in your CRM is added to their existing record, and **Add client** refuses a person who is already there. Duplicates come mainly from details changed by hand later, for example a phone number added to one client’s record that another client already has.

To merge two records, open the one you want to keep:

1. Click **Review** on the banner. The dialog lists the records that share an email address or phone number with this client.
2. Click **Merge into this client** on the record to fold in.
3. Read the confirmation and click **Merge and delete the other record**. The CRM says, for example, “Elsa Gashi was merged into this client”.

Only agency admins can merge. Agents see the banner with the message “An admin can merge them if they are the same person.”

Everything on the other record moves to the one you keep: enquiries, viewings, deals, properties, website submissions, notes, contacts, consent, tasks, action plans and any open response clock. The kept record fills any gaps (phone, email, address, city, agent, source) from the other one, and keeps the earlier creation date. The other record’s email and phone are written on the timeline, in the “Merged a duplicate” entry, and the other record is deleted. This can’t be undone.

Deleting a client

Agency admins can delete a client from the client list:

1. Click the delete button on the client's row.
2. Confirm with **Delete**. The CRM says "Client deleted".

Deleting can't be undone. Some clients can't be deleted, and the CRM says why:

The client has	The CRM says
Properties, deals, enquiries or website submissions	"This client has linked records:" and how many of each, for example "This client has linked records: 1 property, 2 deals." That includes most leads, because their first enquiry is kept on record.
A **Pending** viewing	"This client has a pending viewing. Cancel it or mark it done, then delete the client." Change the viewing's status on the calendar, then try again.

> **Tip:** to get a lead out of the way without deleting it, move it to the **Trash** stage. Its clock and action plans stop, and its history stays.

Example

EXAMPLE

On Tuesday a man phones Tirana Living's office about selling his flat near the Artificial Lake. Ilir Dervishi, the agency admin, searches the client list by the caller's phone number, 069 455 1201, and finds nobody. He clicks **Add client** and enters "Klodian Meta", the phone number and the city Tiranë, then clicks **Add client**.

Klodian starts as an unassigned **Lead** with the source **CRM**. Ilir opens his page, sets **Assigned to** to Besnik Leka and adds a note: "Owner, 2+1 near the Lake, wants a valuation this week."

On Friday Klodian asks a question on the SADE marketplace from the same phone number. The CRM recognises the number, so the enquiry appears on his existing timeline under the source SADE Marketplace, and goes to Besnik, who already works him. His **Source** on the **Lead** card stays **CRM**, where he first came from.

A week later Erjona Hasani notices a banner on Elsa Gashi's page: "Possible duplicate: Elsa Gashi". A second record for Elsa, made under her work email with no phone, had just had her mobile number added by hand, written another way than on her original record. Ilir clicks **Review**, then **Merge into this client** on the newer record. Its notes move to Elsa's original record, and the copy is deleted.

CHAPTER 4

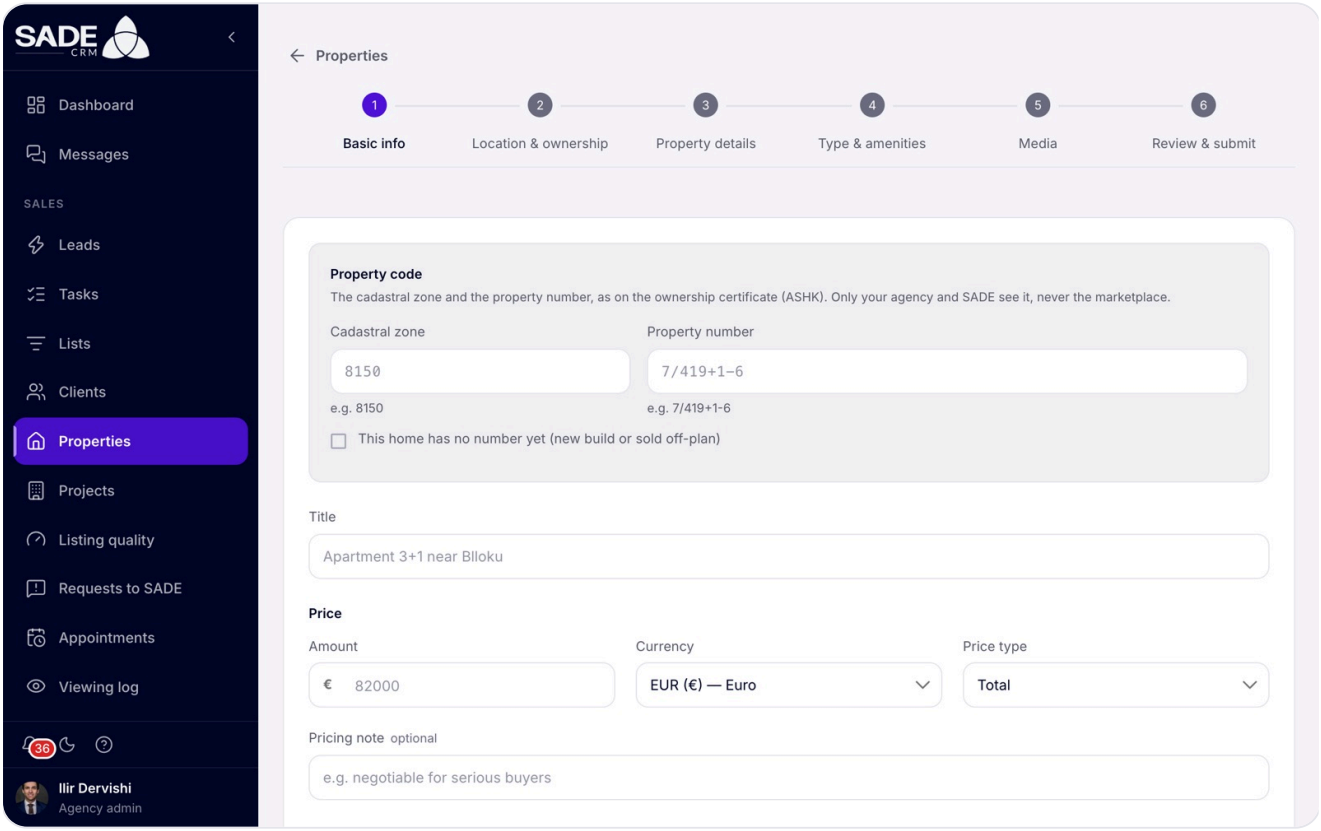
Listings

Adding a listing

The six steps of the Add property wizard, field by field, with what is required, the owner, the map pin, photos, the property code and your plan's listing limit.

A listing is one home or commercial space your agency offers for sale or rent. The CRM calls it a **property**. Agency admins and agents add listings with a six-step wizard. Each new listing is sent to SADE for review and starts as **Pending**; it goes on the SADE marketplace once SADE approves it and your agency is verified.

To start, open **Properties** in the menu and click **Add property**. The steps are shown across the top: **Basic info**, **Location & ownership**, **Property details**, **Type & amenities**, **Media** and **Review & submit**.



Step 1 of the wizard in an Albanian agency, where the property code comes first.

How the wizard works

1. Fill in the step and click **Next**. The CRM checks the step first and will not move on until it is complete. What is missing is shown in red under each field.

2. Use **Back** to return to an earlier step. The footer shows **Step 2 of 6** and so on.
3. On the last step, click **Create property**.

If SADE has not finished setting up the cities, property types or amenities for your country, the wizard shows “This listing can’t be created yet” and the form is switched off. Let SADE know, and try again once it is done.

> **Note:** the wizard keeps a draft in your browser as you type: the step you were on and every field, **except the photos and videos**. If you leave and come back to **Add property** on the same computer and browser, your text is still there, but you need to add the files again. The draft is cleared when the listing is created.

Basic info

Field	What to enter
Property code	The home’s official number. Only in countries that have one; see Property code below.
Title	Required. A short headline, for example “Apartament 2+1 me ballkon në Bllok”.
Amount	Required. The price, as a number of 0 or more.
Currency	Required. Euro is selected to start with.
Price type	**Total** (the default), **Per m²**, **Per month** or **On request**. The amount is required whatever you choose.
Pricing note	Optional. For example “negotiable for serious buyers”.
Description	Required. A text box with headings, bold, italic and lists.

Currencies

You can price a listing in any of these currencies, in every country: Euro (EUR), Albanian lek (ALL), Macedonian denar (MKD), Romanian leu (RON), Moldovan leu (MDL), Australian dollar (AUD), Canadian dollar (CAD), Swiss franc (CHF), Chinese yuan (CNY), British pound (GBP), Japanese yen (JPY), New Zealand dollar (NZD) and US dollar (USD).

The currency is a label on the amount. Changing it later does not convert the price. On the listing’s marketplace page, the price shows as you entered it, with an approximate conversion into the country’s usual currencies beside it, marked “≈” (in Albania, for example, euros and lek).

Property code

In countries with an official property number, the code is the first field of the wizard. Only your agency and SADE see it. It never appears on the marketplace or in feeds.

- **Albania:** required. Enter the **Cadastral zone** (for example 8150) and the **Property number** (for example 7/419+1-6), as on the ownership certificate (ASHK).
- **Italy, Greece, Bulgaria, Romania, Slovenia, Croatia, Spain, Portugal and France:** optional. The fields carry the country's own name for the number, such as "Riferimento catastale" in Italy or "Referencia catastral" in Spain.
- **Other countries:** there is no property code field.

As you type, the CRM checks the code and shows **Available** or **Already listed by another agency**. A home can be listed by only one agency at a time. If the home has no number yet, tick **This home has no number yet (new build or sold off-plan)**.

If another agency already holds the code, the listing is not saved and the wizard goes back to this step. You are not told which agency it is. If the owner signed an exclusive contract with you, click **Ask SADE to look into it**. See Property codes for how this works.

Location and ownership

Address

Field	What to enter
City	Required. Type two or three letters and pick the city from the list. Only cities SADE has set up for your country can be chosen.
Address	Required. Street, building, entrance.
Zip code (optional)	Optional.

The map pin

The **Pin** is required. Search for a street, building or place (at least 3 letters), or click on the map where the building is. Drag the pin to adjust it, or use **Centre** and **Remove pin**.

When you place the pin, the CRM looks up the address and fills in the address, neighbourhood and zip code if they are empty. If you have already typed an address, it offers the one from the map with **Use this** instead of overwriting yours. If the pin is outside the city you chose, you see a warning so you can check one or the other.

Field	What to enter
Neighbourhood	Optional, up to 120 characters. For example Blloku or Komuna e Parisit. Market prices group listings by this name.
How to find it	Optional, up to 300 characters. A landmark or directions for viewings. Only your agency sees it.
Show the exact location on the website	Off by default.

The public area

The switch **Show the exact location on the website** decides what the marketplace shows:

- **Off** (the default): visitors see a shaded area of about 300 m around the building, so the owner's address stays private.
- **On**: visitors see the pin on the building.

Inside the CRM, your team always sees the exact pin.

The owner

Owner is required. Search your agency's clients by name and pick one.

If the owner is not a client yet, click **Add a new owner** (or **Add "Name" as a new owner** once you have typed a name). The **Add the owner** dialog asks for:

Field	What to enter
Full name	Required.
Phone	A phone number.
Email	An email address.
Address (optional)	Optional.
City (optional)	Optional.

You need an email or a phone number, at least one. **Add owner** stays greyed out until the name and one of them are filled in. The owner is saved as one of your agency's clients and picked for the listing. The owner is never shown on the marketplace.

If the email or phone already belongs to one of your clients, nothing is saved and the dialog says "This person is already a client." Pick that client as the owner instead of adding them again. If you

may open the client, the dialog shows their name and agent, and **Open client** opens their page in a new tab, so the listing you are adding stays open.

The assigned agent

- **An agent** sees **You**: you are the agent on the listings you create.
- **An agency admin** can search the agency's people and pick an agent. Leave it empty and the listing is yours.

The assigned agent handles the listing's viewings and enquiries, and gets its notifications.

Property details

A chip at the top reads **Starts as Pending**: you do not choose the status when you create a listing.

Field	What to enter
Listing type	Required. **For sale** or **For rent**.
Bedrooms	Required. 0 to 50.
Bathrooms	Required. 0 to 50.
Floor area	Required. In m². In the United Kingdom you enter square feet and the CRM converts them.
Year built	**Not specified**, or a year from 1850 to five years from now.
Energy class	Only in countries with an energy certificate; see below.
Available from	Required. The first date the home can be shown.
Viewing days	Required. **Anytime**, **Weekends only** or **Weekdays only**.

Energy class

Where your country has an energy certificate, the field is labelled with its name, for example **Energy class (APE)** in Italy, and it is required. Choose the class, or tick **No certificate needed (land, garage…)**. Without one of the two, **Next** stops with "Choose the energy class, or tick that no certificate is needed."

Country	Certificate	Classes
Italy	APE	A4, A3, A2, A1, B, C, D, E, F, G
Greece	ΠΕΑ	A+, A, B+, B, C, D, E, F, G
Bulgaria	EPC	A to G
Romania	CPE	A to G
Slovenia	EI	A1, A2, B1, B2, C, D, E, F, G
Croatia	EPC	A+, A, B, C, D, E, F, G
Spain	CEE	A to G
Portugal	CE	A+, A, B, B-, C, D, E, F
France	DPE	A to G
Belgium	PEB	A++, A+, A, B, C, D, E, F, G
Luxembourg	CPE	A to I
Germany	Energieausweis	A+, A, B, C, D, E, F, G, H
Austria	Energieausweis	A++, A+, A, B, C, D, E, F, G
Cyprus	EPC	A to G
Malta	EPC	A to G
Ireland	BER	A1, A2, A3, B1, B2, B3, C1, C2, C3, D1, D2, E1, E2, F, G
United Kingdom	EPC	A to G
Albania, Kosovo, Montenegro, North Macedonia, Switzerland, Moldova, San Marino	none	The field is not shown.

Type and amenities

Field	What to enter
Property type	Required. For example Apartment, Villa, Office or Building plot.
Amenities	Optional. Tick the ones that apply.

The amenities offered depend on the type, so choose the type first. Changing the type clears the amenities you ticked. Search the list (for example “Parking, balcony, lift...”), use **Show all** to see more than the first 20, and **Select all visible** or **Clear all**.

Property types and amenities are the same for every agency. SADE keeps the lists; you pick from them.

Media

Drop photos and videos on the box, or click it to choose files. You can add several at once, and remove any with **Remove**. At least one photo or video is required.

Rule	Limit
Size of each file	Up to 25 MB, photos and videos alike
Size of each photo	Up to about 50 megapixels
Everything added at once	Up to 300 MB
Photo types	.jpg, .jpeg, .png, .webp, .gif, .bmp, .tif, .tiff. HEIC and AVIF photos are not taken: save them as JPG first.
Video types	.mp4, .mov, .m4v, .avi, .wmv, .mkv, .webm

A file that breaks one of these rules is not added. The box says “Not added:” and names each file with the reason, for example “over 25 MB” or “not a photo or video SADE can take”. The other files you picked are added.

Some problems only show when SADE saves the file, such as a photo over 50 megapixels. The listing is then created without that file, and the CRM says “Saved without these files:” with each file and why. Fix them and add them on the listing’s **Edit** page.

- The first photo you add becomes the cover. Add your best photo first.
- Location and camera details stored inside photos are removed before they are saved.
- Single listings have no floor plans and no video link field; upload the video file itself.

> **Tip:** listings with 8 photos or more get full marks for photos in the quality score, and higher scores rank higher on the marketplace.

Review and submit

The last step shows everything you entered, with an **Edit** link for each section. It also shows what the website will show of the location (“Exact pin” or “Area of about 300 m around it”), your amenities, up to six of your photos and the property code (or “No number yet”).

Click **Create property**. The CRM says: “Your property has been created and sent for review. You will be notified once our moderators complete the approval process.”

What happens next

- The listing appears in **Properties** with the status **Pending**. It is not on the marketplace yet.
- If an agent created it, every agency admin gets a notification, “New Property Created”.
- If an agency admin created it for another agent, that agent gets a notification and an email.
- SADE’s moderators review it. See Review and publishing.

Your plan’s listing limit

Each plan allows a number of listings; see the plans. Every listing in your Properties list counts, whatever its status: pending, published, rejected, blocked, sold, rented or withdrawn. At the limit, the CRM refuses a new listing with “Property limit reached.” Deleting a listing frees a place, or you can change your plan.

In an Enterprise organization, the limit is the organization’s contract, shared by all its agencies. The message is then “The organization’s listing limit is reached.”

> **Note:** you can also add listings from the phone app, with the camera and your phone’s location for the pin. See The mobile app. To add many listings at once, use a spreadsheet import.

EXAMPLE

Arta Krasniqi, an agent at Tirana Living Real Estate, takes on a two-bedroom flat in Blloku. She opens **Properties** and clicks **Add property**.

- **Basic info:** Cadastral zone 8150, Property number 7/419+1-6, which shows **Available**. Title "Apartament 2+1 me ballkon në Bllok", Amount 168000, Currency Euro, Price type **Total**, and a description of about 450 characters.
- **Location & ownership:** City Tiranë, the street and building, then she searches the address and drops the pin on the building. The neighbourhood fills in as Blloku. She leaves **Show the exact location on the website** off. The owner, Drita Shehu, is not a client yet, so Arta types her name, clicks **Add "Drita Shehu" as a new owner**, enters her phone number and clicks **Add owner**. **Assigned agent** shows **You**.
- **Property details:** For sale, 2 bedrooms, 1 bathroom, 85 m², built 2018, available from today, viewings **Anytime**. There is no energy class field, because Albania has none.
- **Type & amenities:** Apartment, with Elevator, Balcony and Air conditioning.
- **Media:** nine photos, the living room first.

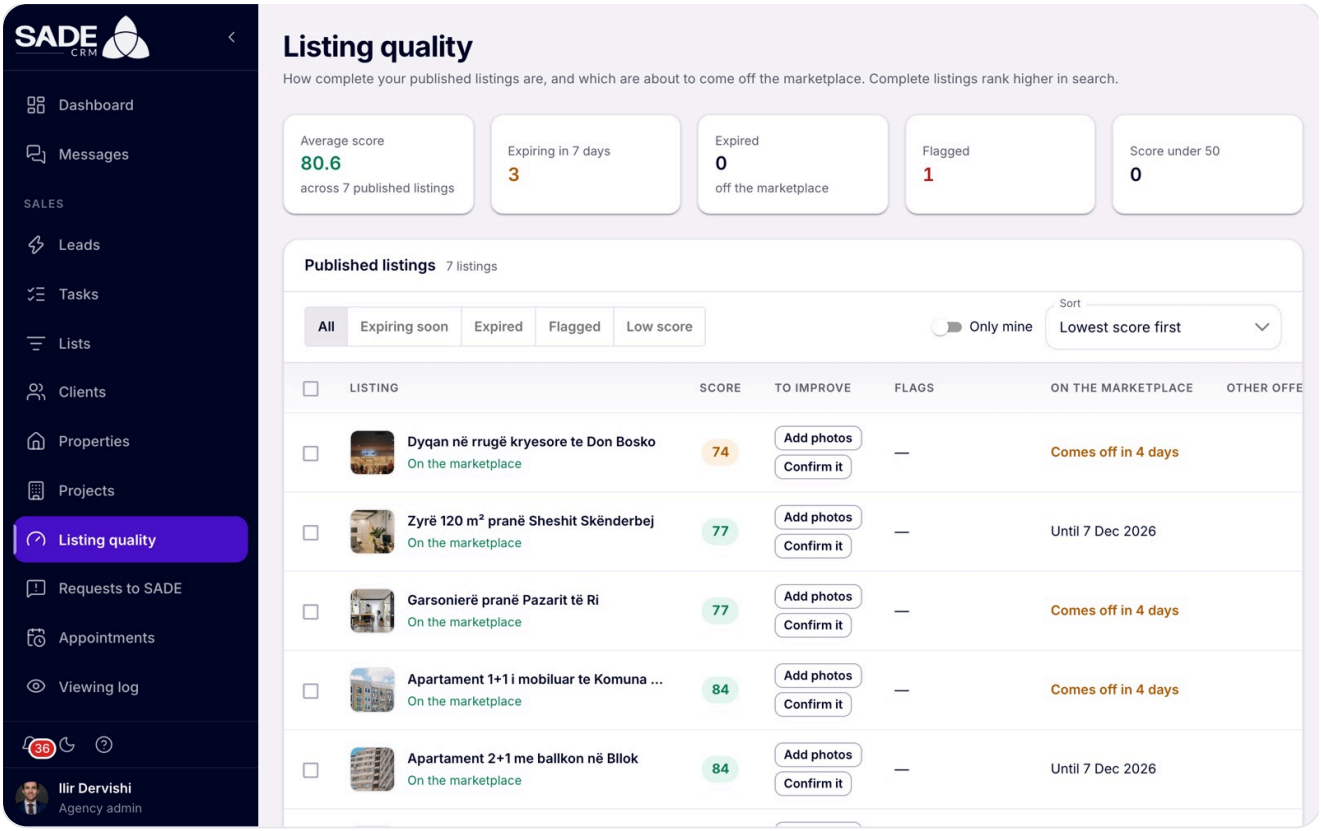
She checks the review and clicks **Create property**. The flat appears in Properties as **Pending**, and Ilir Dervishi, the agency admin, gets a "New Property Created" notification.

Listing quality and expiry

The quality score and how to raise it, how long a listing stays on the marketplace, "Still available", flags, and confirming many listings at once.

The SADE marketplace only shows listings that someone at the agency has recently confirmed are still for sale or rent. A listing that nobody confirms comes off the marketplace by itself. Each published listing also has a quality score out of 100, and higher scores rank higher in marketplace search.

The **Listing quality** page, under **Sales** in the menu, brings this together for agency admins and agents: the score of each published listing, what would raise it, any flags, and when each listing comes off the marketplace. The same information is in the **Listing quality** card on every published listing's page.



Three listings come off in 4 days and one is flagged.

How long a listing stays on the marketplace

A published listing stays on the marketplace for a set period after it was last confirmed:

Listing type	Period
For sale	60 days
For rent	30 days

These things confirm a listing and start the period again:

- creating it, and SADE approving it;
- saving a change to what the listing says (price, text, details, photos, amenities), from the web, the phone app or an import;
- clicking **Still available**.

Reminders

Seven days before a listing would come off, the assigned agent gets a reminder by notification and by email: “Confirm your listing”. If nobody is assigned, the agency admins get it. Several listings for the same person come in one email.

When a listing expires

If nobody confirms it in time, the listing comes off the marketplace on its date. Its marketplace page then says it is no longer available, and it stops appearing in search. The same people get a notification and an email: “Listing taken off the marketplace”.

An expired listing keeps the status **Published** in the CRM. Only the Listing quality page and the listing’s quality card show that it has expired. Confirming it brings it back on the marketplace at once.

Confirming a listing

Only confirm a home that is still for sale or rent. When a home is sold or rented through your agency, close the deal instead, so the listing becomes **Sold** or **Rented** and leaves the marketplace.

One listing, from its page:

1. Open the listing from **Properties**. If you came from a reminder, the page scrolls to the **Listing quality** card and outlines it.
2. In the card, click **Still available**. The CRM says “Confirmed: it stays on the marketplace”.

One listing, from Listing quality: click **Still available** at the end of its row.

Several at once:

1. On **Listing quality**, tick the rows, or tick **Select this page** at the top of the table.
2. Click **Still available (3)** (the number is how many you ticked).
3. The dialog asks “Confirm 3 listings?” and reminds you to confirm only homes still for sale or rent. Click **Still available**.

The CRM says how many were confirmed, for example “3 listings confirmed.”, and how many were not because they are no longer published. You can confirm up to 500 listings at a time. **Clear** empties the selection.

> **Tip:** editing a listing confirms it too, so a listing you have just updated does not need **Still available**.

The Listing quality page

The page lists your agency’s **published** listings, whether they are on the marketplace now or have expired. Listings waiting for review, rejected, sold or rented are not here.

Tiles

Click a tile to filter the table:

Tile	What it counts
Average score	The average score across your published listings.
Expiring in 7 days	Listings that come off the marketplace within a week.
Expired	Listings already off the marketplace.
Flagged	Listings with an open flag.
Score under 50	Listings with a low score.

Filters and sorting

- Filter buttons: **All**, **Expiring soon**, **Expired**, **Flagged**, **Low score**. **Expiring soon** and **Expired** sort the list by **Expiring first**.
- **Only mine** shows only the listings assigned to you.
- **Sort**: **Lowest score first** (the default), **Highest score first** or **Expiring first**.
- **Rows** sets how many listings show on a page.

Columns

Column	What it shows
Listing	The photo, the title, and whether it is on the marketplace now.
Score	The score out of 100.
To improve	Up to three tips that would raise the score, or “Nothing to add”.
Flags	Open flags, if any.
On the marketplace	“Until 7 Dec 2026”, “Comes off in 4 days”, “Comes off today” or “Expired” with the date.
Other offers	If other agencies list the same home: how many, and whether search shows yours.

The quality score

The score runs from 0 to 100 and is made of these parts:

Part	Points	Full marks when
Photos	25	The listing has 8 photos or more. Fewer photos get a share of the points. Videos don’t count.
Description	15	The description has 400 characters or more.
Details	15	Area, type, year built, and for homes the bedrooms and bathrooms, are filled in. Land needs no year built.
On the map	10	The pin is placed. A neighbourhood without a pin counts half.
Price	10	The listing has a price and no open price flag.
Recently confirmed	15	Confirmed in the last 14 days. Within its period but not in the last 14 days: 8. Expired: 0.
Verified agency	10	Your agency is verified by SADE.
Open flags	minus 15 each	Each open flag takes 15 points off.

The score never goes below 0. It is updated every 15 minutes for listings that changed.

On the marketplace, the default order mixes the score with how recently the listing was first published. Confirming a listing does not make it new again, but a complete, recently confirmed listing ranks higher than an incomplete one.

Raising the score

Each tip in **To improve**, and in the card on the listing’s page, points to one part:

Tip	What to do
Add photos	Edit the listing and add photos, up to 8 or more.
Longer description	Write at least 400 characters.
Add details	Fill in area, type, year built, bedrooms and bathrooms.
Place on the map	Edit the listing and put the pin on the building.
Add a price / **Check the price**	Add the price, or check it against similar listings.
Confirm it	Click **Still available**, or edit the listing.
Verify your agency	An agency admin sends SADE the documents under **Settings → Verification**. See Verification.
Resolve flags	See Flags below.

Saving an edit also confirms the listing, so adding photos raises both **Photos** and **Recently confirmed**.

Flags

A flag is a possible problem raised by SADE's automatic checks or by visitors to the marketplace. It shows in the **Flags** column and on the listing's quality card. Only SADE's moderators close flags, except where the table says otherwise.

Flag	What it means	What to do
Unusual price	The price per m² is far below or far above the median of similar listings in the area (same city, type, and sale or rent).	If the price is right, leave it: SADE's moderators will check. If it is a typo, fix it. The flag closes by itself once the price is back in range.
Photos used elsewhere	Some photos also appear on an older listing of a different home.	Use your own photos of this home.
Possible duplicate	The listing looks like another of yours, or another listing of the same home.	If it is the same home, remove one of your listings. Otherwise SADE's moderators will decide.
Reported by visitors	Visitors reported it, with reasons such as "no longer available" or "wrong price".	Check the listing is right and still available. SADE's moderators will look at it.
No property code	The listing has no cadastral number.	Add the code when you edit the listing, once the home has one. No points off.

Every open flag except **No property code** takes 15 points off the score.

The same home listed by several agencies

When two or more agencies list the same home, the marketplace shows it once in search: the listing with the highest quality score. SADE compares public listings every 30 minutes, by place, type, size, price, pin and photos.

The **Other offers** column, and **Also listed by** on the listing's card, tell you whether search shows your listing or another offer with a higher score. To be the one shown, raise your score.

> **Note:** on the phone app, **Listings to confirm** under **More** lists your expiring and expired listings and confirms them one by one or several at once. See The mobile app.

EXAMPLE

On Monday morning Ilir Dervishi opens **Listing quality** at Tirana Living Real Estate. The tiles show 7 published listings with an average score of 80.6, **Expiring in 7 days** 3, and **Flagged** 1.

He clicks the **Expiring in 7 days** tile. The three listings come off in 4 days. He checks with Arta and Erjona that all three are still on the market, ticks them, clicks **Still available (3)** and confirms. The CRM says "3 listings confirmed." Each one for sale stays on the marketplace for another 60 days from today, and each one for rent, like the furnished 1+1 at Komuna e Parisit, for another 30.

Next he clicks **Flagged**. Arta's penthouse at Ish-Ekspozita shows **Unusual price**: when she lowered the price last week, she typed €39,500 instead of €395,000. Arta edits the price and saves. The flag closes by itself once SADE's check sees the price is back in range.

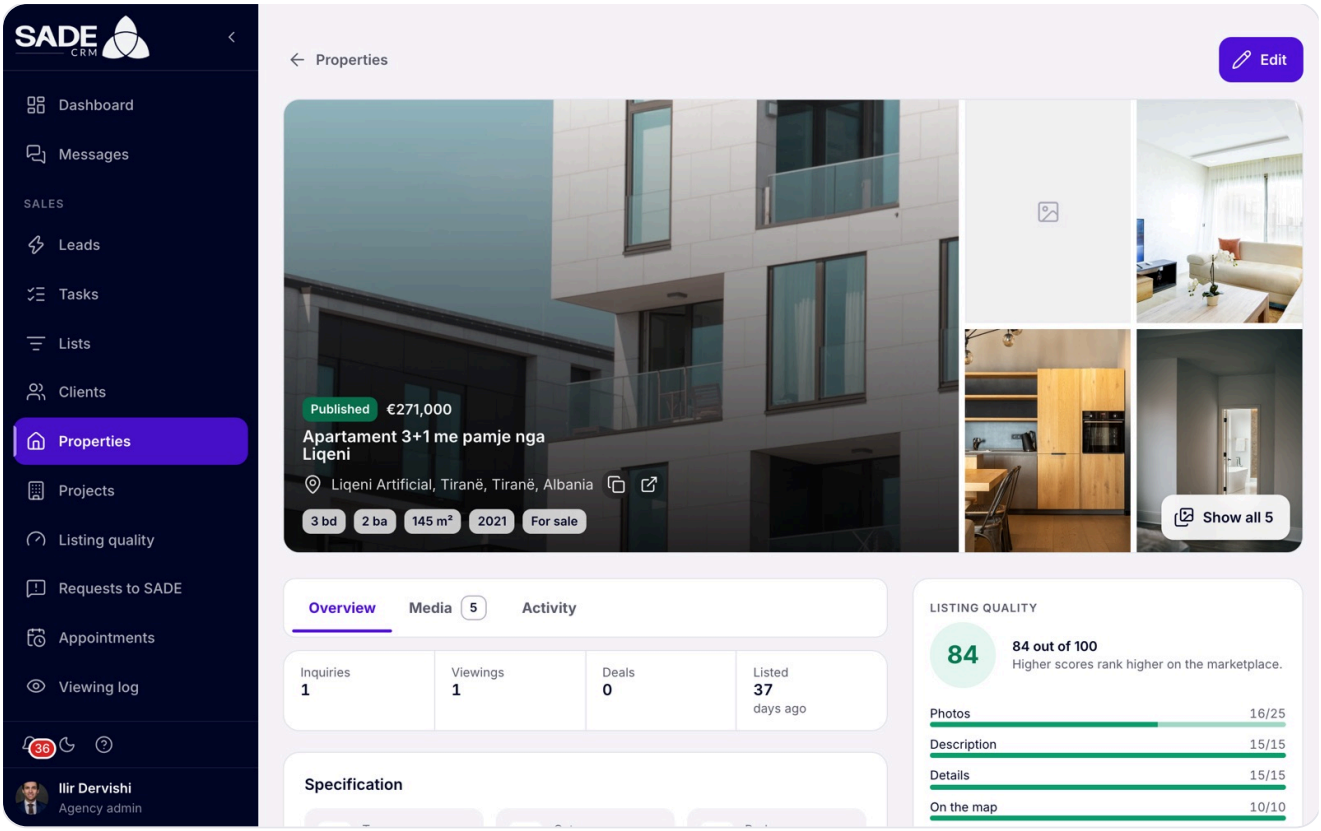
Last, Erjona's "Apartament 3+1 me pamje nga Liqeni" scores 84: it has 5 photos, so **Photos** gives 16 of 25, and it was last confirmed more than 14 days ago, so **Recently confirmed** gives 8 of 15. Erjona adds three more photos and saves. With 8 photos and a fresh confirmation, the listing reaches 100 at the next update.

Review and publishing

What SADE checks before a listing goes public, what each status means, fixing a rejected listing, why your agency must be verified, what buyers see on the marketplace, and how their enquiries come back to you as leads.

Every listing you add in the CRM, on the web or the phone app, is checked by SADE's moderators before it goes public. Until then it is **Pending**. Once a moderator approves it, it becomes **Published** and appears on the SADE marketplace at sadegre.com, provided your agency is verified. There is no separate "publish to marketplace" switch: a public listing is on the marketplace automatically.

When a buyer contacts you about a published listing, the enquiry comes straight back into the CRM as a lead.



A published listing. The badge on the photo shows its status.

What SADE checks

A moderator opens each new listing and either approves it or rejects it with a reason. The reasons moderators can choose from show what they look at:

- the photos are missing or unclear;
- the price looks wrong;
- the address or location is incomplete;
- the description needs more detail;
- the property is already listed.

A moderator can also write a reason of their own.

> **Tip:** before you click **Create property**, check that the photos are your own and sharp, the price is typed correctly, the pin is on the building and the description says enough for a buyer to want a viewing. The quality score rewards the same things.

Listing statuses

Status	What it means	On the marketplace?
Pending	Created and waiting for SADE's review. Every listing added in the CRM starts here.	No
Published	Approved by SADE.	Yes, if your agency is verified and the listing is not blocked or expired.
Rejected	Turned down by SADE, with a reason. Fix it and save it to send it back.	No
Blocked	Hidden by SADE's moderators. See Blocked by SADE.	No
Sold	A deal on the listing (for sale) was completed.	No
Rented	A deal on the listing (for rent) was completed.	No
Withdrawn	Taken off by its spreadsheet or feed: marked as withdrawn there, or no longer in it.	No

The statuses change through SADE's review, through deals and through imports. You can't choose a listing's status yourself: on the edit page the **Status** field only shows it, with the hint "SADE publishes the listing once it's approved. Sold and Rented come from closing a deal."

When SADE approves a listing

- The status becomes **Published**.
- The listing's assigned agent gets a bell notification, "SADE approved "title"", with "The listing was approved and is now published." Clicking it opens the listing.
- The listing's marketplace period starts: 60 days for sale, 30 days for rent, before it needs confirming. See Listing quality and expiry.
- If your agency is verified, the listing appears on the marketplace within minutes.

When SADE rejects a listing

- The status becomes **Rejected**.
- The listing's assigned agent gets a bell notification, "SADE didn't approve "title"", with the moderator's reason. Clicking it opens the listing. If the listing has no agent, the agency admins get it.

- The same people get an email, “SADE didn’t approve your listing: title”, with the reason and an **Open the listing** button.
- The listing’s page shows the reason in a box headed “SADE didn’t approve this listing”, with a **Fix the listing** button.

Fixing a rejected listing

1. Open the listing and click **Fix the listing**, or click the pencil in the **Properties** list.
2. The edit page shows SADE’s reason at the top. Change what SADE asked for, for example add sharper photos or correct the price.
3. Click **Save changes**.

The CRM says “Saved and sent back to SADE for review.” The listing is **Pending** again and goes back to SADE’s moderators, who see the earlier reason. You need to change at least one thing: if nothing has changed, the CRM says “No changes to save.”

If you would rather not list the home, delete the listing instead. See Deleting a listing.

Published is not the same as public

A listing is on the marketplace only when all of these are true:

1. its status is **Published**;
2. it is not blocked;
3. it has not expired (someone confirmed it within its period);
4. your agency is **verified** by SADE.

If a published listing is not on the marketplace, check these four in that order. The **Listing quality** card on the listing’s page tells you if it has expired.

Your agency must be verified

Everything in the CRM works from the day you sign up, but nothing goes on the marketplace until SADE has verified your agency. The agency admin sends the business number and documents under **Settings → Verification**; see Verification. Once your agency is verified, its published listings appear on the marketplace without any further step.

On the marketplace, verified agencies carry the **Verified agency** badge, with the explanation that SADE checked the agency against the business register before its homes could be listed. Being verified is also worth 10 points of each listing’s quality score.

Listings from imports and feeds

New listings that come from a spreadsheet import or a feed depend on your agency’s verification:

- **Verified agency:** they are created as **Published** straight away and appear on the marketplace without waiting in SADE's review queue. SADE's moderators look at them afterwards, and can block one.
- **Not verified yet:** they are created as **Pending** and wait for SADE's review, like listings you add by hand.

See Imports and feeds.

What buyers see on the marketplace

A listing appears on the marketplace of your agency's country, in the visitor's language. Its page shows:

Shown	Details
Photos and video	All the media you uploaded, with the first photo as the cover.
Price	As you entered it, with an approximate conversion into the country's usual currencies.
Facts and features	Type, category, bedrooms, bathrooms, living area, year built, energy class, availability, amenities and your description.
Dates	When it was listed and when it was last updated.
Location	A shaded area of about 300 m, or the exact pin if you switched on **Show the exact location on the website**.
Your agency and agent	With the **Verified agency** badge.
Contact buttons	**WhatsApp**, **Call**, **Request a viewing**, or a message.

The marketplace **never** shows the property code, the **How to find it** directions or the owner.

If several agencies list the same home, search shows it once (the listing with the highest quality score), and its page lists the other agencies under "Also offered by".

Changes after publishing

When you edit a published listing, the change shows on the marketplace shortly after you save it. Saving also confirms the listing for another period.

How enquiries come back as leads

Every contact from the marketplace about your listing, from the website or its phone app, is recorded first as a **lead** in your CRM, tied to the listing:

- a message;
- a viewing request;
- a tap on **Call** or **WhatsApp**. The visitor sees the agent's (or the agency's) number only after the lead is recorded.

Your lead routing decides who gets the lead, and the agent is notified straight away. See Leads for how to work it.

The enquiry also shows on the listing's page: it is counted under **Inquiries** at the top, and listed on the **Activity** tab.

EXAMPLE

Besnik Leka adds "Apartament 2+1 me garazh" in Kodra e Diellit on a Tuesday afternoon. It shows in Properties as **Pending**.

On Wednesday morning a SADE moderator approves it. Besnik gets a bell notification: "SADE approved "Apartament 2+1 me garazh"". Tirana Living Real Estate is verified, so the flat is on sadegre.com a few minutes later, with the **Verified agency** badge and a shaded area around Kodra e Diellit instead of the exact building.

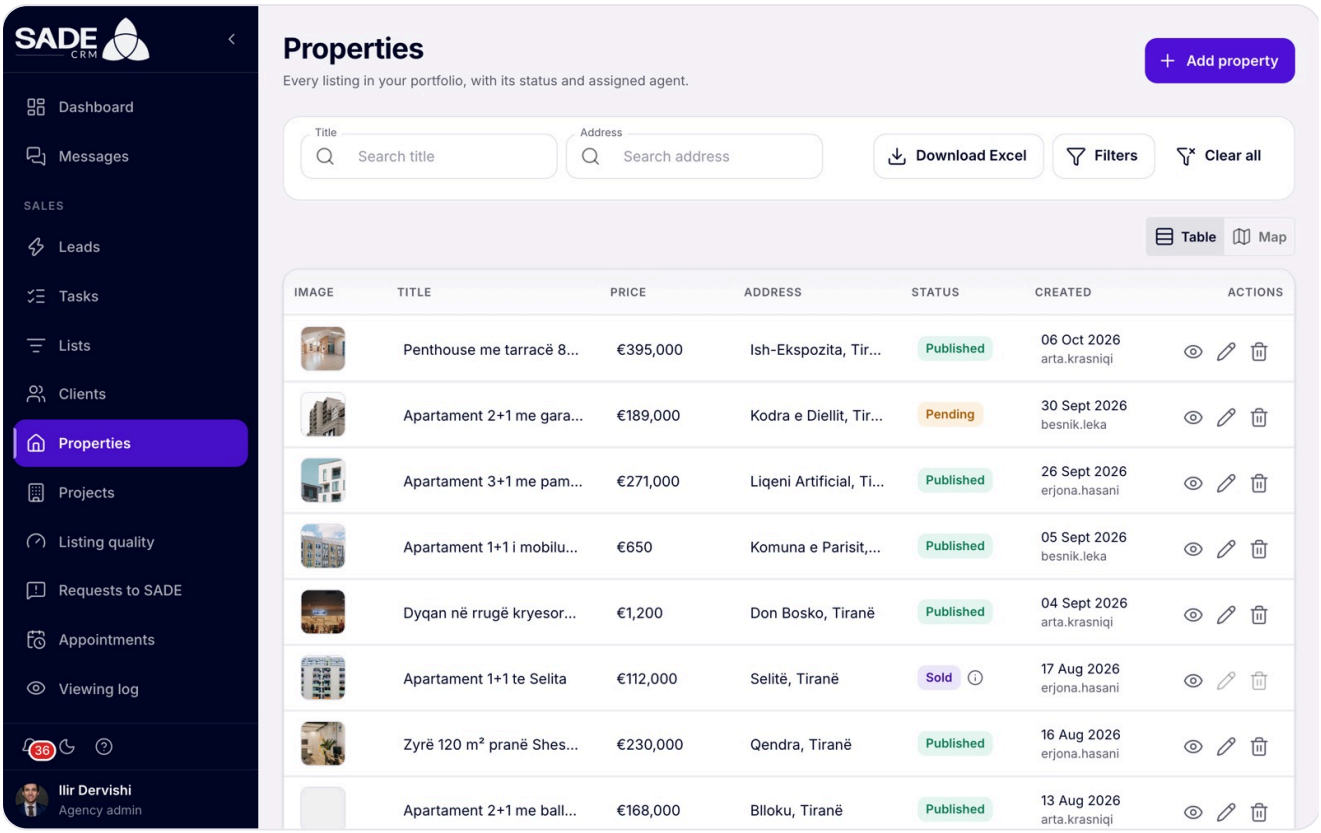
That evening, a buyer called Elton Muça clicks **Request a viewing** on the listing page and leaves his phone number. The request arrives in the CRM as a new lead tied to the listing. The agency's routing rules give leads on Besnik's listings to Besnik, so he gets a notification and the lead waits for him in **Leads**. The listing's page now shows **Inquiries 1**, and the **Activity** tab lists Elton's request.

The same day, SADE rejects Erjona Hasani's "Vilë me pishinë në Linzë" with the reason "The photos are missing or unclear." Erjona gets the notification and the email, clicks **Fix the listing** on the listing's page, replaces three dark photos with sharp ones and clicks **Save changes**. The CRM says "Saved and sent back to SADE for review.", and the villa is **Pending** again.

Managing listings

The Properties list and its filters, the map, the Excel download, editing and assigning listings, sold and rented listings, deleting, listings blocked by SADE, property codes and Requests to SADE.

Properties, under **Sales** in the menu, is where your agency's listings live. Agency admins see every listing of the agency. Agents see the listings assigned to them. From here you find a listing, open it, edit it, hand it to another agent or delete it, and download the list to Excel.



The Properties list of Tirana Living Real Estate. The sold flat's edit and delete buttons are greyed out.

Who sees which listings

Role	What they see in Properties
Agency admin	Every listing of the agency.
Agent	Only the listings assigned to them. A listing an agent created but an admin gave to someone else leaves that agent's list.
Organization admin	An agency's listings, once they have opened that agency.

Finding a listing

The **Title** and **Address** boxes are always shown. Click **Filters** for the others, and **Clear all** to start again. The list updates by itself a moment after you stop typing.

Filter	What it does
Title	Listings whose title contains the text.
Address	Listings whose address contains the text.
Status	**Published**, **Pending**, **Rejected**, **Rented**, **Sold**, **Blocked** or **Withdrawn**.
Sale or rent	**For sale** or **For rent**.
Price (€)	From and to. It compares the amounts as entered, whatever their currency.
Bedrooms, **Bathrooms**	From and to.
Area (m²)	From and to.
Date created	A date range.

The table shows the photo, **Title**, **Price** ("/ m²" or "/ month" when the price is per m² or monthly), **Address**, **Status**, **Created** (with who created it) and **Actions**. Choose 5, 10, 20 or 50 rows a page at the bottom.

In **Actions**, the eye opens the listing, the pencil edits it and the bin deletes it. For **Sold** and **Rented** listings, the pencil and the bin are greyed out.

Table and map

Switch between **Table** and **Map** above the list. The map shows a pin for every listing that matches your filters. The choice is kept in the page's address, so a reload or a shared link opens the same view.

- Click a pin and then **Open property** to go to the listing.
- Move or zoom the map and click **Search this area** to list only what is in view; **Back to the whole map** undoes it.
- The map shows up to 2,000 listings, the newest first. With more, it says so: filter, or zoom in and search the area, to see the rest.
- Listings without a pin are only in the table, and the map tells you how many there are.

Download Excel

Download Excel downloads the listings that match your current filters as an Excel file. Agents get only their own listings. The file has one row per listing, with its id, title, price, status, agent, owner,

date created and address, and a total row at the end. It is in Albanian when your agency's CRM language is Albanian, and in English otherwise.

The listing's page

Click a listing to open its page. It shows the photos, price and address (with **Copy address** and **Open in Google Maps**), and the counts of **Inquiries**, **Viewings** and **Deals**, and how many days it has been **Listed**. The tabs are:

- **Overview**: the specification, the location on the map, the description and the amenities;
- **Media**: every photo and video;
- **Activity**: the listing's enquiries and appointments.

On the right are the Listing quality card, the property code card, the availability, the contact buttons for the agent, the owner, the company and the assigned agent.

Editing a listing

Agency admins can edit any of the agency's listings. Agents can edit the listings assigned to them.

1. Open the listing and click **Edit**, or click the pencil in the Properties list.
2. Move between the tabs **Basic info**, **Location & ownership**, **Property details**, **Type & amenities** and **Media**. They hold the same fields as when you added the listing.
3. A chip **Unsaved changes** appears once you change something.
4. Click **Save changes**. If a field is wrong, the page jumps to the first tab with a problem, and each tab shows how many it has.

The CRM says "Property updated successfully". If you click **Cancel** with unsaved changes, it asks whether to leave and discard them.

- On the **Media** tab you can add photos and videos (same limits as when adding) and remove any. A file that breaks a limit is not added, and the CRM names it with the reason. If SADE refuses a file while saving, the rest is saved and the CRM says "Saved without these files:" with each file and why.
- The **Property details** tab also shows the **Status**, greyed out: you can't change it. Its hint reads "SADE publishes the listing once it's approved. Sold and Rented come from closing a deal."
- A **Rejected** listing shows SADE's reason at the top of the edit page, and the hint reads "Saving sends the listing back to SADE for review." Saving it makes it **Pending** again: "Saved and sent back to SADE for review." See Fixing a rejected listing.
- Only an agency admin can change the owner and the assigned agent.
- Saving a change confirms the listing for another marketplace period. If the listing is published, the change shows on the marketplace shortly after you save.

Assigning a listing to an agent

The assigned agent handles the listing's viewings and enquiries, and gets its reminders and notifications. Only an agency admin can change it.

1. Open the listing and click **Edit**.
2. On **Location & ownership**, under **People**, pick the new person in **Assigned agent**.
3. Click **Save changes**.

The new agent gets a notification and an email. The listing moves from the old agent's Properties list to the new agent's.

Sold and rented listings

A listing becomes **Sold** or **Rented** through a deal. When a deal on the listing is set to **Completed**, the listing becomes **Sold** if it is for sale, or **Rented** if it is for rent. See Deals.

- The listing leaves the marketplace. Its page there says it is no longer available.
- In the Properties list its edit and delete buttons are greyed out.
- It no longer holds the property code, so the home can be listed again later.
- If the deal is moved off **Completed** or deleted, and no other completed deal holds the listing, it goes back to **Published**. Only an admin can change a completed deal.

Taking a listing off the marketplace

There is no archive or withdraw button. Depending on why the listing should go:

Situation	What to do
Sold or rented through your agency	Complete the deal.
Sold by someone else, or the owner withdrew it	Delete the listing, or simply stop confirming it: it comes off the marketplace at the end of its period (see expiry).
It came from a spreadsheet or feed	Mark it as withdrawn in your file or source: it becomes **Withdrawn**. Or delete it: the import won't bring it back. See Imports and feeds.

Deleting a listing

1. In **Properties**, click the bin on the listing's row.
2. The CRM asks "Confirm deletion?" and warns that this cannot be undone. Confirm.

The CRM says “Property deleted successfully!” Deleting is permanent: the listing, its photos and its videos are erased. It also frees a place under your plan’s listing limit.

Agency admins can delete any of the agency’s listings, agents only the ones assigned to them. Sold and rented listings can’t be deleted from the list.

A listing that came from a spreadsheet or a feed stays deleted: later uploads of the file, and later reads of the feed, leave it out even if they still have it. To list the home again, add it by hand.

Blocked by SADE

SADE’s moderators can block a listing: for example a duplicate, or a home a client has reserved. They give a reason. A blocked listing has the status **Blocked** and is not on the marketplace. The assigned agent gets a notification: “Property has been blocked”.

When a moderator unblocks it, its status returns to **Published**.

Property codes

In countries with an official property number (in Albania, the cadastral zone and property number), each listing carries that number as its **property code**. It is private: only your agency and SADE see it. It shows in the property code card on the listing’s page.

The code makes sure that a home is listed by only one agency at a time:

- A code is held by a listing while it is **Pending** or **Published** and not blocked.
- When a listing is sold, rented, rejected, blocked, withdrawn or deleted, it lets go of the code.
- Your agency can list the same home twice, once for sale and once for rent.
- Older listings without a code show “Not added yet. Add it the next time you edit the listing.”

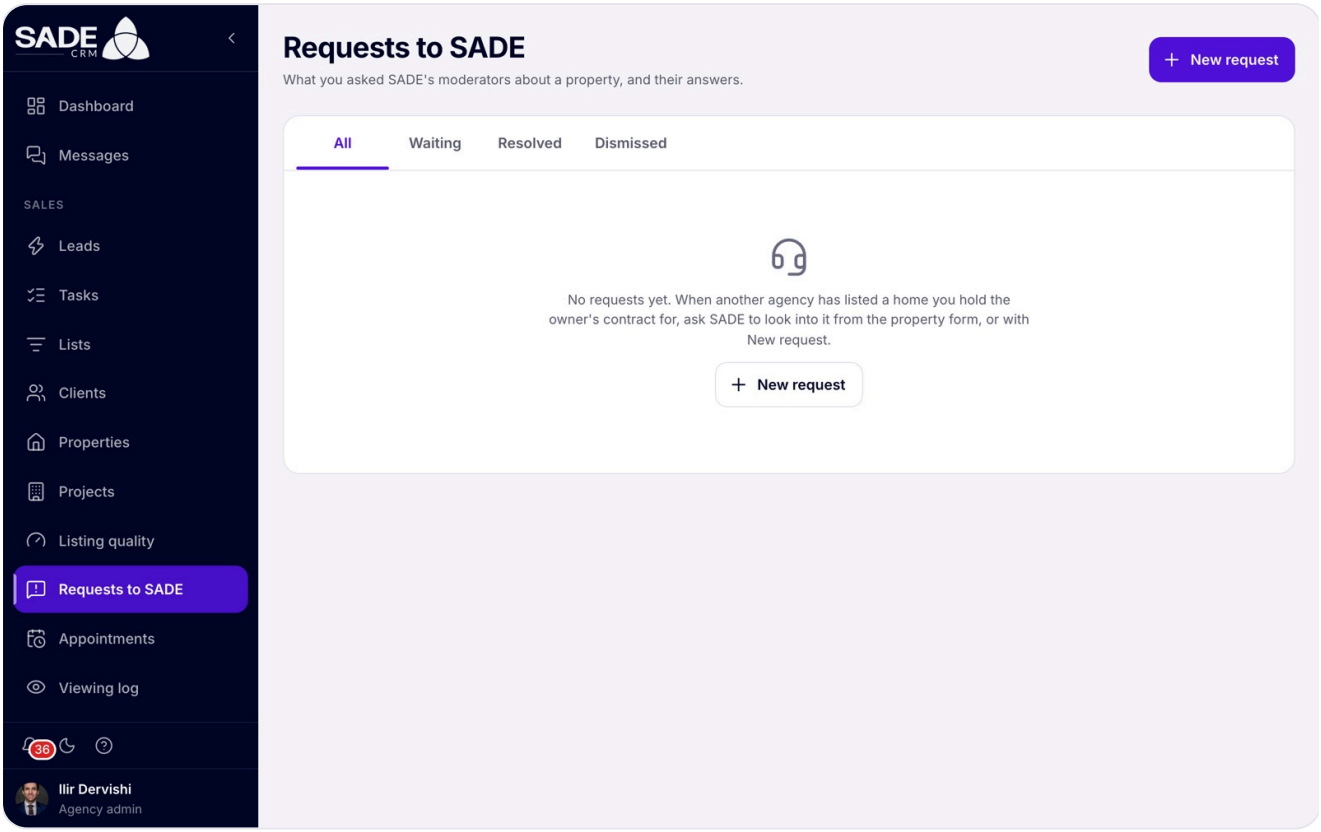
If you try to add a home whose code another agency holds, the CRM refuses to save it. If the owner signed an exclusive contract with you, click **Ask SADE to look into it**. The dialog asks for:

Field	What to enter
Message to SADE	Required, at least 10 characters. For example when the owner signed and why the other listing is wrong.
The owner’s contract	Optional. A photo or PDF, up to 10 MB. Only SADE’s moderators see it.

Click **Send to SADE**. The CRM says “SADE’s moderators will look into it. You’ll get their answer in the CRM and by email.”

Requests to SADE

Requests to SADE, under **Sales** in the menu, lists what your agency asked SADE's moderators about a property, and their answers.



Requests to SADE before the agency has asked anything.

There are three ways to ask:

- **Ask SADE to look into it**, when a property code is refused while you add or edit a listing (see above);
- **Report a problem to SADE**, in the property code card on a listing's page, for anything wrong with that listing, such as a wrong owner;
- **New request** on the Requests to SADE page, for example when another agency has listed a home you hold the owner's contract for. Say which home it is about, write a **Message to SADE**, and attach the contract if you have it.

How you name the home in a new request depends on your country:

Your country	What the dialog asks for
Has property codes (Albania, and the countries where the code is optional)	The **Property code**, for example 8150/7/419+1-6.
Has no property codes	**One of your listings**: type at least 2 letters of its title and pick it. Or **A link from the SADE marketplace**: paste the **Link to the listing**, copied from its page on sadegre.com. If the link doesn't lead to a listing, the CRM says "That listing wasn't found on SADE."

Each request shows its status, the property code or listing, who asked and when, the message, and whether a contract is attached. The tabs filter them:

Status	Tab	What it means
Waiting for SADE	**Waiting**	Sent; SADE has not answered yet.
Resolved	**Resolved**	SADE agreed and acted, for example by taking the other listings off the marketplace.
Dismissed	**Dismissed**	SADE found nothing to change.

SADE's answer appears under the request, with its date, and you are told by notification and by email.

If SADE takes one of **your** listings off the marketplace after another agency's request, your agency admins and the listing's agent get a notification and an email: "SADE took "title" off the marketplace", with SADE's reasons.

EXAMPLE

Erjona Hasani goes on two weeks' leave, so Ilir Dervishi hands her office listing to Besnik Leka. He opens **Properties**, types "Zyrë" in **Title**, and opens "Zyrë 120 m² pranë Sheshit Skënderbej". He clicks **Edit**, and on **Location & ownership** sets **Assigned agent** to Besnik. He clicks **Save changes**. Besnik gets a notification and an email, and the office now appears in his Properties list. Unless a lead routing rule says otherwise, new enquiries about it now go to Besnik.

The same week, the flat "Apartament 1+1 te Selita" sells. Erjona's deal for it is set to **Completed** before she leaves, so the listing becomes **Sold**, leaves the marketplace, and its edit and delete buttons in the list turn grey.

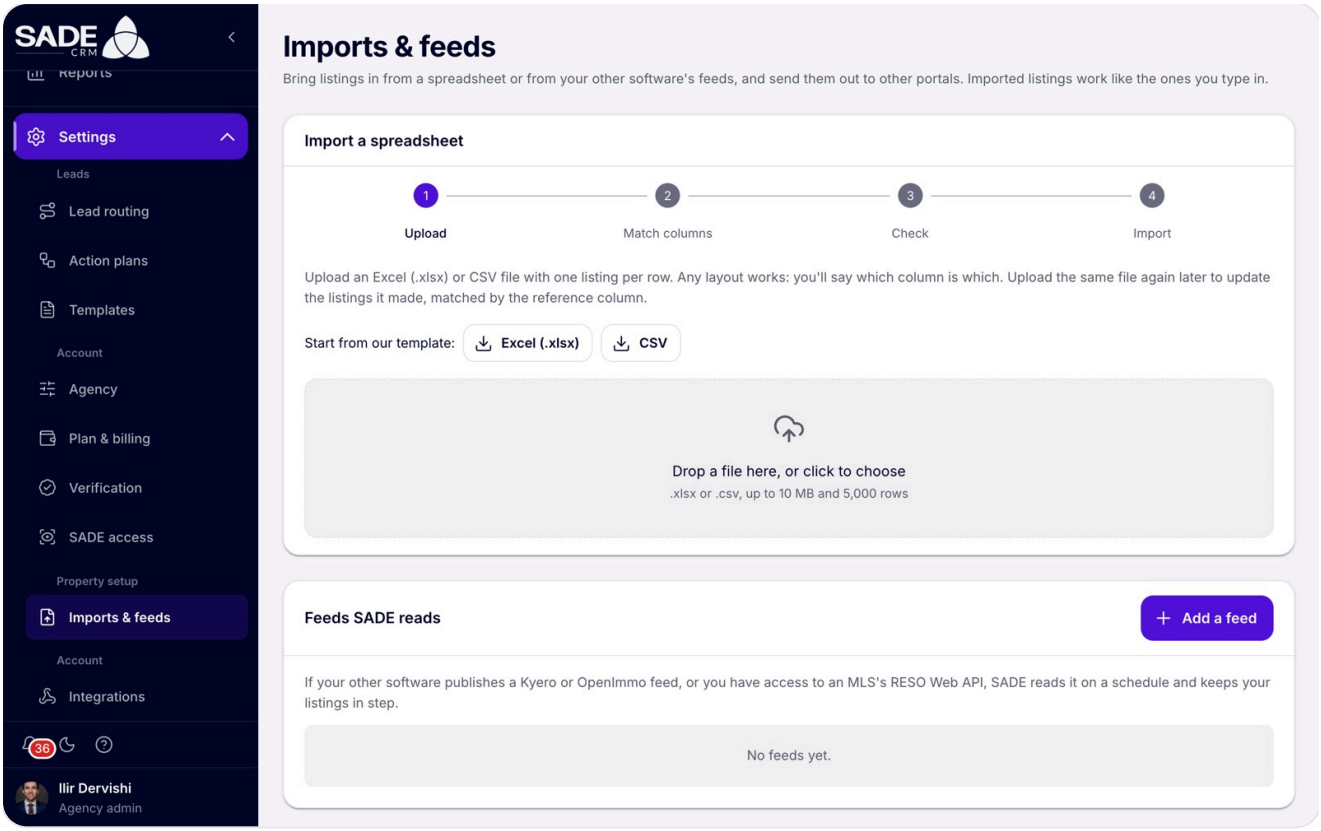
At the end of the month Ilir clicks **Download Excel** with no filters and takes the list of every listing, with its status and agent, to the monthly office meeting.

Imports and feeds

Bring listings in from an Excel or CSV file or from a Kyero, OpenImmo or RESO feed, keep them up to date, and send your listings out to other portals.

If your listings already live somewhere else, such as another CRM, your website or a spreadsheet, you don't have to type them in again. **Imports & feeds** brings them into SADE CRM from a spreadsheet, or reads your other software's feed on a schedule and keeps your listings in step with it. It also gives you feed addresses that other portals can read your listings from.

The page is for agency admins. Open **Settings** at the bottom of the menu; it is under **Property setup**. Imported listings work like the ones you type in: they appear in **Properties**, get enquiries, viewings and deals, and count towards your plan's listing limit.



The page has four cards: Import a spreadsheet, Feeds SADE reads, Import history, and Your feeds for other portals.

What happens to imported listings

- **New listings of a verified agency are published straight away.** They do not wait in SADE's review queue, and they appear on the marketplace at once. SADE's moderators look at them afterwards, and can block one.
- **New listings of an agency that isn't verified yet are Pending.** They wait for SADE's review before they are published, like listings you add by hand.
- Their availability is set to immediate, the price type to total, and the exact location is hidden: the marketplace shows a shaded area.
- They are assigned to the agent named in the row or feed, or to the default agent you choose.
- Photos are downloaded in the background and appear on the listings over the next minutes.
- Every published listing that is still in the file or feed is confirmed again, so it stays on the marketplace for another period (60 days for sale, 30 for rent). An expired one comes back.
- Where your country requires a property code and a listing has none, it gets the **No property code** flag. See Flags.

Each new listing counts towards your plan's listing limit. Once the limit is reached, the remaining new rows fail with "The plan's listing limit is reached; upgrade the plan to import more." Updates to listings you already have still go through.

There is no notification or email after an import. You see the result on screen and in **Import history**.

Import a spreadsheet

The spreadsheet import takes an Excel (.xlsx) or CSV file with one listing per row. Any layout works: you tell SADE which column is which.

Upload

1. If you are starting a new file, click **Excel (.xlsx)** or **CSV** next to “Start from our template:”. The template has the column headers (in Albanian for an Albanian-language agency, otherwise in English), the required ones shaded yellow, and one example row.
2. Drop your file on the box, or click it to choose one. Files can be up to 10 MB and 5,000 rows. Old .xls files can’t be read: save them as .xlsx or .csv first.

Match columns

SADE shows the first rows of your file as it read them, and under each column which field it will fill, or “not used”.

Below, **Which column is which** has one drop-down per field. SADE guesses from your headers, in English, Albanian and many other words (“ref”, “asking price”, “town”, “sqm”, “beds”). If every column you used last time is in the new file, it suggests last time’s choices. Each column can be used once. Pick **Not in the file** for anything your file doesn’t have.

Click **Check the rows**. It stays greyed out until every required field has a column.

The fields

Fields marked * are required.

Field	What it takes
Reference	Your own id for the listing, up to 200 characters. Without it, every upload creates new listings instead of updating them.
Title	Optional. If it is empty, SADE writes one, such as “2-bedroom apartment for sale in Tirana”.
Description	Up to 20,000 characters. Formatting is removed.
Price *	More than zero. Written as people type it: 120000, 120.000, 120,000 or € 120.000.
Currency	A code such as EUR or ALL, or a sign or word such as €, $, lek or euro. If there is no column, SADE uses a sign in the price cell, or your agency’s currency.
Sale/Rent *	Words such as sale, for sale, shitje, or rent, to let, me qira.
Property type *	Matched to SADE’s types by name in many languages: apartment or flat, villa or house, studio, office, shop, land or plot. A cell that contains one of them, like “Apartament 2+1”, also matches.
City *	A city of your agency’s country. Accents and capitals don’t matter, and only the part before a comma counts (“Tiranë, Shqipëri” works).
Neighbourhood	Up to 120 characters.
Address	Up to 300 characters. If empty, the neighbourhood or the city is used.
Postcode	Up to 20 characters.
Latitude, **Longitude**	Decimal numbers, with a point or a comma.
Bedrooms, **Bathrooms**	0 to 50.
Area (m²)	1 to 1,000,000. “85 m²” works.
Year built	From 1800 to ten years from now.
Agent email	The email of one of your agents or admins. If it doesn’t match anyone, the row is not an error: the listing goes to the default agent.
Photos	Web addresses (http or https), separated by spaces, line breaks, “;” or “|”. Up to 40, cover photo first.

Field	What it takes
Amenities	Names separated by commas, ";", "|" or line breaks. SADE recognises common ones such as parking, elevator, balcony, heating, air conditioning, furnished, sea view, garden, security and storage. Others are left out without an error.
Status	Empty means active. Active words (active, available, published), sold words (sold, rented, let) or withdrawn words (withdrawn, inactive, archived, off market).

You can also match columns for the property code (for example 8150/7/419+1-6 in Albania), an area in square feet, and the energy class used in your country.

Check

Nothing is saved yet. SADE shows four figures: **Rows**, **New listings**, **Updates** and **Rows with problems**. Rows with problems are listed with their row number as you see it in Excel, the reference and the problem, for example `City "Tirna" isn't one SADE knows in Albania.` Problems are written in Albanian when your agency's CRM language is Albanian, and in English otherwise; problems with a property code are always in English. These rows will be skipped and the rest imported.

Under the figures, SADE may add:

- "3 rows are listings deleted in the CRM; they won't be brought back." See Deleted listings stay deleted.
- "Your agency isn't verified yet, so new listings wait for SADE's review before they are published, like listings you add by hand."

Two choices before you import:

- **Rows without an agent go to**: **The agency's first admin** (the default), or one of your agents. A row with an agent email goes to that agent.
- **Withdraw listings missing from this file**: tick it when the file is your full list. Listings from earlier spreadsheets whose reference isn't in this file are set to **Withdrawn**, which takes them off the marketplace. It needs a Reference column. A row that has a problem still counts as present, so a typo doesn't take a listing down. Only listings that are **Published**, or **Pending** from an earlier import, are withdrawn; sold, rented, blocked and rejected listings stay as they are.

Click **Import 12 listings** (the number is new listings plus updates) and keep the page open. It takes about a second for every 300 rows.

> **Note:** the check does not test your plan's listing limit, or whether another agency holds a property code. Those rows can still fail at import, so the import can report more problems than the check.

Import

The result shows **New**, **Updated**, **Unchanged**, **Withdrawn** and **Problems**, and the problem rows. A note says that photos are fetched in the background, and whether the new listings are published or wait for SADE's review. Click **Import another file** to start again.

Updating listings by uploading again

Upload the same file again later, with your changes, and SADE updates the listings it made, matched by **Reference**:

- Only the fields that have a value in the row change. An empty cell keeps what the listing has.
- A listing whose row is the same as before is not touched and counts as **Unchanged**.
- The assigned agent changes only when the row names another of your agents.
- An empty **Photos** cell keeps the photos. Photos your agents added by hand in the CRM stay, after the imported ones.

The uploaded file is kept for 30 minutes between steps. After that, upload it again.

Statuses on a new upload

The file's **Status** column changes a listing's status only while the listing is as the file or SADE's approval left it: **Published**, or the status the last upload gave it.

- A sold word makes it **Sold** or **Rented**, and a withdrawn word makes it **Withdrawn**.
- An empty status or an active word keeps a **Published** or **Pending** listing as it is. A listing the file had withdrawn comes back, as a new listing would: published if your agency is verified, otherwise **Pending** for SADE's review.
- A status decided in the CRM or by SADE stays, whatever the file says: a listing sold or rented through a deal, or **Blocked** or **Rejected** by SADE. Its other fields are still updated from the row.

Deleted listings stay deleted

A listing you delete in the CRM is never brought back by an import. Later uploads leave its row out, even if the file still has it, and count it under **Unchanged**. The import's details name it, for example "1 listing was deleted in the CRM, so it wasn't brought back (reference TL-007)."

To list the home again, add it by hand in **Properties**.

Feeds SADE reads

If your other software publishes a Kyero or OpenImmo feed, or you have access to an MLS's RESO Web API, SADE reads it on a schedule and keeps your listings in step.

Adding a feed

1. Under **Feeds SADE reads**, click **Add a feed**.
2. Fill in the dialog:

Field	What to enter
Kind	**Kyero feed** (Kyero v3 XML, read in full each time), **OpenImmo feed** (OpenImmo 1.2) or **RESO Web API**. It can't be changed later.
Name	Required, up to 100 characters. For example "Our website".
Feed address	For Kyero and OpenImmo: the full address of the XML file, starting with https://.
Server address	For RESO: the server's base address, usually ending in /odata.
RESO credentials	For RESO: **Token address**, **Client id**, **Client secret**, and optionally **Scope** and **Resource**. You get them from the MLS. They are stored encrypted and never shown again.
Read every	From 15 minutes to a week. One hour to start with.
Listings without an agent go to	**The agency's first admin**, or an agent. A listing whose agent email matches one of yours goes to that agent.
Withdraw listings the feed no longer has	On to start with. After a full read, listings missing from the feed are set to **Withdrawn**, if they are **Published** or still **Pending** from the feed.
Read on schedule	On to start with. Off: the feed is kept, but read only when you press **Read now**.

3. Click **Add feed**. SADE reads it within 15 minutes, or at once if you click **Read now**.

Each feed's row

The row shows the feed's name and kind, how the last read went (**Last read worked**, **Last read failed**, **Reading…** or **Not read yet**), how often it is read, when it was last read and how many published listings it has. If the last read failed, the reason shows in red, for example "The feed answered 404 Not Found."

- **Read now** reads it at once, even when it is paused. For RESO, choose **What changed** (listings changed since the last read) or **Everything** (all listings, and withdraw what the server no longer has).
- The switch pauses the feed or turns it back on.
- The pencil edits it; the bin deletes it.
- **History** shows that feed's reads.

When you delete a feed, SADE stops reading it and its history is deleted. Its listings stay in the CRM as ordinary listings, unless you tick **Also withdraw its listings**: then those that are **Published**, or still **Pending** from the feed, become **Withdrawn**.

> **Note:** nobody is notified when a scheduled read fails. Look at the feeds' rows now and then.

What a feed does to your listings

Feeds follow the same rules as spreadsheets: new listings are published if your agency is verified and wait for SADE's review if not, updates change only what the feed gives, statuses decided in the CRM or by SADE stay, deleted listings are not brought back, and photos are fetched in the background. A listing the feed withdrew comes back when the feed lists it again. Listings missing from the feed are withdrawn only after a full, successful read, and only when **Withdraw listings the feed no longer has** is on. Nothing is withdrawn when:

- the read failed;
- the read was partial: an OpenImmo feed that sends only changes, or a regular RESO read;
- the feed had no listings with an id;
- the listing's entry had a problem.

Feeds can be up to 200 MB, and must be on the public internet.

Import history

Import history lists every import, spreadsheets and feeds, newest first. Click **Refresh** to update it.

Column	What it shows
When	When it ran. Hover for the exact time.
From	The file name or the feed name, and its kind.
Status	**Running**, **Finished** or **Failed**.
New	Listings created.
Updated	Listings changed.
Unchanged	Listings that were the same, and listings left out because they were deleted in the CRM.
Withdrawn	Listings taken off because the source no longer had them.
Problems	Rows not imported, in red.
Started by	The person, or **Schedule**.

Click a row to see its figures and the list of problems.

Your feeds for other portals

Many property portals can read a Kyero or OpenImmo feed. SADE can publish one for you, so a portal shows your listings and keeps them up to date.

1. Under **Your feeds for other portals**, click **Turn on**.
2. Two addresses appear: **Kyero (v3)** and **OpenImmo (1.2.7)**. Click **Copy** next to the one the portal reads.
3. Paste it into the portal's feed or import settings.

The feeds hold your listings that are **Published** and not blocked or expired, with only public information: the shaded location unless you show the exact one, and SADE's copies of the photos with the cover first. Videos and the property code are left out. A portal sees changes within 5 minutes.

> **Important:** the address holds a secret. Anyone who has it can read your published listings. If it gets out, click **New address**: the old addresses stop working at once, and you give the new ones to every portal. **Turn off** stops both feeds at once.

EXAMPLE

Tirana Living Real Estate kept its listings in a spreadsheet before moving to SADE CRM. Ilir Dervishi saves it as CSV with the columns Reference, Title, Description, Price, Currency, Sale/Rent, Property type, City, Neighbourhood, Address, Bedrooms, Bathrooms, Area (m²), Year built, Agent email, Photos and Status. There are 12 rows, TL-001 to TL-012.

He opens **Settings → Imports & feeds**, drops the file on the box, and SADE matches every column from its header. He clicks **Check the rows**: **Rows** 12, **New listings** 11, **Rows with problems** 1. Row 6, TL-005, says `Price: "me marrëveshje" is not a number.` He leaves **Rows without an agent go to** on himself and clicks **Import 11 listings**.

The result shows **New** 11 and **Problems** 1. The eleven listings are published, each with the agent from the Agent email column, and since the agency is verified they are on sadegre.com once their photos have arrived.

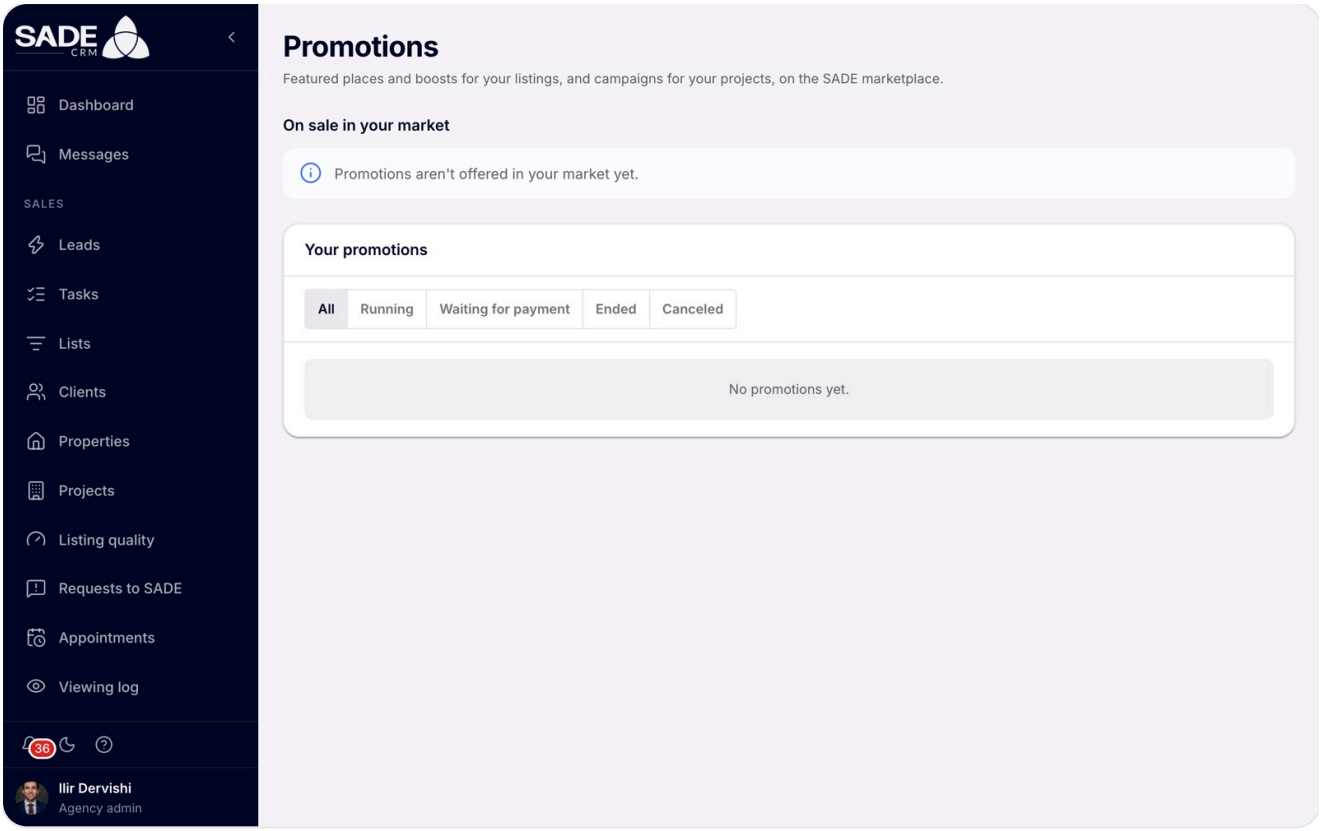
Ilir asks the owner of TL-005 for a price, types 98000 in the file and uploads it again. SADE suggests the same columns as last time. This time TL-005 is created, and the other eleven are matched by their reference instead of being created twice.

Promotions

Where SADE offers promotions in your market, what Featured, Boost and Project campaign do on the marketplace, who can buy them, and how to pay with PayPal.

A promotion is something your agency pays for to make one listing or one project more visible on the SADE marketplace, for a set number of days. SADE decides country by country whether promotions are on sale, which ones, for how many days and at what price.

Promotions, under **Team** in the menu, is where you see what is on sale in your market, buy it, and follow what you bought. Agency admins and agents can open the page. Only agency admins can buy and pay.



The Promotions page in a market where SADE does not sell promotions yet.

Is it offered in your market?

Promotions are not on sale in every market. The **On sale in your market** section at the top of the page tells you where you stand:

What the page says	What it means
Cards for each product, with the price and the number of days	Promotions are on sale in your market.
“Promotions aren’t offered in your market yet.”	SADE does not sell promotions in your country yet. There is nothing to buy.
“Your agency must be verified by SADE before it can promote…”	Your agency is not verified yet. An agency admin can click **Get verified** to go to Verification.
“Online payment isn’t set up yet — contact SADE.”	Payment is not ready yet; ask SADE.

Prices and durations are set by SADE for each country and shown on the product cards. They are not listed in this guide.

The three kinds of promotion

Kind	Bought for	What it does on the marketplace
Featured	A listing	Shown in the featured places above search results, with a label, and ranks higher.
Boost	A listing	Ranks higher in search results. No label.
Project campaign	A project	Shown first on New developments and on the home page, with a label.

More about each:

- **Featured.** The listing's card carries a **Featured** label. Above the search results, a box called "Featured homes" shows up to two featured listings that match the search, chosen at random each time, so featured listings share the places. The box tells visitors that agencies pay to show these homes there, and that the results below are in their usual order.
- **Boost.** The listing moves up in the marketplace's default order. Nothing on the card shows it.
- **Project campaign.** The project card carries a **Featured** label and comes first on the New developments page. Projects come with the Pro plan or an Enterprise organization; see Projects.

A listing can be Featured and Boosted at the same time. Promotions only affect the marketplace's default order; when a visitor sorts by price or size, promotions make no difference.

Buying a promotion

Only an agency admin can buy. There are three ways in:

- On **Promotions**, click **Promote a listing or project**.
- On a published listing's page, click **Promote** (next to **Edit**).
- In a published project, click **Promote**.

The **Promote** buttons only appear where your market sells promotions.

1. The dialog **Promote on the marketplace** opens. If you started from the Promotions page, choose **A listing** or **A project**, then pick it. Only listings that are on the marketplace now, and published projects, can be chosen.
2. Under **What to buy**, click a product. Each card shows its name, its kind, the price and the number of days.
3. Read the note: the promotion starts as soon as the payment arrives and runs its number of days. If the listing is already promoted the same way, the new days start when the current ones end.

4. Pay with PayPal (see below).

What can be promoted

- **A listing** must be on the marketplace now: published, confirmed (not expired) and not blocked. If it has expired, the dialog asks you to confirm it's still available first.
- **A project** must be published on the marketplace.
- **Boost** is greyed out for a listing when another agency lists the same home and search shows their listing, because a boost would not be seen. Featuring it still works.
- You can buy up to a year ahead. Two promotions of the same kind on the same listing never overlap: the second waits for the first to end. Different kinds run side by side.

Paying with PayPal

Each promotion is a one-off payment, not a subscription.

1. PayPal's own buttons appear in the dialog. Depending on your country and device, PayPal may also offer to pay by card without a PayPal account.
2. Approve the payment in PayPal's window.
3. The dialog says "Payment received — your promotion starts in a moment." and then, once the payment is confirmed, either "Your promotion is running, until …" or, if the same kind is already running, "Paid. Your promotion starts on …, when the current one ends, and runs until …".

If PayPal's buttons don't load, the dialog shows a **Pay** button that takes you to PayPal's page instead.

If PayPal has not confirmed the payment within a minute, the dialog says so: it can take a few minutes, and the promotion starts when the payment arrives. If you were charged and it doesn't start, contact SADE.

If you cancel on PayPal's page, nothing is charged. The promotion stays in your list as **Waiting for payment** with a **Pay** button, so you can pay later. If it is still unpaid 48 hours after you bought it, it is canceled.

Every promotion payment also appears in **Plan & billing**, under payments, with the kind "Promotion". See Plans and billing.

Your promotions

The **Your promotions** table lists everything your agency bought, newest first. Filter it with **All**, **Running**, **Waiting for payment**, **Ended** and **Canceled**.

Column	What it shows
Listing or project	Its photo and name, linked to it. “Deleted” if it no longer exists.
Product	The product and its kind.
Period	The start and end dates. While unpaid, how many days it will run from payment.
Status	See below.
Payment	The amount and the date it was paid, or a **Pay** button while it waits for payment.

Status	What it means
Waiting for payment	Bought, not paid yet.
Paid, starts later	Paid, and waiting for a promotion of the same kind on the same listing or project to end.
Running	On the marketplace now.
Ended	Its days are over.
Canceled	Not paid within 48 hours, or the payment was refused or refunded.

On a listing’s page, a running promotion shows next to **Promote**, for example “Featured until 20/11/2026” or “Boosted until …”. In a project it reads “Campaign until …”.

Rules to know

- A paid promotion can’t be stopped from the CRM.
- The days run from start to end whatever happens to the listing. If it leaves the marketplace in the meantime (sold, expired or blocked), the promotion shows nothing while it is off, and the days are not paused.
- Buying a promotion does not confirm the listing. Keep confirming it as usual.
- You don’t get a notification when a promotion starts or ends; check **Your promotions**.
- Promotions are not in the phone app.

EXAMPLE

In a market where SADE sells promotions, Ilir Dervishi wants more buyers to see Erjona's "Apartament 3+1 me pamje nga Liqeni". It is published, confirmed last week and not blocked, so it is on the marketplace.

He opens the listing and clicks **Promote**. Under **What to buy** he picks a 30-day **Featured** product, reads the price on the card, and pays with PayPal. The dialog says his promotion is running, and the listing's page now shows "Featured until" with the date 30 days on.

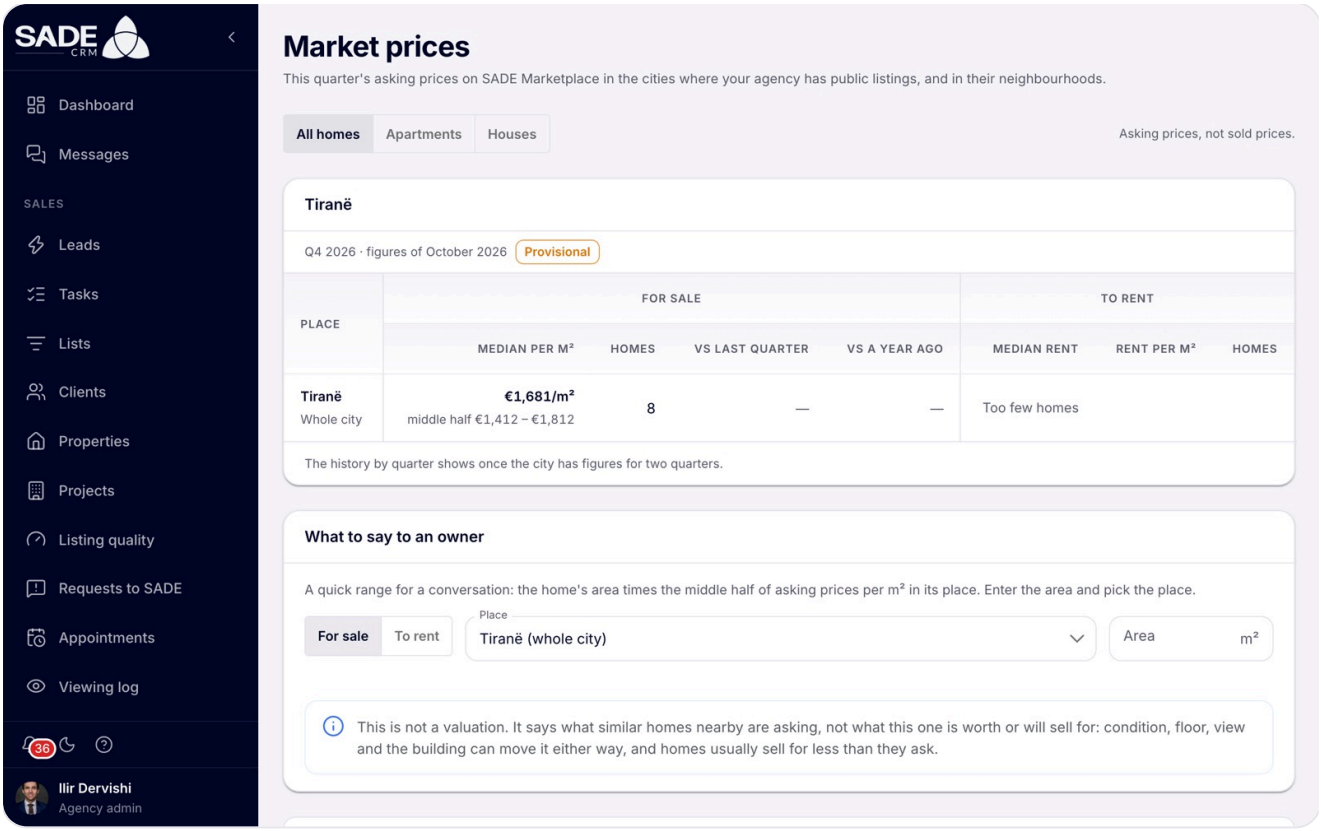
On sadegre.com, the flat's card now has the **Featured** label, and it can appear in the "Featured homes" box above searches for flats in Tiranë. Two weeks later Ilir buys a second 30-day **Featured** product for the same flat. The table shows it as **Paid, starts later**, with a period that begins the day the first one ends.

Market prices

This quarter's median asking prices on the SADE marketplace for the places where your agency lists, a quick range to open a conversation with an owner, and the seller leads that come from "What's my home worth?".

Market prices, under **Team** in the menu, shows what homes are asking on the SADE marketplace in the cities where your agency has public listings, and in their neighbourhoods: the median price per m² for sale, the median rent, and how they have moved. Below the figures, **What to say to an owner** turns them into a rough range you can give an owner on the phone.

Agency admins and agents see the same page. The figures are **asking prices**, not the prices homes sold for.



Tiranë in the fourth quarter of 2026, with figures for sale but too few homes to rent yet.

Reading the figures

1. Choose the kind of home at the top: **All homes** (the default), **Apartments** or **Houses**.
2. Each city where your agency has a listing on the marketplace now has its own card. Under the city’s name you see the quarter and the month the figures come from, for example “Q4 2026 · figures of October 2026”.
3. The first row of the table is the **Whole city**. Below it come the city’s neighbourhoods where your agency has a public listing and there are enough homes for a figure.

Column	What it shows
Place	The city or the neighbourhood.
For sale: Median per m²	The median asking price per m², with the middle half under it.
For sale: Homes	How many homes the figure is based on.
Vs last quarter	The change of the median price per m² from the quarter before. Green when up, red when down.
Vs a year ago	The change from the same quarter a year before.
To rent: Median rent	The median monthly rent.
To rent: Rent per m²	The median monthly rent per m².
To rent: Homes	How many homes the rent figures are based on.

Where there are not enough homes, the cell says “Too few homes”. The changes are only shown when both quarters have enough homes.

Under the table, a chart shows the **Median asking price per m², by quarter** for up to three years. Switch it between **For sale** and **To rent**. It appears once the city has figures for two quarters.

The labels on a card

- **Provisional**: the current quarter. It changes until the quarter ends.
- **Rebuilt later**: a past quarter SADE worked out again afterwards from the listings still on record. It may undercount homes that left the market early.

How the figures are made

- **Median** is the middle price: half the homes ask less per m², half ask more.
- **Middle half** is the range between the cheapest quarter and the dearest quarter of the homes, per m². A quarter of the homes asked less, a quarter asked more.
- **Minimum count.** Each figure needs at least 8 homes. Places with fewer are left out, but their homes still count in the city’s figure.
- **What counts.** Homes listed on the SADE marketplace by verified agencies, and by owners whose listing SADE approved. A home listed by several agencies counts once. Listings priced per m², blocked listings, and anything that is not a home (shops, offices, land, garages, warehouses, hotels) are left out, and so are prices too low or too high to be real.

- **Which month.** A home counts in a month if it was on the market at some point that month. A quarter shows the figures of its last month.
- **Neighbourhoods** are the names agents type on their listings, grouped by spelling, so "Ish-Blloku" and "Ish Blloku" are one place.
- **Currency.** Everything is shown in euros. Prices in other currencies are converted at today's rate.
- **When.** The figures are rebuilt every night.

The box **How these figures are made**, at the bottom of the page, says the same in short.

Why the page might be empty

The page only shows cities where your agency has at least one listing on the marketplace now. If your agency is not verified yet, or none of its listings is public, the page says "No figures yet". It fills in as your listings go public and as enough homes are listed in each place. See Review and publishing.

What to say to an owner

When an owner asks what their home might fetch, this card gives you a rough range to start the conversation. It multiplies the home's area by the middle half of asking prices per m² in its place.

1. Choose **For sale** or **To rent**.
2. Pick the **Place**: a whole city ("Tiranë (whole city)") or one of its neighbourhoods. Only places with figures are listed.
3. Type the **Area** in m². It must be more than 10 m².

The card shows the **Rough asking-price range** (for rent, the **Rough asking-rent range, a month**), and a line explaining it: the middle of the range, the area, the prices per m² used, and how many homes they come from. The kind of home chosen at the top of the page (**All homes**, **Apartments** or **Houses**) applies.

Sale figures are rounded to €1,000 (to €100 under €20,000), rents to €10. Nothing is saved or sent to anyone.

> **Important:** this is not a valuation. It says what similar homes nearby are asking, not what this one is worth or will sell for. Condition, floor, view and the building can move it either way, and homes usually sell for less than they ask. Use it to open the conversation, then offer to visit.

Seller leads from "What's my home worth?"

On sadegre.com, owners can check what their home might be worth for free, on the page "What's my home worth?". After they see their range, they can ask up to three agencies to contact them for

a real valuation. Each agency they choose gets a new **lead** in SADE CRM.

Which agencies are offered

The marketplace offers the owner up to six agencies. Your agency can be one of them when:

- it is verified;
- it has public listings in the home's city;
- the switch **Receive seller leads from the marketplace** is on (it is on to start with).

Agencies with the most public listings in the home's neighbourhood come first, then those with the most in the city. Nobody can pay for a place in this list, and promotions do not change it. Next to each agency the owner sees how many homes it lists nearby and, once the agency has had at least 10 leads in the last 30 days, the share of new requests it answered on time.

How the lead arrives

- It arrives in **Leads** like any other new lead, from "SADE Marketplace", and your lead routing decides who gets it. The person it goes to is notified.
- The lead card has a **Seller** chip, with the middle of the owner's range when there is one, for example "Seller · about €143,000". Its line reads "Wants to sell · SADE Marketplace".
- On the client's timeline, the enquiry carries a card **Asked what their home is worth**: the type, the area, the bedrooms, the neighbourhood and city, whether it is for sale or to rent, the range the owner saw and how confident the estimate was (**High confidence**, **Medium confidence** or **Low confidence**).
- The owner's consent to be contacted is saved with the person.

The card shows what the owner already has in mind before you call. The range is the one the owner saw, made from asking prices of similar homes; it is not a valuation either.

Turning the switch off

An agency admin can stop receiving seller leads: open **Settings → Lead routing**, and in the **Speed to lead** card turn off **Receive seller leads from the marketplace**, then save. Your agency is then no longer offered to owners. See Lead routing.

> **Note:** Market prices and the owner card are not in the phone app. Seller leads do arrive in the app's leads, without the valuation card.

EXAMPLE

Agim Gjoka phones Tirana Living Real Estate. He owns an 85 m² flat in Tiranë and wants to know roughly what he could ask before he decides to sell.

Arta Krasniqi opens **Market prices**. The Tiranë card shows a median of €1,681/m² for sale, with a middle half of €1,412 to €1,812, from 8 homes. Neighbourhood figures are not there yet, so in **What to say to an owner** she chooses **For sale**, picks **Tiranë (whole city)** and types 85.

The card shows a **Rough asking-price range** of €120,000 – €154,000, with the middle of the range at €143,000: 85 m² at €1,412 to €1,812 per m². Arta tells Agim that similar flats in Tiranë are asking roughly that, that his floor and condition can move it either way, and that homes usually sell for less than they ask. She offers to visit on Thursday to give him a proper figure.

A week later another owner, in Blloku, checks “What’s my home worth?” on sadegre.com and picks Tirana Living among three agencies. The lead reaches Arta with the chip “Seller · about” and the middle of that owner’s range, and the timeline shows the card **Asked what their home is worth** before she calls.

CHAPTER 5

Viewings and deals

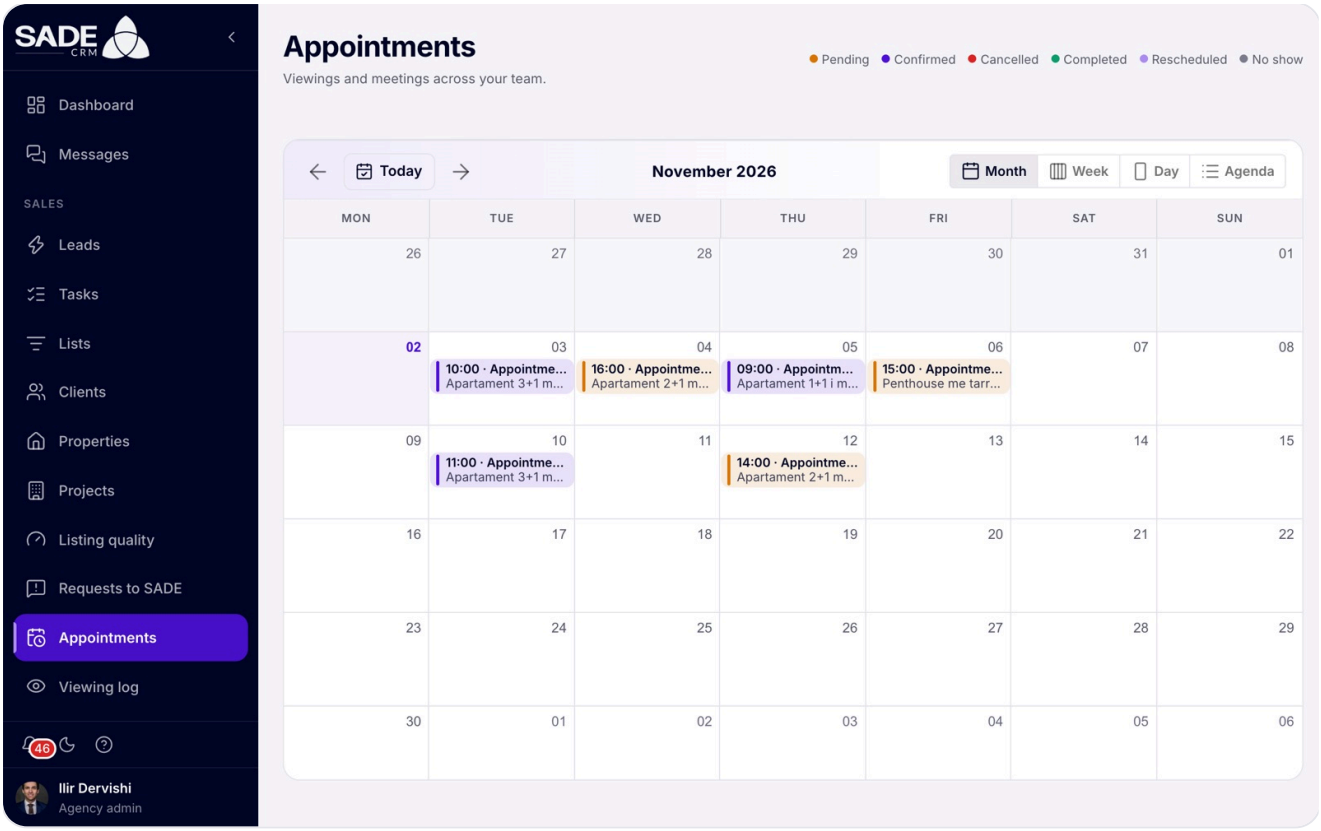
Calendar and viewings

Book viewings of listings and projects on the Appointments calendar, track their status, record how they went and ask the client to confirm.

Appointments is your agency's calendar of viewings. Every appointment is a viewing: of a listing, of a project, or of one unit in a project. Agents and agency admins book them, change their status and record how they went.

The **Viewing log** is the same viewings as a table. It holds the outcome of each viewing and the client's own confirmation that they saw the home with you. When a seller lists with several agencies, that record shows who showed the home first.

	Agent	Agency admin
Sees on the calendar and in the Viewing log	Their own viewings	Every viewing in the agency
Books a viewing	Of listings assigned to them, and of projects	Of any listing in the agency, and of projects
Records an outcome or asks the client to confirm	Their own viewings	Any viewing



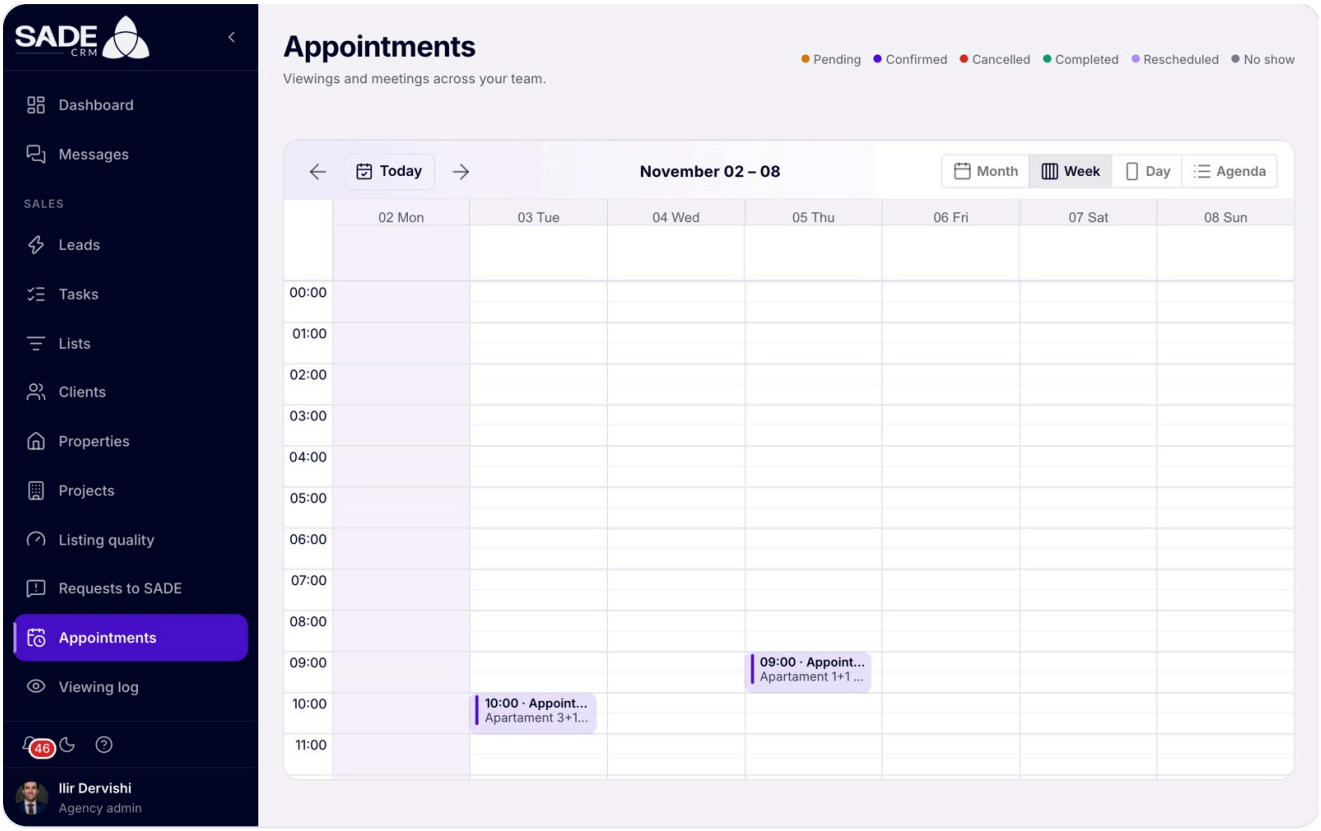
Month view. The coloured dots at the top explain the status colours.

The calendar

Open **Appointments** in the **Sales** part of the menu. The page opens in **Month** view.

- Switch between **Month**, **Week**, **Day** and **Agenda** with the buttons at the top right. **Agenda** lists the viewings one under another.
- Use the arrows (**Previous** and **Next**) to move to another month, week or day, and **Today** to come back to the current date. The calendar loads the viewings of whatever period it shows, past or future.
- Each viewing shows its start time, the client and the agent, and the property. Its colour is its status.
- A viewing is drawn one hour long. Viewings in the past are faded.
- When a day holds more viewings than fit, the month view shows “+2 more” (or however many); click it to see them all.

There is no filter by agent. An admin sees the whole team on one calendar.



Week view, with the day split into hours.

Booking a viewing

1. Open **Appointments**.
2. Click a free day or time in the future. The **New appointment** dialog opens with that date and time filled in. You can't click a day in the past: the CRM says "Appointments can't be made in the past."
3. Choose what the viewing is of: **A listing** or **A project**.
4. For a listing, type in **Search property** and pick it. The other fields open once a property is chosen. For a project, pick the **Project**, then pick a **Unit** or leave it on **The whole project**. Sold units are not offered.
5. Type at least two letters in **Search client** and pick the client.
6. Check **Date and time**.
7. Leave **Status** on **Pending**, or choose another status.
8. Add **Notes** if there is anything the agent should know.
9. Click **Create appointment**.

Field	What to enter
A listing / **A project**	What the client will see.
Search property	The listing. An agent finds only the listings assigned to them; an admin finds all of the agency's listings. Sold and rented listings show "(Sold)" or "(Rented)" after the title.
Project and **Unit**	The project, and one of its units or **The whole project**.
Search client	The client, from at least two letters. For a listing, the listing's owner is left out of the results. An agent finds only clients they work with.
Date and time	When the viewing starts. It can't be in the past.
Status	Usually **Pending**. See statuses.
Notes	Optional. Anything about the viewing.

Whose viewing it is

- When an agent books, the viewing is theirs.
- When an admin books a viewing of a listing, it goes to the listing's assigned agent. If the listing has no agent, the dialog says "This property has no agent assigned. Assign an agent to the property first to create an appointment." and won't save.
- A viewing of a project always belongs to whoever booked it.

Rules

- An agent can't have two viewings within an hour of each other. The CRM refuses with "You already have an appointment with these details scheduled for this time range."
- Viewings of projects need a plan that includes projects. On other plans the CRM says your plan doesn't include projects. See Plans and billing.

What happens when you book

- Every agency admin gets a notification in the bell.
- The agent gets an email naming the client, the property and the date.
- If the client has an email address, they get an email with the property, the date, the time and the agent's name. This is only for a viewing that is **Pending**, **Confirmed** or **Rescheduled**: a viewing booked as Cancelled, Completed or No show sends the client nothing.
- The agent gets a reminder email before the viewing, naming the listing or project and the client. No reminder is sent for a viewing that is Cancelled, Completed or No show.

The wording follows the status. Only a **Confirmed** viewing is called confirmed: the client's email reads "Your viewing is confirmed". For any other status it reads "Viewing booked, waiting for confirmation" and says the agent will be in touch to confirm it.

These emails are written in all 11 CRM languages. The client gets theirs in their own language when the CRM knows it, for example from the language they used on the marketplace or your website form; otherwise in your agency's CRM language. The agent's emails are in the agency's CRM language.

Changing a viewing's status, moving it or deleting it sends no email.

Statuses

Status	Use it when
Pending	The viewing is booked. This is the default.
Confirmed	The client has said they will come.
Rescheduled	The viewing has been moved to a new time.
Cancelled	The viewing won't happen.
Completed	The viewing took place.
No show	The client didn't come.

To change the status, click the viewing on the calendar and pick a new **Status** in the dialog. It saves at once: "Appointment status updated".

When you choose **Completed**, the CRM asks "Was the appointment successful?" and offers to open a deal for the property straight away. Click **Create deal** to go to Deals with the form filled in from the viewing, or **Later (not recommended)** to close it.

> **Note:** deals are for listings. A unit in a project is sold from the project instead: see Holds and sales.

Opening, moving and deleting a viewing

Click a viewing to open it. The dialog shows when it starts and ends, its **Status**, the **Property** (or "Project · Unit"), the **Notes**, and the **Viewing log** card where you record the outcome and ask the client to confirm.

To move a viewing, drag it to a new day or time on the calendar. The CRM shows the current and new time and asks you to confirm with **Reschedule**. Only viewings in the future can be moved, and only to a time in the future. If the new time is taken, the CRM refuses with “Cannot update this appointment to the selected date and time because the hour is already taken.”

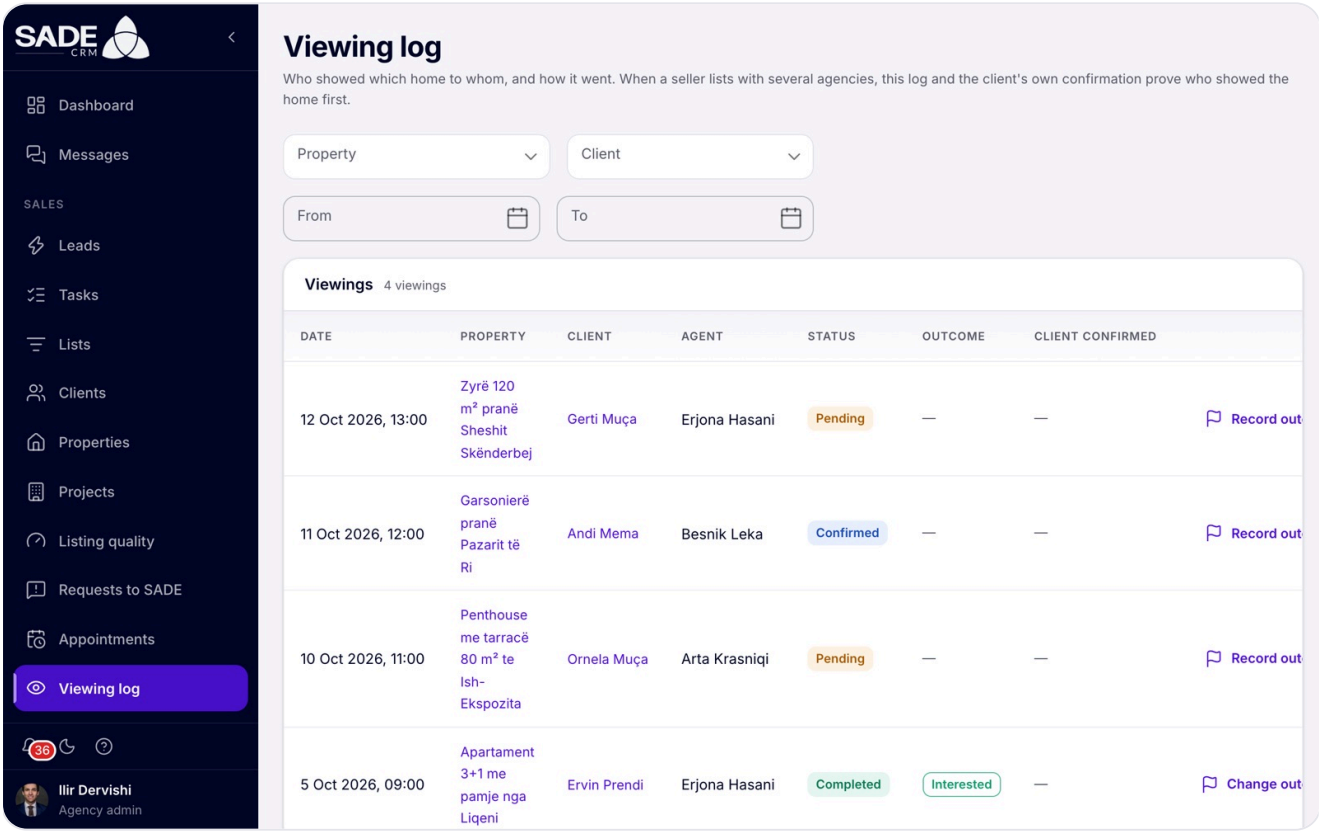
Moving a viewing doesn’t change its status and sends no email. Set the status to **Rescheduled** yourself if you want it to show.

To delete a viewing, open it and click **Delete**.

> **Important:** on the web, **Delete** removes the viewing at once, without asking first. Its outcome and the client’s confirmation go with it.

The Viewing log

Open **Viewing log** in the **Sales** part of the menu. It lists every viewing you can see, newest first, 50 to a page.



The Viewing log as an agency admin.

Column	What it shows
Date	When the viewing was booked for.
Property	The listing, linked to its page, or “Project · Unit”.
Client	The client, linked to their page.
Agent	Whose viewing it is.
Status	The appointment’s status.
Outcome	How it went, once recorded. Hover over it to read the feedback.
Client confirmed	The date the client confirmed, with a green tick. **Link sent** means a confirmation link has been made but the client hasn’t confirmed yet. A dash means no link has been made.

Filter the list by **Property** (type at least two letters), **Client**, and **From** and **To** dates. **Clear filters** shows everything again.

Recording the outcome

After the viewing, write down how it went. You can do it from the Viewing log or from the viewing on the calendar.

1. Click **Record outcome** (it reads **Change outcome** once there is one).
2. In “How did the viewing go?”, pick one outcome.
3. Add **Feedback** if you like: what the client liked, what put them off, what comes next. Up to 4,000 characters.
4. Click **Save outcome**.

Outcome	What it does to the status
Interested	Sets the viewing to **Completed**.
Not interested	Sets the viewing to **Completed**.
Made an offer	Sets the viewing to **Completed**.
Didn’t show up	Sets the viewing to **No show**.

A cancelled viewing stays **Cancelled** whatever outcome you record. When a viewing becomes Completed, the client’s lead stage moves up to **Showing Homes** if it was at an earlier stage.

Recording an outcome doesn't offer to create a deal. To get that prompt, set the status to **Completed** in the viewing's dialog.

Asking the client to confirm

The client can confirm, from their own phone, that they saw the home with you. The CRM keeps the first confirmation and its date as proof.

1. Click **Ask client to confirm**, in the Viewing log or in the viewing's dialog.
2. Choose the **Client's language**: **Shqip** or **English**.
3. Share the link with the client:
   - click **Open WhatsApp** to open a WhatsApp chat with the client and the message already written, then send it yourself; or
   - click **Copy message** (or **Copy link**) and paste it into any app you use with the client.

If the client has no phone number on file, there is no WhatsApp button: copy the message instead.

SADE CRM doesn't send the link for you. It makes the link; you share it. Asking again gives the same link.

The English message reads: "Hello Elton, thank you for viewing "Apartament 2+1 në Bllok". Please confirm it here:" followed by the link.

What the client sees

The link opens a page on the SADE marketplace titled "Confirm your viewing". It names the agent, the agency, the property, the city and the date, and has one button: **Yes, I saw this home**. After the client taps it, the page thanks them and shows the date.

- Only the first confirmation counts. Later taps change nothing.
- If the viewing is cancelled after the link was made, the link stops working and the client sees "This link isn't valid".
- Nobody in the CRM gets a notification when the client confirms. Check the **Client confirmed** column in the Viewing log, or open the viewing: it shows "Confirmed by the client" with the date and time.

On the phone app

The phone app has a **Calendar** tab with a month grid and the chosen day's viewings below it.

- **Book a viewing** opens "New viewing": **Property**, **Client**, **Date & time** and **Notes**. Viewings booked on the phone always start as **Pending**.
- A viewing of a project unit is booked from the unit itself, with **Book a viewing**.

- A viewing's screen has **Reschedule**, **Change status**, **Delete viewing** (which asks first), and the "How it went" and "Client's confirmation" sections.
- There is no Viewing log screen on the phone, and no drag and drop.

See The mobile app.

Example

EXAMPLE

On Monday 2 November, Ilir Dervishi, the admin of Tirana Living Real Estate, books a viewing for Thursday 5 November at 10:00. He clicks the slot, chooses **A listing**, picks "Apartament 2+1 në Bllok" and the client Elton Hoxha, and clicks **Create appointment**. The listing is assigned to Arta Krasniqi, so the viewing is Arta's. Arta gets an email about it, and so does Elton.

On Thursday Elton likes the flat and offers €118,000 if the parking space is included. Arta opens the **Viewing log**, clicks **Record outcome**, picks **Made an offer** and writes "Offered 118,000, wants the parking included". The viewing becomes **Completed** and Elton's stage moves to Showing Homes.

She then clicks **Ask client to confirm**, picks **English** and clicks **Open WhatsApp**. Elton taps **Yes, I saw this home** that evening. The next morning Arta sees the date with a green tick in the **Client confirmed** column.

A week later another agency lists the same flat and claims it introduced Elton. Ilir opens the Viewing log, filters by the property, and has the viewing, the outcome and Elton's own confirmation, all dated 5 November.

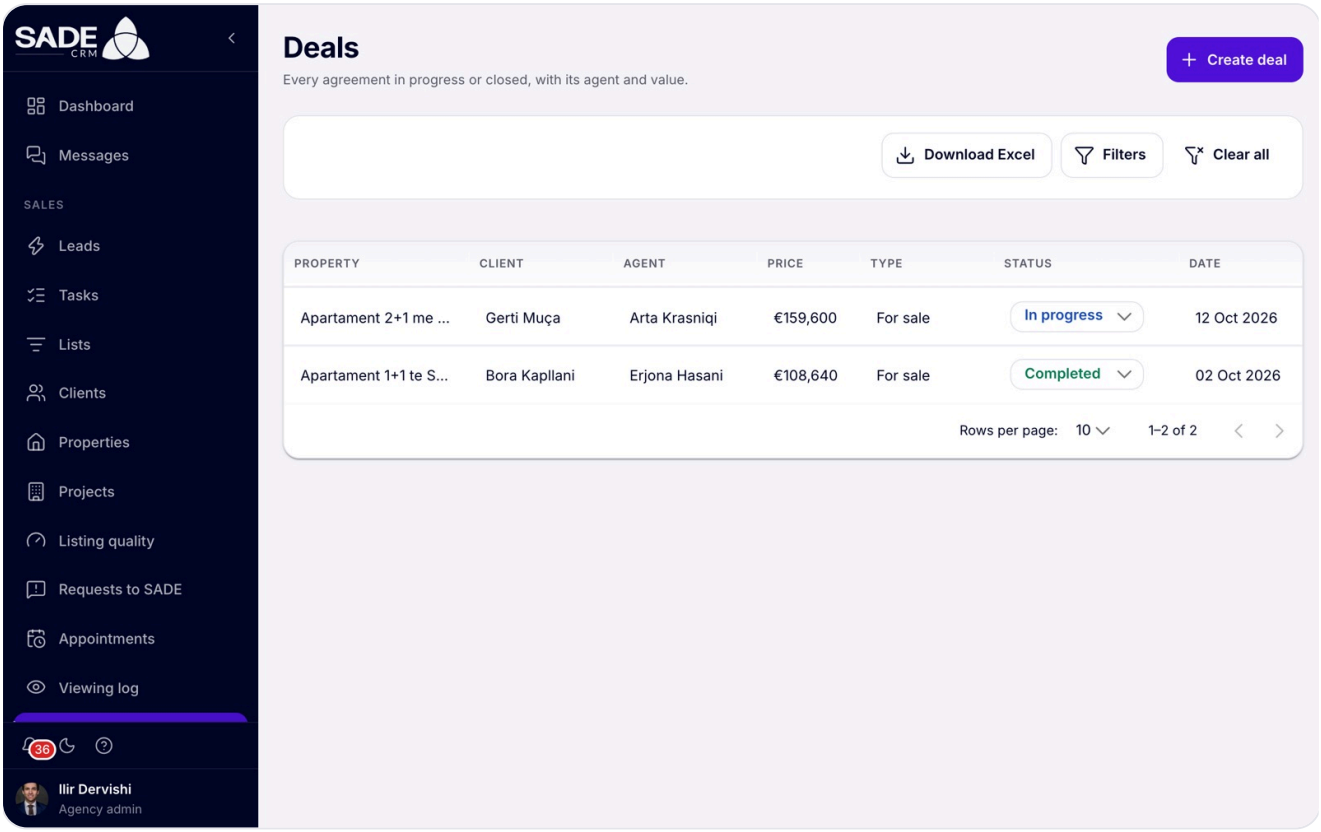
Deals

Record a sale or a rental as a deal, move it through its statuses, close it, export the list to Excel and delete a deal.

A deal records an agreement on one of your listings: a sale or a rental, with the final price, the client, the agent and a status. When a deal is completed, the listing is marked **Sold** or **Rented** and counts in your revenue on the dashboard.

Agents see and manage their own deals. Agency admins see every deal in the agency. Deals have no commission field.

Note: deals are for listings. Units in a project are reserved and sold from the project: see Holds and sales. Completed unit sales still count on the dashboard.



The Deals list. The status of each deal can be changed from its row.

The deals list

Open **Deals** in the **Sales** part of the menu.

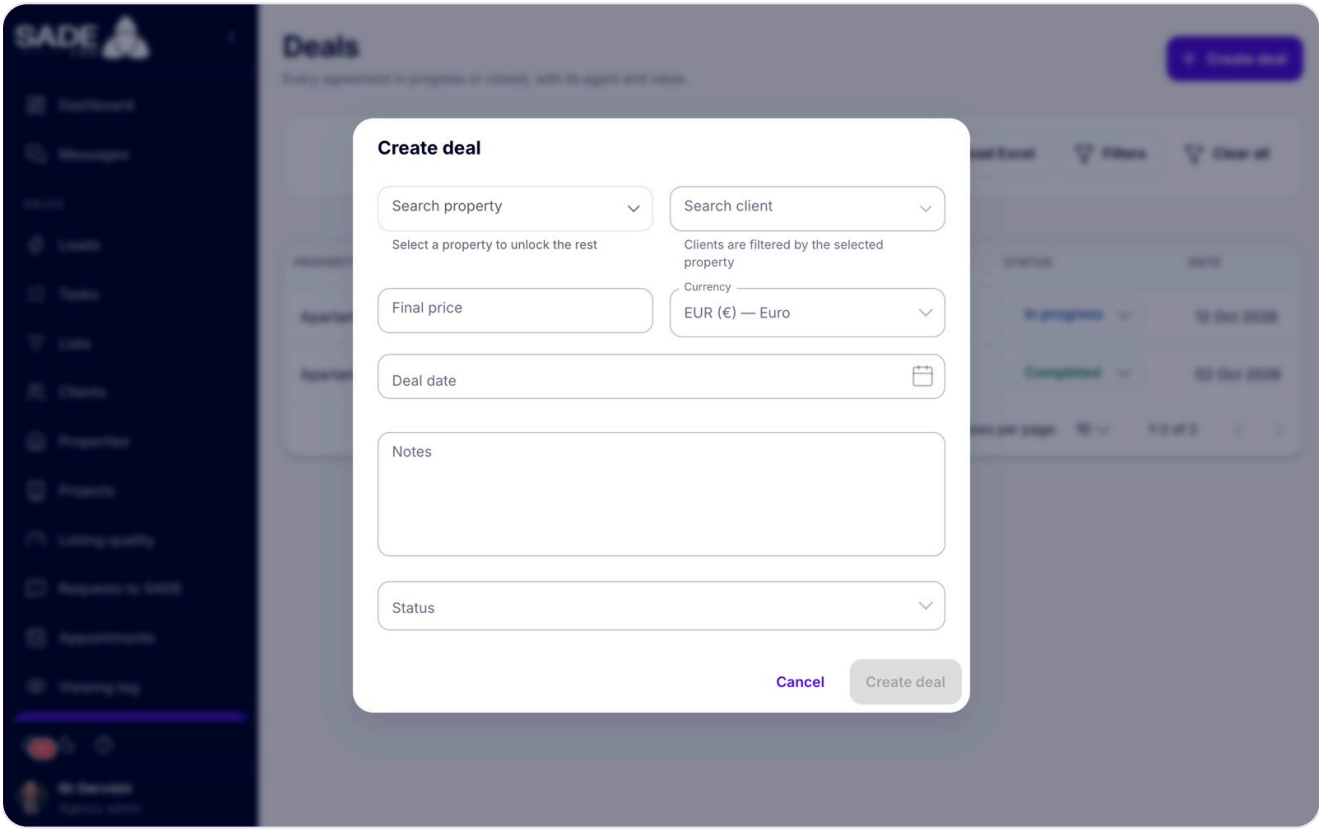
- Each row shows the **Status**, **Property**, **Client**, **Agent**, **Price** (in the deal's own currency), **Type** (For sale or For rent), **Date** and **End date**.
- Click **Filters** to filter by **Agent** (admins only), **Client**, **Property** and **Deal date**. **Clear all** removes the filters.
- Each row has buttons to view the deal, delete it and **Download PDF**.
- Choose 5, 10, 20 or 50 rows per page.

Click a deal to open **Deal details**: the price, currency, deal date, the agent, client and property, who created it and when, and the note.

Deals can't be edited once they are saved. Only the status changes. If a price or a date is wrong on a deal that isn't completed, set it to **Cancelled** and create a new one: a cancelled deal doesn't block a new deal on the listing.

Creating a deal

1. Click **Create deal**.
2. Type in **Search property** and pick the listing. The other fields open once a property is chosen. An agent finds only the listings assigned to them.
3. Pick the client in **Search client**. The listing's owner is left out of the results.
4. Check the **Final price** and **Currency**. Both are filled in from the listing.
5. Choose the **Deal date**.
6. For a listing for rent, choose the **Contract end date**.
7. Write the **Notes**.
8. Choose the **Status**.
9. Click **Create deal**. The CRM says "Deal created".



The Create deal dialog. The other fields open once a property is chosen.

Field	What to enter
Search property	The listing that was sold or rented. Required.
Search client	The buyer or tenant. Required.
Final price	The agreed price or rent. Required.
Currency	The currency of the final price. Required.
Deal date	The day of the agreement. Required. On the web it can't be before today.
Contract end date	Only for rentals, and required there. It must be after the deal date.
Notes	Required. The terms, the deposit, anything worth keeping.
Status	Required. **Pending**, **Approved**, **Completed**, **Cancelled** or **Rejected**. You can move it to **In progress** later.

Creating a deal from a viewing

When you set a viewing to **Completed** on the calendar, the CRM asks "Was the appointment successful?". Click **Create deal**. The Deals page opens with the form filled in from the viewing: the property, the client, the price, the currency, and today as the deal date. Add the notes and the status, then save.

Rules

- **One open deal per listing.** A listing can have only one deal that is Pending, In progress, Approved or Completed. A second one is refused with "This property already has an open or completed deal." Cancelled and rejected deals don't count.
- **The deal belongs to the listing's agent.** When an agent creates a deal, it is theirs. When an admin creates one, it goes to the listing's assigned agent, and **Created by** records the admin. If the listing has no agent, the CRM asks you to assign one first.
- Creating a deal, and every later status change, marks that client's viewings of the listing as **Completed**.
- Every agency admin gets a notification when a deal is created or its status changes.

Statuses

Status	What it means
Pending	The deal is agreed in principle and waiting.
In progress	The paperwork is under way.
Approved	The deal has been approved.
Rejected	The deal was turned down.
Cancelled	The deal fell through.
Completed	The sale or rental is done.

The phone app and the agent profiles call a completed deal **Closed**.

To change the status, pick a new one in the **Status** column of the deal's row. It saves at once: "Status updated".

> **Important:** on the web there is no confirmation step, even for **Completed**. Check the row before you choose.

When a deal is completed

Setting a deal to **Completed**, when you create it or later:

- marks the listing **Sold** (a listing for sale) or **Rented** (a listing for rent);
- cancels the listing's other viewings still to come (**Pending**, **Confirmed** or **Rescheduled**), for any client. Their status becomes **Cancelled**, and they stay in the Viewing log with their outcome and the client's confirmation. Viewings that are already Completed, Cancelled or No show are left as they are;
- adds the deal to **Completed deals** and **Total revenue** on the dashboard.

After that, an agent can't change the deal's status or delete it. Its row is locked for them.

An agency admin can still change a completed deal's status. If they move it to another status, the listing goes back to **Published**.

Download Excel

Download Excel at the top of the list downloads the deals as a spreadsheet. It follows the filters you have set, so filter first to export one agent or one month. An agent's file holds only their

own deals.

The file is in Albanian when your agency's CRM language is Albanian, and in English otherwise. In English it has the columns Id, Title, Amount, Status, Agent, Client and DealDate, and a TOTAL row at the bottom. In Albanian the sheet is called "Marrëveshjet", with the columns Id, Titulli, Shuma, Statusi, Agjenti, Klienti and Data e marrëveshjes, and a TOTALI row.

> **Important:** the TOTAL row adds up the amounts as plain numbers, whatever their currency. If your deals are in more than one currency, filter by one currency's deals or total them yourself.

Download PDF

Download PDF on a row gives a one-page deal report, in Albanian when your agency's CRM language is Albanian and in English otherwise: the agency's logo and name, the property with its main photo, the final price (or agreed rent), the dates and status, the client and the agent with their contact details, and the notes. An agent can download only their own deals' reports.

Deleting a deal

Click the bin on a deal's row and confirm with "Delete this deal?". Deleting can't be undone.

Who	What they can delete
Agent	Their own deals, unless the deal is Completed.
Agency admin	Any deal in the agency, unless the deal is Completed.

Nobody can delete a completed deal.

Deleting a deal doesn't touch the viewings. The client's viewings of the listing stay on the calendar and in the Viewing log, with their outcome, their feedback and the client's confirmation.

> **Tip:** if the deal fell through, set its status to **Cancelled** rather than deleting it, so the deal itself stays on record too.

On the phone app

Agents and admins find deals under **More** → **Deals**. The phone has filter chips (All, In progress, Closed, Lost), **New deal**, **Change status**, **Share PDF report** and **Delete deal**. Before a deal is closed or deleted, the phone asks you to confirm. Closing one says, for a sale, "The property will be

marked Sold, and its other viewings still to come will be cancelled. They stay in the viewing log." Deleting one says "The client's viewings of this property stay in the viewing log." The phone has no Excel export and no filters by agent, client or date.

Example

EXAMPLE

Elton Hoxha agrees to buy "Apartament 2+1 në Bllok", Arta Krasniqi's listing, for €120,000 with the parking space included. Ilir Dervishi clicks **Create deal**, picks the listing and Elton, and changes the **Final price**, filled in from the asking price of €125,000, to €120,000. He sets today as the deal date, writes "Includes parking space", leaves the status on **Pending** and clicks **Create deal**. The deal is Arta's; Ilir is shown as **Created by**.

When the notary signs, Arta sets the deal to **Completed** in the list. The listing is marked **Sold**. Besnik Leka had a Pending viewing of the same flat booked for Saturday with another client; it becomes **Cancelled**, and stays in the Viewing log. The dashboard's **Completed deals** goes up by one and **Total revenue** by €120,000.

At the end of the month Ilir clicks **Filters**, chooses Arta and this month's dates, and clicks **Download Excel** for the monthly meeting. All her deals are in euros, so the total row is right.

Arta's other buyer, for a flat in Komuna e Parisit, walked away before signing. She sets that deal to **Cancelled** rather than deleting it, so the deal stays on record next to the viewings and the client's confirmation in the Viewing log.

Dashboard and reports

What the dashboard shows agency admins and agents, and how the lead-response report counts leads, answer rate and response times.

The **Dashboard** is the first page you see after signing in. It sums up listings, clients, completed deals and revenue: for the whole agency if you are an admin, and for your own work if you are an agent.

Reports is for agency admins. It shows how many leads came in, how fast the team answered them and where they came from. It is a lead-response report, not a sales report: for an agent's sales, open their profile under **Agents** (see Team and roles).

The dashboard for agency admins

Open **Dashboard**, the first item in the menu. Four cards sit at the top.

Card	What it counts	The line under it
Total properties	The agency's listings.	How many were added this month.
Total clients	The agency's clients.	How many joined this month.
Completed deals	Deals with the status Completed, plus completed sales of project units.	How many of them were entered this month.
Total revenue	The final prices of completed deals and completed unit sales, added up for each currency.	This month's revenue.

Revenue is shown one total per currency. Euros and lek, for example, are never added together or converted.

Below the cards:

- **Deals trend**: completed deals per day. Switch between **Week** (the last 7 days) and **Month** (the last 30 days). The number at the top is the last day's count, with its change from the day before, or "No change".
- **Property category distribution**: a pie of the agency's sold and rented listings by category, in percent.
- **Awaiting approval**: up to five of the agency's newest listings still waiting for SADE's review. Click one to open it. See Review and publishing.
- **Top agents**: up to five agents ranked by this calendar month's completed deals and unit sales, with their **Deals**, **Props** (the number of different properties in those deals), **Revenue** per currency and **Score**. Click an agent to open their profile.

The **Score** is deals × 100 plus properties × 10. An agent with two completed deals on two listings scores 220.

> **Note: Completed deals** counts this month by the day the deal was entered in the CRM. **Top agents** counts this month by the deal date. A deal entered on 2 November with a deal date of 30 October is in this month's card line, but not in November's Top agents.

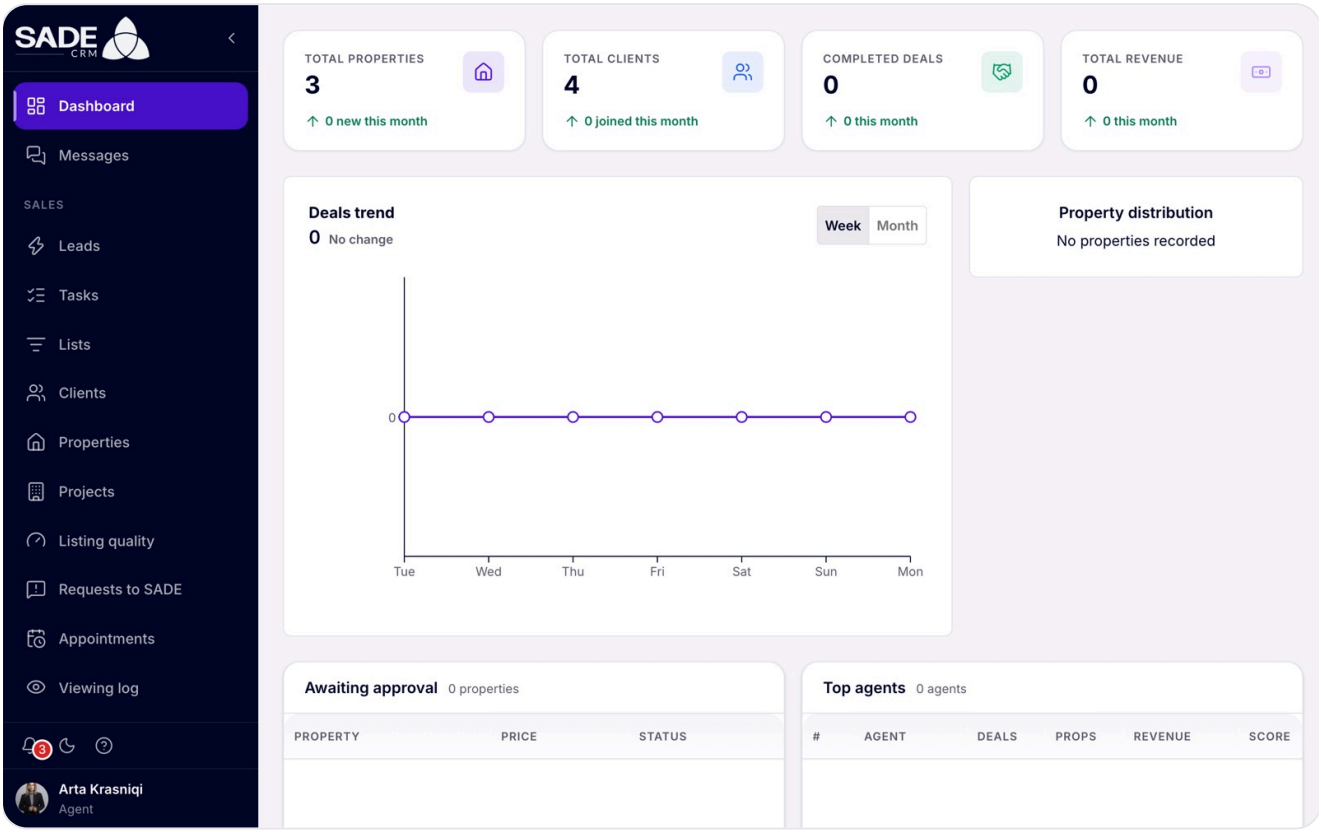
The dashboard for agents

An agent's dashboard has the same four cards and the same two charts, about their own work only:

- **Total properties**: the listings assigned to them.

- **Total clients**: their clients.
- **Completed deals** and **Total revenue**: their own completed deals.
- **Deals trend** and **Property category distribution**: their own deals and their own sold and rented listings.

The **Awaiting approval** and **Top agents** tables are filled in for agency admins only.



Arta Krasniqi's dashboard: three listings, four clients and no completed deals yet.

The dashboard for developers

A company that signed up as a developer gets a projects block above the usual dashboard. It shows units **Available**, **Reserved** and **Sold** across all projects, and **Enquiries** (leads about projects), with a table of up to five projects and an **All projects** link. See Projects overview.

Banners at the top

Two banners can appear above the dashboard, and above every other page:

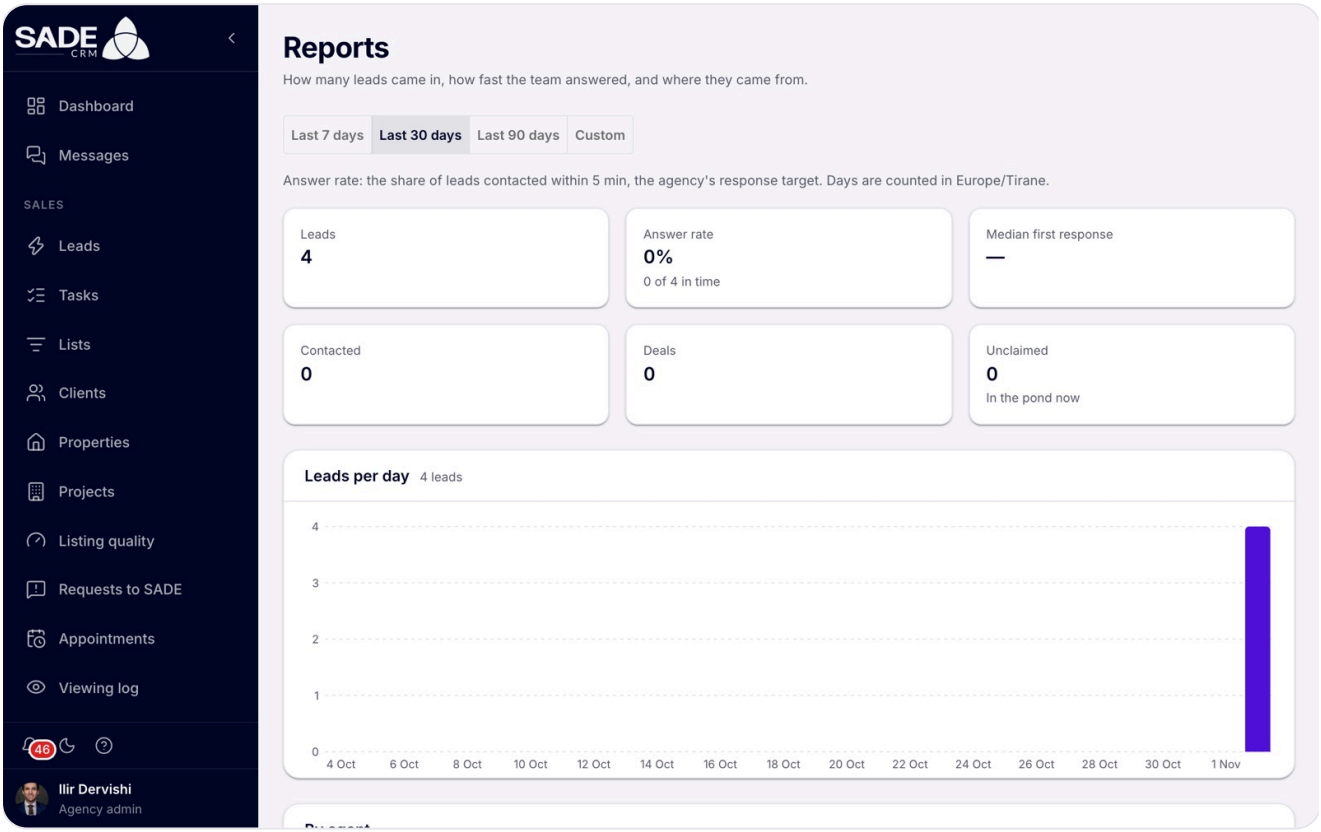
- the plan banner, when your plan has ended or a payment is due (see Plans and billing);
- the verification banner, while your agency is not yet verified and its listings are not on the marketplace (see Verification).

The guided tour

The first time you open the dashboard in a browser, a short tour of its parts starts. Click **Skip for now** to close it, or **Start tour**. To see it again, click the **?** button at the bottom of the menu.

Reports

Open **Reports** in the **Team** part of the menu. Only agency admins have it.



Reports for the last 30 days.

Choosing the period

Choose **Last 7 days**, **Last 30 days** (the default), **Last 90 days** or **Custom**. With **Custom**, set **From** and **To**.

Days are counted in the agency's time zone, which the page names, for example "Days are counted in Europe/Tirane." The time zone is set in Agency settings.

What counts as a lead

A lead here is a new enquiry that starts a response timer: someone new asking to be contacted, or a client you already have who asks again when no timer is running for them. Leads from the marketplace, website forms and your other sources all count. Clients you add by hand are not leads and are not counted.

A lead is **contacted** when someone logs a call, WhatsApp, email, SMS or meeting with them (with any outcome, including No answer), or moves them past **Attempted Contact**. See Following up.

The **response target** is the agency's **Contact new leads within** time in Lead routing. It is 5 minutes unless you change it. The page repeats it: "Answer rate: the share of leads contacted within 5 min, the agency's response target."

The tiles

Tile	How it is counted
Leads	Leads that arrived in the period.
Answer rate	Leads contacted within the response target, as a share of all leads in the period. Leads never contacted count against it. The line under it reads, for example, "16 of 25 in time".
Median first response	The middle time from a lead's arrival to its first contact, among the leads that were contacted. Half were answered faster, half slower.
Contacted	Leads in the period that have been contacted, in time or not.
Deals	How many of those leads' clients have a deal, of any status, created since the start of the period.
Unclaimed	Leads in the period that were never given to any agent: still offered or still in the pond.

Leads per day charts the leads that arrived on each day of the period.

By agent and by source

By agent has a row for each agent who has leads in the period.

Column	What it shows
Agent	The agent whose lead it is now.
Leads	Their leads in the period.
Claimed	How many of those they claimed from an offer or the pond.
Contacted	How many they have contacted.
In time	How many they contacted within the response target.
Median response	Their middle response time.
Deals	How many of those leads' clients have a deal.

An agent's response time counts from when the lead became theirs. For a lead they claimed, that is the moment they claimed it, not the moment it arrived.

By source has the same columns, without **Claimed**, for each source: SADE Marketplace, a website form, a portal and so on. The source is the client's original source. Leads with no source show as "Unknown". Response times here count from the lead's arrival.

There is no export from Reports. The only Excel download in this part of the CRM is on Deals.

> **Tip:** if the answer rate is low, open Leads and look at **Everyone's uncontacted leads** to see who is waiting right now.

On the phone app

The phone's **Home** tab shows the same kind of summary: revenue per currency, deals closed, listings and clients, the activity chart, the coming week's viewings and quick actions. Admins also see listings waiting for approval and the top agents. Reports is not on the phone. See The mobile app.

Example

EXAMPLE

Every Monday Ilir Dervishi, admin of Tirana Living Real Estate, opens **Reports** and picks **Last 7 days**. There were 25 leads. 16 were contacted within the agency's 5-minute target, so the **Answer rate** is 64% with "16 of 25 in time". 21 were contacted in all, and the **Median first response** is 4 minutes. 2 leads are **Unclaimed**, still in the pond.

By source shows most leads came from SADE Marketplace and five from the agency's website form. **By agent** shows Erjona Hasani claimed six leads from the pond and answered five of them in time, counted from when she claimed each one.

He then opens **Dashboard**. Under **Top agents**, Arta Krasniqi leads with 2 deals on 2 listings in November: a **Score** of 220. **Total revenue** shows €228,000 and, as a total of its own, the lek from the agency's one completed rental.

CHAPTER 6

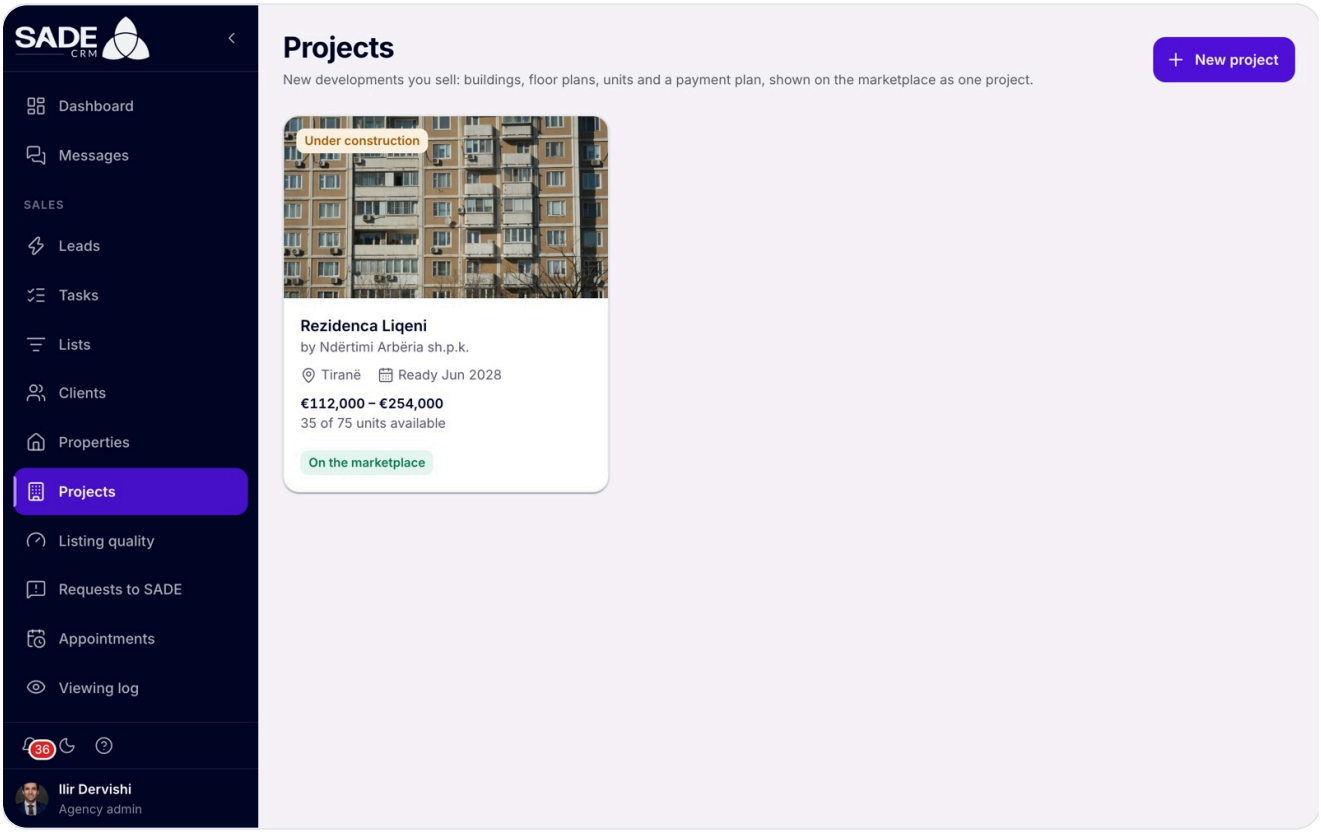
Projects for developers

Projects for developers

Who gets projects, how a developer's CRM differs from an agency's, and the path from an empty project to sold units.

A project is a new development sold off plan or under construction: its buildings, floor plans and units, each with a price and a status, and a payment plan. Buyers see it on the SADE marketplace as one project, with every unit and what is still available, instead of one listing per apartment.

Developers use projects to sell their own buildings. Agencies use them to sell a developer's building on the developer's behalf. Both work the same way, and both can invite other agencies to sell with them.



The Projects page. Each card shows the project's status, completion date, price range, how many units are left and whether it is on the marketplace.

Who gets projects

Projects come with a plan that includes them. The plans are listed on sadecrm.com/pricing.

Your agency	Projects
On the **Pro** plan, or on a Pro trial	Yes
Part of an Enterprise organization	Yes, always
On any other plan	No. The project pages show a card that explains where to get them.

Any agency on such a plan can create projects. It does not have to be a developer.

Without projects on your plan

On a plan without projects, **Projects** and **Partner projects** are not in the menu. If you open a project page from a link, you see a card instead:

- The title reads “Projects come with Pro”.
- It explains: “New developments, their units and the partner network aren’t part of your plan. Nothing you added is lost: it comes back with the plan.”
- An admin also gets a **See plans** button, which opens the agency’s plan and billing page. An agent reads “Ask your agency’s admin about moving to a plan with projects.”

If a plan with projects ends, the agency’s projects leave the marketplace. Nothing is deleted: the projects, units, sales and payments are all there again when the agency moves back to a plan with projects. See Plans and billing.

> **Note:** projects and their units do not count towards your plan’s listing limit.

Developers and agencies

When you sign up, the **You are** field asks whether you are a **Real estate agency** or a **Developer**. A developer starts on a free trial of Pro, the plan with projects, and can only choose plans that include projects.

A developer has the same CRM, the same roles and the same pages as an agency. Only two things change.

The menu order

A developer’s day starts from its projects, so **Projects** moves to the top of the menu, right under **Dashboard**. The sales part of the menu then follows the order of the sales work: **Leads**, **Tasks**, **Lists**, **Clients**, **Appointments**, **Viewing log**, **Deals**, **Partner projects**, **Properties**, **Listing quality** and **Requests to SADE**. Nothing is removed.

For an agency on Pro, **Projects** sits in the sales part of the menu, after **Properties**.

The developer dashboard

At the top of a developer's **Dashboard** are four tiles with totals across all its projects: **Available**, **Reserved**, **Sold** and **Enquiries**. **Reserved** includes units on hold. Below them, a **Projects** table lists the five projects changed most recently, with the same figures for each, and an **All projects** button. The usual dashboard follows underneath.

With no projects yet, the section shows "No projects yet" with a **New project** button for admins. Agents read "Your agency's admins add projects."

Who does what

	Admin	Agent
See the projects and open every project	Yes	Yes
Create, edit, publish and delete projects	Yes	No: every field is read-only
Add, edit and delete units	Yes	No
Hold and reserve available units	Yes	Yes
Move a sale on or cancel it	Any sale	Their own sales, and they can cancel only a reservation
See the **Prices**, **Partners** and **Widget** tabs	Yes	No
See **Buyer payments**	Every sale	Their own sales only, read-only

Agencies invited to sell your project, your partners, see a reduced version of the building and work only on their own clients. See Selling as a partner.

From an empty project to sold units

This chapter follows the order you will work in:

1. Create the project: its details, location, payment plan, buildings and photos, then publish it on the marketplace.
2. Add the floor plans and trace the building: the layouts on offer, the traced floors and the facade.

3. Add the units and sell them: one by one or many at once, then holds, the waiting list, reservations, contracts and viewings.
4. Work from the building board: every unit on one drawing, coloured by status or by price, enquiries or days unsold.
5. Set prices by rule and watch the sales pace.
6. Put the building on your own website, with enquiries arriving as leads.
7. Invite partner agencies to sell with you, on terms you set. If you are the invited agency, read Selling as a partner.
8. Record buyer payments from the contract to the keys.
9. Open a lender room for your bank: a read-only link with the totals.

> **Tip:** the phone app shows your projects and the building, and you can hold, reserve and book viewings from it. Projects are created and edited in the CRM on the web. See The mobile app.

An example

EXAMPLE

Tirana Living Real Estate sells **Rezidenca Liqeni**, a development by Ndërtimi Arbëria sh.p.k. on the Artificial Lake in Tirana: 75 units in two buildings, Pallati A and Pallati B, ready in June 2028. Tirana Living is on Pro, so **Projects** is in its menu after **Properties**.

Ilir Dervishi, the admin, creates the project with **Ndërtimi Arbëria sh.p.k.** in the **Developer** field and a payment plan of 30% on signing, 50% at the frame and 20% at handover. He adds the two buildings, three floor plans (1+1, 2+1 and 3+1) and the 75 units, traces the typical floor and publishes the project. Because Tirana Living is verified, it is on the marketplace within minutes.

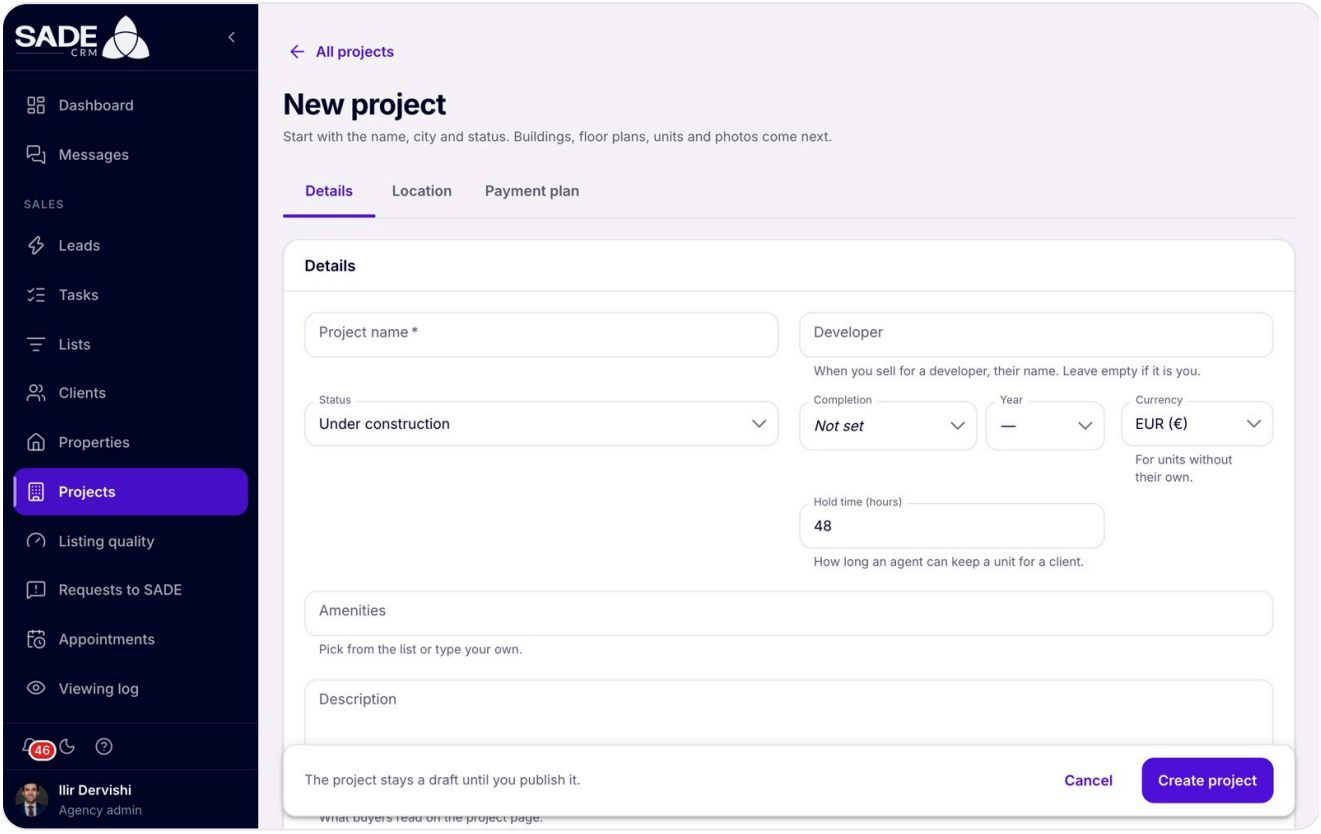
Arta Krasniqi, Besnik Leka and Erjona Hasani hold and reserve units for their clients from the building board. Ilir invites Adriatik Homes to sell too, at 3% commission. When contracts are signed he records the buyers' payments, and he sends the developer's bank a lender link so it can follow sales and collections without a CRM account.

Creating a project

Every field of a new project, its location, payment plan, buildings and photos, publishing it, and the project page buyers see on the marketplace.

A project starts with three things: a name, a city and a status. Everything else, from the buildings to the photos, can come later. The project stays a draft, seen only by your agency, until you publish it.

Only agency admins create and edit projects. Agents open every project but see its fields read-only.



A new project shows only the Details, Location and Payment plan tabs. The rest appear once it is created.

Create the project

1. Open **Projects** in the menu and click **New project**.
2. On the **Details** tab, fill in the **Project name** and any other fields you know.
3. On the **Location** tab, choose the **City**. Place the pin on the map if you want.
4. On the **Payment plan** tab, add the steps if you know them.
5. Click **Create project** in the bar at the bottom. If a tab has a mistake, the page jumps to it.

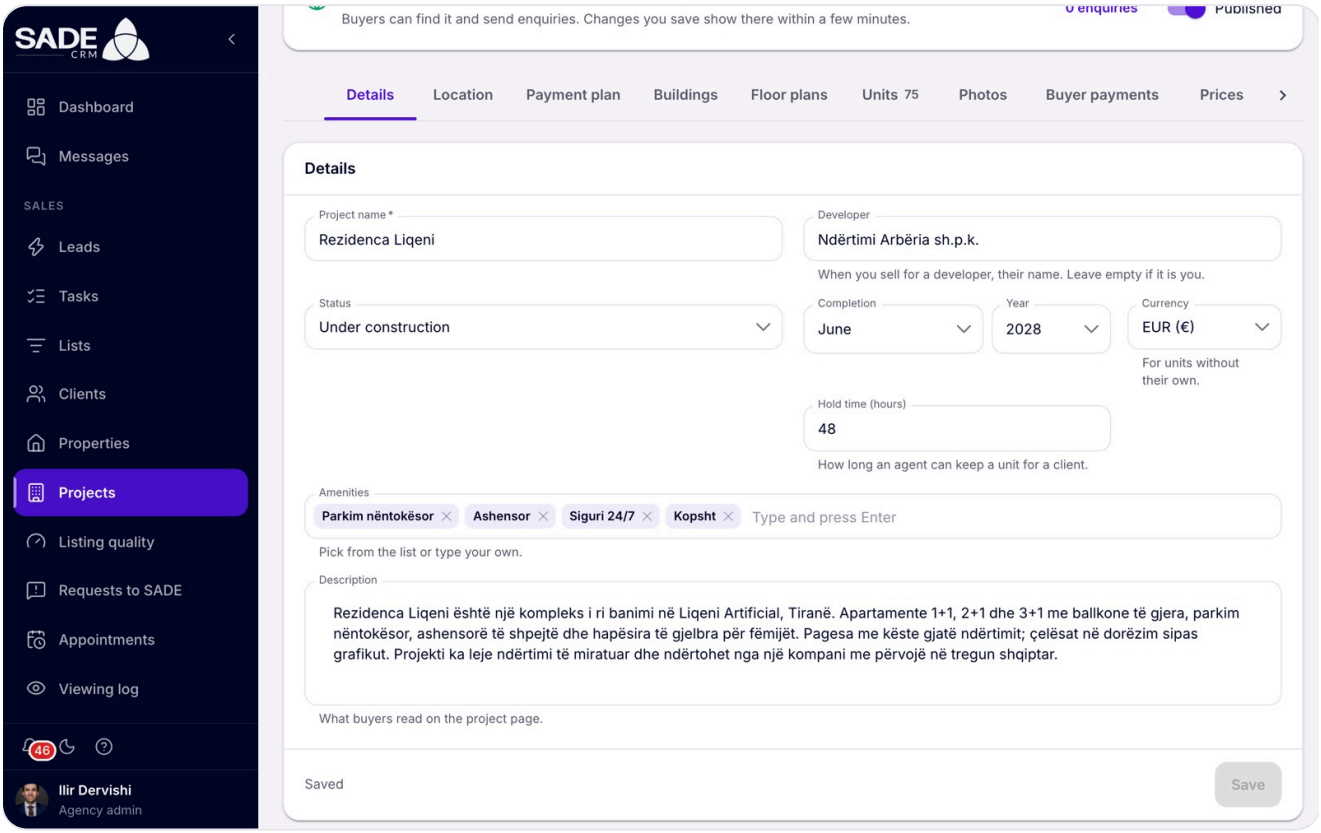
You see “Project created. Add its buildings, floor plans and units next.” and the **Buildings** tab opens. The project now has all its tabs: **Details**, **Location**, **Payment plan**, **Buildings**, **Floor plans**, **Units**, **Photos** and **Buyer payments**, and for admins **Prices**, **Partners** and **Widget**.

Saving changes later

Details, **Location** and **Payment plan** each have their own **Save** and **Discard changes** buttons. The line beside them reads “Unsaved changes”, “Saving…” or “Saved”, and an orange dot on the tab marks unsaved changes there. If you try to leave with unsaved changes, the CRM asks “Leave without saving?” with **Stay** or **Leave**.

Buildings, **Floor plans**, **Units** and **Photos** save each change as you make it.

Details



Field	What to enter
Project name	Required, up to 200 characters.
Developer	When you sell for a developer, their company name. Leave it empty if the project is yours.
Status	**Planned**, **Under construction** (the default) or **Completed**.
Completion	The month and the year the project is ready. Choose both or neither; **Not set** is allowed. The projects list shows it as “Ready Jun 2028”; buyers on the marketplace see “Completion” with the month and year.
Currency	The currency for units that have no currency of their own. EUR by default.
Hold time (hours)	How long an agent can keep a unit for a client: a whole number of hours from 1 to 720. The default is 48. See Holds.
Amenities	Pick from the list (Parking, Garage, Elevator, Gym, Pool, Garden, Playground, 24h security, Concierge, Storage room, Terrace, Sea view), or type your own and press Enter. Up to 50, of up to 60 characters each.
Description	What buyers read on the project page, up to 20,000 characters.

Location

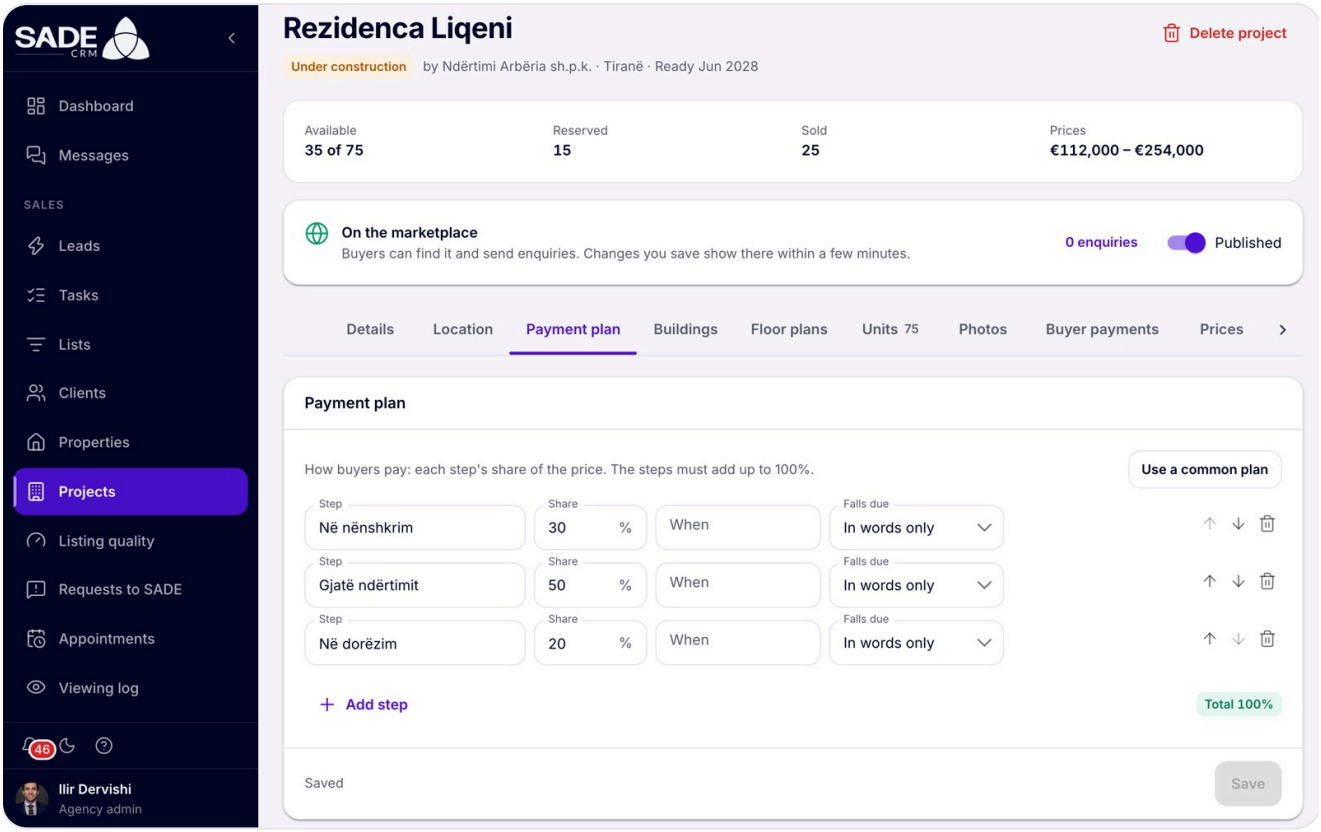
The location puts the project on the marketplace map.

Field	What to enter
City	Required. Type to search.
Neighbourhood	For example “Blloku” or “Liqeni”. Up to 120 characters.
Address	Street and number, up to 500 characters. When you place the pin, the CRM suggests the address from the map: click **Use this** to take it.
On the map	Search, or click where the project is, then drag the pin to adjust it.

The switch **Show the exact location on the marketplace** is on by default, and buyers see the pin and the address. Turn it off and buyers see an area of about 300 m around the pin, and no address.

Payment plan

The payment plan tells buyers how they pay: each step's share of the price. The steps must add up to 100%.



1. Click **Add step**, or **Use a common plan** to start from a ready plan (30 / 70, 20 / 30 / 50, 10 / 40 / 50, or 100% on signing).
2. For each step, fill in:
   - **Step**: its name, such as "On signing".
   - **Share**: its percentage of the price, more than 0 and at most 100.
   - **When**: words buyers read, such as "At contract, June 2027".
   - **Falls due**: when the step is due in the buyer's payment schedule.
3. Use the arrows to change the order, and the bin to remove a step.
4. Check the chip: "Total 100%" turns green when the steps add up. Then click **Save**.

Falls due has four choices:

Choice	The instalment falls due
In words only (the default)	On the contract day for the first step. Later steps have no date until an admin gives them one.
At the contract	On the day the contract is signed.
On a date	On the **Date** you choose.
At a milestone	When a construction milestone is marked reached.

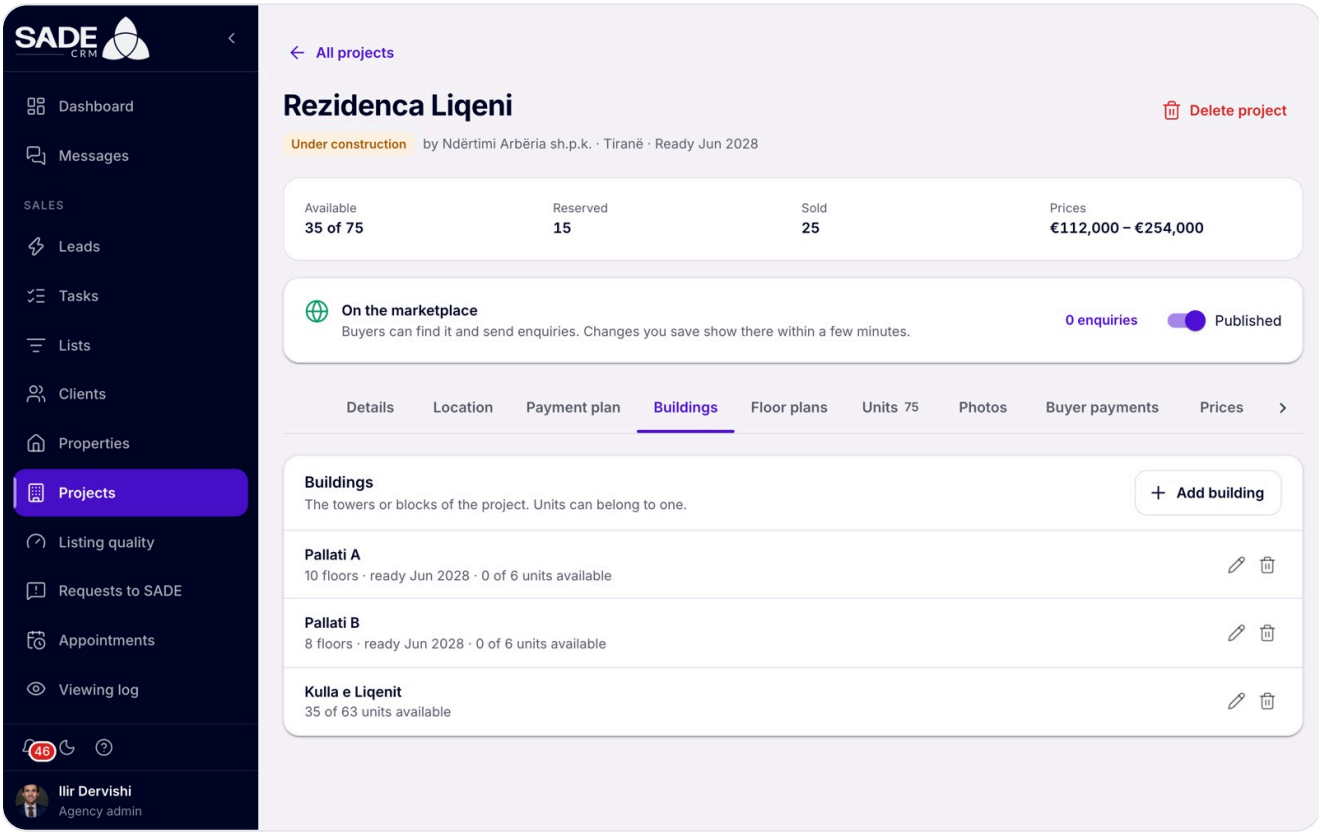
At a milestone stays greyed out until the project has a milestone: add it under Buyer payments first, then come back to the plan.

> **Note:** buyers on the marketplace see only each step's name, share and **When** words. **Falls due** is used only for the buyer payment schedules.

A plan has at most 20 steps. A project with no steps shows no payment plan to buyers.

Buildings

Add one building for each tower or block. A project of one building needs none.



1. Open **Buildings** and click **Add building**.
2. Fill in the **Name** (required), the number of **Floors** (1 to 200) and, if this building is ready at a different time from the project, its **Completion**.
3. Click **Add building**.

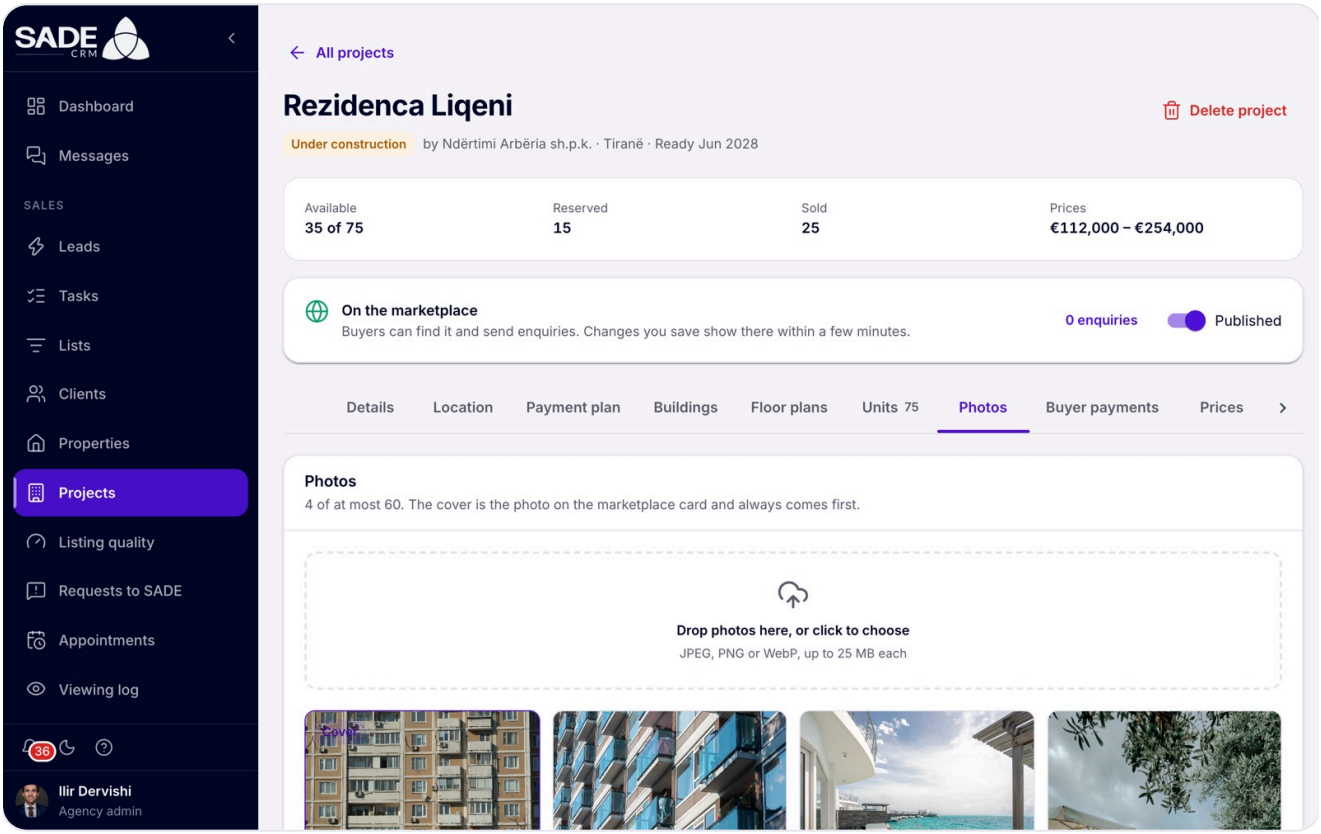
Each row shows the building's floors, when it is ready and how many of its units are available. Use the pencil to edit a building and the bin to delete it. Deleting a building keeps its units in the project, without a building, and deletes its traced floor plans.

Floor plans and units

The layouts on offer, such as "2+1", and the units themselves have pages of their own: see Floor plans and facades and Holds and sales.

Photos

Photos and renders of the project. The cover is the photo on its marketplace card and always comes first.



1. Open **Photos**.
2. Drop the photos on the area, or click it to choose them. JPEG, PNG or WebP, up to 25 MB each. Other files are skipped.
3. Use the arrows (**Show earlier**, **Show later**) to set the order buyers see them in.

4. To change the cover, click **Make it the cover** on another photo.

A project holds up to 60 photos. The first photo you upload becomes the cover; if you delete the cover, the next photo takes its place. Location and camera details are removed from photos when they are uploaded.

Publish on the marketplace

Above the tabs, the header shows the project's status and figures: **Available** ("35 of 75"), **Reserved** (units on hold included), **Sold** and **Prices**, the range over the units still available (or over all units when none is left). Below it, the publishing panel has the **Published** switch and says where the project stands:

The panel says	What it means
"Draft: not on the marketplace"	Only your agency sees the project, here in the CRM.
"On the marketplace"	Buyers can find it and send enquiries. Changes you save show there within a few minutes.
"Published, but hidden for now"	The project is published, but your agency is not verified yet. It appears as soon as SADE has checked your agency's documents.

To publish, turn on **Published**. To take the project off the marketplace, turn it off.

There is no separate review of each project. A project is on the marketplace when it is published and your agency is verified. The panel's enquiries button, such as "3 enquiries", opens **Leads**.

> **Tip:** where SADE offers promotions in your market, a published project can also be promoted on the marketplace. See Promotions.

Delete a project

Click **Delete project** in the header. Its buildings, floor plans, units and photos are deleted with it, and it leaves the marketplace. Enquiries about it stay with your leads. A project with any sale on record cannot be deleted: "This has sales on record, so it can't be deleted."

The marketplace project page

Buyers find published projects on the marketplace's **New developments** page at sadegre.com, on your agency's profile, and on the map. The project page shows:

- the building drawing, with the traced floor plans and facade if you made them;

- the units, with their status: units on hold show as **Reserved**, and sold units are listed without a price;
- the floor plans with their “from” prices, the payment plan, the amenities and the photos;
- the map, exact or as an area of about 300 m;
- an enquiry form, and call and WhatsApp buttons with your agency’s number.

Each enquiry arrives in the CRM as a lead and names the unit the buyer asked about. See Leads.

An example

EXAMPLE

Ilir Dervishi opens **Projects → New project**. On **Details** he types **Rezidenca Liqeni**, puts **Ndërtimi Arbëria sh.p.k.** in **Developer** because Tirana Living sells for them, keeps **Under construction**, chooses June 2028 for **Completion**, keeps EUR and the hold time of 48 hours, and adds Parking, Elevator, 24h security and Garden.

On **Location** he chooses Tiranë, types “Liqeni” as the neighbourhood and drops the pin by the lake. On **Payment plan** he adds three steps: 30% “On signing”, 50% “At the frame” and 20% “At handover”. The chip reads “Total 100%”. He clicks **Create project**.

On **Buildings** he adds Pallati A with 10 floors and Pallati B with 8. He uploads four photos and keeps the render of the lake front as the cover. Then he turns on **Published**: Tirana Living is verified, so the panel reads “On the marketplace”.

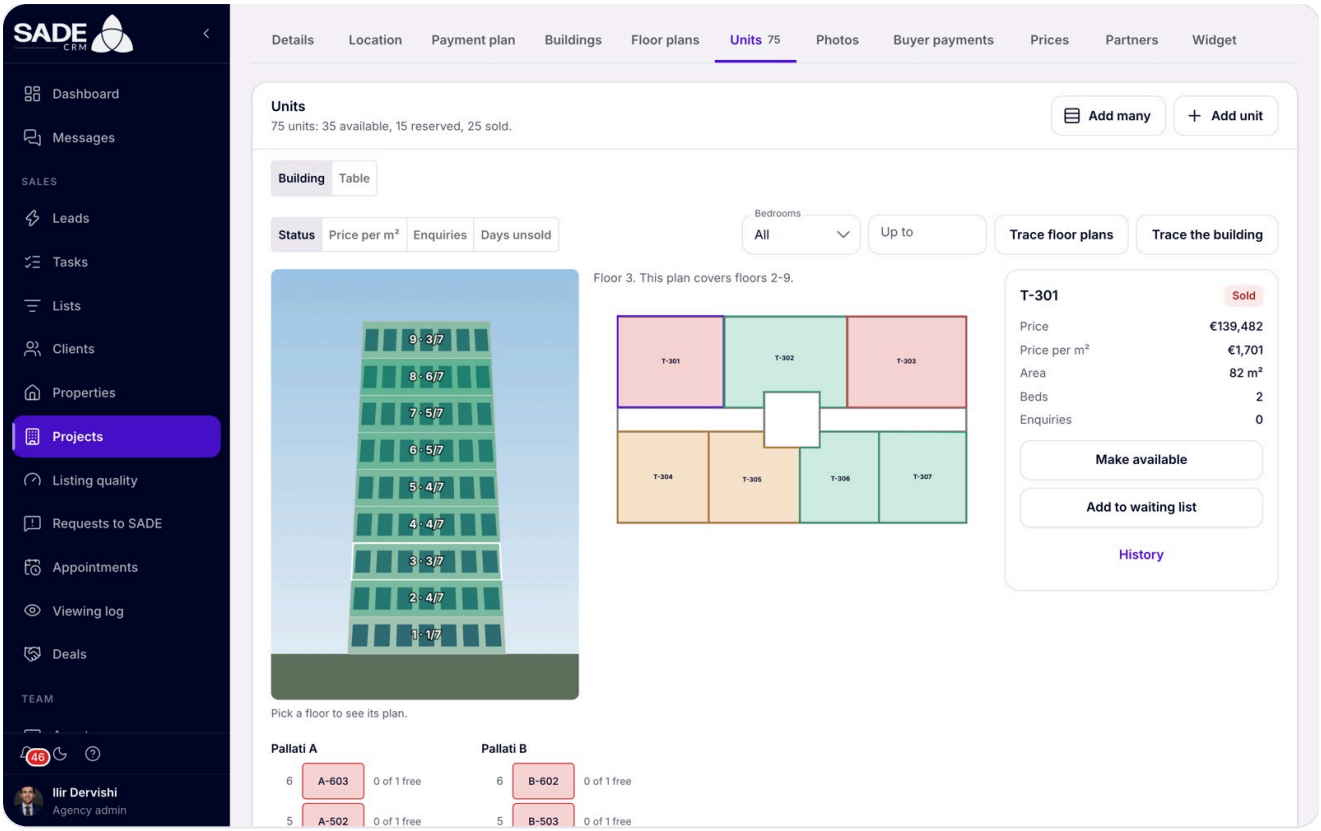
The building board

The drawing of every building, floor and unit with its live status, the four lenses, the filters, and the unit panel you sell from.

The building board is where the sales team works a project. It draws every building as floors and units, top floor first, coloured by status, so you can see at a glance what is free, what is on hold and what has sold. Click a unit and its panel opens beside the drawing, with its figures, its sale or hold, its waiting list and the buttons to act on it.

Every project has a board as soon as it has units: SADE draws it from the units’ buildings, floors and codes, with nothing to upload. If you have traced the floor plans and the facade, the board shows them too.

Admins and agents both use the board. Partner agencies see a reduced version of it (see Selling as a partner).



The board with the facade, the traced plan of floor 3, and unit T-301 picked. Below them, each building is drawn floor by floor.

Open the board

1. Open the project and click the **Units** tab.
2. The **Building** view is selected. The other view, **Table**, lists the units in rows (see The table view).

The line at the top sums the project up, for example “75 units: 35 available, 15 reserved, 25 sold.”

Read the drawing

Each building is drawn under its name, with one row per floor from the top down. Every floor between the lowest and the highest is drawn, even one with no units for sale. Units with no floor come last, and units with no building go into a last drawing called “No building”.

Each floor row ends with how many of its units are free, for example “2 of 4 free”.

On the **Status** lens, each unit is coloured by its status:

Colour	Status	Meaning
Green	**Available**	On sale. Anyone can hold or reserve it.
Blue	**On hold**	Kept for a client for the project's hold time.
Orange	**Reserved**	A client has reserved it.
Red	**Sold**	The contract is signed, or the sale is completed.

The legend gives the number of units in each status.

Choose a lens

The **Show** buttons above the drawing change what the colours mean.

Lens	What it shows
Status	Available, on hold, reserved or sold, as above. The default.
Price per m²	Each unit's price per m², in euros, so units priced in different currencies can be compared.
Enquiries	How many enquiries have named the unit, from the marketplace and from your website widget.
Days unsold	For available units, the days since the unit last became available. Other units have no figure.

The figure lenses paint the units from pale to strong teal. The legend reads "From" the lowest "to" the highest figure, or "No figures yet." when there is nothing to show.

> **Tip:** use **Days unsold** to find the units that have waited longest, and **Enquiries** to see which ones buyers keep asking about. Together they tell you where a price may be wrong. The price book changes prices by rule.

Filter the units

Two filters sit beside the lenses:

- **Bedrooms**: **All**, or a number of bedrooms.
- **Up to**: a highest price. Each unit's price is compared in its own currency.

Units that don't match fade, and the line under the filters reads, for example, "12 of 75 match".

The unit panel

Click any unit on the drawing. Its panel opens on the right; on a narrow screen it slides up from the bottom. With nothing picked the panel reads "Pick a unit on the building to see it here."

The panel shows:

- the unit's code and status;
- **Price**, **Price per m²**, **Area**, **Beds**, **Floor plan**, **Enquiries** and **Days unsold**;
- its sale, if it has one: the client, the sale's stage, the agent and the agreed price, and "Sold by" the partner agency when a partner sold it;
- its hold, if it is on hold: the client, "Held until" a date and time, and the agent;
- the **Waiting list**, numbered, with a × to remove an entry;
- the buttons for what you can do with the unit now, such as **Hold**, **Reserve** or **Contract signed**, and **History**. Admins, and the agent of the sale, also get **Payments**.

Which buttons appear depends on the unit's state and on who you are. Each one is explained in Holds and sales.

Traced plans and the facade

When you have traced floor plans, the board shows the plan of the floor you last picked next to the drawing, for example "Floor 3. This plan covers floors 2-9." Each unit's outline is coloured like the drawing; click an outline to pick that unit.

When you have traced the facade, the render of the building appears too. Each traced floor shows its number and its free units out of the total, for example "3 · 3/7", and is tinted green while it has free units and red when it has none. Click a floor on it to see that floor's plan.

Admins on a desktop-width screen also see the buttons **Trace floor plans** and **Trace the building** here. See Floor plans and facades.

The table view

Click **Table** for the units as rows. Use it to find a unit by its code or to check many units at once.

- The chips at the top filter by status and show the counts: **All**, **Available**, **On hold**, **Reserved** and **Sold**.
- **All buildings** narrows the list to one building.
- **Search code** finds a unit by its code or its floor plan's name.

- The columns are Code, Status, Building, Floor, Floor plan, Beds, Baths, Area, Price, Orientation and Note. Admins also get the edit and delete buttons.

Click a unit’s status chip to open the same actions as the panel.

How fresh the board is

The board reloads every 20 seconds while the page is open, and at once when you come back to the tab. When a colleague reserves a unit, you see it within 20 seconds without reloading the page. Your own changes show straight away.

If the board cannot load, it reads “The building could not be loaded.” Reload the page.

> **Note:** on the phone app, the project’s page has the same building drawing, reloaded every 20 seconds, with the traced plans and the first facade image. Tap a unit to act on it. The lenses and the filters are on the web only. See The mobile app.

An example

EXAMPLE

On Monday morning Erjona Hasani opens **Rezidenca Liqeni → Units**. A client wants a two-bedroom flat for no more than €170,000. She sets **Bedrooms** to 2 and **Up to** to 170000; the units that don’t fit fade.

She switches the lens to **Days unsold**. T-306 shows strong teal: it has been available the longest of the two-bedroom flats. She clicks it. The panel shows €166,000, 98 m², the 2+1 floor plan and no enquiries yet, with **Reserve** and **Hold** at the bottom.

While she calls her client, Besnik reserves A-302 for another buyer. Within 20 seconds Erjona’s board turns A-302 orange, without her reloading the page.

Floor plans and facades

The layouts you sell, tracing each floor's plan and the building's facade, and how every unit finds its place on the drawing.

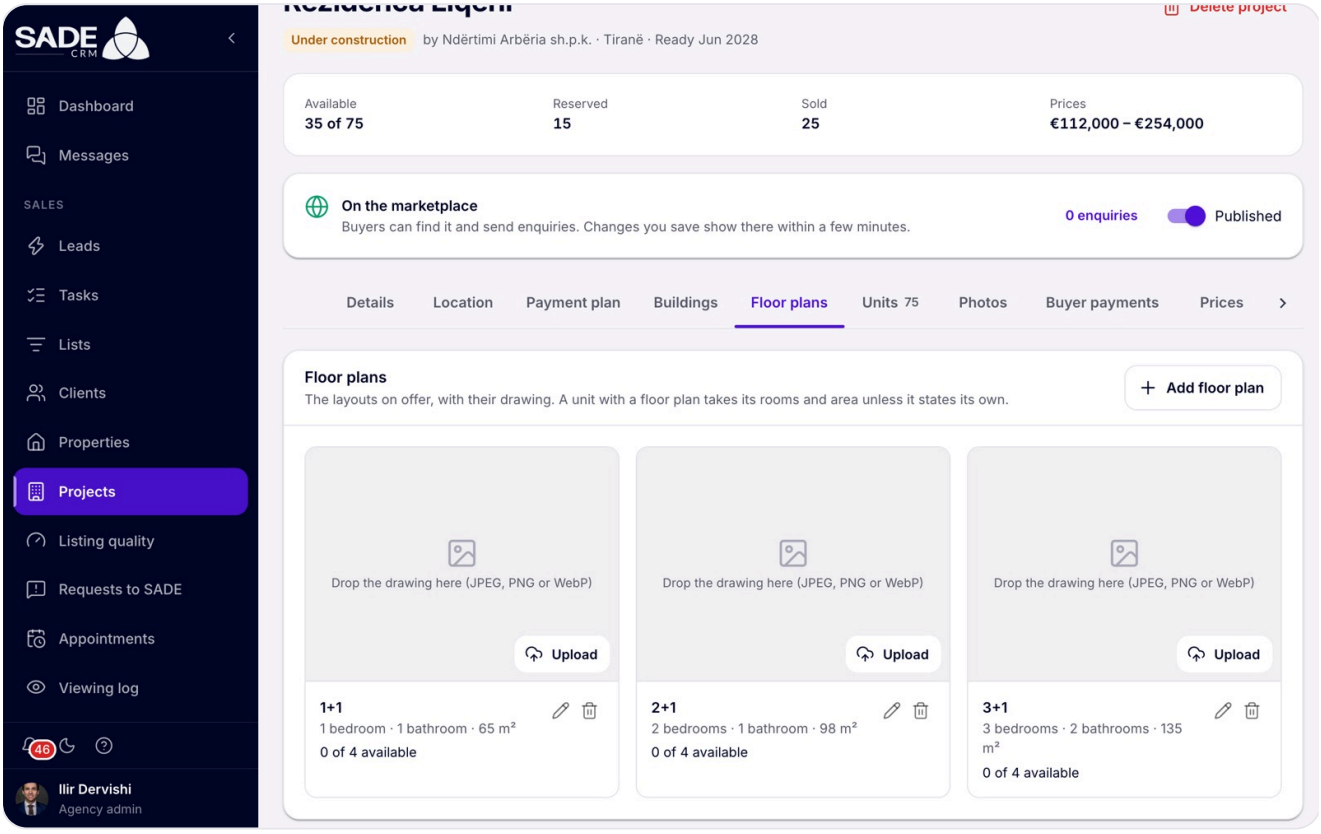
A project has two kinds of drawing, and they do different jobs:

- **Floor plans** are the layouts on offer, such as “1+1” or “2+1 A”, each with its rooms, its area and a picture for buyers. A unit that has a floor plan takes its rooms and area from it.

- **Traced plans and facades** are the architect's drawings of a real floor, and a render or photo of the real building, with each unit or floor outlined by hand. They make the board, the marketplace page and your website widget show the actual building, so a buyer can click the flat they want.

You need floor plans for almost every project. Tracing is optional: without it, the board still draws every building as floors and units.

Floor plans



Three floor plans, each waiting for its drawing.

Add a floor plan

1. Open the project's **Floor plans** tab and click **Add floor plan**.
2. Fill in the fields:

Field	What to enter
Name	The layout's name as buyers know it, such as "2+1 A". Up to 100 characters.
Bedrooms	0 to 50.
Bathrooms	0 to 50.
Area	In m².

3. Save it. The card appears on the tab.
4. Drop the drawing on the card, or click **Upload**. JPEG, PNG or WebP, up to 25 MB. Use **Replace** or **Delete drawing** to change it later.

Each card shows how many units of that layout are available, for example “3 of 8 available”, and “from” the price of the cheapest available one.

Edit or delete a floor plan

When you change a floor plan’s rooms or area, the units that took them from the plan follow the change. Units with their own rooms or area keep them.

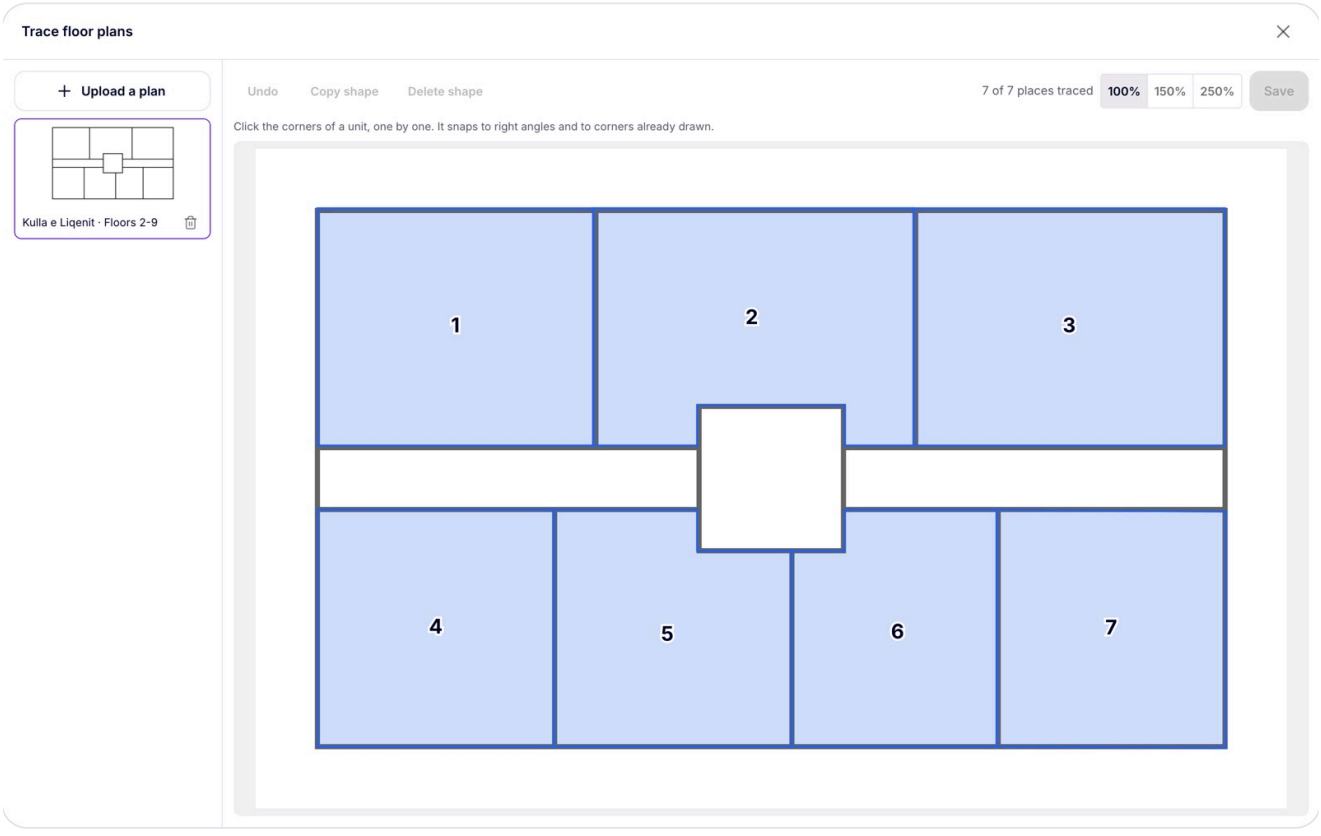
Deleting a floor plan deletes its drawing. Its units keep their rooms and area, without a floor plan.

> **Note:** the floor plan drawings are pictures for buyers. Tracing uses a separate upload, described below.

Trace a floor plan

A traced plan is a drawing of a floor with each unit’s outline clicked around it. One plan can cover many floors that are the same, a **typical floor**, so you trace it once. A plan for a single floor overrides the typical one on that floor.

Tracing is for admins, on the web, on a desktop-width screen.



A typical floor with all seven places traced. Each shape carries the place it belongs to.

1. Open **Units**, keep the **Building** view, and click **Trace floor plans**.
2. Click **Upload a plan** and choose an image or a PDF of the floor.
3. In the dialog:
   - for a PDF, choose the **Page**;
   - choose the **Building**;
   - type the **Floors it covers**, for example “2-9”, or “12” for a single floor;
   - click **Add plan**.
4. The plan opens. The line at the top counts the places still to trace, for example “0 of 4 places traced”. The places come from the units on the floors the plan covers.
5. Click the corners of a unit, one by one. The line snaps to right angles and to corners already drawn. To close the shape, click the first point again or press **Enter**.
6. The new shape takes the next place not yet traced. To give it another one, choose it under **Place on the floor**.
7. Trace the rest of the units the same way. For units with the same shape, select one, click **Copy shape**, then click where the copy goes.
8. Click **Save**. You see “Plan saved”.

Tools

To	Do this
Undo the last point or change	Click **Undo**, or press Ctrl+Z (Cmd+Z on a Mac).
Drop the shape you are drawing, or a copy	Press **Esc**.
Delete a shape	Select it and click **Delete shape**, or press **Delete** or **Backspace**.
Adjust a shape	Select it and drag its corners.
Zoom	Choose 100%, 150% or 250%.

Rules for traced plans

- A plan is an image (or one page of a PDF), up to 25 MB.
- A floor can be in only one typical plan and in only one single-floor plan. Otherwise you see “A floor already has a plan.” A single-floor plan inside a typical one is allowed, and wins on that floor.

- A plan holds up to 200 shapes. Each shape needs at least three points and a place, and two shapes can’t share a place. **Save** stays greyed out until every shape has its own place.
- To remove a plan, click **Delete plan**. Its traced shapes go with it.

Trace the building’s facade

The facade is a render or photo of the building with each floor outlined on it. On the board, the marketplace and the widget, a buyer clicks a floor on the facade to see that floor’s plan. One image can show several buildings.

1. Open **Units**, keep the **Building** view, and click **Trace the building**.
2. Click **Upload a render or photo**. It takes an image, or a PDF, whose first page is used.
3. The floors are listed for every building, top floor first, with a count such as “0 of 18 floors traced”.
4. Click the corners of a floor, one by one, then go on to the next. On a facade the clicks snap to corners only, without squaring, because a building in perspective has no right angles.
5. If a shape belongs to another floor, choose it under **Floor**.
6. Click **Save**. You see “Building saved”.

Each image holds up to 200 traced floors, and each floor can be traced only once on it. A project can have several images; the phone app shows the first. To remove one, click **Delete image**. Its traced floors go with it.

How units find their place

A traced shape belongs to a **place on the floor**, such as “3” or “C”, not to one unit. On a typical floor covering floors 2 to 9, the shape for place 3 is unit A-203 on floor 2, A-303 on floor 3, and so on. SADE works out each unit’s place from its code, in this order:

1. The unit’s own **Place on the floor**, if someone has set it.
2. Otherwise, a letter at the end of the code, after a digit: “A-7C” is place C.
3. Otherwise, the last number in the code, with the floor number taken off the front: A-703 on floor 7 is place 3, and A-1004 on floor 10 is place 4. On the ground floor (0) and below, the whole number is the place.

Name your codes safely

Units land in the right shape when every code ends with the floor number followed by the place, written with two digits:

Code	Floor	Place
A-102	1	2
A-703	7	3
A-1004	10	4
B-612	6	12

Add many → Generate floor by floor makes codes in exactly this form. See Holds and sales.

Codes that number the units through the building, without the floor first, can land on the wrong place. For example, A-12 on floor 1 reads as place 2, because the 1 at the front is taken as the floor.

> **Tip:** if a shape lands on the wrong unit, open the unit with the pencil in the table view, set its **Place on the floor** to the right place, and save. The field is filled from the code, and you can change it for any one unit. It cannot be set by pasting many units.

An example

EXAMPLE

Pallati A has ten floors. Floors 2 to 9 are the same, with four flats each; floor 1 has shops, and floor 10 has four larger flats with terraces. The units were generated as A-101 to A-1004.

Ilir clicks **Trace floor plans → Upload a plan** and chooses the architect's PDF. He picks **Page** 2, **Building** Pallati A, and types "2-9" in **Floors it covers**. The editor reads "0 of 4 places traced". He traces the four flats clockwise; they take places 1, 2, 3 and 4 in turn, and the line reads "4 of 4 places traced". He clicks **Save**.

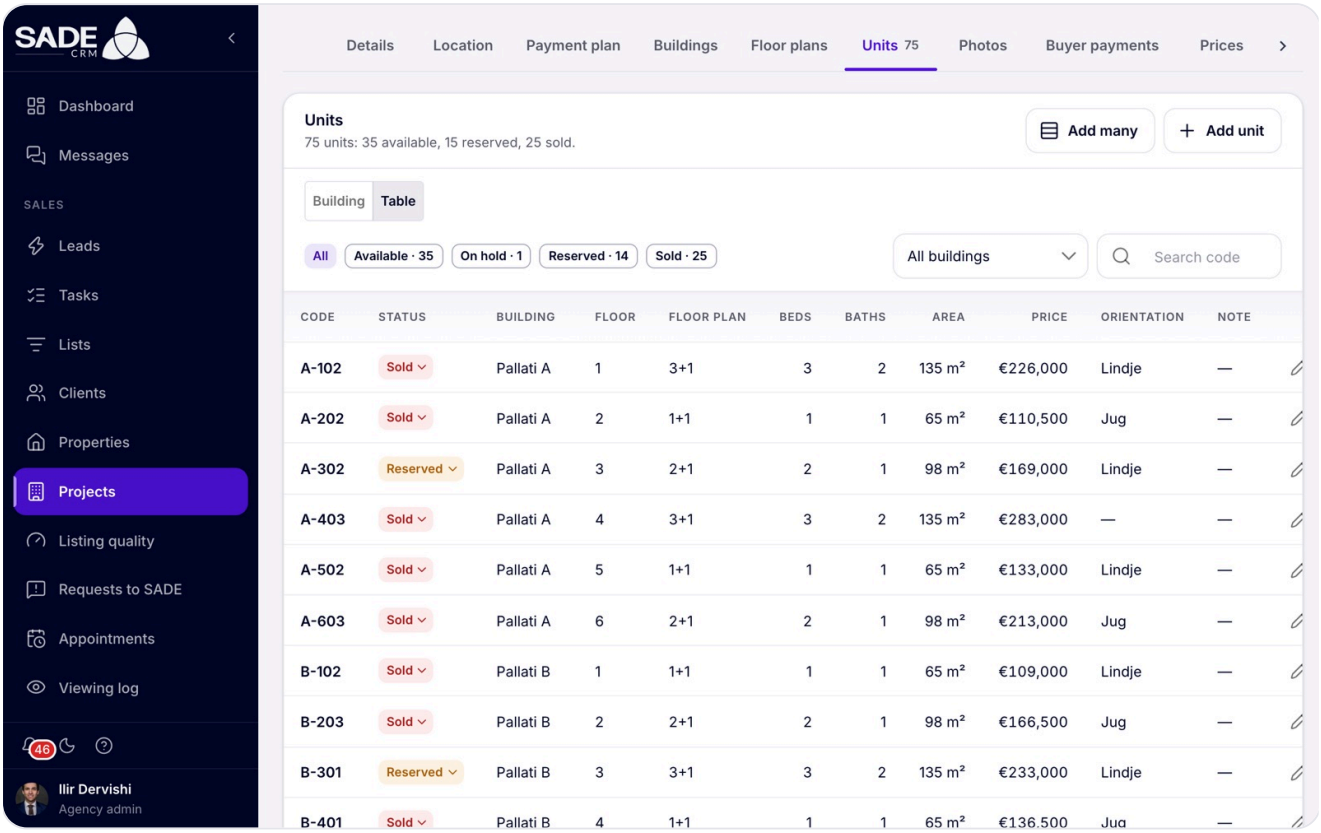
He uploads the drawing of floor 10 with **Floors it covers** "10". It has its own plan, so it doesn't clash with the typical floor. Then he clicks **Trace the building**, uploads the render of both buildings, and traces Pallati A's floors from 10 down to 1 and Pallati B's from 8 down to 1.

On the board, Arta now clicks floor 7 on the facade, sees its plan, and clicks the outline of A-703.

Units, holds and sales

Adding units one by one, from a spreadsheet or floor by floor, then holding, reserving and selling them, the waiting list, each unit's history, and viewings of a project.

A unit is every apartment, shop or parking space you sell in a project. Admins add the units. After that, a unit's status is never set by hand: it follows what the team does with it. An agent holds a unit for a client, reserves it, and moves the sale on to the contract and completion. If the client walks away, the unit becomes available again and the first client on its waiting list is next.



The table view of the units, with a status chip on each row. Click a chip to act on the unit.

Add units

Open the project's **Units** tab. Admins have two buttons at the top: **Add unit** for one unit, and **Add many** to paste a spreadsheet or generate a building floor by floor.

> **Tip:** add the project's buildings and floor plans first. Units are matched to them by name, and a unit with a floor plan takes its rooms and area from it.

One unit

Click **Add unit**, fill in the fields and save.

Field	What to enter
Code	Required, up to 50 characters, and different from every other unit in the project. Write it as the building, the floor and a two-digit place, such as A-102, so it lands on the right shape of a traced plan.
Building	One of the project's buildings, or **No building**.
Floor	A whole number from -10 to 300.
Floor plan	One of the project's floor plans, or **No floor plan**.
Bedrooms, **Bathrooms**	0 to 50. Leave them empty to take them from the floor plan.
Area	In m², up to 100,000. Leave it empty to take it from the floor plan.
Price	Leave it empty for "price on request": the unit shows **On request**.
Currency	The project's currency, unless this unit is priced in another.
Status	Only for a new unit: **Available** (the default), or **Reserved** or **Sold** for a sale made before you used SADE.
Orientation	Pick North, South-east and so on, or type your own.
Note	For your agency only. Buyers never see it.

When you edit a unit later, one more field appears: **Place on the floor**. It is filled from the code; change it only if the unit's shape lands on the wrong unit.

Many units from a spreadsheet

1. Click **Add many** and choose **Paste from a spreadsheet**.
2. Copy the rows from Excel or Google Sheets and paste them in.
3. Click **Read rows**.

If the first row has column names, the columns can be in any order. The names are recognised in English or Albanian, such as "Code" or "Kodi", "Building" or "Kulla", "Floor" or "Kati", "Price" or "Cmimi". Without names, use this order: Code · Building · Floor · Floor plan · Bedrooms · Bathrooms · Area · Price · Currency · Status · Orientation · Note.

The reader understands prices such as "149.000", "€ 149 000" or "1.250.000,00", currencies written as €, $, £, "lek" or a three-letter code, and statuses in English or Albanian, such as "sold", "e shitur" or "rezervuar". Buildings and floor plans are matched by their names.

Generate floor by floor

For a building with the same units on every floor:

1. Click **Add many** and choose **Generate floor by floor**.
2. Choose the **Building**. The **Code prefix** is suggested from its first letter, such as “A-”.
3. Fill in the **First number**, **From floor**, **To floor** and **Units per floor**, and the **Status**.
4. Choose a **Floor plan**, or **Choose per row** to set it on each row. A **Price** is optional; you can set each row’s price in the next step.
5. Click **Make rows**. The line shows what you get, for example “40 units: A-101 to A-1004”.

The codes are the prefix, the floor and a two-digit number, which is exactly the form that places units on traced plans.

Check and add them

Both ways end in the same preview table, where you can correct any row.

- Rows with a problem turn red, with the reason, such as “The code is missing.” or “No building called “Pallati C”: choose one, or add it under Buildings first.” Correct them before adding.
- A row with the code of a unit already in the project replaces it and is marked **Replaces**. That unit keeps its status, which follows its sale.
- Click **Add 40 units** (the button gives the number). You see, for example, “Units saved: 40 added, 0 updated”.

You can add up to 2,000 units at once. If any row is wrong, nothing is saved, so a paste never goes in half done.

Edit or delete a unit

In the **Table** view, admins use the pencil to edit a unit and the bin to delete it. A unit that has a sale on record, even a cancelled one, cannot be deleted.

How a unit's status works

Status	Meaning	How it gets there
Available	On sale.	Added as available, or freed by a released hold or a cancelled sale.
On hold	Kept for one client for the project's hold time.	Someone clicks **Hold**.
Reserved	A client has reserved it.	Someone clicks **Reserve**.
Sold	The contract is signed.	The sale moves to **Contract signed** or **Sale completed**.

Behind a reserved or sold unit is a sale: a record with the client, the agent, the agreed price and the dates. It moves from **Reserved** to **Contract signed** to **Completed**, or it is cancelled. A sale never goes back a step: "This sale can't go back. Cancel it and start again."

You act on a unit from its panel on the building board, or from its status chip in the **Table** view.

Holds

A hold keeps a unit for one client while they decide. Nobody else can reserve it until the hold ends.

1. Pick an available unit and click **Hold**.
2. The dialog reads "The unit is kept for this client for 48 hours. Nobody else can reserve it until then." (with the project's own number of hours).
3. Search for the client among the agency's clients. An admin can also choose the **Agent**; it is **Me** by default.
4. Click **Hold**. You see "Unit on hold".

The panel then shows the client, "Held until" the date and time, and the agent.

- **Hold time** is set per project on the **Details** tab: from 1 to 720 hours, 48 by default.
- A unit can have only one hold. If two people try at the same moment, the second sees "This unit isn't available any more."
- When the hold time is over, the hold ends by itself and the unit is available again.
- To end a hold early, click **Release hold** and confirm. Only the agent who holds the unit, or an admin, can release it or reserve it. Anyone else sees "Another agent is holding this unit."

The waiting list

When a unit is on hold, reserved or sold, anyone can queue a client for it.

1. Pick the unit and click **Add to waiting list**.
2. Choose the client and confirm. You see “Added to the waiting list”.

The list shows in the unit’s panel, numbered. A client can be on a unit’s list only once. The agent who added an entry, or an admin, removes it with the × beside the name.

When the unit frees up, because a hold ended, a sale was cancelled or an admin made it available, the first client on the list leaves it, and their agent is told twice:

- a notification in the CRM: “Rezidenca Liqeni · A-302 is available again”, with “Next on the list:” and the client’s name;
- an email with the same subject.

The unit is not held for them automatically. The agent holds or reserves it as usual.

Reserve a unit

1. Pick the unit and click **Reserve**.
2. Fill in the dialog:

Field	What to enter
Client	The buyer. Filled in for you when you reserve your own hold.
Agent	Admins only, and not on a held unit: whose sale this is.
Agreed price	The unit’s price by default. Change it to the price agreed. It must be more than 0.
Date	Today by default. It can be earlier, but not in the future.
Notes	Anything the team should know, up to 1,000 characters.

3. Click **Reserve**. You see “Unit reserved” and the unit turns **Reserved**.

When you reserve a held unit, the hold becomes the sale, and the unit’s history shows both.

If a partner agency has registered the client you choose, the dialog warns: “A partner has registered this client until” a date, “The sale will count as theirs.”

Move the sale on

The buttons in the unit’s panel follow the sale’s stage.

Button	What happens
Contract signed	Asks for the **Date**. The unit shows as sold from now on. The buyer's payment schedule is made from the payment plan, and a partner's commission is recorded if a partner sold it.
Sale completed	The sale counts towards revenue, in its own currency, and towards its agent's results on the dashboard and their profile.
Cancel sale	Asks for the **Date** and an optional **Reason**. The unit becomes available again, and the sale stays in its history. A completed sale is taken out of revenue again.

Who can do what

The unit is	An admin sees	An agent sees
Available	**Reserve**, **Hold**	**Reserve**, **Hold**
On hold	**Reserve**, **Release hold**, **Add to waiting list**	**Reserve** and **Release hold** on their own hold; **Add to waiting list** always
Reserved	**Contract signed**, **Sale completed**, **Cancel sale**, **Add to waiting list**	The same on their own sale; on another agent's, only **Add to waiting list**
Contract signed	**Sale completed**, **Cancel sale**, **Add to waiting list**	**Sale completed** on their own sale; **Add to waiting list**
Completed	**Cancel sale**, **Add to waiting list**	**Add to waiting list**

Every unit also has **History**. A unit with a sale also has **Payments**, for admins and the sale's own agent.

> **Important:** agents can cancel only a reservation. Once the contract is signed, only an admin can cancel the sale.

Units sold before SADE

A unit added as **Reserved** or **Sold** has no sale behind it. Admins see **Make available** on it, which puts it back on sale after a confirmation. If the unit has a real sale, cancel the sale instead.

History

Click **History** on any unit to see every change, newest first, with the date, the time and who made it:

- status changes, such as “Available → On hold”;
- price changes, such as “Price: €165,000 → €169,000”;
- “Added as Sold” for units added with a status.

The history can’t be edited.

Viewings of a project

Viewings of a new building go on the same calendar as any other viewing.

1. Open **Appointments** and create a new appointment.
2. Choose **A project** instead of **A listing**.
3. Choose the **Project**, then the **Unit**, or **The whole project**. Sold units are not offered.

On the phone app, a unit’s sheet has **Book a viewing**. See Calendar and viewings.

What buyers see

The marketplace and your website widget show the units with their status, within minutes of a change. A unit on hold shows as **Reserved**, so buyers can’t tell a hold from a reservation. Sold units are listed without their price.

> **Note:** on the phone app you can do all of this from a unit’s sheet. There, **Reserve** always uses today’s date and you as the agent, and a contract or completion is recorded on today’s date. See The mobile app.

An example

EXAMPLE

Ilir generates Pallati A floor by floor: prefix “A-”, floors 1 to 10, four units a floor. **Make rows** reads “40 units: A-101 to A-1004”. He sets the floor plans and prices on the rows and clicks **Add 40 units**. Pallati B’s 35 units come from the sales office’s spreadsheet: he pastes it with its column names, **Read rows** matches them, and he adds them too.

On Tuesday at 11:00 Besnik Leka shows A-302, a 2+1 of 98 m² at €169,000, to Dorian and Klea Mema. He clicks **Hold** and picks the Memas. The hold time is 48 hours, so the panel reads “Held until” Thursday at 11:00. Arta has another couple interested, so she clicks **Add to waiting list** for them.

On Wednesday the Memas agree €165,000. Besnik clicks **Reserve**: the client is already filled in from his hold, and he changes the **Agreed price** to 165000. A-302 turns orange on everyone’s board.

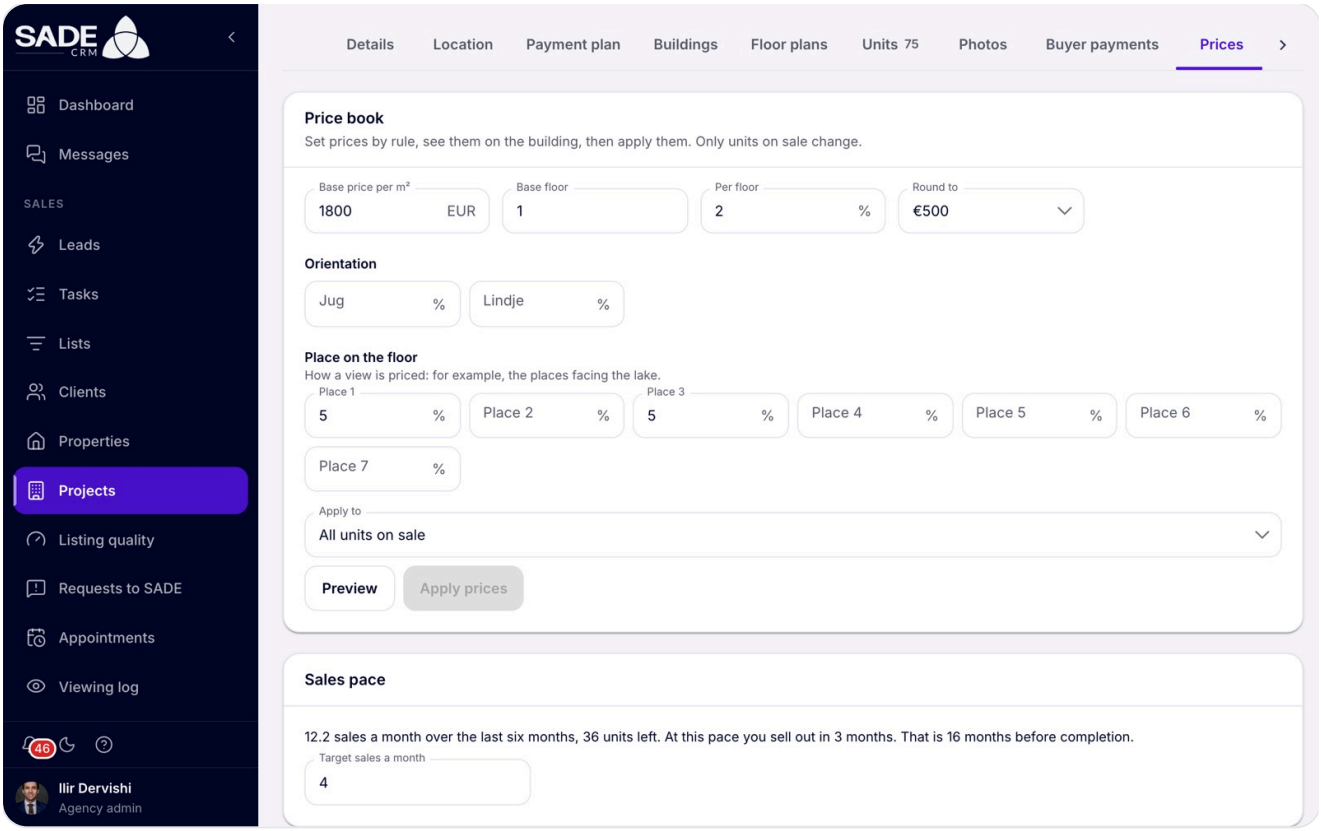
Two weeks later the contract is signed. Ilir clicks **Contract signed** and enters the date. A-302 turns red, and the Memas’ payment schedule is made from the payment plan: €49,500 on signing, €82,500 at the frame and €33,000 at handover.

Price book and sales pace

Setting unit prices by rule, previewing them on the building before applying them, planned price rises, and the project's sales pace.

The price book works out the prices of a project’s units from a few rules: a base price per m², a step for each floor, and extra for the better orientations and views. You preview the result on the building, green where prices rise and red where they fall, and apply it only when it looks right. The same tab holds planned price rises and the project’s sales pace.

The **Prices** tab is for admins, on the web.



The price book of Rezidenca Liqeni, with the sales pace underneath.

How a price is worked out

For each unit, the price book takes the unit's area times the base price per m², then adds or takes off a percentage:

Price = area × **Base price per m²** × (1 + (floors above the **Base floor** × **Per floor** % + the unit's **Orientation** % + its **Place on the floor** %) ÷ 100), rounded to the nearest **Round to**.

Units on floors below the base floor get a negative floor step. A unit with no area gets no price from the rules.

Set the rules

Field	What to enter
Base price per m²	The price per m² on the base floor, in the project's currency. Required.
Base floor	The floor the base price is for. 1 by default.
Per floor	The percentage added for each floor above the base floor, from -50% to 50%.
Round to	1, 10, 100 (the default), 500 or 1,000.
Orientation	One percentage for each orientation your units have, such as "South". From -50% to 50%. Leave one empty for no change.
Place on the floor	One percentage for each place on the floor, such as "Place 1", to price a view: for example, the places facing the lake. From -50% to 50%.
Apply to	**All units on sale**, one building, or one floor plan.

The orientations listed are the ones written on your units, and the places are those worked out from the unit codes.

Preview and apply

1. Set the rules and click **Preview**.
2. Read the summary, for example "28 units change: €4,712,000 → €4,958,500", and look at the building drawn below it. Greener units rise, redder units fall. Units not on sale keep their price.
3. Click **Apply prices**. The CRM asks "Apply these prices?", and tells you each change goes into the unit's history.
4. Confirm. You see "Prices changed on 28 units" (with your own number).
5. Click **Save** at the bottom to keep the rules for next time. You see "Price book saved". Saving changes no price.

> **Important:** only **Available** units change. A unit on hold keeps the price its client was told, and reserved and sold units keep theirs.

Every price change goes into the unit's history, and shows on the marketplace within a few minutes.

Planned rises

A planned rise is a price increase you decide in advance, to apply once a share of the units has sold. It is only a reminder: it never applies by itself.

1. Under **Planned rises**, click **Add a rise**.
2. Fill in the **Rise** (5% by default, up to 50%) and **After sold** (30% by default): the share of units sold that makes it due.
3. Click **Save**.

“Sold” here counts reserved and sold units out of all the project’s units. Units on hold don’t count.

When the share is reached, a banner says so, for example “60% of the units have sold, so the 5% rise is due.” Click **Apply the rise** and confirm “Raise prices by 5%?”. Every available unit goes up by that percentage and is rounded to **Round to**; reserved and sold units keep their price. The rise then shows “Applied” with the date, and can’t be applied twice.

Sales pace

The **Sales pace** card shows how fast the project is selling and when it would sell out at that speed:

- “12.2 sales a month over the last six months, 36 units left.”
- “At this pace you sell out in 3 months.”
- “That is 16 months before completion.”, “That is 4 months after completion.” or “That is the month of completion.”

Sales are counted on the date they were reserved, over the last six months, leaving out cancelled ones. The units left are the available units plus those on hold. With no sales in that time, the card reads “No sales in the last six months.”

Target sales a month is a number you record for the project, from 0 to 10,000. It is saved with the price book.

An example

EXAMPLE

Ilir sets the price book for Rezidenca Liqeni: **Base price per m²** 1,800 EUR, **Base floor** 1, **Per floor** 2%, **Round to** 500. South-facing flats (“Jug”) get 3%, and places 1 and 3, which face the lake, get 5% each. **Apply to** stays on **All units on sale**.

For A-703, a 2+1 of 98 m² on floor 7, facing south, in place 3:

- 98 m² × €1,800 = €176,400;
- six floors above the base at 2% = 12%, plus 3% for the south, plus 5% for the lake view = 20%;
- €176,400 × 1.20 = €211,680, rounded to the nearest 500 = **€211,500**.

He clicks **Preview**, checks the green and red on the building, then **Apply prices**, and **Save**.

He also plans a 5% rise after 60% sold. The project has 75 units, so the rise is due when reserved and sold units reach 45. Today 40 are reserved or sold, so there is no banner yet.

Website widget

Putting a project's building, its availability and an enquiry form on your own website with one line of code, and where those enquiries go.

The website widget puts a project on your own website: the building with its floors and units, what is still available, and an enquiry form. You add it with one line of code. The availability is the same as on the marketplace, so the page on your site never needs updating by hand, and every enquiry arrives in the CRM as a lead.

The **Widget** tab is for admins, on the web.

Before you start

The widget shows only a project that is on the marketplace: published, by an agency SADE has verified. Until then the tab reads “The widget shows once the project is on the marketplace.” See Publish on the marketplace.

You also need someone who can edit your website, or access to its page editor, to paste the code in.

Get the code

1. Open the project and click the **Widget** tab.

2. Choose **Your colour**, the colour of the buttons and highlights. Pick your brand's colour.
3. If the project's country has more than one language, choose the **Language** of the widget, such as **SQ** or **EN**. It starts on the country's own language.
4. Under **Code for your website**, click **Copy code**. You see "Code copied".
5. Paste the code into your website, at the place on the page where the widget should appear.

Below the code, **Preview** shows the widget exactly as it will look, live.

The code is one line, like this:

```
<script src="https://sadegre.com/embed.js" data-project="…" data-market="al" data-lang="sq
```

Part	What it is
`data-project`	Your project. The CRM fills it in.
`data-market`	The marketplace of the project's country, such as `al` for Albania. It is not a choice: it follows the project's location.
`data-lang`	The widget's language.
`data-color`	Your colour, as six hexadecimal digits without the `#`. Anything else is ignored and the widget keeps SADE's colours.

> **Important:** the colour and the language live in the line of code, not in the CRM. To change them, choose them again on the **Widget** tab, copy the new code, and replace the old line on your website.

What visitors see

The widget opens in a frame on your page, as wide as the space you give it, and grows to fit its content. It shows:

- the project's name;
- the building, with its floors and units, and your traced floor plans and facade if you made them;
- which units are available. Units on hold show as **Reserved**, as they do on the marketplace;
- an enquiry form;
- a small "SADE" link to the full project page on the marketplace.

When you sell or reserve a unit in the CRM, the widget shows it within a few minutes.

Where enquiries go

The enquiry form asks for the visitor's name, an email or a phone number, and a message. The visitor can also choose the unit they are asking about, from the units that are not sold.

Each enquiry becomes a lead for your agency:

- its source is **Website widget**;
- the address of the page on your website where the widget sits is recorded with it;
- the unit, if the visitor chose one, is named in the message and counted on the board's **Enquiries** lens;
- your lead routing gives it to an agent like any other enquiry, and the agent's alert names the project.

> **Tip:** every widget lead carries the source **Website widget**, so your agents can tell at once that the buyer found the project on your own site rather than on the marketplace.

An example

EXAMPLE

Ndërtimi Arbëria wants Rezidenca Liqeni on its own website. Ilir Dervishi opens the project's **Widget** tab, sets **Your colour** to the developer's purple, #5011d9, and keeps the **Language** on **SQ** for Albanian. He clicks **Copy code** and emails the line to the developer's web designer, who pastes it on the project page of their site.

That evening Mirela Gjoka opens the developer's site, clicks floor 4 of Pallati B on the facade, chooses a unit in the form and asks whether it has parking. The enquiry arrives in Tirana Living's CRM as a lead from **Website widget**, naming the project and the unit. The routing rules give it to Erjona Hasani, who calls Mirela the next morning.

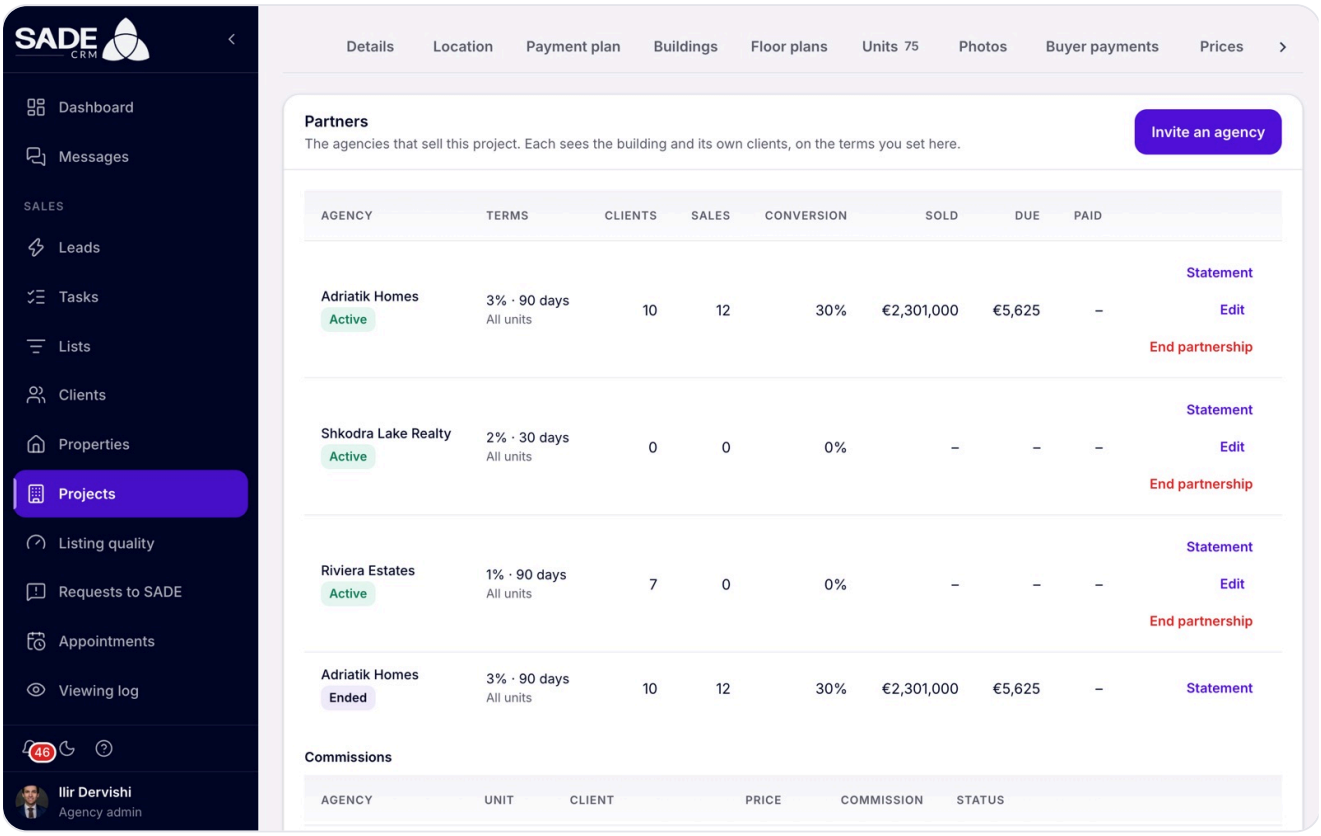
Partner agencies

Inviting other agencies to sell your project, the terms you set, what partners see, whose sale is whose, commissions due and paid, statements, and ending a partnership.

A project sells faster when more agents can offer it. The partner network lets you invite other agencies to sell your project, each on its own terms: a commission, a period during which their clients are protected, and either every unit or only some. Partners see the building and work their own clients, without seeing yours.

SADE records what was agreed and what each partner is owed. It takes no share of the commission and moves no money: you pay your partners as you always have.

The **Partners** tab is for the project's admins, on the web. The agency you invite works from its own **Partner projects** page: see Selling as a partner.



The Partners tab. Each row is one agency, with its terms and what it has sold.

Before you invite

- Your agency needs projects on its plan, and so does the agency you invite. Projects come with Pro, or with an Enterprise organization. See Projects for developers.
- The invited agency's admin accepts the invitation. If the agency isn't on SADE yet, it can sign up from the link in the email, and it starts on a free trial of Pro, so it can accept straight away.

Invite an agency

1. Open the project and click the **Partners** tab.
2. Click **Invite an agency**.
3. Fill in the terms:

Field	What to enter
Agency's email	The address the invitation goes to, usually the agency's admin.
Commission	The partner's share of each sale's price, from 0% to 100%.
Client protection (days)	How long a client the partner registers stays theirs: 1 to 730 days, 90 by default.
All units	On by default: the partner can sell every unit. Turn it off and choose the **Units they can sell**.

4. Click **Invite an agency**. You see "Invitation sent".

The agency gets an email with the subject "Tirana Living Real Estate invites you to sell Rezidenca Liqeni" (with your names) and a link that works for 30 days. The row shows the email address and **Invited** until they accept. When they do, you get a notification, "Adriatik Homes accepted your invitation to sell Rezidenca Liqeni", and the row turns **Active**.

The partners table

Column	What it shows
Agency	The partner, with its status: **Invited**, **Active** or **Ended**.
Terms	The commission and the protection days, such as "3% · 90 days", and **All units** or the number of units.
Clients	The clients the partner has registered on this project.
Sales	The partner's sales of this project.
Conversion	The share of the partner's registered clients who went on to reserve.
Sold	The value of the partner's sales.
Due	Commission recorded and not yet paid.
Paid	Commission you have marked paid.

Money columns are shown per currency. Each row has **Statement**, **Edit** and **End partnership**.

Change the terms

1. Click **Edit** on the partner's row. The dialog is **Change the terms**.

2. Change the commission, the protection days or the units, and click **Save**. You see “Terms saved”.

The partner’s admins get a notification that their terms have changed. A sale already reserved keeps the commission that was in force on the day it was reserved.

What partners see

A partner sees	A partner never sees
The building board, read-only, with only the units you let it sell	Your clients, your leads and your agents’ names
Other agencies’ units as the public sees them: a held unit reads **Reserved**, with no client or agent	Other partners, their clients or their terms
Its own clients, holds, reservations and terms	The waiting lists and enquiry counts
Its own commissions and statement	Your buyer payments, even for the sales it brought

Partners can hold available units, reserve them at the listed price, and cancel their own reservations. The contract, the completion and every later step are yours.

Whose sale it is

The first agency to register a client keeps them, for the protection days you set.

- A partner registers a client on your project, or holds a unit for them, which registers them too.
- Clients are matched on phone number or email, across all partners of the project. If another partner has already registered the person, or your agency already has them on this project (an enquiry, a sale, a hold, a waiting-list place or a viewing), the registration is refused.
- While the protection lasts, the client is the partner’s on this project.

Before a reservation, you see a partner’s registered clients only as a count. When the partner reserves a unit, the buyer’s name, phone and email are copied to your clients, with the source “Partner:” and the partner’s name, or matched to a client you already have. Your admins get a notification such as “Adriatik Homes reserved Rezidenca Liqeni · B-301”. On the board, a partner’s hold shows under the partner’s name, and a partner’s sale reads “Sold by” the partner.

If one of your own agents reserves a unit for a client a partner has registered, the **Reserve** dialog warns: “A partner has registered this client until” a date. “The sale will count as theirs.” It doesn’t

say which partner. If you go ahead, the sale counts as the partner's, and the partner who registered the client first gets it.

> **Note:** matching compares the phone numbers and emails the agencies typed. Nobody confirms them, so a typing mistake makes a different person. Ask your partners to type phone numbers in full, with the country code for foreign buyers.

Commissions

A commission is recorded once, when a partner's sale reaches **Contract signed** (or goes straight to **Sale completed**). It is the agreed sale price times the commission in force on the day the sale was reserved, rounded to the cent. Until then, the table reads "No commissions yet. One is recorded when a sale reaches contract."

The **Commissions** table lists each one with its **Agency**, **Unit**, **Client**, **Price**, **Commission** and **Status**:

Status	Meaning
Due	Recorded and not yet paid.
Paid	You have marked it paid.
Cancelled	You disputed it, or the sale was cancelled before it was paid.

Mark a commission paid

When you have paid the partner, click **Mark paid** on the row. You see "Marked as paid". The partner sees it as **Paid** on its **Commission** tab.

Dispute a commission

If you don't agree that a commission is owed, click **Dispute** on a **Due** row.

1. The dialog reads "Dispute the commission on" the unit, and explains that the partner is told and your reason stays on the record and the statement.
2. Write the **Reason**. It is required.
3. Confirm. The commission becomes **Cancelled**, with your reason, and the partner's admins get a notification.

When a sale is cancelled

Cancelling a partner's sale cancels its commission if it is still due. A commission already marked paid stays paid: settling it is between you and the partner.

Statements

Click **Statement** on a partner's row to download a PDF of that partner's commissions on the project. The partner can download the same statement from its side. Each agency gets it in Albanian when its CRM language is Albanian, and in English otherwise.

End a partnership

1. Click **End partnership** on the row.
2. Read the warning: the partner loses access to the project at once and its holds are released. Sales and commissions stay on record.
3. Confirm. You see "Partnership ended" and the row shows **Ended**.

The partner keeps its **Commission** tab for the project, so it can still see what it is owed and download its statement.

> **Tip:** tell the agency before you end the partnership, so its agents aren't surprised in front of a client.

Limits

- You can send up to 20 invitations a day, or 3 a day while your agency is not yet verified.
- An email can have only one open invitation per project: "This email already has an invitation."
- A partner can register up to 50 clients a day and keep up to 10 units on hold at once.

An example

EXAMPLE

Ilir Dervishi wants more agents on Rezidenca Liqeni. He opens **Partners → Invite an agency**, types the email of Gentian Hoxha, Adriatik Homes' admin, sets **Commission** to 3 and keeps **Client protection (days)** at 90 and **All units** on.

Gentian accepts the next day, and Ilir sees "Adriatik Homes accepted your invitation to sell Rezidenca Liqeni". A week later an Adriatik agent reserves B-301, a 3+1 of 135 m² at €233,000, for a client she registered. Ilir is told, and the buyer appears in Tirana Living's clients with the source "Partner: Adriatik Homes".

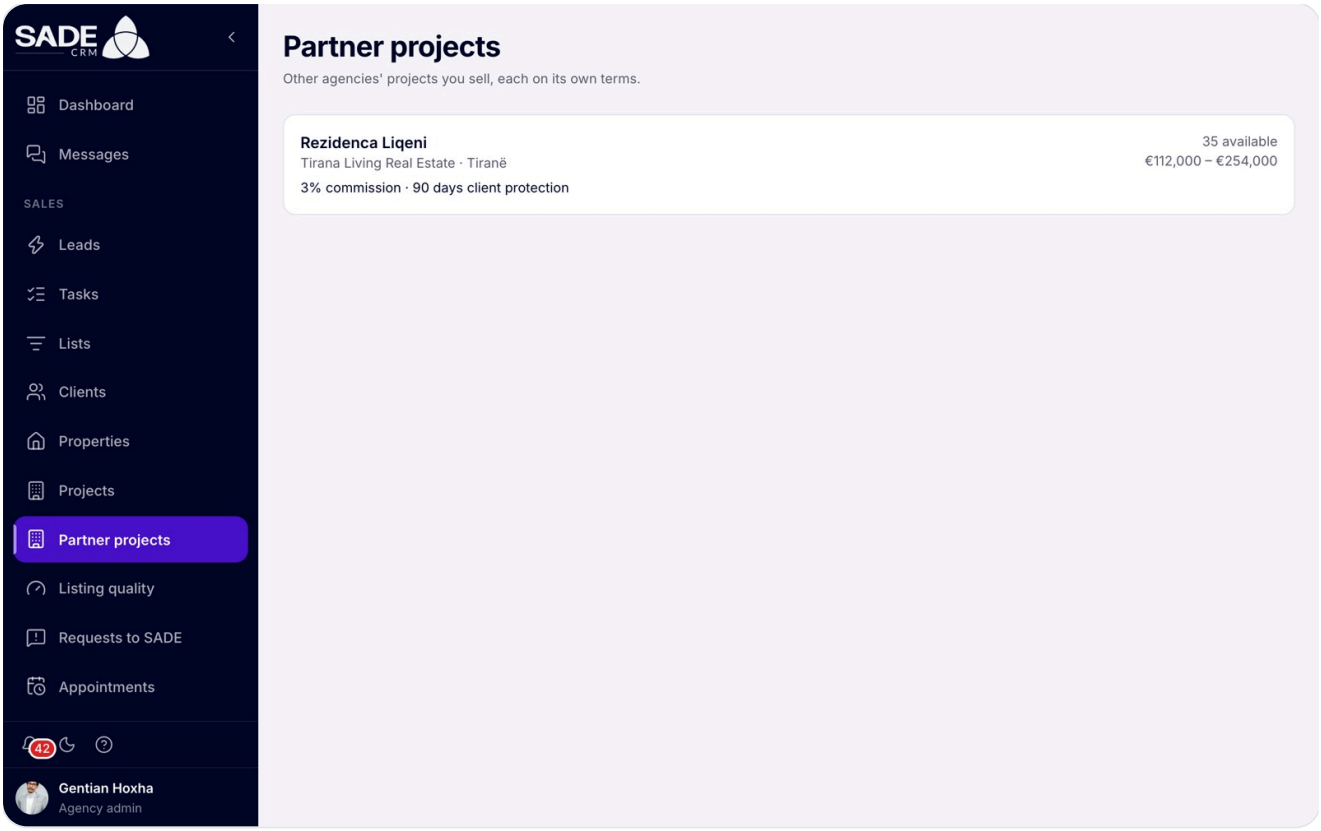
When the contract is signed, Ilir clicks **Contract signed** on B-301. A commission of €6,990.00 (3% of €233,000) appears as **Due** on both sides. At the end of the month Tirana Living pays Adriatik Homes by bank transfer, and Ilir clicks **Mark paid**. Both agencies download the **Statement** for their records.

Selling as a partner

For an agency invited to sell another agency's project, accepting the invitation, the Partner projects pages, registering clients, holding and reserving units on the agreed terms, and your commission.

When a developer, or an agency selling for one, invites your agency to sell its project, you become its partner. You see the building and what is available, you hold and reserve units for your own clients, and you earn the commission the developer agreed with you. Your clients stay yours: the developer sees a buyer's details only when you reserve a unit for them.

Everything a partner does is on the **Partner projects** page in the menu. Your admins and agents both use it, on the web.



Partner projects, as Adriatik Homes sees it. Each card shows the project and your terms.

Accept an invitation

The invitation comes by email, with a link to an invitation page. The page shows who invites you, the project, and the terms, for example “3% commission · 90 days client protection”. You don’t need to sign in to read it.

1. Open the link from the email.
2. If you are signed out, click **Sign in** and sign in with your agency’s admin account. If your agency isn’t on SADE yet, click **Create an agency** to sign up. Your agency then starts on a free trial of Pro, so it can accept the invitation. The browser remembers the invitation for 24 hours and brings you back to it.
3. Click **Accept invitation**. You see “Invitation accepted”, and the project opens.

The developer is told that you accepted.

Only an agency admin can accept. An agent who opens the link reads “Your agency’s admin needs to accept this. Send them the link.” **Not now** leaves the invitation for later; the link works for 30 days.

> **Important:** your agency needs projects on its plan to accept: the Pro plan (a Pro trial counts), or an Enterprise organization. An agency that signs up from the invitation's link starts on a Pro trial, so it has them. On another plan the CRM says "Partner projects come with Pro. Move to Pro, then accept the invitation." See Plans and billing.

If the page reads "This invitation isn't valid", the link has expired or has been used. Ask the developer for a new one.

Your partner projects

Partner projects appears in the menu once your agency sells at least one partner project. It lists them as cards, each with the developer, the city, how many units are available, the price range and your terms.

Open a card to work on the project. It has three tabs: **Units**, **Clients** and **Commission**.

Units

The **Units** tab is the same building board the developer uses, with less on it:

- you see only the units the developer lets you sell;
- the lenses are **Status** and **Price per m²**;
- units held or sold by the developer or by other partners appear as the public sees them: a held unit reads **Reserved**, with no client or agent;
- there are no enquiry counts and no waiting lists.

Click a unit to see its panel and the buttons you can use:

The unit is	You can
Available	**Reserve**, **Hold**
On hold by your agency	**Reserve**, **Release hold**. An agent sees them on their own holds; an admin on all the agency's.
Reserved by your agency	**Cancel sale**, on the same terms.

The contract, the completion and the buyer's payments are the developer's.

Register a client

Registering a client claims them on this project. The first agency to register a client keeps them for the protection days in your terms.

1. Open the **Clients** tab and click **Register client**.
2. Pick one of your agency's clients. They need a phone number or an email.
3. Click **Register client**. You see "Client registered".

The table shows each client with the date **Registered**, **Protected until** and their **Status**: **Protected**, **Reserved** or **Expired**. Agents see the clients they registered; admins see all of the agency's.

If the client is already taken, you see "This client is already registered on this project." That happens when another partner registered the same phone number or email first, or when the developer already has the person on this project, for example from an enquiry or a viewing.

Hold a unit

1. Pick an available unit and click **Hold**.
2. The dialog reminds you: "The first agency to register a client keeps them for 90 days." (with your own number of days).
3. Pick the client and click **Hold**. You see "Unit on hold".

Holding a unit registers the client too, if they weren't already. The hold lasts the project's hold time, set by the developer: 48 hours on Rezidenca Liqeni. When it ends, the unit is available again. To end it sooner, click **Release hold**.

Reserve a unit

1. Pick an available unit, or one your agency holds, and click **Reserve**.
2. The dialog shows the price, for example "Price: €233,000". A partner reserves at the listed price; the price can't be changed here. Talk to the developer if the buyer has agreed a different price.
3. Pick the client.
4. Read the line "Reserving shares the client's name and contact details with" the developer, and click **Reserve**. You see "Unit reserved".

The unit turns **Reserved**. The developer is told, and the buyer's name, phone and email are added to the developer's clients, marked as coming from your agency. From here the developer records the contract and the payments.

Cancel a reservation

If your buyer pulls out, click **Cancel sale** on the unit and confirm with **Cancel reservation**. You see “Reservation cancelled”, and the unit becomes available again.

- You can cancel only a reservation one of your agents made.
- Once the developer has recorded a payment on the sale, you can’t cancel it: “The developer has recorded payments on this sale. Ask them to cancel it.”

When a sale of yours is cancelled, by you or by the developer, your admins get a notification. Your registration of the client comes back, with the time the reservation stood added to its protection.

Your clients stay yours

- The developer sees how many clients you have registered, never who they are, until you reserve a unit for one.
- Other partners never see your clients, your holds’ clients, your terms or your commissions.
- You never see the developer’s clients, leads or buyers’ payments, or other partners’ clients.

Your commission

The **Commission** tab lists your commissions on the project, with the **Unit**, **Price**, **Commission** and **Status**:

Status	Meaning
Due	The developer recorded it when your sale reached the contract.
Paid	The developer has marked it paid.
Cancelled	The sale was cancelled before payment, or the developer disputed it. A disputed commission shows the developer’s reason, and your admins get a notification.

A commission is the agreed price times the percentage in force on the day you reserved. If the developer changes your terms later, your admins are told, and sales already reserved keep the old percentage.

Click **Statement** to download a PDF of your commissions on the project. It is in Albanian when your agency’s CRM language is Albanian, and in English otherwise.

When the partnership ends

If the developer ends the partnership, you lose access to the units and clients at once, and your holds are released. Your sales and commissions stay on record, and the **Commission** tab stays

open so you can still see what you are owed and download your statement.

Limits

- Your agency can register up to 50 clients a day.
- Your agency can keep up to 10 units on hold at once: “Your agency has a lot of units on hold. Release one or reserve it first.”
- Partner projects are on the web only, not on the phone app.

An example

EXAMPLE

Gentian Hoxha, the admin of Adriatik Homes, gets an email: “Tirana Living Real Estate invites you to sell Rezidenca Liqeni”. He opens the link, signs in and clicks **Accept invitation**. Adriatik Homes is on Pro, so the project opens straight away, with 3% commission and 90 days of client protection.

His agent Elsa Marku has a buyer, Arben Kola, looking for a large flat by the lake. She opens **Partner projects → Rezidenca Liqeni → Units**, picks B-301, a 3+1 at €233,000, and clicks **Hold**. Arben is registered and protected for 90 days, and the unit is held for 48 hours.

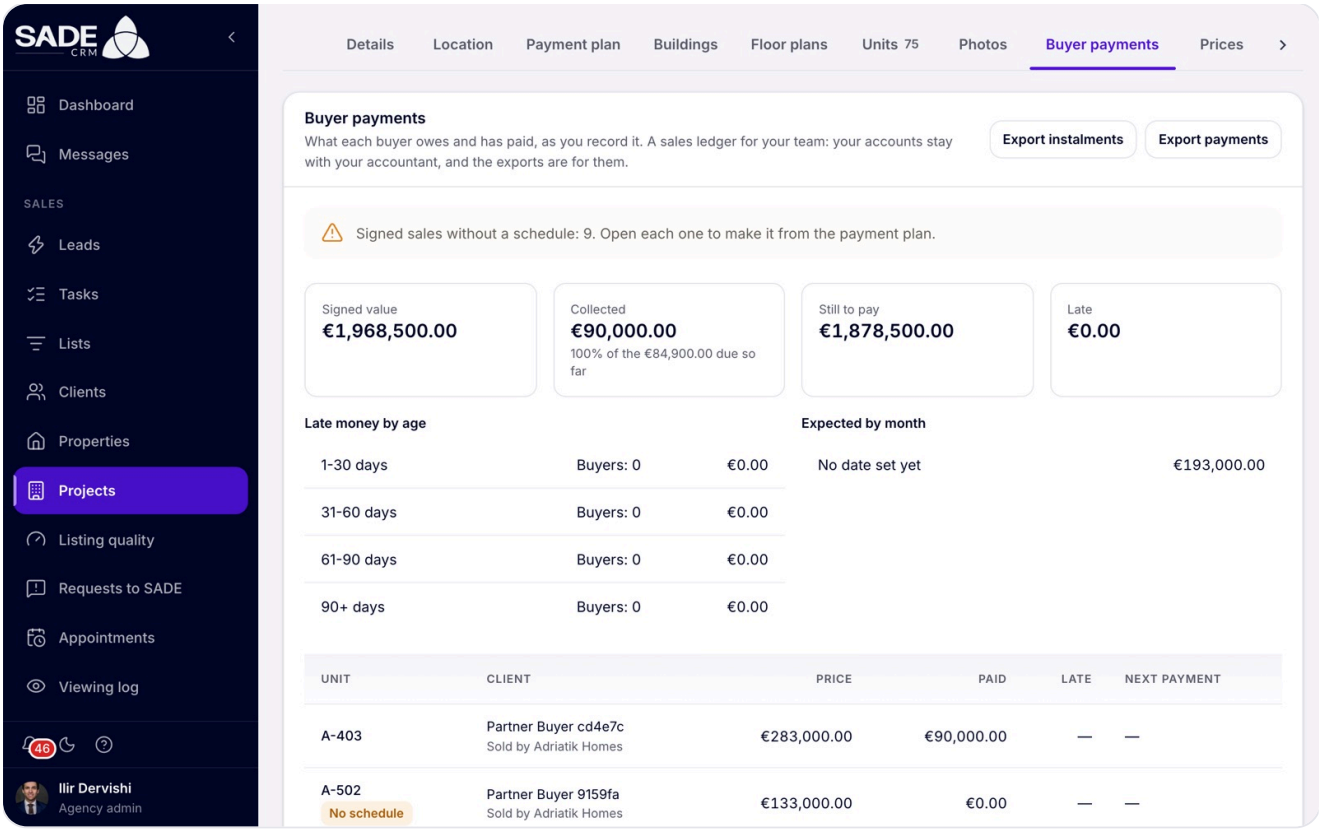
The next day Arben says yes. Elsa clicks **Reserve**, checks “Price: €233,000” and confirms. Tirana Living is told and records the contract the following week. On the **Commission** tab Gentian now sees €6,990.00 **Due**.

Buyer payments

Each buyer's payment schedule from the payment plan, recording payments, refunds and reversals, construction milestones, late money, the monthly forecast, reminders and the exports.

Off-plan buyers pay in instalments over months or years: a share on signing, more as the building rises, the rest at the keys. **Buyer payments** keeps track of it. Each signed sale gets a schedule from the project’s payment plan; you record what the buyer pays, as it reaches your bank; and the CRM shows who is late, by how much, and what you can expect each month.

It is a sales ledger for your team, kept as you record it. Your accounts stay with your accountant, and the exports are for them. SADE never moves money. Nothing recorded is ever changed or deleted: a mistake is reversed, and both entries stay on the record.



The Buyer payments tab of Rezidenca Liqeni. A partner's sales show "Sold by" the partner.

Who sees it

	Admin	Agent	Partner agency
The tab and every sale	Yes	Only their own sales	No, not even the sales it brought
Record payments, change schedules, milestones and reminders	Yes	No	No
Exports	Yes	No	No

Buyer payments are on the web only.

The overview

Open the project and click the **Buyer payments** tab. For each currency, it shows:

- **Signed value**: the price of every signed sale;
- **Collected**: what buyers have paid, with the share of what has fallen due so far, for example "96% of the €412,500.00 due so far";
- **Still to pay**: what is left on the signed sales;

- **Late**: what has fallen due and is unpaid.

Late money by age splits the late money into 1-30, 31-60, 61-90 and 90+ days late, with the number of buyers in each.

Expected by month shows what falls due in each of the next 12 months. Instalments that wait for a construction milestone with a planned date are added as "plus" an amount "if milestones keep to plan". Below the months come "Waiting for milestones with no date" and "No date set yet". With nothing due, it reads "Nothing is due in the next 12 months."

The table lists every sale with its **Unit**, **Client** (with the agent, or "Sold by" the partner), **Price**, **Paid**, **Late** and **Next payment**. Chips mark cancelled sales and sales with **No schedule**. Click a sale to open it.

How a schedule is made

When a sale reaches **Contract signed** (or goes straight to **Sale completed**), the CRM makes its schedule from the project's payment plan: one instalment per step, the price split by each step's share, any leftover cents on the last one.

Each instalment falls due according to its step's **Falls due**:

Falls due	The instalment is due
At the contract	On the contract day.
On a date	On that date.
At a milestone	When you mark the milestone reached. Until then its state is **Waiting**.
In words only	The first step on the contract day. The later ones have **No date** until an admin gives them one.

A project with no payment plan gets one instalment: the whole price, on the contract day.

Before the contract there is no schedule yet. A deposit recorded at that point pays the first instalments once the schedule is made.

A sale signed before buyer payments existed in the CRM has no schedule. Open it and click **Make from the payment plan**. The overview counts these sales for you: "Signed sales without a schedule: 3. Open each one to make it from the payment plan."

Open a sale

Open a sale from the table, or click **Payments** on its unit on the building board. The top shows **Paid**, **Still to pay**, how many days late, and the **Next payment**.

The **Schedule** lists each **Instalment**, when it **Falls due**, its **Amount**, what is **Paid** and its **State**:

State	Meaning
Paid	Paid in full.
Part paid	Some of it is paid.
Late	Its day has passed and it isn't fully paid. It shows the days late.
Due today	It falls due today.
Upcoming	It falls due later.
Waiting	It waits for a construction milestone.
No date	Nobody has dated it yet.

Record a payment

1. Open the sale and click **Record payment**. The dialog is **Record a payment**.
2. Fill in the fields:

Field	What to enter
Amount	What the buyer paid, as on your bank statement or receipt.
Date paid	The day it was paid. Not in the future.
Method	**Bank transfer** (the default), **Cash**, **Card**, **Cheque** or **Other**.
Reference	The bank's reference, if any.
Note	Anything your team should know.
Add receipt	A photo or PDF, up to 10 MB. Kept private.

3. Click **Record**. You see "Payment recorded."

A payment pays the earliest instalments first. A payment larger than one instalment carries on to the next.

The **Payments** list shows each entry with its **Date paid**, **Entry** (Payment, Refund or Reversal), **Amount** and **Method**, and a **Receipt** link when there is one.

Record a refund

For money you give back to the buyer, click **Record payment** and switch to **Refund**. A refund can't be more than the buyer has paid. On a cancelled sale, only refunds can be recorded.

Reverse a payment entered by mistake

1. Click **Reverse** on the payment.
2. Write **Why**. It is required.
3. Confirm. You see "Reversed."

The payment stays on the record, marked **Reversed**, with the reversal next to it, so the books always show what happened. A payment can be reversed once, and a reversal can't be reversed: record the payment again instead. If a refund was recorded after the payment, reverse the refund first.

Change a schedule

When a buyer agrees different terms, an admin can change their schedule.

1. Open the sale and click **Change schedule**.
2. Change the lines. Each has an **Instalment** name, an **Amount**, and **Falls due**: **At the contract**, **On a date**, **At a milestone** or **Not set yet**, with its **Date** or **Milestone**.
3. Use **Add instalment** and **Remove instalment** as needed. The line at the bottom says whether it "Adds up to the price", or how much it is short or over.
4. Save.

A schedule has 1 to 60 instalments, each more than 0 with at most two decimals, and they must add up to the sale's price. Payments already made pay the first instalments first. The old schedule stays in the history.

Construction milestones

A milestone is a point in the build, such as "Structure complete", that instalments can wait for. Marking it reached makes those instalments due for every buyer at once.

1. Under **Construction milestones**, click **Add milestone**.
2. Fill in the **Name** and, if you know it, the **Planned date**. The forecast uses the planned date until the milestone is reached.
3. Save.

To use a milestone, choose **At a milestone** on a step of the payment plan, or on a line of a buyer's schedule.

When the build gets there:

1. Click **Mark reached** on the milestone.
2. Read the preview: how many instalments fall due, for how many buyers, and how much is still to pay on them.
3. Set **Reached on**: today, or an earlier day.
4. Confirm.

> **Important:** marking a milestone reached can't be undone. The waiting instalments become due on that day, and late after it.

A project can have up to 50 milestones. A milestone can be removed only while nothing uses it and it hasn't been reached.

Payment reminders

Turn on **Email buyers about their payments** to have the CRM email buyers, in your agency's name, a week before each instalment, on the day, and a week and a month late. It is off by default.

The reminders go out each morning. A buyer who is already late gets only the latest reminder, not every earlier one. They are never sent for an instalment that fell due before its schedule was made or before you turned the reminders on.

Whether the switch is on or off, the sale's agent is told in the CRM from the day an instalment falls due, for example "Mirela Gjoka · Rezidenca Liqeni A-405: At the frame is 7 days late". For a partner's sale, your admins are told instead.

When a buyer with a phone number is late, the sale has **Remind on WhatsApp**. It opens WhatsApp with a polite message already written, naming the project, the unit, the amount and the date, for the agent to send.

Export for your accountant

Admins have two buttons at the top of the tab:

- **Export instalments**: one row per instalment;
- **Export payments**: one row per payment, refund and reversal.

Both download a CSV file named after the project and the day, ready for your accountant's spreadsheet.

History

Each sale keeps a history of everything that happened to its payments: “Schedule made”, “Schedule changed”, “Payment recorded”, “Refund recorded”, “Payment reversed”, “Milestone reached” and “Reminder sent”.

An example

EXAMPLE

Rezidenca Liqeni’s payment plan is 30% on signing, 50% at the frame and 20% at handover. Ilir first adds two milestones under **Buyer payments → Construction milestones**: “Frame complete”, planned for 31 March 2027, and “Handover”, planned for 30 June 2028. Then, on the **Payment plan** tab, he sets the steps’ **Falls due**: **At the contract**, **At a milestone** “Frame complete”, and **At a milestone** “Handover”.

On 16 November 2026 the contract for A-302 is signed at €165,000. The Memas’ schedule is made at once: €49,500.00 due that day, then €82,500.00 and €33,000.00 **Waiting**. In **Expected by month**, the €82,500.00 is counted in March 2027, in the line “plus … if milestones keep to plan”.

The Memas pay €49,500 by bank transfer on 20 November. Ilir clicks **Record payment**, enters the amount, the date and the bank’s reference, adds the receipt PDF and clicks **Record**. The first instalment turns **Paid**.

On 2 April 2027 the site engineer confirms the frame is up. Ilir clicks **Mark reached** on “Frame complete”. The preview shows the instalments of every signed buyer that now fall due, with the total. He confirms. The Memas’ €82,500.00 is now due, dated 2 April, and turns **Late** if it isn’t paid. Besnik, the agent of the sale, is told in the CRM.

Lender room

A read-only link that shows your bank how a project sells and collects, in totals only, with expiry, revoking and a count of openings.

Banks that lend on a construction want to follow how the project sells and how much buyers have paid. The lender room gives them a link to a read-only page with exactly that: units sold, money signed, collected and late, what is expected each month, and the construction milestones. It shows totals only, never a buyer’s name or details. The bank needs no account.

Each link expires, you can revoke it at any time, and the CRM counts each time it is opened.

The lender room is for admins, on the web. Agents don’t see it.

Make a link

1. Open the project and click the **Buyer payments** tab.
2. Scroll to the **Lender room** card at the bottom and click **New lender link**.
3. Fill in:

Field	What to enter
For	Who the link is for, such as the bank's name. Required.
Works for	30, 90 (the default), 180 or 365 days.

4. Click **Create link**.
5. Click **Copy link**. You see "Link copied." Then click **Close**.
6. Send the link to the bank yourself, by email or however you usually reach them.

> **Important:** the link is shown only once. SADE doesn't keep a copy it can show you again, so copy it before you close the dialog. If it is lost, revoke it and make a new one.

Anyone who has the link can see the totals until it expires or you revoke it, so send it only to the people at the bank who need it.

What the bank sees

The page is headed **Lender view**, with the project's name, the developer, the status and the month of the keys, and the line "Figures as of" the date. "Totals only: no buyer's details are shown."

Section	What it shows
Sales	**Share sold** (the sold units out of all units), with the number of units in all, and the units **Sold**, **Reserved** (units on hold included) and **Available**.
Collections	For each currency: **Signed value**, **Collected** and its share of what is due so far, **Still to pay**, **Late**, **Late money by age**, and **Expected by month**.
Construction milestones	Each milestone with its planned date, or the date it was reached.

The figures are the same as on your Buyer payments tab, at the moment the page is opened. The footer says the page is shared by you through SADE CRM, from the payments you record, that it isn't an accounting statement, and until when the link works.

See and manage your links

The **Lender room** card lists every link:

Column	What it shows
For	Who the link is for.
Works until	The day it expires, or a **Revoked** or **Expired** chip.
Opened	How many times the link has been opened, and “last” with the date of the latest opening.

The CRM shows only the count and the last date, not a list of every opening.

Revoke a link

1. Click **Revoke** on the link.
2. Confirm. You see “Link revoked.”

The link stops working at once. You can make a new one at any time.

When a link stops working

An expired link, a revoked link, a link that was never valid, and the link of a project whose agency’s plan no longer includes projects all show the same page: “This link no longer works. It may have expired or been revoked. Ask the developer for a new one.” The bank learns nothing else from it.

Limits

- A project can have up to 20 live links at once: “A project has at most 20 live lender links. Revoke one first.”
- A link works for 30 to 365 days, chosen when you make it. To extend a link, make a new one.

An example

EXAMPLE

Ndërtimi Arbëria finances Rezidenca Liqeni with a construction loan, and the bank's credit officer asks for a monthly update on sales. Ilir Dervishi opens **Buyer payments → Lender room → New lender link**, types the bank's name in **For**, keeps **Works for** at 90 days, and clicks **Create link**. He clicks **Copy link** and emails it to the credit officer.

The officer opens it the same afternoon. She sees a share sold of 33.3%, 25 of the 75 units, with 15 more reserved, then the signed value, what has been collected and what is late, and that "Frame complete" is planned for March 2027. She sees no buyer's name.

A week later the **Opened** column shows 3, with the last opening that morning. In February the bank changes its credit officer, so Ilir clicks **Revoke** on the old link and makes a new one for the new officer.

CHAPTER 7

The mobile app

The mobile app

What the SADE CRM phone app does, what stays on the web, push notifications, adding a listing with the camera, and Listings to confirm.

SADE CRM has a phone app for agents and agency admins, for iPhone and Android. It works on the same data as the web CRM: a lead you claim on the phone, a viewing you book or a listing you add there shows on the web at once, and the other way round. It is made for the day out of the office: answering new leads, checking the calendar, recording how a viewing went, and photographing a new listing on the spot.

The app is not in the app stores yet. SADE sends your agency the download link. Ask SADE if you haven't received it.

Signing in

Sign in with the **Username** and **Password** you use on the web CRM. **Keep me signed in** is ticked by default, so you stay signed in after closing the app. **Forgot password?** sends a reset link to your email; you finish the reset in the browser.

The app speaks the same 11 languages as the web CRM. Change the language on the sign-in screen, or from the language row on the **More** screen.

To sign out, open **More** and tap **Sign out**. Signing out also stops push notifications to that phone.

Finding your way around

The bar at the bottom has five icons:

Icon	Tab	What it holds
Grid	**Home**	Your figures, the coming week's viewings and quick actions.
House	**Properties**	Your listings as a list or on a map, and adding a listing.
Inbox tray	**Leads**	New leads: offered to you, waiting for you, and the pond.
Calendar	**Calendar**	A month grid with the chosen day's viewings.
Person	**More**	Tasks, Listings to confirm, Projects, Clients, Deals, Agents (admins), your profile, language and sign-out.

The bell at the top of each screen opens your notifications, with an unread count.

An agent sees the same things on the phone as on the web: their own leads, the listings assigned to them, their own viewings and deals. An agency admin sees the whole agency.

What the app does

- **Leads.** The **Leads** tab shows leads **Offered to you** with a countdown and a **Claim** button, leads **Waiting for you** with Call, WhatsApp and Email buttons, and the **Pond**. The **Taking new leads** switch tells the CRM whether to send you new leads. See Following up.
- **Logging contact.** When you call, WhatsApp or email a client from the app and come back to it, the app asks "How did it go?": **Reached**, **No answer**, **Left a message** or **Wrong number**. Logging stops the lead's response timer.
- **Tasks**, under **More**: Overdue, Today and Upcoming, with **New task**.
- **Clients**, under **More**: search, a client's properties, deals, viewings and enquiries, and sending a template.
- **Calendar**: book a viewing, reschedule it, change its status, record how it went and ask the client to confirm. See Calendar and viewings.
- **Deals**, under **More**: create a deal, change its status, share the PDF report. See Deals.
- **Properties**: search, filter, see listings on a map, open a listing, add, edit and delete listings. When editing, the status is shown but can't be changed. A rejected listing shows SADE's reason and a **Fix the listing** button; saving it sends it back to SADE: "Saved and sent back to SADE for review."
- **Projects**, under **More**, on a plan with projects: see units by building and floor, hold, reserve and sell units, and book a viewing of a unit. Projects, buildings, prices and floor plans are edited on the web.

What stays on the web

These are on the web CRM only:

- the **Viewing log** and its filters (on the phone, viewings are reached from the calendar);
- **Reports** and every Excel download;
- agency settings: Lead routing, Action plans, editing Templates, Agency, Plan & billing, Verification, SADE access, Imports & feeds and Integrations;
- **Lists**, **Promotions** and **Market prices**;
- creating and editing projects, their buildings, prices and floor plans, and partner projects;
- booking a viewing of a whole project, or choosing a status when you book (phone viewings start as **Pending**);
- moving viewings by drag and drop, and the guided tour;
- adding or editing agents (admins can see the agents and their profiles on the phone);
- video uploads, and choosing the cover photo or the order of photos.

The app has no dark mode.

> **Note:** the app needs an internet connection. It keeps nothing for offline use and queues nothing for later. Without a connection it shows “You’re offline” with a **Try again** button.

Push notifications

After you sign in, the app asks “Get new leads on your phone”. Tap **Turn on**, then allow notifications when your phone asks. If you tap **Not now**, the app asks again after 14 days. You can also allow them later in your phone’s settings.

When notifications are allowed on the phone, the notifications from your CRM bell arrive on it as well: new leads and enquiries, listings about to expire, listings approved by SADE and so on. Tapping one opens the right screen, for example the client a lead is about. While the app is open, new notifications show inside the app and in the bell instead.

On Android, the notifications use a channel called “Leads and activity”, which you can adjust in the phone’s settings. See Notifications.

Adding a listing with the camera

Add a listing from the street, with the phone’s camera and location. Tap the **+** button on the Properties tab, or **Add property** on Home. The “New property” form has six steps.

1. **Basics**: the title, the price and currency, whether the price is the total or per m², a pricing note and the description. In markets with a property code, such as Albania, also the **Cadastral zone**

and **Property number**, or tick “No number yet (new build / off-plan)”.

2. **Location**: the city, the address and zip code, and the pin on the map. Tap **Use my location** to drop the pin where you are standing, or search, tap the map or drag the pin. Empty address fields are filled in from the pin. Here you also pick the **Owner** (a client), and an admin picks the **Assigned agent**.
3. **Details**: sale or rent, bedrooms, bathrooms, floor area, year built, the energy class where your country requires one, the first date it can be shown, and the viewing days.
4. **Type & amenities**: the property type and at least one amenity.
5. **Photos**: tap **Take photo** to use the camera, or **From library** to pick up to 20 photos at a time. The first photo is the cover. A photo SADE can’t take, for example one over 25 MB, isn’t added: the app says “These photos weren’t added” and names each one with the reason.
6. **Review**: check each step, then tap **Create property**.

A new listing needs a pin, an owner and at least one photo. It starts as **Pending** until SADE approves it: “New properties start as Pending until they are approved.” See Review and publishing.

If SADE refuses a photo while saving, for example one over 50 megapixels, the listing is saved without it and the app says “Some photos weren’t saved”, with each photo and the reason. Fix them and add them again with **Edit property**.

> **Important:** the phone keeps no draft. If you close the app halfway, what you entered is lost. The web CRM saves a draft; the phone doesn’t.

The first time, the phone asks to use the camera and your location. If you refused, allow them for SADE CRM in the phone’s settings.

For every field and rule, see Adding a listing.

Listings to confirm

A published listing comes off the marketplace when nobody confirms in time that it is still for sale or rent. **Listings to confirm** gathers the ones that need you. Open **More** → **Listings to confirm**. The number beside it is how many are expiring or expired.

1. Choose **Expiring** (coming off the marketplace in the next 7 days) or **Expired** (already off).
2. Tap **Still available** on a listing to confirm it alone. Or tick several, or tap **Select all**, and tap **Still available** at the bottom.
3. Confirm in the dialog. Expired listings go back on the marketplace at once; expiring ones get a new period.

Only confirm listings that really are still for sale or rent. Editing a listing confirms it too. An agent sees only their own listings here; an admin sees the whole agency’s. See Listing quality.

Example

EXAMPLE

Besnik Leka of Tirana Living Real Estate is at a new flat in Kodra e Diellit at 9:30. He taps **+** on the Properties tab, writes “Apartament 1+1 në Kodrën e Diellit”, €89,000 total, and taps **Use my location** in step 2: the pin drops on the building and the street fills in. He picks the owner, Mirela Shehu, a client he added the day before. In step 5 he takes eight photos with **Take photo**, starting with the living room so it becomes the cover, and taps **Create property**. The listing is **Pending** until SADE approves it.

At 10:12 a new lead is offered to him. He opens the **Leads** tab, taps **Claim** while the countdown is still running, calls from the app, and logs **Reached** when the call ends.

On the way back he opens **More** → **Listings to confirm**. Two of his listings expire this week. He knows both are still for sale, ticks them and taps **Still available**. Both stay on the marketplace for a new period.

CHAPTER 8

Integrations

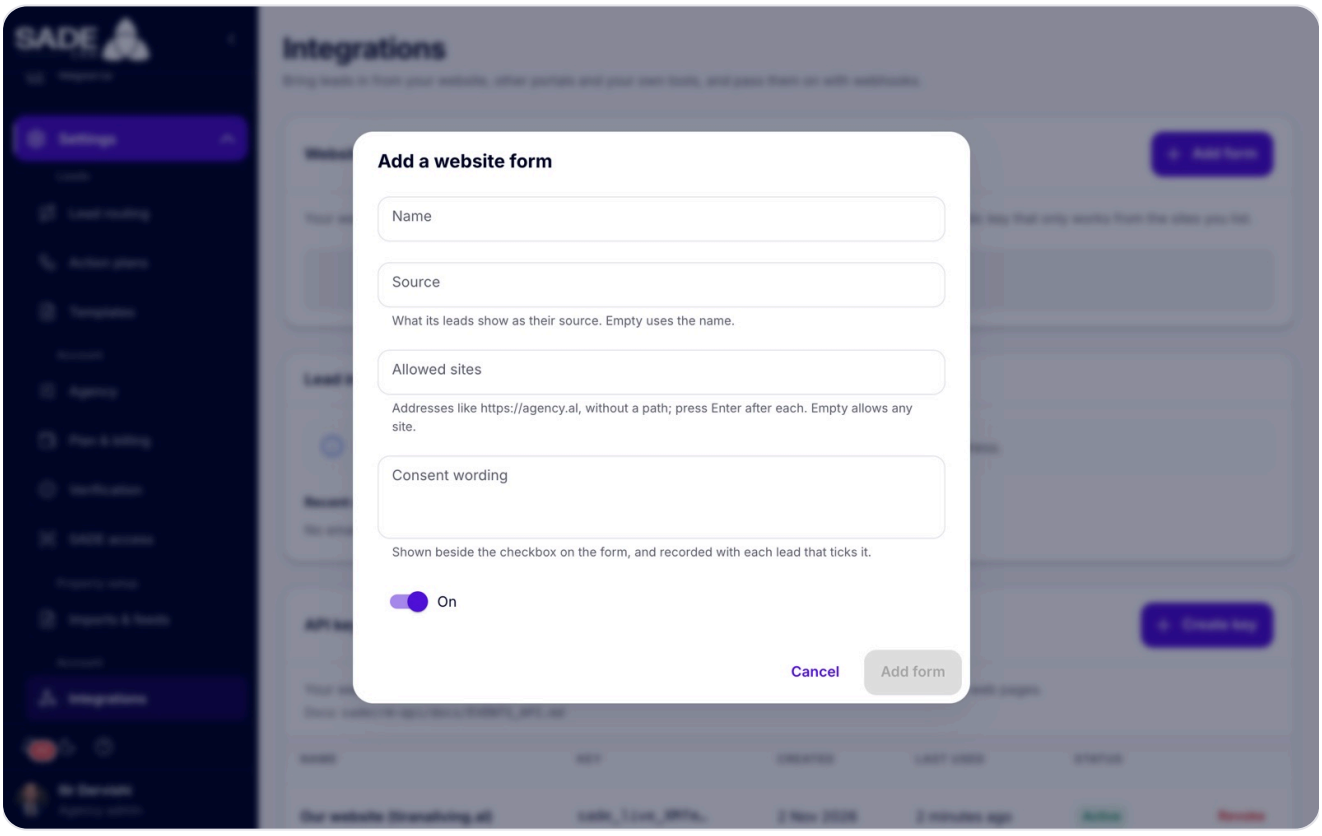
Website forms

Connect the contact form on your agency's own website to SADE CRM, so every enquiry arrives as a lead, with the visitor's consent recorded.

A website form sends each enquiry from the contact form on your own website straight into SADE CRM as a lead. The lead is routed, timed and alerted like a lead from the marketplace. You need no server and no programming: SADE CRM gives you a short piece of code, and whoever looks after your website pastes it where the form should go.

Agency admins set up forms under **Settings** → **Integrations**, in the **Website forms** card. Agents don’t see this page. Integrations are set up on the web CRM only.

Each form has a **public key** that starts with `pk_`. It is not a secret: it can only send enquiries to your agency, and only from the websites you allow.



The “Add a website form” dialog.

Adding a form

1. Open **Settings** → **Integrations**.

2. In **Website forms**, click **Add form**.
3. Fill in the fields below. Leave **On** switched on.
4. Click **Add form**. The form appears in the list with its code showing.
5. Under **Code for your website**, click **Copy code**.
6. Paste the code into your website where the form should be, or send it to whoever edits your website.
7. Send a test enquiry from the live website and check that the lead arrives in Leads.

Field	What to enter
Name	Required. A name you will recognise, such as “Website contact page”. Up to 100 characters.
Source	What the leads from this form show as their source, such as `tiranaliving.al`. If you leave it empty, the name is used. Lead routing rules can match on it.
Allowed sites	The addresses of the websites the form may be used from, like `https://tiranaliving.al`: the start of the address only, with no path after it. Press Enter after each one. If you leave it empty, the form works from any website.
Consent wording	Optional. The sentence shown beside a checkbox on the form, such as “I agree to be contacted about my enquiry.” It is recorded with each lead that ticks the box.
On	Whether the form accepts enquiries.

> **Tip:** a website that opens both with and without `www.` counts as two sites. Add both, for example `https://tiranaliving.al` and `https://www.tiranaliving.al`.

Managing your forms

Each form in the list shows its name, an **On** or **Off** chip, where its leads come from, its **Public key** with a copy button, and either “Only from” the allowed sites or “From any site”.

- Use the switch to turn a form off or on. A form that is off turns away every enquiry until you switch it on again.
- Click the pencil to change the form in **Edit website form**. The public key stays the same, so the code on your website keeps working.
- Click the bin to delete the form. Your website’s form stops sending leads; leads already received stay in the CRM.

You can have as many forms as you need: one for the contact page, one for each listing page template, one for a second website.

The code for your website

This is what the code looks like for a form with consent wording. Always copy your own from **Code for your website**: it holds your form's public key and the full address of SADE's script, which are shortened here.

```
<script src="https://…/forms/v1.js" defer></script>
<form data-sade-form="pk_…" data-sade-success="Thank you! We'll be in touch soon.">
  <input name="name" placeholder="Name" required>
  <input name="email" type="email" placeholder="Email">
  <input name="phone" type="tel" placeholder="Phone">
  <textarea name="message" placeholder="Message"></textarea>
  <!-- optional: the SADE listing it is about -->
  <input type="hidden" name="listing" value="">
  <label><input type="checkbox" name="consent" value="true"> I agree to be contacted about
  <button>Send</button>
</form>
```

The placeholders in your copy are in the language your CRM is set to. Change them to your website's language if they differ.

Notes for your web developer

- Rename, translate and restyle the fields as you like, but keep their `name`s: `name`, `email`, `phone`, `message`, `listing` and `consent`.
- The visitor must give an email or a phone number. The form says "Please add an email or a phone number." otherwise.
- The form's own messages, its two errors and its thank-you ("Thank you, we'll be in touch soon."), follow the page's `lang` attribute (the nearest one around the form, or the one on `<html>`) in any of the CRM's 11 languages, and are in English otherwise.
- `data-sade-success` replaces the thank-you text shown under the form after it is sent. Add `data-sade-error="…"` to replace the error messages with your own text. It replaces all of them with that one text.
- On a listing page, put the listing's SADE id in the hidden `listing` field. The lead then arrives as an enquiry about that listing. The id is the last part of the listing's page address in the CRM. Leave the field empty on a general contact page.
- Several forms on one page work. Each needs its own `data-sade-form`.

- The script adds a hidden field that catches spam robots, and sends the page address with each enquiry. A form sent twice by a double click is recorded once.
- The phone number can be typed without the country code; it is read as a number in your agency's country.

What happens to an enquiry

1. **The person is found or created.** SADE CRM looks for a client with the same email, then the same phone. If there is none, it creates one at the stage **Lead**. It never overwrites details you already have; it only fills in what is missing.
2. **It is recorded as an enquiry.** With a listing id of one of your listings, it is an enquiry about that listing and opens an enquiry on it. Otherwise it is a general enquiry.
3. **It is routed.** If nobody in the agency works with the person yet, your lead routing rules decide who gets it. With no matching rule, a listing enquiry goes to the listing's agent, and anything else goes to the pond. If the person already has an agent, that agent is told they asked again.
4. **The timer starts.** The response timer starts and the agent is alerted, as for any new lead. See Leads.
5. **Consent is recorded.** If the visitor ticked the checkbox, the CRM records their consent to be contacted with your exact wording, on email and on phone and WhatsApp (for what they gave), with the page and the time as proof. See Security and privacy.
6. **The visitor is thanked.** The thank-you text appears under the form, and the form is cleared.

Limits

- Each visitor can send up to 10 enquiries in 10 minutes. More are turned away.
- The message can be up to 4,000 characters. Anything longer is cut.
- The visitor sees only a general error ("That didn't go through. Please try again.") when an enquiry is turned away, whatever the reason.

When enquiries don't arrive

If your website says "That didn't go through. Please try again." or no lead appears, check:

- that the form is **On** in the list;
- that your website's address is under **Allowed sites**, exactly as the browser shows it, including `https://` and, if your website uses it, `www.`;
- that the code on your website has the public key of a form that still exists (a deleted form's key stops working);
- that the visitor gave an email or a phone number that looks valid.

Example

EXAMPLE

Ilir Dervishi, admin of Tirana Living Real Estate, opens **Settings** → **Integrations** and clicks **Add form**. He names it "Website contact page", sets the **Source** to `tiranaliving.al`, adds `https://tiranaliving.al` and `https://www.tiranaliving.al` under **Allowed sites**, and writes the **Consent wording** "Pranoj të më kontaktoni për kërkesën time." He clicks **Add form**, then **Copy code**, and sends the code to the agency's web designer, who pastes it on the Contact page and translates the placeholders into Albanian.

On Saturday evening Ana Hoxha fills in the form on tiranaliving.al: her name, phone 069 123 4567, "Kërkoj një apartament 2+1 në Tiranën e Re", and ticks the box. In the CRM she becomes a new client at the stage **Lead**, with the source `tiranaliving.al` and her phone stored with the +355 code. The agency's rule for website leads offers her to Arta Krasniqi and Besnik Leka, first to claim. Arta claims her and calls on Monday morning. Ana's consent to be contacted by phone and WhatsApp is on her client page, with Ilir's exact sentence.

API keys and webhooks

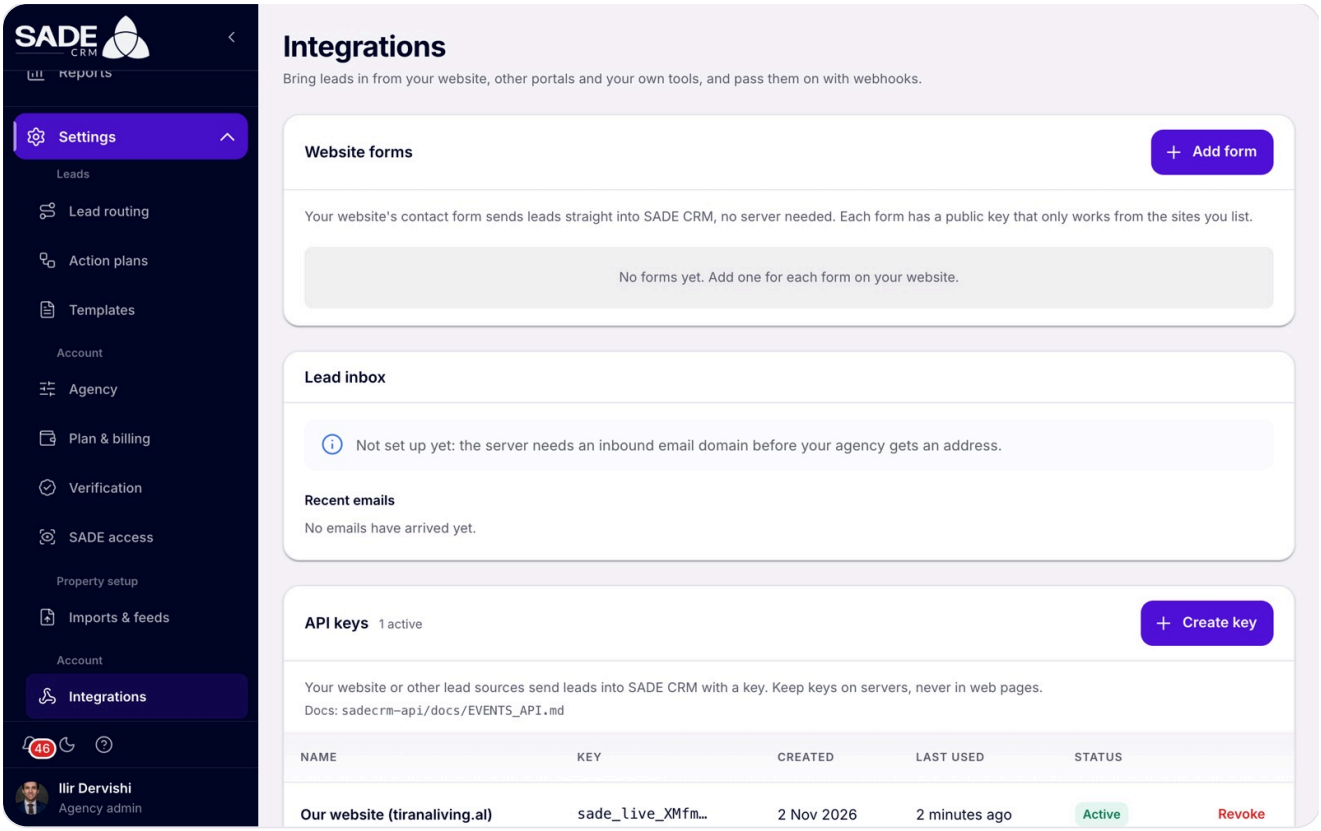
Let your own software send leads into SADE CRM with an API key, and hear about changes to your clients with signed webhooks.

API keys and webhooks connect SADE CRM to the rest of your software. They need a developer, or a tool such as an automation service that can send and receive web requests.

- An **API key** lets a server send leads and activity into your CRM: your website's back end, an advertising tool's lead forms, your own systems.
- A **webhook** is the other direction: SADE CRM calls a web address of yours each time something happens to one of your clients, so your other software can follow along.

Both are set up by an agency admin under **Settings** → **Integrations**, on the web CRM only. The **API keys** card links to this page: **How to set up API keys and webhooks**. For a simple contact form on your website you need neither: use a website form. To let other portals read your listings, see the Kyero and OpenImmo feeds in Imports and feeds.

Give your developer this page. It has everything they need.



Settings → Integrations. The API keys card is lower down, and Webhooks below it.

API keys

Creating a key

1. Open **Settings** → **Integrations** and go to the **API keys** card.
2. Click **Create key**.
3. Give it a **Name** after what will use it, such as “Our website” or “Facebook lead ads”. The name tells you which key to revoke later, and it is the source of the leads sent with the key unless the sender gives another one.
4. Click **Create key**.
5. The **Copy your new key** dialog shows the key once. Click **Copy key**.
6. Click **I’ve copied it**.
7. Give the key to your developer through a safe channel, such as a password manager. Not by plain email or chat.

> **Important:** you won’t see the key again. SADE CRM keeps only a fingerprint of it, so nobody, SADE included, can show it to you later. If it is lost, revoke it and create a new one.

Keeping keys secret

A key starts with `sade_live_`. Anyone who has it can send leads into your CRM.

- Keep keys on servers only. Never put a key in a web page, a phone app or anything a visitor's browser downloads, where anyone can read it.
- Create one key for each website or tool. Then you can turn one off without touching the others.
- If a key may have got out, revoke it and create a new one.

The keys list

The list shows each key's **Name**, the start of the **Key** (for example `sade_live_XMfm…`), when it was **Created**, when it was **Last used** ("Never" if not yet), and its **Status**: **Active** or **Revoked**. Every key can do the same thing: send events into your agency. There are no separate permissions to choose.

Revoking a key

1. Click **Revoke** on the key's row.
2. Confirm with **Revoke key**.

From that moment anything still sending with the key is turned away. Revoking can't be undone; the key stays in the list, greyed, as **Revoked**.

Sending leads with a key

Your developer sends each lead or piece of activity as a `POST` request to the path `/api/v1/events` on SADE's API address. That address is the one in your website form code: the part before `/forms/v1.js` under **Code for your website**. If you have no website form, ask SADE for it.

Send the key in the `Authorization` header. Everything is JSON, and times are in ISO 8601 with a time zone.

```
POST /api/v1/events
Authorization: Bearer sade_live_…
Content-Type: application/json
Idempotency-Key: 7d4c0a3e-2b1f-4c55-9e0a-3f1d2a6b8c90
```

```
{
  "type": "property_inquiry",
  "source": "tiranaliving.al",
  "message": "Is the flat still available? Could I see it on Saturday?",
  "person": {
    "name": "Klea Muka",
    "email": "klea.muka@example.com",
    "phone": "+355 68 412 3377",
    "language": "sq"
  },
  "property": { "id": "c8f933f3-95d8-4d30-8ef5-f925e29aed3d" },
  "consents": [
    {
      "channel": "phone",
      "purpose": "contact",
      "granted": true,
      "wording": "I agree to be contacted about my enquiry.",
      "language": "en"
    }
  ]
}
```

Only `type`, and an `email` or `phone` for the person, are required.

Field	What to send
`type`	What happened. See the event types below.
`source`	Where the person was, in your words. Shown in the CRM as the lead's source. If left out, the key's name is used.
`occurredAt`	When it happened. If left out, now.
`message`	What the person wrote. Up to 4,000 characters.
`person`	`name` (or `firstName` and `lastName`), `email`, `phone` and `language`. A phone without a country code is read as a number in your agency's country.
`property`	The listing it is about. For one of your SADE listings, send `{ "id": "…" }`: the id is the last part of the listing's page address in the CRM. For a listing elsewhere, describe it instead, with fields such as `url`, `city` and `price`; the description is kept with the event.
`project`	A project it is about, as `{ "id": "…", "unitCode": "A-304" }`. `unitCode` is optional.
`page`, `campaign`	Where the person was (`url`, `title`, `referrer`) and how they got there.
`consents`	What the person agreed to. Each one has a `channel` (`email`, `sms`, `whatsapp` or `phone`), a `purpose` (`contact` or `marketing`), `granted` (true or false), and, when granted, the exact `wording` they saw.
`id`	Your own id for the event. The same as the `Idempotency-Key` header.

A key can name only your own listings and projects. Naming another agency's is refused.

Event types

Intent events are someone asking to be contacted. They create the person if you don't have them yet, as a new lead, and route, time and alert it like any lead:

`registration`, `inquiry`, `property_inquiry`, `seller_inquiry`, `general_inquiry`, `incoming_call`, `visited_open_house`.

Behaviour events only add to the timeline of someone you already have. About a person you don't know, they are answered `ignored` and nothing is stored:

`viewed_property`, `saved_property`, `property_search`, `saved_property_search`, `visited_website`, `viewed_page`, `unsubscribed`.

What comes back

```
{
  "status": "created",
  "eventId": "f1397256-2319-4810-a32b-4966c61777a9",
  "personId": "ccb5e979-4b32-4283-997f-74cd01cc3675",
  "inquiryId": "1b4a29af-d287-48d0-9399-32e75c3528de"
}
```

Answer	`status`	Meaning
201	`created`	A new person was created.
200	`updated`	The event was added to a person you already had.
200	`duplicate`	This id was already sent with this key. Nothing new is recorded, and the first answer's ids come back.
200	`ignored`	A behaviour event about someone you don't know.
401		The key is missing, unknown or revoked.
422		Something in the event is wrong. `message` says what.
429		Too many requests. Wait the number of seconds in the `Retry-After` header.

`inquiryId` is `null` when the event opened no enquiry on a listing.

Rules for senders

- **Send each event once, safely.** Give every event an id, in the `Idempotency-Key` header or as `id`, and send the same id when you retry. The CRM records it once.
- **Rate limit.** Each key may send 60 events a minute.
- **One person, many events.** People are matched within your agency by email, then by phone, whatever way the number is written. An event never overwrites what you already have; it only fills in what is missing.
- Leads sent with a key are routed, timed and alerted like leads from the marketplace, and fire your webhooks.

Webhooks

Adding a webhook

1. Open **Settings** → **Integrations** and go to the **Webhooks** card.

2. Click **Add webhook**.
3. Enter the **URL** where SADE CRM should send the requests. It must start with `https://`.
4. Under **Send when**, tick **Anything happens, including events added later**, or tick the events you want.
5. Click **Add webhook**.
6. On the webhook's row, click **Show secret**, then **Copy secret**. Give the URL and the secret to your developer.
7. Click **Send test** and read the result.

The URL must be a public `https://` address on the internet, up to 2,048 characters. Addresses without `https://`, private network addresses and addresses with a user name or password in them are refused.

Events

Tick box	Event	Sent when
A client is added	`person.created`	A client is created, by a lead or by hand in the CRM.
A client's details change	`person.updated`	Their name, email, phone, address or city changes.
A client's stage changes	`person.stage_changed`	Their lead stage changes. `change` holds `from` and `to`.
A client is assigned to an agent	`person.assigned`	They are given to another agent, including when an agent claims a lead. `change` holds the `from` and `to` user ids.
A duplicate is merged into a client	`person.merged`	An admin merges a duplicate into them. `mergedId` is the record that no longer exists.
Activity is recorded for a client (website, marketplace)	`event.created`	Any lead or activity is recorded for them, from the marketplace, a website form or an API key.
A note is written	`note.created`	An agent writes a note about them.

The row shows the events a webhook listens for, or **All events**.

What a delivery looks like

Each delivery is a `POST` with a JSON body like this one, for a stage change:

```
{
  "id": "5a0e6c1e-8a4f-4f5b-9d43-1c2b7e9f0a11",
  "event": "person.stage_changed",
  "companyId": "3f7a1c28-6d0b-4f8e-a1c2-9b7d5e4f3a20",
  "createdAt": "2026-11-05T14:54:12Z",
  "data": {
    "person": {
      "id": "ccb5e979-4b32-4283-997f-74cd01cc3675",
      "companyId": "3f7a1c28-6d0b-4f8e-a1c2-9b7d5e4f3a20",
      "name": "Klea Muka",
      "email": "klea.muka@example.com",
      "phone": "+355684123377",
      "stage": "spoke_with_customer",
      "assignedAgentId": "8d2e4b61-0c3a-4f7e-b5d9-2a1c6e8f4b03",
      "source": "tiranaliving.al",
      "createdAt": "2026-11-05T14:41:07Z",
      "lastActivityAt": "2026-11-05T14:53:58Z"
    },
    "change": { "from": "lead", "to": "spoke_with_customer" }
  }
}
```

- `data.person` is in every `person.*` event. Fields with no value are left out.
- `event.created` sends `data.event` (the type, source, message, listing and so on) and `data.person`.
- `note.created` sends the note in `data`: its `id`, `personId`, `text`, `authorUserId` and `createdAt`.
- Stages are sent by their keys: `lead`, `attempted_contact`, `spoke_with_customer`, `appointment_set`, `met_with_customer`, `showing_homes`, `listing_agreement`, `active_listing`, `submitting_offers`, `under_contract`, `closed`, `nurture` and `trash`.
- Times are in UTC.

The request carries these headers:

```
X-Sade-Event: person.stage_changed
X-Sade-Delivery: 5a0e6c1e-8a4f-4f5b-9d43-1c2b7e9f0a11
X-Sade-Signature: t=1793890452,v1=9f3c…
User-Agent: SadeCRM-Webhooks/1.0
```

`X-Sade-Delivery` is the same as `id`. Deliveries can arrive more than once and out of order: use `X-Sade-Delivery` to drop repeats, and `createdAt` to put them in order.

Checking the signature

Every delivery is signed with the webhook's secret, which starts with `whsec_`. Check the signature before trusting a delivery:

1. Read `t` (a time in Unix seconds) and `v1` from the `X-Sade-Signature` header.
2. Compute HMAC-SHA256 of the text `{t}.{raw body}` (the time, a full stop, then the body exactly as received), with the secret as the key, written as lower-case hexadecimal.
3. Compare it with `v1`, in constant time.
4. Reject the delivery if `t` is more than five minutes old.

In Node.js:

```
import crypto from "node:crypto";

function isFromSade(rawBody, header, secret) {
  const { t, v1 } = Object.fromEntries(header.split(",").map((p) => p.split("=")));
  const expected = crypto.createHmac("sha256", secret).update(`${t}.${rawBody}`).digest("h
  const fresh = Math.abs(Date.now() / 1000 - Number(t)) < 300;
  return fresh && v1?.length === expected.length &&
    crypto.timingSafeEqual(Buffer.from(expected), Buffer.from(v1));
}
```

The secret can be shown again at any time with **Show secret**. There is no button to change it: to get a new secret, delete the webhook and add it again, which also removes its delivery history.

Answering, retries and switching off

- Answer with any `2xx` status within 10 seconds. Anything else counts as a failure, and so does a redirect: redirects are not followed.
- A failed delivery is tried again with growing gaps, up to 9 attempts over about an hour and a half.
- After 50 failed attempts in a row (each retry counts as one), the webhook switches itself **Off** and the card says why: "Switched off after 50 failed deliveries in a row. Last error: …". Fix the receiver, then switch the webhook back on. Switching it on starts the count again.
- While a webhook is off, nothing is sent to it.

Testing and the delivery log

Send test sends a `ping` event at once, with `data.message` "A test from SADE CRM.", even while the webhook is off. The card shows "Test delivered. Your server answered 200." or why it failed. Test pings are not listed in the log and don't count as failures.

Recent deliveries opens the last 50 deliveries, newest first, with the **Event**, **Status** (**Delivered**, **Failed** or **Pending**), the number of **Attempts**, the **Response** your server gave, and when it was **Created**. Click **Refresh** to update it.

Changing, pausing and deleting

- The **On** / **Off** switch pauses a webhook without losing anything.
- The pencil opens **Edit webhook** to change the URL or the events.
- The bin deletes the webhook. Nothing more is sent to it, and its delivery history is removed.

Example

EXAMPLE

Tirana Living Real Estate has its own website, tiranaliving.al, with a viewing request form on each listing page, built by its web designer. Ilir Dervishi creates an API key named “Our website (tiranaliving.al)” and gives it to the designer through the agency’s password manager. The website’s server now sends each request as a `property_inquiry` with the listing’s id and the visitor’s consent. When Klea Muka asks about “Apartament 2+1 në Bllok” at 15:41, she arrives as a new lead with the source `tiranaliving.al`, the same source as the agency’s website form. The routing rule for that source offers her to Arta Krasniqi and Besnik Leka, and Arta claims her.

The agency also keeps its accounts in a separate system and wants to know when a client reaches **Closed**. Ilir clicks **Add webhook**, enters `https://hooks.tiranaliving.al/sade`, ticks **A client’s stage changes**, and clicks **Add webhook**. He copies the secret for the designer and clicks **Send test**: “Test delivered. Your server answered 200.”

When Arta moves Klea to **Spoke with Customer** at 15:54, the accounts system receives `person.stage_changed` with `"from": "lead"` and `"to": "spoke_with_customer"`, checks the signature, and ignores it, because it acts only on `"to": "closed"`.

CHAPTER 9

Enterprise

Organizations

The Enterprise tier, for groups that run several agencies on one contract. It covers the organization's workspace, its agencies, reports, people and settings, and what an agency inside an organization sees.

An **organization** sits above several agencies: a franchise network, or a group with branches, possibly in more than one country. It has one contract with SADE that covers all its agencies, and its own admins, called **Organization admins**, who belong to no single agency.

Organization admins work in their own workspace. They see every agency’s numbers side by side, create agencies and invite their admins, and, if the contract allows it, open any agency’s CRM to work in it.

The first half of this page is for organization admins. The last section is for agencies inside an organization.

How an organization starts

Organizations are the Enterprise tier, sold by SADE. You can’t sign up for one online.

1. SADE creates the organization and sets its contract and access policy.
2. SADE invites the first organization admin. They get an email with a link to set their own password. The link works for one day, and SADE can send it again.
3. The admin signs in at crm.sadegre.com and lands in the organization’s workspace.

Nobody types a password for anyone else: every person an organization invites sets their own from the email.

If your group already has agencies in SADE CRM, SADE moves them into the organization for you.

The contract

The contract is set by SADE. You see it on the **Organization** settings page.

Part	What it means
Agencies, **Agents**, **Listings**	The most the organization can have, counted across all its agencies. A limit can also be “no limit”.
End date	When the contract ends, or “Renewed by SADE; no end date.”
Status	**Active**, **Ended**, **Cancelled** or **Inactive**.

The contract is paid by invoice or bank transfer, outside the CRM. Agencies in an organization have no plan of their own to pay for, and they always have projects.

If the contract ends or is cancelled, the organization’s admins and everyone in its agencies can’t sign in until SADE restores it. Nothing is deleted.

To change the contract, click **Write to SADE** on the contract card, or write to support@sadecrm.com.

Access policy

The access policy decides what organization admins may do inside the agencies. SADE sets it with you, as part of the contract.

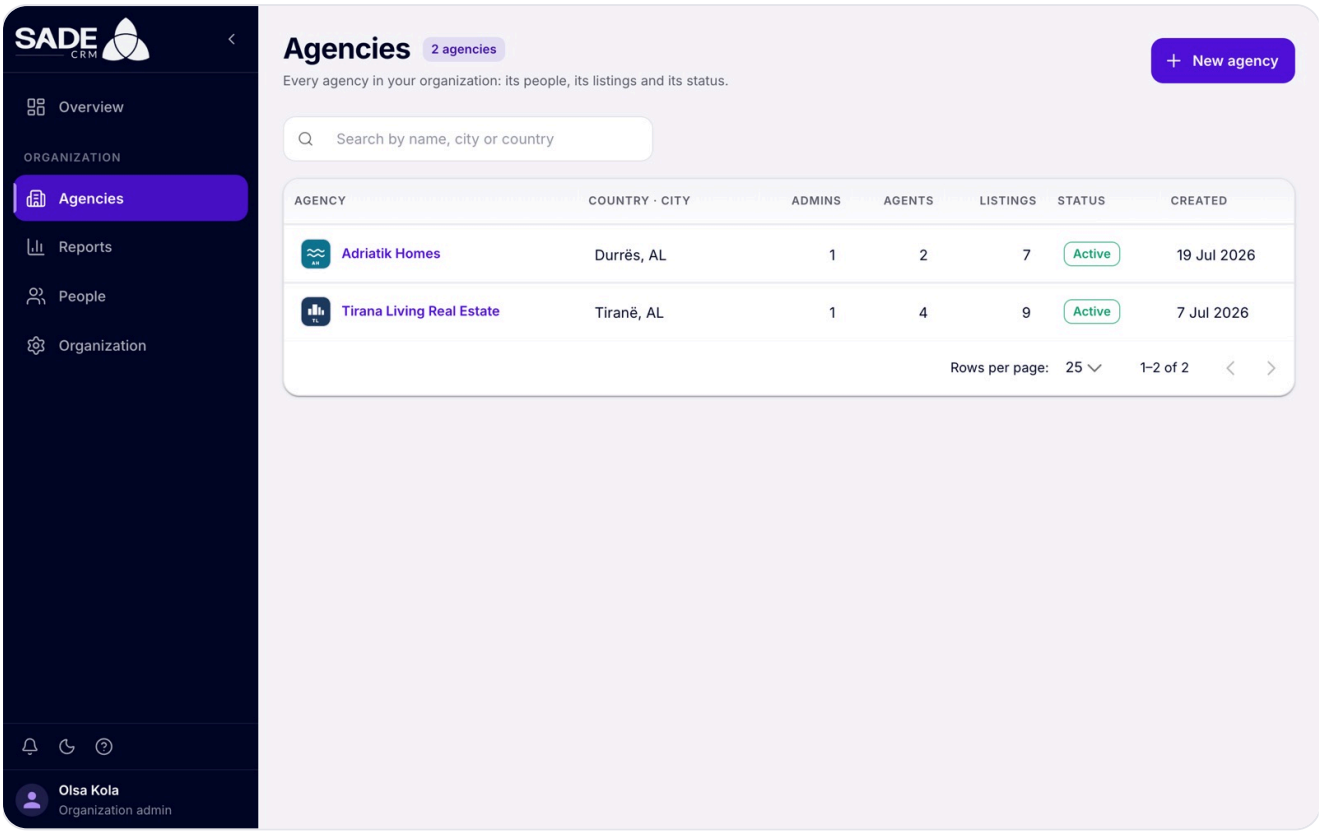
Policy	What your admins can do
Full access	“Your admins can open any of your agencies and work in its CRM as its admin.”
Read-only	“Your admins can open any of your agencies and look, but change nothing.”
Reports only	“Your admins see every agency’s numbers, agencies and accounts, but never open an agency’s CRM.”

Your workspace

The menu of an organization admin has **Overview**, and under **Organization**: **Agencies**, **Reports**, **People** and **Organization**.

Overview shows your agencies side by side for the last 7, 30 or 90 days: agencies, agents, live listings, leads and how many were answered, viewings and deals won. The table **Your agencies** has one row per agency with its median response time and the value of its deals. Values are converted into your reporting currency at the day’s rates.

Agencies



Every agency in the organization, with its admins, agents, listings and status.

Create an agency

1. On **Agencies**, click **New agency**.
2. Fill in the agency's details: **Name**, **Kind** (**Agency** or **Developer**), **Country**, **City**, **Email**, **Phone**, **Website**, **Address**, **Language** and **Currency**. The country can't be changed later.
3. To give the agency its first admin now, tick **Invite an admin now** and enter their **Full name**, **Email** and **Phone**. You can also add admins later.
4. Click **Create agency**.

The new agency starts verified through your organization, so it doesn't send documents to SADE, and it runs on your contract. Its admin gets an email to set their password. If your contract's agency limit is reached, the CRM says "Ask SADE to raise it."

An agency's page

Click an agency's name to open its page:

- **Details**: country, city, contacts, language, currency and time zone. **Edit details** changes everything except the country and kind.
- The number of admins, agents and listings.
- **Open CRM**, to work inside the agency (see below).

- **Status**, with **Deactivate** or **Activate**. A deactivated agency can't sign in and its listings leave the marketplace until you activate it again. Its data stays.
- **Admins**: the agency's admins. **Add admin** invites one by email. **Send the invitation again** resends the email to someone who hasn't set their password.
- **Who opened this agency**: every time someone from your organization opened its CRM.

The agency's own admin adds its agents, as in any agency. See Team and roles. Every agency's agents and listings count towards your contract's totals.

Working inside an agency

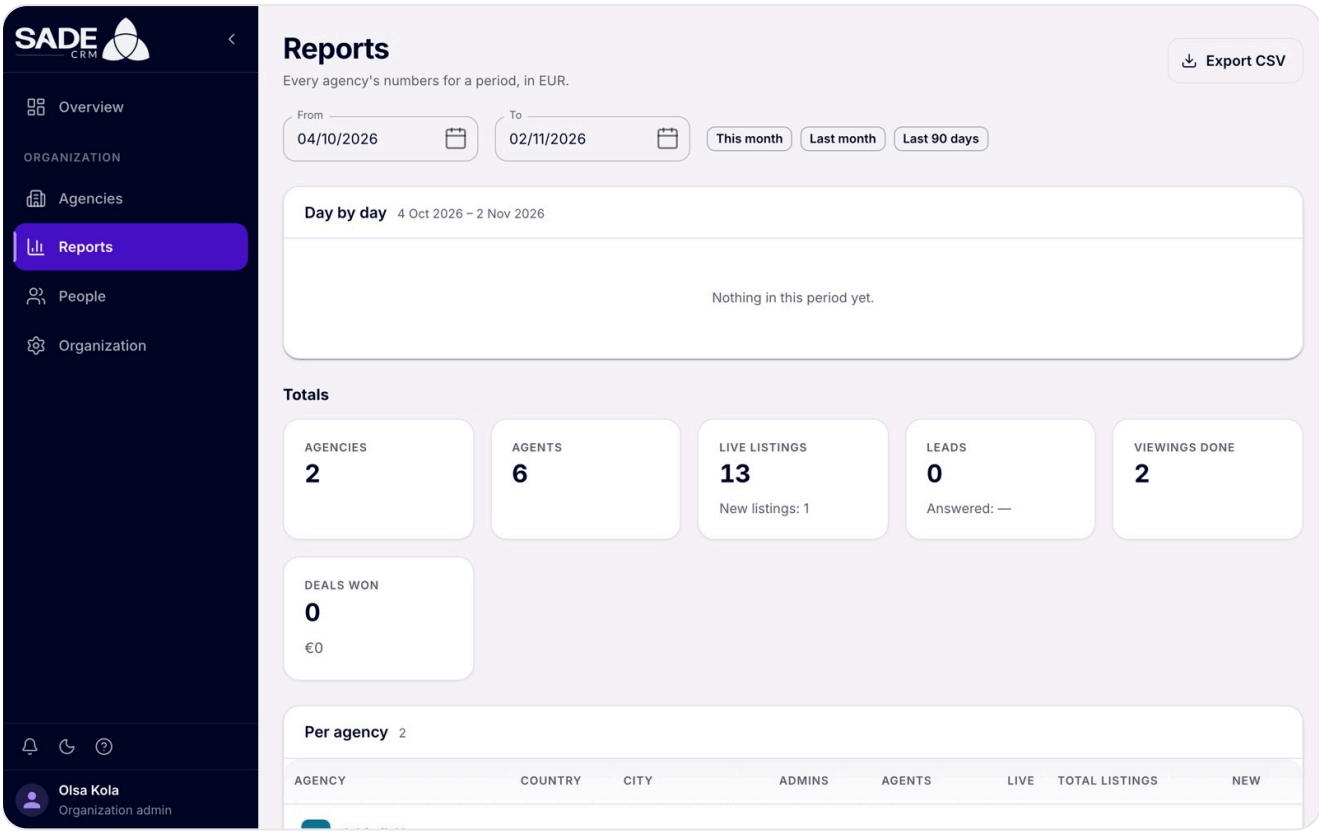
With **Full access** or **Read-only**, you can open an agency's CRM:

1. On the agency's page, click **Open CRM**.
2. The CRM switches to that agency, and you see it as its admin does. A banner at the top says "You're working in" and the agency's name, until what time, and "read-only" if your policy is Read-only.
3. When you are done, click **Back to the organization**.

Rule	Detail
How long	Up to 12 hours. Opening another agency ends the previous one.
Read-only	With a Read-only policy, any change is refused: "This agency's CRM is open to you read-only. Changes are made by the agency."
Logged	Every opening is logged, with how many requests and changes were made. The agency sees each opening on its **SADE access** page, and you see them on **People**, under **Access log**.

With **Reports only**, there is no **Open CRM**: "Your organization's agreement with SADE doesn't include opening an agency's CRM: you see its numbers only."

Reports



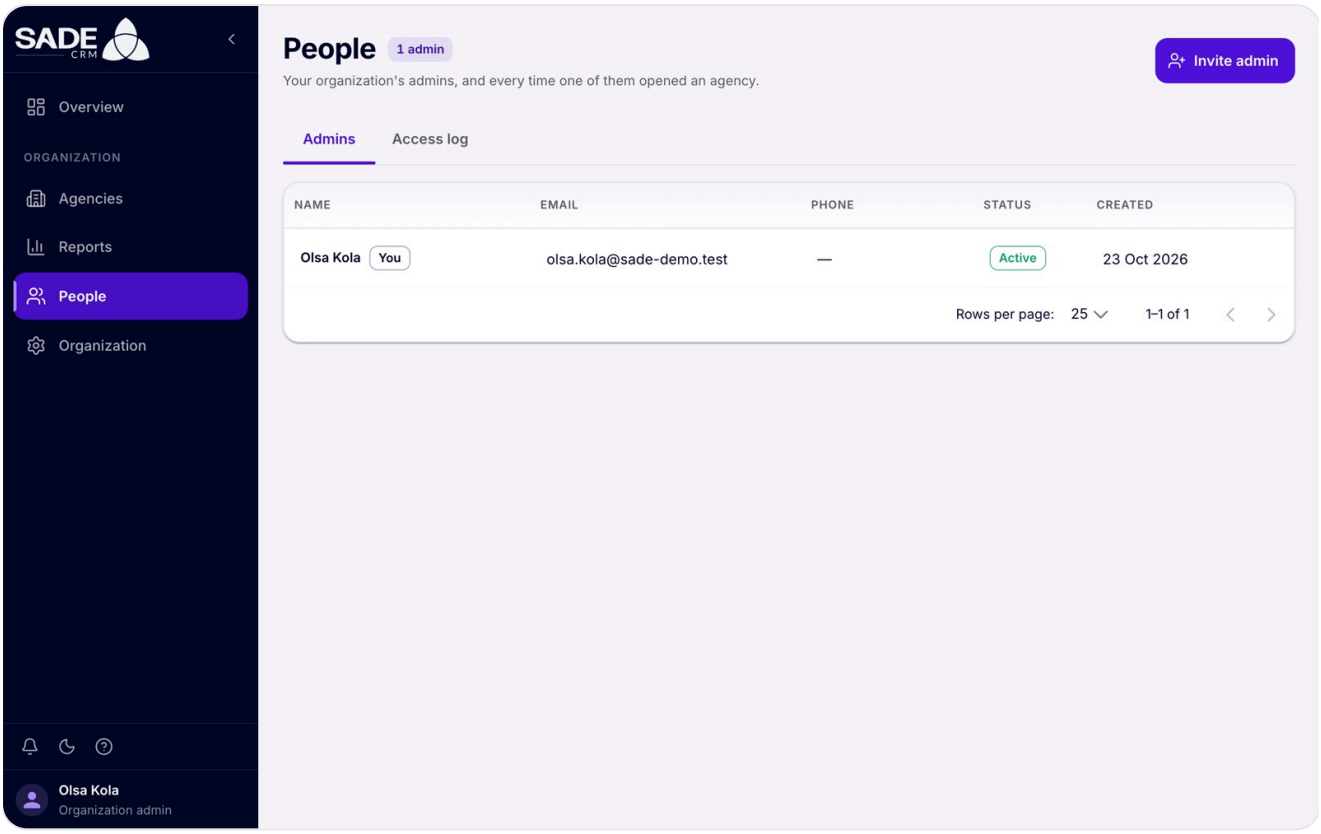
Reports for any period, in the organization's reporting currency.

Reports shows every agency's numbers for a period you choose with **From** and **To**, or with **This month**, **Last month** or **Last 90 days**. A period can be up to 400 days.

- **Day by day**: leads and deals won over the period.
- **Totals**: agencies, agents, live and new listings, leads and the share answered, viewings done and deals won.
- **Per agency**: one row per agency, with its listings, leads, how many were contacted and how many in time, its median response in minutes, unclaimed leads, viewings, deals won and their value, and open deals. "In time" uses each agency's own response target.

Click **Export CSV** to download the figures.

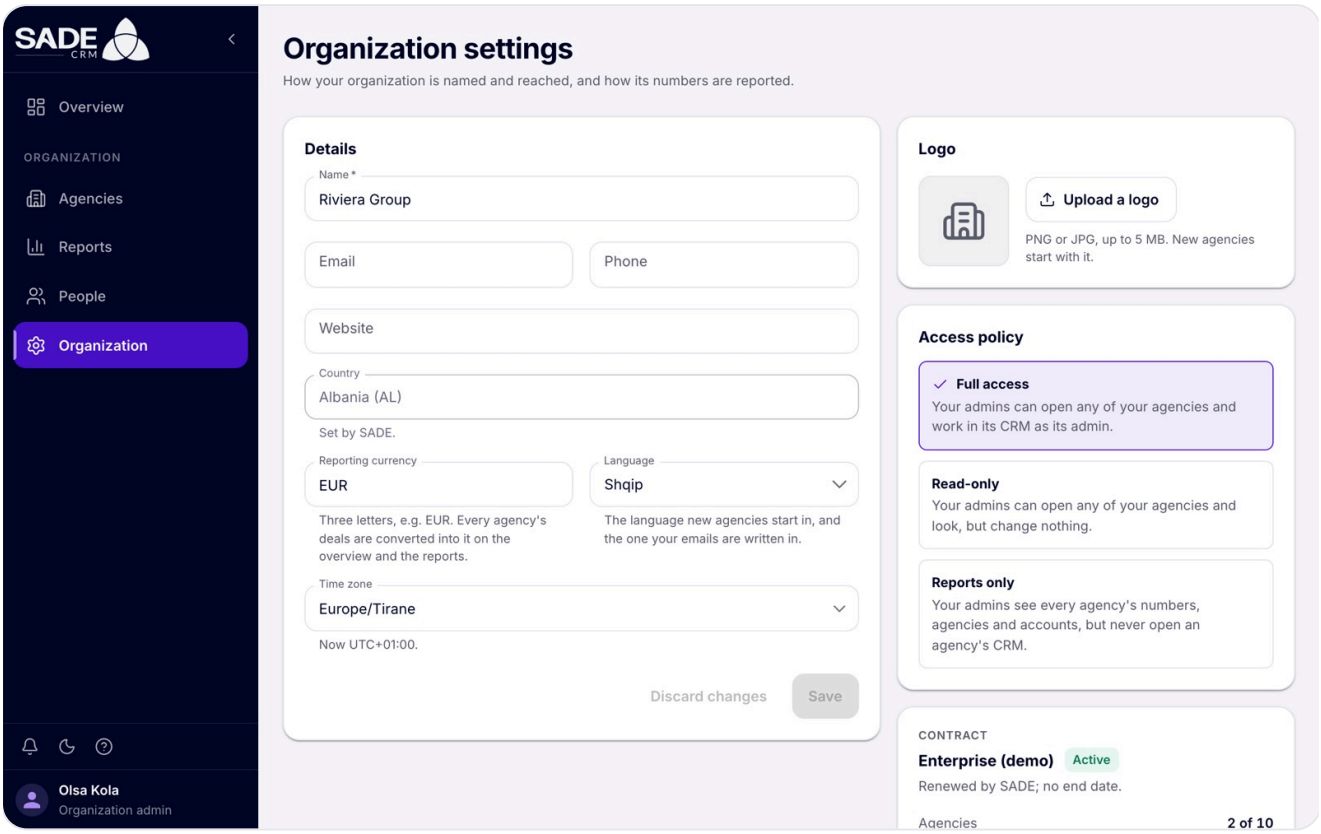
People



People lists your organization's admins.

- Click **Invite admin** to add one. "They get the same workspace as you: every agency, its numbers and its accounts. They set their own password from the email."
- **Deactivate** stops another admin from signing in until you **Activate** them again. You can't deactivate yourself.
- The **Access log** tab lists every time an organization admin opened an agency: **Who**, **Agency**, **When**, **Ended**, **Requests** and **Changes**.

Organization settings



Open **Organization** in the menu.

Field	What it does
Name, **Email**, **Phone**, **Website**	How your organization is named and reached.
Country	Set by SADE.
Reporting currency	Every agency’s deals are converted into it on the overview and the reports.
Language	The language new agencies start in, and the one your emails are written in.
Time zone	Your organization’s time zone.
Logo	PNG or JPG, up to 5 MB. New agencies start with it.

The **Access policy** card shows your policy, and the contract card shows your limits and how much of each you use. Both are set by SADE.

For agencies inside an organization

If your agency belongs to an organization, it works like any other agency, with these differences:

- **Billing**: **Plan & billing** says “Billing is handled by” the organization. There is no plan to choose or pay for. See Plans and billing.
- **Limits**: your agents and listings count towards the organization’s contract.
- **Projects**: your agency always has them.
- **Verification**: an agency the organization created starts verified.
- **Who can look in**: depending on the policy, the organization’s admins can work in your CRM as your own admins do, look without changing anything, or see only your numbers. Your **SADE access** page shows a card “Part of” the organization with its policy, and the log “Openings by” the organization. See Agency settings.
- **Admins**: the organization’s admins can add admins to your agency.

On the phone app

Organization admins can use the SADE CRM phone app too. It opens on the organization’s workspace, with **Overview**, **Agencies**, **Reports**, **People** and **More**. Agencies can be created and edited there, and **Open CRM** opens an agency; a thin bar shows which agency you are working in, and **Switch** takes you back. See The mobile app.

EXAMPLE

Riviera Group runs two agencies in Albania: Adriatik Homes in Durrës and Tirana Living Real Estate in Tirana. Its contract allows 10 agencies, and its policy is **Full access**. Olsa Kola is its organization admin.

On Monday Olsa opens **Reports**, clicks **Last month** and compares the two agencies’ answer rates. Tirana Living’s median response is slower, so she clicks **Open CRM** on its page. The banner reads “You’re working in Tirana Living Real Estate”, and she checks the agency’s lead routing as its admin would. Then she clicks **Back to the organization**.

Ilir, Tirana Living’s admin, sees the opening on his **SADE access** page under “Openings by Riviera Group”, with the number of requests and changes Olsa made.

In March the group opens a branch in Vlorë. Olsa clicks **New agency**, enters “Riviera Vlorë”, picks Albania and Vlorë, ticks **Invite an admin now** and adds the branch manager. The branch starts verified and appears on **Agencies** as **Active**, the third of the contract’s 10.

CHAPTER 10

Security and help

Security and privacy

Who can see your agency's data, how SADE's access is limited and logged, what is public, how passwords and sessions work, and what happens to your data.

This page gathers in one place how SADE CRM keeps your agency's data to your agency: who can see what, how SADE and Enterprise organizations get in and how you see that they did, what goes public on the marketplace, and how sign-in is protected.

For SADE's legal commitments, read the privacy policy and the terms of service.

Your agency's data is yours alone

Every agency's data is kept apart from every other agency's: its clients, leads, tasks, templates, lists, listings, projects, documents and payments. One agency never sees another's records.

The one exception is a project sold with partner agencies. If your agency sells another agency's project as a partner, the developer sees only how many clients you have registered for it, until you reserve a unit for one of them. At that moment the buyer's name, phone and email are passed to the developer. See Selling as a partner.

Who can see what

Who	What they see
Agency admin	Everything in their own agency.
Agent	Their own leads, clients, listings, viewings, deals and tasks, and the shared pond. No settings, team or billing. See Team and roles.
Organization admin	Only the agencies in their own organization, and only as far as the organization's access policy allows. Every opening is logged and shown to the agency.
SADE staff	The platform side of your account: your agency's details, your verification documents, and your listings and projects, which they review. Your clients, leads, deals and settings only through a logged, read-only view.

SADE's access to your CRM

SADE's staff don't belong to any agency. To look at your clients, leads, deals, appointments, tasks, settings or billing, they must start a **view as agency**:

- They must give a reason, which you can read.
- The view is read-only: they can't change anything.
- It ends on its own after one hour.
- Every request they make is logged.
- Every agency admin gets a notification "SADE is viewing your CRM" when it starts.

You see every view, with its reason, duration and number of requests, on the **SADE access** page. See Agency settings.

Enterprise organizations

If your agency belongs to an organization, its admins may open your CRM, depending on the access policy agreed with SADE: to work in it as your admins do, to look without changing anything, or not at all (numbers only). Each opening lasts at most 12 hours and is listed on your **SADE access** page, with the requests and changes made. See Organizations.

Private documents

Your verification documents are private:

- They are stored without any public link.
- Only your agency's admins and SADE's moderators can open them. Agents can't.
- Photos are re-saved when you upload them, which removes hidden camera data such as the place a photo was taken.

What is public

The marketplace is public by design, so some of what you enter is shown to everyone once your agency is verified and a listing is published:

- Your listings, with their photos, and your agency's public profile: logo, name, public email and phone, website, city and office address.
- The name and photo of the agent on each listing. An agent's work phone is shown to buyers who ask for it.

Some things never go public:

- A listing's exact position, unless you choose to show it. Otherwise the marketplace shows an area of about 300 metres around it.
- A listing's property code (its official cadastral number).
- Your clients, leads, deals and notes.

See Adding a listing for what each listing field shows.

Passwords and sign-in

- Passwords need at least 8 characters, with an uppercase letter, a lowercase letter, a number and a symbol.
- Five wrong passwords in a row lock the account for 5 minutes.
- Password reset links work for one day. Sign-up confirmation links work for 24 hours.
- Changing or resetting a password signs the person out on every device.
- When someone asks for a password reset or a new confirmation link, the CRM never says whether the email address has an account.

See Signing in.

Sessions

- With **Keep me signed in**, a session lasts 7 days. Without it, it lasts until the browser is closed, and at most 12 hours.
- Signing out in one browser tab signs you out in the others.
- When an agency admin removes an agent, the agent's sessions are ended and they can no longer sign in.

What happens to your data

- **When a plan ends**, most of the CRM closes, but nothing is deleted. Paying again brings everything back. See Plans and billing.
- **When an agent is removed**, their account is closed, but their listings, clients and deals stay in the agency.
- **When an organization deactivates one of its agencies**, nobody in it can sign in and its listings leave the marketplace, but its data stays.
- **When someone sends a website form**, the CRM keeps the consent wording they agreed to with their lead, as a record. See Website forms.

EXAMPLE

Ilir wants to know who has been inside Tirana Living's CRM this month. He opens **SADE access**.

He sees one SADE view, from the day he asked SADE for help with a lead's source: the reason, "1 minute", and the number of requests. Above it, under "Openings by Riviera Group", are two openings by Olsa Kola, each with 0 changes.

He also checks that only he can open the agency's QKB extract: Arta, Besnik and Erjona see the verification banner, but not the documents.

Frequently asked questions

Short answers to the questions agencies ask most, each with a link to the page that explains more.

Short answers to the questions agency admins and agents ask most often. Each answer links to the page with the full details.

Signing up and signing in

Do I need a card to start?

No. A new agency gets a 14-day free trial of a paid plan, and no card or payment is asked for at sign-up. You choose a plan and pay when you are ready. See Signing up your agency.

The confirmation email hasn't arrived. What do I do?

Check your spam folder, then click **Send the link again** on the sign-up screen or the sign-in page. The link works for 24 hours. See If the email doesn't arrive.

I forgot my password.

Click **Forgot password?** on the sign-in card and follow the link in the email. Resetting your password signs you out on all your devices. See Forgotten password.

Why can't I sign in after a few tries?

Five wrong passwords in a row lock the account for 5 minutes. Wait, or reset your password. See When sign-in fails.

How do I change the CRM's language?

Click your name at the bottom of the menu, then **Language**. The choice is kept in that browser. The agency admin sets the language the whole team starts in. See Language.

Your agency and your team

How do I add an agent? Do they get an email?

Open **Agents** and click **Add agent**. You choose the agent's first password and give it to them yourself: the CRM doesn't send them an invitation. See Add an agent.

Can agents see each other's clients?

No. Agents see their own leads and clients and the shared pond. The agency admin sees everyone's. See What each role can see and do.

Can our agency have two admins?

The Agents page adds agents only. Contact SADE to add a second agency admin. See A second agency admin.

Why does the CRM say "Agent limit reached."?

Every seat on your plan is taken. Remove an agent or move to a larger plan. Agency admins don't take a seat. See Seat limits.

What happens to an agent's listings and clients when they leave?

They stay in your agency, still under the agent's name. Reassign them to other agents before you remove the agent. See Remove an agent.

Can I change my agency's name or country?

You can change the name in **Agency settings** until SADE verifies the agency. After that, write to SADE with the new registration. The country can't be changed. See Agency settings.

Verification and the marketplace

Can we use the CRM before SADE has verified us?

Yes. The CRM works fully from the day you sign up. Only the marketplace waits: none of your listings or projects are public until SADE has verified the agency. See Verification.

Why isn't my listing on the marketplace?

Check three things. Is your agency **Verified**? Has SADE approved the listing? Has it been confirmed recently? A sale listing comes off the marketplace after 60 days without a confirmation, and a

rental after 30. If its status is **Rejected**, its page shows SADE's reason: fix the listing and save it to send it back for review. See Review and publishing and Listing quality.

EXAMPLE

Besnik can't find his flat in Laprakë on sadegre.com. The agency is **Verified**, and SADE approved the listing in September. On **Listing quality** he sees that it hasn't been confirmed for 60 days, so it came off the marketplace. He clicks **Still available**, and the listing is public again.

Who can open our verification documents?

Only your agency's admins and SADE's moderators. Agents can't, and the documents have no public link. See Security and privacy.

Plans and billing

What happens when the trial ends?

If you haven't chosen a plan, most of the CRM closes, but your data is kept. Signing in, **Plan & billing** and your notifications stay open, so you can pay and carry on. See When a plan ends.

Can we pay by bank transfer?

Yes. Write to SADE at support@sadecrm.com. SADE records the payment when it arrives, and your plan runs until the date you paid for. See Pay by bank transfer.

Do we get an invoice?

The CRM doesn't produce invoices. PayPal emails its receipt to the PayPal account that pays, and every payment is listed under **Payments** on **Plan & billing**. See Plans and billing.

How do we get projects?

Projects come with the Pro plan, or with an Enterprise organization. A developer always starts on a plan with projects. See Projects overview.

Daily work

Is there a phone app?

Yes: the SADE CRM app, for agents and agency admins. It isn't in the app stores yet, so SADE sends you the download link. You sign in with the same details as on the web. See The mobile app.

Can I bring in listings from my old system?

Yes. The agency admin can import a spreadsheet or connect a feed from **Settings**, then **Imports & feeds**. See Imports and feeds.

Can enquiries from our own website come into the CRM?

Yes. Add a website form under **Settings**, then **Integrations**, and enquiries from your site arrive as leads. See Website forms.

Can I export our data to Excel?

Two lists can be downloaded as Excel files: **Deals** and **Properties**, each with **Download Excel**. An agent's download holds only their own records. See Deals and Managing listings.

SADE and your privacy

Can SADE see our clients?

Only through a read-only view that lasts at most an hour, with a reason you can read. Your admins are notified when it starts, and every view is listed on the **SADE access** page. See SADE access.

Our group has several agencies. Can we manage them together?

Yes, on the Enterprise tier: an organization above your agencies, with one contract, shared reports and its own admins. Contact SADE to set it up. See Organizations.

Glossary

The words this guide and the CRM use, in alphabetical order, with a short definition of each.

The words this guide uses, with what each means in SADE CRM. Words in **bold** inside a definition have their own entry.

A

Access policy

What an **organization's** admins may do inside its agencies: **Full access** (work in the agency's CRM as its admin), **Read-only** (look, change nothing) or **Reports only** (see the numbers, never open the CRM). SADE sets it as part of the **contract**. See Organizations.

Action plan

A timed list of follow-up steps, such as a call at once and a WhatsApp message two hours later. Started on a client, its steps become **tasks** for the client's agent. See Tasks and action plans.

Agency

A company's account in SADE CRM: a real estate agency or a **developer**, with its own people, data, plan and settings.

Agency admin

The role that runs an agency's CRM: its team, settings, lead routing, billing and verification. The person who signs the agency up has it. See Team and roles.

Agent

The role for everyone else in an agency. Agents work on their own leads, clients, listings, viewings and deals, and see no settings.

Answer rate

The share of leads contacted within the agency's **response target**, over the last 30 days. See Lead routing.

Appointment

A booked **viewing** on the calendar, of a listing, a project or a single unit. Its status is Pending, Confirmed, Rescheduled, Cancelled, Completed or No show. See Calendar and viewings.

Assigned agent

The agent responsible for a listing or a client. They see it, get its enquiries by default and are notified about it.

B

Bank transfer

Paying SADE for a plan outside PayPal. SADE records the payment when it arrives and extends the plan. See Plans and billing.

Billing email

The address where SADE sends payment notices. Empty means the agency's own email.

Building board

A project drawn as buildings, floors and units, with each unit's status in colour. See The building board.

Buyer payments

The record, per project, of what each buyer owes and has paid, made from the project's payment plan. See Buyer payments.

C

Claim

Taking a lead from the **pond**, or a lead offered to you, as your own. The first agent to claim it gets it.

Client

Any person in the agency's CRM: a lead, a buyer, a tenant or an owner. A lead and a client are the same record. See Clients.

Commission (partner)

A **partner** agency's share of a project sale, recorded when the sale reaches contract. It is due, paid or cancelled. See Partners.

Confirmation link

A personal link a client opens after a viewing to confirm they saw the home. The first confirmation and its time are kept as a record.

Contract

An **organization's** agreement with SADE: the most agencies, agents and listings it can have, and an end date. It replaces the agencies' own plans.

CRM language

The language an agency's CRM starts in for everyone on the team. Each person can switch to another. SADE's emails and notifications to the agency's people follow it, the password emails included: Albanian if it is Albanian, English otherwise. Viewing emails are written in all 11 languages. See Agency settings.

D

Deal

An agreement to sell or rent one listing, with its final price, currency, date and status. Its status is Pending, In progress, Approved, Rejected, Cancelled or Completed. A completed deal marks the listing sold or rented. See Deals.

Developer

A company that builds and sells new developments. It signs up as a developer, has the same CRM with **Projects** at the top of the menu, and always has a plan with projects.

E

Escalation

Telling the agency admins that a new lead is still uncontacted after a set number of minutes. The agency can also have the lead moved to the **pond** at that moment.

Expired

A published listing taken off the marketplace because nobody confirmed it in time. Confirming it with **Still available** brings it back at once. See Listing quality.

F

First to claim

A routing choice: a new lead is offered to several agents for a set number of minutes, and the first to **claim** it gets it. If nobody does, it goes to the **pond**.

Floor plan

A layout on offer in a project, such as “2+1 A”, with its rooms, area and drawing. See Floor plans and facades.

Free plan

A plan with no end date and small limits. Where SADE offers one, an agency whose paid plan has ended may be moved onto it.

G

Guided tour

The short walkthrough of the dashboard that opens the first time you sign in. Reopen it from the **?** icon at the bottom of the menu.

H

Hold

Keeping an available project unit for one client for a set number of hours, 48 by default. See Holds and sales.

I

Imports & feeds

The settings page where the agency admin brings listings in from a spreadsheet or another system's feed, and sends listings out to other portals. See Imports and feeds.

L

Lead

A person who asked the agency for something, such as information about a listing or a viewing. Every lead is also a **client**. See Leads.

Lead routing

The agency's rules that decide which agent gets each new lead, and how fast it must be answered. See Lead routing.

Lender room

A read-only link, with an expiry date, that shows a project's sales and collection totals to the developer's bank. See The lender room.

List

A saved filter of clients that updates itself, such as "buyers with no contact for a week". Lists can be built in, shared with the agency, or personal. See Smart lists.

Listing

A home or commercial space the agency offers for sale or rent. The CRM calls it a property. Its status is Pending, Published, Rejected, Blocked, Sold, Rented or Withdrawn. See Review and publishing.

Listing quality score

A score out of 100 for how complete and up to date a published listing is. Higher scores rank higher on the marketplace.

M

Market

One of the 24 countries SADE works in. Each has its own rules, such as the documents for verification, the currencies listings may use and the energy certificate.

Market prices

Quarterly medians of asking prices per square metre, worked out from the marketplace's own listings. See Market prices.

Marketplace

SADE's public property website, sadegre.com, where verified agencies' published listings and projects appear.

O

Organization

The Enterprise tier: a group of agencies on one **contract** with SADE, run by **organization admins**. See Organizations.

Organization admin

The person who runs an organization's workspace. They belong to no single agency, and may open its agencies as the **access policy** allows.

Owner

The client who owns a listed home. Every listing added by hand has an owner.

P

Partner

Another agency invited to sell a project on agreed terms: a commission and a period of client protection. See Partners and Selling as a partner.

Payment overdue

The plan status when PayPal couldn't take a renewal and is trying again. The plan keeps running for up to 7 days after the paid period.

Plan

What an agency pays for: its price, its agent and listing limits, and whether it includes projects. See Plans and billing and the pricing page.

Pond

The shared pool of leads nobody is working yet. Any agent taking new leads can claim one.

Price book

A project's rules for working out unit prices from a base price per square metre. See Price book.

Project

A new development sold off plan or under construction, with buildings, floor plans and units, shown on the marketplace as one page. Projects come with the Pro plan or with an organization. See Projects overview.

Promotion

A paid place or boost for a listing or a project on the marketplace, for a fixed number of days, in markets where SADE offers them. See Promotions.

Property code

A home's official number, such as its cadastral number in Albania. Only one agency at a time can list a given code, and it is never shown publicly.

R

Requests to SADE

An agency's requests to SADE's moderators about a listing, for example when another agency has listed the same property code.

Response target

How many minutes the agency gives its agents to contact a new lead, set as **Contact new leads within** in lead routing.

Round robin

A routing choice: new leads go to a rule's agents in turn.

Routing rule

A set of conditions, such as source, city, property type or price, and who gets the leads that match. Rules are tried from the top down.

S

SADE access

The agency admin's page that lists every **view as agency** by SADE's staff, and every opening by the agency's organization. See Agency settings.

SADE staff

SADE's own admins and moderators. They check agencies and listings, and belong to no agency.

Seat

One active agent, counted against the plan's agent limit. Agency admins don't take a seat.

Source

Where a client first came from, for example SADE Marketplace or the name of a website form.

Stage

Where a client stands, from Lead to Closed, plus Nurture and Trash.

Still available

The button that confirms a listing is still on the market, and keeps it on the marketplace for another period: 60 days for a sale, 30 for a rental.

T

Taking new leads

An agent's availability switch at the top of the Leads page. Agents who are away are skipped by **lead routing**.

Task

A call, WhatsApp message, email, SMS or to-do with a due time, often for a client. See Tasks and action plans.

Template

A ready-made email, WhatsApp message or SMS with placeholders, such as the client's name, that agents send in a few clicks. See Templates.

Trial

The first 14 days after sign-up, on a paid plan, free of charge.

U

Unit

One flat, shop or other space in a project, with its own code, price and status.

V

Verification

SADE's check that an agency is a registered business. Until it is verified, none of the agency's listings or projects are on the marketplace. See Verification.

View as agency

The only way SADE's staff can look at an agency's clients, leads and deals: read-only, at most one hour, with a reason the agency reads, logged and notified to the agency admins.

Viewing

A visit by a client to a listing, a project or a unit. On the calendar it is an **appointment**. In the **viewing log** it is a record with its outcome and feedback.

Viewing log

The table of past viewings, with their outcome, the client's feedback and whether the client confirmed the visit. See Calendar and viewings.

W

Waiting list

Clients queued for a project unit that is taken. The first in line is told when it becomes free.

Webhook

An address on your own system that SADE CRM calls when something happens to a client. See API keys and webhooks.

Website form

Your own website's contact form, connected so that its enquiries arrive in the CRM as leads. See Website forms.

Website widget

One line of code that shows a project's building and enquiry form on the developer's own website. See Website widget.

In practice

EXAMPLE

A buyer fills in the **website form** on Tirana Living's site. The lead's **source** is the form's name, and the **routing rule** for rentals gives it to Erjona by **round robin**. Erjona is **taking new leads**, so she gets it, and the clock starts against the agency's 5-minute **response target**. She calls, books an **appointment**, and after the **viewing** the client opens the **confirmation link**. Two weeks later the **deal** is completed and the listing is marked Rented.