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On-premise and cloud solutions with Microsoft Dynamics NAV or Microsoft Dynamics 365 Business Central

Available functionality is dependent on the Microsoft Dynamics licence type and deployment options.

Find out more

Contact eBECS and request a meeting with one of our Dynamics experts.

Email info@ebecs.com or call +44 (0)8455 441 441.

eBECS Property Management Accelerator for Microsoft Dynamics

Overview

Most organisations either own or lease property in some form, be this retail stores, warehouses or office space. Other organisations, meanwhile, manage commercial or domestic property portfolios.

The eBECS Property Management Accelerator for Microsoft Dynamics provides a fully integrated solution for managing property, covering property information, maintenance, rent expenditure and income, service charges and jobs.

Property management can be configured to meet the needs of different types of organisation, from those who need to manage a retail or hospitality estate which may contain owned or leased properties, to those managing office buildings or a portfolio of commercial or domestic properties.

Close linking with Microsoft Dynamics' strong sales and purchase invoice handling allows rent and service

agreements to be created and associated invoices and credit memos periodically generated. Rent reviews can be undertaken and service charges allocated if properties can be sub-let. Property management is fully integrated with accounts, sales and purchase ledgers, service orders and jobs, removing duplication of information. Additional processing and full cost, income and profitability of properties are also easily accessible in statistical view and reports. Rental income and expenditure, maintenance service orders and refurbishment jobs are reflected in cash flow reporting.

Microsoft Dynamics' service and job modules have been integrated and enhanced to cover property maintenance (internal and sub-contract) and refit or refurbishments. Maintenance tasks for properties or fixed assets associated with properties can be recorded, quoted and scheduled for either internal maintenance or third-party organisations. Assets associated with a property can have preventative maintenance tasks scheduled, potentially reducing future issues.

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Property Management

The core of the property module is the property card itself. This holds details of the property such as address, property type, map, rental history, maintenance history, tenancy history and notes. A property can be linked with a Microsoft Dynamics location if it is a retail store or operational location.

Properties can also hold an unlimited number of user-definable property attributes to hold additional information — for example, number of bedrooms, or floor space. These attributes are searchable to allow properties meeting specific criteria to be listed or displayed on a map.

Documents may be held against a property, such as insurance documents or agreements and standard contracts and letters generated. Multiple pictures may also be held against a property.

A property may be sub-divided into related properties — for example, a property with flats that will be rented separately or an office that may be sub-let. For these types of properties, maintenance charges may be defined at the top-level property and allocations set-up to determine how the charges will be allocated.

Fixed assets may also be associated with a property, which is useful for operational locations or for properties that have assets requiring specific service intervals or preventative maintenance.

The majority of the costs associated with managing a property portfolio relate to collection and payments of rents and service charges. The property management module contains functionality to both collect and pay rental charges. Rent agreements allow agreements for either rent income or expenditure to be defined and associated with customers and suppliers. The rent agreement allows periodic rent invoices and credit memos to be generated to cover rent charges.

Service charges — for example, ground rent, communal area maintenance or building maintenance — may be defined and reviewed separately. Where a property may have 'child' properties such as flats or sub-let offices, then charges can be defined on the parent property and allocated accordingly. Rent and service charges can be periodically reviewed with a view to amending them (in line with RPI for example).

The property management module is fully integrated into Microsoft Dynamics for sales and purchase invoicing and credit control. Rental income and expenditure, maintenance service orders and jobs can be included in cash flow forecasting.

Property Maintenance

For companies managing a property portfolio, one of the biggest overheads in terms of management time is managing repairs and maintenance to properties. Property maintenance requests may be raised internally or by tenants of properties. Maintenance may be the responsibly of the organisation, landlord or a third-party but will always need to be recorded and monitored.

Existing service order functionality has been enhanced to support property maintenance.

Service orders may be raised against a property or a particular fixed asset associated with a property and may be handled by either an internal maintenance team or third-party maintenance suppliers. Preferred maintenance suppliers may be specified per work category against each property.

Microsoft Dynamics' strong existing service management functionality has been further enhanced to support both sub-contract service orders and internal service orders. Sub-contract service orders allow users to create service orders where the work will be done by an external sub-contractor. Internal service orders allow service orders to be raised to allow a company's properties or fixed assets to be repaired or maintained by an internal team.

Other improvements to the standard service module allow a map-based despatch board to be shown allowing service jobs to be scheduled more efficiently. Improved KPIs also allow a better view of the performance of service engineers.

Maintenance history and associated costs are tracked against each property for reporting and analysis.

Property management also fully integrates with the Microsoft Dynamics jobs module allowing complex jobs associated with a property, such as shop refits or property refurbishments, to be undertaken.

Enhancements in this area allow jobs to be raised for internal projects in addition to jobs raised for customers and true sales quotes to be produced for potential projects.

Items purchased as part of a refurbishment job can automatically be converted to fixed assets associated with a property on completion of the job.

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About eBECS, a DXC Technology Company

eBECS is an award-winning Microsoft Gold Partner delivering **Total Microsoft Business Solutions** and **Managed Services** globally that help customers digitally transform their businesses, cut complexity and cost, improve customer service and drive growth. We do this using tailored, industry-focused Microsoft Dynamics 365 solutions that embrace Finance & Operations (AX and NAV ERP), Sales, Marketing, Customer Service (CRM), Talent/HR, Field Service, Project Service Automation, Analytics, BI and IoT — on-premises or in the Microsoft Azure intelligent cloud.

DXC Technology (DXC: NYSE) is the world's leading independent, end-to-end IT services company, helping clients harness the power of innovation to thrive on change.