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Property Management

Streamlined Property & Loan Management

iboard	Properties															-	Add	New	Prop	perty
perties	Search		Bank	L	ot		Subd		Loan Start Date		Over 365	M	larket/Sold							
orts 🗸	Q Bank name		All	~	All	~	All	~	MM/DD/YYYY		All	•		Closed	Search	×			Expo	ort
	All Properties															Show c	ırchiv	ed pr	oper	tites
	Bank	Lot	Subd	Loan Start Date	¢↓	Days active	t↓ ·	Over 365 ↑↓	Current Loan Balance	Loan	Amount	Market/Solo	I Closing Date	List Price	Current Incentive	Job Cost				
	Bancorp South	16	WF	MM/DD/Y	YYY	664		True	\$3,46,320	\$3,48	,000	Sold	MM/DD/YYYY	\$6,59,900	\$10,000	\$3,14,000.00	۷	0	•	8 6
	Bancorp South	16	WF	MM/DD/Y	YYY	664		False	\$3,46,320	\$3,48	,000	Market	MM/DD/YYYY	\$6,59,900	\$10,000	\$3,14,000.00	2	0	7	Ż
	Bancorp South	16	WF	MM/DD/Y	YYY	664		True	\$3,46,320	\$3,48	,000	Sold	MM/DD/YYYY	\$6,59,900	\$10,000	\$3,14,000.00	2	0	7	Ň
	Bancorp South	16	WF	MM/DD/Y	YYY	664	1	False	\$3,46,320	\$3,48	,000	Market	MM/DD/YYYY	\$6,59,900	\$10,000	\$3,14,000.00	2	0	2	ŝ
	Bancorp South	16	WF	MM/DD/Y	YYY	664	1	False	\$3,46,320	\$3,48	,000	Market	MM/DD/YYYY	\$6,59,900	\$10,000	\$3,14,000.00	۷	0	•	ä
	Bancorp South	16	WF	MM/DD/Y	YYY	664		True	\$3,46,320	\$3,48	,000	Sold	MM/DD/YYYY	\$6,59,900	\$10,000	\$3,14,000.00	۷	0	•	Ô
	Bancorp South	16	WF	MM/DD/Y	YYY	664		True	\$3,46,320	\$3,48	,000	Sold	MM/DD/YYYY	\$6,59,900	\$10,000	\$3,14,000.00	2	0	2	×
	Bancorp South	16	WF	MM/DD/Y	YYY	664		False	\$3,46,320	\$3,48	,000	Market	MM/DD/YYYY	\$6,59,900	\$10,000	\$3,14,000.00	∠	0	·	ä
	Bancorp South	16	WF	MM/DD/Y	YYY	664		True	\$3,46,320	\$3,48	,000	Sold	MM/DD/YYYY	\$6,59,900	\$10,000	\$3,14,000.00	4	0	7	Ň
	Bancorp South	16	WF	MM/DD/Y	YYY	664		True	\$3,46,320	\$3,48	,000	Sold	MM/DD/YYYY	\$6,59,900	\$10,000	\$3,14,000.00	1	0	•	ŝ

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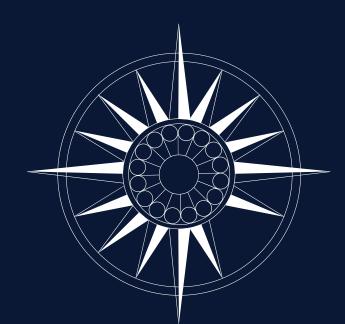
About the project

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This property management application is designed to streamline and enhance the administration of property details, user management, and loan tracking. It allows administrators to manage user roles, add and edit property and loan information, and generate comprehensive reports for efficient decision-making. Built to simplify complex property management tasks, the system ensures accurate data handling and provides a clear overview of all property-related activities.

About the client

David Luckey, president of Southeastern Building Corporation and a thirdgeneration builder from the US, delivers quality craftsmanship and distinct designs in homebuilding and commercial projects. His company transforms dreams into reality with exceptional customer service and meticulous planning from concept to completion.



Tech stack





.NET Core





HTML

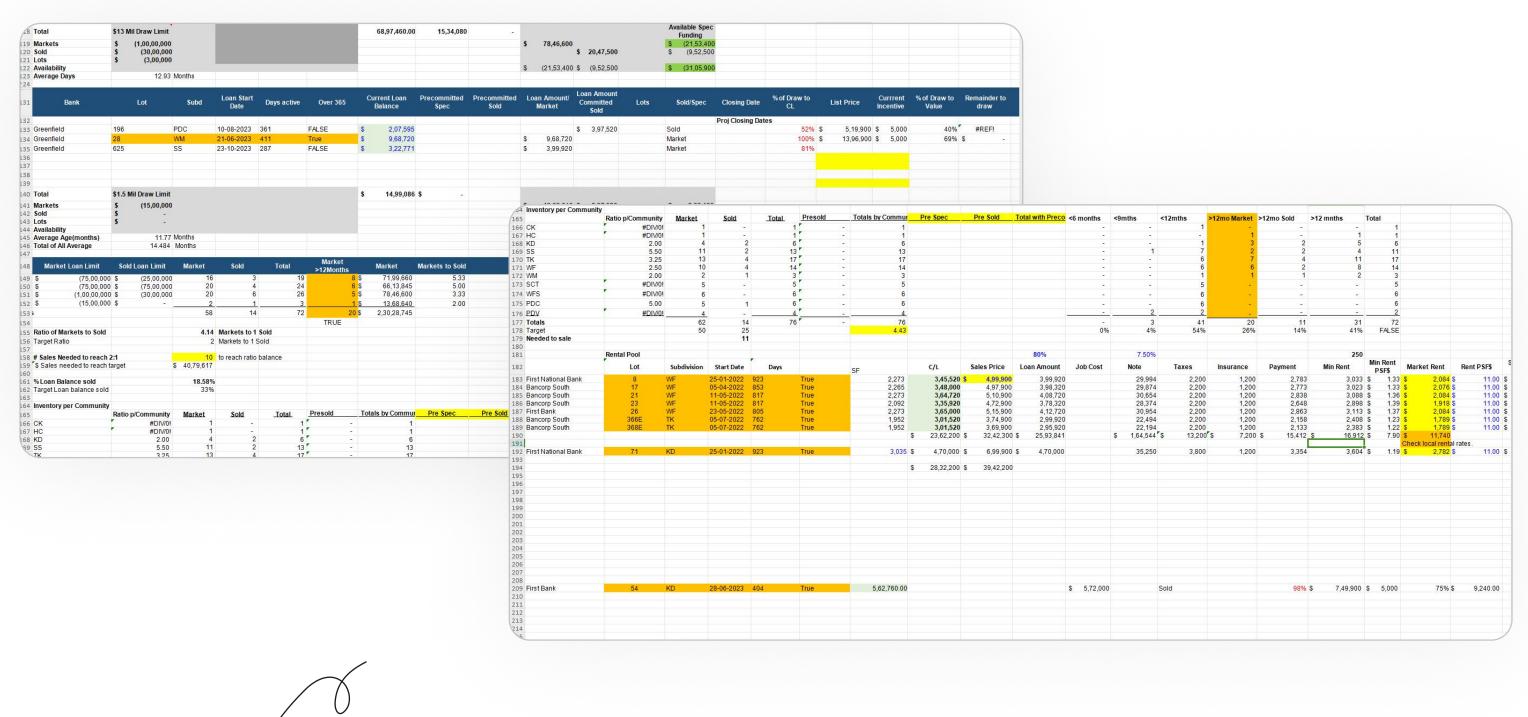


Angular

MS SQL Server

Project Requirement

Our client was managing a large volume of data across multiple Excel sheets, updating them monthly by copying and pasting previous data and changing variable information like the remaining principal amount, new loan details, current loan amounts, bank statement/Summary, and many more details while keeping other fixed data unchanged. This manual process made it difficult to manage data, and any mistakes required checking each sheet, which was quite a task. With the new data coming in, they needed to continuously update their historical records. Managing this data manually each day proved to be difficult and took up most of the employees' time, which left them with little opportunity to focus on new ideas and improvements. So, The client was looking for a solution to streamline their data management.



Southeastern								John Doe
🔗 Dashboard	Property Details							an y dig a taan dig kanala da gana ar yang
	Bank	: Bancorp South	Lot	: 16	Subd	: WF	Notes	
▶ Reports ∨ ♥ Users	Current Loan Balance	: MM/DD/YYYY : \$3,46,320 : Market	Days active Precommited Spec List Price	: 665 : 50 : \$4,67,900	Over 365 Loan Amount Current Incentive	: True : \$3,48,000 : \$10,000	John Doe Lorem Ipsum is simply dummy text industry. Lorem Ipsum has been th ever	
 	% of Draw to Value	: 2,529,96 : 74% : \$250	Job Cost Remainder to draw	: \$3,14,000.00 : \$200	% of Draw to CL Extra Lot Costs	: 100% : \$100	John Doe Lorem Ipsum is simply dummy text industry. Lorem Ipsum has been th ever	
						Edit	John Doe Lorem Ipsum is simply dummy text	06/22/2024 of the printing and typesetting
	Monthly Interest				Loan Bala	ance		Current: \$300
	Username	Change Date	Past Interest	Current Interest	Username	Change Date	Past Balance	Current Balance
	John Doe	06/22/2024	09.00	10.00	John Doe	06/22/2024	\$2000	\$1800
	John Doe	06/22/2024	09.00	10.00	John Doe	06/22/2024	\$2000	\$1800
	John Doe	06/22/2024	09.00	10.00	John Doe	06/22/2024	\$2000	\$1800
	John Doe	06/22/2024	09.00	10.00	John Doe	06/22/2024	\$2000	\$1800
	John Doe	06/22/2024	09.00	10.00	John Doe	06/22/2024	\$2000	\$1800
	John Doe	06/22/2024	09.00	10.00	John Doe	06/22/2024	\$2000	\$1800

Solution

After thoroughly assessing the situation, we developed a tailored solution to address the client's issues with managing data through spreadsheets. We migrated all their data into a custom property and loan management application, effectively eliminating the need for manual updates. This solution streamlined their processes and saved valuable time. Now, the client only needs to update 2-3 details manually, as the application automatically manages everything else, including yearly and monthly loans, interest rates, and new loan plans.

Modules of Property Management Application

Dashboard

The Property Management Dashboard provides an overview of key metrics, including properties under construction, specs, sold properties, and construction loan details. The dashboard also displays data from previous years for verification purposes and selects specific years to check metrics, ensuring efficient and accurate property management. This tool helps manage and analyze property details efficiently, ensuring up-to-date and accurate information is always available.

⑦ Dashboard	Dashboard			
⚠ Properties	Loan Start Date			
🖸 Reports 🗸	MM/DD/YYYY 🛱 Search			
9 Users	Overall Summary			
	Total under construction	Total Spec (target 66%)	Total Sold (target 33%)	Sold to Spec Ratio (target 2/1)
🟦 Banks	76	62	14	4.14
🕑 Logout	Average Age	Oldest Construction Loan Origination	Months of Oldest C/L	
	8.22 Months	05/24/2019	24.87 Months	
	Units over 12 Months- NEED ATTENTION			
	Total units over 12 months	Total Sold Units	Total Market Units over 12 months	Total % inventory > 1 year spec
	13	3	10	13%

⑦ Dashboard	Add New I	Property								
h Properties	Basic Details	;								
🖸 Reports 🗸	Select Bank			Select Lot			Select Subd			
Reports •	Select bank			Enter lot			Enter subd			
C Users	Loan Details									
it Banks	Loan Start De	ate		Current Loan B	alance		Precommited Sp	pec		Loan Amount
	MM/DD/YY	YY		Current Loan	Balance		Precommited S	Spec		Loan Amount
) Logout	Market/Sold			Loan Closing D	late					
	Market			 MM/DD/YYYY 		Ē				
	Other Details									
	List Price	•		Current Incenti	ve		Monthly Interest			Job Cost
	List Price			Current Incen	tive		Monthly Interes	st		Job Cost
	5 × 1 × 0			Extra Framing (_					
	Extra Lot Cos			Extra Framing			Notes Notes			
	Extra Lot Co		Draw to Value: 20	Extra Framing		Active: 25	Notes			Save
	Extra Lot Co		Draw to Value: 20			s Active: 25 Ov	Notes			Save
	Extra Lot Co	CL: 50% % of [Draw to Value: 20	Extra Framing			Notes	Current: \$300	Notes	Save
	Extra Lot Co % of Draw to	CL: 50% % of [Draw to Value: 20 Past Interest	Extra Framing	Costs draw: \$100 Days		Notes	Current: \$300 Current Bolance	Notes Notes	Sove
	Extra Lot Co % of Draw to Monthly Ir	CL: 50% % of [Extra Framing	Costs Iraw: \$100 Days	ince	Notes			
	Extra Lot Co % of Draw to Monthly Ir Username	CL: 50% % of [hterest Change Date	Past Interest	Extra Framing Extra Framing I Remainder to a	Costs draw: \$100 Days Loan Balc Username	INCE Change Date	Notes er 365: True Past Balance	Current Balance	Notes John Do	e 06/22/202 um is simply dummy text of the printing and typesetting liadust
	Extra Lot Co % of Draw to Monthly In Username John Doe	CL: 50% % of [hterest Change Date 06/22/2024	Past Interest	 Extra Framing Remainder to c Current Interest 10.00 	Costs iraw: \$100 Days Loan Balc Username John Doe	Change Date 06/22/2024	Notes er 365: True Past Balance \$2000	Current Balance \$1800	Notes John Do Lorem Ipsi Lorem Ipsi	e 06/22/202 um is simply dummy text of the printing and typesetting indust um has been the industry's standard dummy text ever
	Extra Lat Co % of Draw to Monthly In Username John Doe John Doe	CL: 50% % of I terest Change Date 06/22/2024 06/22/2024	Past Interest 0900 0900	Extra Framing K Remainder to a Current Interest 10.00 10.00	Costs draw: \$100 Days Loan Balc Username John Doe John Doe	Change Date 06/22/2024 06/22/2024	Notes er 365: True Past Balance \$2000 \$2000	Current Balance \$1800 \$1800	Notes John Do Lorem Ipsi Lorem Ipsi John Do Lorem Ipsi	e 06/22/202 um is simply dummy text of the printing and typesetting indust um has been the industry's standard dummy text ever e 06/22/202 um is simply dummy text of the printing and typesetting indust
	Extra Lat Co % of Draw to Monthly In Username John Doe John Doe John Doe	CL: 50% % of D ************************************	Past Interest 0%00 0%00 0%00 0%00	Extra Framing K Remainder to c Current Interest 10.00 10.00 10.00	Costs iraw: \$100 Days Loan Balc Username John Doe John Doe John Doe	Change Date 06/22/2024 06/22/2024 06/22/2024	Notes er 365: True Past Balance \$2000 \$2000 \$2000	Current Balance \$1800 \$1800 \$1800	Notes John Do Lorem Ipsi Lorem Ipsi John Do Lorem Ipsi	e 06/22/202 um is simply dummy text of the printing and typesetting indust um has been the industry's standard dummy text ever

The system includes comprehensive reports such as bank

reports, key metrics, and inventory reports, covering

Additionally, it provides quarterly reports, data on sold

properties, annual summaries, and target reports. All

reports can be easily managed within the system.

monthly details of properties, loans, and banks.

Properties

This module manages comprehensive property details, including bank information, loan start date, current loan balance, and the property's status (available or sold). Users can view detailed information about each property through the "View" tab in the action column. Additionally, users can edit the current interest and loan balance. When updated, the previous values are recorded as past interest and balance, and the new values are automatically updated. The application also records the date of any edits. Furthermore, the module facilitates easy data export, enabling efficient management and tracking of property details.

) Dashboard	Key Metric Report															
Properties	From		То			Mor	nth of oldest C/	L								
] Reports 🗸	05-04-2022	Ħ	05-04	-2022	Ē	All		✓ Seare	ch							
Key Metric	2023		<	2017-2032	>	y	March	April	May	June	July	August	September	October	November	Decembe
Bank-Summary	Total under construction	n	2017	2018	2019		59	61	66	65	60	69	71	70	71	2
Inventory Per Community	Total Spec (target 66%)		2020	2021	2022		59	61	66	65	60	69	71	70	71	2
	Total Sold (target 33%)		2023	2024	2025		59	61	66	65	60	69	71	70	71	2
Users	Sold to Spec Ratio (targ	et 2/1)	2026	2027	2028		59	61	66	65	60	69	71	70	71	2
Banks	Average Age (target xx)	months	2029	2030	2031		59	61	66	65	60	69	71	70	71	2
	Oldest Construction Loc	an Origin				2024	06/10/2024	06/10/2024	06/10/2024	06/10/2024	06/10/2024	06/10/2024	06/10/2024	06/10/2024	06/10/2024	06/10/20
) Logout	Months of Oldest C/L			25.5	25.5		25.5	25.5	25.5	25.5	25.5	25.5	25.5	25.5	25.5	25.5
	Units over 12 Months- NE	ED ATTE	NTION													
	2023			January	Februa	ry	March	April	May	June	July	August	September	October	November	Decembe
	Total units over 12 mont	ıs		64	64		59	61	66	65	60	69	71	70	71	2
	Total Sold Units over 12	nonths		64	64		59	61	66	65	60	69	71	70	71	2
	Total Market Units over	2 month	s	64	64		59	61	66	65	60	69	71	70	71	2
	Total % inventory > 1 yea	r spec		53%	58%		54%	30%	28%	27%	17%	17%	17%	14%	17%	17%
									200	2.10						

ihboard	Users					Add
perties	Search					_
	Q Search users	Search				
orts 🗸	All Users					
rs	Name	Contact No.	Email	Role	Is Active	
ks	Willie Tanner	+1 578-689-0254	willietaner22@gmail.com	Admin	Yes	
	Willie Tanner	+1 578-689-0254	willietaner22@gmail.com	Admin	Yes	
out	Willie Tanner	+1 578-689-0254	willietaner22@gmail.com	Admin	Yes	
	Willie Tanner	+1 578-689-0254	willietaner22@gmail.com	Admin	Yes	
	Willie Tanner	+1 578-689-0254	willietaner22@gmail.com	Admin	Yes	
	Willie Tanner	+1 578-689-0254	willietaner22@gmail.com	Admin	Yes	
	Willie Tanner	+1 578-689-0254	willietaner22@gmail.com	Admin	Yes	
	Willie Tanner	+1 578-689-0254	willietaner22@gmail.com	Admin	Yes	
	Willie Tanner	+1 578-689-0254	willietaner22@gmail.com	Admin	Yes	
	Willie Tanner	+1 578-689-0254	willietaner22@gmail.com	Admin	Yes	
	Willie Tanner	+1 578-689-0254	willietaner22@gmail.com	Admin	Yes	
	Willie Tanner	+1 578-689-0254	willietaner22@gmail.com	Admin	Yes	
	Willie Tanner	+1 578-689-0254	willietaner22@gmail.com	Admin	Yes	
	Willie Tanner	+1 578-689-0254	willietaner22@gmail.com	Admin	Yes	
	Willie Tanner	+1 578-689-0254	willietaner22@gmail.com	Admin	Yes	
	Willie Tanner	+1 578-689-0254	willietaner22@gmail.com	Admin	Yes	
	Willie Tanner	+1 578-689-0254	willietaner22@gmail.com	Admin	Yes	
	Willie Tanner	+1 578-689-0254	willietaner22@gmail.com	Admin	Yes	
	Willie Tanner	+1 578-689-0254	willietaner22@gmail.com	Admin	Yes	

Users

Admins can efficiently add new users by entering their names, contact information, email, roles, and activation status. They can also edit user details as needed and easily locate any user information by using the search bar.

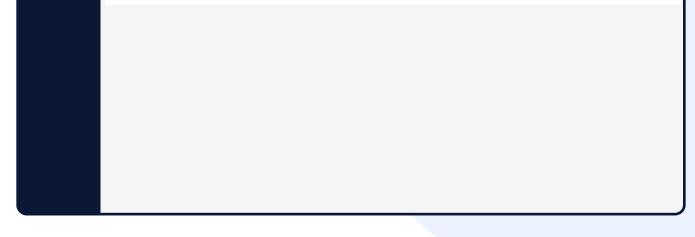
Southeastern					John
3 Dashboard	Banks				Add New Bar
1 Properties	Search				
🗈 Reports 🗸	Q Search bank name	Search			
<u>^</u>	All Properties				
2 Users	Bank Name	Markets	Sold	Lots	
奤 Banks	Bancorp South	\$15,00,000	\$200	16	2 😫
. . .	Bancorp South	\$15,00,000	\$200	16	🛃 🖄
🖞 Logout	Bancorp South	\$15,00,000	\$200	16	∠ 😫
	Bancorp South	\$15,00,000	\$200	16	∠ 😫
	Bancorp South	\$15,00,000	\$200	16	∠ 😫
	Bancorp South	\$15,00,000	\$200	16	۷ 🖻

Banks

Reports

Users/Admin can add new banks by entering details such

as bank name, market value, sold value, and lot information. They can search for bank details using the search bar, and manage visibility by archiving, showing, or hiding bank records as needed.



Screenshots of The Project

Company	Bank	Lot	Subd	Loan Start Date	Days active	Over 365	Current Loan Balance	Precommitted Spec	* Southeastern								Johr
	2 2 2								⑦ Dashboard	Property Details							
BC	Bancorp South	16	WF	05-04-2022		True	\$ 3,46,33			Bank	: Bancorp South	Lot	: 16	Subd	: WF	Notes	
BC	Bancorp South	585	SS	31-07-2023		True	\$ 4,53,3		🗈 Reports 🗸	Loan Start Date	: MM/DD/YYYY	Days active	: 665	Over 365	: True	John Doe Lorem Ipsum is simply dummy tex	06/22/ t of the printing and typesett
BC	Bancorp South	30	WF	15-08-2023	and the second se	FALSE	\$ 3,24,4	Contraction of the second s	Q Users	Current Loan Balance		Precommited Spec	: 50	Loan Amount	: \$3,48,000	industry. Lorem Ipsum has been t ever	
BC	Bancorp South	17	WF	05-04-2022		True	1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	00 Rental		Market/Sold	: Market	List Price	: \$4,67,900	Current Incentive	: \$10,000	John Doe	06/22/
BC	Bancorp South	141	HC	19-04-2022		True	\$ 6,80,0		🟦 Banks	Monthly Interest	: 2,529.96	Job Cost	: \$3,14,000.00	% of Draw to CL	: 100%	Lorem Ipsum is simply dummy tex industry. Lorem Ipsum has been t	t of the printing and typeset
BC	Bancorp South	21	WF	11-05-2022		True		20 Rental	🕐 Logout	% of Draw to Value	: 74%	Remainder to draw	: \$200	Extra Lot Costs	: \$100	ever	ne industry's standard dumm
С	Bancorp South	23	WF	11-05-2022		True		20 Rental		Extra Framing Costs	: \$250				Edit	John Doe	06/22,
C	Bancorp South	366E	тк	05-07-2022	762	True	\$ 3,01,5	20 Rental							Lun	Lorem Ipsum is simply dummy tex	t of the printing and typeset
IC	Bancorp South	368E	тк	05-07-2022	762	True	\$ 3,01,5	20 Rental		Monthly Interest	t			Loan Bala	nce		Currer
BC	Bancorp South	58	KD	31-07-2023	371	True	\$ 5,38,03	31		Username	Change Date	Past Interest	Current Interest	Username	Change Date	Past Balance	Current Balance
BC	Bancorp South	62	KD	31-07-2023	371	True	\$ 5,30,1	19		John Doe	06/22/2024	09.00	10.00	John Doe	06/22/2024	\$2000	\$1800
BC	Bancorp South	224	CK	15-08-2023	356	FALSE	\$ 3,10,7	36		John Doe	06/22/2024	09.00	10.00	John Doe	06/22/2024	\$2000	\$1800
BC	Bancorp South	59	KD	15-08-2023	356	FALSE	\$ 5,39,93	31		John Doe	06/22/2024	09.00	10.00	John Doe	06/22/2024	\$2000	\$1800
BC	Bancorp South	29	WF	15-08-2023	356	FALSE	\$ 3,57,4	18		John Doe	06/22/2024	09.00	10.00	John Doe	06/22/2024	\$2000	\$1800
BC DE	Bancorp South	216	WFS	18-08-2023	353	FALSE	\$ 3,37,1	36		John Doe	06/22/2024	09.00	10.00	John Doe	06/22/2024	\$2000	\$1800
BC	Bancorp South	217	WFS	18-08-2023	353	FALSE	\$ 3,37,1	36		John Doe	06/22/2024	09.00	10.00	John Doe	06/22/2024	\$2000	\$1800
BC	Bancorp South	218	WFS	18-08-2023	353	FALSE	\$ 3,37,3	91									
BC	Bancorp South	234	WFS	18-08-2023	353	FALSE	\$ 3,41,1	74									
	Bancorp South	235	WFS	18-08-2023	353	FALSE	\$ 3.45.5	15									

Bank Summary	Market Loan Limit	Sold Loan Limit	Market	Sold	Total	Market >12Months	Market	Markets to Sold		Sold	Southeastern		
Bancorp Sout \$	(75,00,000						<mark>8</mark> \$71,99,660			\$ 11,67			
First National \$							<mark>6</mark> \$66,13,845			\$ 16,40		Users	
First Bank \$					2	26	5 \$ 78,46,600			\$ 20,47	4 6 6		
Greenfield \$	(15,00,000	\$ -	2	2 1		3	13.68.640	2.00		\$ 3.97	520 In Properties	Search	
Totals			58	3 14	7	72 2	0 <mark>\$ 2,30,28,74</mark>	5		\$ 52,53	535 Reports V	Q Search users	Search
						TRUE						All Users	
R	atio of Markets to Sold		4.14	4 Markets to 1	Sold						Q Users		
Т	arget Ratio			2 Markets to 1 S	old							Name	Contact No.
											🟦 Banks	Willie Tanner	+1 578-689-0254
	Sales Needed to reach) to reach ratio	balance							Willie Tanner	+1 578-689-0254
\$	Sales needed to reach t	arget	\$ 40,79,617	7							(†) Logout	Willie Tanner	+1 578-689-0254
	Loan Balance sold		18.589									Willie Tanner	+1 578-689-0254
	arget Loan balance sold		339	10								Willie Tanner	+1 578-689-0254
In	ventory per Community											Willie Tanner	+1 578-689-0254
014		Ratio p/Community	Market	Sold	Total	Presold	Totals by Comm	ur Pre Spec	Pre Sold	Total with P	recc	Willie Tanner	+1 578-689-0254
C	K	#DIV/0!	1	- 1		1 -		1				Willie Tanner	+1 578-689-0254
н	IC	#DIV/0!	1	1 -		1 -		1				Willie Tanner	+1 578-689-0254
	D	2.00	4	4 2		6 -		6					
	S	5.50	11			13 -		3				Willie Tanner	+1 578-689-0254
	ĸ	3.25	13			17 -	· · · · · · · · · · · · · · · · · · ·	• 00 st				Willie Tanner	+1 578-689-0254
	VF.	2.50	10			14 -		4				Willie Tanner	+1 578-689-0254
	M	2.00	2	- 1		3 -		5				Willie Tanner	+1 578-689-0254
	CT	#DIV/0!	5	-		5 -		5					
	VFS	#DIV/0!	6	- 3		6 -		b				Willie Tanner	+1 578-689-0254
	DC	5.00	5	5 1		6 -		6				Willie Tanner	+1 578-689-0254
	DV	#DIV/01		- 1		4		4.				Willie Tanner	+1 578-689-0254
	otals		62		7	- 76						Willie Tanner	+1 578-689-0254
	arget		50				4.4	3					
N	eeded to sale			11								Willie Tanner	+1 578-689-0254
		Pental Dool								90%		Willie Tanner	+1 578-689-0254

Review

I was truly impressed with the property and loan management application Paresh and his team developed. The shift from complex Excel sheets to this smooth, custom application was seamless. Despite my limited time to oversee the process, They managed everything independently and delivered a solution that perfectly met our needs. Their proactive approach and willingness to go the extra mile were greatly appreciated. I will surely work with them in the future if required. If you're also facing similar challenges, I highly recommend giving ExcelHunters team a shot.



Need any more juicy details or have questions? Just hit the below link to schedule a call.

paresh@excelhunters.com | $\mathbf{\sim}$

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Schedule a call