Contract Types User Guide

Real Estate Manager

Version 26.2.1

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Maintaining Contract Types

Contract Types

The Contract Types workspace is used to define the types of contracts expected to be used for an Asset, associate Custom Fields with each Contract Type, and define the data for each Custom Field. When contracts are created (or edited) for an Asset, they inherit the Custom Fields defined for the selected Contract Type.

Contract Types are segregated between Payable for contracts that you pay, and Receivable for contracts for which you receive payment. After you add a Contract Type, you can also assign Predefined Contract Clauses to the Contract Type. Predefined Contract Clauses provided with Real Estate Manager include the most common clauses in most real estate contracts, both payable and receivable. These may apply to some or all of your contract types and are configured separately for each Contract Type.

Administration Workspace and Master Data

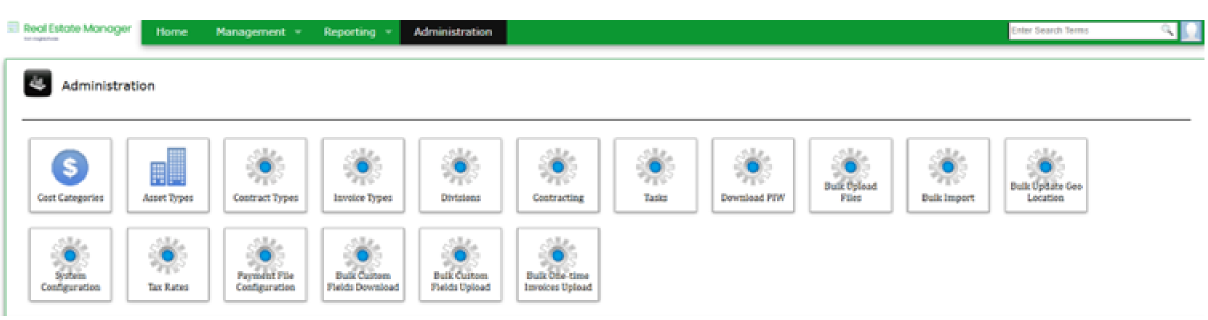
The Administration workspace establishes a global configuration for your data and how you want to organize your real estate portfolio. After you complete configuring your data, it is available to use to add assets (properties), contracts and leases, invoices, compliance requirements, and financial data such as cost centers and budgets. You may also then use the Real Estate Portfolio Intake Workbook (REPIW). You may continue to configure your data as your real estate portfolio changes by adding new data structures and removing others. The data that you configure in the Administration workspace is referred to as Master Data because it is available throughout REM.

About Master Data

Master Data is the set of data fields that you define and group under various data structures. For example, in Real Estate Manager you can define different types of invoices and associate specific data fields with each type of invoice. Master Data is unique to each client and must be defined prior to using Real Estate Manager. After the initial set up, Master Data can be edited, new Master Data can be added, and existing Master Data can be deleted. Master Data provides a consistent data structure across your portfolio while allowing for differences among different assets. Master Data makes managing your portfolio easier and more efficient.

Administration Workspace

The Administration workspace allows you to create and manage your Master Data in the system. To access the Administration workspace, from the Top NavBar, click Administration.

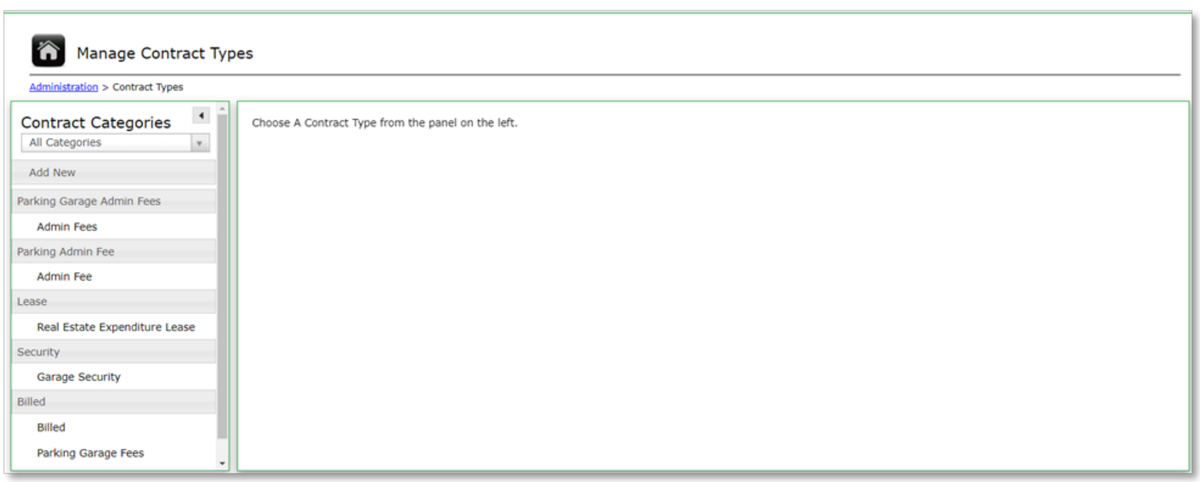


The Administration workspace tiles provide access to functions used to configure the Master Data as listed in the following table.

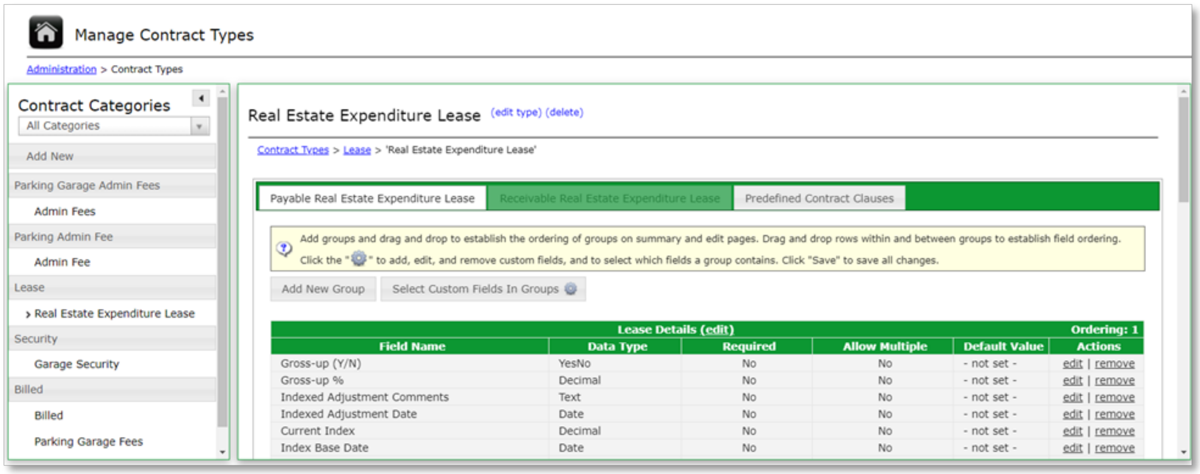
Management Tiles	Description
Cost Categories	Data related to any payable or receivable associated with an asset.
Asset Types	Organizes assets into categories that group different types of assets.
Contract Types	Organizes contracts or agreements into groups that have similar characteristics.
Invoice Types	Organizes invoices (either payable or receivable) into groups.
Divisions	Defines your business structure along with the associated accounting codes.
Contracting	Defines the types contractors and any related certifications.
Tasks	Links users with tasks for Assets.
Bulk Import	Imports contract files in bulk.
Bulk One-time Invoices Upload	Uploads one-time payable invoices in bulk.

Contract Types Workspace

The Contract Types workspace includes an Action Panel that allows you to see and select all existing Contract Categories and the Contract Types within each Contract Category.



The workspace to the right of the Action Panel is used to display and enter information about Contract Types as shown below.



Adding a Contract Category and Contract Type with Custom Field Groups

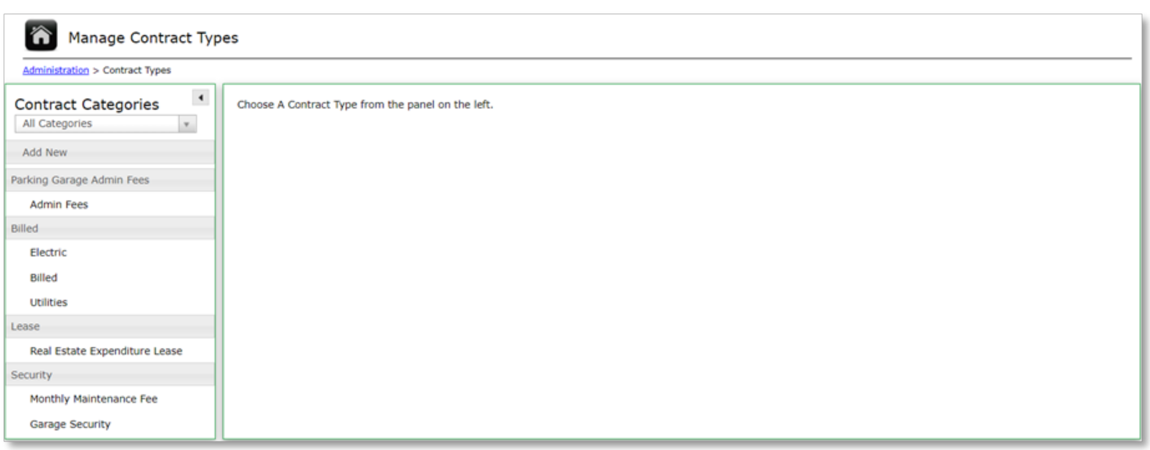
A Contract Type must be associated with a Contract Category. You cannot add a new Contract Category without adding a Contract Type to the Contract Category. At least one Custom Field Group must be added to add Custom Fields to a Contract Type.

Follow the below steps to add contract category and contract type:

1. From the Top NavBar, select **Administration**. The Administration workspace opens.

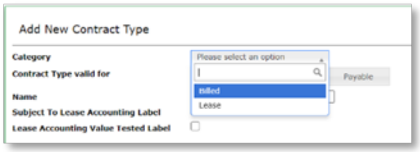
2. Click the **Contract Types** tile and the workspace opens.

3. In the **Action** Panel, click **Add New** to add a new Contract Category.

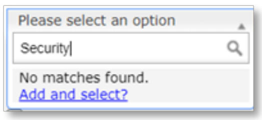


4. Click the Category drop-down and enter the label for the new Contract Type in the data field.

Note: As you type the label for the new Contract Type in the Category drop-down data field, existing Contract Types that match the characters entered display.



5. Click the **Add and select**? Link to create a new Contract Category with the label you entered.



6. Select the appropriate tab(s) as follows:

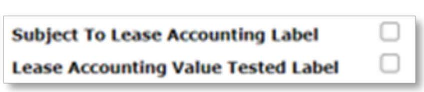
   - **All Contracts** – The new Contract Category is available to all contracts.
   - **Receivable** – The new Contract Category is available to contracts for which you are paid.
   - **Payable** – The new Contract Category is available to contracts that you pay.

   After you add a Contract Type, the tab(s) you selected are available for configuration. Tabs you selected display against a white background.

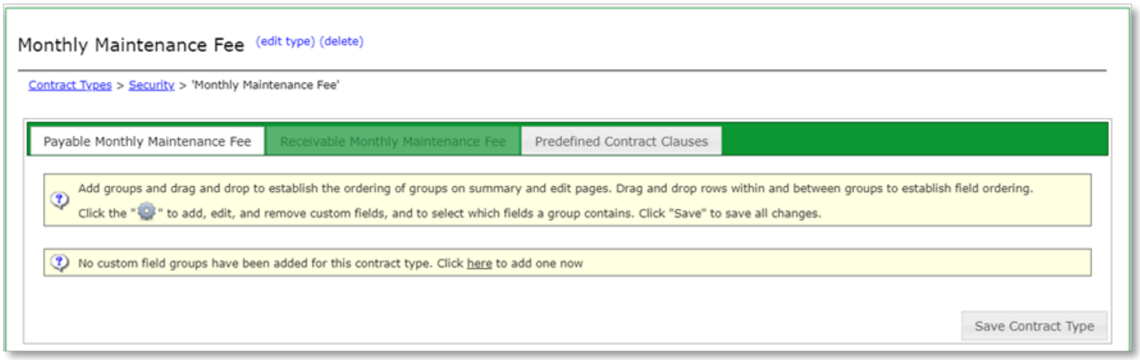
7. In addition, after you add a Contract Type, a Predefined Contract Clauses tab displays and is always available for selection.

8. In the **Name** field, enter the name or other identifier of the new contract type.

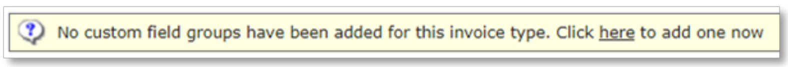
9. Click the Subject to Lease Accounting Label checkbox to indicate that the data associated with a contract will be transferred to another system because it meets the accounting criteria for recording the associated asset on the balance sheet.



10. Click **Save**. The new Contract Category displays in the Action Panel and the workspace for the Contract Category appears to allow you to add Custom Fields.

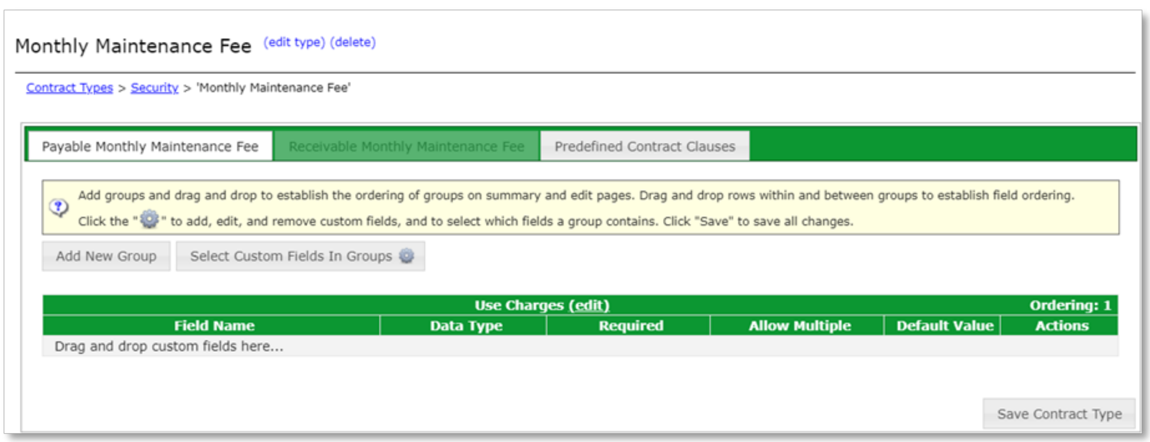


11. To add the first Custom Field Group, click the **here** link and the Add New Custom Field Group pop-up opens.



12. Enter a label for the Custom Field Group in the New Group Caption field.

13. Click **Okay** and the Custom Field Group displays on the workspace for the Contract Type.



14. To add subsequent Custom Field Groups, click **Add New Group**.

15. Repeat steps 12-13 for any additional Custom Field Groups.

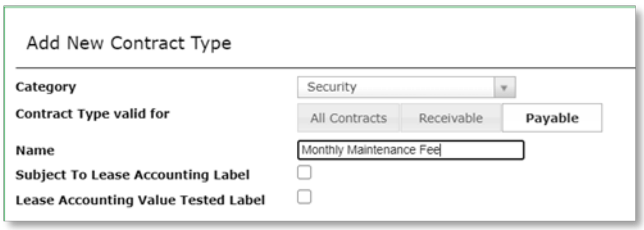
16. Click **Save Contract** to save the Contract Category, Contract Type, and Custom Field Group(s).

Adding a Contract Type to an Existing Contract Category

1. From the Top NavBar, select **Administration**, then click the Contract Types tile and the workspace opens.

2. In the Action Panel, select the Contract Category you wish to add a new Contract Type for form the drop-down.

3. Click **Add New**. The Add New Contract Type data fields display.



4. Click the appropriate tab as follows:

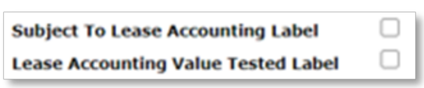
   - **All Contracts** – The new Contract Category is available to all contracts.

   - **Receivable** – The new Contract Category is available to contracts for which you are paid.

   - **Payable** – The new Contract Category is available to contracts that you pay.

5. In the Name field, enter the name or other identifier of the new contract type.

6. Click the **Subject to Lease Accounting Labe**l checkbox to indicate that the data associated with a contract is transferred to another system because it meets the accounting criteria for recording the associated asset on the balance sheet.



7. Click **Save**. The new Contract Category displays in the Action Panel.

Editing a Contract Type

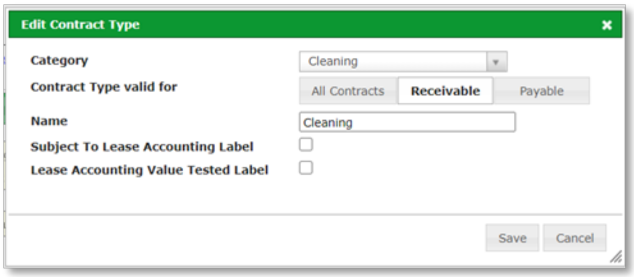
After a Contract Type is created, you can edit the name of the Contract Type or change the Contract Category for the Contract Type.

1. From the Top NavBar, select **Administration**, then click the Contract Types tile and the workspace opens.

2. In the Action Panel, click the Contract Type you want to edit.

3. Click the **edit type** link next to the Contract Type name.

4. From the Category drop-down, select another Contract Category to which to assign the Contract Type.

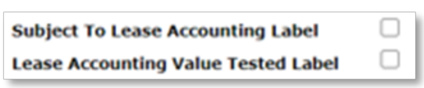


5. To change the identification of the Contract Type as All Contracts, Payable, or Receivable, select the appropriate tab to highlight the identifier you want to use.

   Note: The tabs available for selection depend on whether the Contract Type was defined for All Contracts, Payables, and/or Receivables. If the Contract Type was created only for Payable contracts, the Receivable tab will not be activated and available for selection. The Predefined Contract Clauses tab will always be activated and available for selection.

6. In the Name field, update the label for the Contract Type as necessary.

7. Click the Subject to Lease Accounting Label checkbox to indicate that the data associated with a contract is transferred to another system because it meets the accounting criteria for recording the associated asset on the balance sheet.



8. Click **Save**. The edited Contract Type displays under the appropriate Contract Category in the Action Panel.

Deleting a Contract Type

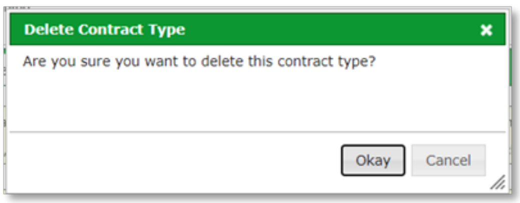
You cannot delete a Contract Type that is used for a Contract added to an Asset. You may not delete any Contract Categories that you have created.

1. From the Top NavBar, select **Administration** then click the Contract Types tile and the workspace opens.

2. In the Action Panel, click the Contract Type you want to delete.

3. Click the **delete** link next to the Contract Type you want to delete.

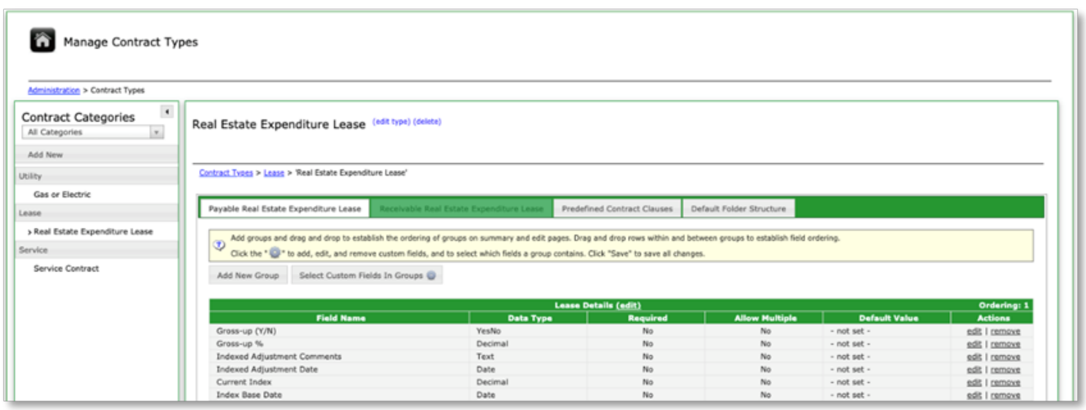
4. Click **Okay** to delete the Contract Type.



Editing a Custom Field Group

1. From the Top NavBar, select **Administration** and click the **Contract Types** tile.

2. In the Action Panel, click the Contract Type you want to edit, and that Contract Type will open up in the workspace.



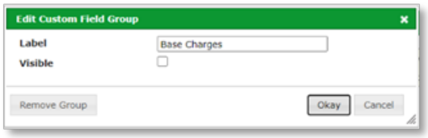
3. Click the appropriate tab as follows:

   - **Receivable** – The new Contract Category is available to contracts for which you are paid.

   - **Payable** – The new Contract Category is available to contracts that you pay.

4. Click the **edit** link next to the Custom Field Group you want to edit.

5. In the Label field, edit the name of the Custom Field Group.



6. Check the Visible checkbox to display the Custom Field Group on the Contract or uncheck the Visible checkbox to prevent display of the Custom Field Group on the Contract.

7. Click **Okay**. The Custom Field Group is updated.

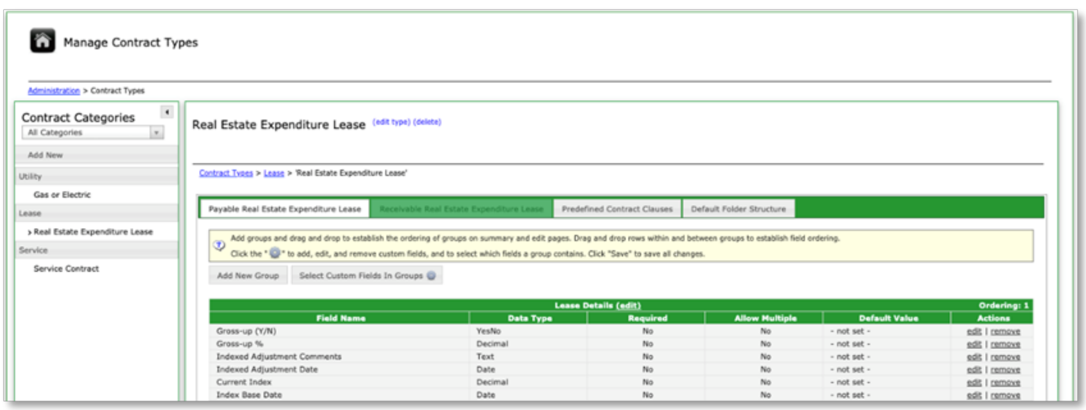
8. Click **Save Contract Type** to save the updates to the Custom Field Group.

Deleting a Custom Field Group

When a Custom Field Group is deleted, all Custom Fields assigned to it are also deleted.

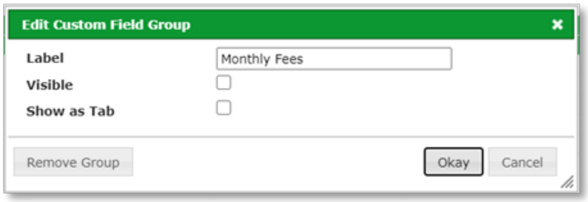
1. From the Top NavBar, select **Administration** and then click the Contract Types tile to open the workspace.

2. In the Action Panel, click the Contract Type you want to delete, and that Contract Type will open up in the workspace.



3. Click the appropriate tab as follows:
   - **Receivable** – The new Contract Category is available to contracts for which you are paid.
   - **Payable** – The new Contract Category is available to contracts that you pay.

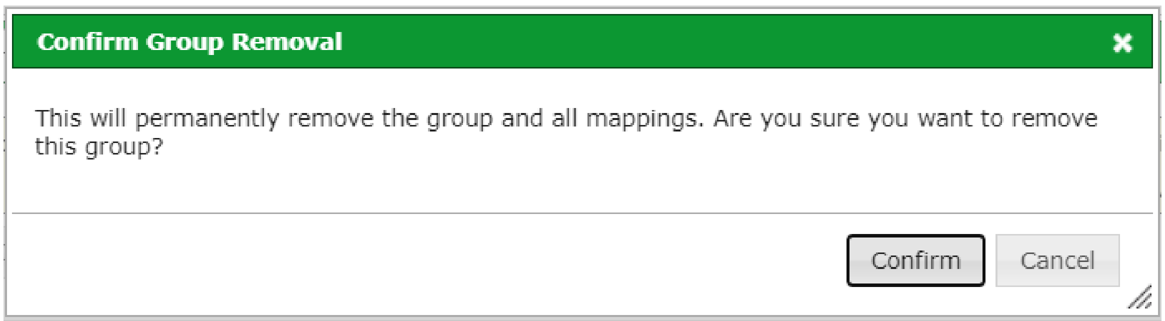
4. Click the **edit** link next to the Custom Field Group you want to delete. The edit Custom Field Group pop-up opens.



5. To delete the Custom Field Group, click **Remove Group**.

6. Click **Confirm**. The Custom Field Group no longer displays.

> **Note:** Deleting a Custom Field Group deletes all Custom Fields assigned to it. It also removes the Custom Fields from any Contracts that have the Custom Fields assigned.



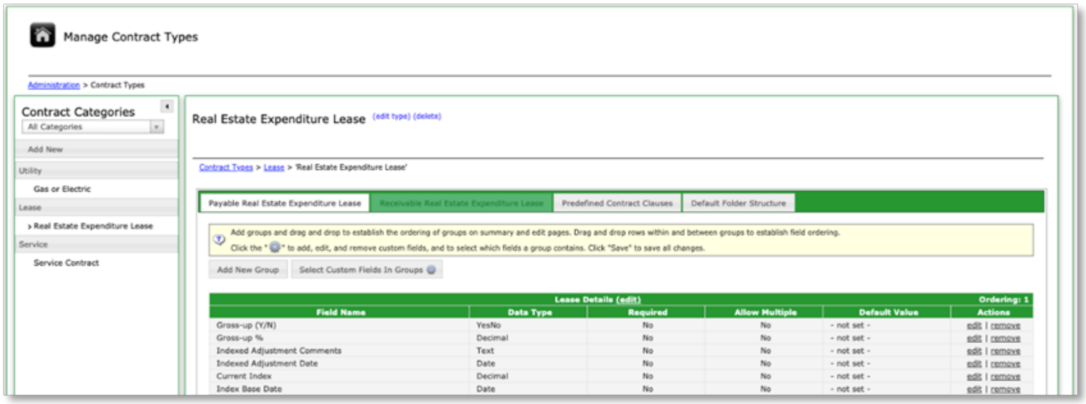
7. Click **Save Contract Type** to delete the Custom Field Group.

Adding Custom Fields to a Custom Field Group for a Contract Type

Real Estate Manager provides a set of Default Custom Fields that you can associate with a Contract Type. See Appendix: Default Custom Fields for a list of Default Custom Fields and how to configure them. You can also create Custom Fields, which is discussed in the subsequent section. After you create a Custom Field, you can add it to other Custom Field Groups.

1. From the Top NavBar, select **Administration** and then click on the Contract Types tile.

2. In the Action Panel, click the Contract Type you want to add Custom Fields for, and that Contract Type will open up in the workspace.



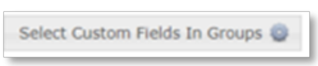
3. Click the appropriate tab as follows:

   - **Payable** - The new Contract Category is available to contracts that you pay.

   - **Receivable** - The new Contract Category is available to contracts for which you are paid.

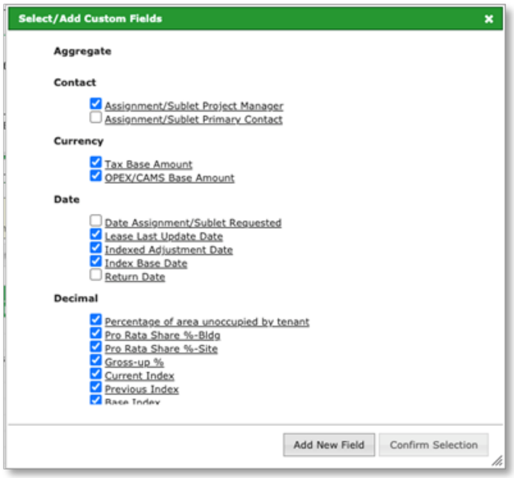
> **Note:** The tabs available for selection depend on whether the Contract Type was defined for All Contracts, Payables, and/or Receivables. If the Contract Type was created only for Payable contracts, the Receivable tab will not be activated and available for selection. The Predefined Contract Clauses tab will always be activated and available for selection.

4. Click the **Gear** icon to open the Select/Add Custom Fields pop-up.



5. Click the checkbox(es) for the Custom Fields you want to add to a Custom Field Group.

> **Note:** Real Estate Manager provides a set of Default Custom Fields that are individually configured. See Appendix: Default Custom Fields for a list of Default Custom Fields and how to configure them.

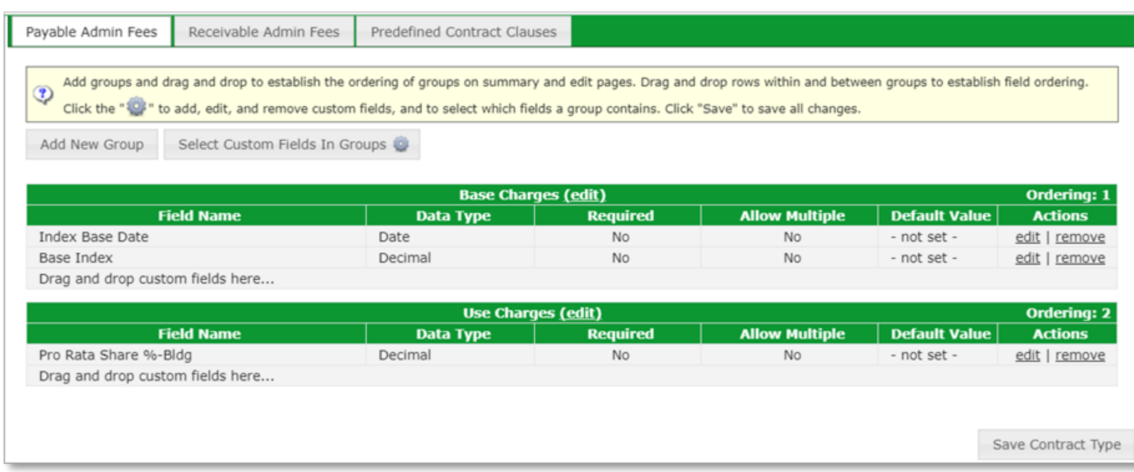


6. Click **Confirm Selection**. The selected Custom Fields display on the Contract Type workspace. All selected Custom Fields automatically display under the first Custom Field Group.

> **Note:** A Custom Field can only be associated with one Custom Field Group.

7. Columns at the top of each Custom Field Group show information about the Custom Fields:

   - Field Name – label for the field
   - Data Type – type of information and format for the data
   - Required – whether the field is required to have at least one value entered
   - Allow Multiple – whether more than one value is permitted to be entered
   - Default Value – value that automatically fills the field



8. To move a Custom Field to another Custom Field Group, drag and drop the Custom Field to the location within the Custom Field Group.

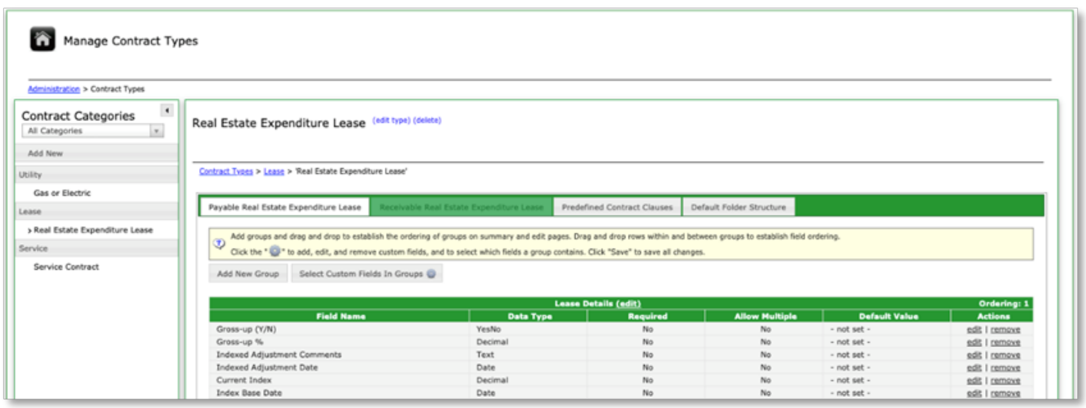
9. To order the Custom Fields within a Custom Field Group, drag and drop a Custom Field within the Custom Field Group.

10. Click **Save Contract Type** to save the Custom Fields you added to the Contract Type.

Creating Custom Fields for a Contract Type

1. From the Top NavBar, select Administration and then click on the Contract Types tile.

2. In the Action Panel, click the Contract Type you want to create Custom Fields for, and that Contract Type will open up in the workspace.



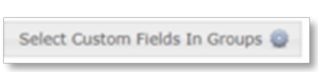
3. Click the appropriate tab as follows:

   - **Payable** - The new Contract Category is available to contracts that you pay.

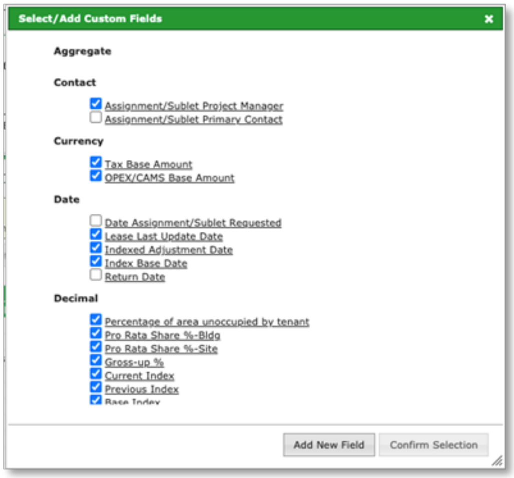
   - **Receivable** - The new Contract Category is available to contracts for which you are paid.

> **Note:** The tabs available for selection depend on whether the Contract Type was defined for All Contracts, Payables, and/or Receivables. If the Contract Type was created only for Payable contracts, the Receivable tab will not be activated and available for selection. The Predefined Contract Clauses tab will always be activated and available for selection.

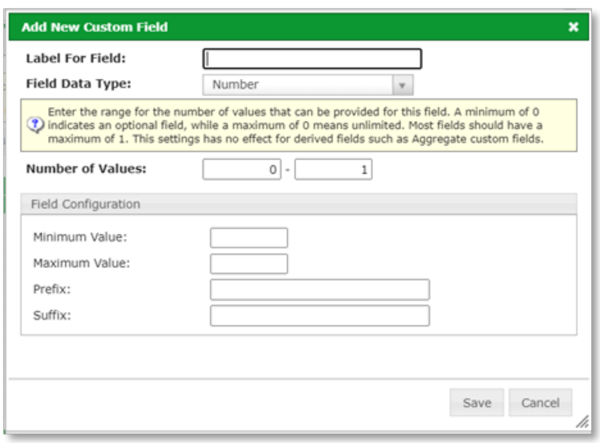
4. Click the **Gear** icon and the Select/Add Custom Fields pop-up opens.



5. In the pop-up, click **Add New Field**.



6. From the Add New Custom Field pop-up, enter a name for the New Custom Field in the Label for Field data field.



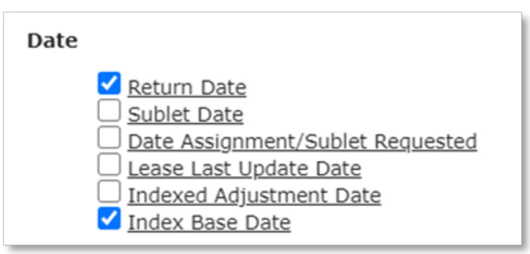
7. From the Field Data Type drop-down, select the type of data to be entered:

- **Aggregate** – combines data at the parent level for all child levels for a specific data field
- **Contact** – information for a person
- **Currency** – type of currency used
- **Date** – date related to the transaction
- **Decimal** – formats numbers that use decimals
- **Lookup** – provides a list of values for selection
- **Number** – numerical characters
- **Text** – alpha/numerical characters

- **YesNo** – binomial response is the only available selection for the field
- **Measurement** – reflects size
- **Regex** – regular expression
- **MeasurementAggregate** – combines measurement data at the parent level for all child levels

8. In the Number of Values field, enter minimum and maximum number of values that can be entered.
9. A minimum of 0 (zero) indicates that the Custom Field is optional and not a required field. Enter at least 1 to make the Custom Field a required field.
10. A maximum of 0 (zero) indicates that the number of values is unlimited. Most Custom Fields should have a maximum value of 1.
11. The Field Configuration section defines acceptable values for input. The Field Configuration differs depending on the Field Data Type selected. See Configurations for Custom Fields that describes each Field Configuration and the options available for each.
12. From the **Add New Custom Field** pop-up click Save to save the new Custom Field and the configuration settings.
13. Click the checkbox for the new Custom Field that displays in the appropriate section on the Select/Add Custom Fields pop-up.

> **Note:** Adding a new Custom Field does not automatically associate the Custom Field with the Contract Type. You must click the checkbox for the new Custom Field on the Select/Add Custom Fields pop-up to associate it with the Contract Type.



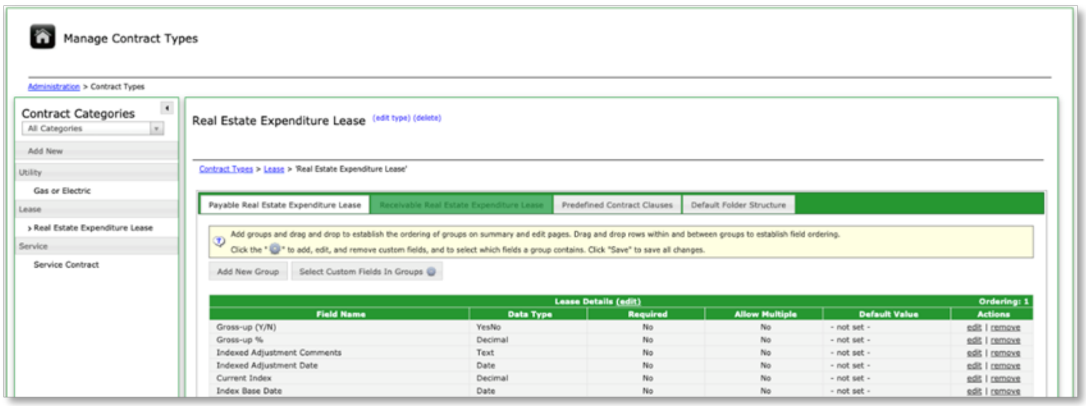
14. From the Select/Add Custom Fields pop-up, click **Confirm Selection.** The new Custom Field displays on the Contract Type workspace in the first Custom Field Group.
15. To move a Custom Field to another Custom Field Group, drag and drop the Custom Field to the location within the Custom Field Group.
16. To order the Custom Fields within a Custom Field Group, drag and drop a Custom Field within the Custom Field Group.
17. Click **Save Contract Type** to save the new Custom Field.

Editing a Custom Field Default Value

After a Custom Field is assigned to a Custom Field Group, you can edit the default value.

1. From the Top NavBar, select **Administration** and then click on the **Contract Types** tile.

2. In the Action Panel, click the **Contract Type** you want to edit a Custom Field for, and that Contract Type will open up in the workspace.



3. Click the appropriate tab as follows:

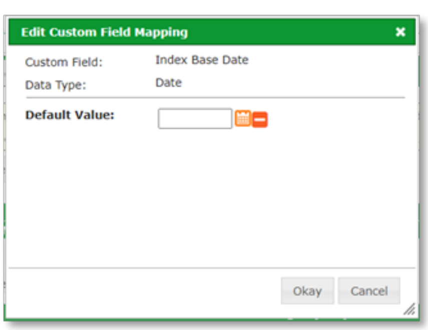
   - **Payable** - The new Contract Category is available to contracts that you pay.

   - **Receivable** - The new Contract Category is available to contracts for which you are paid.

> **Note:** The tabs available for selection depend on whether the Contract Type was defined for All Contracts, Payables, and/or Receivables. If the Contract Type was created only for Payable contracts, the Receivable tab will not be activated and available for selection. The Predefined Contract Clauses tab will always be activated and available for selection.

4. Click the **edit** link in the row for the Custom Field you want to edit.

5. Edit the Custom Field default value.

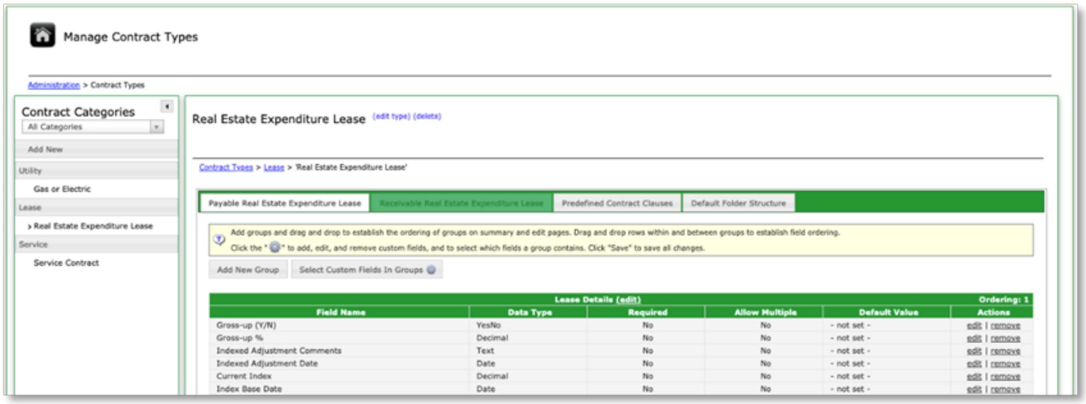


6. Click **Okay**. The default value is saved.

Deleting a Custom Field

1. From the Top NavBar, select **Administration** and then click on the **Contract Types** tile.

2. In the Action Panel, click the Contract Type you want to delete a Custom Field for, and that Contract Type will open up in the workspace.



3. Click the Payable or Receivable tab.

4. Click the appropriate tab as follows:

   - **Payable** - The new Contract Category is available to contracts that you pay.

   - **Receivable** - The new Contract Category is available to contracts for which you are paid.

> **Note:** The tabs available for selection depend on whether the Contract Type was defined for All Contracts, Payables, and/or Receivables. If the Contract Type was created only for Payable contracts, the Receivable tab will not be activated and available for selection. The Predefined Contract Clauses tab will always be activated and available for selection.

5. Click the **remove** link in the row for the Custom Field you want to delete.

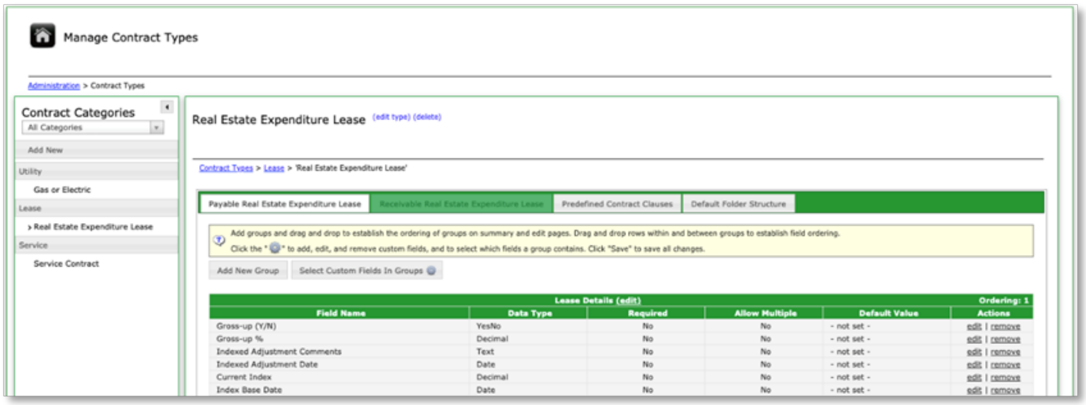
6. Click **Save Contract Type**. The Custom Field is deleted.

Adding Predefined Contract Clauses to a Contract Type

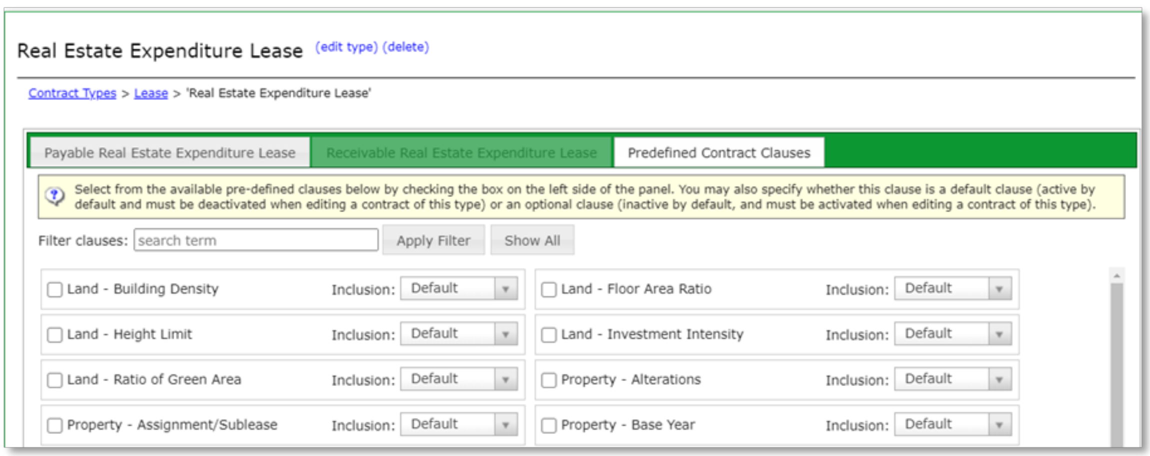
Real Estate Manager provides a function that allows you to select Predefined Contract Clauses to be assigned to a specific Contract Type. The Predefined Contract Clauses include the most common clauses in most real estate contracts, both payable and receivable. Selecting Predefined Contract Clauses automatically includes them in a Contract you add for an Asset. You can also add Contract Clauses to a specific Contract for an Asset.

1. From the Top NavBar, select **Administration** and then click on the **Contract Types** tile.

2. In the Action Panel, click the **Contract Type** you want to add Predefined Contract Clauses for, and that Contract Type will open up in the workspace.



3. Click the **Predefined Contract Clauses** tab. The Predefined Contract Clauses available display.



4. To display Predefined Contract Clauses pertaining to a term, enter the term in the Filter clauses field and click **Apply Filter**. Predefined Contract Clauses that match the term display.

> **Note:** The Predefined Contract Clauses filter searches the labels for the clauses and does not search the content of the clauses.

5. To display all Predefined Contract Clauses, click **Show All**.

6. Check the checkbox(es) next to the Predefined Contract Clauses you want to include in Contracts for the Contract Type.

7. From the Inclusion drop-down, select:

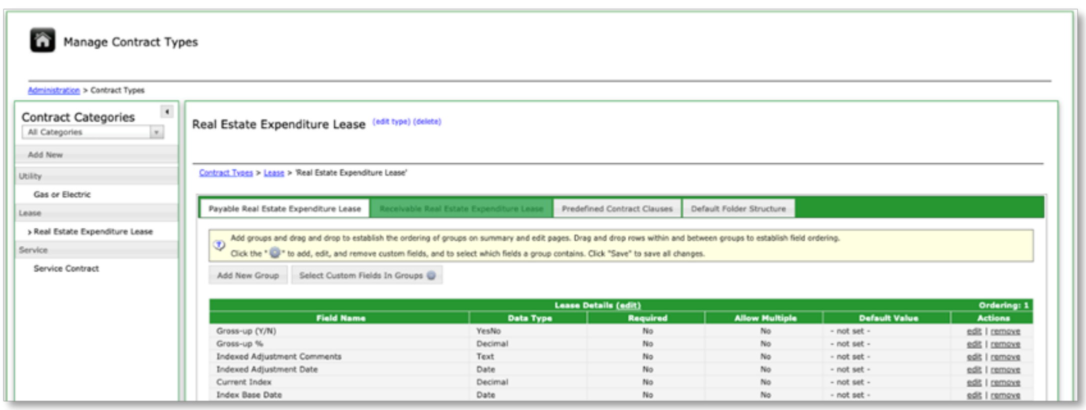
- **Default** – to require the Predefined Contract Clause.
- **Optional** – to make the Predefined Contract Clause optional.

8. Click **Save Contract Type**. Contracts for the Contract Type will include the selected Predefined Contract Clauses.

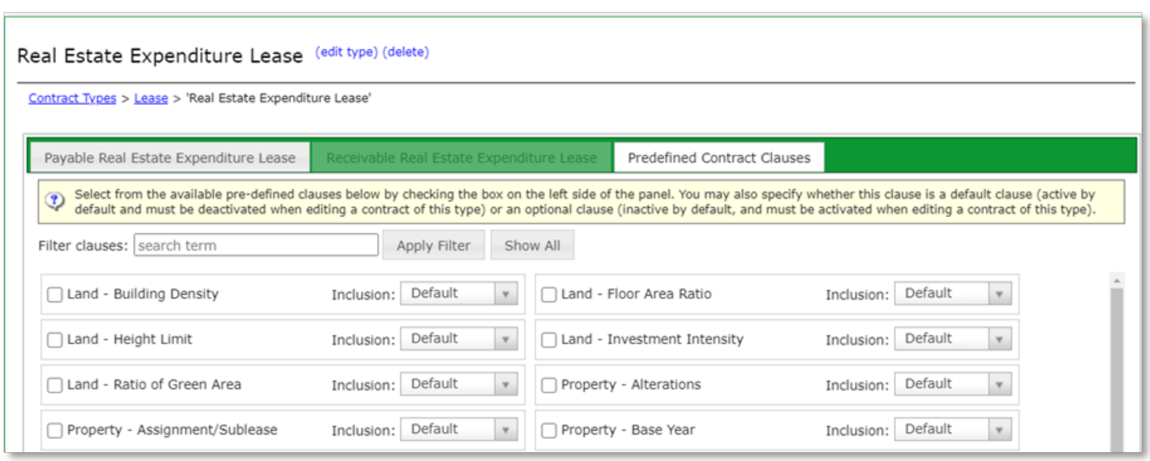
Editing Predefined Contract Clauses for a Contract Type

After you select the Predefined Contract Clause for a Contract Type, you can make updates to them by selecting new ones or removing ones previously selected.

1. From the Top NavBar, select **Administration** and then click on the **Contract Types** tile.
2. In the Action Panel, click the **Contract Type** you want to edit Predefined Contract Clauses for and that Contract Type will open up in the workspace.



3. Click the **Predefined Contract Clauses** tab. The Predefined Contract Clauses available display.



4. To display Predefined Contract Clauses pertaining to a term, enter the term in the Filter clauses field and click **Apply Filter**. Predefined Contract Clauses that match the term display.

   > **Note:** The Predefined Contract Clauses filter searches the labels for the clauses and does not search the content of the clauses.

5. To display all Predefined Contract Clauses, click **Show All**.

6. To add new Predefined Contract Clauses, check the checkbox(es) next to the Predefined Contract Clauses you want to include in Contracts for the Contract Type.

7. To remove previously selected Predefined Contract Clauses, uncheck the checkbox(es) next to the Predefined Contract Clauses you do not want to include in Contracts for the Contract Type.

8. From the Inclusion drop-down, select:

   - **Default** – to require the Predefined Contract Clause
   - **Optional** – to make the Predefined Contract Clause optional

9. Click **Save Contract Type**. Contracts for the Contract Type will include the selected Predefined Contract Clauses.

Adding User Defined Clauses(UDF) to a Contract Type

Real Estate Manager allows users to define and manage User-Defined Field (UDF) Clauses at the Contract Type level, enabling consistent clause application across all new contracts of that type. Users can reuse existing ad hoc clauses or create new ones, improving standardization and reporting.

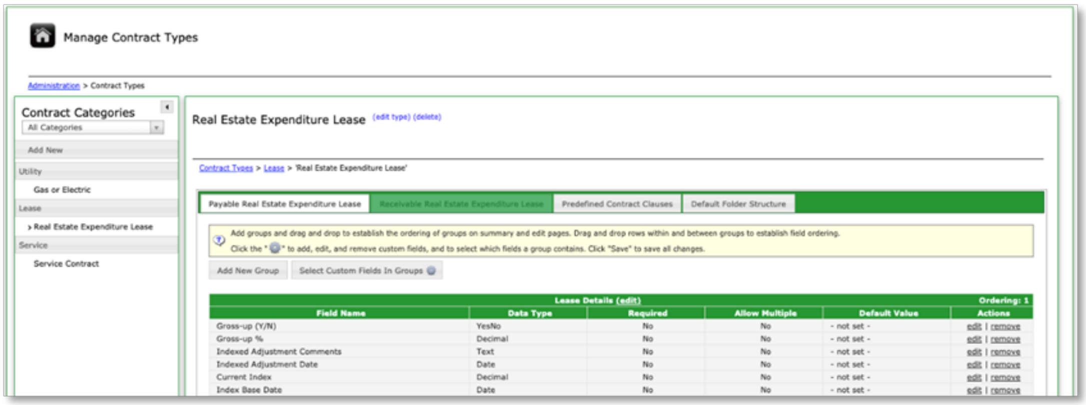
The following are the key benefits:

- Standardizes clause usage across contracts.
- Apply reusable clauses across all new contracts of a specific type.
- Improve clause visibility in contracts, exports, and reports.
- Reduces manual entry and inconsistency.
- Enhances reporting and auditing through clause-level data.
- Ensures compliance by preventing clause deletion or renaming.

To add User-Defined Field (UDF) Clauses at the Contract Type level follow the below steps:

1. From the Top NavBar, select **Administration** and then click on the **Contract Types** tile.

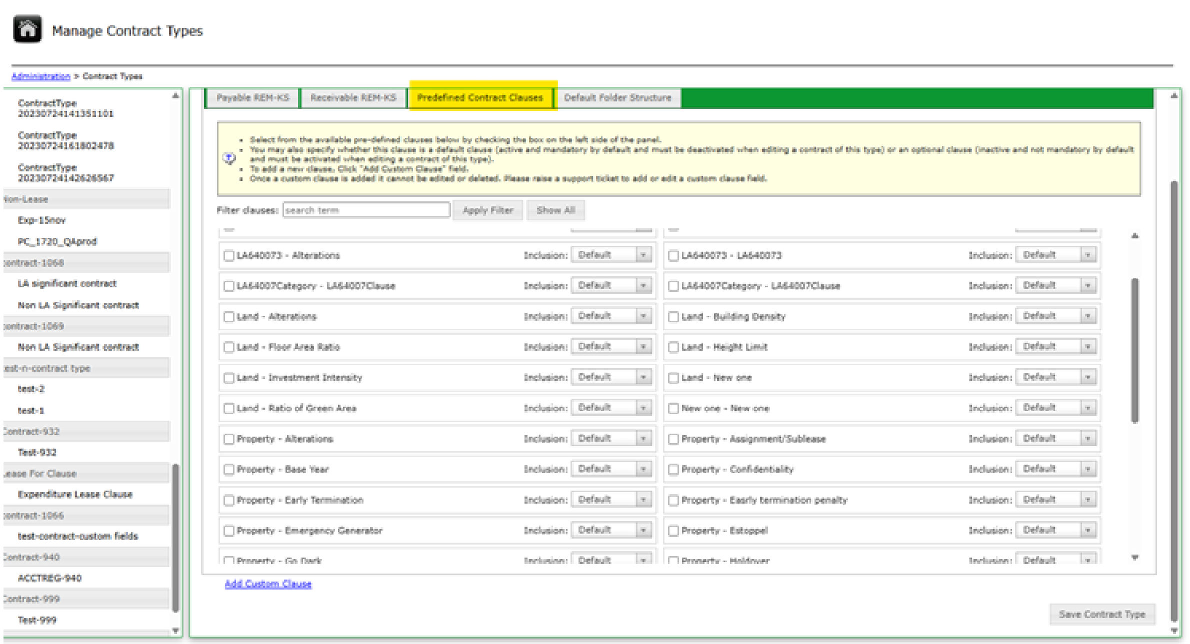
2. In the Action Panel, click the **Contract Type** you want to add User-defined Contract Clauses for and that Contract Type will open up in the workspace.



3. Scroll to the **Predefined Contract Clauses** tab.

   - Use the search bar to find existing clauses if needed.

   - Click the **Add Custom Clause** button to open the clause creation modal.



4. Add a Custom Clause

- In the Clause Creation Modal,

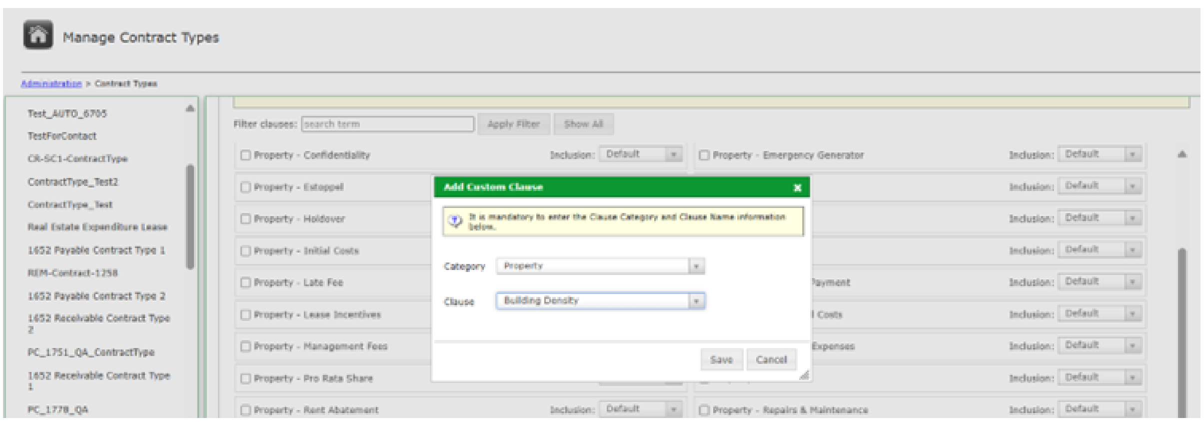
  a. Select the clause **Category**.

  b. Select an existing ad hoc clause (e.g., Property Security Deposit, Renewal Details) or create a new Clause (e.g., Early Termination, Outgoings) by clicking **Add and Select?**

  > **Note: Note:** Both are mandatory.

- The system validates entries and prevents duplication within the same contract type.

- Click **Save** to confirm. A confirmation message will appear, and a notification will remind you that changes apply only to new contracts.



> **Note:**

- Clause dropdowns in contracts include Predefined Clauses, UDF Clauses and Ad hoc Clauses. Previously selected clauses appear at the top of the list for quick access.

- Clause names cannot be edited once created.

- UDF clauses cannot be deleted to preserve historical integrity.

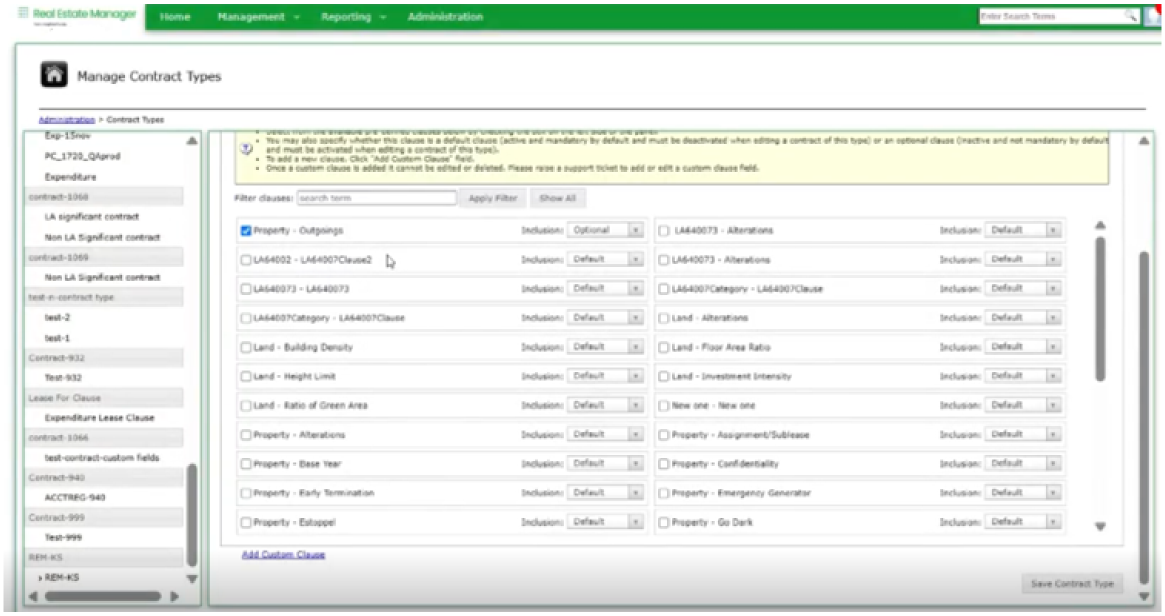
5. Update Clauses and Save Contract Type

- Use the search bar to quickly locate clauses.

- Select and apply relevant clauses to the contract type.

- You can update whether a clause is optional or default for new contracts.

- Click **Save Contract Type** to apply changes to all new contracts under that type.



6. View Clauses in Contracts

    - Create or open a new contract of the updated contract type.
    - Navigate to the **Clauses** tab.
    - You will see the newly added custom clauses listed under their respective **Clause Category** and **Clause Name**.

The user defined clauses can also be exported via REPIW. The contract file downloaded using **Bulk Import** will display the custom clauses under the appropriate columns (Clause Category and Clause Name).

The user can also run the report to view all custom clauses applied across contracts while choosing relevant fields such as **Clause Category** and **Clause Name** in the **Contract Clauses** data source of **Custom Report Builder**.

Adding Cost Per Gross Rentable Area in Custom Report

The calculation of Cost Per Area for cost categories is supported under the Current Cost section of a contract. The users can also include this metric in Custom Reports, with support for unit conversion and a dual-column format for clarity, giving property managers a powerful metric to evaluate the cost efficiency of their real estate portfolio.

Cost Per Area (P.A.) is calculated using the below formula:

Cost Per Area (P.A.) = Per Annum Cost / Gross Rentable Area

Note:

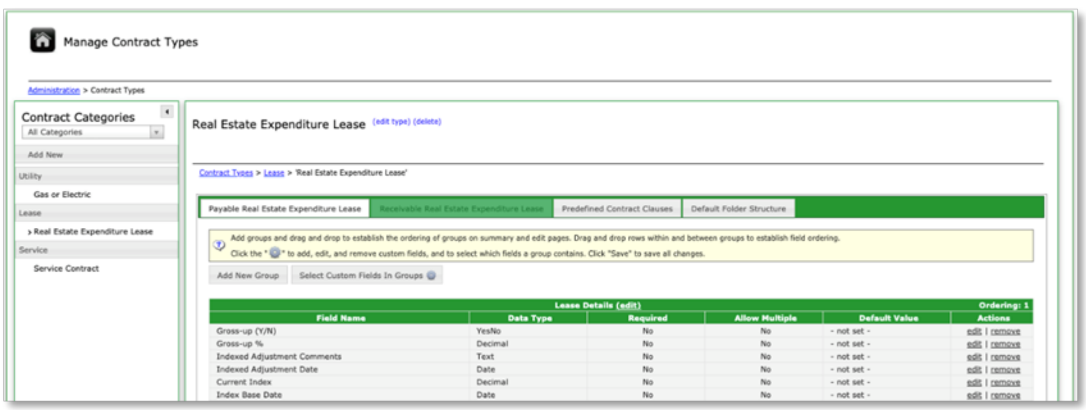
- This formula helps to evaluate cost efficiency per unit of space (e.g., per acre, per sq. ft).
- If Gross Rentable Area is not configured, the Cost Per Area field will appear blank.

The following are the key benefits of generating custom reports with cost per area:

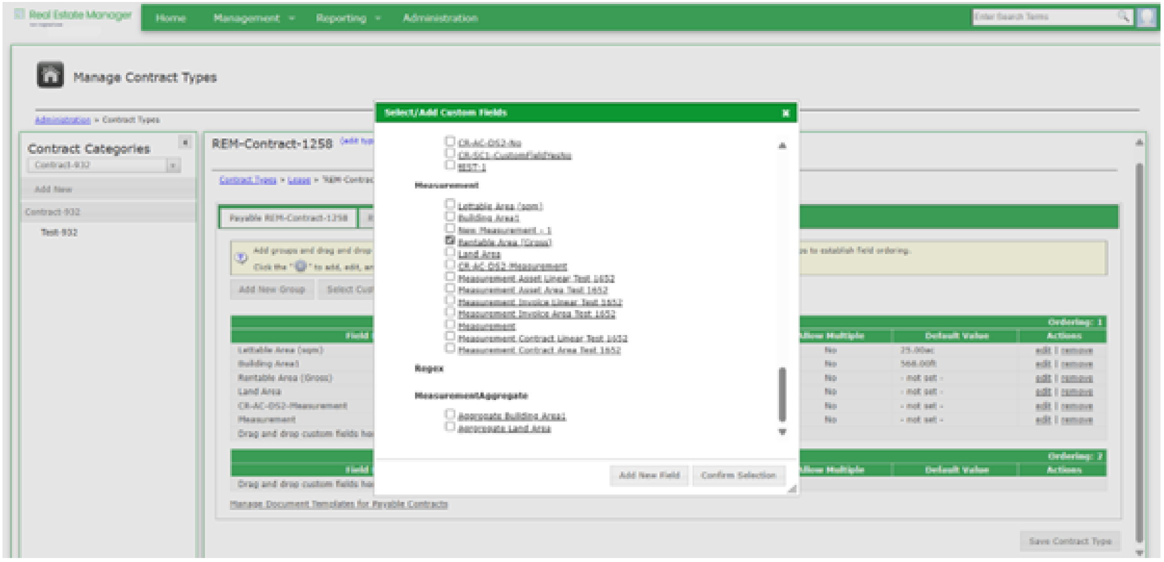
- Enables accurate portfolio-level insights.
- Standardizes cost metrics across properties.
- Improves reporting clarity and usability with dual-column formatting and unit conversion.

Follow the below steps to generate the custom report with Cost Per Area (P.A.):

1. From the Top NavBar, select **Administration** and then click on the **Contract Types** tile.
2. In the Action Panel, click the **Contract Type** you want to add cost per area for and that Contract Type will open up in the workspace.



3. To **Select/ Add Custom Fields**, add or confirm the **Rentable Area (Gross)** under **Measurements**.
4. Save the configurations.

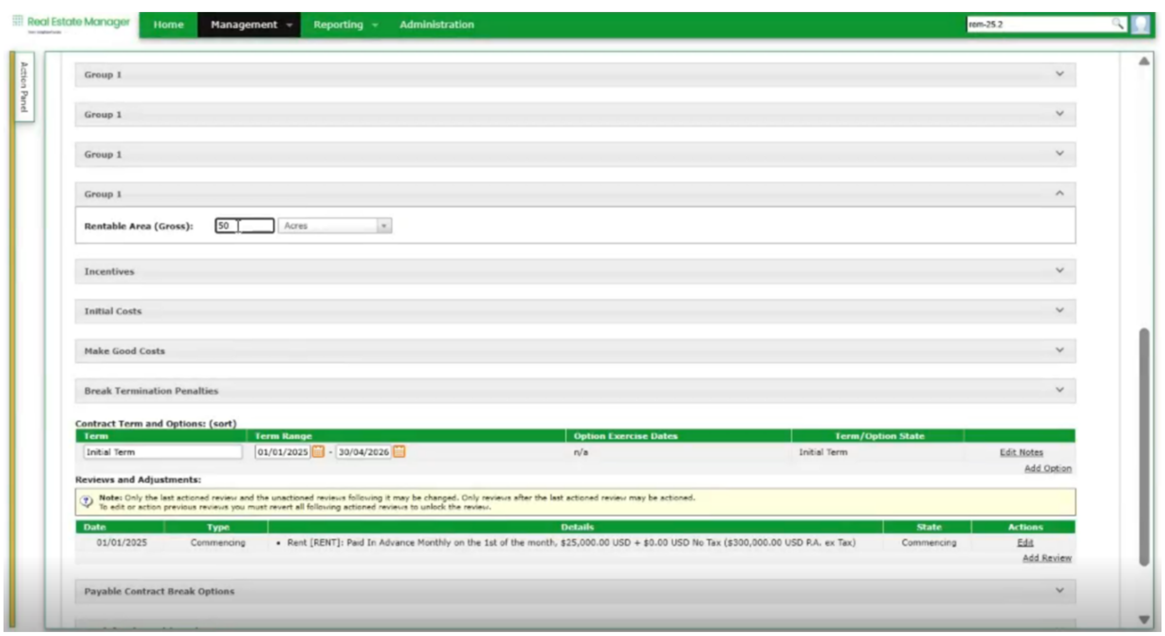


5. Create or import a new contract.

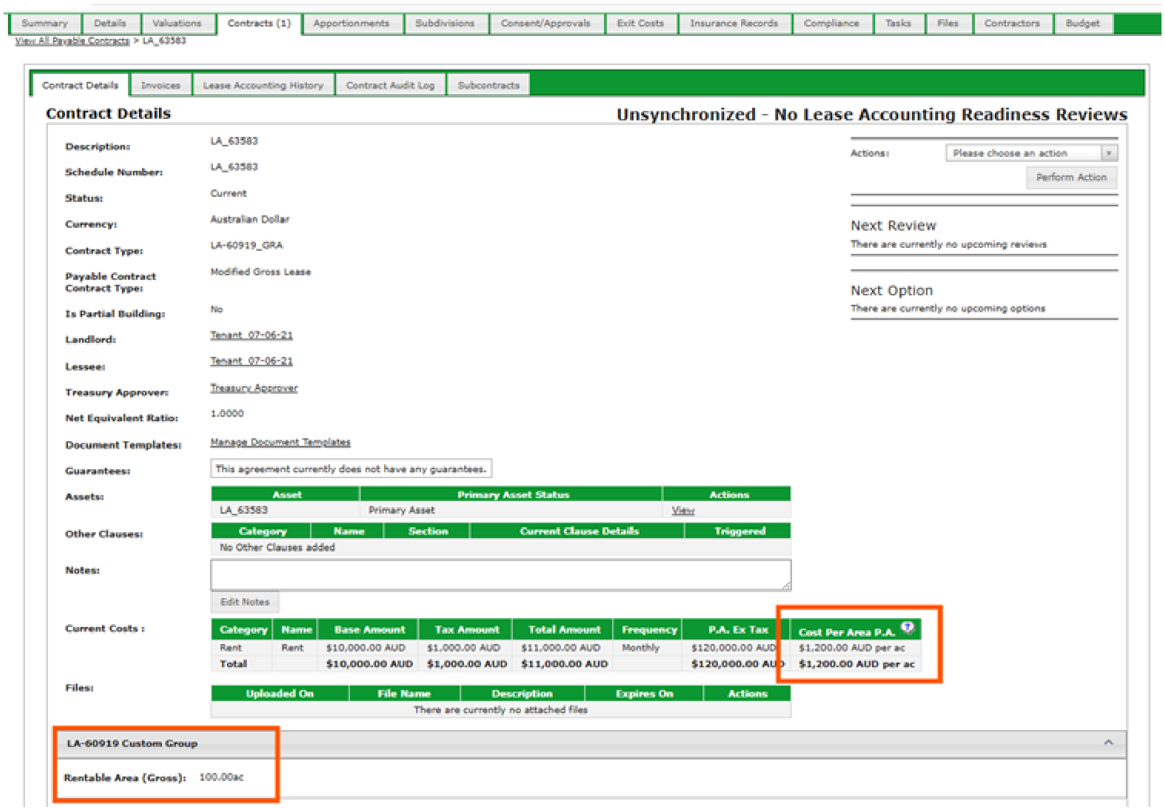
6. If the **Gross Rentable Area** is missing or set to zero, the system will not calculate the **Cost per Area** and a warning message is displayed: “Warning: Missing Data - Rentable area (Gross) is required to calculate the Cost per Rentable Area P.A. Please enter a value.”

7. Enter the **Rentable Area (Gross)** (e.g., 50 acres) and save the contract.

8. The **Cost Per Area** will now be calculated and displayed.



9. After saving, return to the contract page. The **Cost Per Area** field will display the calculated value (e.g., 6000 USD per acre).



Document Templates

Real Estate Manager enables users to generate professional contract documents by uploading custom Word templates. These templates use dynamic tags and tokens to automatically populate contract data, ensuring consistency and accuracy across all generated documents.

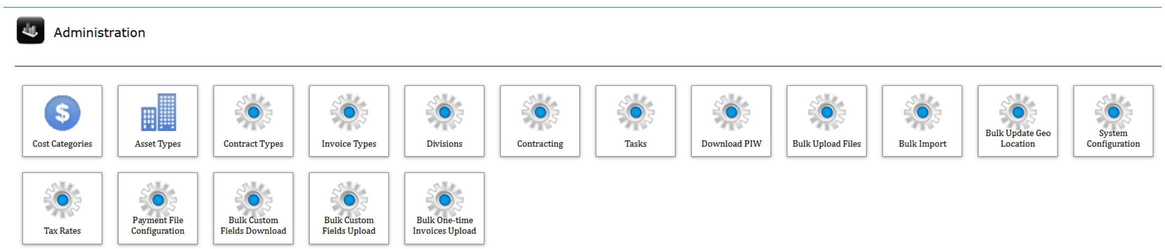
This guide covers the step-by-step process for uploading a document template to the Real Estate Manager Administration section and generating a contract document from it.

For instructions on designing and structuring templates, refer to Designing the Template section.

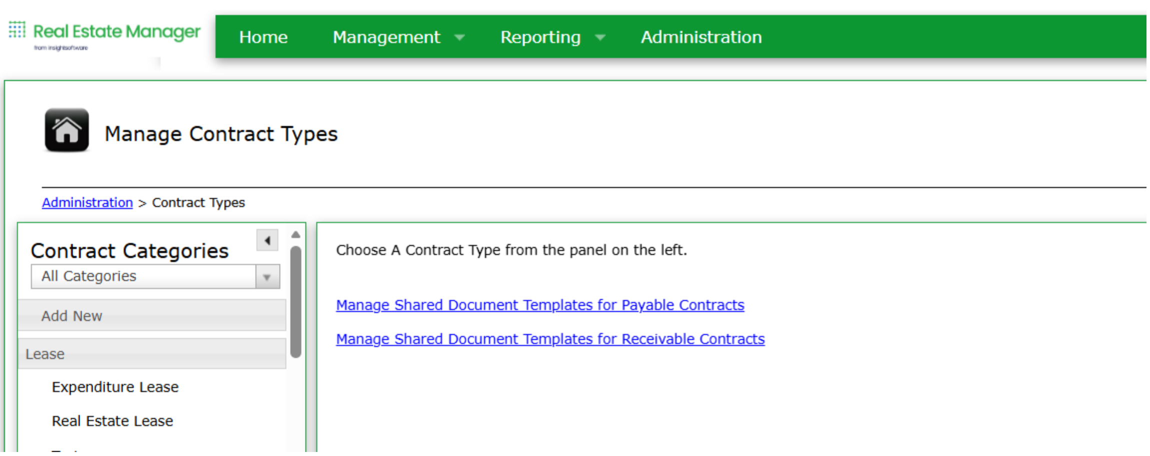
How to Use

1. Go to the **Administration** section of the Real Estate Manager platform.

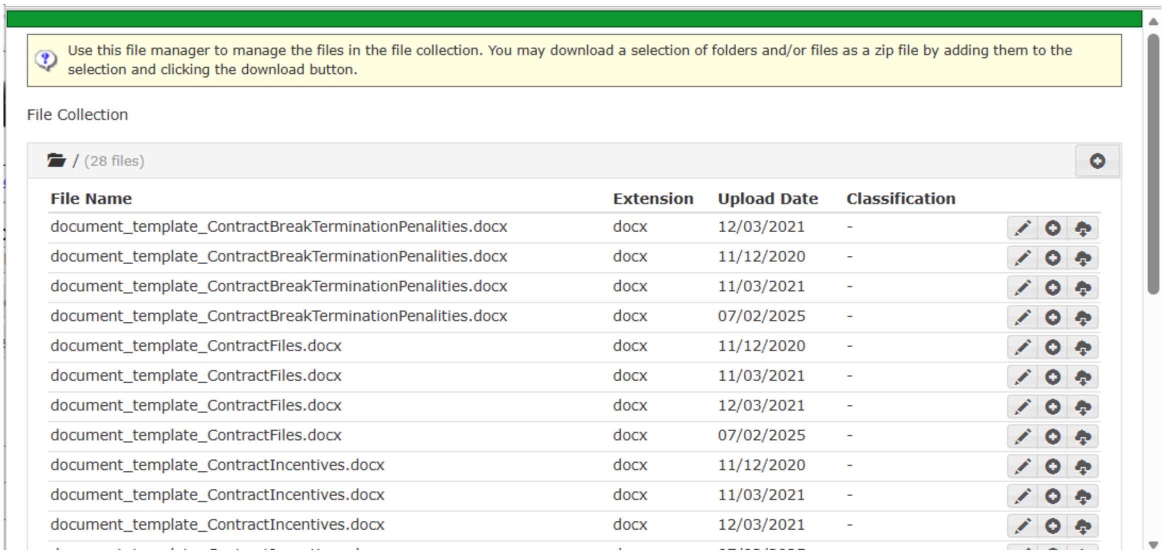
2. Select the **Contract Types** tile.



3. Choose either **Manage Shared Document Templates for Payable Contracts** or **Manage Shared Document Templates for Receivable Contracts**.



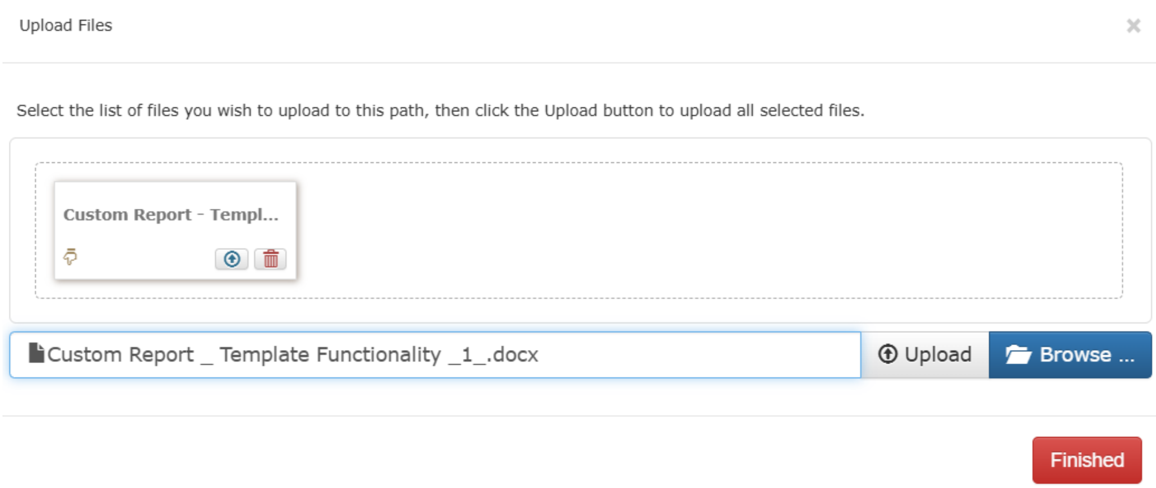
4. The system displays a modal screen.



5. Right-click next to the + icon and select **Upload Files**.

> **Note:** The user can also right click on the existing file name and email the file, rename, download or delete the file.

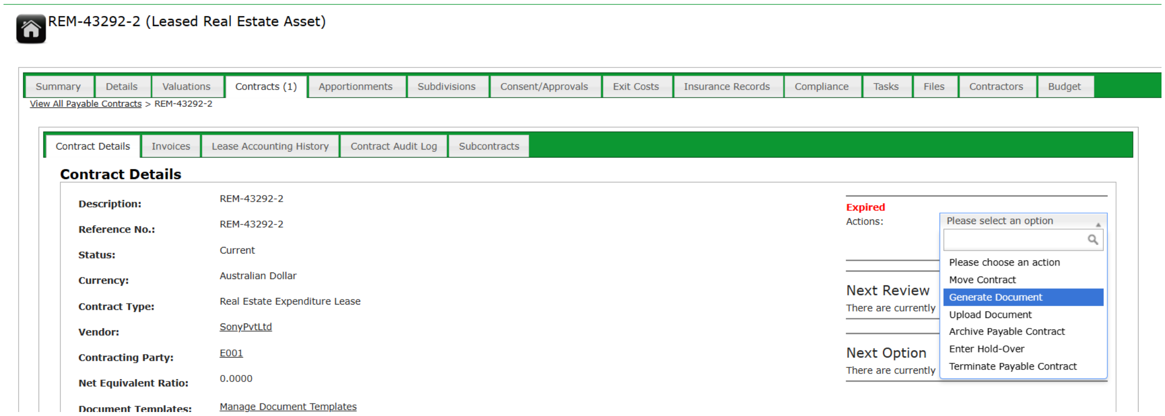
6. Choose the template file from the system and click **Upload**.



7. Once the upload is complete, click **Finished**.

8. Navigate to the relevant contract.

9. Select **Generate Document** from the **Actions** drop-down and click **Perform Action**.



10. Select the desired document type from the drop-down.

11. The system generates the document using the uploaded template and populates it with contract details.

Troubleshooting

- If the upload fails, verify that the file is a valid .docx document.
- Ensure the template follows the required structure described in Designing the Template section.
- If the generated document does not display the expected data, confirm that all tags in the template match those in the master template.

Designing the Template

This section explains how to design document templates using the master field list. Users can use tags, tokens, variables, and functions to dynamically populate contract data in Word documents. It also includes a ready-to-use template example that users can paste directly into a Word document and upload to Real Estate Manager.

Designing Templates Using the Master Field List

Required Header for All Templates

Every document template must begin with the following header:

- Document Generation
- Template

What Is the Master Template?

The master template (e.g., Document Generator Test - All Fields.docx) contains a comprehensive list of all supported elements:

- Table Tags – e.g., ##ContractProjectedPayments##
- Value Tokens – e.g., [[Contract:ReferenceNo]]
- Variables – e.g., {{A Test Date|D}}
- Functions – e.g., [[add(CurrentDay,7)]]

These elements allow users to dynamically pull contract data into a Word document.

How to Add Fields to a Word Template?

1. Open Microsoft Word and start a new **.docx** document.
2. Add the required header:
   - Document Generation
   - Template
3. Insert tags from the master template where the data should appear:
   - For contract reference: Contract Reference: [[Contract:ReferenceNo]]
   - For projected payments: ##ContractProjectedPayments##
4. Save the document with a clear name (e.g., Rent_Summary_Template.docx).
5. Upload it via the **Real Estate Manager Administration** section as described in Document Templates section.

Important Rules

- Use plain text—avoid smart quotes, shapes, or headers and footers.
- Type tags exactly as shown in the master template.
- Place table tags (##...##) on their own line.
- Users can mix static text with dynamic fields for readability.

Resources

To explore more tags and examples:

- Refer to the master template for all available fields.
- Reach out to the Real Estate Manager administrator if a tag does not render as expected.

Template Example and Reference

Below is a ready-to-use template example. Users can paste this content into a Word document and upload it to Real Estate Manager to generate contract documents.

Document Generation Template

Generated by: [[User:DisplayName]]

Date: [[CurrentDate]]

Contract Identification

This section provides the basic details that uniquely identify the contract, including its reference number, type, and description.

Contract Reference: [[Contract:ReferenceNo]]

Contract Description: [[Contract:Description]]

Contract Type: [[Contract:Type]]

Key Dates

- **Commencement Date** – This is the official start date of the contract. It marks the beginning of the contractual obligations and rights agreed upon by the parties.
- **Expiry Date** – The expiry date represents the end of the current term of the contract. After this date, the contract is no longer active unless the parties exercise renewal options.
- **Absolute Expiry Date** – The absolute expiry date indicates the final possible end date of the contract, considering all renewal options linked to the agreement—even if those options have not yet been exercised. If the absolute expiry date extends beyond the standard expiry date, it means there are renewal options available that have not been utilized.

Commencement Date: [[Contract:Commencement]]

Expiry Date: [[Contract:Expiry]]

Absolute Expiry Date: [[Contract:AbsoluteExpiry]]

Current Term: [[Contract:TermStart]] to [[Contract:TermEnd]]

Next Review: [[Contract:NextReview:ReviewDate]] (Type: [[Contract:NextReview:ReviewType]])

Financial Information

This section displays projected payments and cost changes to help track financial obligations and trends.

Projected Payments

This tag produces a table that displays all scheduled payment amounts and their corresponding due dates for the contract.

Projected Payments: ##ContractProjectedPayments##

All Contract Reviews

This tag produces a table that lists all past and upcoming contract reviews, including review dates and types.

All Contract Reviews: ##ContractAllReviews##

Contract Guarantees

This tag produces a sequential stack of tables that show the type, amount, and guarantors of each guarantee.

Contract Guarantees: ##ContractGuarantees##

Contract Incentives

This tag produces a sequential stack of tables that show the type, date, amount, and description of each contract incentive.

Contract Incentives: ##ContractIncentives##

Contract Initial Costs

This tag produces a sequential stack of tables that show the description and amount of each initial cost.

Contract Initial Costs: ##ContractInitialCosts##

Contract Make Good Costs

This tag produces a table with the date of obligation and a sequential stack of tables that show the type, amount, and description of each make good cost.

Contract Make Good Costs: ##ContractMakeGoodCosts##

Contract Break Termination Penalties

This tag produces a table with the date of obligation and a sequential stack of tables that show the type, amount, and description of each break termination penalty.

Contract Break Termination Penalties: ##ContractBreakTerminationPenalties##

Parties Involved

This section details all participants in the contract, including vendors, contracted parties, and lessors.

Vendor / Contractor

Name: [[Contract:Vendor:Name]]

Contact: [[Contract:Vendor:Contact]]

Address: [[Contract:Vendor:Address:Full]]

Contracted Party

Name: [[Contract:ContractedParty:Name]]

Address: [[Contract:ContractedParty:Address:Full]]

Lessor

Name: [[Contract:Lessor:Name]]

Address: [[Contract:Lessor:Address:Full]]

Asset Information

This section provides details of the asset associated with the contract, including name, reference, and location.

Asset Name: [[Asset:Name]]

Asset Reference: [[Asset:ReferenceNo]]

Asset Address: [[Asset:Address:Full]]

Attachments and Clauses

This section includes contract clauses and any files attached for reference or compliance.

Contract Clauses: ##ContractClauses##

Attached Files: ##ContractFiles##

Version Summary

Version	Changes/Updates	Date
21R2.1	Guide created. Contract Types broken out from larger guide.	07/28/2021
23R3	Removed all reference to Real Estate Manager.	08/07/2023