

Preliminary information

voxCRM Implementation Guide – Materials and Documents

Dear Sir or Madam,

Thank you for choosing voxDeveloper CRM. We carry out the implementation together with you. On our side, an **implementation manager** takes charge – they lead the entire process, run the training sessions and answer your questions as they arise. Our support department of more than ten people is also at your disposal.

The implementation consists of **10 steps**. Each step ends with a result that is visible in the system – so it is always clear which stage we are at and what comes next.

The first step is yours: please send us the [company and investment details](#), the [price list](#) and the [unit sheets](#). Based on these, we will launch the system and carry out its initial configuration, and then schedule a kick-off meeting – where we will show you the CRM already populated with your units. From the kick-off meeting onwards, we send an up-to-date schedule **at least every 2 weeks**: what has been done, what is in progress and what we are waiting for.

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Implementation map – 10 steps

The steps are grouped into four parts. We start by preparing the system with your data – so that

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even the first meeting takes place on your own units rather than on examples.

Step	What happens	Done when...
Preparation		
1. Starter materials	You send the company details, the price list, the unit sheets and the list of users.	We have the complete set of starter materials and the implementation manager has confirmed receipt.
2. System launch	We set up the system and the accounts, load the units and unit sheets, and carry out the initial configuration.	Every person on the list can log in to the CRM and sees your units there.
3. Kick-off meeting and dated plan	We demonstrate the system on your units and agree the dates of the next steps.	You have an implementation schedule with dates.
Sales in the CRM		
4. E-mail in the CRM	We connect the company mailboxes and the personal mailboxes.	You have sent a test e-mail from the CRM and it has reached the recipient.
5. Enquiries and portals	We connect the website forms, the portals and the enquiries mailbox.	A test enquiry from each source has appeared in the CRM automatically.
6. E-mail templates, online offer and consents	We prepare the e-mail templates, the online offer and the consent form – you only need to review them.	You have sent yourself a test online offer using a ready-made e-mail template.
7. Sales training	We train the sales staff: enquiries, offers, reservations.	Every salesperson has replied to an enquiry from the CRM and created a test reservation.
Contracts and after-sales service		
8. Contracts and payments	We set up the contract templates and payment schedules, and provide training on payment settlement.	You have generated a contract from the CRM and recorded a test payment.
9. Handovers, defects and after-sales documents	We set up handover reports, notices and payment demands, and provide training on after-sales service.	You have generated a test handover report from the CRM.
After the first month		
10. Review: reports and	We present reports,	The meeting summary lists the

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Step	What happens	Done when...
additional features	administration and features that may be useful to you.	features selected for launch in the following month.

Where to start and how long it takes

1. **Please appoint a person to coordinate the implementation.** A single person collecting materials on your side shortens the implementation more than a complete set of documents sent all at once.
2. **Please send the starter materials:** company and investment details, the price list (list of units with appurtenances), the unit sheets and the list of people who will work in the system ([details in step 1](#)).
3. **Please provide the contact details of your e-mail and website administrators as early as possible.** Connecting mailboxes and forms depends on people outside the sales department, which is why it usually takes the longest.

How long? From receipt of the starter materials to the kick-off meeting usually takes 1-2 weeks. Steps 4-7 take another 2-4 weeks. Steps 8-9 are planned according to your needs - contracts when signings begin, and after-sales service closer to the handover date.

Price list not ready yet? Please send a draft version - prices can easily be updated later. If there is not even a draft, please let your implementation manager know: we will launch the system with the company and investment details, start with e-mail and enquiries, and load the units once they are ready. **A late material delays one step, not the whole implementation.**

Where are we? The schedule from your implementation manager

At the kick-off meeting we agree the dates of the next steps, and immediately afterwards the implementation manager sends you the **implementation schedule** - the same 10 steps with dates and responsible persons. It is updated after every change, **at least every 2 weeks**. Each step has one of four statuses:

- **Done** - the step is completed and the "Done when..." condition is met,
- **In progress** - we are working on this step,
- **Waiting for you** - with the name of the missing material and of the person from whom we expect it,
- **Scheduled** - a step with an agreed date.

This is what a sample schedule looks like in the fifth week of implementation:

Zielone Tarasy investment · updated: Friday, week 5 · next update: within 2 weeks at the latest

Step and who	When	Status
1-2. Materials and launch you + us	week 1	Done
3. Kick-off meeting implementation manager	weeks 1-2	Done
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Step and who	When	Status
4. E-mail us + e-mail admin	weeks 1-2	Done
5. Enquiries and portals us + website admin	weeks 1-2	In progress – website form works, portals being connected
6. E-mail templates and offer us: templates · you: comments	week 2	Waiting for you – comments on the e-mail templates (Ms Anna)
7. Sales training implementation manager + sales staff	Thursday, weeks 2-3	Scheduled
8. Contracts and payments you: contract templates	weeks 3-4	Waiting for you – development agreement template (Mr Tomasz)
9. After-sales implementation manager	before handovers	Scheduled
10. Review implementation manager	one month after step 7	Scheduled

Have you not received an update for more than 2 weeks? Please write to your implementation manager or to kontakt@voxdeveloper.com – we will send you the current schedule.

What we do and what we ask of you

Implementation manager	Your team
• launches the system with your data before the kick-off meeting, • sends a dated schedule after the kick-off meeting, • updates it at least every 2 weeks, • schedules the next steps and training sessions, • sends a summary within 1 business day after each meeting: what has been done, what comes next and who does what, • prepares the e-mail and consent templates – you do not have to write them from scratch, • confirms receipt of materials and sends reminders about missing ones.	• appoints one person to coordinate the implementation, • sends the starter materials, and then the materials for the current step, • provides the contact details of the e-mail and website administrators, • invites to the training sessions the people who will work in the area concerned, • informs the implementation manager when a material is delayed – we will reorder the steps.

Materials checklist

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All materials in the order of the steps. To get started we need the first group – the rest can be sent gradually.

Material	Format	Template to download
Step 1 · Starter materials		
Coordinating person and list of users	e-mail	-
Company and investment details	data / e-mail	-
Price list (list of units)	Excel (.xlsx)	Price list template
List of appurtenances	Excel (.xlsx)	in the price list file
Unit sheets	PDF	-
Client database (if you already have one)	Excel (.xlsx)	Client list template
Steps 4-6 · Sales in the CRM		
E-mail: mailboxes and administrator contact	data / e-mail	-
Portals and website administrator contact	data / e-mail	-
Data for dane.gov.pl	data / e-mail	-
Comments on our e-mail templates (optionally your own templates)	Word (.docx) / text	prepared by us
Approval of GDPR consent wording	text	examples in this guide
Floor plans	JPG / PDF	-
Visualisations, logo, investment site plan	PDF / JPG	-
Step 8 · Contracts and payments		
Contract templates and prospectus	Word (.docx)	-

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Material	Format	Template to download
Payment schedules	Excel / PDF / text	-
List of signed contracts and payments	Excel (.xlsx)	Contract list template
Document template for the notary	Word / Excel	-
Step 9 · After-sales		
Handover report, notices, payment demands	Word / Excel	-

Preparation · Steps 1-3

Before we meet, we prepare the system with your data. This way the kick-off meeting takes place on your own units rather than on examples.

Step 1. Starter materials

You: appoint a coordinating person and send: the company and investment details, the price list with appurtenances, the unit sheets and the list of people who will work in the system (first name, last name, e-mail, department). If you already maintain a client database, please include it.

We: send this guide, answer questions about file formats and confirm receipt of the materials.

Done when: we have the complete set of starter materials and the implementation manager has confirmed receipt.

Company and investment details

We start launching the system with the details of the development company and of the investment being sold.

Basic company details:

- Full company name (exactly as in official documents)
- NIP (tax identification number)
- REGON (statistical number)
- KRS number or CEIDG entry (for civil-law partnerships)
- Full address of the registered office

Basic investment details:

- Investment name
- Which company is carrying out the investment
- Full address of the investment

Investment phases: if the investment is divided into phases, please list them together with their names - we will reproduce this structure in the system.

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Investment price list

Format: Excel (.xlsx)

The list of units is the foundation of the system – offers, reservations, contracts and reports are all based on it. That is why we ask for the price list at the very beginning: we will load it before the kick-off meeting.

What we need:

- A price list for importing the investment, in the form of a completed Excel file template
- You can use our "Cennik (lista lokali) – wzór" (Price list (list of units) – template) or send your own file
- [Download the Excel price list template](#)

Tip: a price list prepared using our template can be imported fastest and without further clarification. If it is more convenient for you to send your own file - we will accept it as well and adapt it for import. Is the price list still changing? Please send a draft version – prices can easily be updated later.

List of appurtenances

Format: Excel (.xlsx) - may be combined with the price list

What it covers:

- Parking spaces
- Storage units
- Bicycle storage boxes
- Other appurtenances together with their prices

All additional appurtenances can be sent together with the units in a single file.

Unit sheets

Format: PDF

The system accepts unit sheets in PDF format.

Many files or large files? Large unit sheets, floor plans and visualisations can be sent via a file transfer platform, e.g. wettransfer.com. Please do not send files containing personal data (client database, contract list) via public services – a secure method of transfer will be agreed with the person leading the implementation.

Client database

Format: Excel (.xlsx)

If you already maintain a list of clients (e.g. in a spreadsheet), we will import it into the system – sales staff will immediately see the contact history. The list of signed contracts and payments is imported in [step 8](#).

- [Download the Excel client template](#)
- You may also send your own file

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Step 2. System launch

You: this step is on our side. In the meantime, it is a good idea to send us the contact details of your e-mail and website administrators.

We: set up the system and user accounts, load the price list, appurtenances and unit sheets, import the client database, and carry out the initial configuration of the system for your sales.

Done when: every person on the list can log in to the CRM and sees your units there.

Step 3. Kick-off meeting and dated plan

You: invite the coordinating person and the sales manager.

We: demonstrate the system on your units, discuss the next steps and agree their dates. Within 1 business day after the meeting, we send a summary and the implementation schedule.

Done when: you have an implementation schedule with dates.

Sales in the CRM · Steps 4-7

Goal: enquiries from portals, the website and e-mail reach the CRM, and sales staff handle clients there – from the first contact to the reservation.

Step 4. E-mail in the CRM

You: provide the mailbox addresses and the contact details of the e-mail administrator.

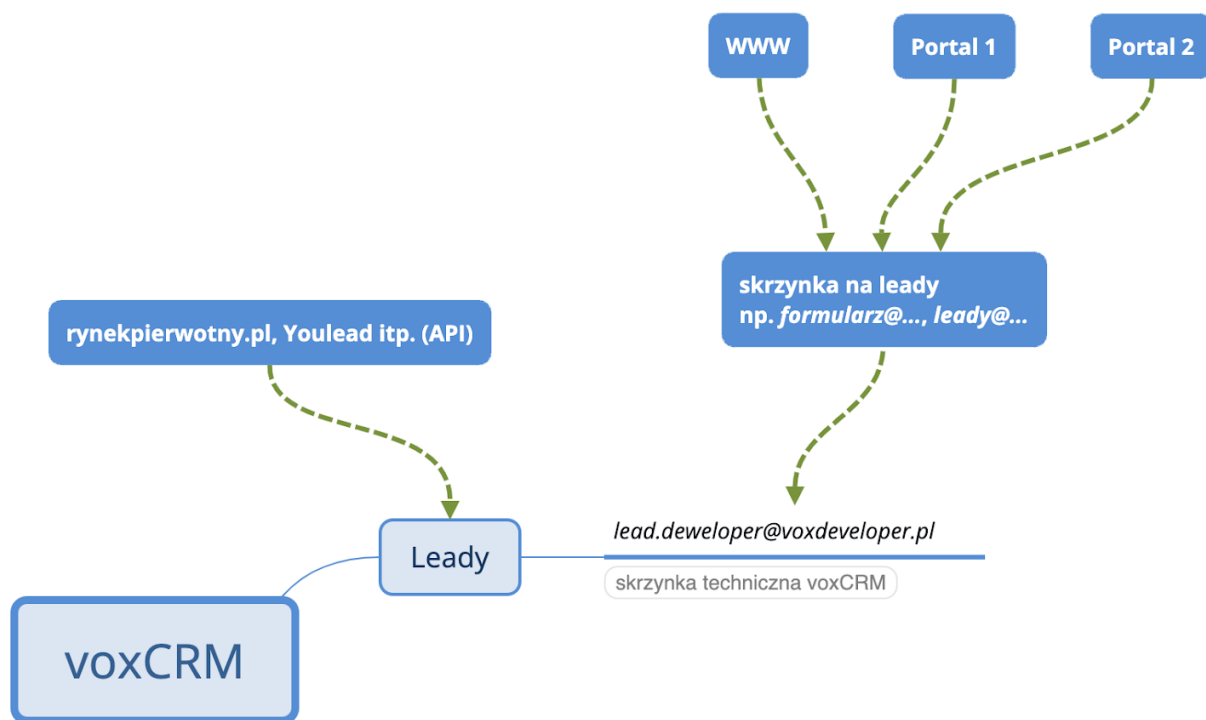
We: connect the company mailbox, the personal mailboxes and signatures, as well as the forwarding from the enquiries mailbox (used in step 5).

Done when: you have sent a test e-mail from the CRM and it has reached the recipient.

E-mail configuration

Mailbox for collecting enquiries (leads)

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- Do you have a single mailbox for collecting enquiries from the internet?
- Examples: formularze@, leady@, zapytania@ etc.

Such a mailbox is used only to collect enquiries from websites and property listing portals (it should not be used for outgoing correspondence). Forwarding (sending a copy or adding to CC) to voxCRM must be set up on it, to the address **[nazwa systemu].lead@voxcrm.eu**. Copies of enquiries will then reach the system and be converted into leads - the contact details will be filled in automatically.

Forwarding address: the exact address for your system will be provided by your implementation manager.

Connecting mailboxes for sending messages



1. Main mailbox for correspondence

- Do you have one general mailbox for sending correspondence to clients?
- Examples: sprzedaz@, biuro@, kontakt@
- It is used for bulk e-mails, notices and information to clients, as well as autoresponder

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messages for leads.

2. Users' personal mailboxes

These are used by users to send personal correspondence to clients, e.g. offers. They are connected individually to each voxCRM account.

Note: if a user does not have a personal mailbox connected, all of their messages are sent from the main mailbox.

E-mail signatures

An individual e-mail signature can be set for each user; it will be added automatically to messages sent from the system (unless it has already been set in the e-mail client).

- [What are the benefits of connecting the company mailbox and users' e-mail accounts?](#)
- [How to connect individual e-mail accounts to voxCRM](#)

Step 5. Enquiries and portals

You: provide the list of portals, the contact details of the website administrator and the data for dane.gov.pl.

We: connect the website forms, the portals and the enquiries mailbox, and set up the autoresponder for new enquiries, the export of offers to portals and the data for dane.gov.pl.

Done when: a test enquiry from each source (website form, portal, mailbox) has appeared in the CRM automatically.

Integrations and contact details

List of property listing portals

We need information about the portals you use - in order to connect the transfer of enquiries to voxCRM and/or the automatic export of investment data to the portals:

- Portal names
- Contact details of your account manager at the portal (e-mail, telephone)

Administrators

Contact details of:

- Your website administrator (e-mail, telephone) - to connect the transfer of enquiries from contact forms
- Your mailbox administrator (e-mail, telephone) - to connect the mailboxes to voxCRM

Data for dane.gov.pl

The CRM generates data on unit prices in the format required by the Polish Ministry of Digital Affairs. In addition to the company and investment details from step 1, please provide:

Additional company details:

- Website address

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- Contact e-mail address
- Telephone number

Additional investment details:

- Investment website address
- Address of the web page where the client can consult the prospectus
- Sales office address

Tip: this information can also be completed later directly in the system, following the instructions in the article: [Generating data for dane.gov.pl](#).

Step 6. E-mail templates, online offer and consents

You: send comments on our templates, approve the consent wording and, for the online offer, provide floor plans, visualisations and the logo.

We: prepare a complete set of e-mail templates, the online offer with your materials and the GDPR consent form with your company details.

Done when: you have sent yourself a test online offer using a ready-made e-mail template, and a test client has saved their consents via the form.

E-mail templates

Format: Word (.docx) or text

We prepare the e-mail templates – you do not have to write them from scratch. We send them to you for review and, once we have your comments, set them up in the system. A typical set:

- reply to an enquiry from a portal or the website,
- e-mail with an offer of units,
- follow-up after a meeting or presentation,
- other client communication templates – according to your needs.

If you already have your own templates, we will adapt them instead of ours.

After selecting a few specific units, a table with their details can be generated in the message - the columns and the table colour are configurable.

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Tworzenie maila

— ✕

Odbiorcy *

Kowalski Piotr (pkowal@eou.pl) ✕

DW | UDW

Temat *

Jaworowe Wzgórze - Oferta

Wiadomość *

← → Jaworowe Wzgórze - Oferta B I S U I Helvetica 14px

Jaworowe Wzgórze

Dziękuję za zainteresowanie ofertą mieszkań w inwestycji **Jaworowe Wzgórze**

W odpowiedzi na Państwa zapytanie przesyłam szczegółowe informacje na temat osiedla. Zapraszam do kontaktu oraz na spotkanie. Chętnie pomogę w wyborze idealnego mieszkania i przeprowadzę Państwa przez cały proces zakupu.

Spotkania odbywają się w naszym Biurze Sprzedaży przy ul. Świętokrzyskiej 18 w Warszawie, po wcześniejszym umówieniu terminu.

Inwestycja	Etap	Numer	Powierzchnia	Piętro	Metraż balkonu	Cena za m2	Cena promocyjna za m2	Cena lokalu	Cena promocyjna	Karta	Cena brutto z ost. 30 dni
Jaworowe Wzgórze	2	6.45	59,97	2	5,92	8 801,07 PLN	6 670,00 PLN	527 800,13 PLN	400 000,00 PLN	Pobierz	527 800,13 PLN
Jaworowe Wzgórze	2	6.47	35,37	2	4,56	10 566,86 PLN	2 544,53 PLN	373 750,00 PLN	90 000,00 PLN	Pobierz	373 750,00 PLN
Jaworowe Wzgórze	2	6.48	36,66	2	5,18	10 567,38 PLN		387 400,00 PLN		Pobierz	

ZOBACZ OFERTĘ

0 sł.

Załączone pliki (4)

Zamknij

Wyślij

GDPR wording for consent forms

The system allows you to send the client a link to a consent form which, once saved, updates the consents on the client record. The consent wording can be set individually for each company.

Sample GDPR consent wording:

Type of consent	Sample wording
Data processing	I consent to the processing of my personal data for marketing purposes by NAZWA_SPÓŁKI and its affiliated companies.
E-mail messages	I consent to receiving commercial information by electronic means of communication in accordance with Article 10 of the Polish Act of 18 July 2002 on the provision of electronic services.
Telephone contact	I consent to the use of telecommunications terminal equipment and automated calling systems for direct marketing purposes in accordance with Article 172 of the Polish Telecommunications Law of 16 July 2004.
Information about the data controller	I acknowledge that the controllers of my personal data are NAZWA_SPÓŁKI, ULICA_SPÓŁKI, KOD_POCZTOWY MIASTO_SPÓŁKI and its affiliated companies. The legal basis for the processing is your explicit and voluntary consent to the processing of data for marketing

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Type of consent	Sample wording
	purposes. You have the right to withdraw your consent at any time without affecting the lawfulness of processing carried out on the basis of consent before its withdrawal. Personal data will be stored from the moment consent to the processing of personal data is obtained until it is effectively withdrawn. You have the right to request access to your personal data, its rectification, erasure and restriction of processing, the right to object to processing, the right to data portability and the right to lodge a complaint with a supervisory authority.

Note: the fields written in capital letters (NAZWA_SPÓŁKI, ULICA_SPÓŁKI, KOD_POCZTOWY, MIASTO_SPÓŁKI) are placeholders into which the system automatically inserts the details of the relevant company - please leave them unchanged in the text.

Floor plans

Format: JPG or PDF

Floor plans can be added to the system and the corresponding units and appurtenances marked on them - this enables graphical property search.

- The floor plan should include unit numbering
- The colours of the dots indicate availability: **green** - available, **red** - sold/unavailable, **orange** - verbal reservation

Such a marked-up floor plan can then be downloaded as a PDF and sent to the client to show availability, e.g. of parking spaces.



Additional investment documents

Format: PDF, JPG

The system allows you to store and manage additional documents related to the investment:

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- Investment visualisations
- Investment maps
- Developer logo
- Investment site plan
- Investment logo

These documents can then easily be attached when communicating with clients.

Step 7. Sales training

You: invite the sales staff and the sales manager, each with a working account.

We: provide training on your data: handling enquiries, adding clients and activities, sending offers from templates, verbal reservations. For larger teams we split this into two shorter sessions. Within 1 business day after the training, we send the recording and a summary.

Done when: every salesperson has replied to an enquiry from the CRM and created a test reservation.

Contracts and after-sales service · Steps 8-9

We plan these steps according to your needs: contracts – when the first signings are approaching, after-sales service – closer to the handover date.

Step 8. Contracts and payments

You: send the contract templates and prospectus, the payment schedules and – if sales are already under way – the list of signed contracts and payments.

We: set up the contract and schedule templates, import the contracts and payments, and provide training on creating contracts and settling payments for the sales staff and the finance department.

Done when: you have generated a contract from the CRM and recorded a test payment.

Contract templates and prospectus

Format: Word (.docx)

The system can generate contracts from templates. We need:

- Reservation agreement template
- Development agreement template
- Preliminary agreement template
- Information prospectus

Important: please send the templates in .docx format (e.g. from Word) and highlight (e.g. in yellow) the places where the system should fill in data automatically.

Payment schedules

Format: Excel, PDF or text

Multiple payment schedule templates can be configured in the system and assigned to specific investments or their phases.

Sample schedule template (default reservation fee: PLN 10,000, payment schedule after signing)

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the development agreement):

Tranche	Percentage share	Payment deadline
Tranche / instalment 1	10% (–PLN 10,000 reservation fee)	14 days after signing the contract
Tranche / instalment 2	20%	3 months after signing the contract
Tranche / instalment 3	20%	after completion of the shell construction
Tranche / instalment 4	20%	after the building is closed
Tranche / instalment 5	20%	after installation works are completed
Tranche / instalment 6	10%	before the unit handover

Each schedule is assigned to a specific investment, and one investment can have several such templates, e.g. split by building or phase.

List of signed contracts and payments

Format: Excel (.xlsx)

If sales are already under way, we will import the signed contracts and payments – so that all settlements are in one place from the start.

- [Download the Excel contract template](#)
- You may also send your own file

Document template for the notary

Format: Word (.docx) or Excel (.xlsx)

The system can generate a data set relating to the development agreement - as a table or as a document for the notary. A basic default template is built in, but if you have your own, please send it to us.

Step 9. Handovers, defects and after-sales documents

You: send the templates of the handover report, notices and payment demands; invite the technical service staff to the training.

We: set up the document templates and provide training on after-sales service: defect reports, unit handovers, tenant alterations.

Done when: you have generated a test handover report from the CRM.

Other documents with client data

Format: Word (.docx) or Excel (.xlsx)

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The system can generate custom templates, including:

- Payment demand
- Notice of completion of works
- Handover report

Important: files should preferably be sent in .docx or .xlsx format, with the places where the relevant data should be pulled from the system highlighted (e.g. in yellow).

After the first month - Step 10. Review: reports and additional features

About a month after the sales training (step 7), we meet to check how the team is working in the system and to show what else could help you.

You: note down what takes up the most time in your work and what information management is missing.

We: go through the reports and tailor them to your needs, train the person administering the system (templates, dictionaries, users and permissions, bulk unit editing (Grupowa edycja lokali)) and propose features to launch.

Done when: the meeting summary lists the features selected for launch in the following month, with dates.

Features worth knowing about

At the review we show, among other things:

- **Online offers with activity tracking** – you can see whether the client opened the offer, how many times they viewed it and which units they were interested in. Examples: [GVD – Głowackiego 22](#), [Milestone – Przystanek Ursus](#), [Górskie Resorty – The View Mountain](#), [Proxin – Kapitanat Garbary](#), [SGI – Mokotów Ananasowa](#) ([how it works](#)).
- **AI Assistant** – analyses the client's history and suggests next steps to the sales staff.
- **Automations** – client contact scenarios that run on their own.
- **SMS from the CRM** – individually and in bulk, thanks to the integration with [SMSAPI](#).
- **Automatic portal updates** – [otodom.pl](#), [nieruchomosci-online.pl](#), [rynekpierwotny.pl](#) and others ([export options](#)).

There is no need to wait for the review – you can ask your implementation manager about any of these features at any time.

Training - scope and preparation

Training sessions are run online by the implementation manager. Each session is scheduled once the materials for the given step are already in the system – so that we practise on your units, clients and contracts rather than on sample data. Within 1 business day after each session, we send the recording and a summary.

List of training sessions

Training	Step	Scope
Kick-off meeting	3	overview of the system on your units, demonstration of the basic features, dated implementation plan, questions

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Training	Step	Scope
Sales training	7	handling enquiries, adding clients, recording activities, sending offers and online offers, verbal reservations
Contracts and settlements	8	creating contracts, payment schedules, recording payments, notices to clients, invoices
After-sales service	9	defect reports, unit handovers, handover defects, tenant alterations and the related agreements
Administration and reports	10	e-mail and document templates, dictionaries, users and permissions, bulk unit editing, reports tailored to the company

How to prepare for a training session?

- **The right participants.** Those who benefit most are the people who will do the work in the system: sales staff in the sales training, the finance department in the settlements training, technical service staff in the after-sales training. It is worth having the sales manager attend the kick-off meeting and the sales training.
- **Working accounts.** Participants should have access to the system so that they can carry out a few actions themselves during the training, e.g. add a client, send an offer or record a payment.
- **Questions from day-to-day work.** It is worth writing them down before the meeting - we will answer them using your data as an example.
- **One area per meeting.** If there are more topics, we will schedule another training session rather than extend the current one.

Where to send materials?

Please send all materials to: kontakt@voxdeveloper.com

In the subject line, please state the company name and the type of material, e.g. "Price list - Zielone Tarasy investment". This way the material goes straight to the right person, and the implementation manager will confirm receipt.

The client database and the contract list contain personal data - please transfer such files in the manner agreed with the person leading the implementation.

File templates to download

- Price list (list of units) - [template.xlsx](#)
- Client list - [template.xlsx](#)
- Contract and payment import - [template.xlsx](#)

Contact

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If you have any questions about the implementation or need further information, please contact your implementation manager or:

- **E-mail:** kontakt@voxdeveloper.com
- **Telephone:** 534 571 638

The implementation manager and the voxCRM support team are at your disposal at every stage of the implementation.

Unique solution ID: #1279

Author: n/a

Last update: 2026-10-14 12:38