



Accessing and Navigation 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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Overview of LeaseAccelerator Real Estate Manager

LeaseAccelerator Real Estate Manager is an integrated real estate lease administration and compliance solution. With Real Estate Manager, organizations can centralize real estate data, optimize real estate lease administration and ensure compliance with lease accounting standards for their leased, sub-leased, owned and tenanted properties.

Real Estate Manager manages real estate assets from signing through ongoing payments and end-of-term, helping organizations manage contracts, valuations, compliance, and tasks. From the configurable dashboard, users can monitor critical tasks, get portfolio analytics and see the status of assets and leases at a glance. Real Estate Manager is an available add-on with LeaseAccelerator Lifecycle Edition for complete automation of the lease administration and compliance lifecycle.

Critical activities are flagged in advance of their due date on the dashboard, providing an ongoing reminder of units of work to be performed against each property. Users may define their own schedule of requirements which must be met by each asset in the system before it is deemed compliant. In doing so, Real Estate Manager allows clients to easily evaluate the compliance of their portfolio in a flexible and transparent manner.

Real Estate Manager facilitates lease management and tracks all critical dates within the portfolio and integrates with Outlook to provide calendar alerts for critical activities and events. All rent reviews, option exercise dates, and payments due or income receivable are recorded against each property record in the system allowing users to understand their current and projected rental income and liability.

Real Estate Manager supports integration with accounts payable systems to provide invoice tracking and payments. The system functions as the central point of data entry for all payments to be made for the portfolio with automatic transmission of payment files to accounts payable. Users can report on anticipated costs, paid costs, expected variance, and budget variance for all costs in their portfolio.

All expenditures and income within the system are tracked against the client's accounting GL codes allowing easy reconciliation and integration with accounting packages. In addition to GL level reporting, clients may also specify sub-GL categories against which they wish to report and manage expenditure and income.

Custom metrics such as Energy Usage, Water Consumption, or CO₂ Tonnage may be recorded against each property record. All metrics are user configurable and provide a very extensive mechanism for portfolio benchmarking and reporting. Users may report against metrics across their portfolio or export metrics data to be used in environmental reporting calculations.

Accessing Real Estate Manager

Real Estate Manager is a web-based application that requires a Company name, Username and password to access. Supported web browsers include Chrome, Firefox, Safari, Edge, and the latest version of Internet Explorer.

Logging into Real Estate Manager

Your Company name or login token will be given to you. This is case sensitive. Your Username will also be provided, but typically it is your email address before the @. (Example: would be john.doe). Username is also case sensitive.



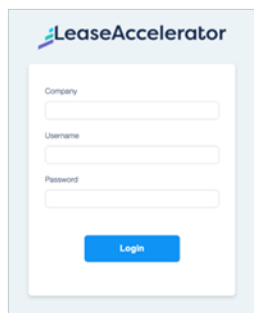
A screenshot of a login form. It has two input fields. The first is labeled 'Company' and contains the text 'Acme'. The second is labeled 'Username' and contains the text 'john.doe'.

Passwords must:

- Be at least eight (8) characters long.
- Contain at least one uppercase letter, one lowercase letter, and one digit.
- Not match any of the last twelve (12) passwords used.
- Not contain the name or common three-letter abbreviation of a month or weekday.
- Not contain your username.
- Not match any word found in the dictionary.

To log in to Real Estate Manager:

1. From your web browser, go to <https://re.leaseaccelerator.com/pm/>. The Login page opens.
2. Enter your Company, Username, and Password.



A screenshot of the LeaseAccelerator login page. At the top left is the LeaseAccelerator logo. Below it are three input fields labeled 'Company', 'Username', and 'Password'. At the bottom center is a blue 'Login' button.

3. Click **Login**. The Home workspace opens and displays the Dashboard.



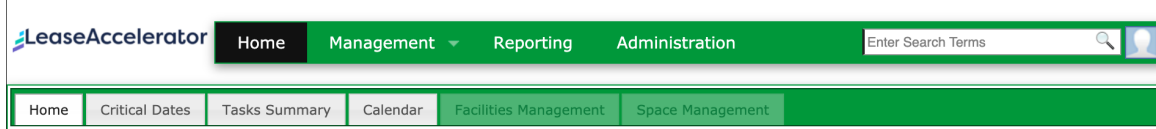
Note: If you are logging in for the first time with a temporary password provided, you will be prompted to change your password before landing in the Home workspace.

Changing Your Password

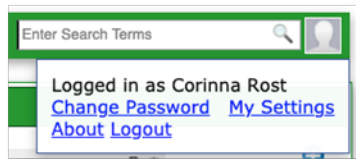
You can change your password at any time and do not need to wait for it to expire.

To change your password:

1. To change your password, hover over the silhouette icon located in the top right corner.



2. Select Change Password from the options.



3. Enter your current password and your new password, then confirm the new password and click **Change Password**.

Changing Expiring Passwords

Depending on your implementation, you may be required to periodically change your password. When your password is nearing expiration, or if your password has already expired, you will receive notification when you log in.

To change an expiring or expired password:

1. When you log in and receive the notification that your password will be expiring or has expired, enter a new password and then confirm the password.
2. Click **Change Password**. The new password will be saved and you will be taken to the Home workspace.

**Password Expiring in 5 days
23 hours**

New Password

Confirm Password

[Change Password](#)

**Your password is expiring in 5 days
23 hours**
You should change your password now to prevent this warning.
However you may click the confirm button to proceed without
changing your password. Note: Failure to set a new password before
expiry will prevent future authentication until a new password has been
set by the system administrator.

Password Expired

New Password

Confirm Password

[Change Password](#)

Your password has expired
Your password has expired and may no longer be used to authenticate
with. Please select and confirm a new password. Failure to set a new
password now will prevent future authentication until a new password
has been set by the system administrator.

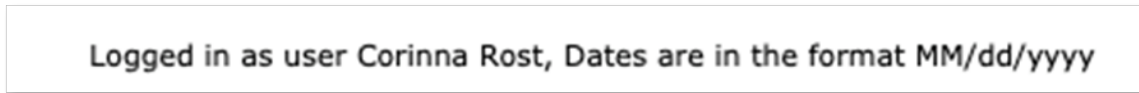


Manage My Settings

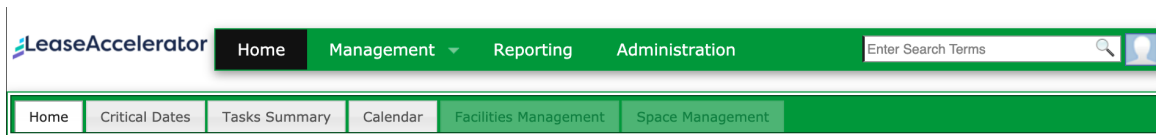
Real Estate Manager provides the ability to define the date/time format, the notifications you receive on the Calendar, and the timing of your Calendar updates.

Defining the Date/ Time Format

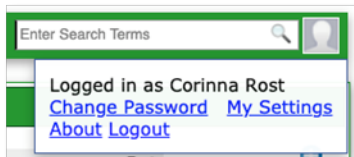
1. Users can quickly and easily identify the date/ time format by looking at the bottom of the browser window:



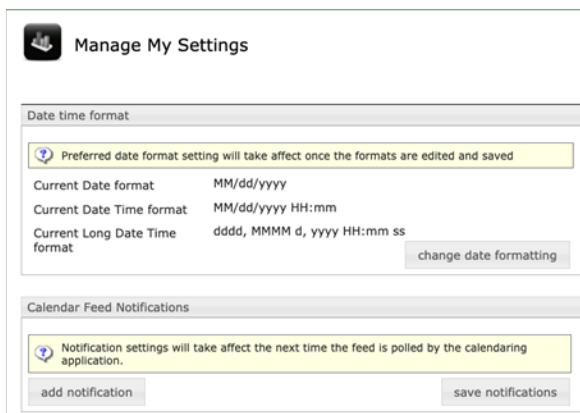
2. To define or change the date/ time format:
3. Hover over the silhouette icon located in the top right corner.



4. Select **My Settings** from the options.



5. Click **change date formatting** and the date definition fields become interactive drop-downs.



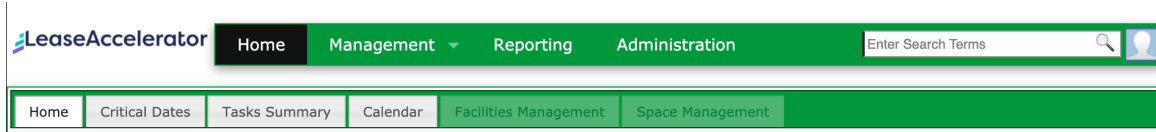
6. Select the desired formats.
7. Click **save date format**. The selected format will be applied throughout the user interface.

Setting the Calendar Feed Notification Schedule

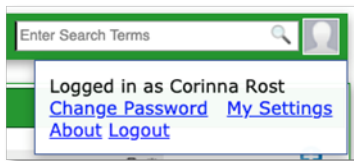
Notification settings define the timing of updates to the Calendar.

To define Notifications:

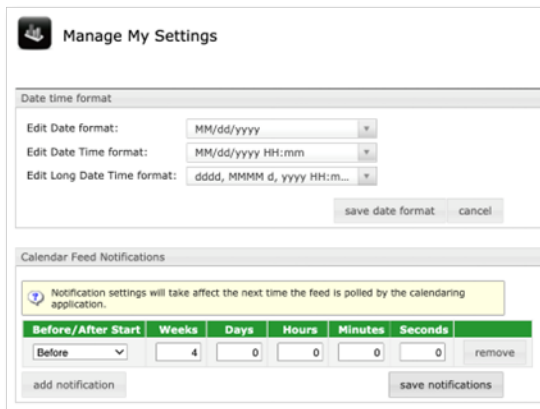
1. Hover over the silhouette icon located in the top right corner.



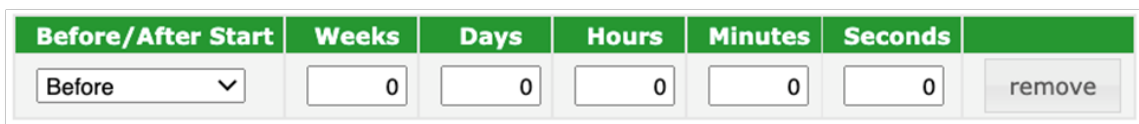
2. Select **My Settings** from the options.



3. The current Calendar Feed Notifications will be displayed. You can add a new configuration, as well as edit or remove an existing configuration, by clicking on the corresponding drop-downs and buttons.



4. Click **add notification**. A row displays for defining a notification schedule.



5. From the Before/After Start drop-down, select whether the notification should be made Before or After a critical event.

6. Define the desired timing for the notification by entering a number in the Weeks, Days, Hours, Minutes, Seconds fields.
7. To add additional notifications, click **add notification** and enter the information for each notification. By setting several notifications, you can receive several calendar alerts for critical events (e.g., 180 days, 90 days, and 30 days before expiration of the exercise period for a renewal option).
8. Click **save notification** to save the notification schedule.



Navigating Real Estate Manager

Workspaces

From the NavBar located at the top of the interface, you can access the workspaces that allow you to perform the functions available in Real Estate Manager. This Top NavBar is always visible and accessible from anywhere in the application. Below are brief descriptions of each workspace. Detailed explanations and procedures for using each workspace are provided in related user guides.



Home: This is the landing page that appears when you log in. This page includes a series of configurable mini dashboards (portlets), along with tabs for quick views of Critical Dates, a Task Summary and a Calendar feed of actionable events & tasks.

Management: This provides a drop-down menu of the following links:

- Assets – Add, delete, edit assets and leases.
- Invoices – Search for, add, view, edit, and delete payable and receivable ad-hoc and recurring invoices.
- Payments – Create, submit, review, and approve batches of invoices for payment.
- Contact Register – Search for, add, edit, and delete people and companies.
- Budgets and Forecasting – Upload & view budgets, and create, edit, view, and export forecasts.
- Lease Accounting Synchronization Management – Manage the process for synchronizing leases to the Lease Accounting Manager.

Reporting: Run, edit, save, and export the suite of highly configurable available reports, which are categorized into tabs, including Assets Reports, Compliance Reports, Contract Reports, Financial Reports, and Custom Reports.

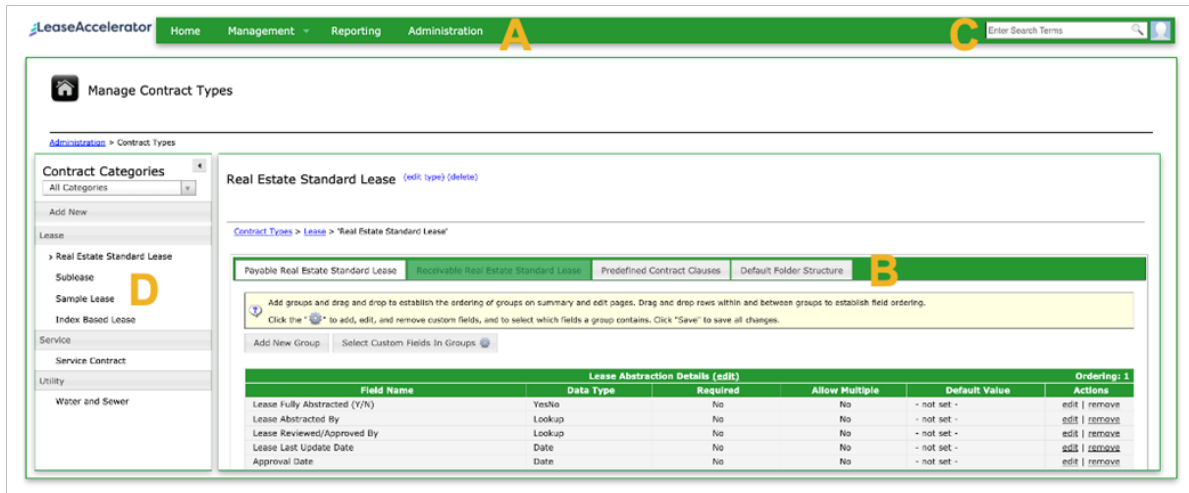
Administration: This is where you'll find tiles to manage and configure Cost Categories, Asset Types, Contract Types, Invoice Types, Divisions, Contracting, and Tasks.



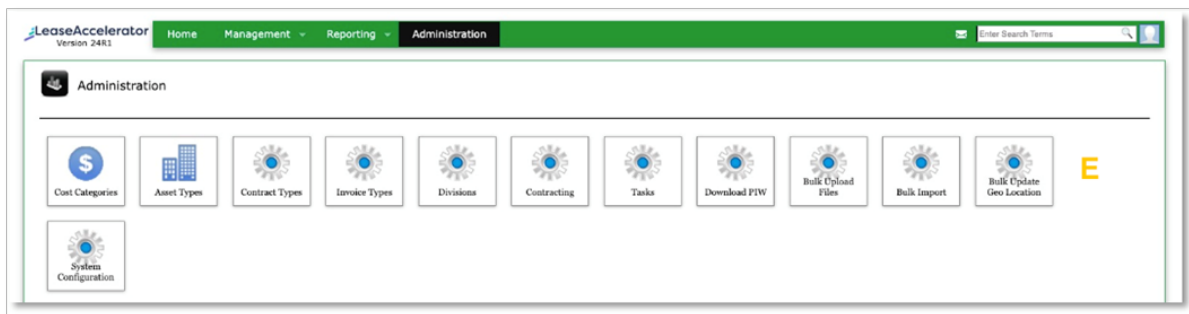
Note: It is in this workspace where you can download a preconfigured REPIW, bulk upload files, bulk import populated REPIWs and bulk update your geo locations.

Search: Search for any asset or contract.

Example of a Workspace



Example of a Workspace with Tiles



The following table describes each workspace component.

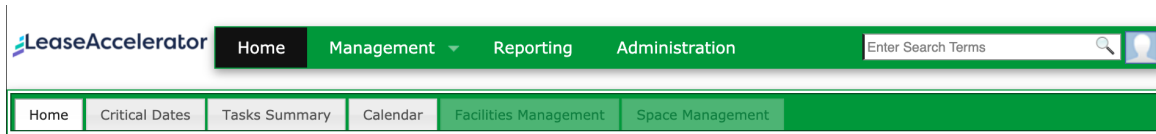
Reference	Dashboard Component	Description
A	Top NavBar	Menu at the top of the Home workspace that allows you to access the workspaces within the system: Home, Management, Reporting, and Administration. All functions are available from the different workspaces.
B	Tabs	Tabs are defined within each workspace and provide access to functions within the workspace.
C	Search	The Search function allows you to search from all workspaces.
D	Action Panel	The Action Panel lists various components that may be used to access specific data workspaces. This is typically collapsible in most workspaces.
E	Tiles	Tiles identify additional workspaces that may be accessed.

Search

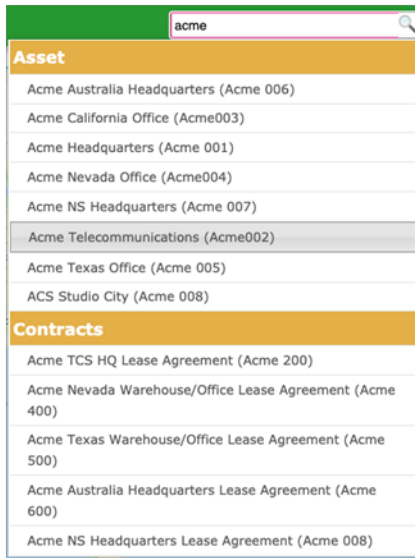
The Top NavBar includes a Search function that allows you to search for information related to any asset or contract associated with an asset.

To search:

1. In the Top Search Bar, enter the search criteria.























2. As you enter the search term, results will display. Click the appropriate search result to display the information.



































Icons

Real Estate Manager uses a consistent set of icons that allow you to manage your view of information. The table below shows the icons used throughout the system.

Icon	Name	Description
	Expand Down	Expands or collapses a list of items.
	Collapse Up	
	Drag-and-drop	Allows you to move an image or section to another location.
	Add Portlet	Allows you to create a new Portlet that you can configure with information you want to display on the Home tab.
	Save	Saves the component actively being worked on. This could be portlets, portlet layout, or reports that have been generated.
	Filter	Allows you to search using criteria you specify.

Icon	Name	Description
	Person Icon	Displays options to change your password, manage settings, display the version number and logout.
	Calendar	Displays a Calendar that allows you to select a specific date.
	Clear Date	Removes a date recorded in a field.
 	Back Forward	Scrolls to the previous or following page on the Calendar tab.
	PDF	Generates and downloads a PDF.
	Tilt Map	Changes the perspective of the street view of a map.
	Rotate	Rotates the view of a map.
	Overdue Task	Opens the Asset Tasks tab that lists Tasks.
	Non-compliant Item	Opens the Asset Compliance tab that lists Compliance Items.
	Search	Allows you to search for assets and contracts.
	Erase	Removes data in the field.
	Magnifying Glass	Allows you to zoom in on an element.
 	Expand Collapse	Increases or reduces the displayed view.
	Gear	Provides access to options available.
	Overview	Returns you to the overview workspace of Contact Register.
	Add	Accesses functionality that allows you to add an Asset.
	Asset	Identifies location of an asset defined in the system. Hover over the Asset icon to display the name of the asset. Click the Asset icon to display the Summary tab for the Asset in the Management workspace
	Multiple Assets	Identifies a location at which multiple Assets are defined in the system.

Icon	Name	Description
	Full Screen	Displays in a full browser page. To reduce the view from a full browser page, press <ESC> on your keyboard.
	Exit Full Screen	Removes full-screen display.
	Expand Pop-up	Stretches a pop-up to display the full view of the information on the pop-up.
	Pin	Retains view of the Action Panel on the workspace.
	Unpin	Collapses the view of the Action Panel.
	Radio Button	Used to select an option that usually requires you to enter data.
	Extract	Extracts data to an Excel workbook.
	Expand Tree	Used to list all data in a hierarchy.
	Collapse Tree	Used to hide data in a hierarchy.
	Use Contract Vendor	Uses the Vendor assigned to a Contract for the Invoice.
	Add New Row	Used to add a new row for adding Costs to an Invoice.
	Trash Can	Deletes a component or line item.
	Clock	Opens the history of an item.
	Options	Displays a set of options to perform different actions.
	Calculator	Performs arithmetic operation.
	Delete	Removes data from a field.
	Move	Moves defined fields for a Contract Cost to a Recurring Invoice and visa-versa.
	Remove Filter	Deletes a filter added to a report.
	Delete	Removes a Data Source from a Custom Report.
	Eye	Eliminates a column from display on a Custom Report.

Icon	Name	Description
	Copy Field	Copies the data in the field entered to all other fields in the same row.
	Delete Sort	Removes the sorting of a Column on a Custom Report.
	Sort Descending	Sorts data in a report column from smallest to largest value in a Custom Report.
	Sort Ascending	Sorts data in a report column from largest to smallest value in a Custom Report.
 Visible  Not Visible		Allows a Column in a Custom Report to be visible or not.
	Align	Aligns the values in a Column in a Custom Report Left, Center, or Right.
	Toggle Global Report	Switches between global user access to a Custom Report and access for the user that created the Custom Report.
	Save Report	Saves a Report with the same Report Name.
	Save as New Report	Saves a Report with a new Report Name.
	Generate and Download Report	Allows you to generate, download, and view the Excel workbook for a report without saving the report.
	Update Report Template	Allows you to make changes to the specified report template, where applicable.

Version Summary

Version	Changes/Updates	Date
21R2.1	Guide created. Overview and Navigation broken out from larger guide.	07/06/2021
21R2.1	Moved Home workspace to separate guide.	07/22/2021
23R3	Removed all reference of Real Estate Manager.	08/03/2023
24R1	Updated screenshots and verbiage for added tiles in Administration workspace.	01/19/2024

