



**Real Estate portfolio  
management**







## The most advanced and comprehensive Real Estate Management system.

REFTree enables comprehensive monitoring and intervention across all aspects of real estate management, significantly enhancing property profitability through continuous monitoring and evaluation of management processes.

Leveraging the specialized expertise of the REFTree team, it is possible to commission bespoke mobile applications for iOS devices. These applications facilitate the implementation of updates and modifications to application logic without necessitating publication on the Play Store or Apple Store.

### WHO WE WORK WITH



**Real Estate  
Management**



**Public  
authorities**



**Universities**



**Financial  
services**



**Saving  
funds**



**Pension  
funds**



**Retail**



**Religious  
bodies**



**Increasing the value of real estate assets  
through comprehensive activities carried out  
throughout the life cycle.**



**Know  
your assets**



**Optimize  
process**



**Evaluate  
performance**

# The product



REFTree is an informatic innovative platform that allows the integrated management of all the processes linked to the management of a property.



## OPEN INFORMATION

Thanks to a dynamic database, shared between the users and constantly enriched, it allows a real time overview of all the information's related to the property management.

Being part of the REFTree world, each client is included in a Real Estate community in which everyone can make their own knowledge contribution.

The simple informatic system evolves through the sharing of concepts and information in a digital collaboration environment that facilitates a constant development of the database.



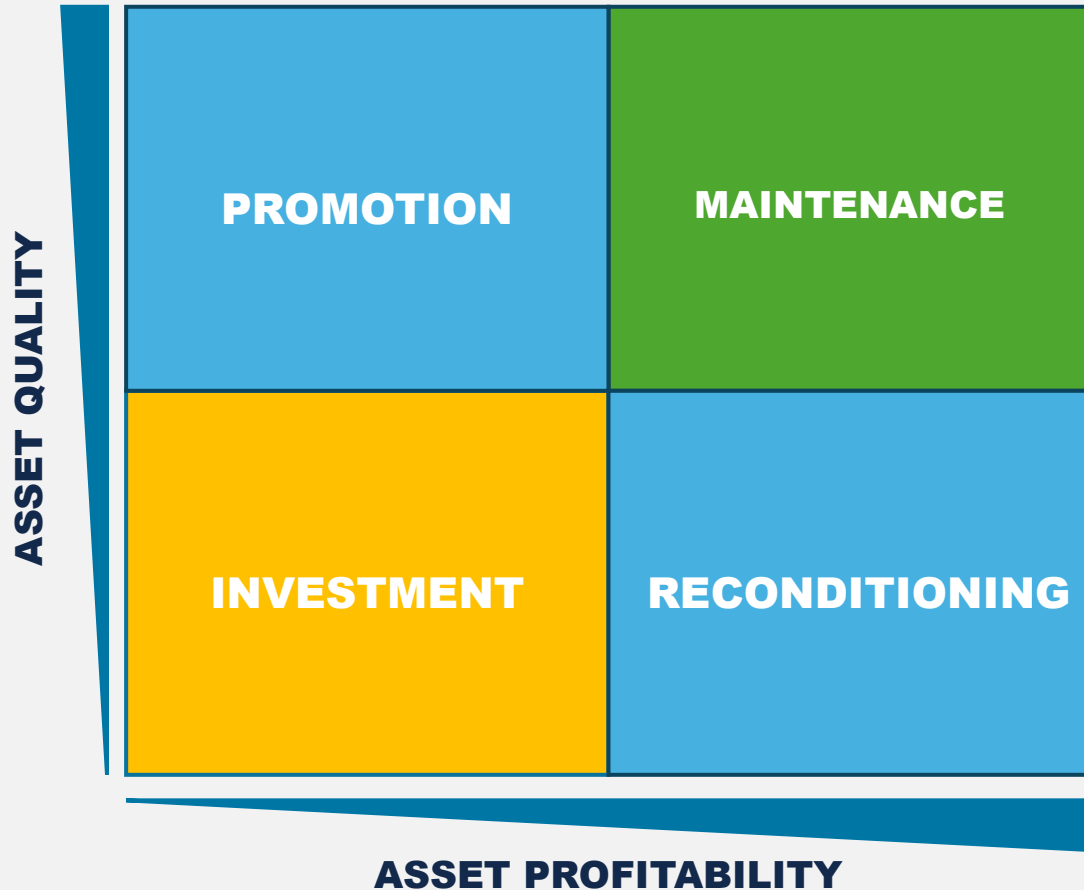
## OPEN TECHNOLOGY

Usable both on mobile and desktop thanks to a HTML5 based technology, REFTree is the optimal solution for a complete view of your portfolio and actual performance levels.

The use of online platforms with the look-and-feel of native desktop solutions makes the platform accessible from different devices, integrating multimedia (video, graphs, geolocation systems and data storage) and ensuring the possibility of online operations.

# Solution's goals

## PLANNING MATRIX



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### KNOWLEDGE OF THE PORTFOLIO

- normalization of knowledge database information
- deepening of administrative and technical census data
- integration between graphic and alphanumeric data

### INFORMATION SHARING

- the involvement of each user
- use of advanced technological tools with the help of integrated services and a virtual data room
- access to a significant set of data (current and historical)

### IDENTIFICATION OF NEW OPPORTUNITIES

- integration of management and evaluation databases
- Use of big data



# REFTree Features



## INTEGRATION

REFTree has a workflow system that is integrated with all operational modules. Thanks to a **dedicated dashboard area**, it is possible to **assign, monitor, and verify the state of activities**. It offers the possibility to parametrise automatic alerts any time a given event occurs.



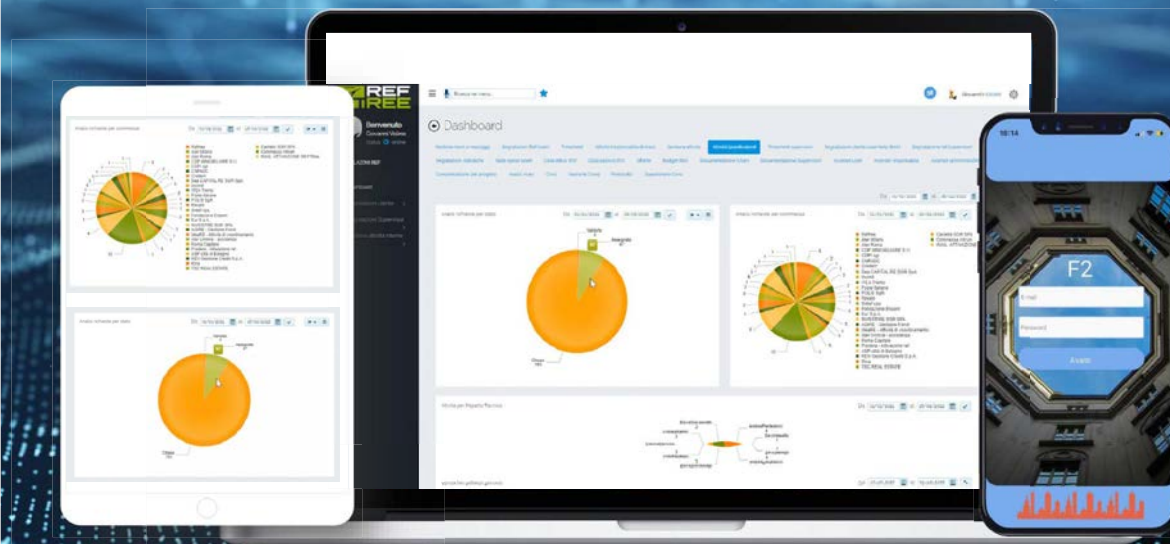
## CUSTOMIZATION

REFTree is **completely customizable** to comply and adapt to different operating scenarios and to be able to manage a variety of Real Estate portfolios. Each user has the ability to customize his/her own dashboard and to link its own mail to any Business Object within the system.



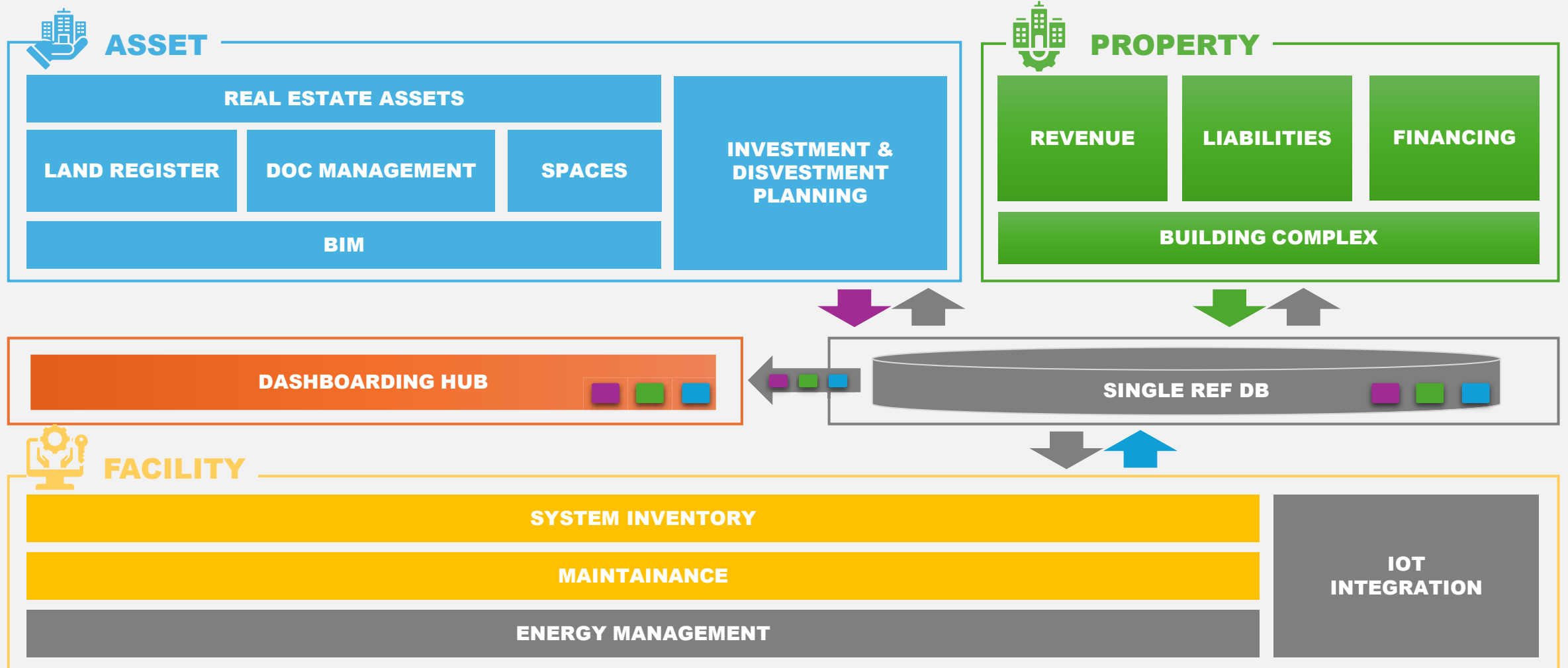
## SHARING

Thanks to the input of all users, REFTree builds a knowledge database that specifies means for real estate assets census and all the actions related to its management that are perfectly integrated with the system.



# Modules overview

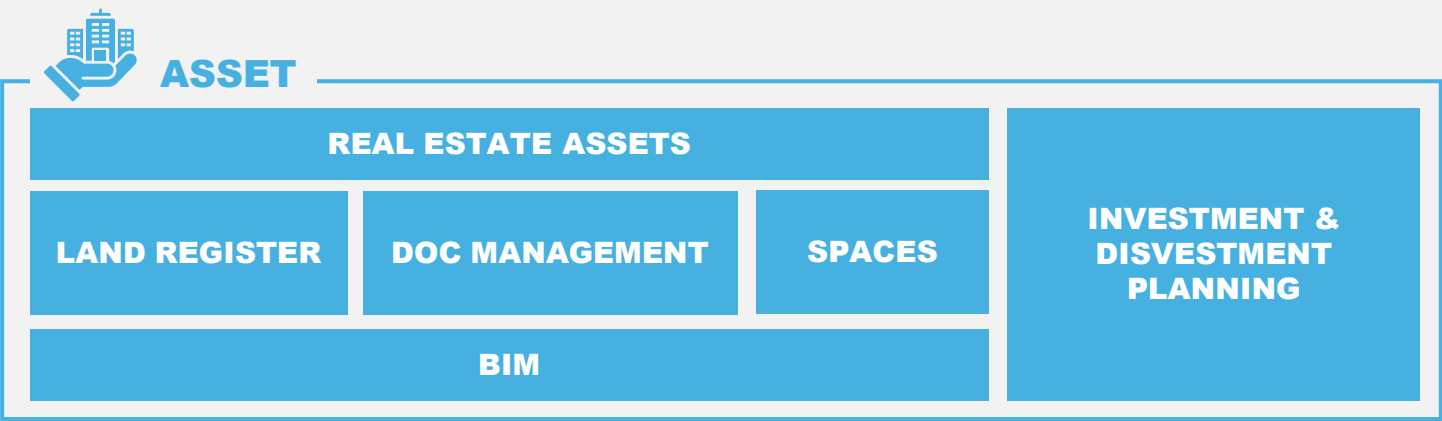
The REF system is structured in **three layers**: **Asset**, **Property**, and **Facility**. Each layer is composed of several functional tools, each of which implements specific activities and processes, sharing the same database, **SINGLE REF DB**, and one single monitoring and reporting tool, **DASHBOARDING HUB**.



# Asset layer



Activities and processes to guarantee the solidity and completeness of information relative to the Real Estate assets. It also fosters the assets' development, thanks to the area's ability to plan investment and divestment operations.



## REAL ESTATE PORTFOLIO

Management of all the real estate portfolio's core information. Native Integration in real estate with planimetry and BIM models. Due diligence. MEF supply.

## LAND REGISTER

Managing of cadastral data through the integration with the informative systems of the client. SISTER integration. OMI integration.

## DOCUMENT MANAGEMENT

Dematerialized management and virtual storage of all the documents referring to real estate assets. Virtual data room. Documents monitoring (deadlines and obligations).

## BIM

Building Information Modelling for integrated process management, and real estate data sharing. Synchronized updates. Metadata integration with BMS and sensors.

## SPACES

Management of graphic models (ex. Blueprint sand from the usage of associated data of spaces within Real Estate properties The system can manage the following filetypes : .dwg, .dxf, .rvt, .pln, .pla, .edf and .ifc)

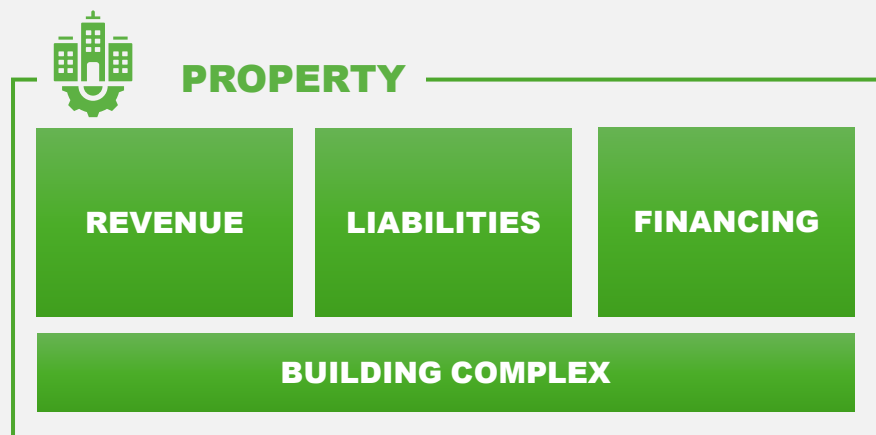
## PLANNING

Investments and divestments: management of data required by the strategic management to monitor and steer the level of profitability.

# Property layer

Conducting the administrative activities of managing the real estate assets as a whole and those necessary to gain margin from the portion of the income real estate assets.

The functions implemented through the modules that make up the Property layer are developed in accordance with the specifications of Italian legislation (e.g.: management of the active cycle, calculation of taxes, tax obligations for the registration of contracts), without therefore needing any further specific customizations.



## REVENUE

Management of all administrative activities from the signing of leases to their closure. Delinquency management, redelivery, communication with tenants.

## LIABILITIES

Management of the administrative activities related to the costs of asset management. Management of supplier register, assignments and purchases.

## FINANCING

Calculation of IMU, TARI / TEFA taxes. Historicization of rates, period calculation, tax consolidation. Preparation of IMU declaration models.

## BUILDING COMPLEX

Management of activities related to the conduction of leases used as condominiums. Census, processing of quota periods, control of divisions, assembly management.



# Facility layer

Integrated management of services, processes and activities related to conducting and planning works, aimed at ensuring the full functionality of the real estate assets and for the resolution of unforeseeable critical issues.



## FACILITY

### SYSTEM INVENTORY

### MAINTAINANCE

### ENERGY MANAGEMENT

### IOT INTEGRATION

#### SYSTEM INVENTORY

Configuration, census and management of all real estate assets. BIM integration and floor plans.

#### MAINTENANCE

Work planning and management. Request, order management, ticketing management, scheduled maintenance and extraordinary interventions detection. Integration of the DEI price list, regional price lists, etc.

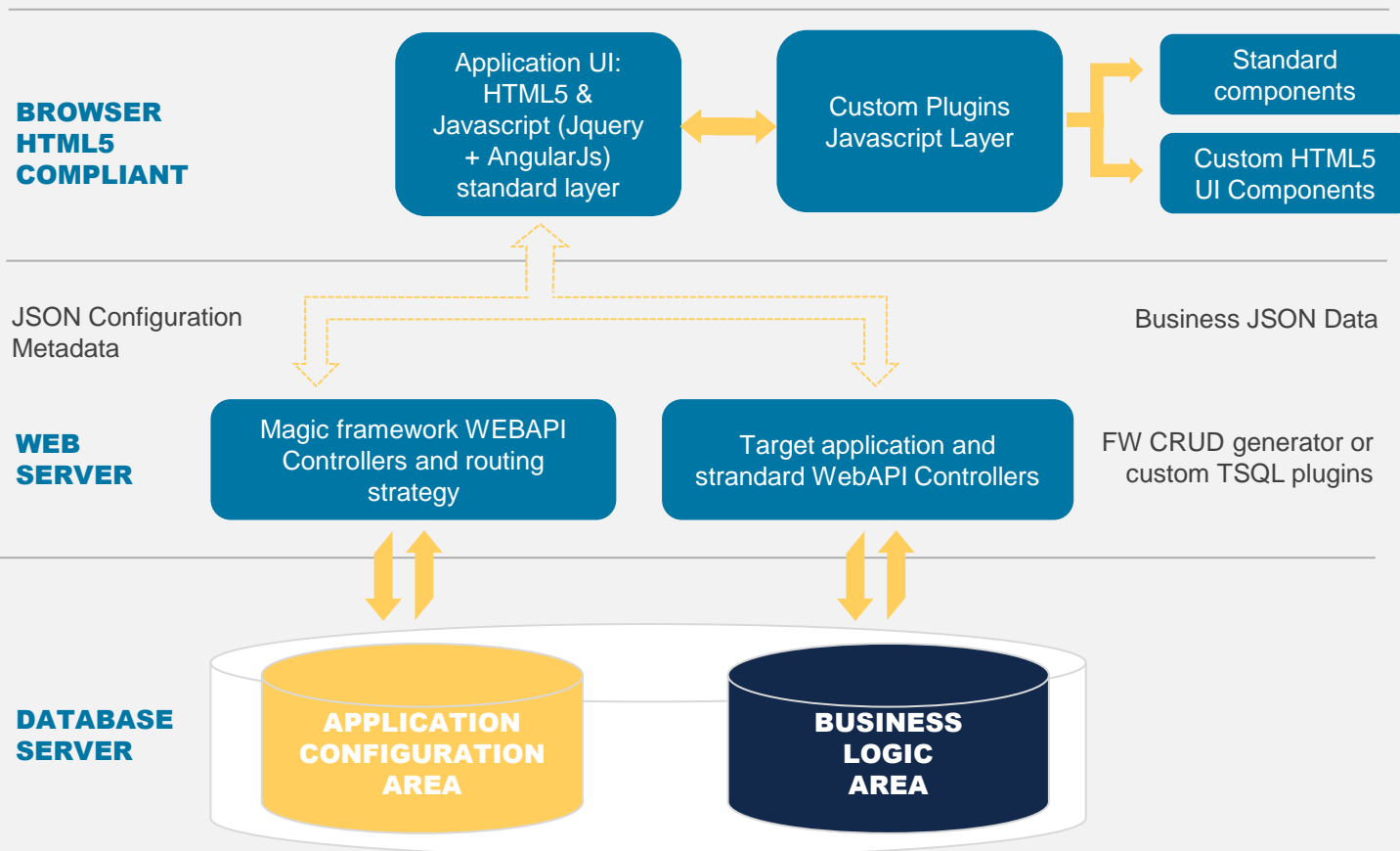
#### ENERGY MANAGEMENT

Standard detection and optimization of energy consumption of electrical systems. Possible immediate savings through energy optimization devices.

#### IOT INTEGRATION

Optimization of maintenance works and consumption in relation to specific data collected directly from the equipment connected to the system. Plant automation (ignition, regulation and shutdown).

# Overview technical architecture



## FRONT-END JAVASCRIPT

Rendering of configuration metadata in HTML5 compliant components. The user interface is made up of the merging of dynamic web pages written in HTML5 and JavaScript. The user interface substitutes the typical GUI of desktop software.



## DATA ACCESS LAYER

A layer that manages the application's functionalities performing detailed elaborations to satisfy the customer's demands.



## DATABASE SERVER

Headquarters of applicative configurations and business data. The integration takes place through the exposition of WebAPI that let both the acquisition that the export of default tracked data in predefined paths in XML / JSON format

# Top client



In Italy, REFTree is highly regarded by a wide array of distinguished clients across various sectors and is prepared for international expansion, ensuring optimal performance and operational efficiency.





# Top client



## Saving funds



## Pension funds



## Retail



## Religious bodies





DISCOVER  
OUR WEBSITE



**RINA PRIME**  
VALUE SERVICES



RINA Prime Value Services



@rinaprime

REV00 del 07.08.2024