

WHITE PAPER



# Leveraging CRM for Property Management with Open ERP





Exceed customer expectations with Open ERP to build relationships and a stronger brand. With Open ERP-driven CRM best practices, your property management company can scale reliable stakeholder and customer satisfaction, time after time.

## Real Estate Features

Within the broad USA Odoo community, many people have collaborated to create a property management system that has been used successfully in commercial, residential, and multi-unit circumstances. Our experience with using this configuration of USA Odoo has been successful and would provide the basis of this project.

### **This configuration provides features such as:**

- + Property definitions, including embedded videos, pictures, and other marketing information
- + Tenant records and contract/lease management
- + Property maintenance
- + GFA, operational cost, investment, and occupancy analysis and reporting

See examples of these features below.

# Property Definitions

## Diamond Crest

P/00003

Get Location
 0 Entries

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<b>Address</b>	Mortensen Avenue	<b>Parent Property</b>	
	Salinas California 93905	<b>Property Type</b>	Bungalow
	United States	<b>Property Manager</b>	ASUSTeK
<b>Date</b>	07/14/2016	<b>Furnishing</b>	Full Furnished
<b>No of Towers</b>	0	<b>Bedrooms</b>	3
<b>GFA(Sqft)</b>	100.00	<b>Bathrooms</b>	2
<b>GFA(m)</b>	9.29	<b>Facing</b>	West
<b>Video URL</b>	//www.youtube.com/embed/mwuPTi8AT7M?rel=0	<b>Income Account</b>	100000 Fixed Asset Account
<b>Currency</b>	USD	<b>Property Category</b>	Property - 3 Years
<b>Active</b>	<input checked="" type="checkbox"/>	<b>Property Management Company</b>	YourCompany

General
Depreciation Board
History
Sub Properties
Occupancy
Property Budget
Rents,Rates & Tenancy

Utility,Insurance & Safety Certificate
Maintenance
Purchase And Sale Details
Nearest Places
Photos & Documents

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<b>Gross Value</b>	\$ 1,000,000.00	<b>Computation Method</b>	Linear
<b>Salvage Value</b>	\$ 0.00	<b>Time Method</b>	Number of Depreciations
<b>Residual Value</b>	\$ 1,000,000.00	<b>Prorata Temporis</b>	<input type="checkbox"/>
<b>Partner</b>		<b>Number of Depreciations</b>	5
		<b>Number of Months in a Period</b>	12

### Notes

# Property Maintenance

Property Maintenance Q |

[Create](#) [Import](#) 14 of 4   

Property	Type	Date	Action	Assign To	Account Code	Cost	Status
<input type="checkbox"/> Diamond Crest	Gas Connection	07/14/2016	Repair	ASUSTeK, Joseph Walters	111100 Account Payable	140.00	Draft
<input type="checkbox"/> Diamond Crest	Air Conditioner	07/14/2016	Renew	ASUSTeK, Joseph Walters	111100 Account Payable	190.00	Draft
<input type="checkbox"/> Diamond Crest	Electricity	07/14/2016	Repair	ASUSTeK, Joseph Walters	111100 Account Payable	1,500.00	Draft
<input type="checkbox"/> Diamond Crest	Electronic Items	07/14/2016	Repair	ASUSTeK, Joseph Walters	111100 Account Payable	170.00	Draft

# Tenant Records & Contract/Lease Management

## Tenancy-001

T/00001

[▶ Start](#) [Deposit Receive](#)

### Property Information

Property	Diamond Crest	Date	07/14/2016
Tenant	Malay Khamar	Account Manager	
Tenancy Rent	\$ 12,000.00	Company	YourCompany
Deposit	\$ 5,000.00	Penalty (%)	0.00
Penalty Count After Days	0	Currency	USD

### Tenancy Deposit

Deposit Received?	<input type="checkbox"/>	Type of Scheme	
Deposit Returned?	<input type="checkbox"/>	Contact	
Deposit Returned	\$ 0.00		

- [Rent Schedule](#) [Contract Information](#) [History](#) [Budget Lines](#)

### Renewal

Start Date	07/14/2016	Rent Type	1 Month(S)
Expiration Date	01/14/2017	Total Rent	\$ 72,000.00
Tenancy Contract			

### Terms and Conditions

# GFA, Operational Cost, Investment, and Occupancy Reporting

GFA Analysis			
<input type="button" value="↗"/> <input type="button" value="✕"/> Measures ▾			
	- Total		GFA(Sqft)
	+ Bungalow	+ Flat	
	GFA(Sqft)	GFA(Sqft)	GFA(Sqft)
- Total	700.00	600.00	1,300.00
+ Cleveland		100.00	100.00
+ Cloud Haven		100.00	100.00
+ Dawson Drive	100.00		100.00
+ Diamond Crest	100.00		100.00
+ Glohork Villa	100.00		100.00
+ Golden Villa	100.00		100.00
+ Grimfield	100.00		100.00
+ New Piazza		100.00	100.00
+ Royal Manor	100.00		100.00
+ Siddhraj Zavod	100.00		100.00
+ Silver Rock		100.00	100.00
+ Trek Rise		100.00	100.00
+ White Villa		100.00	100.00

Investment Analysis			
<input type="button" value="↗"/> <input type="button" value="✕"/> Measures ▾			
	- Total		ROI
	+ Bungalow	+ Flat	
	ROI	ROI	ROI
- Total	5.00	0.00	5.00
+ Cleveland		0.00	0.00
+ Cloud Haven		0.00	0.00
+ Dawson Drive	0.00		0.00
+ Diamond Crest	5.00		5.00



# Conclusion

Finally, your property management company's data, talent, and resources can be deployed to drive your bottom line. Our highly skilled Open ERP experts are focused on finding and configuring your unique competitive advantage to harness your full potential.

The accounting integration from USA Odoo empowers your property management company with real-time accounting valuations and deeper reporting on costs and revenues for both upstream and downstream operations.

Integrating your accounting systems into an interconnected nerve system increases the reliability of your numbers, efficiency of your operations, and quality of your output. Open Source Integrators will help you create one true picture of your entire business operation. With the right accounting-centric Open ERP software capability, the challenge of defining your key demographics will become simple.



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## Contact us



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