insightsoftware

Contact Register User Guide

Real Estate Manager

Version 26.1

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The Contact Register

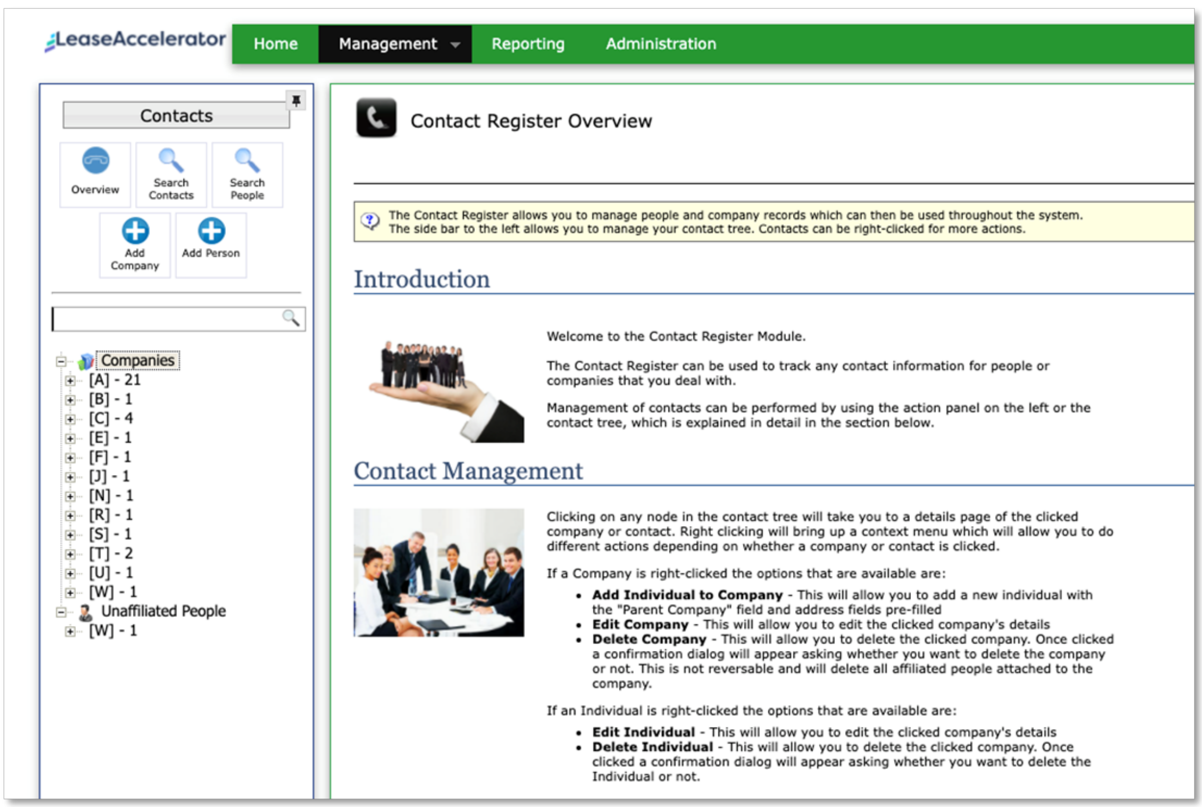
Introduction

The Contact Register maintains information about the companies and people related to the Assets, Contracts, Invoices, and Payments managed. Contacts are either a:

- Company – entity
- Person – individual

The Contact Register is organized by Company and all Contacts must be assigned to Company. The Contact Register allows you to search, add, edit, and delete any Contact. The Contacts listed in the Contact Register are available for selection to be assigned to Assets, Contracts, Invoices, and Payments throughout Real Estate Manager.

The Action Panel allows you to view the Contacts assigned to each Company and provides functions to search and add Contacts.



Adding a Company

The Create Company workspace is used to maintain information about a company.

1. From the Top NavBar, select **Management** and then **Contact Register**.
2. In the Action Panel, click **Add Company**.

3. In the Company Information section, start by entering the **Business Name**. This is the official name of the company.

> **Note:** Any fields in bold are required.

4. Next, if you would like to include a **Short Name**, enter that abbreviated name for the company.

5. Enter the company's **Website, Email, Telephone, Alt. Telephone, Fax, and Mobile**, as necessary.

6. Enter any relevant **Notes**.

7. Click the **Accounting Roles** field to display the options. You may select more than one.
   a. **Area**: Refers to a Reporting Area for internal management reporting. It may be used to group various other organizational divisions together, such as geographic regions or lines of business.
   b. **Entity:** Primary business entity occupying the leased space.
   c. **Funder:** Lessor or Landlord

d. **Geo:** Country that determines the accounting and tax rules that apply to a transaction.

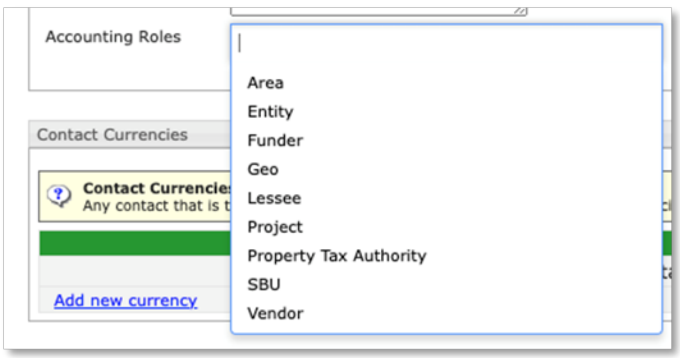
e. **Lessee:** Legal party to the agreement or contract leasing the equipment or renting the real estate.

f. **Project**: Project code the asset is assigned for responsibility/ management reporting.

g. **Property Tax Authority**: The municipality that assesses and collects property or real estate taxes.

h. **SBU**: Strategic Business Unit or BU that is an operational group within an organization primarily used for management reporting.

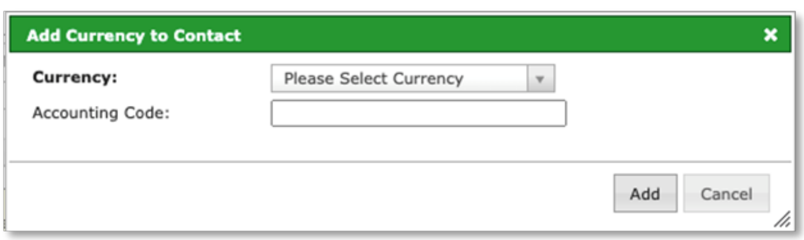
i. **Vendor**: Organization that provides goods or services.



8. To define a currency for the contact, in the Contact Currencies section, click the **Add new currency** link.

> **Note:** Any contact that is to be used as a vendor must have a currency identified for it.

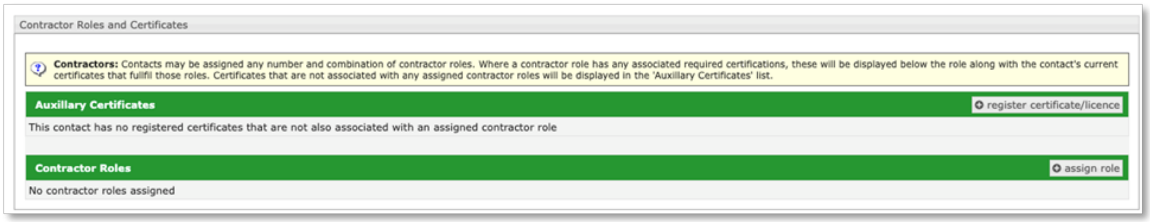
9. In the pop-up, select the **Currency** from the drop-down.



10. If applicable, in the Accounting Code field, enter the identifier for the transactions used by the accounting system.

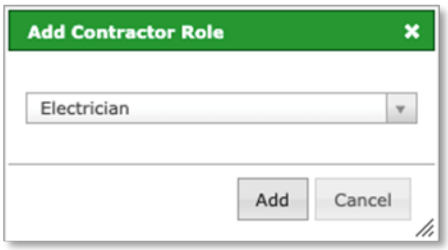
11. Click **Add**.

12. Contacts may be assigned any number and combination of contractor roles. Where a contractor role has any associated required certifications, these will be displayed below the role along with the contact's current certificates that fulfil those roles. Certificates that are not associated with any assigned contractor roles will be displayed in the 'Auxiliary Certificates' list.



13. To assign a Contractor Role, in the Contractor Role section, click **Assign role**.

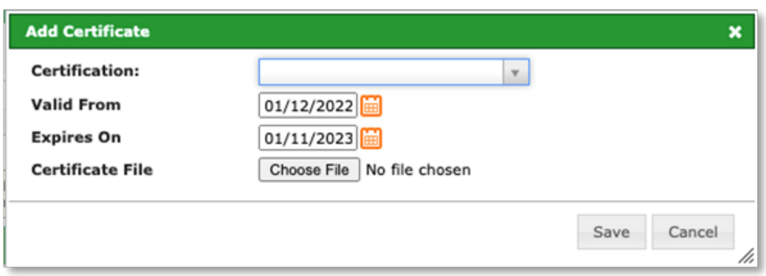
14. In the pop-up, select the Contractor Role from the drop-down.



15. Click **Add**.

16. To assign a Certification in the Auxiliary Certificates section, click **Register certification**.

17. In the pop-up, select the type of certificate from the Certification drop-down.



18. Click the Calendar icons for the Valid From and Expires On fields and select the valid dates for the certificate.

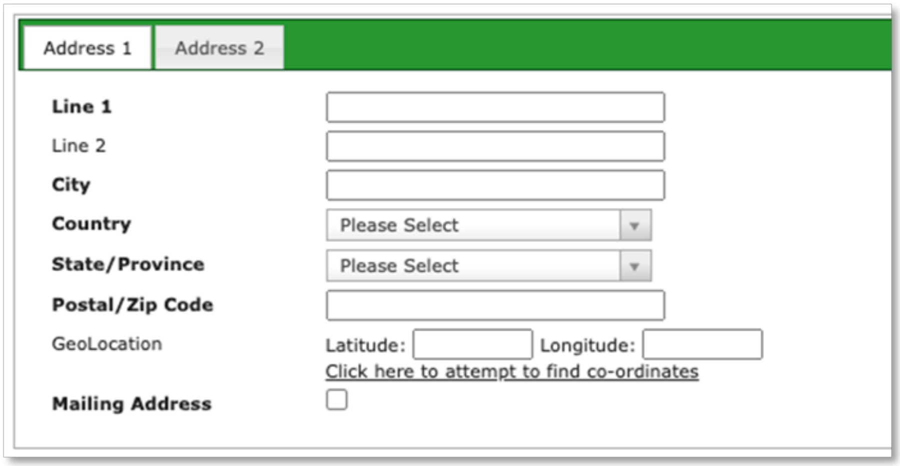
19. Click **Choose File** to upload the certificate document.

20. Navigate to the file and select the file you want to upload and click **Open**.

21. Click **Save**.

22. To record an address for the company, populate the fields in the Address section.

Note: Fields in bold are required.



23. You may add a secondary address by using the Address 2 tab.

24. Once all information is populated, click **Save**.

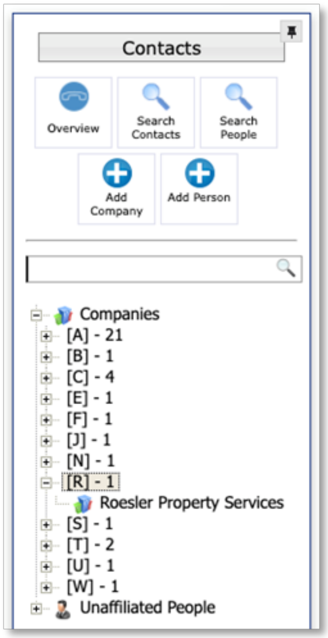
25. The new company is added and displays in the Company Tree in the Action Panel.

Editing a Company

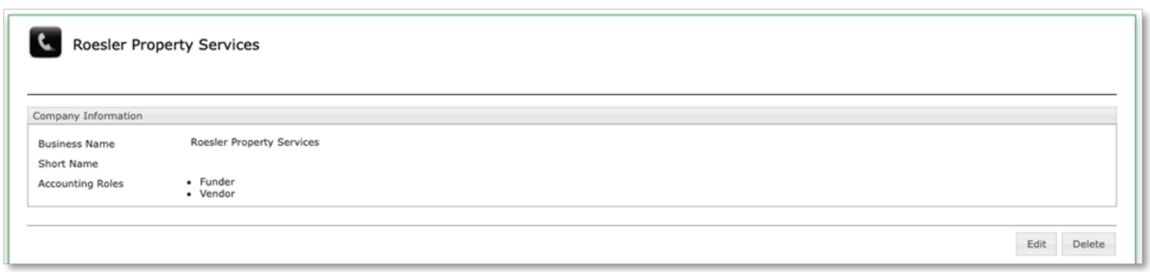
1. From the Top NavBar, select **Management** and then **Contact Register**.

2. In the Action Panel, click the **Expand** icon in the Company Tree to locate the company you wish to edit.

> **Note:** Companies are listed in the Company Tree in alphabetical order according to the Company name.



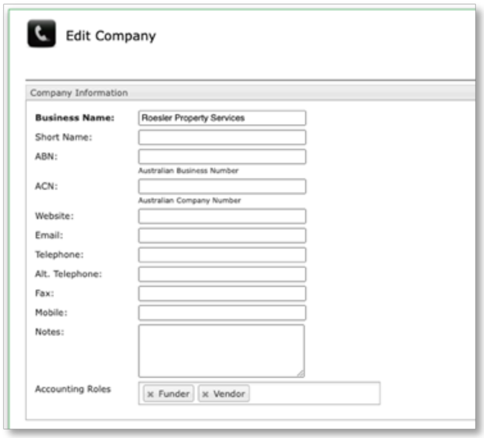
3. Click on the **Company Name**.



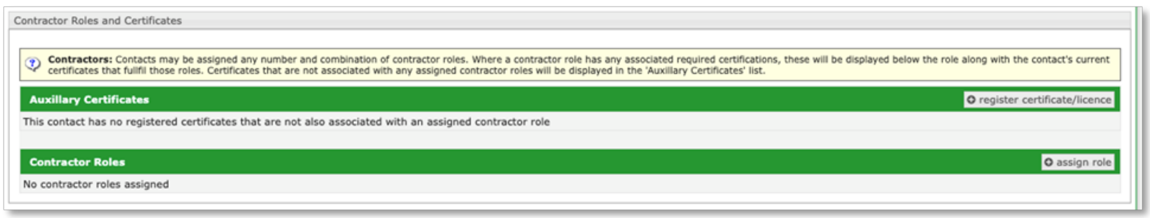
4. Click **Edit**.

5. In the Company Information section, update fields as necessary.

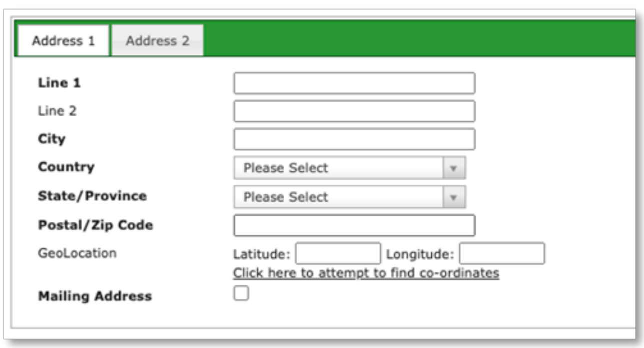
6. You may update Accounting Roles as necessary.



7. You may edit or add Contractor Roles and Auxiliary Certificates as necessary.



8. You may edit the Address section as necessary.



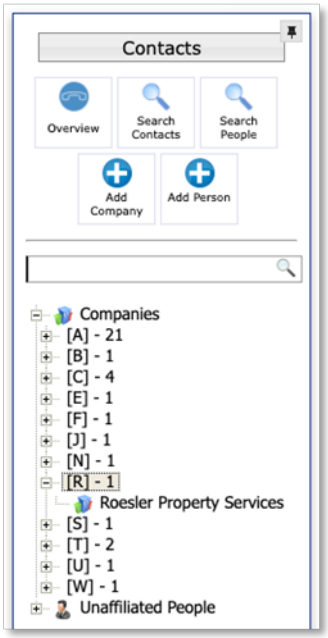
9. Once all updates are complete, click **Save**.

Deleting a Company

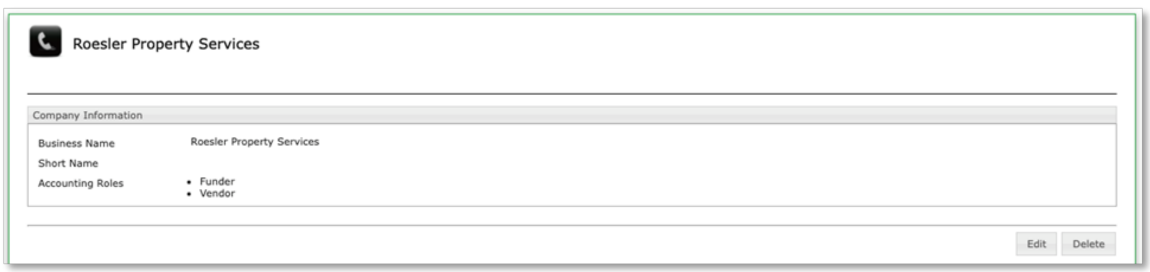
1. From the Top NavBar, select **Management** and then **Contact Register**.

2. In the Action Panel, click the **Expand icon** in the Company Tree to locate the company you wish to delete.

> **Note:** Companies are listed in the Company Tree in alphabetical order according to the Company name.

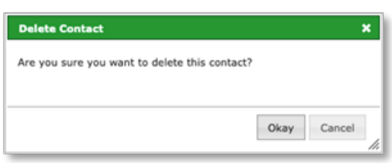


3. Click on the **Company Name**.



4. Click **Delete**.

5. In the confirmation pop-up, click **Okay**.



Adding a Person

You can add an individual (Person) to the Contact Register. However, the Person must be assigned to an existing Company.

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

2. In the Action Panel, click **Add Person**.

3. In the Person Information section, start by selecting a **Title** from the drop-down, if applicable.

> **Note:** Any fields in bold are required.

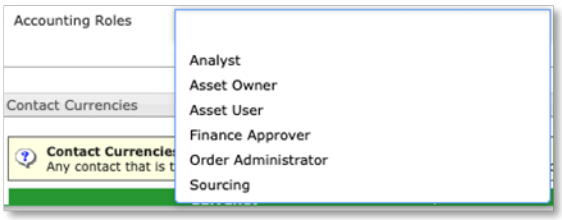
4. Next, populate the **First Name** and **Last Name** fields.
5. You may enter a **Short Name** if desired.
6. Enter any relevant **Description**.
7. From the **Company** drop-down, select the company to which the person will be assigned.
8. Enter a valid **Email** address.
9. Enter **Telephone** and/or **Alt. Telephone**, along with **Fax** and **Mobile**, if relevant.
10. Enter any information about the person in the **Notes** field.
11. Click the **Accounting Roles** field to display options and select.
    a. **Analyst**: Employees responsible for generating the Lease vs. Buy.
    b. **Asset Owner**: Employees who have fiduciary responsibility for the maintenance and use of the assets. These employees are typically management level and are financially responsible for the equipment.

c. **Asset User**: Employees who have custodial responsibility for the leased assets. These employees may be management or staff level.

d. **Finance Approver (Treasury Approver)**: Employees typically responsible for approving the lease transaction and may be the responsible party signing the lease documents. These employees are typically management or executive level and are an escalation step for notifications regarding End-of-Term.

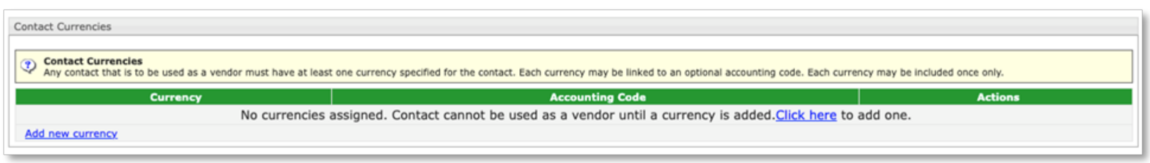
e. **Order Administrator:** Employees who have “procurement” responsibility for the leased assets, shepherding the administrative process in your organization to finance the acquisition of equipment and securing its delivery to the asset user.

f. **Sourcing**: Employees responsible for initiating and creating an RFP, reviewing the Proposals and awarding to a Funder/Lessor.

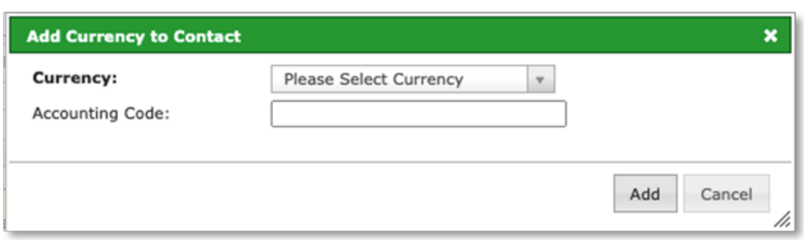


12. To define a currency for the contact, in the Contact Currencies section, click the **Add new currency** link.

> **Note:** Any contact that is to be used as a vendor must have a currency identified for it.

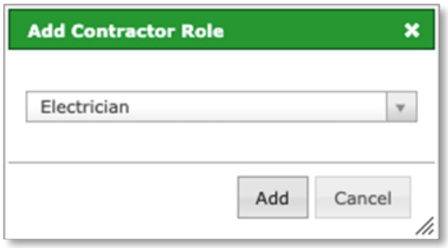


13. In the pop-up, select the **Currency** from the drop-down. Then click **Add**.

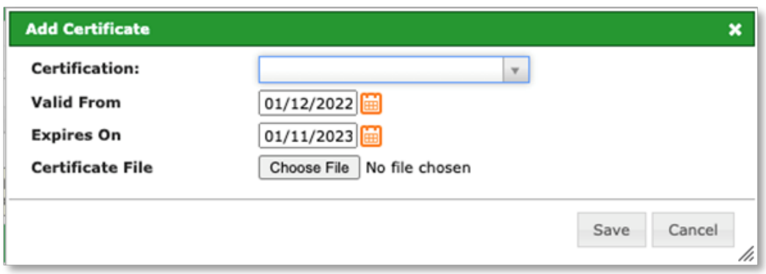


14. To assign a Contractor Role, in the Contractor Role section, click **Assign role**.

15. In the pop-up, select the Contractor Role from the drop-down.

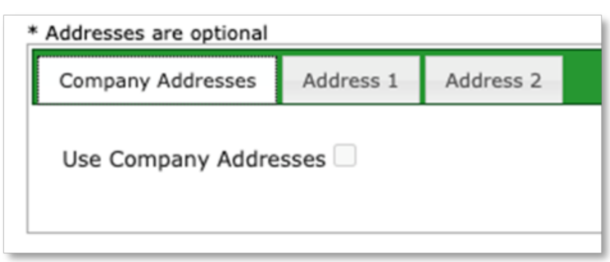


16. Click **Add**.
17. To assign a Certification in the Auxiliary Certificates section, click **Register certification**.
18. In the pop-up, select the type of certificate from the Certification drop-down.



19. Click the Calendar icons for the Valid From and Expires On fields and select the valid dates for the certificate.
20. Click **Choose File** to upload the certificate document.
21. Navigate to the file and select the file you want to upload and click **Open**.
22. Click **Save**.
23. To use the company to which the person is assigned as the address for the person, click the **Company Address** tab and check the **Use Company Addresses** checkbox.

> **Note:** Addresses for people are not required, but if you do populate, then fields in bold are required.



24. You may add a secondary address by using the Address 1 or Address 2 tabs.

25. Once all information is populated, click **Save**.

26. The new person is added and displays under the Company to which the person was assigned in the Company Tree in the Action Panel.

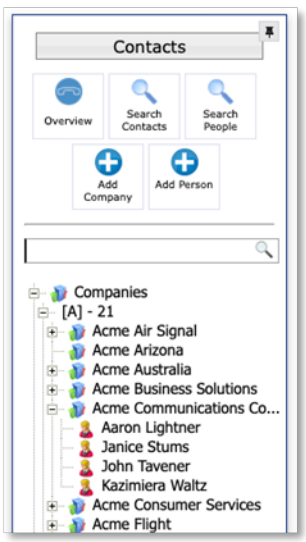
Editing a Person

All information recorded for a Person, including the Company to which they are assigned, can be edited.

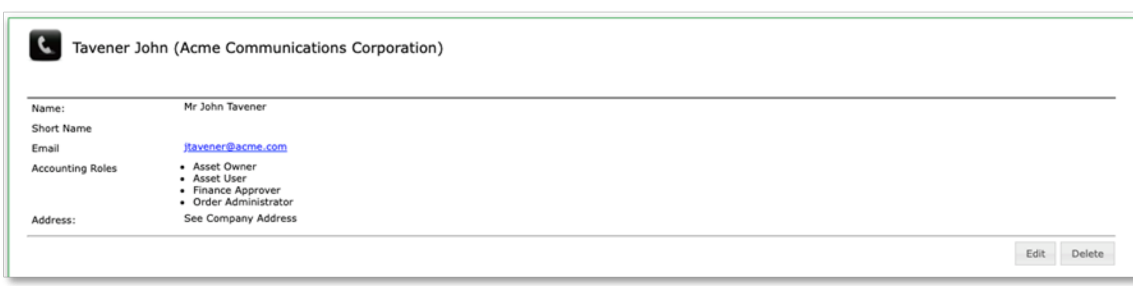
1. From the Top NavBar, select Management and then Contact Register.

2. In the Action Panel, click the **Expand** icon in the Company Tree to locate the company to which the person is assigned you wish to edit.

> **Note:** Companies are listed in the Company Tree in alphabetical order according to the Company name and any assigned people appear nested underneath.



3. Click on the **Person Name**.

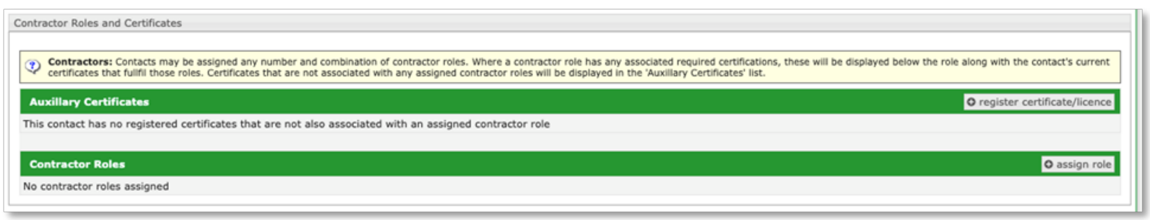


4. Click **Edit**.

5. In the Personal Information section, update fields as necessary.

6. You may update Accounting Roles as necessary.

7. You may edit or add Contractor Roles and Auxiliary Certificates as necessary.



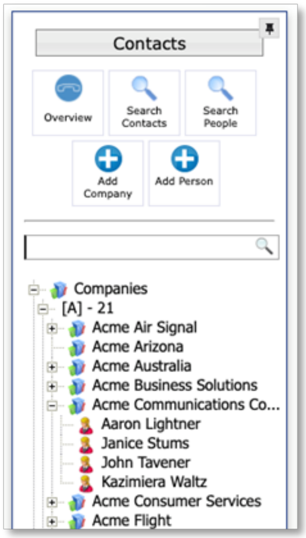
8. Once all updates are complete, click **Save**.

Deleting a Person

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

2. In the Action Panel, click the **Expand** icon in the Company Tree to locate the company to which the person is assigned you wish to delete.

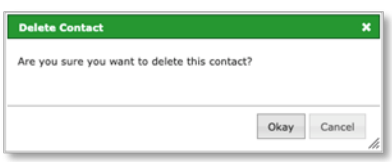
> **Note:** Companies are listed in the Company Tree in alphabetical order according to the Company name and any assigned people appear nested underneath.



3. Click on the **Person Name**.

4. Click **Delete**.

5. In the confirmation pop-up, click **Okay**.



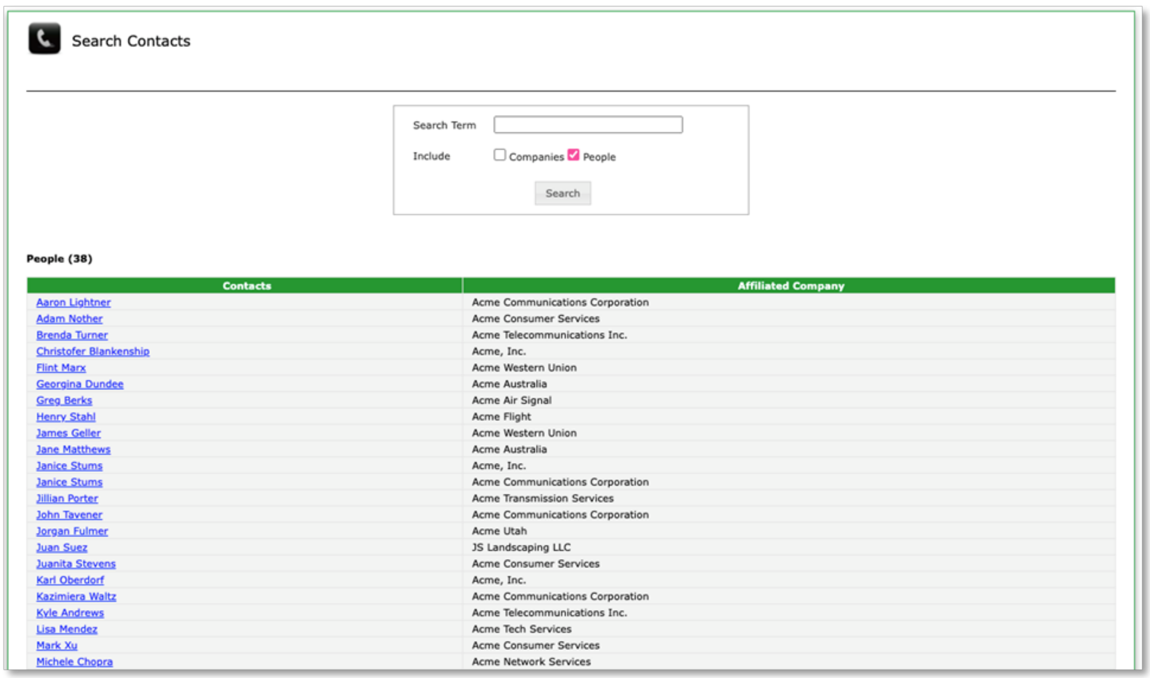
Searching for a Contact or People

Searching for a Contact allows you to select whether the search results are either a Company or a Person.

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

2. In the Action Panel, click **Search Contacts** or **Search People**.

3. In the Search Term field, enter text that you want to use to search.



4. You can search for companies or people by clicking the corresponding checkbox.

> **Note:** If you selected to **Search Contacts**, the Companies box will automatically be checked. If you selected to **Search People**, the People box will automatically be checked.

5. Click **Search**.

6. Click the company or person link to display information about the contact.

Version Summary

Version	Changes/Updates	Date
21R4	Guide created. Contact Register broken out from larger guide.	01/12/2022
23R3	Removed all reference to REM.	08/07/2023