

Request for information

For property management software

The purpose of the undertaking is to develop a CRM software + mobile application – or customizing an existing platform - covering all work processes related to property rental.

The structure of the interface:

Settings

This is where all the parameter settings are to be specified determining the operation of all other functions.

Value sets:

- property type: apartment, shop, parking slot, storage, office, etc.
- parameters (public data can be checked as such – i.e. appears on the website):
 - floor space, integer input
 - balcony size, integer input
 - floor, select (ground floor, 1, 2, 3, ... 17)
 - number of rooms, select (studio, studio with alcove, etc.)
 - bathroom, select
 - type of heating, select
 - ceiling height, select
 - orientation, select
 - view, select
 - panoramic, select (radio button or checkbox)
- amenity categories (2-level):
 - General – these can only be checked, whether a given apartment has it, however, these items will not be listed in the inventory
 - window blinds
 - smart home
 - air conditioning
 - Kitchen
 - refrigerator
 - oven
 - 4-zone hotplate
 - etc.
- services
 - surveillance camera
 - concierge service
 - gym
 - etc.
- Public utilities
 - electricity consumption meter
 - cold water consumption meter
 - hot water consumption meter

- gas consumption meter
 - heat consumption meter
- Construction technology
 - brick
 - prefab panels
 - etc.
- Property statuses: whether an apartment of a certain status is public can be marked individually at the given statuses
 - for rent
 - for rent until
 - under reconstruction until
 - etc.

Projects

Projects (buildings) in which the apartments on offer are located, can be entered here.

- project name - input
- construction date - input
- number of floors - integer input – this can determine the maximum number of floors for the apartments in the given project
- construction technology - select
- elevator - yes / no
- shops on the ground floor - yes / no
- Telco service provider - input
- Services - checkbox list from value set

Inventory

All amenity items present in any one of the apartments can be entered here.

The amenity items can be classified in the amenity categories list created in Settings.

The amenity items specific to a given apartment can be selected on the data sheet of the apartments.

The data sheet of the apartment can be linked from this list.

The items are as shown below:

- name
- description
- date of acquisition
- price of acquisition
- end of guarantee period
- copy of invoice
- photos
- depreciation rate
- visible, location of a given item can be seen, link from here redirects to the data sheet of the apartment
- status
- current value – calculated figure

All these items will bear a unique ID, QR/bar code can be generated from this. When creating a new item, the bar code is automatically created by the system and can be printed with a click of the mouse. The bar code can later be printed whenever needed.

The database is searchable with a bar code reader.

Users

The list of users using the interface. Having the appropriate authorization level, new user may be created, existing ones edited, deleted.

Projects can be linked to users so that they can only access data pertaining to those apartments they are authorized to see.

Authorization levels

- superuser – can see and modify anything
- logistics – can access the inventory function
- property management – can access apartments s/he is linked with, of those, the user can see everything within this
- reader – can record the utility meter readings for apartments linked to her/him
- etc.

THE EXACT AUTHORIZATION LEVELS ARE YET TO BE DISCUSSED!

Tenants

Tenants can be listed and searched for in the contracts menu, discussed below, for the sheer purpose of easily finding them by name.

From here, links can point to any related object (e.g. apartment, contract, etc.)

Owners

Owners can be listed and searched for in the contracts menu, discussed below, for the sheer purpose of easily finding them by name. From here, links can point to any related object (e.g. apartment, contract, etc.)

Recording meter readings

This function is intended to be placed in a separate main menu item as it will be primarily used by users with “reader” authorization, who may access only this interface.

First, the apartment is to be selected, the meters linked with the given apartment are then displayed in separate rows. The reading and a photograph of the meter can be uploaded for each meter.

Readers will do all this using a tablet, so the interface is to be designed to be easy-to-use, the photographs are to be uploaded directly from the camera of the tablet.

This function will only be active at times of reading the meters.

Apartments

All apartments on offer are listed under this menu item and almost any matter can be taken care of here. Further navigation is necessary in the form of tabs or submenus.

The list can be searched, filtered according to project, address, number of rooms, type, status, owner, etc.

Basic information:

- type of apartment - select
- address
 - ZIP code -> city
 - street
 - house number
 - floor
 - apartment
 - lot number

Owner information:

The owners of the apartment are listed here in reverse chronological order. In case of selling of the property, the new owner can be recorded here.

Owner information:

- owner's name - input
- phone number - input
- email address - input
- land registry insert (title deed) - file
- beginning – end of contract – when the new owner is added, the contract with the previous owner is automatically terminated, or if it has already been terminated, the beginning of the new contractual period should be set here automatically - validation
- management fee – as these changes, it is to be broken down to time periods
- other documents

A contracts button should be placed next to the owners, clicking it would take us to the 'contracts' tab.

We may consider creating a similar interface for the tenants.

Parameters:

The list of parameters can be created under the 'settings' menu, the whole list appears here, and information can be added.

Amenities:

A list created in the 'settings' menu appears here, the amenity items relevant to a given apartment can be ticked.

Exactly what items are available in a given apartment from among the items saved in the inventory can be selected at the given item.

As the amenity items already bear a bar-code, adding them to the apartment can be performed using a bar-code reader.

Description:

Free text can be uploaded to here, the text can be formatted.

Photos:

Photo gallery with captions

Layout plans:

File gallery with designations

Marketing, financial data:

- Rental fee - advertised
- Common costs
- Status – THE ROLES OF STATUSES ARE TO BE DISCUSSED, and what can be automated, linked to specific events, or at least verified (e.g. if a valid rental contract is in force for the given apartment, then it should not bear the status 'available')

Utilities:

The meters available in an apartment can be recorded here.

This is a list with freely added elements, the types of elements can be selected from the 'utilities' list created under the 'settings' menu. The same can be added multiple times.

The below information can be saved for all the items created:

- name (e.g. cold-water meter 2.)
- type
- serial number
- consumer ID
- remarks

Contracts:

All the contracts created for a given apartment can be seen here.
The list of course can be filtered, searched

Two types of contracts are to be distinguished here:

- The company rents the property from the owner
- Tenant rents the property from a company

New contracts can be added here as well.

- contract number: partly generated, sub-line number can be manually provided
- Apartment number
- adding client or owner (or selecting if already available in the system):
the client added here will appear in the 'clients' menu item.
 - company/private individual
 - name
 - maiden name
 - date of birth
 - place of birth
 - tax number
 - ID number
 - mother's name
 - address
 - bank account number
 - bank
 - phone number
 - email address

Or

- name of company
- seat
- company registration number
- tax number
- bank account number
- bank
- name of official representative
- phone number of representative
- email address of representative
- beginning of contract
- date of handover
- contractual period: indefinite or fixed-term, expiration date in case of the latter
- rental fee
- security deposit
- remarks
- uploading documents – e.g. signed contract
- recording of meter readings
- recording of keys taken over

The above data, I think, should be sufficient to be able to generate a contract in a word format using a template.

Here too, the handover record could be generated, we can do it also in pdf.

- list of pieces of furniture
- initial meter readings
- date of handover
- handover of keys

Finance:

Financial transactions pertaining to the property are managed here (expenditure/income)

1. rental fee – of not own property

A financial batch is created on a pre-determined day of each month, the record will have the below properties:

- Buyer – always the company
- Seller – the owner
- fee: the fee calculated on the basis of the applicable of rental contract
- due date
- status: paid, waiting to be paid
- invoice – may be uploaded

Payment status can be set manually with every item. A summary will appear based on the table.

2. Rental fees

A financial batch is created on a pre-determined day of each month, the record will have the below properties:

- Buyer – the tenant
- Seller – always the company
- fee: calculated on the basis of the applicable rental contract
- due date
- status: paid, waiting to be paid
- invoice – may be uploaded

Payment status can be set manually with every item. A summary will appear based on the table. In the long-run, we may consider having the system automatically issue the invoices via a third-party invoicing software.

3. Utility costs

The common representative sends a record of utility costs for each of the meters. (how the meter readings will be delivered to the common representatives is yet to be

discussed).

Costs can be recorded with the meters, the new financial batch will be generated from these:

- Buyer – the tenant
- Seller - always the company
- fee: sum of fees recorded with the meters
- due date
- status: paid, waiting to be paid
- invoice – may be uploaded

Utilities service providers invoice the company, the company will forward invoice the tenant. Both costs and income will be managed here at the same time.

4. Insurance

The type of insurance covering the property can be recorded here for information purposes only:

- condominium insurance: uploading of the insurance policy
- apartment insurance: coverage period, uploading of insurance policy

5. Other costs

Extraordinary items can always be recorded here:

- date
- designation
- description
- cost
- cost bearer: tenant, owner, company
- status: paid, to be deducted from the deposit

The costs of furniture used at first furnishing will come here too.

6. Reports

Financial queries pertaining only to the selected property can be performed here:

- complete report (costs/income, every item) queries can be performed for a pre-determined period
- accounts receivable
- yield report

EXACTLY WHAT INFORMATION SHOULD BE EXTRACTED IS YET TO BE DEFINED, ANYHOW THIS PART WILL GO THROUGH SIGNIFICANT DEVELOPMENT THROUGH USE AS WELL.

Maintenance works:

List of maintenance works performed in the property, can be filtered, searched

- date
- which apartment
- designation
- description
- costs
- name of manager
- files that may be attached? invoice, anything?
- status

Other remarks:

This is a list of previous remarks, searchable.

Adding new remark:

- subject
- content
- linking with an apartment – not compulsory
- linking with a client – not compulsory
- date - automatic
- recorded - automatic
- responsible person – can be selected from among admin users
- deadline
- status

Reports

Global reports can be prepared under this menu item:

- apartments according to types, broken down according to statuses
- debts
- results
- etc.

This menu item is still quite plastic

Templates

Downloadable document list, different types of frequently used document templates can be uploaded here.

Notifications

Notification emails can be sent to contractual partners through this interface.

Addressees can be filtered according to:

- contracted tenants
- projects
- expiring contracts
- payment defaults

The text of the email can be drafted on the interface and sent either at a pre-set date and time, or immediately.

Notifications sent earlier will be listed as well, according to date.

Dashboard and functions, automated processes

When entering the application, a summary window appears with the following information:

- to do
- due invoices
- outstanding invoices
- invoices expiring within 60 days
- maintenance works
- annual inspections
- expiring insurance policies

LET US THINK OVER WHAT USEFUL INFORMATION MAY BE NEEDED HERE, WHO CAN SEE WHAT CAN BE DEPENDENT ON AUTHORIZATION LEVELS.

The system can perform scheduled tasks, i.e. payment requests for outstanding invoices can be sent out automatically. Let us also revise what tasks could be automated.

- expiring contracts
- payment notifications
- etc.

Mobile Application

Which can be used by the tenants to update data/order technician and more to be discussed.

Application must support both iOS and Android, allow taking photos and upload to the tenant account, receive notifications regarding arrival of personnel, due dates for payments etc.