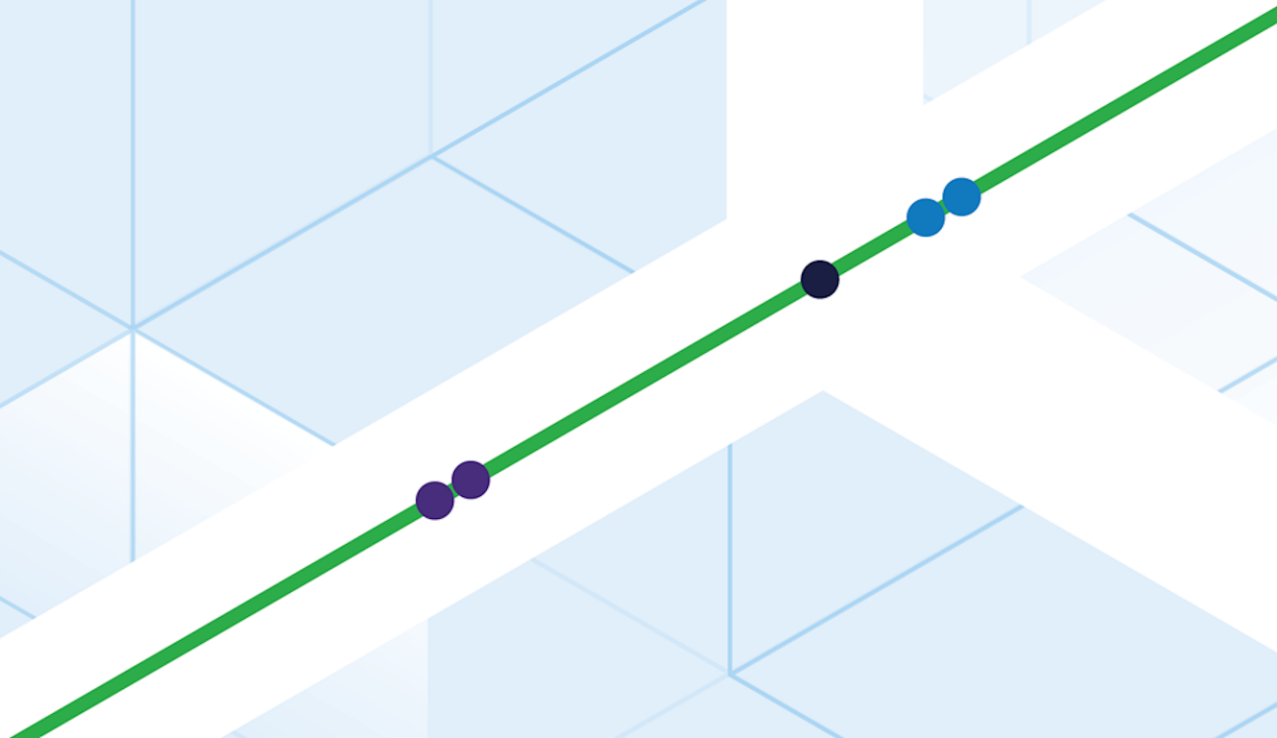




# Bulk Import User Guide

Real Estate Manager

Version 26.2.1



# 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.



# Contents

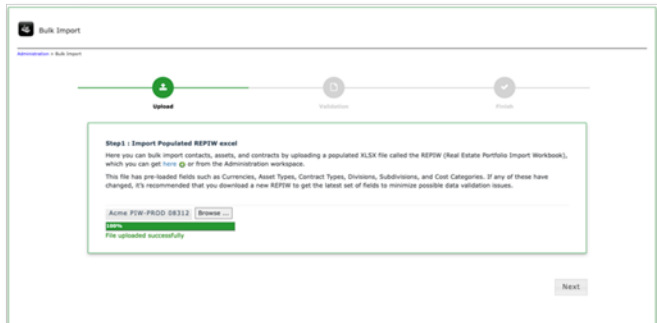
<b>Document Information</b> .....	<b>2</b>
Notices .....	2
<b>Contents</b> .....	<b>3</b>
<b>Bulk Import</b> .....	<b>4</b>
Bulk Import Template .....	5
Use cases: .....	6



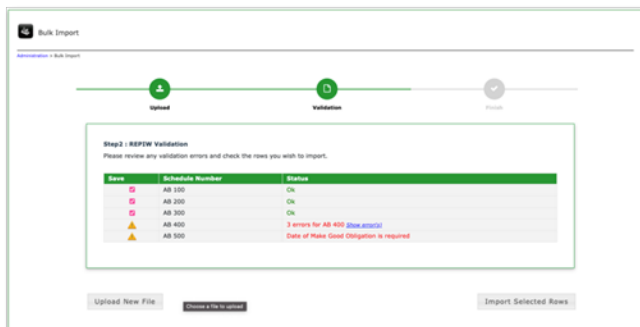
# Bulk Import

Once you have a populated REPIW, navigate to the Administration workspace where you will see a tile for **Bulk Import**. It is in this Bulk Import workspace where you will follow three steps to complete your import of the REPIW.

1. Navigate to the **Administration workspace** from the Top NavBar and select the **Bulk Import** tile.
2. Once in the Bulk Import workspace, the first step will allow you to select a completed REPIW template to be uploaded and validated. Once uploaded successfully, click **Next**.



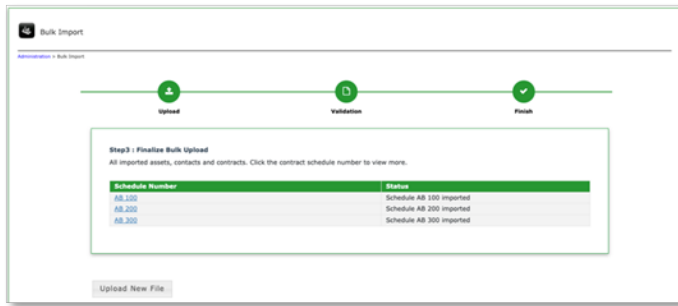
3. The second step will show the validation results from the import process.
4. The Validation table will have 3 columns including Save, Schedule Number, and Status.



5. **Save:** Will either be a warning sign or checkbox depending on status.
6. **Schedule Number:** Represents the Schedule Number by which each of these validation messages are grouped.
7. **Status:** This is where the Validation Message will appear.

Save	Schedule Number	Status
<input checked="" type="checkbox"/>	AB 100	Ok
<input checked="" type="checkbox"/>	AB 200	Ok
<input checked="" type="checkbox"/>	AB 300	Ok
<input type="checkbox"/>	AB 400	3 errors for AB 400 <a href="#">Hide error(s)</a> Deal schedule is missing start date No assets are listed for this schedule Actioned review cost has invalid property reference number AB 400
<input type="checkbox"/>	AB 500	Date of Make Good Obligation is required

8. 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.
9. Check and uncheck the boxes in Save column to select which Schedule Number to import.
10. Click **Import Selected Rows** to proceed with import.
11. 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.



## Bulk Import Template

The Real Estate Manager bulk import template (REPIW) enables users to efficiently import large volumes of asset and contract data into the system. This feature supports complex portfolio structures and reduces manual data entry by allowing users to prepare and upload data through a standardized Excel template.

The bulk import feature provides:

- **Flexible asset imports** - Import asset-level details independently for all ownership types (owned, mixed, payable).
- **Multiple contract support** - Link multiple contracts to a single asset, including both Lease Accounting Significant and Non-Lease Accounting Significant contracts.
- **Hierarchical structures** - Create parent-child asset relationships during import for all ownership types.

## Template Structure

### Contract Reference Number

The Contract Reference Number field in the asset details tab is optional.

- Users can import assets without linking to contracts.
- Column appears in white in the REPIW template to indicate the field is optional.

## Parent Reference Number

The "Parent Reference No" column enables users to define hierarchical relationships between assets.

### Use cases:

- Creating parent-child relationships between assets. Example: A building (parent) can have floors or units (children).
- Establishing property-to-unit structures.
- Creating hierarchical asset structures during import.

## Multiple Contracts per Asset

Users can associate multiple contracts with a single asset to support scenarios such as:

- Properties with multiple tenants.
- Assets with different contract types (e.g., lease and service agreements).

**Note:** Only one contract per asset can be designated as Lease Accounting Significant due to system validation rules.

## How to Use the Template

### Importing Assets with Parent-Child Relationships

1. Add the parent asset first in the template.
2. For each child asset, enter the parent asset's reference number in the **Parent Reference No** field.
3. Complete remaining asset details as required.

### Importing Owned Assets Without Contracts

1. Complete the asset details in the **asset** tab.
2. Leave the **Contract Reference Number** field blank.

**Note:** **Contract** and **Review information** tabs can be omitted.

### Linking Multiple Contracts to an Asset

1. Create multiple rows for the same asset with different contract details.
2. Ensure only one contract is marked as Lease Accounting Significant.

**Note:** Real Estate Manager does not allow multiple lease accounting significant contracts for a single asset.

3. Verify contract details are complete for each contract row.

For Parent Child Relationship and Asset only imports

Contract Reference Number	Parent Reference No	Property Reference Number
REPIW-TEST-1		REPIW-TEST-1
REPIW-TEST-2		REPIW-TEST-2
REPIW-TEST-3		REPIW-TEST-3
REPIW-TEST-4		REPIW-TEST-4
REPIW-TEST-5		REPIW-TEST-5
		Asset Only-1
		Asset Only-2
REPIW-TEST-1.1	REPIW-TEST-1	REPIW-TEST-1.1
REPIW-TEST-2.1	REPIW-TEST-1	REPIW-TEST-2.1

For Multiple Contracts linked to a single asset

Contract Reference Number	Contract Direction	Contract Category	Contract SubCategory
REPIW-TEST-1	Payable	Lease	Real Estate Lease
REPIW-TEST-2	Payable	Lease	Real Estate Lease
REPIW-TEST-3	Payable	Lease	Real Estate Lease
REPIW-TEST-3.1	Payable	Non-Lease	Expenditure
REPIW-TEST-3.2	Payable	Non-Lease	Expenditure
REPIW-TEST-3.3	Payable	Non-Lease	Expenditure

Contract Reference Number	Parent Reference No	Property Reference Number
REPIW-TEST-1		REPIW-TEST-1
REPIW-TEST-2		REPIW-TEST-2
REPIW-TEST-3		REPIW-TEST-3
REPIW-TEST-3.1		REPIW-TEST-3
REPIW-TEST-3.2		REPIW-TEST-3

## Key Benefits

- **Reduced manual effort** - Import complete asset hierarchies in a single operation.
- **Improved data accuracy** - Support for real-world portfolio structures minimizes data entry errors.
- **Greater flexibility** - Accommodate various asset and contract configurations during import.