



Asset Management 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.

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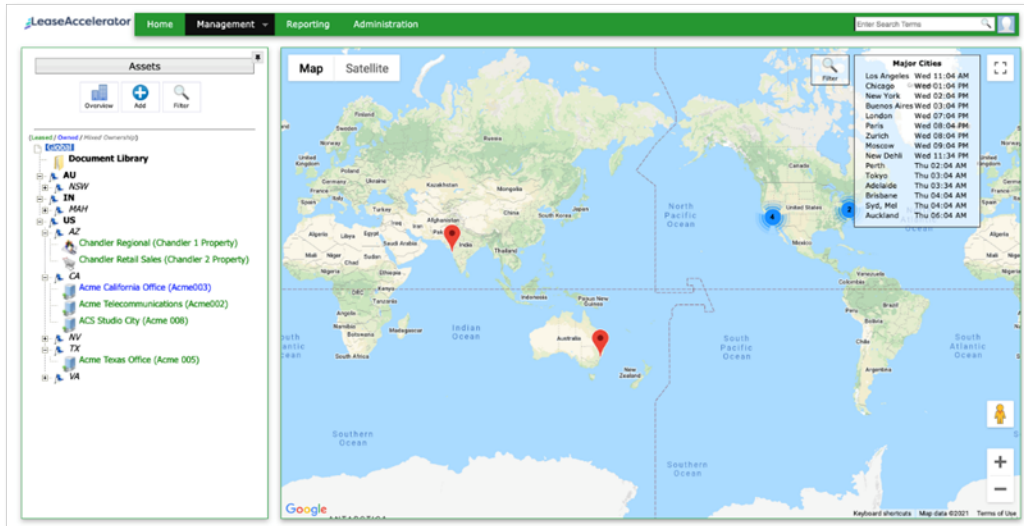


Maintaining Assets in the Asset Management Workspace

Once Assets have been added, either through the user interface or with a bulk import, they can be managed through the Asset Management workspace. Here you can edit, archive, unarchive, delete, and move assets. You may also add child assets to existing assets.

Editing an Asset

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 edit.
3. Select the Asset and the Summary tab for the Asset will open.
4. Go to the **Details** tab and click **Edit Information**.

Orange County Office (Leased Office Building)

Summary Details Contracts (1) Appointments Compliance Tasks Files

Description

 Orange County Office • Operational

CA 01

Leased
Business Unit: Acme Business Solutions
Entity: Acme Communications Corporation
Tax Jurisdiction: US - California (US-CA)

23422 Via San Pablo
Aliso Viejo
California, 92656
US
Manage Area Breakdown

Asset State

Actions:

Property Details

Zoning : - not set -
 Floors in Building : - not set -
 Floors Occupied : - not set -
 Year Built : - not set -
 FTE Capacity : - not set -
 Primary use : - not set -
 Occupied (Y/N) : No
 Multi-Tenant (Y/N) : No
 Building Area : - not set -
 Unoccupied Area : - not set -
 Rentable Area (Gross) : - not set -
 Usable Area (Net) : - not set -

Notes

Notes:

- To change the Ownership Type, click the **edit** link.

Leased Office Building:

[edit](#)

- From the Type drop-down, select the Asset Type. The Asset will inherit the configuration for the Asset Type selected, including the Custom Fields, Folder Structure, Compliance Items, and the tabs displayed.

Change Type Info

Type

Asset Ownership

- From the Asset Ownership drop-down, select the type of ownership.
- Click **Save** and the Ownership Type is updated.
- In the Details section, you may edit any of the available fields.

Details

Leased Office Building: [edit](#)

Reference No.

Business Unit [search](#) [add](#)

Entity [search](#) [add](#)

Tax Jurisdiction

Status:

Photo

[Upload New File](#)

Notes:

10. To select a different Business Unit or Entity, click the **Search** icon.
11. You can start to type the name of the Business Unit or Entity in the Search field to narrow your list of choices, or you can click select next to the name of the Business Unit or Entity in the list.
12. You may also add a Company or Person as the Contact for the Business Unit or Entity.

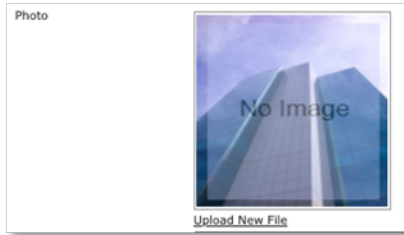
Select Contact

Search:

Limit Search by SBU ☒ [Add Person](#) [Add Company](#)

Companies		
select	Acme Arizona	edit
select	Acme Business Solutions	edit
select	Acme Headquarters	edit
select	Acme Texas	edit
select	BU001	edit

13. To upload a different photo of the Asset, click the **Upload New File** link.

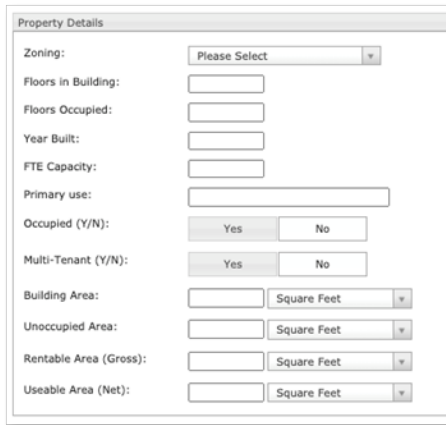


14. In the Description field, enter information about the photo.

15. Click **Browse** and select the file you want to upload, then click **Open**.
16. 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.
17. In the Notes field, enter any additional information about the photo.
18. Click **Save**. The image will display on the new Asset.
19. Custom Fields defined for the Asset Type selected will be displayed under the Details section. Edit as necessary.



Note: Custom Fields may be defined to be optional or required. Custom Fields may be defined with default values that can be updated.



Property Details

Zoning:

Floors in Building:

Floors Occupied:

Year Built:

FTE Capacity:

Primary use:

Occupied (Y/N):

Multi-Tenant (Y/N):

Building Area:

Unoccupied Area:

Rentable Area (Gross):

Useable Area (Net):

20. In the Address section, you may edit as necessary.



Address

Line 1:

Line 2:

City:

Country:

State/Province:

Postal/Zip Code:

GeoLocation: Latitude: Longitude:

[Click here to attempt to find co-ordinates](#)

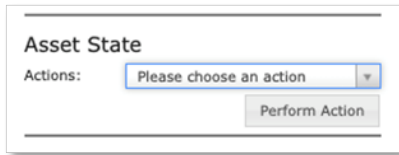
21. Click **Save**. The Asset displays on the Asset Tree and the Asset Details tab displays for the Asset, with the updated information.

Archiving an Asset

When an Asset is no longer in active use, you can archive it to remove from search results. An Archived Asset does remain on the Asset Tree. You may also unarchive an Asset as needed.

Note: You cannot archive an asset that has an active contract attached to it. You must first archive the contract and then archive the asset.

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 archive.
3. Select the Asset and the Summary tab for the Asset will open.
4. Go to the **Details** tab.
5. In the Asset State section, select **Archive asset** from the Action drop-down.

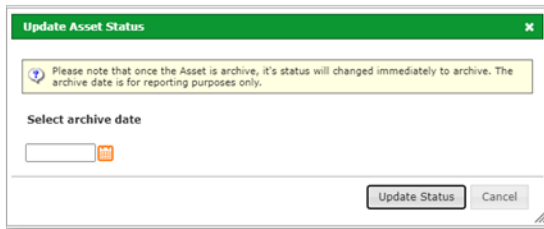


Asset State

Actions: Please choose an action

Perform Action

6. Click **Perform Action**.
7. In the Update Asset Status pop-up, select the archive date.



Update Asset Status

Please note that once the Asset is archive, it's status will changed immediately to archive. The archive date is for reporting purposes only.

Select archive date

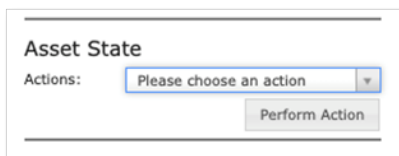
Update Status Cancel

8. Click **Update Status**.

Unarchiving an Asset

Archived Assets may be accessed from the Asset Tree where you can unarchive them as needed.

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 unarchive.
3. Select the Asset and the Summary tab for the Asset will open.
4. Go to the **Details** tab.
5. In the Asset State section, select **Un-Archive asset** from the Action drop-down.



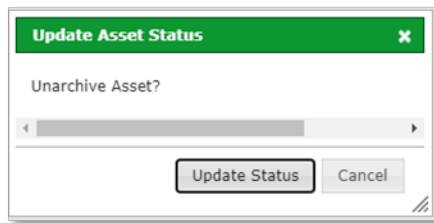
Asset State

Actions: Please choose an action

Perform Action

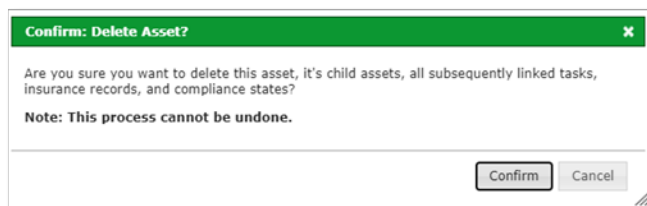
6. Click **Perform Action**.

7. In the Update Asset Status pop-up, click **Update Status** to confirm.



Deleting an Asset

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 delete.
3. Select the Asset and the Summary tab for the Asset will open.
4. Go to the **Details** tab.
5. Scroll to bottom and click **Delete Asset**.
6. Click **Confirm** in the pop-up.

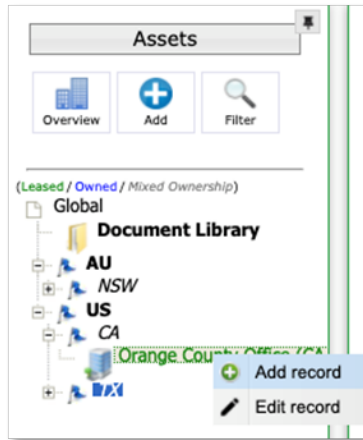


7. The Asset is completely deleted now and will not show up in the Asset Tree or be searchable.

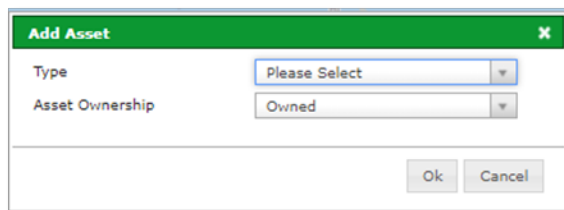
Adding a Child Asset

Real Estate Manager allows for the creation of a parent/child asset relationship. This may be useful if you have one parcel of land, but multiple buildings located at the site. You may enter a parent Asset to indicate the larger parcel of land or complex and individual child Assets to indicate each building on the land or in the complex.

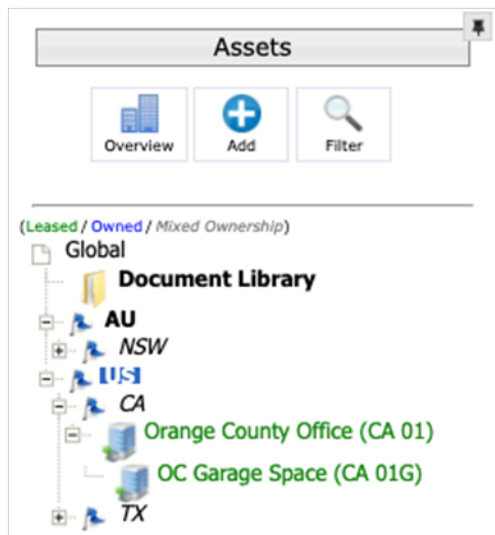
1. From the Top NavBar, select **Management** and then **Assets**.
2. In the Action Panel, click the **Expand Tree** icon to display the Asset you want to add a child Asset.
3. Right-click the Asset and select **Add record**.



4. In the **Add Asset** pop-up, select the Type and Asset Ownership for the child Asset.



5. Click **Ok**.
6. Complete the information needed to define the Asset and click **Save**. The child Asset displays under the parent Asset in the Asset Tree.
7. Please refer to [Adding an Asset](#) for more details.

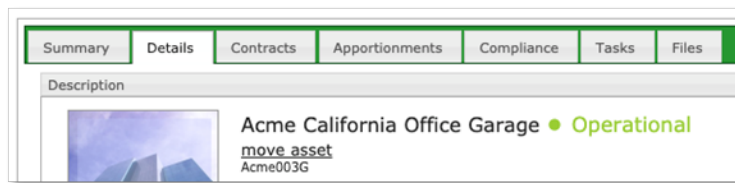


Moving an Asset

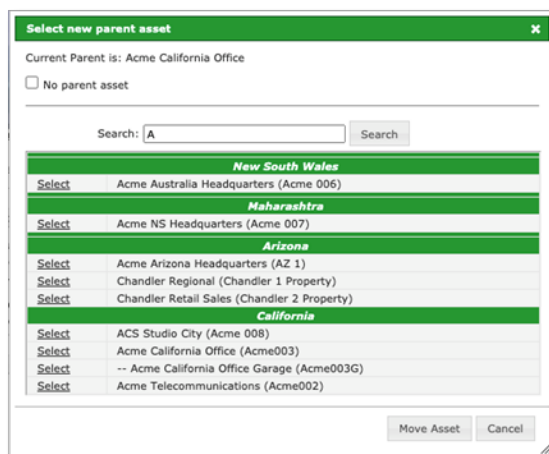
Real Estate Manager allows you to move an Asset to another Asset. However, the moved Asset will become a child Asset to the Asset to which it was moved.

Note: This action is only available for Owned and Mixed Ownership Assets.

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 move.
3. Select the Asset. The Summary tab for the Asset displays.



4. Go to the Details tab and click the move asset link.
5. In the **Select new parent asset** pop-up, enter the new asset name in the Search field. You may enter as much or as little of the name and click **Search**. Relevant results will display.



6. Click **Select** next to the Asset that will become the new parent Asset.
7. Click **Move Asset**.
8. The moved Asset will now appear as a child Asset under the selected parent Asset in the Asset Tree.

Version Summary

Version	Changes/Updates	Date
21R3	Guide created. Asset Management broken out from larger guide. Included making changes to Asset.	08/19/2021
23R3	Removed all reference to Real Estate Manager.	08/03/2023