



DYNAMIC NETSOFT  
**RealEstatePro**

A Comprehensive Solution to Manage your  
Real Estate Business



Dynamics 365 for  
**Operations**



## RealEstatePro - Real Estate Suite on Dynamics 365 for Operations

Dynamic Netsoft Technologies delivers solutions and professional services to optimize business process of customers. Our solutions help in analysis and make strategies and decisions.

RealEstatePro on Dynamics 365 for Operations is one of our flagship solutions that helps automate the renting, leasing or sales cycle in the real estate industry. While the property developers are stretching their capacities to the maximum to meet the growing market demands, a comprehensive Enterprise Resource Planning (ERP) solution with Real Estate solution is vital for their business.

RealEstatePro is built on Dynamics 365 for Operations - a robust platform to automate key business areas of any organization. Hence, RealEstatePro extends the standard functionalities of Dynamics 365 for Operations to provide top-notch ERP capabilities for the real estate industry - property developers, owners, brokers, etc.

RealEstatePro consists of two modules one for property rental / lease and another for property sales.

- Property Management System: Automates property rental and leasing
- Sales Management System: Automates property sales



Fig 1: RealEstatePro Architecture

The solution helps manage residential, commercial, and industrial properties, and provide other real estate related services. RealEstatePro provides real time insights on the business that helps the management make strategies and decisions.





## Why Dynamic Netsoft RealEstatePro?

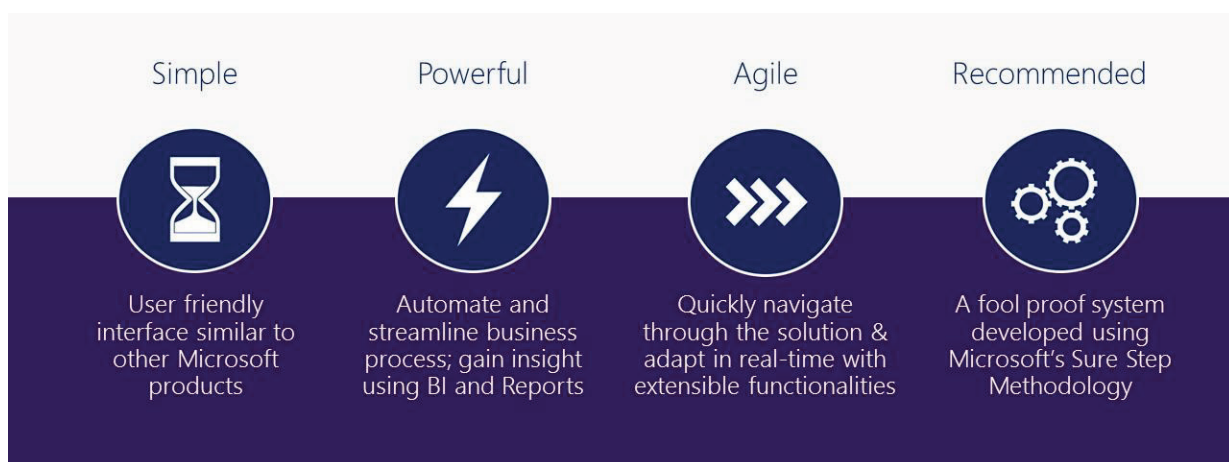


Fig 2: Salient Features of RealEstatePro

## RealEstatePro - Property Management System

### Property creation

Create property hierarchy with blocks, floors and units under each property. This way, all property information is managed in one centralized location. Maintain consistency in area and measurements across property units.

- Maintain properties by using up to three hierarchies such as Property group, Property, Floors and Individual units
- Hierarchy helps to quickly identify which unit is occupied and which is available.

### Property information management

All property information is maintained in one location and this helps easy retrieval and enables responding to customer with accurate information.

- Manage the furnishings provided to the units and link to the Fixed Assets.
- Define and maintain rent values, standard charges and rates which will be applicable for the agreements.
- Maintain unlimited Unit types such as apartments, villas, office shops, kiosks etc.



## Presales management

The marketing and sales team will be able to respond to queries from prospects and customers with a quick turnaround time.

- Search for availability of properties based on customer specifications and unit availability using a friendly interface.

## Quotation

- Generating a property rent quotation for the prospect/customer, which contains the property and unit information along with pricing details.
- Ability to amend quotation during negotiation with customer and such

## Reservations management

Managing reservations made by customers and prospects for blocking properties is generally an area of concern and time consuming activity for property coordinators and managers.

This suite helps manage the various aspects and functions that surround the reservation of a property unit.

- Receive customer payments against reservations made and knock-off the payments against the agreement or contract once signed.

- Use Sales and Marketing for Lead & opportunity management and analysis with this integrated suite.
- Perform opportunity management, reservation analysis, and measure rental revenues against targets.

negotiation can be tracked in the system.

- Ability to resend the revised quotation to a customer.
- Update of quotation with statuses: created, confirmed, cancelled, and lost based on the sales stage

- Cancel reservations if needed and refund the payments received after deducting cancellation charges.
- Convert reservations into agreements once the deal is firmed up.
- Handle reservation extensions and changes using a configured workflow setup.
- Facilitates accounting for multiple reservation payment by the customer.



## Rent and lease agreements

Property rent agreements or contracts with various terms and conditions from financial perspective as well as from an operational perspective can be created in the system to enable tracking and management of the agreement over its life time.

- Create agreements with parameters such as duration, applicable calendar, payment terms, invoicing frequency, and activity association and so on.

## Agreement execution functions

During the tenure of an agreement, various transactions take place and there is a need to capture and monitor these for effectively managing the customer as well as internal stakeholders.

- Monthly unearned and accrued revenue calculation on a straight-line basis along.
- View of the revenue based on the components that the agreement comprises of.
- Renew an agreement for a defined period with modified terms and conditions. Close

## Rent appraisal

Periodically appraise rent and associated components to match the market conditions and based on business demands.

- Modify agreement value and rent components based on various parameters to suit the specific customer requirements.
- Enable workflows and manage approvals by users based on the defined hierarchy. Amend agreements with reasons and re-trigger the workflow process for a better control mechanism.

- Generate invoices on a periodic basis, receive payments and settle invoices to ensure seamless reconciliation.

an agreement prior to the agreed end date, after the end date with additional rent levied or as per the agreed dates. Post invoices for recovery claims on furniture or any other repairs or damages that may have been incurred during the agreement.

Maintain a history of rent appraisals done over a period.



## Analytics

- User customizable reports giving users the ability to pick information to be displayed on reports
- Ageing analysis of the tenants on multiple levels
- Ability to inquire and generate reports on all historical data including as-of records of accounts receivables and unearned revenue.
- Dashboard on occupancy, vacancy, collections, gross revenue, rent per unit area.



Fig 3: Overall Features of RealEstatePro – Property Management System

## Roles and responsibilities

The primary functions that form the backbone of the property management system have been outlined below:

1. Creating various properties and units based on the business process.
2. Rent agreement creation based on agreed terms
3. Renewing an active agreement based on revised terms of renewal
4. Raising invoices and receiving payments against an agreement
5. Closing an active agreement and posting recovery/refund transactions



## Additional functions that helps users manage day to day operations with ease

1. Searching for availability of properties based on the customer requirements.
2. Managing unit rent pre-sale through quotations.
3. Reserving a unit for a defined period to ensure the unit is blocked for a prospect or customer.
4. Revising the rent of an agreement for future days based on a defined percentage or an amount.
5. Recognizing revenue based on actual service rendered.
6. Posting invoices for utilities that the customer may have incurred during the agreement period.
7. Appraising the rent of a unit to create agreements based on the revised rent in future.



## RealEstatePro - Sales Management

The Real estate sales module of Dynamic Netsoft is a comprehensive solution that addresses the whole gamut of requirements that a Real estate firm may have.

### Property creation

Create property hierarchy with blocks, floors and units under each property. This way, all property information is managed in one centralized location. Maintain consistency in area and measurements across property units.

- Maintain properties by using up to three hierarchies such as Property group, Property, Floors and Individual units
- Hierarchy helps to quickly identify which unit is occupied and which is available.

### Template definition

Real estate companies may need to define common pricelists and property specifications for properties of a similar nature and those which are situated in a locality of similar value.

- To facilitate such needs, templates can be created to define pricelists and specifications of a saleable property.
- Retrieve a template at the property unit level to ease data entry.
- Modify the retrieved values for any specific business scenario.

### Property information management

Property information is maintained with various details that is required to make a sale to a customer.

- Specify specifications that pertain to the property unit that will become part of the sale agreement.
- Define and maintain sale price of the property unit along with breakup of each component that constitutes the sale value.
- Maintain unlimited Unit types such as apartments, villas, office shops, kiosks etc.

### Presales management

The marketing and sales team will be able to respond to queries from prospects and customers with a quick turnaround time.

- Use Sales & Marketing for Lead & opportunity management and analysis with this integrated suite.
- Perform opportunity management, reservation analysis, and measure property sale revenues against targets.





## Quotation

- Generate multiple sale quotations along with a track of the lead or opportunity attached to it.
- Ability to amend quotation during negotiation with customer and such negotiation can be tracked in the system.
- Ability to resend the revised quotation to a customer.
- Update of quotation with statuses: created, confirmed, cancelled, and lost based on the sales stage

## Reservations management

Managing reservations made by customers and prospects for blocking properties is generally an area of concern and time consuming activity for property coordinators and managers. This suite helps manage the various aspects and functions that surround the reservation of a property unit.

- Receive customer payments against reservations made and knock-off the payments against the agreement or contract once signed.
- Cancel reservations if needed and refund the payments received after deducting cancellation charges.
- Convert reservations into agreements once the deal is firmed up.
- Handle reservation extensions and changes using a configured workflow setup.
- Facilitates accounting for multiple reservation payment by the customer.
- On generating reservation, Opportunity is created along with reservation which helps to have proportionate study on potential customer in the future.
- Reservation can be cancelled along with cancellation charges and amount refunded to customer can be accounted.

## Sale agreements

Property sale agreements with various terms and conditions can be created.

- Standard statutory information pertaining to the agreement can be entered and maintained.
- Modify agreement value and sale price elements based on various parameters to suit the specific customer requirements.
- Enable workflows and manage approvals by users based on the defined hierarchy.
- Finalize the agreement once approval is obtained.



### Change orders

The needs of each customer is different and it would be needed to create change orders given by a customer for an agreement. The

specifications requested in the change order, the associated price and the billing schedule should be attached to each change order.

### Agreement execution functions

From the moment, an agreement is signed, till it is handed over to the customer, there are various activities that must be performed and tracked.

- Create a billing schedule with prospective dates for raising invoices. Billing schedules may be created on an amount basis or on a percentage basis.
- Raise invoices against an agreement for the base agreement's payment schedule and for the payment schedule of related change orders.
- Cancel a change order or the whole agreement for such a case and accordingly refund or recover money from the customer.



Fig 4: Overall Features of RealEstatePro – Sales Management System



## Roles and responsibilities

The primary functions that form the backbone of the Real estate sales system have been outlined below:

1. Creating various properties and units based on the business process.
2. Sale agreement creation based on agreed terms.
3. Creating change orders for agreements.
4. Creating billing schedule, invoices and receiving payments against an agreement

## Additional functions that helps users manage day to day operations with ease

1. Searching for availability of properties based on the customer requirements.
2. Managing unit rent pre-sale through quotations.
3. Reserving a unit for a defined period to ensure the unit is blocked for a prospect or customer.
4. Cancelling an agreement or change order based on changing customer requirements.
5. Tracking inspections and work completions during a project progress.
6. Handing over a unit to the customer after inspection.

## Summary

With growing market demands and ever changing customer needs, it is imperative to have a robust solution to cater to what is demanded. The RealEstatePro add on of Dynamic Netsoft provided the much-needed agility and robustness to the business user. The time is just right to go to the market armed with superior capabilities and exceed customer expectations and grow!

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For more information about RealEstatePro on Dynamics 365 for Operations, visit <http://www.dnetsoft.com/realestatepro/>

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