

USER GUIDE

Property Managemet Solution

Odoo v14 Community Edition



SERPENT
CONSULTING SERVICES PVT. LTD.

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Introduction

A web-based system that enables users to search through different types of property based on its availability. It is a system for property owners to put their property up for rent/sale based on their requirements.

With a CRM-enabled system, property managers or management companies will be able to directly contact the customer using the PMS system. It also allows you to contact tenants, manage tenancy with the payment option enabled. We have designed a unique way to handle property assets through which it will be very easy to add a property in the system with multiple photos and videos.

Features



PROPERTY CONFIGURATION:

Add a new property with details including Area, Rent, Occupancy, utilities, nearby Amenities. Add a number of photos and sub-properties. Users can add latitude and longitude of the property to get the location of the property.



TENANCY MANAGEMENT:

Adding tenant details. Add tenancy with deposit and rent schedule with maintenance details on the property. Users can configure the data about depreciation on the property. The manager will be able to invoice and print details of the same.



CRM FUNCTIONALITY:

The application can be generated directly from the property portal, it assists Property Managers to find the requirements of applicants. This allows communication between tenants and property owners using the portal directly. Applications will be shown only to the property management company or owner.



PROPERTY SEARCH:

Visiting users will be able to search property through the portal website using property type, area, Pincode, state, etc. users will be able to check amenities and nearby places for the same using map functionality.



MAINTENANCE MANAGEMENT:

The maintenance module will allow users to create maintenance requests. Admin will be able to create a maintenance team based on property. Users will be notified about request status and invoicing can also be generated using the portal.



REPORTS:

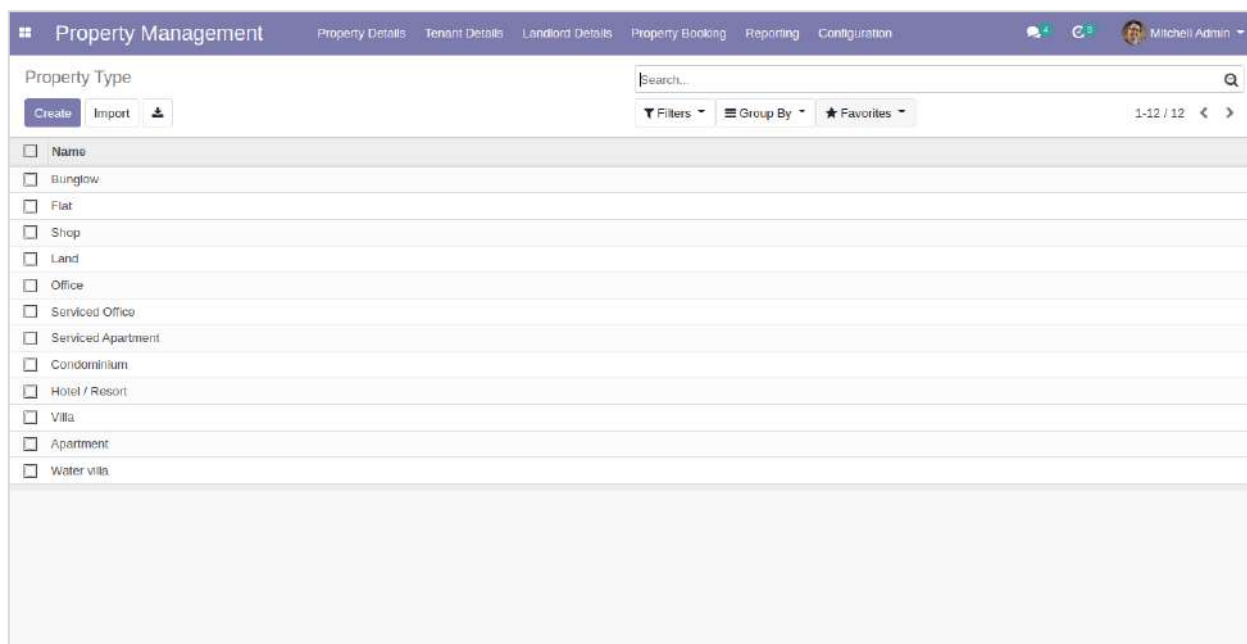
PMS offers different kinds of reports which allow analyzing the property information, tenant details, tenancy contract expiry details, income, and expenditure, property occupancy reports.

Configuration

Configuration details are the master data for the property management solution as these details are necessary for all the property details.

Property Type

In this configuration menu, the user will be able to add property types in the configuration. This type is required when we want to create a property.



The screenshot shows the 'Property Management' application interface. The top navigation bar includes 'Property Details', 'Tenant Details', 'Landlord Details', 'Property Booking', 'Reporting', and 'Configuration'. The 'Configuration' tab is active, and the 'Property Type' sub-tab is selected. The user is logged in as 'Mitchell Admin'. The main area displays a table of property types with a search bar, 'Create', 'Import', and 'Export' buttons, and filters. The table lists various property types, each with a checkbox for selection.

☐	Name
☐	Bungalow
☐	Flat
☐	Shop
☐	Land
☐	Office
☐	Serviced Office
☐	Serviced Apartment
☐	Condominium
☐	Hotel / Resort
☐	Villa
☐	Apartment
☐	Water villa

Rent Type

In this configuration, there are two parts: the first one is the name and the second one is rent type.

Name: Here user will be adding a numeric number of the duration

Type: Here users will add the detail of rent type like weekly, monthly, quarterly, or yearly basis.

Property Management			
Rent Type		Search...	
Create Import		Filters Group By Favorites	
		1-5 / 5	
Name	Rent Type	Sequence	
1	Monthly	1	
3	Monthly	2	
6	Monthly	3	
1	Yearly	4	
1	Weekly	5	

Utility Type

In this configuration type, the user can add all the master utilities of the system. When a user is creating a property he will be able to select these utilities available in the particular property.

Property Management

Property Details

Tenant Details

Landlord Details

Property Booking

Reporting

Configuration

4

3

Mitchell Admin

Utility Type

Create

Import

Search...

Filters

Group By

Favorites

1-13 / 13

Name

Electronics Services

Security Services

Water Services

Garden Services

Gas Connection

Air Conditioner

Electricity

Garden

Garage

House Alarms

Parking

Smoke Alarms

Lift facility

Recurring Maintenance Type

Here in this configuration, the admin will add details of all the maintenance details and those details can be added to the property at the time of the tenancy creation form.

Property Management		
Property Details Tenant Details Landlord Details Property Booking Reporting Configuration 4 8 Mitchell Admin		
Recurring Maintenance Type Create Import Search... Filters Group By Favorites 1-4 / 4		
Maintenance Type	Maintenance Cost	Maintenance Team
☐ Lift	250.00	
☐ Pest Control	250.00	
☐ Plumbing Service	150.00	Maintenance Team 1
☐ Electricity Check Monthly	100.00	Internal Maintenance

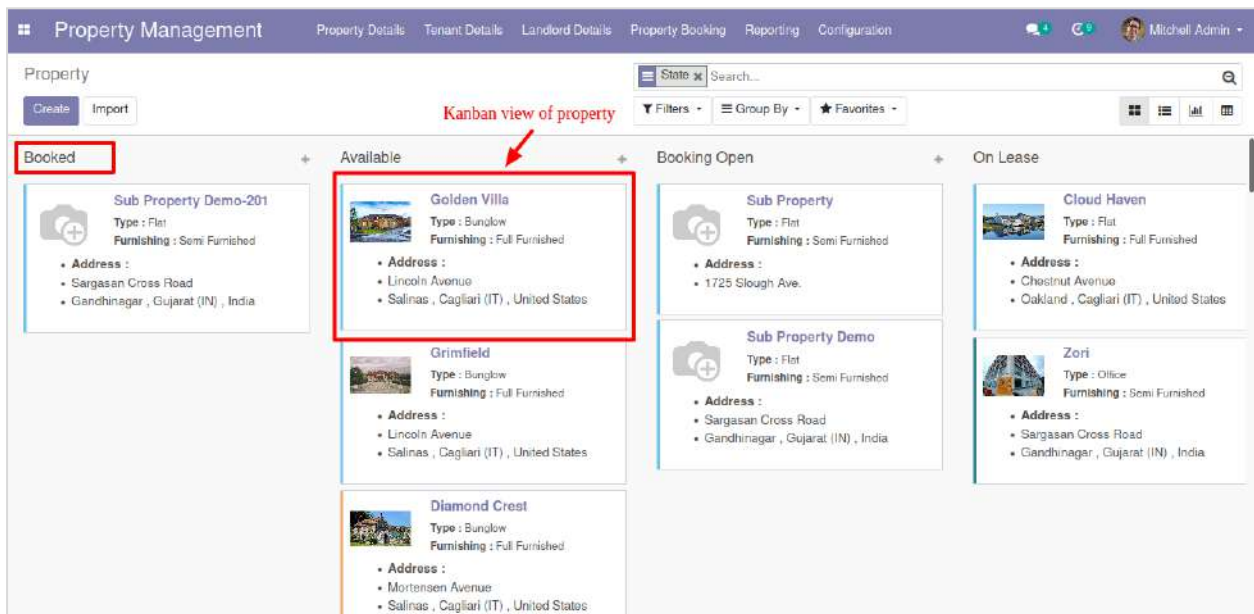
Property Management

With this module, users will be able to add a property with all details and features, some of which are address, floor plans, multiple photos, depreciation details, accounts, utilities, and basic details like bedroom, bathroom, and parking facilities.

Property

Kanban view :

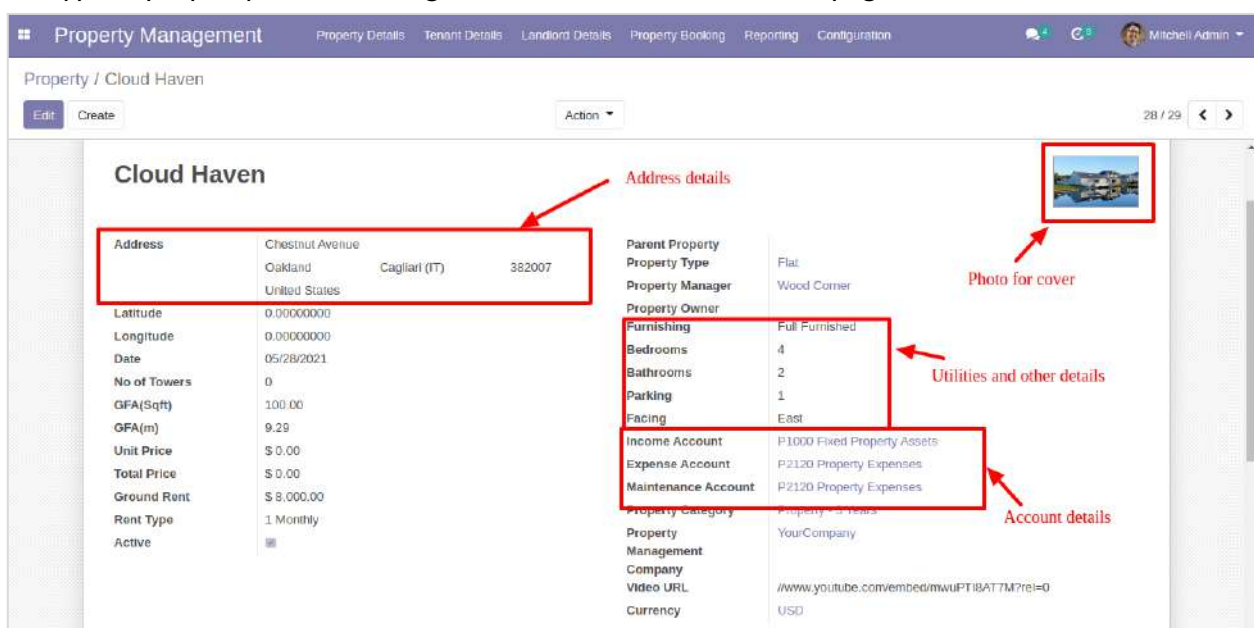
Here there is a kanban view of the property grouped by state with abstract details of the type, address, and furnishing detail.



Property Details :

Here on this page users will be adding the details like address, latitude, longitude, GFA, total price, and rent price with account information for the property.

Utilities and details of Bedroom, Bathroom, Furnishing and property management company with the type of property and its manager details are also added in the page.



General Information:

In this tab, all the value salvation of the property details with depreciation count and the gap between two depreciation are added.

Property Management | Property Details | Tenant Details | Landlord Details | Property Booking | Reporting | Configuration

Property / Cloud Haven

Management Company: [Field]
Video URL: //www.youtube.com/embed/mwuPTi8AT7M?rel=0
Currency: USD

General | Depreciation Board | History | Maintenance | Sub Properties | Occupancy | Rents/Rates & Tenancy | Utility/Insurance & Safety Certificate

Purchase And Sale Details | Nearest Places | Floor Plans, Photos & Documents | Suggested Properties

Gross Value: \$ 15,000.00
Salvage Value: \$ 0.00
Residual Value: \$ 15,000.00

Computation Method: Linear
Time Method: Number of Entries
Prorata Temporis: ☐
Number of Depreciations: 5
Number of Months in a Period: 12

Value salvation details
Selection of depreciation numbers
Period for depreciation in months

Notes

Depreciation Board:

When we create a whole property then the user will be shown a button to create depreciation details, when the user clicks on the show depreciation button the whole depreciation detail is shown as per the below image.

Property Management | Property Details | Tenant Details | Landlord Details | Property Booking | Reporting | Configuration

Property / Cloud Haven

Management Company: [Field]
Video URL: //www.youtube.com/embed/mwuPTi8AT7M?rel=0
Currency: USD

General | Depreciation Board | History | Maintenance | Sub Properties | Occupancy | Rents/Rates & Tenancy | Utility/Insurance & Safety Certificate

Purchase And Sale Details | Nearest Places | Floor Plans, Photos & Documents | Suggested Properties

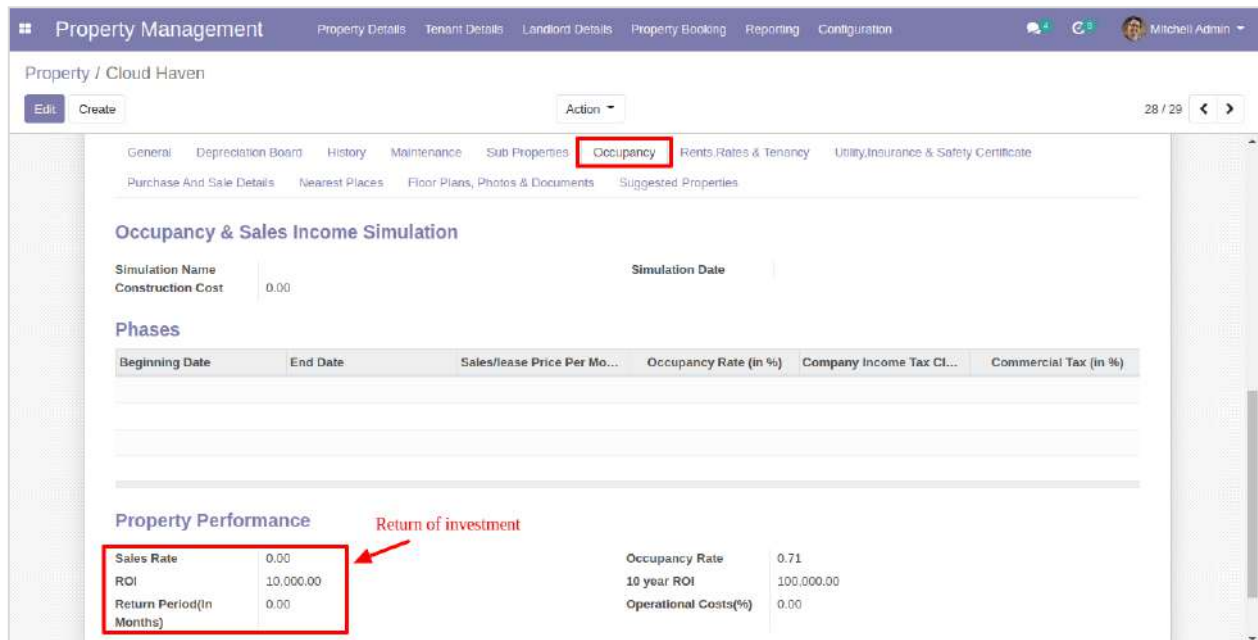
Depreciation Date	Cumulative Depreciation	Current Depreciation	Next Period Depreciation	Linked
05/28/2021	3,000.00	3,000.00	12,000.00	☐
05/28/2022	6,000.00	3,000.00	9,000.00	☐
05/28/2023	9,000.00	3,000.00	6,000.00	☐
05/28/2024	12,000.00	3,000.00	3,000.00	☐
05/28/2025	15,000.00	3,000.00	0.00	☐

* Compute

Notes

Occupancy :

In this tab, the user can add details of the construction cost of the property. Its return on investment and sales rate detail will be directly generated based on its tenancy and sale purchase details.



Property Management | Property Details | Tenant Details | Landlord Details | Property Booking | Reporting | Configuration | Mitchell Admin

Property / Cloud Haven

General | Depreciation Board | History | Maintenance | Sub Properties | **Occupancy** | Rents,Rates & Tenancy | Utility,Insurance & Safety Certificate

Purchase And Sale Details | Nearest Places | Floor Plans, Photos & Documents | Suggested Properties

Occupancy & Sales Income Simulation

Simulation Name: Construction Cost: 0.00 | Simulation Date:

Phases

Beginning Date	End Date	Sales/lease Price Per Mo...	Occupancy Rate (in %)	Company Income Tax Cl...	Commercial Tax (in %)

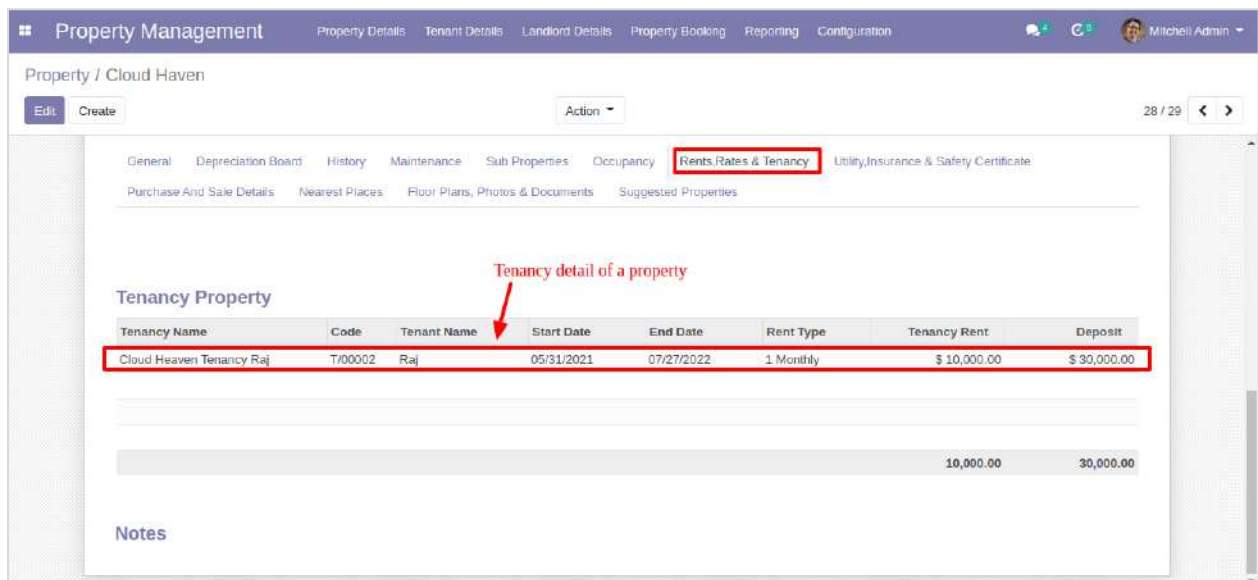
Property Performance

Return of investment

Sales Rate	0.00	Occupancy Rate	0.71
ROI	10,000.00	10 year ROI	100,000.00
Return Period(In Months)	0.00	Operational Costs(%)	0.00

Rents, Rates, and Tenancy :

Here in this tab, all the previous details of tenancy for that property are shown. Its start and end date with rent and deposit details are also shown here.



Property Management | Property Details | Tenant Details | Landlord Details | Property Booking | Reporting | Configuration | Mitchell Admin

Property / Cloud Haven

General | Depreciation Board | History | Maintenance | Sub Properties | Occupancy | **Rents,Rates & Tenancy** | Utility,Insurance & Safety Certificate

Purchase And Sale Details | Nearest Places | Floor Plans, Photos & Documents | Suggested Properties

Tenancy Property

Tenancy detail of a property

Tenancy Name	Code	Tenant Name	Start Date	End Date	Rent Type	Tenancy Rent	Deposit
Cloud Heaven Tenancy Raj	T/00002	Raj	05/31/2021	07/27/2022	1 Monthly	\$ 10,000.00	\$ 30,000.00
						10,000.00	30,000.00

Notes

Utilities, Insurance & Safety Certificate :

In this tab, the user will be able to add Utility details, and certificates can also be uploaded in the same. If there are any safety certificates like fire safety certificates then users can upload that details with documents and their expiry details are also added here only.

Property Management | Property Details | Tenant Details | Landlord Details | Property Booking | Reporting | Configuration | Mitchell Admin

Property / Cloud Haven

General | Depreciation Board | History | Maintenance | Sub Properties | Occupancy | Rents/Rates & Tenancy | **Utility, Insurance & Safety Certificate**

Purchase And Sale Details | Nearest Places | Floor Plans, Photos & Documents | Suggested Properties

Utilities

Utility	Contact	Reference	Issuance Date	Expiry Date	Remarks
Electronics Services		Electricity	05/28/2021	06/28/2021	Electricity
Water Services		Water Supply	05/28/2021	06/28/2021	Water Supply
Gas Connection		Gas Connection	05/28/2021	06/28/2021	Gas Connection

Safety Certificate

Certificate	Contact	Reference	Expiry Dat...	EW	Weeks

Floor plans, Photos, and Documents:

In this tab, the user will be able to add floor plans in pdf and image format, photo images with their description (like bedroom, bathroom, balcony), and an additional certificate with its expiry date.

Note: Document added here in this tab can be also checked through Document Expiry Report

Property Management | Property Details | Tenant Details | Landlord Details | Property Booking | Reporting | Configuration | Mitchell Admin

Property / Cloud Haven

General | Depreciation Board | History | Maintenance | Sub Properties | Occupancy | Rents/Rates & Tenancy | Utility, Insurance & Safety Certificate

Purchase And Sale Details | Nearest Places | **Floor Plans, Photos & Documents** | Suggested Properties

Floor Plans

Description	Photos

Photos

Description	Photos	Secondary Photo
Kids Room	14.53 Kb	☐
Room	6.81 Kb	☐
Room	6.44 Kb	☐
Room	105.34 Kb	☐

Property Hierarchy

Here in this below image, the user will be shown all the property handled by him and if there are any parent property added in the property then it will be shown in a tree-like structure for the same.

Property Management							
Property Hierarchy							
Parent Property Search...							
Filters Group By Favorites							
1-11 / 11							
☐	Asset Name	Category	Property Type	Date	Furnishing	Gross Value	State
▶	Golden Villa (1)					15,000.00	
▶	Diamond Crest (1)					20,000.00	
▶	Royal Manor (1)					20,000.00	
▶	Cloud Haven (1)					20,000.00	
☐	Cleveland	Property - 3 Years	Flat	05/28/2021	Full Furnished	20,000.00	Available
▶	Trek Rise (1)					20,000.00	
▶	White Villa (1)					15,000.00	
▶	Miranda avenue (1)					0.00	
▶	Zort (1)					10,000,000.00	
▶	Sub Property (4)					0.00	
▶	Main Property Demo (1)					1,000,000.00	
▶	Sub Property Demo (6)					6,000,000.00	

Subproperty in tree view

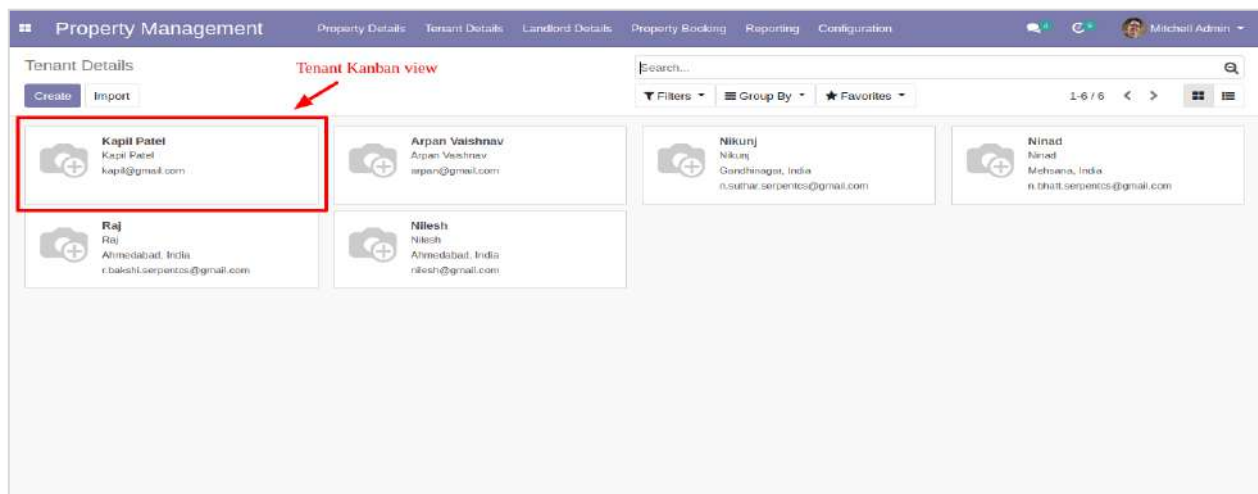
Tenancy Management

- 📌 Create tenancy directly from the property page or tenant page.
- 📌 Select deposit and rent with type for the property to tenancy.
- 📌 Schedule a rent from the same page and add maintenance details from tabs.
- 📌 Commission features can also be generated from tenancy.
- 📌 Register and invoice payment from the rent schedule page.

Tenant

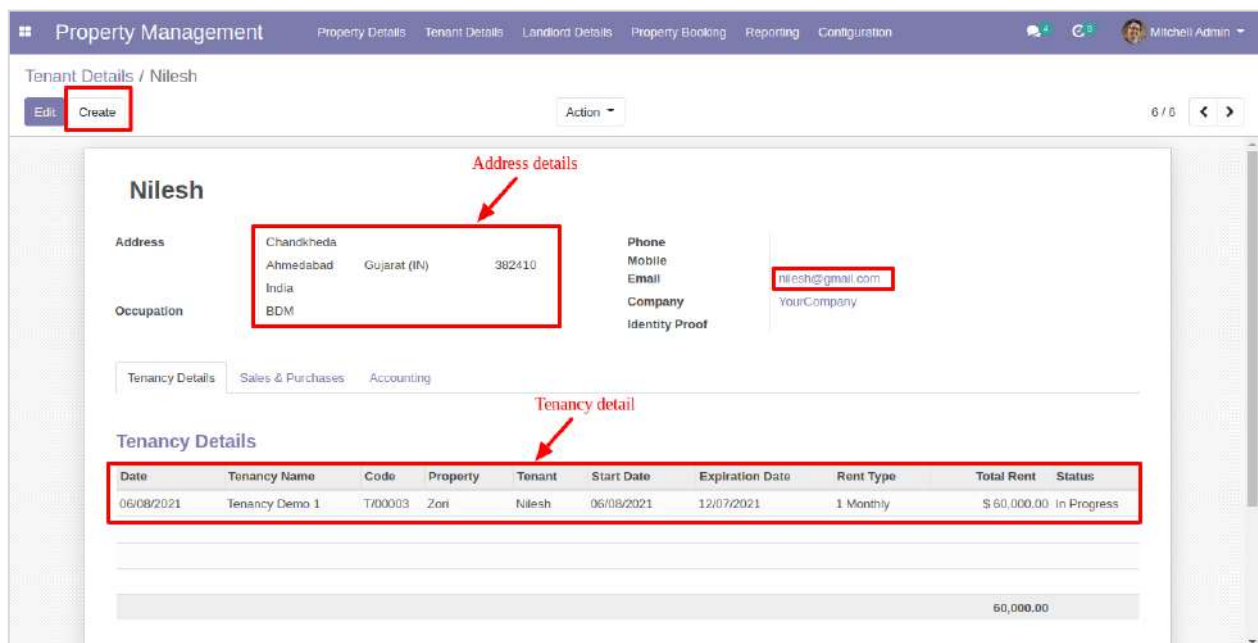
Kanban view:

In this view, all the tenants added by the company admin will be shown with its details and contact information.



Tenant Creation:

In tenant creation, the user will have to add contact details like email id and address to start with. Once the user's tenancy is created it will be shown in the tenancy details tab.



Tenant purchase and sales details:

All the details of sales and purchases with the tenant are shown in this tab. If a tenant is also an “agent” or “is an owner” then here from this it will be activated.

Tenant Details / Nilesh

Address: Chandkheda, Ahmedabad, Gujarat (IN), 382410, India

Phone: Mobile, Email: nilesh@gmail.com, Company: YourCompany, Identity Proof

Occupation: BDM

Tenancy Details: **Sales & Purchases** | Accounting

Salesperson: Mitchell Admin

Reference Language: English (US)

Tenant: ☒ *Select this true if user is only tenant*

Agent: ☐

Is a Owner: ☐ *If a tenant is also agent or an owner of property then select as per the need*

Active: ☒

Tenancy

Kanban view:

In this view, all tenancy created by that project manager will be shown to him in a different state. Here there is also a list view with details view available.

Tenant Tenancy

Search...

Filters | **Group By** | **Favorites**

1-3 / 3

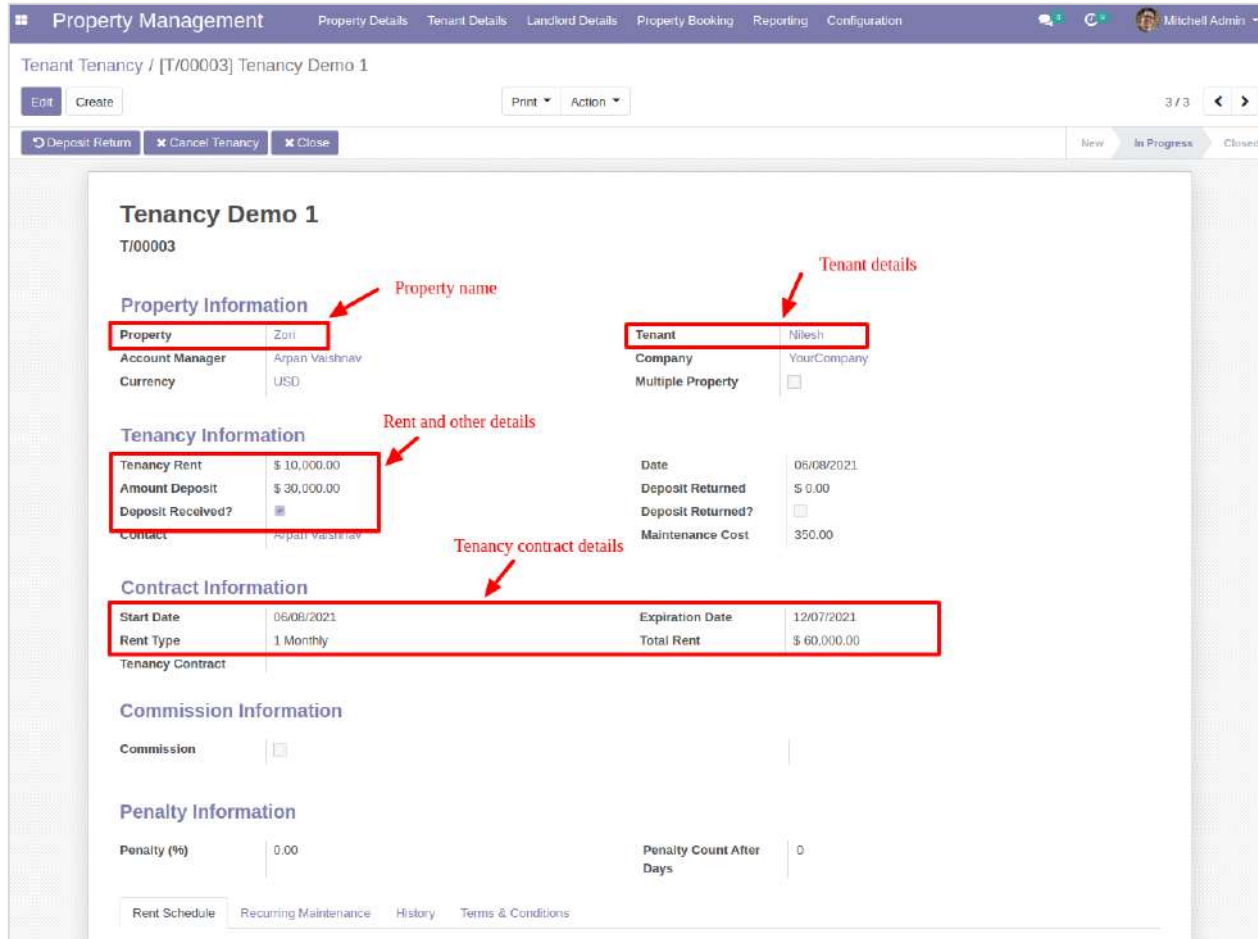
[T/00001] Tenancy-001 Kapil Patel 05/28/2021 - 11/28/2021 Completed	[T/00002] Cloud Heaven Tenancy \$ 140,000.00 Raj 05/31/2021 - 07/07/2022 In Progress	[T/00003] Tenancy Demo 1 \$ 60,000.00 Nilesh 09/09/2021 - 12/07/2021 In Progress
---	--	--

Kanban view of Tenancy

Tenancy details:

As shown in the below image all the details of tenancy can be added. The user will have to select the property name and all the details of the address will be generated automatically.

Then the user will add details of rent and deposit added and tenant details will be added in the same with start and end details are also needed to be added.



Property Management | Property Details | Tenant Details | Landlord Details | Property Booking | Reporting | Configuration | Mitchell Admin

Tenant Tenancy / [T/00003] Tenancy Demo 1

Print | Action | 3 / 3

Deposit Return | Cancel Tenancy | Close | New | In Progress | Closed

Tenancy Demo 1

T/00003

Property Information

Property | Zon

Account Manager | Arpan Vaishnav

Currency | USD

Tenant | Nilesh

Company | YourCompany

Multiple Property | ☐

Tenancy Information

Tenancy Rent | \$ 10,000.00

Amount Deposit | \$ 30,000.00

Deposit Received? | ☐

Contact | Arpan Vaishnav

Date | 05/08/2021

Deposit Returned | \$ 0.00

Deposit Returned? | ☐

Maintenance Cost | 350.00

Contract Information

Start Date | 06/06/2021

Expiration Date | 12/07/2021

Rent Type | 1 Monthly

Total Rent | \$ 60,000.00

Tenancy Contract

Commission Information

Commission | ☐

Penalty Information

Penalty (%) | 0.00

Penalty Count After Days | 0

Rent Schedule | Recurring Maintenance | History | Terms & Conditions

Rent Schedule:

Once the tenancy is created you will be shown a schedule rent button. Once you click on that button all rent schedules will be generated and its events will be generated in the calendar with contact details and tenancy names.

Rent Schedule Details

Date	Amount	Penalty Amount	Pending Amount	Cheque Detail	Invoice	Notes	Paid	Posted
06/08/2021	\$ 10,000.00	0.00	0.00		INV/2021/0007		☒	☒
07/08/2021	\$ 10,000.00	0.00	0.00				☐	☐
08/08/2021	\$ 10,000.00	0.00	0.00				☐	☐
09/08/2021	\$ 10,000.00	0.00	0.00				☐	☐
10/08/2021	\$ 10,000.00	0.00	0.00				☐	☐
11/08/2021	\$ 10,000.00	0.00	0.00				☐	☐
60,000.00								

Recurring maintenance:

In the recurring maintenance tab, the user will add maintenance details while creating tenancy details that will also be shown in the monthly rent schedule invoices.

Recurring Maintenance

Maintenance Type	Maintenance Cost
Lift	250.00
Electricity Check Monthly	100.00

History:

In the history tab, you can view all the details of paid invoices with account details. All the posted entries will be shown in that tab.

Property Management

Property Details
Tenant Details
Landlord Details
Property Booking
Reporting
Configuration

4

5

Mitchell Admin

Tenant Tenancy / [T/00003] Tenancy Demo 1

Edit

Create

Print

Action

3 / 3

Penalty (%)

0.00

Penalty Count After Days

0

Rent Schedule

Recurring Maintenance

History

Terms & Conditions

Payment history

Account History

Date	Label	Reference	Journal Entry	Journal	Account	Debit	Credit
06/08/2021	Tenancy(Rent) Cost	INV/2021/0007	Customer Invoices (USD)	101000 Current Assets		\$ 0.00	\$ 10,000.00
06/08/2021	Maintenance cost	INV/2021/0007	Customer Invoices (USD)	101000 Current Assets		\$ 0.00	\$ 350.00
						0.00	10,350.00

Notes

Total Credit Amount:

\$ 10,350.00

Total Debit Amount:

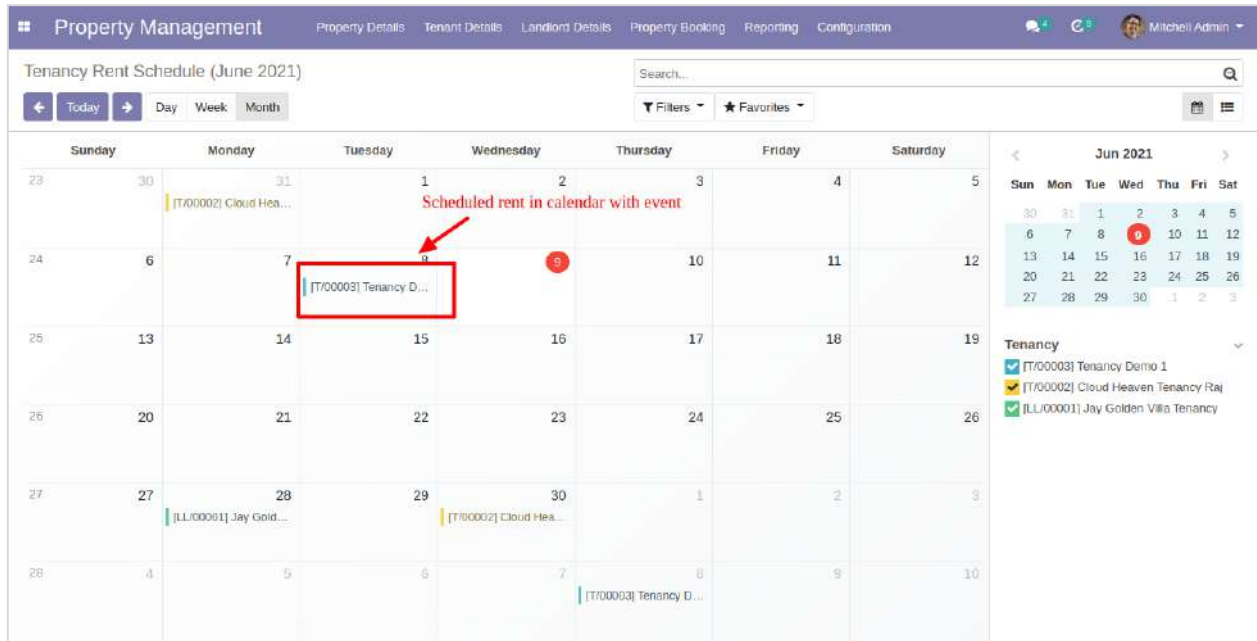
\$ 0.00

Total Expenditure:

\$ 10,350.00

Rent schedule

In the calendar, all the rent scheduled will be shown as a reminder event and if we click on that event name, we will be shown details of the payment amount and tenancy name.



Property Management | Property Details | Tenant Details | Landlord Details | Property Booking | Reporting | Configuration | Mitchell Admin

Tenancy Rent Schedule (June 2021)

Search...

← Today → Day Week Month

Filters Favorites

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
23	30	31	1	2	3	4
24	6	7	8	9	10	11
25	13	14	15	16	17	18
26	20	21	22	23	24	25
27	27	28	29	30	1	2
28	4	5	6	7	8	9

Jun 2021

Sun	Mon	Tue	Wed	Thu	Fri	Sat
30	31	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	1	2	3

Tenancy

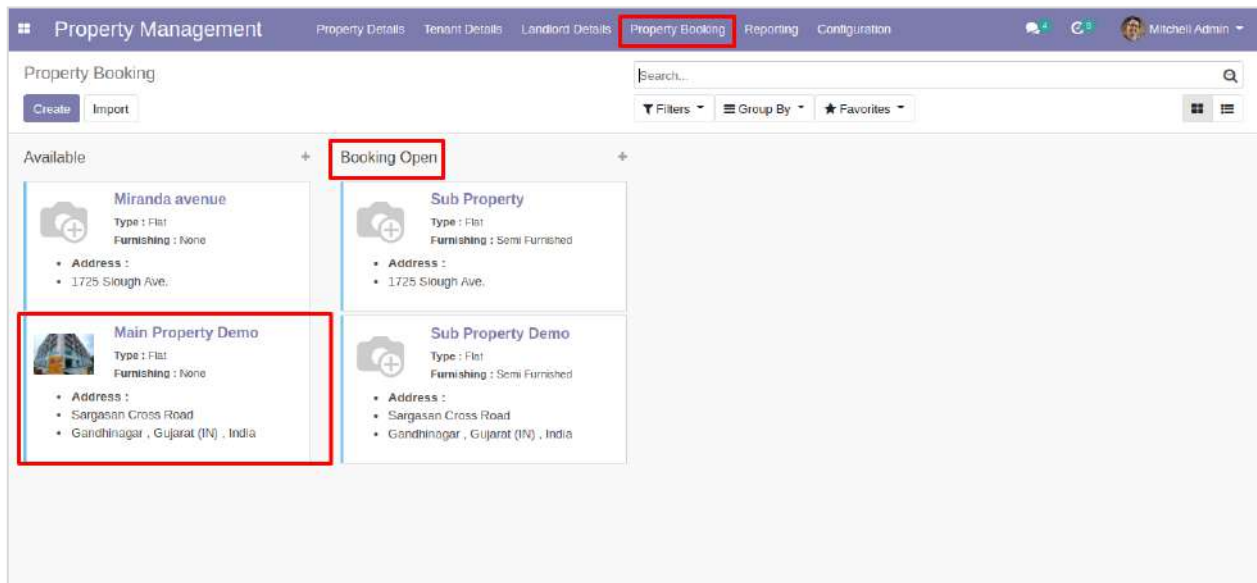
- [T7/00003] Tenancy Demo 1
- [T7/00002] Cloud Heaven Tenancy (Raj)
- [LL/00001] Jay Golden Villa Tenancy

Book Property

Main property

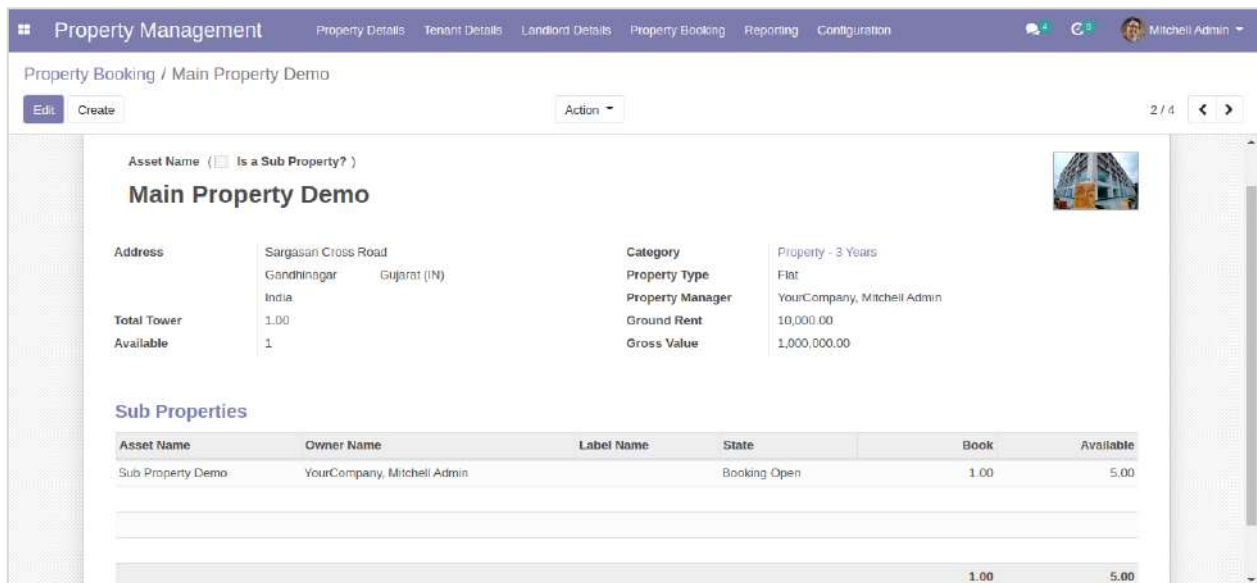
Kanban view:

In Kanban View, the user will be shown details of the property available for booking, and for that, all stages are also shown with details of type and address.



Property details:

When the user clicks on a particular property he will be shown basic details of a property like address and value details.



Sub property

List view:

There is another menu of Sub Property, where all the Parent properties with Sub properties in the tree view are shown with availability details.

Asset Name	Parent Property Relation	Label Name	Property Per Floors	Furnishing	State
Sub Property (4)					
Sub Property Demo (6)					
☐ Sub Property Demo-101	Main Property Demo		1	Semi Furnished	Available
☐ Sub Property Demo-102	Main Property Demo		1	Semi Furnished	Available
☐ Sub Property Demo-201	Main Property Demo		1	Semi Furnished	Booked
☐ Sub Property Demo-202	Main Property Demo		1	Semi Furnished	Available
☐ Sub Property Demo-301	Main Property Demo		1	Semi Furnished	Available
☐ Sub Property Demo-302	Main Property Demo		1	Semi Furnished	Available

Detailed view :

Once the user clicks on a single property he will be shown all details and there can be all properties that can be merged to other properties with all details added into one property.

Sub Property Demo
Main Property Demo

Address: Sargasan Cross Road, Gandhinagar, Gujarat (IN), India

Category: Property / 3 Years

Property Type: Flat

Property Manager: YourCompany, Mitchell Admin

Prefix For Property: 101

Ground Rent: 10,000.00

Gross Value: 1,000,000.00

Number Of Floors: 3

Change Label: ☐

Available: 5

Property Per Floors: 2

Furnishing: Semi Furnished

Sub Properties:

Asset Name	Owner Name	Label Name	State	
Sub Property Demo-101	YourCompany, Mitchell Admin		Available	☒
Sub Property Demo-102	YourCompany, Mitchell Admin		Available	☒
Sub Property Demo-201	YourCompany, Mitchell Admin		Booked	☒
Sub Property Demo-202	YourCompany, Mitchell Admin		Available	☒
Sub Property Demo-301	YourCompany, Mitchell Admin		Available	☒
Sub Property Demo-302	YourCompany, Mitchell Admin		Available	☒

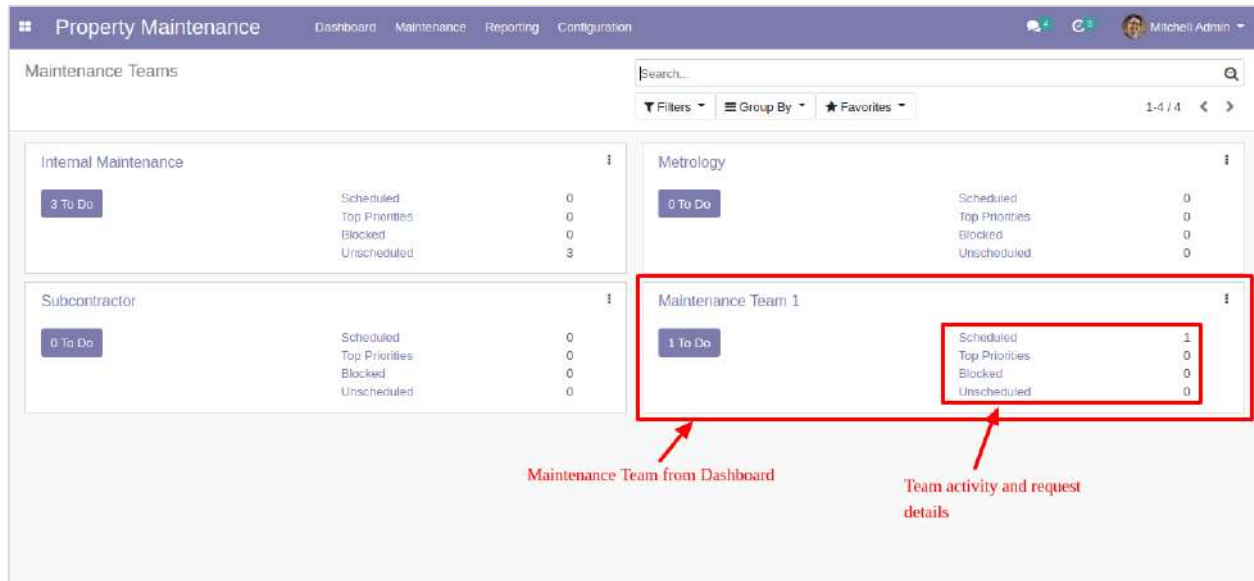
Maintenance Management

- Manage maintenance teams and their equipment.
- generate and resolve maintenance requests using the calendar.
- interactive advanced dashboard for maintenance teams.
- Equipment maintenance can also be requested and maintained with details.

Maintenance request

Dashboard:

Here all maintenance teams are shown and details of all upcoming and done activities are shown in kanban view.



Maintenance Teams

Team	To Do	Scheduled	Top Priorities	Blocked	Unscheduled
Internal Maintenance	3	0	0	0	3
Metrology	0	0	0	0	0
Subcontractor	0	0	0	0	0
Maintenance Team 1	1	1	0	0	0

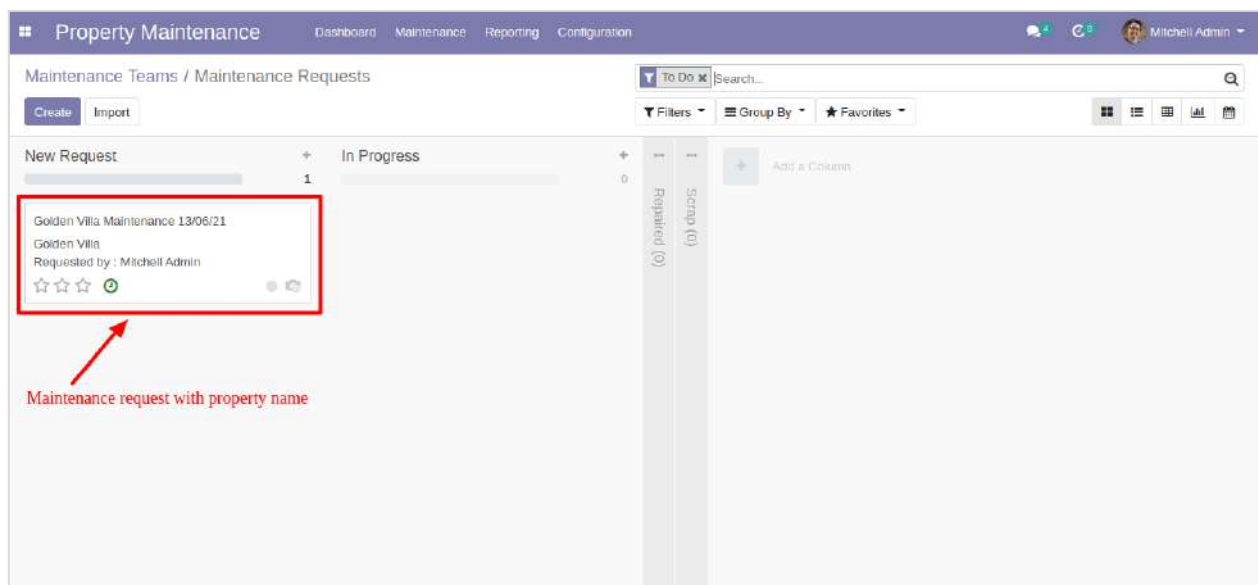
Maintenance Team from Dashboard

Team activity and request details

Team requests:

When we click on the team, the request in kanban view with its base details is shown with any event scheduled for the same.

It is also shown in different kanban stages.



Maintenance Teams / Maintenance Requests

Create Import

Filters: To Do Search...

Group By Favorites

New Request + In Progress + Done

Golden Villa Maintenance 13/06/21

Golden Villa

Requested by: Mitchell Admin

Maintenance request with property name

Request Details:

Opening a maintenance request will show a form with all details of the property, maintenance type and the team which is assigned for maintenance will be shown.

If there is the extra cost it will also be shown and its invoices are also generated in that.

Property Management | Property Details | Tenant Details | Landlord Details | Property Booking | Reporting | Configuration | Mitchell Admin

Property / Golden Villa / Maintenance Request / New

Save | Discard

Cancel | Get Location

New Request | In Progress | Repaired | Scrap

Title
Maintenance Request

Property Name: Golden Villa

Request Date: 05/09/2021

Close Date

Maintenance Type: ☒ Corrective ☐ Preventive

Tenant

Team: Internal Maintenance

Responsible

Scheduled Date

Duration: 00:00 hours

Cost: 0.00

Renters Fault: ☐

Invoice

Invoice Date

Priority

Maintenance type

Maintenance team selection

Property Details | Description

Equest Calendar view:

In this calendar view, all request details with their scheduled date will be shown as per the assigned person.

Property Maintenance | Dashboard | Maintenance | Reporting | Configuration | Mitchell Admin

Maintenance Requests (June 2021)

Maintenance Teams

Today | Day | Week | Month

Filters | Favorites

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
23	30 Golden Villa Maintan...	31	1	2	3	4
24	6	7	8	9	10	11
25	13 Golden Villa Maintan...	14	15	16	17	18
26	20	21	22	23	24	25
27	27	28	29	30	1	2
28	4	5	6	7	8	9

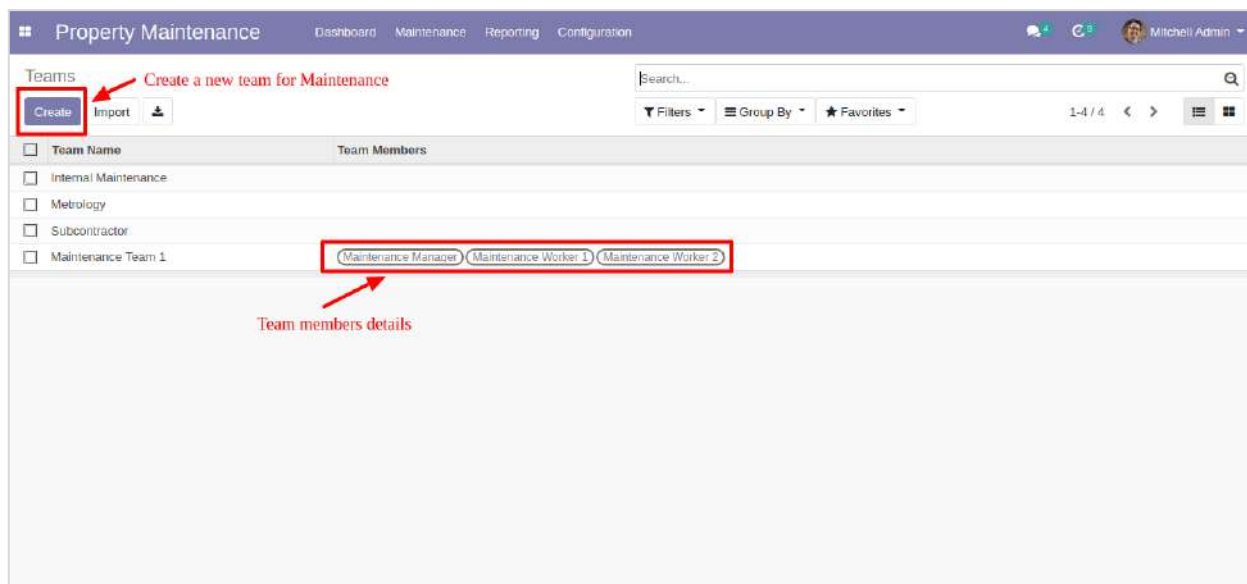
Jun 2021

Technician

- Maintenance Worker 1
- Joel Willis

Maintenance teams

In the configuration menu, there is a team creation configuration shown for maintenance. Users can add team members to a team.



The screenshot displays the 'Property Maintenance' configuration interface. At the top, there are navigation tabs: 'Dashboard', 'Maintenance', 'Reporting', and 'Configuration'. The 'Configuration' tab is active. Below the tabs, the 'Teams' section is visible. It includes a 'Create' button (highlighted with a red box and labeled 'Create a new team for Maintenance'), an 'Import' button, and a search bar. A table lists team configurations with columns 'Team Name' and 'Team Members'. The table contains three rows: 'Internal Maintenance', 'Metrology', and 'Subcontractor'. The 'Maintenance Team 1' row is expanded, showing 'Maintenance Manager', 'Maintenance Worker 1', and 'Maintenance Worker 2' (highlighted with a red box and labeled 'Team members details').

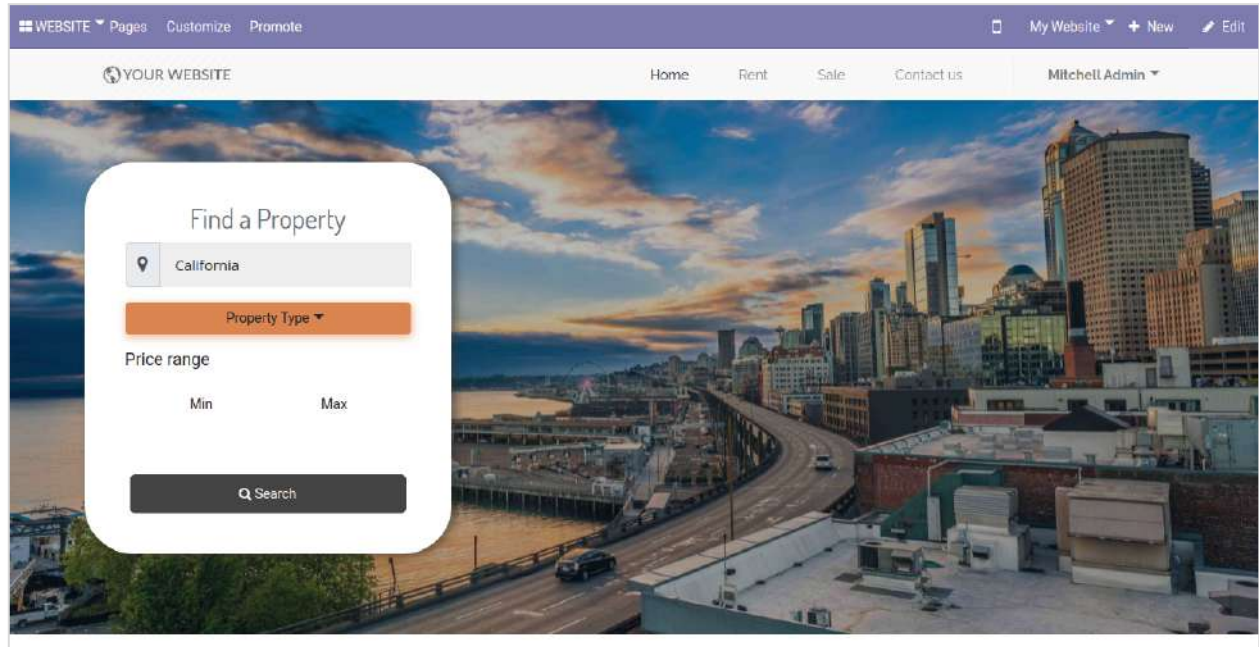
Team Name	Team Members
☐ Internal Maintenance	
☐ Metrology	
☐ Subcontractor	
☐ Maintenance Team 1	Maintenance Manager Maintenance Worker 1 Maintenance Worker 2

Website and CRM

Search

The Property management solution also comes with a website where you can show all properties on the front end.

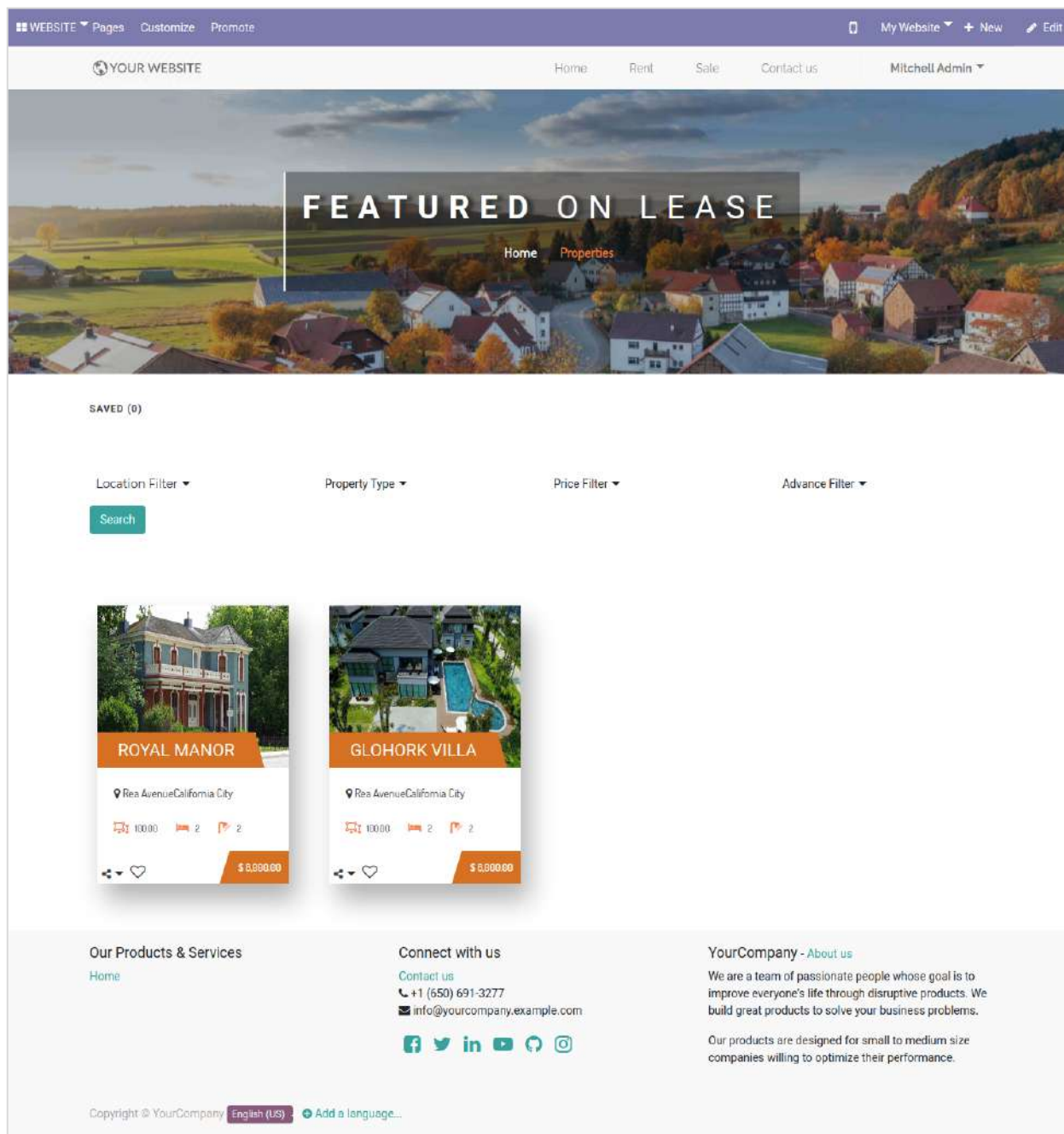
Here there is a search bar assigned with a state or country name.



Search results:

When a website user searches for a property he will be shown all properties of that area.

There is also sorting and filters available on the search result page.



Query

The user will be shown a form on the property detail page where the user will put his query for the property and that will be directly shown in the CRM of the system.

WEBSITE Pages Customize Promote My Website + New Edit

YOUR WEBSITE Home Rent Sale Contact us Mitchell Admin

Property Address

Request To Book

Samarth

Modi

1234567890

Mobile

samrth123@gmail.com

Anytime

Details please

Request

CRM use

In CRM property manager will have a lead generated based on a detailed query from the website.

CRM Sales Leads Reporting Configuration Mitchell Admin

Leads / Royal Manor

Edit Create Action

23 / 23

Create Quotation Convert to Opportunity Mark as Lost Create Contract

Royal Manor

91.67 %

Company Name

Is Rent

Is Buy

Address

Website

Language

Salesperson Mitchell Admin

Sales Team Europe

Is Demand

Contact Name Samarth Modi

Email samrth123@gmail.com

Job Position

Phone 1234567890 SMS

Mobile

Priority

Tags

Internal Notes Extra Info

details please

Reports

- Any company needs to have its income and expenditure on hand.
- This report will check all the income and expenses done based on a property with the use of filters and details of accounts based on payment made.

Different types of reports include income expenditure, tenancy by the tenant, investment Analysis, safety expiry, etc.

Tenancy Contract Expiry report

In this report, the user will have to select start and end date and he will be shown a report for all the property with details with its tenancy basic details.

Property Management

Property Details

Tenant Details

Landlord Details

Property Booking

Reporting

Configuration

4

C

Mitchell Admin

Recurring Maintenance Type / Tenancy Contract Expiry

Search...

Filters

Group By

Favorites

1-4 / 4

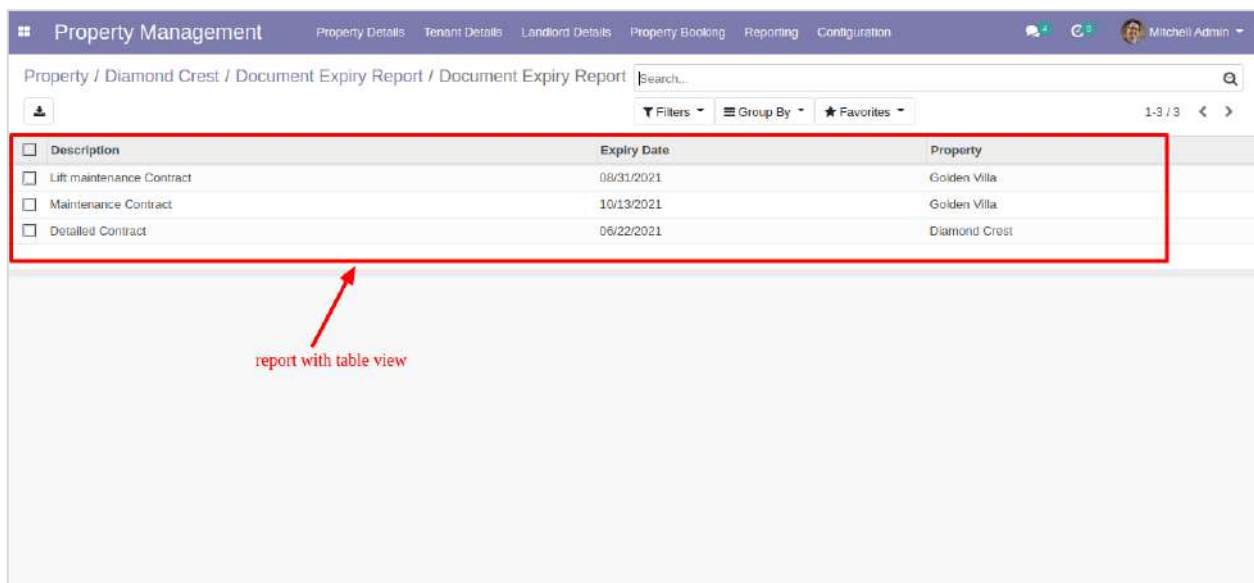
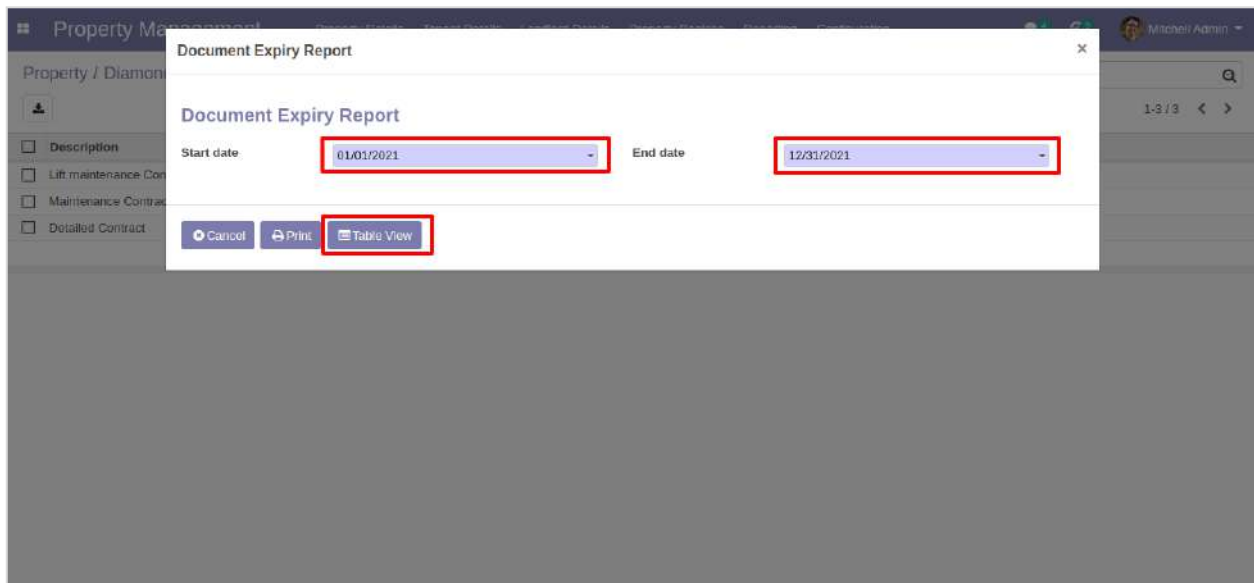
☐	Date	Tenancy Name	Code	Property	Tenant	Start Date	Expiration Date	Rent Type	Tenancy Rent	Total Rent	Status
☐	05/28/2021	Jay Golden Villa Tenancy	LL/00001	Golden Villa		05/28/2021	06/15/2022	1 Monthly	\$ 0.00	\$ 195,000.00	In Progress
☐	05/28/2021	Tenancy-001	T/00001	Diamond Crest	Kapil Patel	05/28/2021	11/28/2021	1 Monthly	\$ 8,000.00	\$ 0.00	Cancelled
☒	05/28/2021	Cloud Heaven Tenancy Raj	T/00002	Cloud Haven	Raj	05/31/2021	07/27/2022	1 Monthly	\$ 10,000.00	\$ 140,000.00	In Progress
☐	06/08/2021	Tenancy Demo 1	T/00003	Zori	Nilesh	06/08/2021	12/07/2021	1 Monthly	\$ 10,000.00	\$ 60,000.00	In Progress
										395,000.00	

Tenancy contract expiry report

Document Expiry report

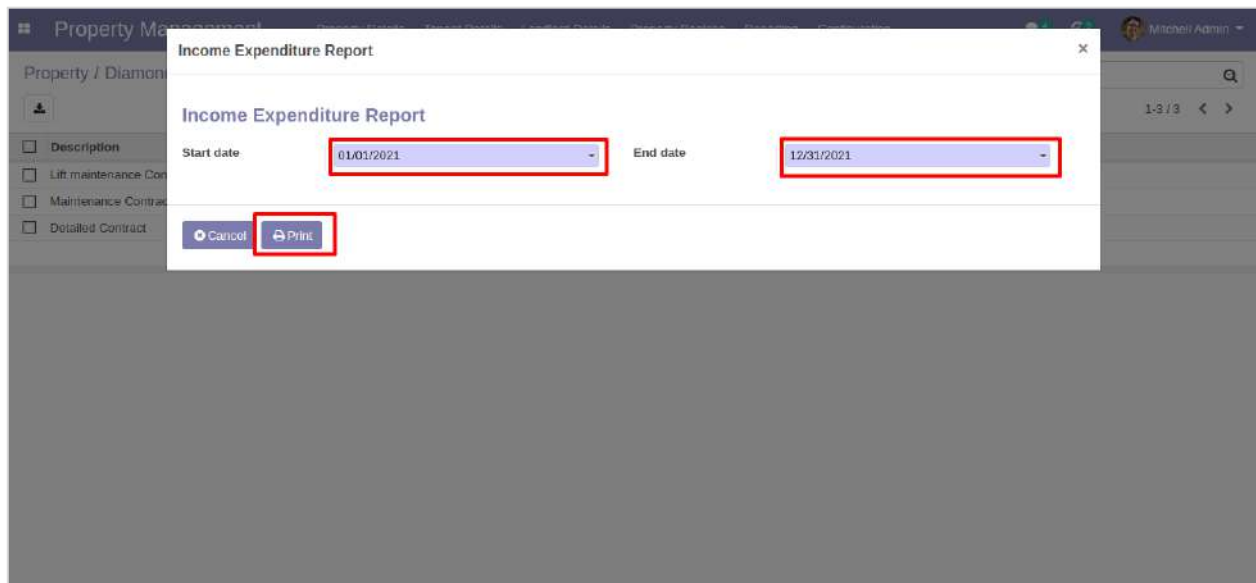
In this report there are two views available to the user, one is a table view for the backend and another one is a print view in which the user will be able to download the report in pdf file format.

The user will select start and end date and click on the particular selection of report. In property page user will have added a document details and its expiry details all the properties document which are in the time period expiry will be shown here.



Income expenditure report

The income-expenditure report will be based on all property and its all tenancy rent input details.

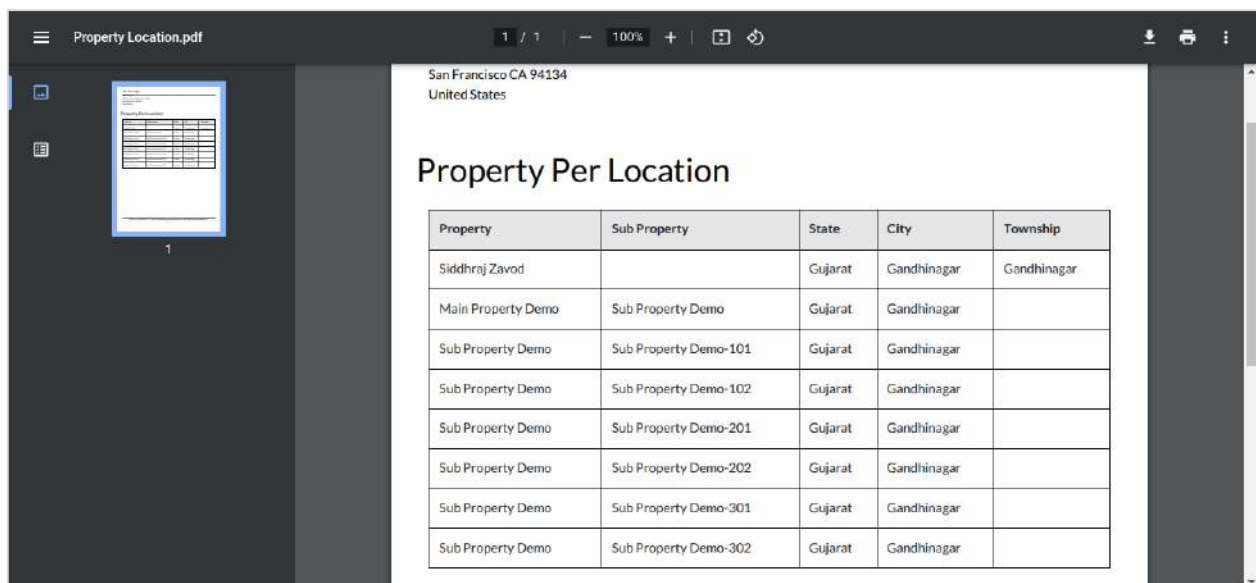
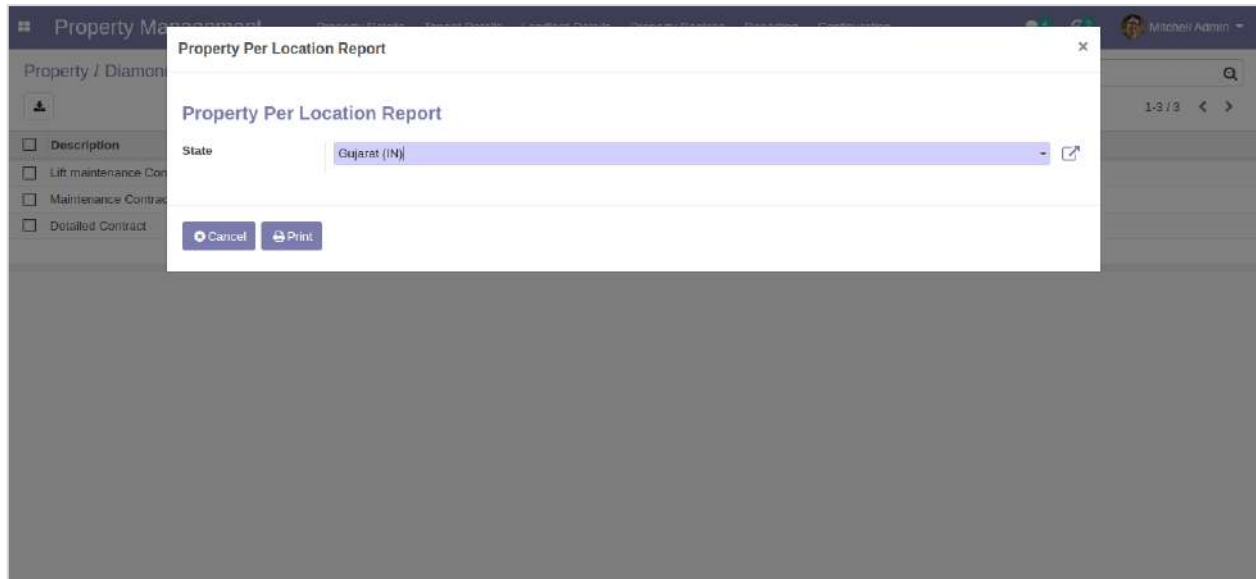


The screenshot shows a PDF document titled 'Income Expenditure Report'. The report is for the period 'From: 2021-01-01 To: 2021-12-31'. The table lists properties and their corresponding income and expenditure values.

Property	Income	Expenditure
Golden Villa	120000.0	0.0
Grimfield	0.0	0.0
Diamond Crest	0.0	0.0
Dawson Drive	0.0	0.0
Royal Manor	0.0	0.0
Glohork Villa	0.0	0.0
Cloud Haven	80000.0	0.0
Cleveland	0.0	0.0

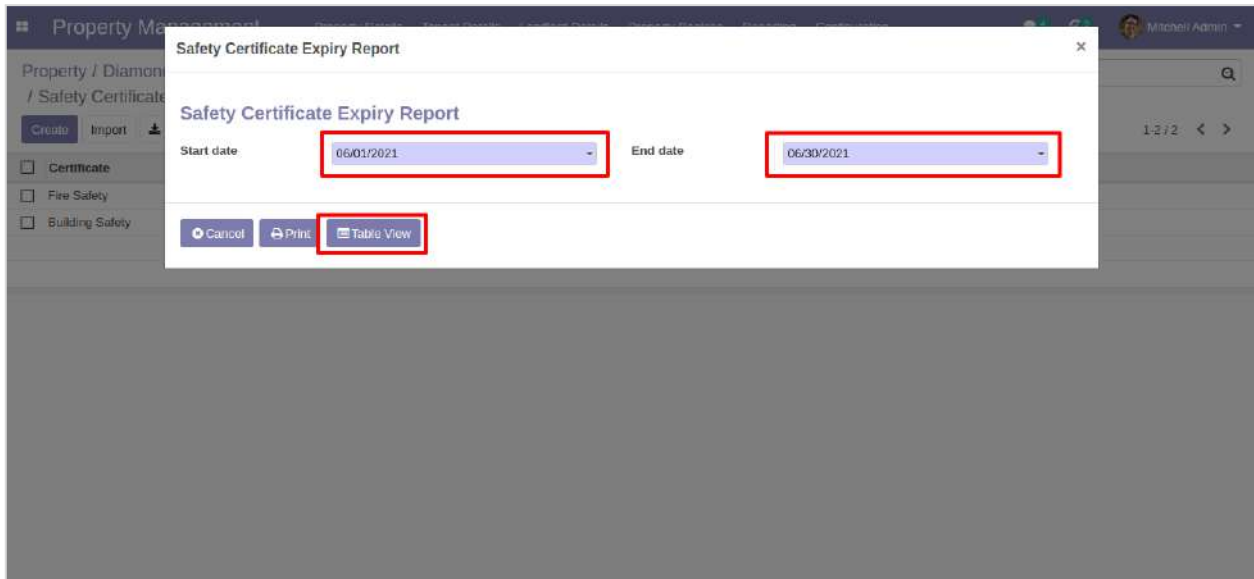
Property per location report

In this report users can select the state available in the system and all properties available on the property management will be a show of that state.



Safety Certificate Expiry report

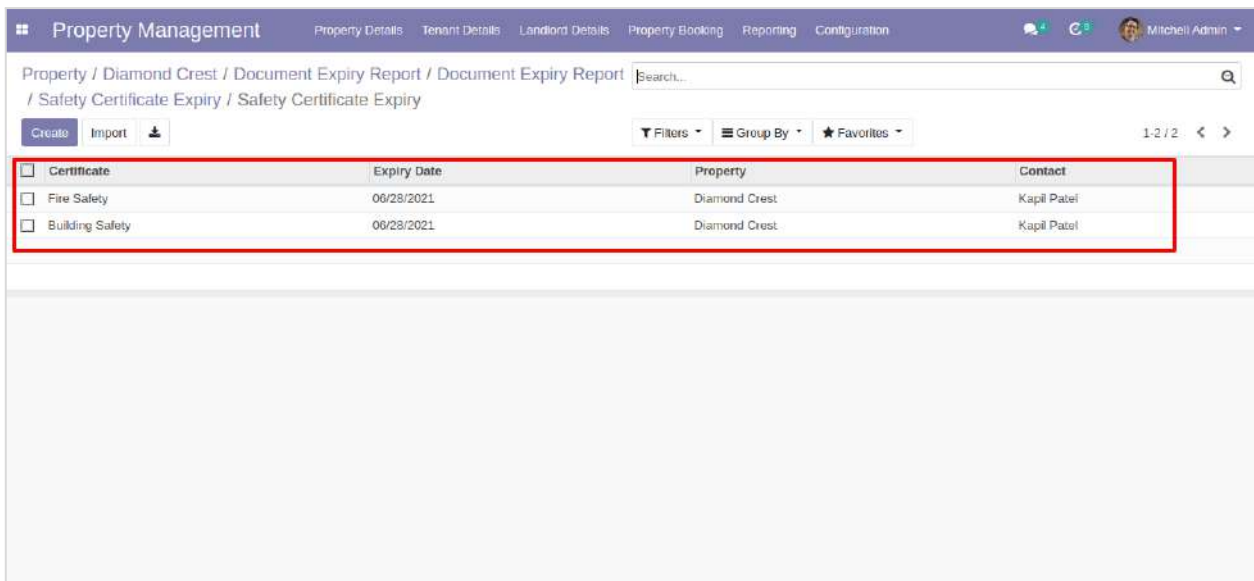
In this report, the user will be shown all the certificates of the property expiring in the time period selected on the first page.



Safety Certificate Expiry Report

Start date: 06/01/2021 End date: 06/30/2021

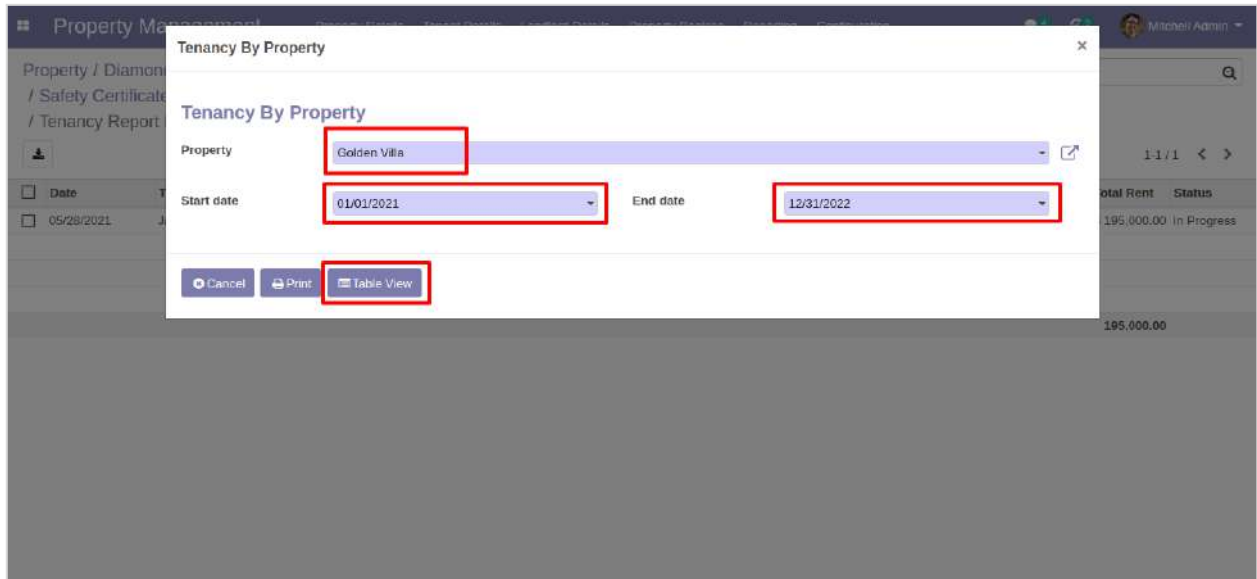
Buttons: Cancel, Print, Table View



Certificate	Expiry Date	Property	Contact
Fire Safety	06/28/2021	Diamond Crest	Kapil Patel
Building Safety	06/28/2021	Diamond Crest	Kapil Patel

Tenancy by Property report

In this report, the tenancy created on a particular property based on the selected time of start and end date will be shown.

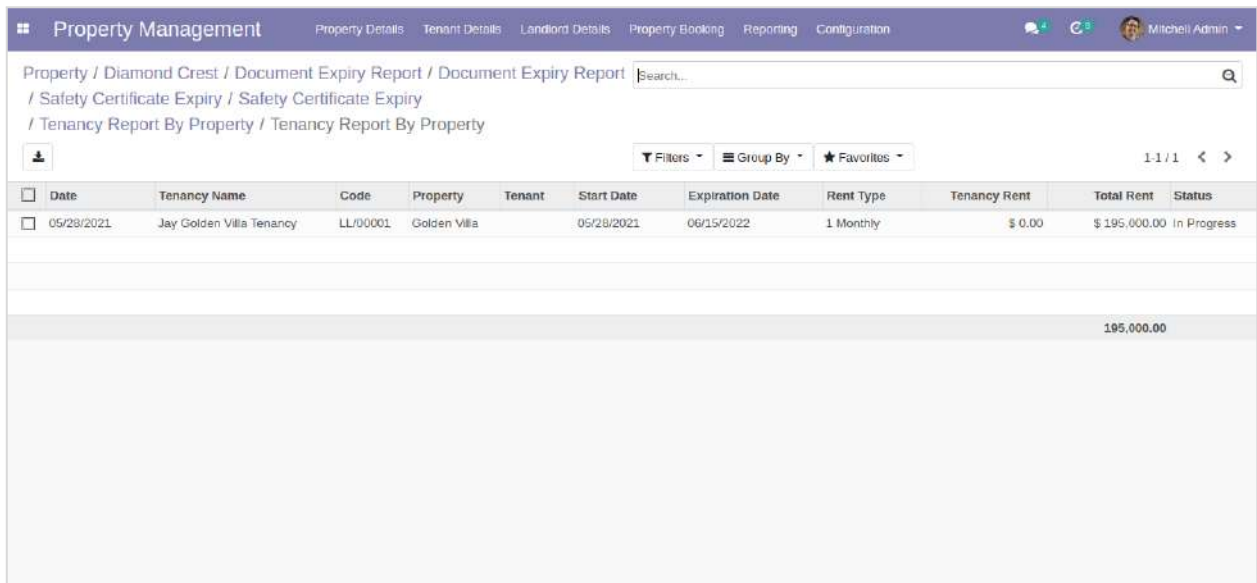


Tenancy By Property

Property: Golden Villa

Start date: 01/01/2021 End date: 12/31/2022

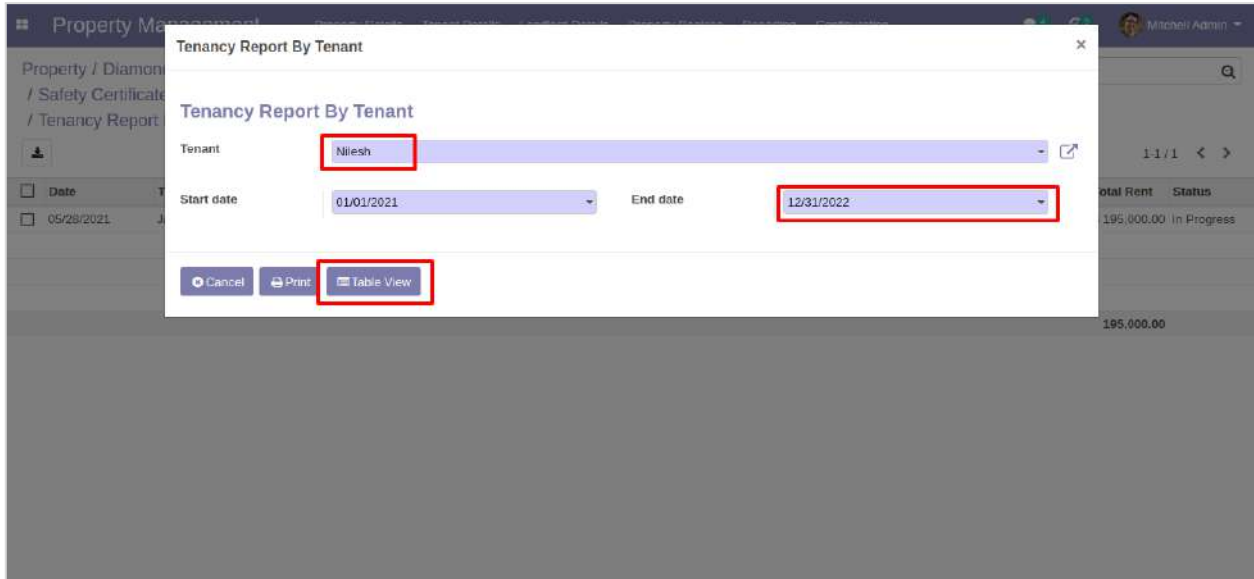
Buttons: Cancel, Print, Table View



Date	Tenancy Name	Code	Property	Tenant	Start Date	Expiration Date	Rent Type	Tenancy Rent	Total Rent	Status
05/28/2021	Jay Golden Villa Tenancy	LL/00001	Golden Villa		05/28/2021	06/15/2022	1 Monthly	\$ 0.00	\$ 195,000.00	In Progress
									195,000.00	

Tenancy by Tenants report

In this report, All the tenancy created for a particular tenant from time of start to end date will be shown.

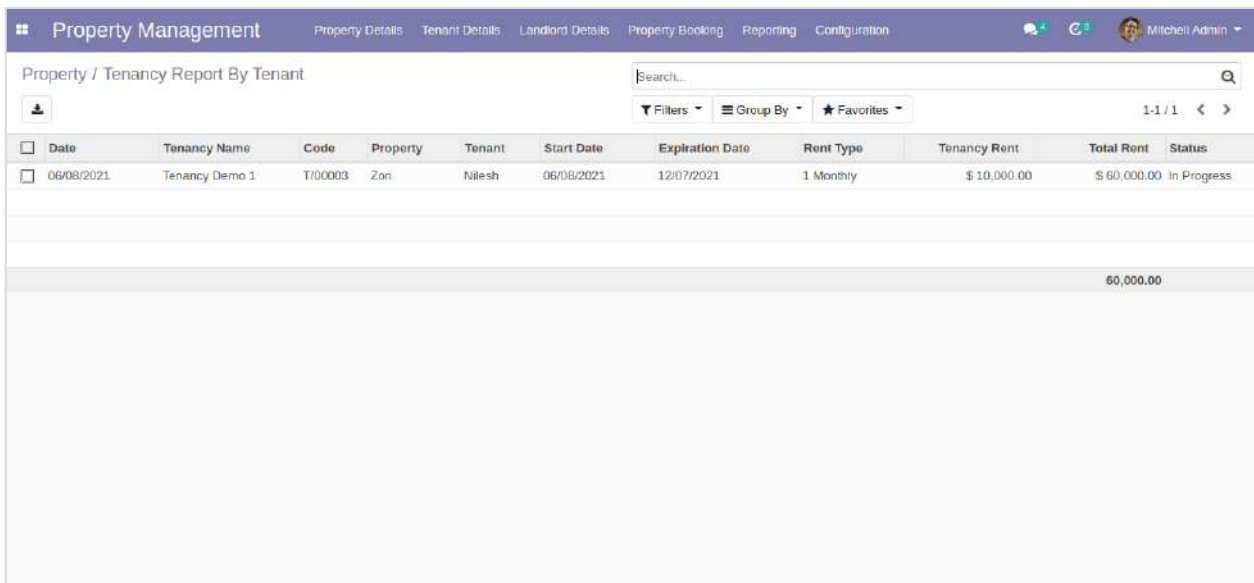


Tenancy Report By Tenant

Tenant: Nilesh

Start date: 01/01/2021 End date: 12/31/2022

Cancel Print Table View



Date	Tenancy Name	Code	Property	Tenant	Start Date	Expiration Date	Rent Type	Tenancy Rent	Total Rent	Status
06/08/2021	Tenancy Demo 1	T/00003	Zon	Nilesh	06/08/2021	12/07/2021	1 Monthly	\$ 10,000.00	\$ 60,000.00	In Progress

60,000.00

GFA analysis report

Here in this report, all GFA details of all types of property will be shown, with GFA and property name.

	Total			
	+ Bungalow	+ Flat	+ Office	
	GFA (Sqft)	GFA (Sqft)	GFA (Sqft)	GFA (Sqft)
- Total	700.00	600.00	1,000.00	2,300.00
- true	700.00	600.00	1,000.00	2,300.00
- Golden Villa	100.00			100.00
+ Grimfield	100.00			100.00
- Diamond Crest	100.00			100.00
+ Dawson Drive	100.00			100.00
- Royal Manor	100.00			100.00
+ Gishork Villa	100.00			100.00
+ Cloud Haven		100.00		100.00
+ Trek Rise		100.00		100.00
+ White Villa		100.00		100.00
+ Miranda avenue				
+ Zori				
+ Sub Property				
+ Main Property Demo				
+ Sub Property Demo				
+ Undefined	400.00	300.00	1,000.00	1,700.00

Investment Analysis report

In this report, all purchase prices, return period, and Return on Investment will be shown on the property name.

	Bungalow			Flat			Office		
	Purchase Price	Return Period	ROI	Purchase Price	Return Period	ROI	Purchase Price	Return Period	ROI
- Total	0.00	8,000.00		0.00	10,000.00		0.00	10,000.00	
- true	0.00	8,000.00		0.00	10,000.00		0.00	10,000.00	
+ Golden Villa	0.00	0.00							
+ Diamond Crest	0.00	0.00							
+ Royal Manor	0.00	0.00							
+ Cloud Haven				0.00	0.00				
+ Trek Rise				0.00	0.00				
+ White Villa				0.00	0.00				
+ Miranda avenue				0.00	0.00				
+ Zori				0.00	0.00				
+ Sub Property				0.00	0.00				
+ Main Property Demo				0.00	0.00				
+ Sub Property Demo				0.00	0.00				
+ Undefined	0.00	8,000.00		0.00	10,000.00		0.00	10,000.00	

Get in touch

We'd love to hear from you!

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