



# Realty Management Software

03.15.2020

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Kannan Rajan

## Overview

Build a new software for Realty Management

## High Level Requirements

1. New Portal for Tenant Management
2. Manage Properties (Support multi-layer Company Structure)
3. Property Manager portal
4. Owner/Landlord Portal
5. Build Workflow between -(Tenant - Property Manager - Landlord) - 3 way communication. **<Suresh> Supplier should be included in this work-flow.**
6. Notification to all parties involved (**Restricted notifications to tenant and service providers**)
7. Build IOS and Android apps
8. Dynamic Content website - company wise Display
9. Reporting - Property, Property Manager, owner **and investor (once reviewed and published)**
10. Banking Integration(which will give cash forecasting)
11. Accounting
12. Investor Relations

## Detailed Requirements

### Tenant Management

1. New Tenant Registration
  - a. User management (create/edit/delete account, store personal information)
  - b. Apply for a home/unit
  - c. Agreement

- d. Repair/Issue management - create/edit/view/status

## Property Management

1. Store Property information with Structured manner
  - a. Detailed property information(address, unit info like bed room, bath room etc)
  - b. Provisions to store attachments/Images

Beds	4
Baths	3
Sq. Ft.	1,747
Stories	1.5
Lot Size	759 Sq. Ft.
Style	Single Family Residential
Year Built	1999
Year Renovated	1999
County	Alameda County
APN	099B811506000
Status	Sold
HOA Dues	\$104/month
Community	Maralisa Courtyd
Lot Size	3,759 Sq. Ft.
MLS#	40662303

2. Map Tenant info to unit.

## Property Manager Portal

1. Property Info - which is individual or Company owned properties It should login based on configuration. If my Role is property manager then this page should load as Manager self serviced
2. As a manager i would like to generate property reports, financial reports
3. Search option for search issue, invoice vendor, property.....
4. Issue/Repair/Maintenance management - create/edit/view issue on behalf of property and sent to owner for approval
  - a. Types of issues - Roof, Basement, Dry wall, Plumbing like that
  - b. Collect as much as info from the property manager

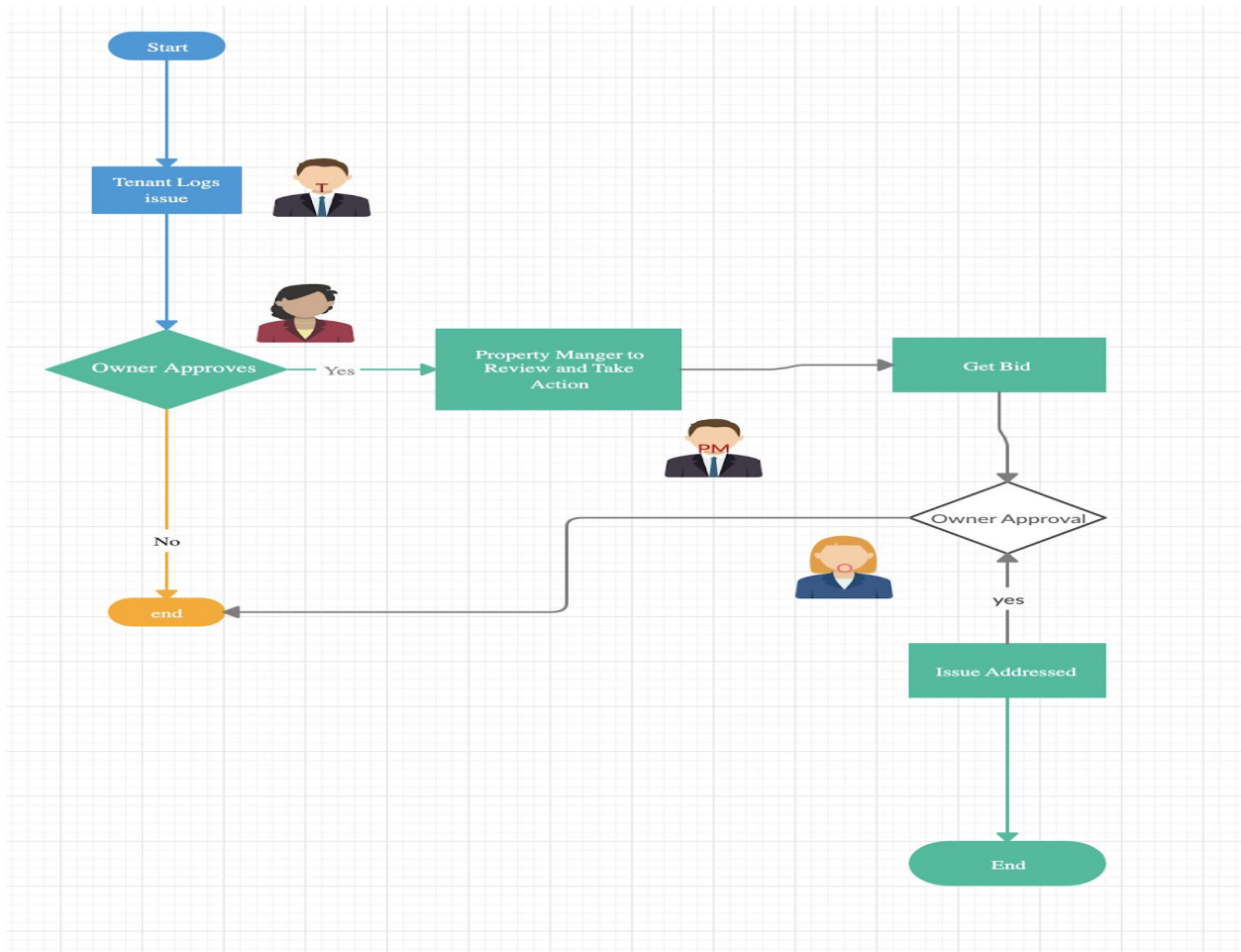
- c. Provision to attach images
  - d. Possible bids for repair
  - e. Provision to store vendors and their contact info.
- 5. Invoice Management - create/edit/view invoice for an issue and send to owner for approval

## Owner Portal/Management

1. Owner Info - which is individual or Company owned properties It should login based on configuration. If my Role is as owner then this page should load as owner self serviced
2. As a owner i would like to generate property reports, financial reports
3. Search option for search issue, invoice vendor, property.....
4. Approval Management - Inbox

## Workflow Issue Management

1. Tenant logs the calls through mobile apps. Both Property Manager and Landlord should be notified.
2. Property Manager (PM) reviews and updates the required and appropriate details after talking to the tenant to understand the issue. Landlords should be notified of the changes made by the PM.
3. PM reaches out to the Service Provider (SP) to get the quote/estimate. If the service provided onboarded, they should get a notification to provide the estimate and attach the quote (if required). If not, the PM reaches out to SP and attach the estimate/quote. Landlords should be notified of the changes made either by the PM or SP.
4. PM reviews the estimate/quote and may ask questions/clarifications with SP. Once all clarified and finalized, PM formally submits to Landlord for approval
5. Landlord may ask questions to the PM before approving.
6. PM questions/communications to SP and Landlord questions/communications to PM all should be logged
7. Landlord approves once all clarified/got the answers from PM
8. PM awards the work to SP
9. SP submits the final invoice either directly to the portal (if onboarded) or forward to PM and PM uploads to the portal.
10. PM should get the confirmation with the tenant and ratings of the SP
11. Close the ticket and charge the amount Landlord



## Notifications

1. Owner
  - a. Receives notification for any issue creation or Bid submission or invoice creation
2. Tenant
  - a. Receives notification any update on the issue
3. Property Manager
  - a. Receives notification for any approvals from owner, issue or invoice

## IOS/Android Apps

## Financial Reporting

## Accounting



## Banking Integration

### Milestones

- I. Long Term
- II. Short Term

### Technical Requirements




Discussions


## property Manage

- ① Signin, Login
- ② Add properties
- ③ Link Owner to the property
- ④ Add Service provider
- ⑤ Add Tenant → Link property
- ⑥ Receive problems
- ⑦ Take Action (Upon Owner Approval)
- ⑧ Assign SP
- ⑨ Get the Quotes from SP
- ⑩ Send the Quotes to owner for Approval
- ⑪ Get & Take Action upon Owner Approval
- ⑫ Notify Tenant & Owner → Completion.



## Ideas



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[For Sale](#)
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[Lease Comps](#)
[Tenants](#)
[Analytics](#)
[Lease Analysis](#)

### BALTIMORE

**Orangetheory Fitness Inks Deal at Hanover Cross Street Apartments**

**Pier 1's Closure of Its Aberdeen Distribution Center Could Be the Beginning of a Trend in Baltimore**

**Merritt Properties Snaps Up Howard County Office Park for \$23 Million**

**Holland Properties Breaks Ground on Lakeside Center Near Baltimore**

**True North Management Puts Calverton Tower on the Market in Maryland**

### MORE NEWS


**Chicago's Iconic Skyscraper Willis Tower Goes Dark**

**Hospitality REIT to Put 'Anything and Everything on the Table' to Deleverage**

**Workplace Garages May Be the New Coronavirus Screening Site**

**Facebook Begins Shift to Permanent Work-From-Home Model for Majority of Workforce**

**Victoria's Secret Parent to Close 250 Stores**




### Arizona's \$12 Billion Semiconductor Factory Plan Gets Caught Up in Trade and Political Issues

BY RANDYL DRUMMER










The microchip facility proposal underscores the relationship between commercial real estate development projects and promises made by governments to provide tax breaks and other subsidies to lure companies.

### Distressed Sales From Pandemic Could Exceed Volume of Great Recession

A base forecast provided by Oxford Economics estimates deals totaling \$146 billion in 2021 and 2022.



### TRENDING

1. Self-Storage Properties, Often Cited as Slump Resistant, Aren't Immune to the Coronavirus 
2. Tesla Reportedly Picks Two Finalist US Locations for Latest Major Factory 
3. Outlook for US Hotels This Year Worsens, Led by Luxury Properties 
4. Meet the Tech Startups Creating the Workplace of the COVID Era 
5. California Edges Closer to Restarting One of World's Biggest Economies 
6. Online Grocery Orders Accelerate Demand for Two Types of Logistics Space 
7. Starbucks Seeks Landlord Concessions for Pandemic Recovery 
8. Slate Office of Toronto Walks Away From Multimillion-Dollar Deal in Florida 
9. Office Depot Plans Major Restructuring That Includes Closing 



Residential



Commercial



Affordable



Self Storage



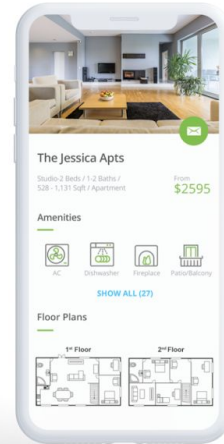
Condos/HOA



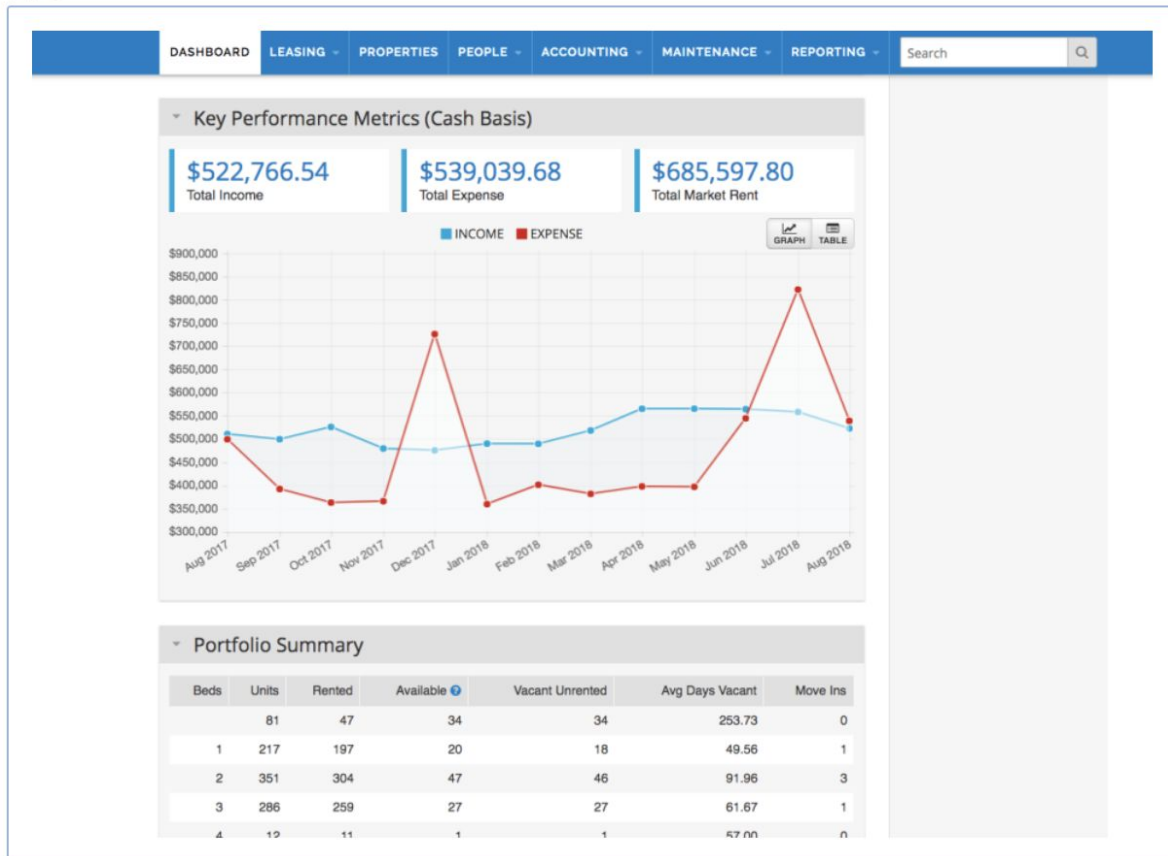
Manufactured Housing

See why **thousands of businesses**  
have switched to Yardi Breeze

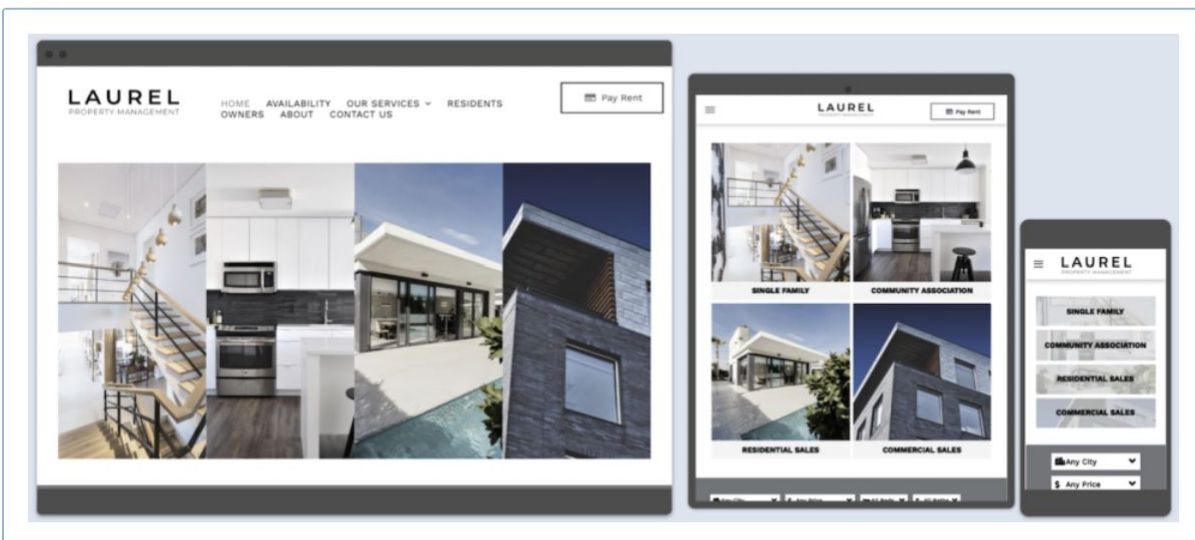
- ✓ Do more with a marketing and operations platform that's easy to use from anywhere
- ✓ Enjoy fast setup and expert chat support when you need it
- ✓ Manage your books with built-in accounting you can trust
- ✓ Empower tenants to pay rent, sign leases and submit maintenance requests online



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# Rental Application

**Interwest Management**  
☎ (805) 555-1212



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## Before you begin:


Please be prepared to pay the application fee as outlined in the property listing. In addition to this rental application, you will also be required to provide a copy of a valid form of identification and proof of income.

To complete this rental application, you must be prepared to provide 3 years of residential history as well as contact information for your rental references. You will also be asked to provide information on your monthly income, and please note that most properties require that applicant combined gross income is at least three (3) times the monthly rent amount.

Each resident over the age of 18 must submit a separate rental application.

**Application fee: \$50.00**

- Before you begin
- Your contact info
- Where you've lived
- Your housemates
- Personal information
- Your income
- Questions
- Attach documents
- Pay application fee
- Review and confirm




## You are applying to rent:


3434 Crown Point Drive  
San Diego, CA 92109

**Desired Move-in**

[Get Started](#)



All information is confidential and will not be shared.  
See our [privacy policy](#) for more details.

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THE PORTAL OF  
Marc Duncan

Home

Payments

Maintenance

Shared Documents


Property Info

Account Profile

Help

Home

# Home

 You are prequalified for Roost Renters Insurance. [Get your quote today!](#)

Your Current Balance

\$1,500.00

Next bill due on September 01, 2018

Pay Now

Set Up Autopay

September (Next Month)

Description	Amount
Tenant Liability Insurance Due on 09/01/2018	\$9.50
Rent Due on 09/01/2018	\$1,500.00
Your Credits & Prepayments	-\$9.50


Address

1234 AppFolio - 2J - David Smith  
Goleta, CA 93117

Maintenance Requests

Request Maintenance

You currently do not have any open maintenance requests.

Renters Insurance by 

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### RentMatch Comparison

Compare this to similar units in AppFolio's customer database that are nearby. [Learn more.](#)

#### Comparison Profile



**This Unit**  
SFR Test

Beds	Baths	Sq. Ft.	Location	Market Rent
2	1.0	750.0	Downtown	\$900.00



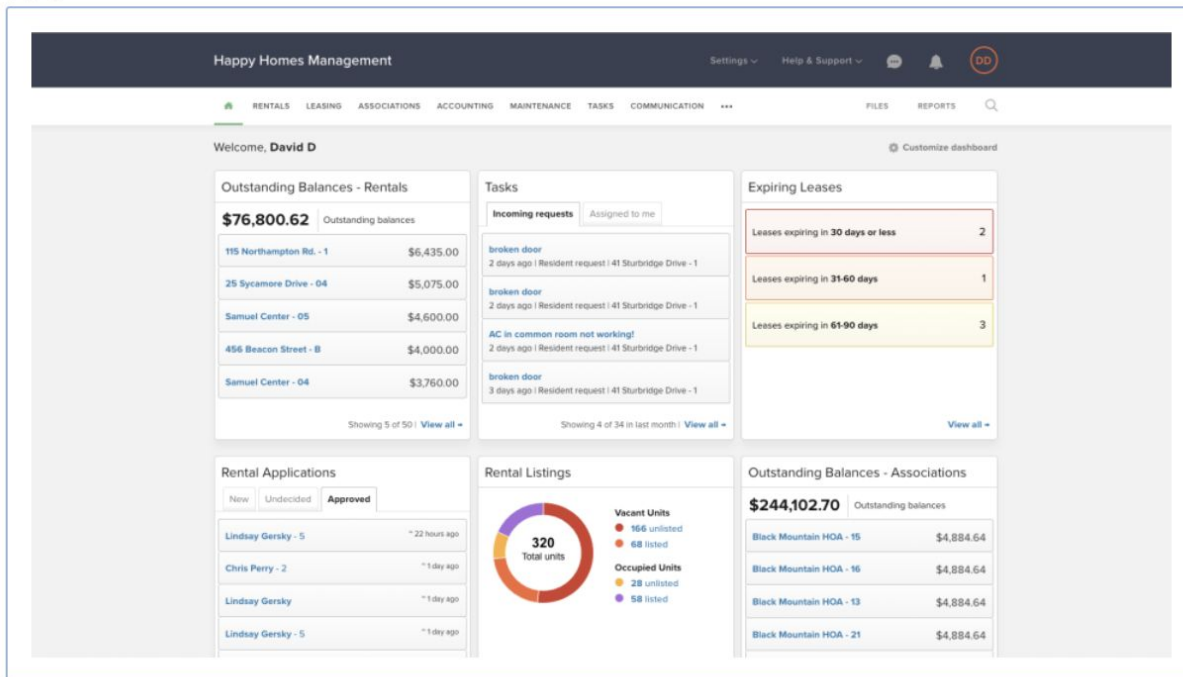
Median: \$975 - \$1000

Rent distribution among the top 25 similar units in your area

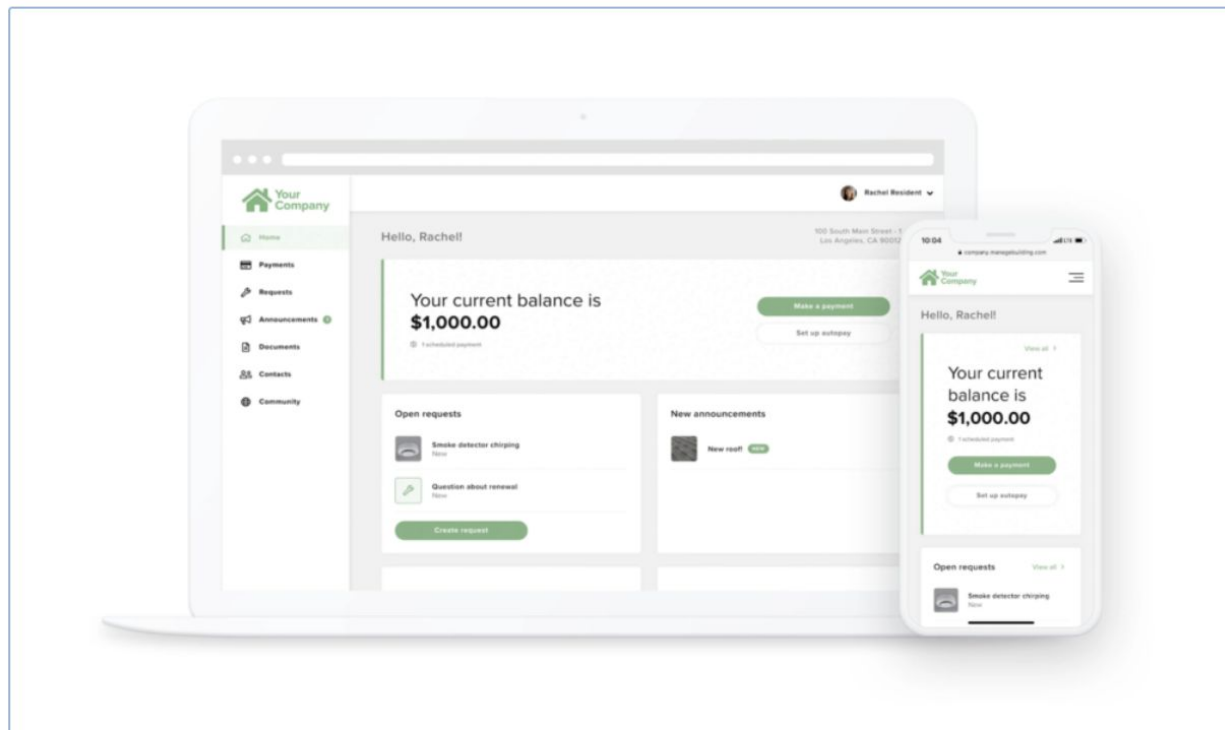
- ✓ Billing & Invoicing
- ✓ Commercial Properties
- ✓ Contact Management
- ✓ Credit Check
- ✓ Expense Management
- ✓ Insurance Management
- ✓ Landlord Database
- ✓ Late Fee Calculation
- ✓ Lease Tracking
- ✓ Maintenance Management
- ✓ Owner Portal
- ✓ Payment Processing
- ✓ Portfolio Management
- ✓ Rent Tracking
- ✓ Residential Property Management
- ✓ Tax Management
- ✓ Tenant Portal
- ✓ Tenant Tracking
- ✓ Vacancy Tracking
- ✓ Website Management



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**Draft lease details**

**Preview and send lease documents**

Preview the documents below and click send.

If you have not placed signature fields on your template, follow the steps below:

1. Select a signer using the "Select Participant" dropdown below. [View signers](#)
2. Click and drag to place the signature fields for that participant.

Field Templates  Relative to Page ☐ Navigate to...

**RENTAL LEASE AGREEMENT**

Owner: Karna Nelson  
 Property Manager: Happy Homes Management  
 Address: 111 Cherry Street  
 City: San Francisco, CA  
 Zip: 94102

Tenant: Trevor  
 Tenant Email: trevor@happyhomes.com

The words "we", "us", and "our" mean "we" and "us" in this lease. "we" in this lease means the Landlord and "us" in this lease means the Tenant and "our" in this lease means the Landlord and the Tenant.

We agree to rent to you, and you agree to rent from us the apartment located at:

Property Address: 111 Cherry Street  
 Security Deposit: \$1,000.00  
 Pet Deposit: \$2,000.00

Print: 10/10/2019

**RECIPIENTS**  
 bbbbbb@buddum.com (Signer)

**Signature Fields**

Signature  
 Initials  
 Signature Block  
 Stamp

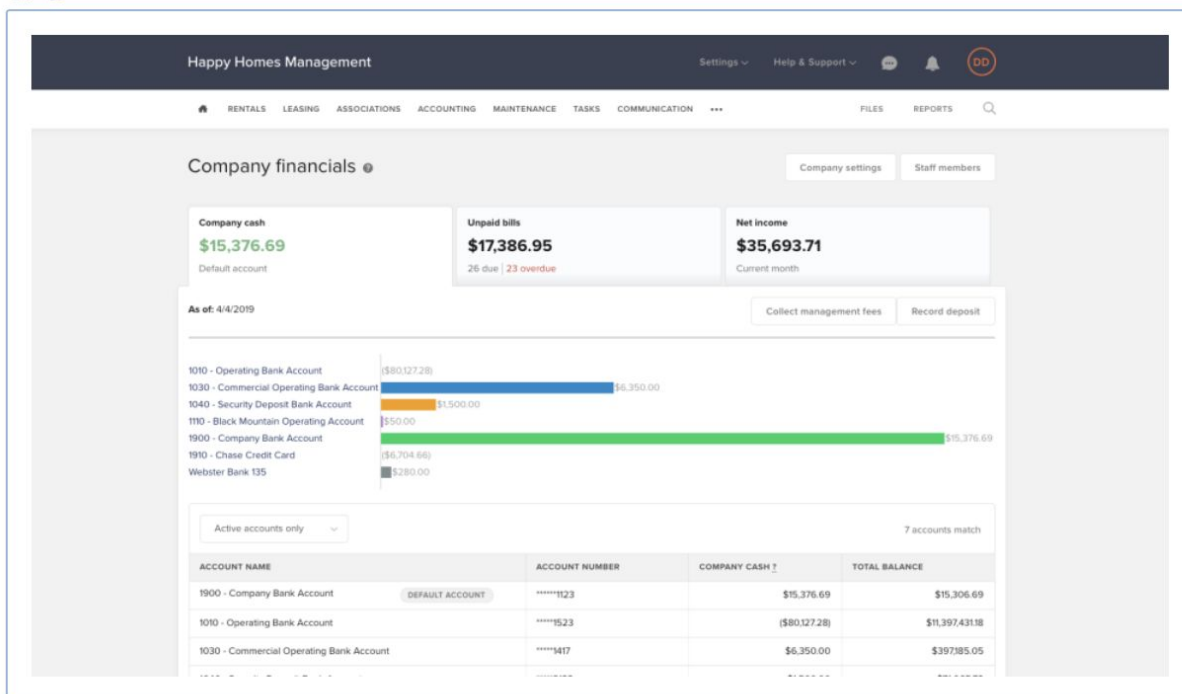
**Signer Info Fields**

**Data Fields**

☐ Save to document library


**Send**  
 Reset Fields

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- Home
- Payments
- Requests
- Announcements 1
- Violations 4**
- Documents
- Contacts
- Community

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- Reports
- Financials


POWERED BY  
Buildium

### < Violation

#### High grass

Lawn has not been cut in months

① **Required actions:** You need to mow your lawn!



#### Details

Stage  
Owner resolved

Violation date  
1/29/19

Privacy Policy / Terms of Service  
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# ResMan

Search

Personal Accounts Property Accounting Reporting Tools Admin

Invoices
-
+

**City of Plan...** LT-5-08

Invoice Date 5/1/2016

Accounting Date 5/1/2016

Amount 2,300.00

**Impact Floors** LT-5-20

Invoice Date 5/3/2016

Accounting Date 5/3/2016


Amount 1,630.00

**Reliant Ener...** LT-5-26

Invoice Date 5/3/2016

Accounting Date 5/3/2016

Amount 2,320.00



**APPLIANCE WAREHOUSE**  
*Convenience Delivered*

APPLIANCE WAREHOUSE of AMERICA, Inc.  
3201 W. Royal Lane, Suite 100  
IRVING, TX 75063  
1-800-693-4343 1-800-643-2301

REMIT TO: APPLIANCE WAREHOUSE of AMERICA, Inc.  
Lockbox 847696  
DALLAS, TX 75284

Invoice Number: 7055219  
Invoice Date: 05/01/2008  
Due Date: 05/21/2008  
Account Number: 306800

TO: SEQUOIA (PUR) AT STONEBRIAR  
5200 TOWN & COUNTRY  
FRISCO, TX 75034

Payment of this invoice indicates acceptance of installed equipment.

PURCHASE	INSTALL	Quantity	Amount	Total
PURCHASE - 2 UNITS MISSING FROM 98446		1	\$150.00	\$150.00
APT 7177 WASH CH1557318				
APT 7177 DRY MO303212				
<b>Sub-Total for PURCHASE</b>			<b>\$150.00</b>	
<b>SALES TAX</b>				

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# ResMan

Search

Personal Accounts Property Accounting Reporting Tools Admin

**Charge Distribution**

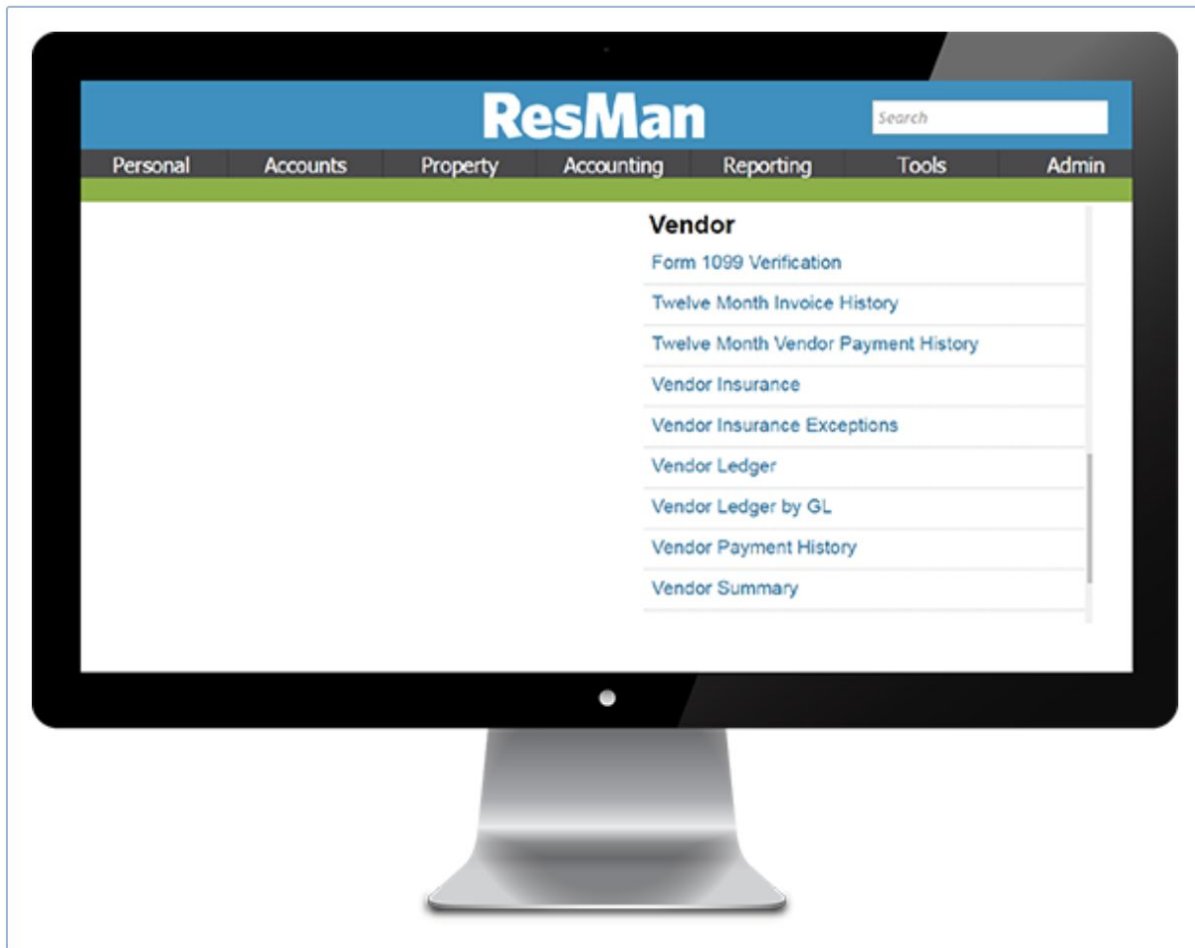
Setup
Preview
Post

Preview

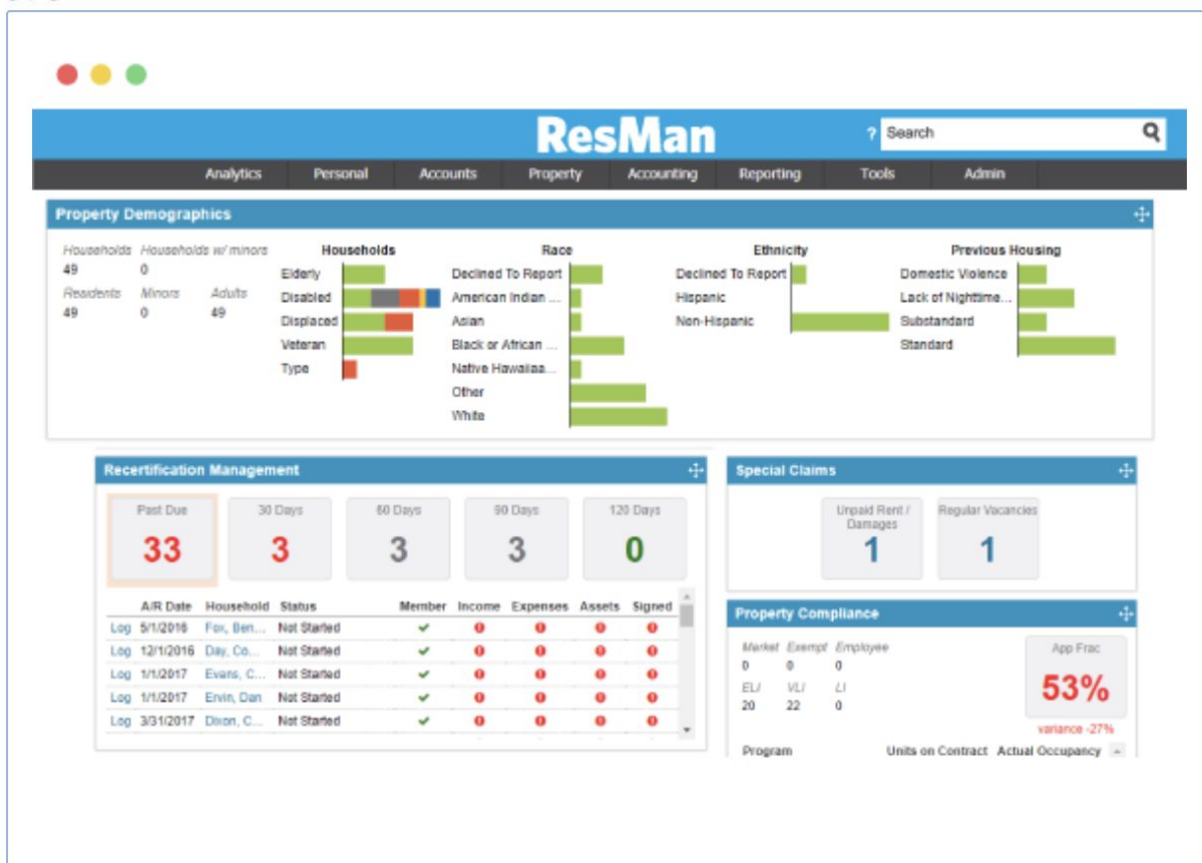
Listed below are the charges that will be posted to each account. To change the charge for a given category, click the amount and type in the new amount. Clicking the "X" that appears next to a charge will waive the charge for the corresponding resident(s). Yellow cells represent a changed charge amount. Grey cells represent a waived charge.

Unit	Residents	Electric
13001	Bob Acosta, Mary Acosta	94.96
13002	Bill Arroyo, Vanessa Arroyo	70.69
13003	Hannah Murphy	46.42
13004	Mason Griffiths	46.42
13005	Connor Davis	46.42
13006	Jose Knight	46.42
13007	Adam Wright	46.42
13008	Cara Casey	46.42
13009	John Barker	46.42
13010	Kelly Rhodes	46.42

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Properties ▾
Worksheet ▾
Tenants ▾
Owners ▾
Vendors ▾
Banks ▾
Tasks ▾
Reports

Add Property View: 322 Main St ▾

 **Get paid on time!** [Setup Online Rent Payments](#) to collect rent from your tenant's bank account for as low as \$1/month!

INCOME			◀ Sep 2018	OCT 2018	Nov 2018 ▶
Chris Williams	Unit 1	Paid	<u>550.00</u>	<u>550.00</u> 	<u>0.00</u>
Susan Johnson	Unit 2	Paid	<u>550.00</u>	<u>550.00</u>	<u>0.00</u>
Bob Michaels	Unit 3	Overdue	<u>550.00</u>	<u>0.00</u>	<u>0.00</u>

Income: [Customize Worksheet](#) | [Manage Tenants](#) | [Make Owner Contribution](#) | [Add Another Tenant](#)

EXPENSE			
Gas and Electric	<u>30.00</u>	<u>30.00</u>	<u>0.00</u>
Garbage Collection	<u>45.00</u>	<u>45.00</u>	<u>0.00</u>
Gardener	<u>30.00</u>	<u>30.00</u>	<u>0.00</u>
Property Management Fee	<u>165.00</u>	<u>110.00</u>	<u>0.00</u>

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**Tenant Center**

View: 4587 Lilac St

View: All Tenants

Tenant Actions: [Add Another Tenant](#) | [View Tenant Balance History](#) | [View Tenant Communication History](#)

Bulk Tenant Actions: [Create Late Fee Due](#) | [Generate Late Rent Notices](#) | [Generate Rent Receipts](#) | [Generate Lease Renewals](#) | [Print/Email Letter](#) | [Setup Tenant Portal](#) | [Setup Rent Reminders](#) | [Configure Default Lease](#)

Tenants [Collapse](#)

Rent Status

▼ 4587 Lilac St

Active Tenants

Rachel Pen	Unit 1	<a href="#">Online Payments</a>	\$1500.00 Due on 02/01/2017	Take Actions ▼
Penelope Rane	Unit 2	<a href="#">Online Payments</a>	\$1500.00 Due on 02/01/2017	Take Actions ▼
Bill Roberts	Unit 3	<a href="#">Online Payments</a>	\$1500.00 Due on 02/01/2017	Take Actions ▼
Jack Smith	Unit 4	<a href="#">Online Payments</a>	\$1500.00 Due on 02/01/2017	Take Actions ▼

[View Tenant Balance History](#)  
[View Tenant Communication History](#)  
[Setup Online Rent Payment](#)  
[Setup Tenant Portal](#)  
[Tenant Communication](#) ▶  
[Tenant Moved Out](#)  
[Edit Tenant Info](#)

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Online Payment
Documents
Tasks

Manage Online Payment

NEXT SCHEDULED WITHDRAWAL
Amount
02/01/2017
Skip Next Auto Rent Payment
Stop Auto Rent Payment
\$580.00

MAKE ONE TIME PAYMENT
Date
01/23/2017
Amount \$
0.00
Payment Method
Payment from Bank Account xxxxx 1234
Make One Time Payment →
(Continue to next step)

RECENT PAYMENT HISTORY

Processed Date	Withdraw Date	Deposit Date	Amount Withdrawn
12/30/2016	01/03/2017	01/06/2017	\$580.00
11/30/2016	12/01/2016	12/06/2016	\$580.00
10/31/2016	11/01/2016	11/04/2016	\$580.00

YOUR DETAILS
Rachel Pen
4587 Lilac St
Las Vegas Nevada
Email
rachel\_pen123
Phone
(123) 111-1234

LEASE DETAILS
Fixed Term
10/25/2012 - 10/31/2013  
(goes month to month after lease ends)
Rent Payment
\$580.00 Monthly
Due Date
1st of the Month
Security Deposit
\$900.00
Security Deposit Paid
\$900.00
Security Deposit Balance
\$0.00
Opening Balance
Late Fee
\$100.00 per rent period
Bounce Check Fee
\$75.00
Landlord
Company A
8622 Main St
Las Vegas Nevada
bobcook@123propertiesllc.com



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### Calendar

Property:  Task for:  Select Status:

Actions: [Add Task](#)

< > Today **January 2017** Month Week Day

Sun	Mon	Tue	Wed	Thu	Fri	Sat
1	2	3	4	5	6	7
					11:00am Window Repair	
8	9	10	11	12	13	14
		2:00pm Fix Plumbing Upstairs				
15	16	17	18	19	20	21
			4:00pm Fix Door			
22	23	24	25	26	27	28
			10:00am Water Heater Repair			
29	30	31	1	2	3	4
	3:00pm Caulk Bathtub					

**INCOME AND EXPENSE**

- ▶ [Income & Expense Report](#)
- ▶ [Transaction by Category Report](#)

**TENANTS**

- ▶ [Rent Roll Report](#)
- ▶ [Tenant Late Rent Report](#)
- ▶ [Tenant Payment Report](#)
- ▶ [Tenant Contact Report](#)
- ▶ [Security Deposit Collection Report](#)
- ▶ [Tenant Online Rent Collection Report](#)
- ▶ [Tenant Online Rent Status Report](#)

**PROPERTY MANAGERS**

- ▶ [Owner Statement](#)
- ▶ [Property Owner Contact Report](#)

**VENDORS**

- ▶ [Vendor Balance Report](#)
- ▶ [Vendor Contact Report](#)

**BANK REPORTS**

- ▶ [Bank Activity Summary](#)
- ▶ [Bank Reconciliation Report](#)



**TASK**

- ▶ [Task Report](#)

**TRUST REPORTS**

- ▶ [Columnar Record of Bank Funds](#)
- ▶ [Columnar Record of Client Funds](#)
- ▶ [Columnar Record of Property Funds](#)

**TAX REPORTS**

- ▶ [Tax Report & Schedule E](#)
- ▶  [1099 Report](#)
- ▶  [1096 Report](#)

**PRINT ADDRESS LABELS**

- ▶ [Print Address Labels](#)

**DATA EXPORT**

- ▶ [QuickBooks Export](#)
- ▶  [Export Transaction to Excel](#)