



Contracting User Guide

Real Estate Manager

Version 26.2.1



Document Information

Notices

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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

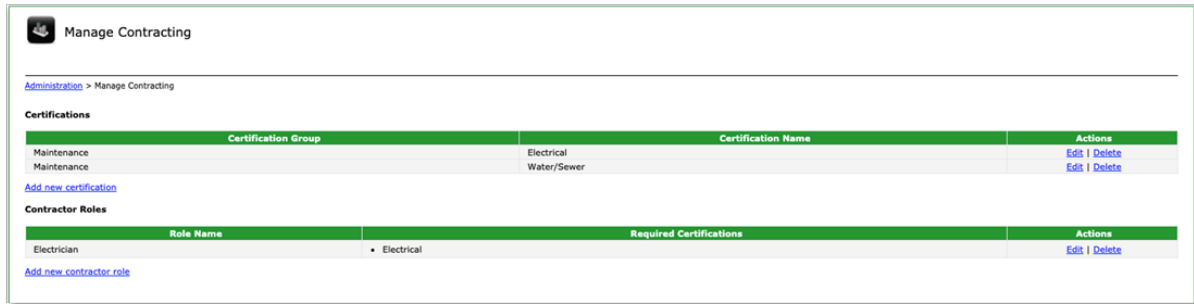
Document Information	2
Notices	2
Contents	3
Contracting	4
Adding a Certification Group	4
Adding a Certification	5
Editing a Certification	5
Deleting a Certification	5
Adding a Contractor Role and Assign a Certification	6
Editing a Contractor Role	7
Deleting a Contractor Role	7
Version Summary	9



Contracting

The Contracting function allows you to create and maintain information about Certifications and Contractor Roles using the Contracting workspace. Real Estate Manager also allows you to link Certifications required for specific Contractor Roles.

learn more about [Master Data and the Administration Workspace](#).



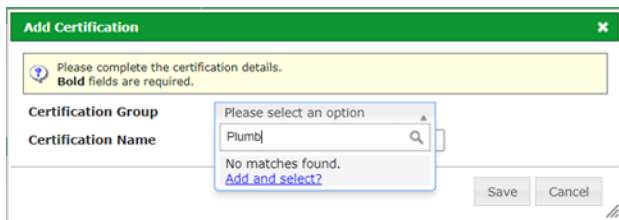
Adding a Certification Group

Certifications are maintained in Certification Groups and multiple Certifications can be added to each Certification Group. A Certification must be assigned to a Certification Group.

1. From the Top NavBar, select **Administration**. The Administration workspace opens.
2. Click the **Contracting** tile and the workspace opens.



3. To add a Certification Group, click the **Add New Certification** link.
4. Enter a name in the Certification Group field. If the Certification Group doesn't exist, you may click **Add and select?** to create the new group.



5. Click **Save**. The Certification Group displays on the Contracting workspace.

Adding a Certification

1. From the Top NavBar, select **Administration**.
2. Click the **Contracting** tile and the workspace opens.
3. Click the **Add New Certification** link.
4. From the Certification Group drop-down, select the Certification Group to which you want to Assign the Certification.

5. Enter a name in the Certification Name field.
6. Click **Save**. The Certification displays with the appropriate Certification Group.

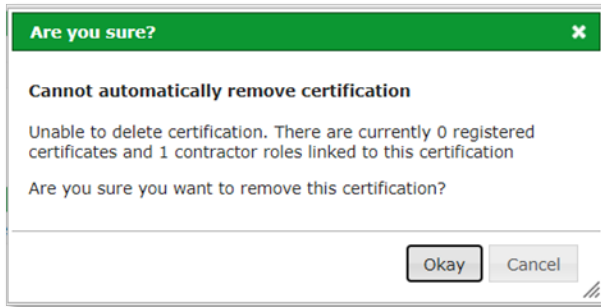
Editing a Certification

1. From the Top NavBar, select **Administration**.
2. Click the **Contracting** tile and the workspace opens.
3. Click the **Edit link** for the Certification you want to edit.
4. In the Edit Certification pop-up, update information as necessary.
5. Click **Save**.

Deleting a Certification

1. From the Top NavBar, select **Administration**.
2. Click the **Contracting** tile and the workspace opens.
3. Click the **Delete** link for the Certification you want to delete.
4. If the Certification is not registered with a Contract or assigned to a Contractor Role, the Certification is removed.
5. If the Certification is registered with a Contract or assigned to a Contractor Role, a pop-up will appear asking if you are sure you want to delete. Within the pop-up, you will be informed of how

many registered certificates and contractor roles are linked to the certification.



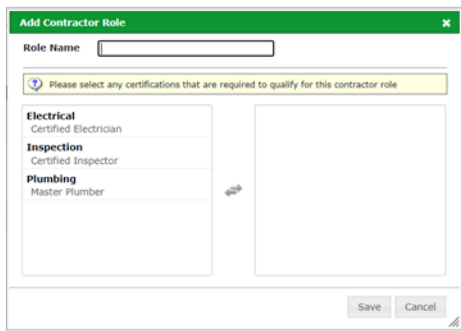
6. If you still want to remove the certification, click **Okay**.

Adding a Contractor Role and Assign a Certification

A Contractor Role is used to group related Certifications.

1. From the Top NavBar, select **Administration**.
2. Click the **Contracting** tile and the workspace opens.
3. To add a Contractor Role, click the **Add new contractor role** link.
4. Enter a label for the Contractor Role in the **Role Name** field.

Note: Certifications that have been defined are listed on the left of the Add Contractor Role pop-up. Certifications that have been assigned to the Contractor Role are listed on the right of the Add Contractor Role pop-up.

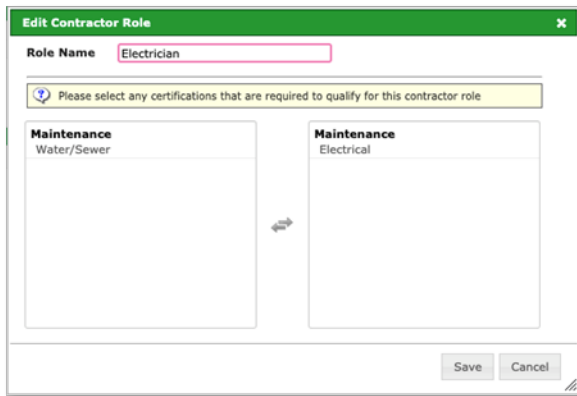


5. To assign a Certification to the Contractor Role, click the appropriate Certification on the left side. The selected Certification will display on the right side.
6. Click **Save** and the new Contractor Role along with the required certifications will display.

Editing a Contractor Role

After you add a Contractor Role and assign Certifications, you can add more Certifications or remove Certifications and change the Contractor Role name.

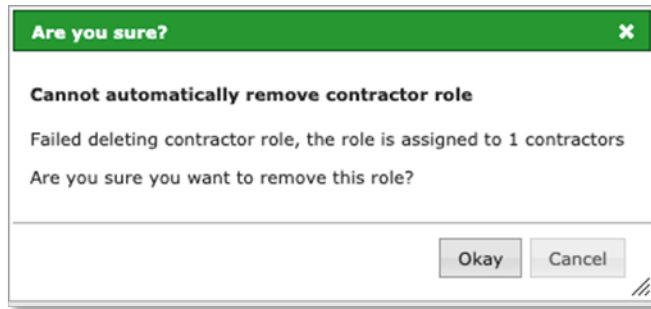
1. From the Top NavBar, select **Administration**.
2. Click the **Contracting** tile and the workspace opens.
3. To edit a Contractor Role, click the **Edit** link.
4. Edit the Role Name as necessary or add additional Certifications.



5. Click **Save** and the Contractor Role will be updated.

Deleting a Contractor Role

1. From the Top NavBar, select **Administration**.
2. Click the **Contracting** tile and the workspace opens.
3. To delete a Contractor Role, click the **Delete** link.
4. If the Contractor Role is assigned to a Contact, you will receive a pop-up asking if you are sure you want to delete. The pop-up will indicate how many contractors are assigned this particular Contractor Role. If you proceed to delete, those Contractors will no longer have a valid Contractor Role assigned to them.



5. Click **Okay** to delete the Contractor Role or Cancel to abort.



Version Summary

Version	Changes/Updates	Date
21R2.1	Guide created. Contracting broken out from larger guide.	07/29/2021

