Adding an Asset 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.

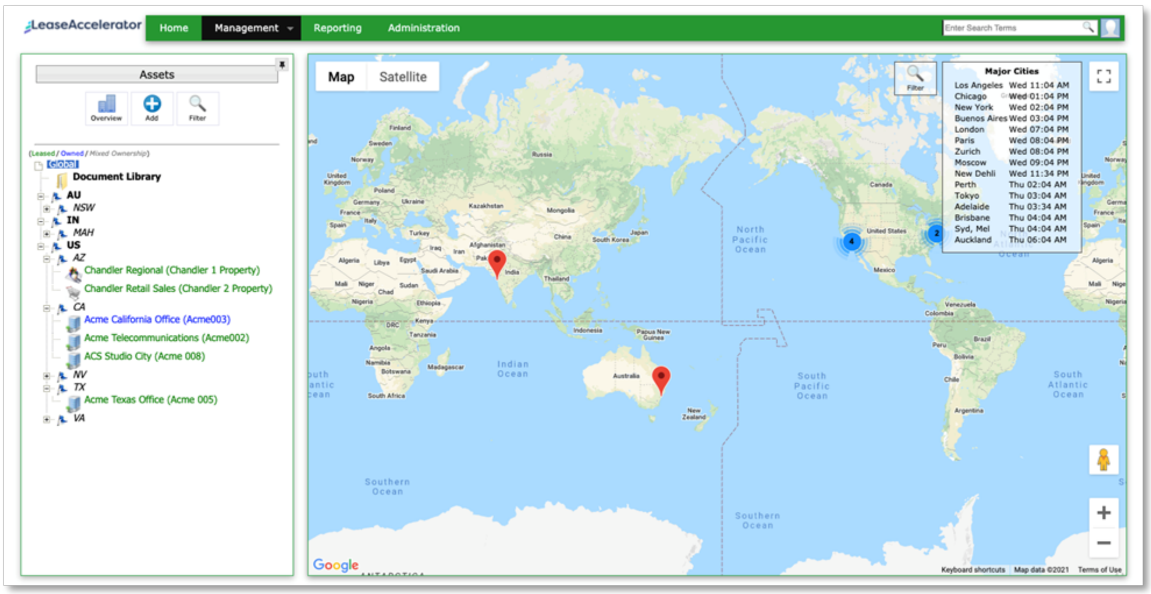
Contents

Adding an Asset

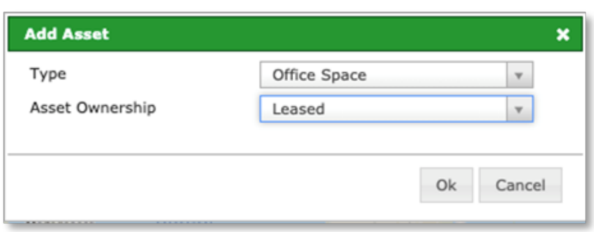
Adding an Asset involves entering information, some required and some optional, about the property. Real Estate Manager allows you to use the data you configured in Administration to facilitate the process. All Assets must be assigned to an Asset Type that is configured in Administration. Users can enter new Assets within the User Interface in Asset Management, or by using a downloaded REPIW (Real Estate Portfolio Intake Workbook), which enables the bulk import of Assets and Contracts.

Adding an Asset Within the User Interface

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



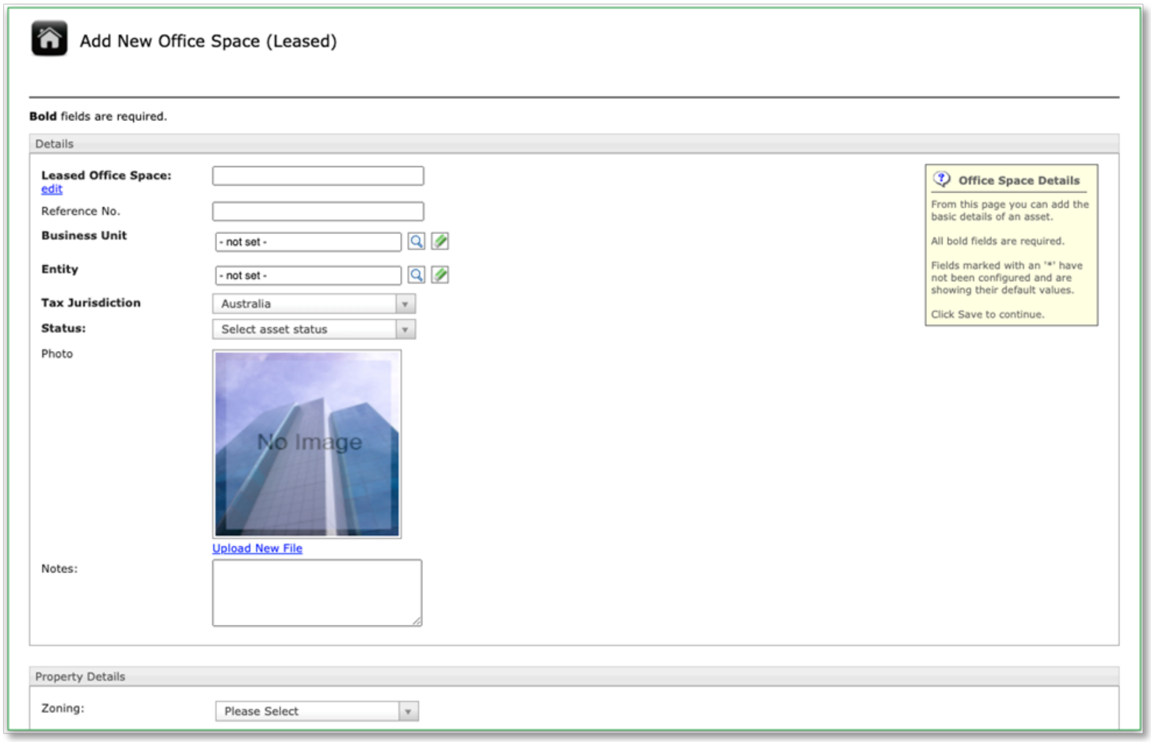
2. In the Action Panel, click **Add**.



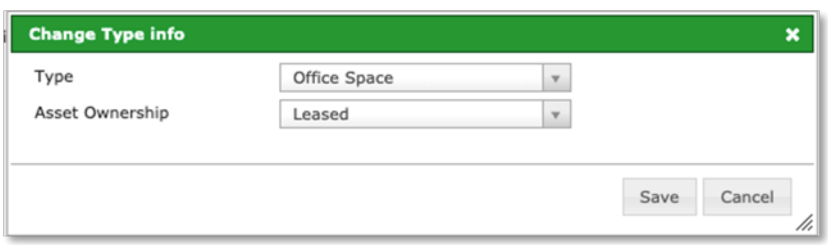
3. From the Type drop-down, select the Asset Type. The Asset will inherit the configuration for the Asset Type selected, including the Custom Fields, Folder Structure, Compliance Items, and the tabs displayed.

4. From the Asset Ownership drop-down, select the type of ownership:
   a. **Owned** – Asset you own
   b. **Leased** – Asset you lease
   c. **Mixed Ownership** – Asset that you partly own and partly lease

5. Click **OK**. The New Asset workspace opens that includes sections for Details and Address.



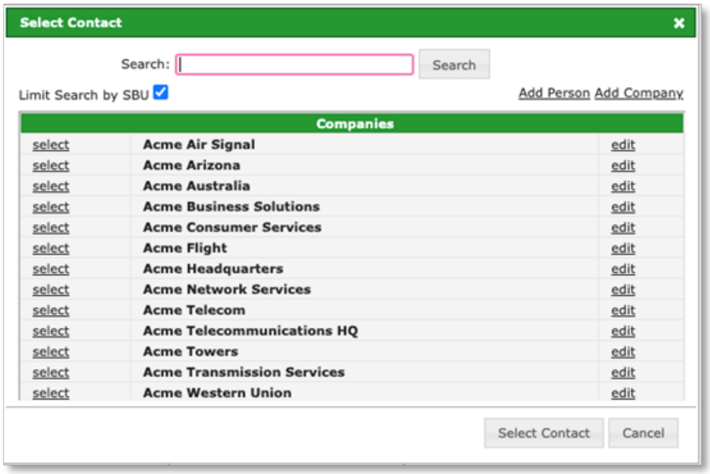
6. Enter a label for the Asset in the first field. This field name will vary depending on the Asset Type and Ownership Type.



> **Note:** To change the Ownership Type, click the edit link. In the Change Type pop-up, select the appropriate Ownership Type from the drop-down and click **Save**.

7. Enter an identifier in the Reference No. field.

8. Choose the appropriate Business Unit by clicking the **Magnifying Glass** icon.



9. You can start to type the name of the Business Unit in the Search field to narrow your list of choices, or you can click **select** next to the name of the Business Unit in the list.

10. Click **Select Contact**.

11. Choose the appropriate Entity by clicking the **Magnifying Glass** icon.

12. You can start to type the name of the Entity in the Search field to narrow your list of choices, or you can click **select** next to the name of the Entity in the list.

13. Click **Select Contact**.

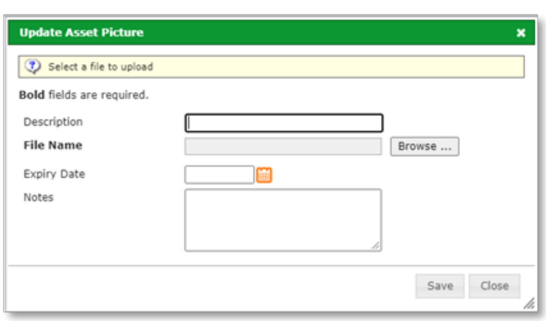
14. From the Tax Jurisdiction drop-down, select the jurisdiction that assesses taxes for the Asset.

15. From the Status drop-down, select the Status.

> **Note:** An Archived Asset does not display for selection in searches unless you select for Archived Assets to be included.

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

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



18. Click **Browse** and select the image you want to upload and click **Open**. The file name displays in the File Name field.

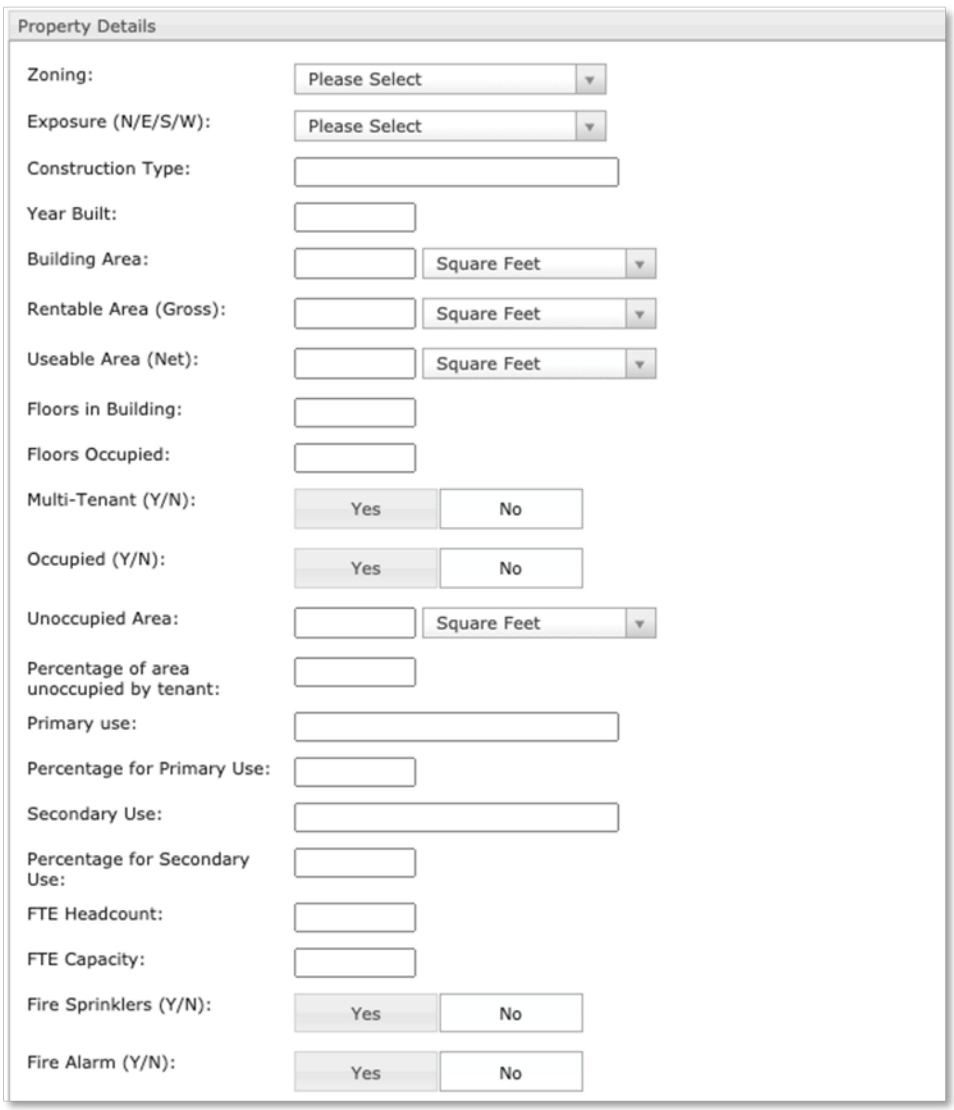
19. To set an expiration date for the file, click the Expiry Date field or the Calendar icon and select the date on which the file expires.

20. In the **Notes** field, enter any additional information about the image.

21. Click **Save**. The image will display on the new Asset.

22. In the **Notes** field, add information about the Asset as needed.

23. **Custom Fields** defined for the Asset Type selected will be displayed under the Details. Populate 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.

24. In the Address section, enter the street number and name in the Line 1 and Line 2 fields.

25. In the City field, enter the name of the city where the Asset is located.

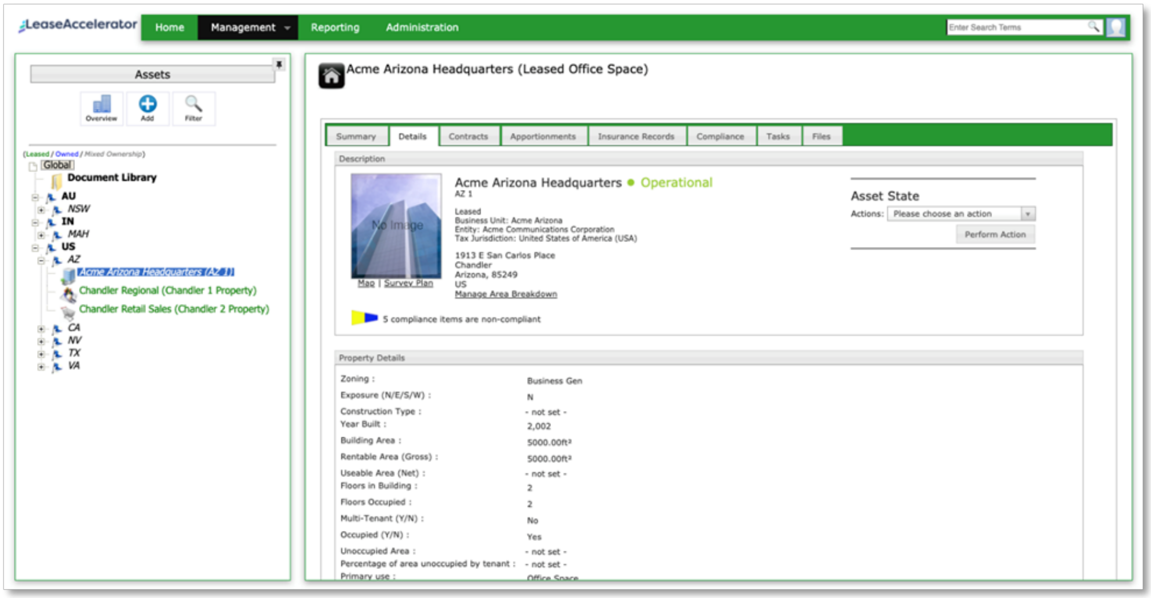
26. From the Country drop-down, select the country where the Asset is located.

27. From the State/Province drop-down, select the regional location of the Asset.

28. In the Postal/Zip Code field, enter the zip or postal code for the Asset location.

29. In the GeoLocation fields, enter the Latitude and Longitude coordinates or click the **Click here to attempt to find co-ordinates** link to auto-populate these fields based on the address provided. This will enable the Asset to be displayed on the Global Map.

30. Click **Save**. The Asset displays on the Asset Tree and the Asset Details tab displays for the Asset.



Note: The Asset Details tab allows you to edit information for the Asset

Adding an Asset 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 Real Estate Manager Customer Implementation Guide.

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

1. Start by downloading the REPIW from Real Estate Manager. 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 Real Estate Manager Client Information Guide 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 an Asset broken out from larger guide. Included adding through UI and Bulk Import.	08/04/2021
23R3	Updated Bulk Import steps, removed all reference to Real Estate Manager	08/03/2023