

Property Management

Ultimate Shipping Solutions

**ULTIMATE
SOFTWARE**

Key processes

The contract

Leases

Properties

Agreements/pricing

Services and fees

Resource management

Lease and project
follow-up

Automatic calculation



Property management

The Property management module is an administrative system for handling lease contracts, lease on buildings, areas, services, fees etc. as well as payments related to this. On the basis of entered information the module can automatically generate a lease-invoicing proposal, which is used for the final invoicing. The Property management module is made for ports and therefore fully integrated with the other Port solution functionality, such as Services, Duties, Calls, and Projects.

The Contract

The main feature is the contract (lease agreement) with the related leases. The contract contains all information about the individual lease agreements. You can attach an unlimited number of leases per contract. On the contract information such as size, payment addresses, reminder list, status history, payment frequency and date control of lease changes can be attached. Furthermore it is possible to display statistics of the lease agreements.

Leases

The term lease is used in a broader sense, as it is possible to create an unlimited number of lease types, e.g. leases with or without building, flat, office, shop, on account collections, deposits, etc. A lease is always created in connection with a contract (lease agreement). On the individual lease information and functionality is attached and used e.g. as starting point for the automatic rent calculation.

Properties

The property data contain information on the individual property such as floor, leases, property manager, GIS integration, size, property tax, value assessment, location, history log. Property data is used in connection with entering into contracts/ leases and the maintenance of contracts.

Price Agreements and Pricing

Calculation of rental costs for customers and contracts and leases uses the standard price/discount matrix in Microsoft Dynamics AX™. There is optional setup of payment frequency, starting period and collection cycle.

Services and Fees

The Property and Area management module uses the concepts of fees and services related to the lease and the contract. The fees can be fees for inspection, property management, maintenance, heating, water supply, electricity etc. The fees constitute the basis of invoicing and are entered manually or generated automatically on the basis of registered services, which is a collection of fees or jobs. The services can be physical actions as well as fees. A service set is a number of pre-defined services with possible attached resources which can be expected for a certain kind of contract, lease or task. The service sets can be attached to each individual contract, lease and/or customer. The recorded fees and services on the contract and the lease, forms the basis of invoicing. Depending on the setup invoicing can be done in one keystroke!

Resource management

Through resource handling you can define, maintain, schedule and display usage of resources. Resources could be machines, personnel, tools, vessels, cranes, quays, trucks, railway wagons etc. Functionality has been added to resource management to make it possible to manage and plan the use of resources in the module needed for inspections, handling, maintenance etc.

Lease and project follow-up

All contracts and tasks can be attached to a specific project. In connection with a customer inquiry, services can be used as basis for bidding, and data can be used to perform budgeting on the task. These figures can be transferred to the project when the task is accepted. Furthermore it seems natural to transfer the costs of the enterprise in relation to the task to the project.

Automatic Rent Calculation

Rent calculation (invoice proposal) can be generated automatic in one key stroke. The calculation also includes rent increase during the period, retrospective changes in agreements, payment frequency and on account payment.

Feature Highlights

- Properties
- Contracts
- Leases
- Security
- Services
- Resource handling
- Invoicing

Mass approval and invoicing

After generating the invoice proposal it is possible to perform single or mass approval and transfer the proposal to sales orders and to do the final invoicing.

Properties

- Property setup
- Floors and leases
- Size, land register, municipality, Real estate tax etc.
- Addresses and locations
- Show property on map (e.g. Google Maps)

Contracts

- Control and manage all building and area leases
- Addresses, customer, tenant, reminder list, status history, payment and date control
- Leases
- Sublease
- Lenders
- Services and inspections
- Manage resources for inspections, handling, maintenance
- Easy follow up on cost and revenue

Leases

- Lease terms and conditions (invoicing, price, dates etc)
- Lease start and end date, next invoice date etc.
- Lease addresses, location and land register
- Warranty
- Handling final settlement for heating, water supply, electricity
- Handling increase in prices
- District plans

Benefits

- Fully integrated with other Port functionality such as services, duties, calls, projects, etc.
- Easy follow up on cost and revenue
- Easy budgeting on tasks
- Invoicing can be done in a single keystroke
- Control and manage building and area leases
- Handling of Leases and sublease
- Automatic rent calculation

Security

- Security codes and levels
- Employee security

Services

- Control fees for maintenance, heating, water supply, electricity
- Service set/templates
- Tariffs, calculation methods and calculation
- Contribution
- Invoicing

Resource handling

- Scheduling including Gantt chart
- Calculating hours
- Forecast and actual hours
- Cranes, Personnel, Vessels, Quays, Trucks, Railway wagons, Machines etc

Invoicing

- Rent calculation
- Automatically create invoice proposals
- Invoicing rent and fees