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Broker Portal BRD Template for Real Estate Developers

The requirements checklist I use when scoping broker management portals — refined across enterprise builds for developers like Emaar and Aldar. Copy it, fill in the [highlighted] blanks with your own answers, and you have a Business Requirements Document your vendor or internal team can actually build from.

12
Requirement sections

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— HOW TO USE THIS TEMPLATE

Work through each section with your sales, finance, and IT leads. Every unanswered checkbox is a decision your project will otherwise make by accident — usually during UAT, at the most expensive possible moment. If a section doesn't apply, delete it and note why; a short honest BRD beats a long aspirational one.

01 Project Overview & Objectives

Anchors every later trade-off. If you can't measure the objective, you can't accept the delivery.

- [ ] Business problem in one paragraph — what breaks today without a portal? [current process & pain]
- [ ] Measurable objectives, e.g. broker onboarding time from [X days] to [Y hours]; EOI-to-booking conversion; commission payout cycle time.
- [ ] In-scope projects/communities at launch [list] and explicit exclusions.
- [ ] Launch deadline and what drives it (project launch date, sales event) [date].

02 Stakeholders & Roles

Portals fail on unclear ownership more than on missing features.

- [ ] Internal roles: sales admin, broker relations, finance, legal/compliance, IT — with a named owner per area [names] .
- [ ] External roles: agency owner, agency admin, individual agent — and what each may see and do.
- [ ] Decision authority: who approves brokers, deals, and commission exceptions?

03 Broker Onboarding & KYC

Self-service registration is the single biggest time-saver a portal delivers — if the document and approval rules are defined up front.

- [ ] Registration flows for **agencies** vs **individual agents**; can agents self-register under an approved agency?
- [ ] Required documents: trade license, RERA/DED broker card, Emirates ID/passport, VAT certificate, bank details [adjust per market — RERA (Dubai), ADREC (Abu Dhabi), REGA (KSA)] .
- [ ] Document expiry tracking and automatic re-verification reminders.
- [ ] Approval workflow: steps, SLA per step [e.g. 48h] , rejection reasons, re-application rules.
- [ ] Broker agreement signature — wet ink or e-signature [provider] — before activation.

04 Inventory Access & Availability

Stale availability is how units get double-booked and brokers lose trust in the portal.

- [ ] Source of truth for unit status [CRM / ERP / portal] and maximum acceptable sync lag [seconds/minutes] .
- [ ] What brokers see per unit: price, floor plan, view, payment plan, service charge — and what they must not see [e.g. discounts, margins] .
- [ ] Visibility rules: all inventory to all brokers, or tiered/allocated releases per agency?
- [ ] Unit hold mechanism: who can hold, hold duration [minutes] , auto-release rules.
- [ ] Launch-day mode: expected concurrent brokers [number] and queue/fairness rules for hot releases.

05 Client Registration & Conflict Rules

The most disputed area of any broker program. Write the rules before the first dispute, not after.

- [ ] Client registration: which fields identify a client `[passport / Emirates ID / phone]` ?
- [ ] Protection rules: first-to-register wins for `[X days]` ? What renews protection?
- [ ] Conflict resolution: what happens when two brokers claim one client — automated rule, escalation path, final authority.
- [ ] Direct-client collision: rules when a registered broker client approaches the developer directly.

06 EOI & Deal Submission

This is the pipeline your sales team will live in — every stage needs an owner and an SLA.

- [ ] EOI form contents and required attachments; token/EOI amount `[amount]` and payment method (gateway, transfer, cheque).
- [ ] Deal stages from EOI → allocation → booking → SPA `[your stages]` , with owner and SLA per stage.
- [ ] Broker visibility: which stages and statuses can the broker track in the portal?
- [ ] Refund and cancellation flow for failed or withdrawn EOIs.
- [ ] Document generation: reservation forms and SPAs auto-generated from deal data `[templates list]` .

07 Commission Management

Automated, transparent commissions are the #1 reason brokers prefer one developer's portal over another's.

- [ ] Commission structures: flat %, tiered by volume, per-project overrides, launch incentives `[your structure]` .
- [ ] Trigger point: what makes commission payable `[e.g. SPA + X% collected]` ?
- [ ] Calculation transparency: can the broker see expected commission per deal, and a statement of pending vs paid?
- [ ] Invoice submission flow (broker-uploaded vs auto-generated) and VAT handling.
- [ ] Approval chain and payout SLA `[days]` ; clawback rules for cancelled deals.

08 Communications & Notifications

- ☐ Notification events (approval, new release, deal stage change, commission paid) and channels per event [email / WhatsApp / push / in-portal] .
- ☐ WhatsApp Business API usage and template approval ownership.
- ☐ Broadcast tools: who can announce releases/price changes to the broker network, with what approval?
- ☐ Language requirements [English / Arabic / both] .

09 Dashboards & Reporting

- ☐ Broker-facing: pipeline, conversion, commission earned, ranking/leaderboard [yes/no] .
- ☐ Developer-facing: sales by agency/agent/project, EOI aging, commission liability, top-broker analysis.
- ☐ Exports and scheduled reports for management [recipients & cadence] .

10 Integrations

List every system the portal must talk to — each one is a workstream with its own owner on the other side.

- ☐ CRM [Salesforce / Dynamics / other] — direction of sync for leads, deals, and clients.
- ☐ ERP/finance [Oracle / SAP / other] — receipts, invoices, commission payouts.
- ☐ Payment gateway [provider] for EOI/token payments, with reconciliation flow.
- ☐ E-signature, document management, and WhatsApp API providers [providers] .
- ☐ SSO/identity for internal users [Azure AD / Okta / other] .

11 Security, Compliance & Non-Functional

- [ ] Regulatory: RERA/ADREC/REGA record-keeping, marketing permit rules, anti-money-laundering checks [per market] .
- [ ] Data privacy (UAE PDPL / KSA PDPL): consent capture, retention periods, data residency [region] .
- [ ] Access model: agency-level data isolation — one agency must never see another's clients or deals.
- [ ] Performance targets: page load [s] , concurrent users at launch [n] , uptime [%] .
- [ ] Audit trail on every deal, price, and commission change.

12 Acceptance Criteria & Rollout

- [ ] UAT scenarios per section above — written by the business owner, not the vendor.
- [ ] Pilot group: [n] friendly agencies before full network rollout.
- [ ] Broker training and onboarding materials [owner] ; support channel for brokers post-launch.
- [ ] Success review at [30/60/90] days against the Section 01 objectives.