



Adding a Contract User Guide

Real Estate Manager

Version 26.1



Document Information

Notices

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Disclaimer

This guide is designed to help you to use the Real Estate Manager applications effectively and efficiently. All data shown in graphics are provided as examples only. The example companies and calculations herein are fictitious. No association with any real company or organization is intended or should be inferred.



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Adding a Contract

Introduction

Real Estate Manager allows you to manage a wide range of contracts associated with an asset, including leases, sub-leases and maintenance or service agreements. Contracts are configured in the Administration workspace and are defined by:

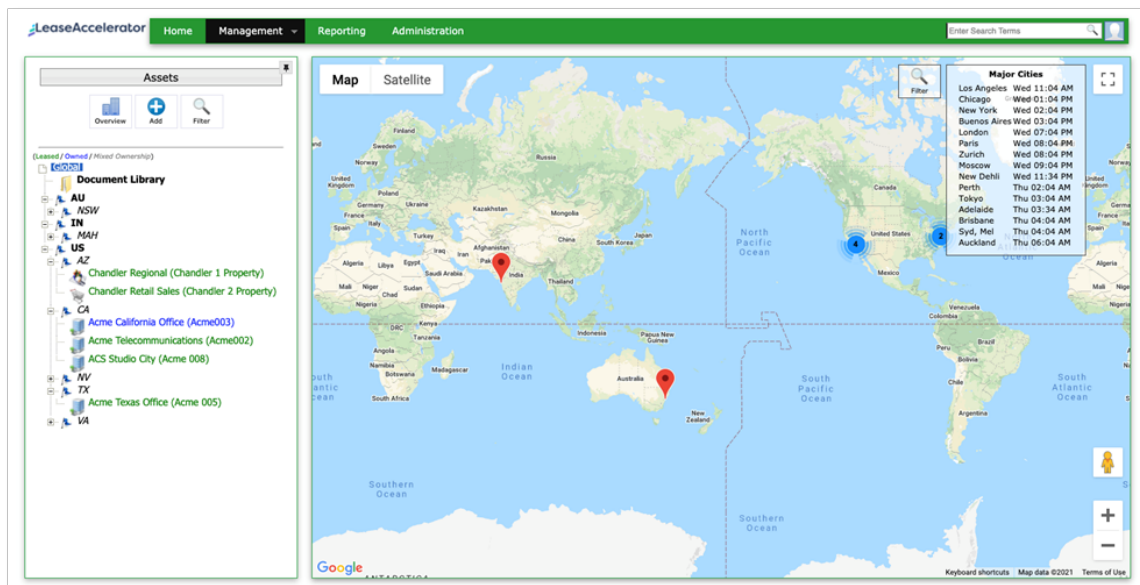
- **Contract Category** – a group of contracts with similar characteristics.
- **Contract Type** – a single contract defined within a Contract Category.

For example, a Lease Contract Category could include office leases, parking leases and subleases. A Service Contract Category might include security contracts and janitorial contracts. All contracts can be defined as payable (where payments are required to be made to a third-party for a right of use asset, or for goods and services) or receivable (where payments are received from third-parties, such as when you are sub-leasing a portion of your leased premises).

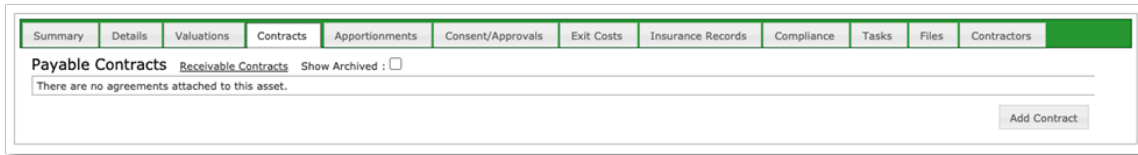
Each Contract Type can have Custom Clause Groups and Data Fields configured in the Administration workspace. This allows you to define the clauses and data fields most relevant to your business.

Adding a Contract within the User Interface

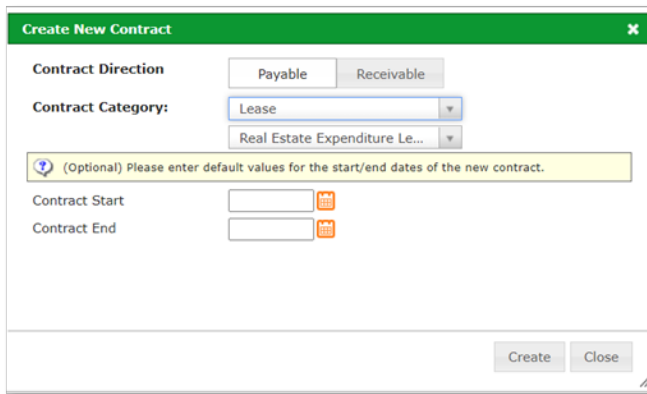
1. From the Top NavBar, select **Management** and then **Assets**.



2. In the Action Panel, click the **Expand Tree** icon to display the Asset you want to add a contract to.
3. Select the Asset. The Summary tab for the Asset displays.
4. Click on the **Contracts** tab.



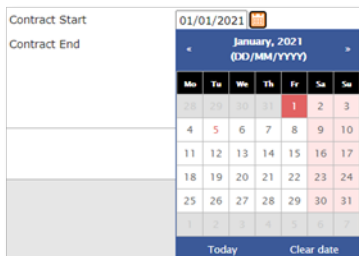
5. Click the appropriate contract direction, either **Payable Contracts** or **Receivable Contracts**.
6. Click **Add Contract**.
7. In the Create New Contract pop-up, verify the correct Contract Directions.



8. From the Contract Category drop-down, select the appropriate Contract Category.
9. From the second drop-down, select the Contract Type.

Note: A Contract Category and Contract Type cannot be added from the Contracts tab within Asset Management. You must configure these through the Administration workspace.

10. Select the **Contract Start** and **Contract End** dates by clicking in the fields or the Calendar icon and selecting the appropriate dates.



Note: If you do not select a Contract End Date, it will default to one year from the Contract Start date.

11. Click **Create**.

Entering Contract Details

1. In the Contract Details section, enter information that describes the contract in the Description field.

The screenshot shows a 'Details' form with the following fields and options:

- Description:** Text input field.
- Schedule Number Δ:** Text input field.
- Status:** Drop-down menu with 'Please select an option'.
- Currency:** Drop-down menu with 'United States Dollar'.
- Net Equivalent Ratio:** Text input field with '0'.
- Current Asset(s):** Table with columns 'Primary Asset Status' and 'Asset'.

Primary Asset Status	Asset	
Primary Asset	Denver, CO	Edit

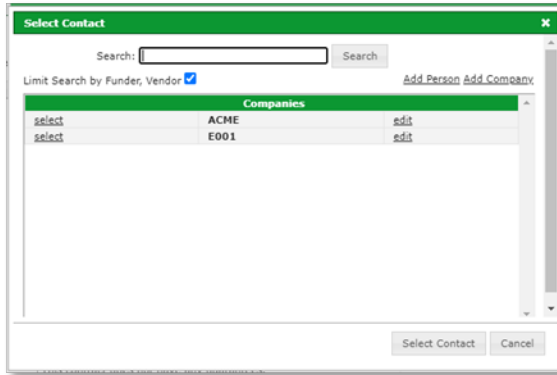
 Below the table is a link: 'Add Asset to Schedule'.
- Lessor:** Text input field with 'Unknown Contact' and search/edit icons.
- Lessee Δ:** Text input field with '- not set -' and search/edit icons.
- Treasury Approver Δ:** Text input field with '- not set -' and search/edit icons.
- Lease Accounting Contract Type:** Drop-down menu with 'Select least type'.
- Is Partial Building:** Radio buttons for 'Yes' and 'No'.
- Notes:** Large text area.
- Guarantees:** Text area with 'This contract does not have any guarantees.' and a link 'Add Guarantee'.
- Files:** Link 'Manage attached files'.

Payable Contract (Informational box):
 Payable contracts represent agreements for goods or services that are sought or for which payment will be made. Contract costs persist through the life of the contract until removed through a cost adjustment. New contract costs may also be introduced through cost adjustments. A review marks a critical date when a set of one or more contract costs will be reviewed. Action a review to update the contract costs as a result of the review process.

2. Enter the unique identifier for the contract in the Schedule Number field.

Note: If you are synchronizing with LeaseAccelerator's Lease Accounting Manager, this is the same Schedule Number that you will see in that part of the user interface.

3. From the Status drop-down, select **Current** to indicate that the contract is active, **Divestment** to indicate the contract is being held for disposition, or **Draft** to indicate that the contract is not completed. To add a new Status, enter the label in the Status field and click the **Add and select?** link.
4. From the Currency drop-down, select the monetary currency to be used for making (or receiving) payments under the contract. This is also known as the transactional currency.
5. To add a Landlord, click the **Search** icon in the Landlord field.
6. To view all Contacts, click to uncheck the **Limit Search by Funder, Vendor** checkbox.

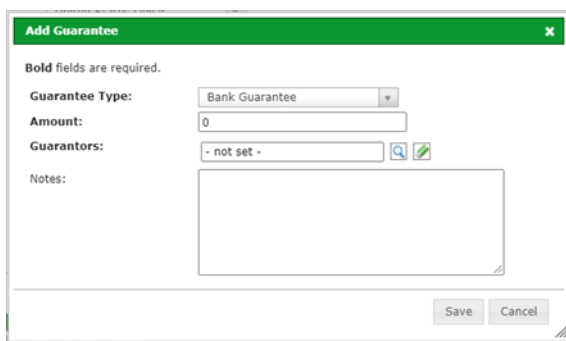


Note: If the Select Contact pop-up does not display the desired Landlord, you can add a Contact.

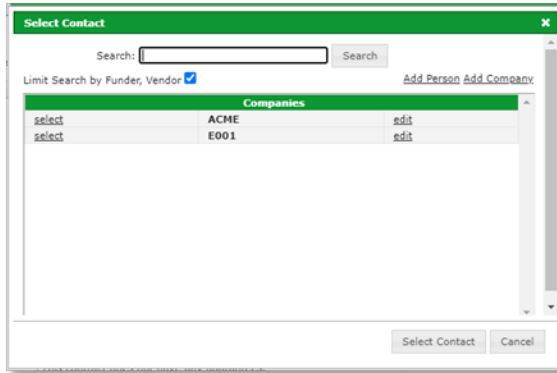
7. Click **select** for the Landlord related to the contract you are adding.
8. Click **Select Contact**.
9. Follow similar steps for the Lessee field, to add a Lessee.
10. Complete other fields as necessary. If you are entering a lease contract, ensure you indicate the Lease Accounting Contract Type.
11. If this is a partial building lease, ensure you indicate.
12. Enter additional information about the contract in the Notes field as needed. This is a free form text field that allows you to quickly capture important details about the contract.

Guarantees

1. From the Guarantee Type drop-down, select the method for funding the Guarantee.



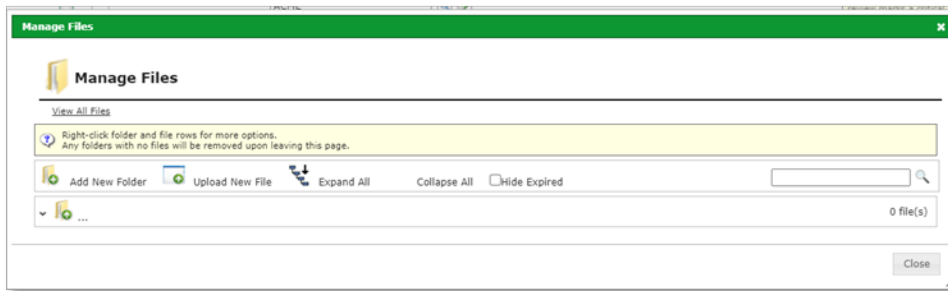
2. In the **Amount** field, enter the monetary value of the Guarantee.
3. To select the Guarantor, click the **magnifying glass** icon.



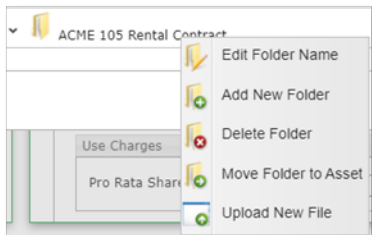
4. To view all Contacts, click the uncheck the **Limit Search by Vendor** check-box.
5. Click **select** for the Guarantors related to the contract you are adding.
6. Click **Select Contract**.
7. Click **Save** to add the Guarantee to the contract.

Adding Files and Notes to a Contract

1. To add files, such as documents or spreadsheets, click **Manage attached files**.



2. Right-click the folder into which you want to upload a file and select **Upload New File**.



3. In the Description field, enter information about the file.
4. Click **Browse** and select the file you want to upload.
5. Click **Open**.

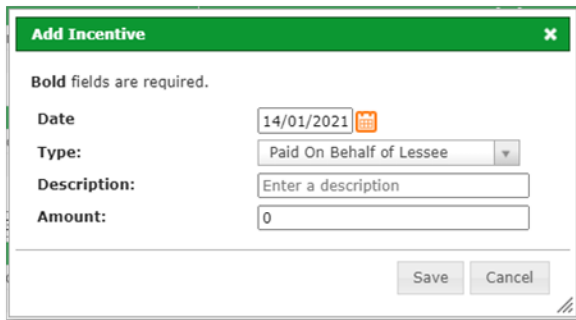
6. To set an expiration date for the file, click the Expiry Date field or the Calendar icon and select the date on which the file expires.
7. In the Notes field, enter any additional information about the file.
8. Click **Save** to upload the file.

Custom Fields

If you added any custom fields when configuring the Contract Type, those fields will appear in sections below the Details section. These may vary, depending on the Contract Type. You may only add custom fields in the Administration workspace and not while in Asset Management. For more information on custom fields, please see .

Lease Incentives

1. To add a Lease Incentive (such as a Tenant Improvement or Moving Allowance), in the Incentives section, click **Add New Incentive**.



2. Click the Date field or the Calendar icon to display the calendar and select the appropriate date.
3. From the Type drop-down, select **Paid on Behalf of Lessee** if the Incentive is paid by a party other than the Lessee, or select **Paid to Lessee** if the Incentive is paid to the Lessee.
4. Click the Description field and enter information to describe the Incentive.
5. In the Amount field, enter the monetary amount of the Incentive.
6. Click **Save** and the Incentive will be added to the contract.

Initial Costs

1. To add Initial Costs, click **Add New Initial Cost** in the Initial Costs section.

2. From the Type drop-down, select **Commission** if the Initial Cost is a brokerage commission, or **Payment to Prior Tenant to Terminate Early** if the Initial Cost is a fee paid to compensate the prior tenant for vacating the premises early.
3. Enter information about the Initial Cost in the Description field.
4. In the Amount field, enter the monetary amount of the Initial Cost.
5. Click **Save** to add the Initial Cost to the contract.

Make Good Costs

1. To add Make Good Costs, first indicate the Date of Obligation by entering the date or clicking the Calendar icon and selecting the appropriate date.
2. Click **Add New Make Good Cost**.
3. From the Type drop-down, select **Cost to Dismantle or Remove (per Agreement)** if the Make Good Cost is to remove any renovations made or **Equipment-Refurbishment** if the Make Good Cost is related to equipment or **Real Estate – Return to Original Condition** if the Make Good Cost is for removing renovations and returning the space to its original condition.

4. Enter information about the Make Good Cost in the Description field.
5. In the Amount field, enter the monetary amount of the Make Good Cost.
6. Click **Save** to add the Make Good Cost to the contract.

Break Termination Penalties

1. To add a Break Termination Penalty, click **Add New Break Termination Penalty** in the Break Termination Penalties section.

2. Enter information about the Break Termination Penalty in the Description field.
3. In the Amount field, enter the monetary amount of the Break Termination Penalty.
4. Click **Save** to add the Break Termination Penalty to the contract.

Contract Initial Term and Options

1. To add the Contract Initial Term and Options, go to the Contract Term and Options section.

Term	Term Range	Option Exercise Dates	Term/Option State	
Initial Term	01/01/2021 - 31/12/2021	n/a	Initial Term	Edit Notes

2. In the Term field, update the default value of the Initial Term as needed.
3. Click the Calendar icon and select the beginning and ending dates for the Term Range.
4. Click **Edit Notes** to add information about the Contract Initial Term and Options.
5. Enter information in the Edit Notes pop-up as necessary and click **Update** when finished.

6. To add a Contract option, click **Add Option** and a new row will appear in the Contract Term and Options section.
7. In the Term field, update the default value of Option 1 as needed.

Contract Term and Options: (sort)

Term	Term Range	Option Exercise Dates	Term/Option State
Initial Term	01/01/2021 - 31/12/2021	n/a	Initial Term
Option 1	01/01/2022 - 31/12/2022		Please select an option

Reviews and Adjustments:

Note: Only the last actioned review and the unactioned reviews following it may be changed. Only reviews after the last actioned review may be actioned. To edit or action previous reviews you must revert all following actioned reviews to unlock the review.

- Click the Calendar icons and select the beginning and ending dates for the Term Range.
- Click the Calendar icons and select the beginning and ending dates for the Option Exercise Dates.
- From the Term/Option State drop-down, select the status of the option as **Pending** if the option has not been invoked, **In Progress** if the option is being invoked, but not yet completed, or **Exercised** if the option has been fully invoked.
- To add information about the option, click **Edit Notes** and you may enter relevant information in the pop-up and click **Update**.

Reviews and Adjustments

- To add Reviews and Adjustments, use the **Click here** link to add the first Commencing Costs.

Reviews and Adjustments:

Note: Only the last actioned review and the unactioned reviews following it may be changed. Only reviews after the last actioned review may be actioned. To edit or action previous reviews you must revert all following actioned reviews to unlock the review.

Date	Type	Details	State	Actions
No commencing costs have been provided for this contract. Click here to specify the commencing costs.				

- To define the Contract Costs for both a Recurring and Ad Hoc Contract and to have recurring invoices, start in the Recurring Invoice section.

Setup Recurring Invoices

Note: Invoices will be generated from the effective date of the review onward starting from the first invoice date.

Costs may be dragged to and from recurring invoices and to the Actioned Costs table by clicking and dragging on the icon. Removing a recurring invoice will transfer any costs with an assigned asset to the Other Actioned Costs table. Multiple costs assigned to the same asset and category must be given a unique description to distinguish each cost. This unique description is used when actioning reviews to ensure the correct change is applied to the correct cost. Tax and Per-Annum amounts are calculated using Payment Amount and Tax Rate for the First Payment Date, if First Payment Date is changed, click the calculate button beside Payment Amount to recalculate the Tax and Per-Annum amounts.

Recurring Invoice

Vendor: Unknown Contact Description: First Invoice: 01/01/2025 Then Every: 1 Months

Invoice Type: Select invoice type Invoice Group: Select group

Label	Asset	Archived	Category	Jurisdiction	Tax Rate	First Payment	Payment	Tax Amount	Total P.A. (Ex Tax)	Paid	Every
No costs have been allocated to this recurring invoice section. Recurring invoices with no allocated costs will not be created.											

Add New Recurring Invoice

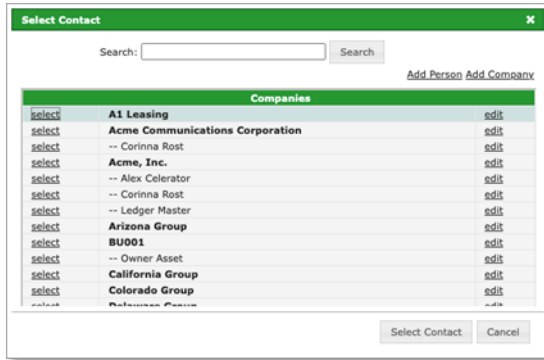
Other Actioned Costs

Any costs shown below will be updated in the contract but will not be attached to recurring invoices

Label	Asset	Archived	Category	Jurisdiction	Tax Rate	First Payment	Payment	Tax Amount	Total P.A. (Ex Tax)	Paid	Every
No costs have been configured for the contract in this section											

Notes:

- In the Vendor field, click the **magnifying glass** to select the correct Vendor.
- Click **Select** next to the correct company.



5. Click **Select Contact**.
6. Next enter an appropriate Description.
7. Select the appropriate Invoice Type from the drop-down.

Note: Invoice Types are defined and configured in the Administration workspace within the Invoice Types tile.

8. Select the appropriate Invoice Group from the drop-down.

Note: Invoice Groups are defined and configured in the Administration workspace within the Invoice Types tile and are used to organize custom fields defined for a particular Invoice Type.

9. Verify the correct First Invoice Date, change as necessary.
10. Verify that the Then Every field and drop-downs are accurate for this cost.
11. Verify that the Then Every field and drop-downs are accurate for this cost.
12. Click the **plus sign** to add a cost line item.
13. In the Label field, enter a title for the Contract Cost you are defining, such as Base Rent.
14. The asset listed is associated with the contract you are entering. Click the Asset drop-down to select another Asset if necessary. If you want to include Archived Assets in the drop-down, check the box to include Archived Assets.
15. Click the Category field to display the drop-down for configured Cost Categories for this Contract Type and select the appropriate category.
16. The Jurisdiction field automatically displays the country and province or state of the Asset's address. To select a different Jurisdiction, you may click in the field and choose from the drop-down.

17. Click the Tax Rate field to display the drop-down and select the country or province that assesses taxes.
18. In the First Payment field, ensure that the date is accurate. It will auto-populate with the Contract Start Date.
19. In the Payment field, enter the amount of the periodic payment and click the **Calculator** icon.
20. The Total per Annum Excluding Tax (Total P.A. (Ex Tax)) field updates with the total payable amount throughout one year from the First Payment Date.

Note: If the Tax Rate is updated, you must click the **Calculator** icon again in the Payment field to ensure accurate tax amount is calculated in the Tax Amount field. Similarly, if the Payment amount is edited, you should click the **Calculator** icon again to ensure the accurate tax amount is calculated in the Tax Amount field.

21. In the Tax Amount field, you can enter a Tax amount or use the pre-filled Tax Amount if applicable. Click the **Calculator** icon to ensure accurate calculation of the total tax amounts.

Note: The pre-filled Tax Amount appears when the user clicks on the **Calculator** icon again in the Payment field.

22. Click the Paid field to display the drop-down and select **In Advance** if the payment is made at the beginning of each period, and **In Arrears** if the payment is made at the end of each period.
23. Click the Every field to display the drop-down and select the schedule for payments.
24. If you have additional Commencing Costs to add, you may click the **plus** sign in the Recurring Invoice sections and repeat steps 13-22.
25. In the Notes field, enter information about the Contract Costs, as needed.
26. Once all Commencing Costs have been entered, click **Okay** to save.

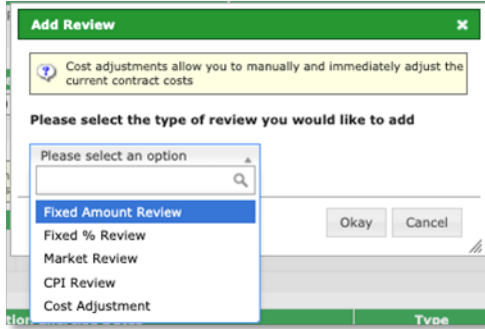
Reviews and Adjustments:

Note: Only the last actioned review and the unactioned reviews following it may be changed. Only reviews after the last actioned review may be actioned. To edit or action previous reviews you must revert all following actioned reviews to unlock the review.

Date	Type	Details	State	Actions
01/04/2019	Commencing	• Base Rent [Rent]: Paid In Advance Monthly on the 1st of the month, \$3,400.00 USD Orange - No Tax (\$40,800.00 USD P.A. ex Tax)	Commencing	Edit Add Review

Adding Reviews or Adjustments

To add Reviews and Adjustments after the Commencing Costs have been entered, click **Add Review** in the Reviews and Adjustments section and see below for steps for each kind of review.



- **Fixed Amount** – Payment based on a fixed payment schedule
- **Fixed %** - Payment based on an interest rate or index basis
- **Market** – Payment based on evaluation of current market
- **CPI** – Payment based on a change in the Consumer Price Index
- **Cost Adjustment** – A payment adjustment not in the original contract

Fixed Amount

1. To add a Fixed Amount Review, select Fixed Amount Review and click Okay.
2. Click the Calendar icon and select the Date of the Review.
3. From the Review State drop-down, select **Pending** if the review is not yet initiated or select **In Progress** if the review is underway.
4. Click the **Add Multiple Reviews?** checkbox if more than one review is planned.

Adding Fixed Review

Date of Review Add Multiple Reviews?

Review State

Recurrence Details

All reviews will be added with the same state and costs, and with a review date calculated from the date of this review and the recurrence pattern.

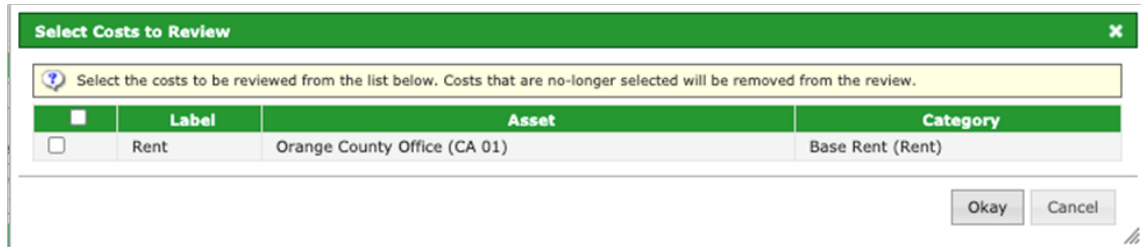
Number of Repeats:

Repeat Every:

5. In the Recurrence Details section, enter the number of reviews to be performed in the Number of Repeats field.

Note: Do not count the payment due on the date you entered as the Review Date. The number of repeats will start with the next payment. Example: 12 months of same payment every month, Number of Repeats = 11.

6. In the Repeat Every field, enter the number of months or years selected from the drop-down to establish the Review Schedule.
7. In the Costs to be Reviewed section, click **Select Costs to Review**.
8. Click the checkboxes for Costs to Review and click **Okay**.



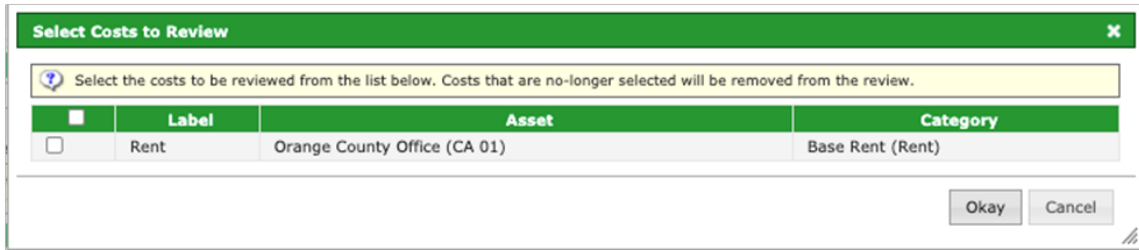
9. In the Notes field, enter information as needed.
10. Click **Okay** and the review will be added to the Reviews and Adjustments section.

Fixed % Review

1. To add a Fixed % Review, select Fixed % Review and click **Okay**.
2. Click the Calendar icon and select the Date of the Review.
3. From the Review State drop-down, select **Pending** if the review is not yet initiated or select **In Progress** if the review is underway.
4. Click the **Add Multiple Reviews?** checkbox if more than one review is planned.
5. In the Recurrence Details section, enter the number of reviews to be performed in the Number of Repeats field.

Note: Do not count the payment due on the date you entered as the Review Date. The number of repeats will start with the next payment. Example: 12 months of same payment every month, Number of Repeats = 11.

6. In the Repeat Every field, enter the number of months or years selected from the drop-down to establish the Review Schedule.
7. In the Costs to be Reviewed section, click **Select Costs to Review**.
8. Click the checkboxes for Costs to Review and click **Okay**.



9. In the Fixed % field, enter the percentage applied to the review.



10. In the Notes field, enter information as needed.

11. Click **Okay** and the review will be added to the Reviews and Adjustments section.

Market Review

1. To add a Market Review, select Market Review and click **Okay**.
2. Click the Calendar icon and select the Date of the Review.
3. From the Review State drop-down, select **Pending** if the review is not yet initiated or select **In Progress** if the review is underway.
4. Click the **Add Multiple Reviews?** checkbox if more than one review is planned.
5. In the Recurrence Details section, enter the number of reviews to be performed in the Number of Repeats field.

Note: Do not count the payment due on the date you entered as the Review Date. The number of repeats will start with the next payment. Example: 12 months of same payment every month, Number of Repeats = 11.

6. In the Repeat Every field, enter the number of months or years selected from the drop-down to establish the Review Schedule.
7. In the Costs to be Reviewed section, click **Select Costs to Review**.
8. Click the checkboxes for Costs to Review and click **Okay**.

9. In the Cap% field, enter the maximum percentage change.

Asset	Category	Cap %	Collar %	Est %	Plus %
Orange County Office (CA 01)	Base Rent (Rent)	0%	0%	0%	0%

10. In the Collar % field, enter the minimum percentage change.

11. In the Est % field, enter an estimated percentage change.

12. In the Plus % field, enter an optional flat plus percentage.

13. In the Notes field, enter information as needed.

14. Click **Okay** and the review will be added to the Reviews and Adjustments section.

CPI Review

1. To add a CPI Review, select CPI Review and click **Okay**.

2. Click the Calendar icon and select the Date of the Review.

3. From the Review State drop-down, select **Pending** if the review is not yet initiated or select **In Progress** if the review is underway.

4. Click the **Add Multiple Reviews?** checkbox if more than one review is planned.

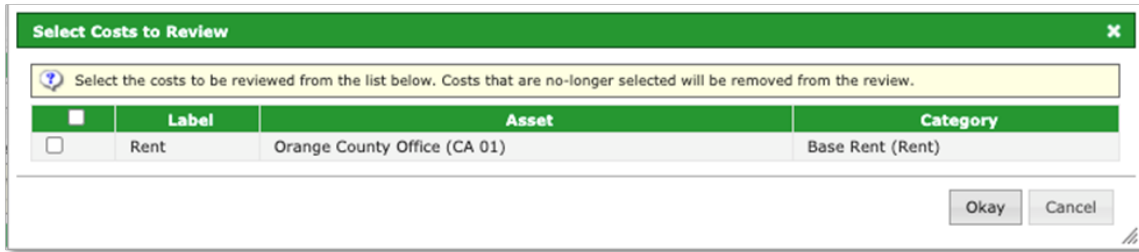
5. In the Recurrence Details section, enter the number of reviews to be performed in the Number of Repeats field.

Note: Do not count the payment due on the date you entered as the Review Date. The number of repeats will start with the next payment. Example: 12 months of same payment every month, Number of Repeats = 11.

6. In the Repeat Every field, enter the number of months or years selected from the drop-down to establish the Review Schedule.

7. In the Costs to be Reviewed section, click **Select Costs to Review**.

8. Click the checkboxes for Costs to Review and click **Okay**.



9. From the CPI Region drop-down, select the Consumer Price Index to be used for the review.

Asset	Category	CPI Region	Cap %	Collar %	Est %	Plus %
Orange County Office (CA 01)	Base Rent (Rent)	US Weighted Average	0%	0%	0%	0%

10. In the Cap% field, enter the maximum percentage change.
11. In the Collar % field, enter the minimum percentage change.
12. In the Est % field, enter an estimated percentage change.
13. In the Plus % field, enter an optional flat plus percentage.
14. In the Notes field, enter information as needed.
15. Click **Okay** and the review will be added to the Reviews and Adjustments section.

Cost Adjustment

1. To add a Cost Adjustment select Cost Adjustment and click **Okay**.
2. Click the Calendar icon and select the date the adjustment is effective, then click **Continue**.
3. If the Cost Adjustment Review is for an Ad Hoc contract, the costs to be adjusted display in the Other Actioned Costs section.
4. If the Cost Adjustment Review is for a Recurring contract, the costs to be adjusted display in the Recurring Invoice section.

5. In the Payment field, enter the Adjusted Cost.
6. Click **Okay** and the Adjusted Cost displays in the Reviews and Adjustments section.

Contract Break Options

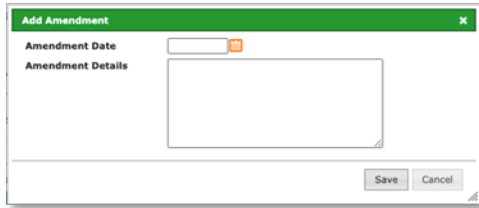
1. To add a Contract Break option, use the Click here link in the Contract Break Options section.
2. In the Add Break Option pop-up, click the Earliest Date and Latest Date Calendar icons and select the dates when the break option can be exercised.

3. From the Break Fee drop-down, select the method used to calculate the cost for exercising the break option.
4. In the Value field, enter the amount of the break fee.
5. Enter any relevant comments.
6. Click **Save** and the Break Option will be added to the Contract.

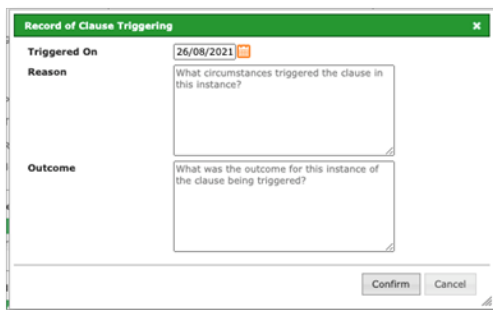
Predefined Ad-hoc Clauses

1. To add a Predefined Ad-hoc clause, click **Add Ad-hoc Contract Clause** in the Predefined Ad-hoc Clause section.
2. In the Contract Clause pop-up, click on the Category drop-down and select **Land** if the clause relates to the site, or **Property** if the clause relates to a building.

3. From the Clause drop-down, select the type of clause you want to add.
4. In the Section field, enter the section of the contract where the clause exists.
5. In the Key Dates section, click the Calendar icon for the Earliest, Latest, and Reminder dates to which the clause applies or can be exercised.
6. In the Documentation section, enter the name of any supporting documentation in the Document field, the page number in the Document Page # field, and the page number for a document in PDF format in the PDF Page # field.
7. In the Structure section, enter the text for the clause in the Clause Text field and other supporting information in the Interpretation field.
8. To add an Amendment, in the Amendment section, click **Add Amendment**.
9. In the Add Amendment pop-up, click the Calendar icon and select the Amendment Date.



10. In the Amendment Details field, enter the text of the amendment or any other relevant comments.
11. Click **Save** and the amendment will display in the clause.
12. To record the exercise of a clause, in the Trigger History section, click **Add Record of Clause Triggering**.
13. In the Triggered On field, click the Calendar icon and select the date the clause was exercised.



14. In the Reason and Outcome fields, record information about the clause trigger.
15. Click **Confirm** and the information displays in the clause.
16. Click **Save** and the contract clause will save and display with the contract.

Saving the Contract

Once all of the contract details have been entered, including the Commencing Costs in the Reviews and Adjustments section, you may save the contract. Scroll down to the bottom of the workspace and click **Save Contract**. Record any notes in the pop-up and click **Okay**.

Once the contract is saved, you will be taken back to the Contracts tab workspace.

Orange County Office (Leased Office Building)

Summary | Details | **Contracts (1)** | Apportionments | Compliance | Tasks | Files

View All Payable Contracts > Orange County Office

Contract Details | Invoices | Lease Accounting History | Contract Audit Log | Subcontracts

Contract Details **Unsynchronised - No Lease Accounting Readiness Reviews**

Description: Orange County Office
 Schedule Number: CA 01
 Status: Current
 Currency: United States Dollar
 Contract Type: Real Estate Expenditure Lease
 Lease Accounting Contract Type: Triple Net Lease
 Is Partial Building: No

Assets:

Asset	Primary Asset Status	Actions
Orange County Office	Primary Asset	View

Lessor: [Moulton Parkway Villas](#)
 Lessee: [Acme Communications Corporation](#)
 Treasury Approver: [Freeman Addison](#)
 Net Equivalent Ratio: 1.0000

Files

Uploaded On	File Name	Description	Expires On	Actions
There are currently no attached files				

Guarantees: This agreement currently does not have any guarantees.

Other Clauses

Category	Name	Section	Current Clause Details	Triggered
No Other Clauses added				

Notes

Actions:

Next Review

Unable to Action next Review
 The next review currently sits outside the current term. Please Exercise the next option to action this review

Fixed on 04/01/2022 - Pending

- Orange County Office - Base Rent

Next Option

Renewal Option 1: 04/01/2022 - 03/31/2025
 Pending
[Mark as In Progress](#) [Mark as Exercised](#)

Adding a Contract Using the REPIW Bulk Import

Real Estate Manager allows for the bulk import of multiple Assets and Contracts using the downloadable REPIW. For more information on populating this import file, please refer to the .

Note: Please note that the REPIW is meant to import Assets with Lease Contracts and may not be used to import Contracts only.

1. Start by downloading the REPIW from the user interface. From the Top NavBar, select **Administration**.
2. Click the Download PIW tile.
3. A preconfigured REPIW will download. Populate all required fields/tabs within the import file. Please refer to the for information on how to populate.
4. Once you have a populated REPIW, go to the **Administration** workspace and select the **Bulk Import** tile.
5. Once in the Bulk Import workspace, start by clicking **Browse** to locate your saved REPIW.
6. Select the appropriate file and click **Open**.
7. Once the file has been uploaded, click **Next**.

8. Step Two in the process is validation and will show all of your validation results from the import process. The Validation table will have 3 columns including Save, Schedule Number, and Status.
9. **Save:** Will either be a warning sign or checkbox depending on status.
10. **Schedule Number:** Represents the Schedule Number by which each of these validation messages are grouped.
11. **Status:** This is where the Validation Message will appear.
12. If no errors or warnings occurred, then status will be Ok. If there were any warnings or errors, they will be listed. If more than one error, you may click **Show error(s)** to see the full list. The user can check and uncheck the boxes in Save column to select which Schedule Number to import.
13. If user clicks **Upload New File** and clicks **Continue** on the pop-up confirmation, then they will be taken back to Step One to select a new file and restart the process.
14. If user has any checked boxes and is ready to proceed with the import, they will click **Import Selected Rows**.
15. The final step will show a table listing all the successful schedules imported. Each Schedule Number will be a hyperlink that may be used to navigate directly to the contract within the asset.

Version Summary

Version	Changes/Updates	Date
21R3	Guide created. Adding a Contract broken out from larger guide. Included adding through UI and Bulk Import.	08/26/2021
23R3	Updated steps to be in Real Estate Manager interface only. Removed all reference to REM.	08/03/2023
24R1.1	Added steps for Tax Amount calculations.	03/01/2024
24R2.2	Updated Review section to add Calculator icon for Tax Amounts.	08/22/2024
24R3.1	Updated screen shots for Recurring Invoice enhancement.	12/03/2024
25.1	Updated steps and screenshots for adding reviews to include Vendor field for recurring invoices.	01/08/2025

