Wipfli Connect
for Real Estate

Build, sell, manage

From construction and assets to leases, tenants and investors, property management has many moving parts. However, most CRM tools barely scratch the surface of everything you need to control.

Wipfli Connect for Real Estate is tailored for property developers and managers. Integrate your entire business into one unified platform. Manage properties, leads, contracts, payments, inspections, handovers and much more.

Everything you need to run your business

Wipfli Connect for Real Estate consolidates separate silos of information for a truer read on costs, better decision-making and enhanced profitability.

Reduce risk and prevent costly oversight with project tracking tools. Schedule alerts to keep everyone focused on the next right step. And set up workflows to automate routine processes.

Built for the way you already work, Wipfli Connect for Real Estate turns data into actionable information and gives you — and everyone connected with your property — an easy way to see accurate, real-time information.

An end-to-end solution for your real estate and property development needs.

WIPFLI

Get control of your portfolio

Efficiency, transparency, automation: Drive growth with Wipfli Connect for Real Estate.

Property development

Coordinate development, from planning through punch-list. Track revenue and expenses for each project and get a truer forecast of profits and losses. Wipfli Connect for Real Estate supports "build and hold" and "build and sell" development models.

Real estate sales

Manage leads, offers, broker commissions and legal fees. Implement workflows that trigger task alerts for your team. Collect all critical documents in one place and provide gated access to authorized partners.

Property management

Track inventory, budgets and vacancies. Manage maintenance requests, payments and marketing. Automate fees and notices. Central document storage and email tracking keeps tenant and owner communication in one central place.

Reports and dashboards

Visualize complex data and keep track of key metrics. Wipfli Connect for Real Estate comes prebuilt with intelligent reporting tools for sales, marketing, team performance and more.

Security

Assign user roles and define permissions to give partners access to relevant data. Keep sensitive project and customer data safe from outside access.

Mobile

Cloud-based tools mean you can work remotely from any device. Collaborate and connect wherever work happens.

Integration

Built on the Microsoft Dynamics CRM, Wipfli Connect for Real Estate integrates with the entire Microsoft suite and many third-party applications. Get a familiar interface that works with the tools you already use.

Let's get started

See how Wipfli Connect for Real Estate can help your business scale.

wipfli.com/WipfliConnect