

Technical Document – Annexure I of Lease Management Platform

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Annexure I

1. Project Overview

✓ Business Need

Client needs a platform where landlords can create and manage their leases and tenants can view their active lease. Landlord should have option to create the leases individually or upload in bulk with all the details as per the form. Admin shall have option to manage the platform from backend.

✓ Solution Suggested

We will create a web app for Landlords where they can create the lease by filling out the form with all the details (The form will be in stepper format). Landlords can send notice to the tenants. Tenants can see the lease shared with them by Landlords along with all the details and they will also be notified for end date of the lease and upcoming rent date. Admin can manage leases, see dashboard, manage tenants, manage Landlords, manage reports, and manage notifications from the backend.

✓ Stakeholders

Actor	Task
Tenant	Tenant can see the lease shared with them.
Landlord	Landlords can create Lease, and can send notice to their tenants.
Admin	Admin can manage leases, see dashboard, manage tenants, manage Landlords, manage reports, and manage notifications from the backend.

✓ Project Scope and Development Deliverables

This project scope comprises of the following components to deliver:

- Design and Development of Mobile Application for Tenants (iOS & Android)
- Development and Integration of API
- Development of Landlord Web App
- Development of Admin Web Panel

2. Technologies

Development Phases		Tools & Technology
Requirement Gathering and Analysis	Proposal Drafting, SRS Writing and User Flow Diagram	Microsoft Office Word 2019 / Microsoft Office Presentation 2019 / Microsoft Office Vision 2019
	Wire Framing	Axure / UiZard
Development	Application	Flutter / React Native
	Web Backend	Node.js / PHP (Laravel)
	Database	MongoDB / MySql
Version/s Supported	Android	9.0 and above
	iOS	13.0 and above
	Browser	Google Chrome, Safari, Mozilla Firefox
Quality Assurance & Testing	Test Cases	MS Office Excel 2019
	Testing	Manual

3. Features and Scope of Work

3.1. User Flow for Tenant Mobile App

➤ Splash Screen

- The launch screen of the Application where end tenants will be able to view the app's logo.

➤ Walkthrough Screen

- Tenant will be able to view 3-4 walkthrough screens, which will be helpful for the tenant to have an idea about the app.

➤ Authentication

• Sign In

- The Tenant will be able to login into the application using the below details:

- Email ID
- Password

- **Forgot Password**

- Clicking on this tenant would be redirected to the Forgot Password screen where tenant need to enter the below details:-

- Email ID (To receive the OTP for verification).
- OTP
- After the OTP is verified tenant would be asked to mention below details in order to change the password:-
 - New Password
 - Confirm New Password

• Social Media Sign Up

- The Tenant will be able to sign up/sign in into the platform with social media accounts more specifically with Google and Meta (Facebook). For the same they will be asked to provide their consent and agree to

the “Privacy Policy and T&C of use” of Google and Meta (Facebook) respectively.

- **Sign Up**

- The Tenant will be able to login into the application using the below details:
 - **Full Name**
 - **E-mail ID**
 - **Email ID** will be verified with the help of OTP
 - **Mobile Number**
 - **Create Password**
 - **Confirm Password**

➤ **Home Screen**

- **Top Bar**

- App Icon
- Notification Icon

- **Body**

- Tenant can see all the lease here.
- Next date for rent.
- Lease ending date

- **Bottom Bar**

- Home
- My Lease
- My Account

➤ **Lease Details**

- Lease details will appear with the following details:
 - Lease ID
 - Landlords/s Name
 - Property Details
 - Rules and Regulations
 - Rent Amount

- TMI (Tax, Maintenance and Insurance)
- Other Expenses
- Next date for rent
- Lease ending on
- Signatures of Tenant (Tenants will have option to upload their signature image here)
- Signatures of Landlords
- Reminder for payment
 - A message for Rent reminder will appear on every lease detail page, with YES/NO option.
 - On-click of YES a notification will be sent to the landlord with the following details
 - Message - Rent Received
 - Tenant Name
 - Confirm (Button).
- Tenants can rename their lease title as per their convenience for reference.

➤ **Notifications**

- Tenant will receive push and in app notifications for
 - Changes made in the lease by Landlords.
 - Reminder for upcoming rent date,
 - Reminder for Lease ending date,
 - Notice from the Landlords.
 - Updates or announcement from the admin.
 - Users will receive notifications over email and SMS also

➤ **My Account**

- Tenant will be able to View/Edit their account details.

➤ **Settings**

- Following details will appear in settings:
 - Change Password

- Delete Account
 - Tenant will be able to delete their account from the application.
- Notification Preferences
- Reminder Preference
 - Daily
 - Once a Week
 - Once a Month
- Static Content
 - FAQ
 - Privacy Policy
 - Terms & Conditions
 - About Us

➤ **Logout**

- Tenant will be able to logout of the app, after which they will be redirected to the sign in screen.

3.2. User Flow of Landlord Web Panel

➤ Authentication

- **Sign In**

- The Landlords will be able to login into the web app using the below details:

- Email ID
- Password

- **Forgot Password**

- Clicking on this Landlord will be redirected to the Forgot Password screen where they will be required to enter the following details:-

- Email ID (To receive the OTP for verification).
- OTP
- After the OTP is verified Landlords would be asked to mention below details in order to change the password:-
 - New Password
 - Confirm New Password

- **Sign Up**

- The Landlords will be able to login into the application using the below details:

- **Full Name**
- E-mail ID
 - E-mail ID will be verified with the help of OTP
- Mobile Number
- Create Password
- Confirm Password

➤ Home Screen

- Landlords will be able to view their different properties if they have added, otherwise will have an option to add new property.

- Landlords will be able to view all the lease added by them.
- Add New Lease
- Total Leases created
- Upcoming rent dates
- Leases ending this week.
- Leases ending this month.

➤ **My Properties**

- Landlords will be able to manage their property details from here.
- Landlords will have option to (add/edit/remove) the properties.
- While adding the property landlord will select the type of property for managing the hierarchy
 - Like: Parent property, rentable unit, and non-rental property.
- For every property there will be an Unique ID

➤ **My Lease**

- Landlords will be able to manage their lease for all the properties.
- **Add New Lease**
 - For addition of lease, landlords will have to fill the form of 14 pages.
 - Landlords can add other expenses for the lease like:
 - TMI (Tax, Maintenance and Insurance)
 - Other Expenses
 - Validation of the form needs to be done.
 - For every lease there will be an Unique ID
- **Add New Lease (Bulk Upload)**
 - Landlords can upload lease in Bulk.
There will be a particular format
- **My Lease**
 - Landlords will have option to (Edit/Remove) the lease from here.
 - Send notice to tenant.

- For every update in the lease, a notification will be sent to the tenants and admin.

- **Rent Payment Confirmation**

- Confirmation will appear with the following details:

- Message - Rent Received
 - Tenant Name
 - Close (Button)
 - Confirm (Button).
 - This confirmation will appear

- **Send Notification/Reminders**

- System will provide different kind of notice and reminders for different province to the landlords.

- **Renew a Lease**

- Landlords will have option to renew the lease
 - The lease will open up in edit mode and landlords can change and save the details.

➤ **Reports**

- Following kind of reports will appear on the web app:
- Rent Received
- Overdue Rent
- Expenses by Property
- Rent Forecast

**Landlords will be able to export the reports in pdf or xls format.

➤ **Subscription Plan**

- It will be an annual subscription.
- To create lease Landlords will be required to take subscription of the platform.
- Landlords can add up-to 10 lease after taking subscription.

➤ **Payment Gateway**

- 3rd Party Payment gateway be required for the same.
- Payment method will be Credit/Debit Cards.

➤ **Notification**

- Landlords will receive the notification for the following:
 - When the admin approves the document
 - When the admin Accepts or declines the request of new Lease.
 - Admin Notification.

➤ **My Account**

- Profile: - Landlords will be able to view/edit their name, contact details, change password, Delete account.
 - History: Landlords will be able to view the properties listing
 - Delete Account
 - Landlords will be able to delete their account from the web app.
 - Notification Preferences
 - Reminder Preference
 - Daily
 - Once a Week
 - Once a Month
 - Static Content
 - FAQ
 - About us.
 - Privacy policy
 - Contact us

➤ **Logout**

- Landlords will be able to log out from the Web App, after which they will be redirected to the sign in page.

3.3. Administrator Web Panel

The back end of the platform will be power packed with an administrative panel to manage the updates of data at the application level, website level and as well as back end.

Following would be the key functionalities:

➤ Sign In

- Admin will be able to sign to the web panel with the help of Email ID and Password.
- In case admin forgets the password they can recover it using their email ID.

➤ Dashboard

- Following details will appear on the dashboard:-
 - Total Tenants over the Platform
 - [Total Landlords over the Platform](#)
 - Total Subscriptions Purchased
 - Total Lease Created
 - Total Revenue Generated
- **Sort**
- Admin will have option to sort the dashboard based on:-
 - From-To(date)
 - OR
 - Today
 - This Week
 - This Month
 - This Year

****Dashboard data will appear in form of counts, graphs and charts**

➤ Tenants Management

- Admin will be able to manage the Tenants from the backend.
- Admin will be able search/filter the Tenants profile from the backend.
- Admin will be able to see a list of Tenants in Grid/Tabular format.

- Admin will be able to see the detailed view of the Tenants.
- Admin will be able to (Add/Edit/Delete) the Tenants.
- Admin will be able to activate/deactivate the account of the Tenants from the backend.

➤ **Landlord Management**

- Admin will be able to manage the Landlords from the backend.
- Admin will be able search/filter the Landlords profile from the backend.
- Admin will be able to see a list of Landlords in Grid/Tabular format.
- Admin will be able to see the detailed view of the Landlords.
- Admin will be able to (Add/Edit/Delete) the Landlords.
- Admin will be able to verify the documents uploaded by the Landlords.
- Admin will be able to activate/deactivate the account of the Landlords from the backend.

➤ **Property Management**

- Admin will be able to manage the properties from the backend.
- Admin will be able to (Add/Edit/Delete) the properties.
- There will be a grouping mechanism/hierarchy for the properties.
 - Like: Parent property, rentable unit, and non-rental property.

➤ **Lease Management**

- Admin will be able to view all the lease from the backend.
- Admin will be able to delete the lease from backend.
- Admin will be able to manage (add/edit/remove) the lease form data based on the geography (province).
 - While landlord adds a new lease the form details will appear based on the selected province.

➤ **Subscription Management**

- Admin will be able to manage the subscriptions related the Landlords.

➤ Transaction Management

- Admin will be able to see all the transactions done for purchasing the subscription plan.
- **Sort**
- Admin can sort the transactions based on
 - From-To(Date)
 - OR
 - Today
 - This Week
 - This Month
 - This Year

➤ Reports

- Admin will be able to view reports for the following: -
 - Total Tenants over the Platform
 - [Total Landlords over the Platform](#)
 - Total Subscriptions Purchased
 - Total Lease Created
 - Total Revenue Generated
- **Sort**
- Admin will be able to sort the reports based on: -
 - From-To(Date)
 - OR
 - Today
 - This Week
 - This Month
 - This Year

**Admin will be able to export the report in pdf for xls format.

➤ Content Management

- Admin will be able to generate and manage the Content from the backend.
- Admin will be able to manage the static content from the panel.

➤ Change Password

- Admin will be able to change their password.

➤ Dynamic Notification/Reminder Management

- Admin will be able manage (Add/edit/remove) the notification and reminder based on the geography (province).

➤ Push Notification Management

- Admin will be able to manage the push notification from the backend.
- Admin will be able to send geography based notice and alerts to tenant and Landlords.
- Admin will be able to send the notifications to the tenants and Landlords.

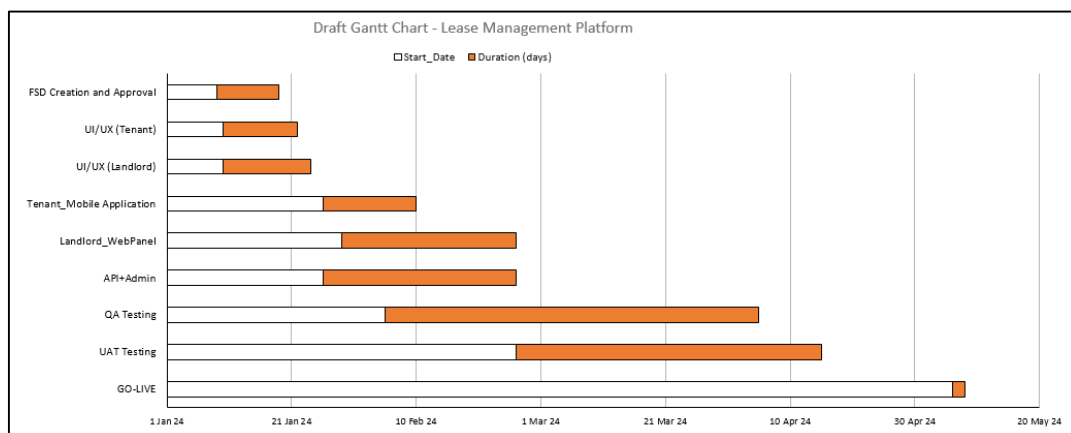
➤ Logout

- Admin will be able logout from the web app, after logout admin will be redirected to the login page.

Note: All the third-party API's that are required in the development would be provided by the Bob.

4. Draft Delivery Timeline and Gantt Chart

Planned Project Start Date	Scheduled Project Completion Date
Project Duration*	100
09-Jan-2024	07-May-2024



*Project Duration would be met with a condition that the client responses are received on time.

5. Project Management

Before Project is awarded			
Business Analysis	Project Management / Software Development	Business Development / Sales	Accounting
1. Project Identify / Analysis	5. Project Evaluation by technical teams	12. Introduction call	19. Invoice submitted to BOB
2. Develop one-page proposal overview	6. Introduction call 1 on 1 interaction with BOB	13. Deliverables discussed with BOB	20. Payment received
3. Create project management overview	7. System appropriate services determined	14. Milestones discussed	21. Payment confirmation sent to BOB
4. BOB assigned to business manager GBM	8. Requirements / System application architecting	15. Project success discussed	22. Account forwarded to PM
<i>GBM: Global Business Manager</i>	9. Project needs analysis	16. Future growth alignment	
	10. Detailed proposal development	17. Detailed proposal provided	
	11. Cost and Time effort estimation	18. Payment instructions	

After Project is awarded			
Phase 1	Phase 2	Phase 3	Phase 4
1. Project manager assigned	6. Design, Development / technical teams assigned	12. Testing / Quality Assurance	16. Periodic project maintenance
2. Project initiation/ introduction call	7. Project start	13. Live server testing	17. Data backups
3. Online project profile created	8. BOB feedback on weekly	14. Final bugs issues fixed	18. Web site – System application upgrades
4. Weekly project meetings scheduled	9. Weekly project feedback session- 30 min	15. Campaign completed	19. On line marketing ** Optional
5. Reporting formats explained to BOB	10. Reports available on-line		
	11. Online Rebel catering access of PM system application		

6. Proposed Team of Project

The proposed team to achieve the deliverables in a time span of 20 Business Weeks comprising of 40 hrs./week is as follows

Designation	Availability
Project Manager	Part Time
Project Expert	Part Time
Designers	Full Time
Developers	Full Time
Quality Analyst	Full Time

