MAGEX
Real Estate Manager

1st Edition

This guide is designed to help you get started with your Real Estate Manager's software. Its goal is to provide a quick reference for you to keep on hand.

To get instructions on how to carry out operations, therefore answering the "How to" question, we invite you to visit the Help section at http://www.magextechnologies.com/en-CA/rem_support.aspx

You will be able to conduct a search by keyword in the Search field and have access to training video tutorials at the bottom of the section.

Real Estate Manager allows the user to manage a few doors to hundreds of rental units. According to the needs and growth of your housing inventory, you may not need all its functionalities. You will find nonetheless this little something that will help improve your management.

Enjoy your reading!

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1. Understand and handle the structure and the interface

The first thing to do is to understand the software structure and its interface by reading the following section.

1.1 Menu Distinction

Real Estate Manager has two menus: one at the top of the screen and one on the left of the screen.

You will find at the top all options and functionalities related to your management software. The left menu provides a quick access to the most commonly used modules and reports.

1.2 Toolbar

Add | Delete | Rename | Save and Close
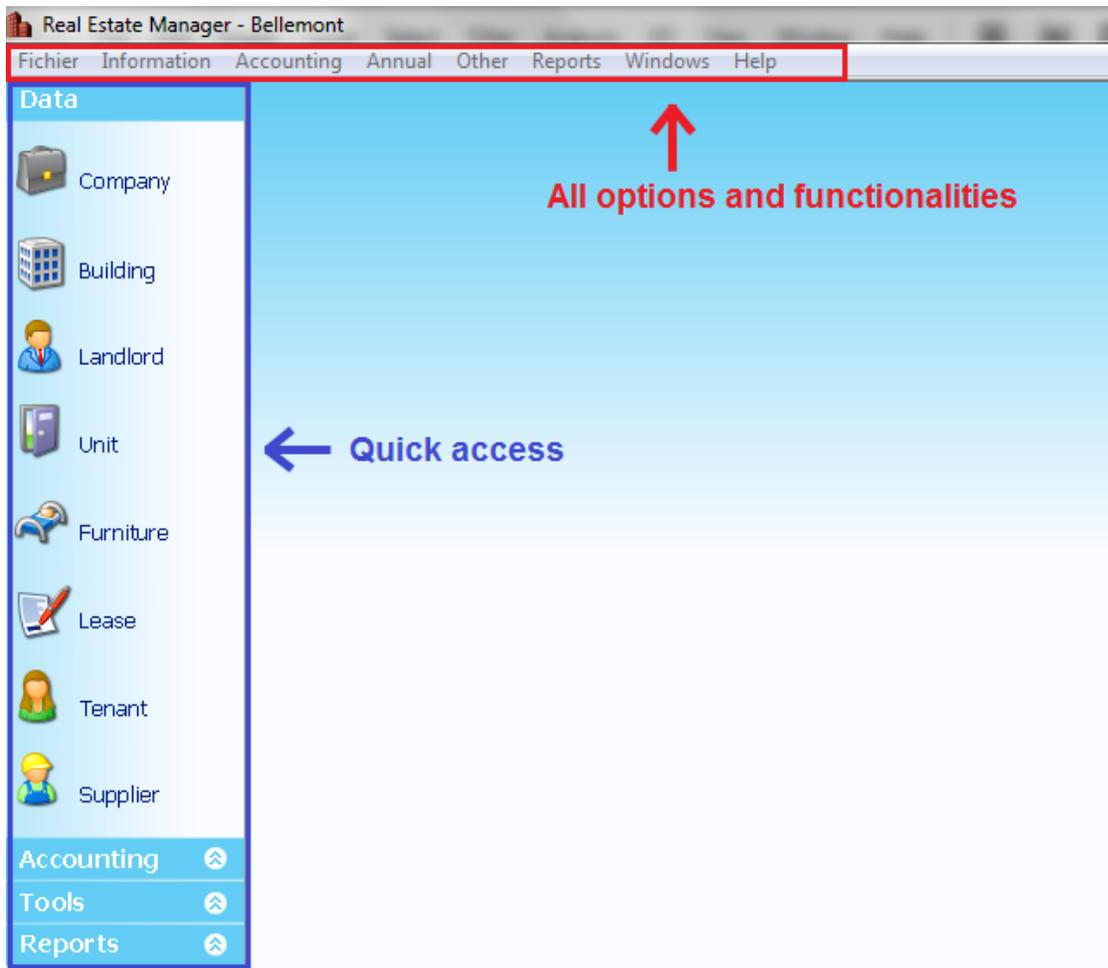
The above toolbar is visible in most of the windows. Here are some explanations:

Add	**Add an element (e.g. a company).**
Delete	**Delete an element (e.g. an apartment).**
Rename	**Modify the name of an element (e.g. a tenant).**
	Save all the information contained in the window.
Save and Close	**Save all the information contained in the window and close it.**
	Edit the window content according to the latest modifications.
	Cancel the last modifications.
	Choose and view the reports related to the window topic.
	Access the Help section related to the window topic. You can press the F1 key at any time to access directly this topic in the online Help section of Real Estate Manager.

1.3 Buttons

The following buttons will enable you to perform several other actions.
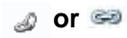
or	**Link and connect two elements together (e.g. a tenant with a lease).**
	View in details an element (e.g. the detail of a building).
	Add a specific element (e.g. an invoice item).
	Delete a specific element (e.g. a payment).
	Modify a specific element (e.g. a post-dated cheque).
	Save a specific element (e.g. account no.).
	Select a file on your computer.
	Select a supplier.
	Move the selected element with the up-down-left-right arrows.

1.4 Support and Help Resources

Several resources are at your disposal for you to understand and handle your property management tool.

1.4.1 Detailed procedures

The online technical support enables you to enter keywords, therefore giving you access to more than 200 procedures with step-by-step instructions on how to use the software. It is accessible in different ways:

» **Using an internet browser http://www.magextechnologies.com/en-CA/rem_support.aspx**

» **By pressing the F1 key on your keyboard**

» **By clicking on the Help icon** in each window

» **By clicking in the left menu on the Misc. tab, then the Online Support button**

Search procedure by keywords.

[   ] Search

1.4.2 Video tutorials

In the online support section, you also have access to more than twenty tutorials with step-by-step procedures showing how to use your new management software. Simply click on a thumbnail to view the tutorial.

Search support   Tutorials   Guides   Updates   Download

1.4.3 Customized trainings

The customized trainings content is designed to meet your specific needs and goals, according to your schedule and availability.

It is recommended to view the free tutorials and to familiarize with the software before attending a customized training during which you will broaden your knowledge.

There are two kinds of customized trainings: in person and via Internet.

To get information about the cost and terms and conditions of trainings or to set up an appointment, call 1 (866) 886-2439 or send us an e-mail at **info@MagexTechnologies.com**.

1.4.4 Group sessions

Group sessions follow a pre-determined plan according to the selected level. We will send you by e-mail information regarding the dates, locations and the cost of such trainings.

1.4.5 Accounting or management resource persons

Some customers wish to entrust to others inputs and data checks, while others are looking for mentors to guide them and assist them with their use of Real Estate Manager's management software.

To meet this need, we have contacted accounting and management professionals who have attended a Real Estate Manager training before obtaining their certification.

1.5 Logical structuring of the data

Your system is running and ready to operate but have you think about the way your data will be structured and organized? Here is a flowchart example featuring all possible situations. It could be that your structure already corresponds to one of them.
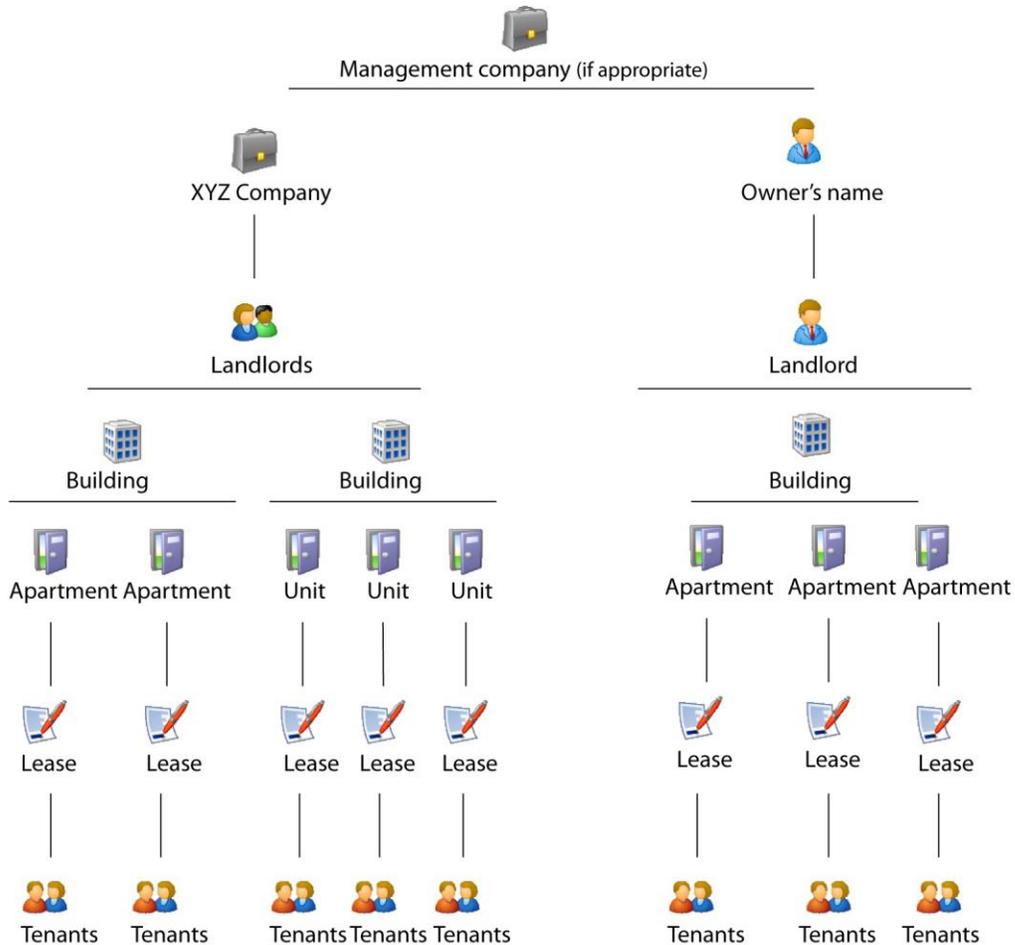
Personally-owned buildings will need all the same to be entered as a company to comply with the Real Estate Manager structure.

It is important to identify which one corresponds to yours so as to enter your data properly in Real Estate Manager and ensure they reflect the reality

2. Begin the input

You will find listed below elements to be entered and ranked in order. To get step-by-step procedures on how to enter these data, click on the link title and you will be directly redirected to the Help portal. Finally, it is best to enter your data only one company at a time.

2.1 Summary of steps to follow to enter information

Please note that the following summary has been established according to individual owners' needs and not for management companies.

1. **Create a company** (left menu, data, company)
2. **Create the landlords** (left menu, data, landlord)
3. **Create the buildings** (left menu, data, building)
4. **Link the buildings to the landlords** (top menu, data, link landlord-building)
5. **Create the rental units** (left menu, data, rental unit)
6. **Create the tenants** (left menu, data, tenant)
7. **Create the leases** (left menu, data, lease)
8. **Link the leases to the tenants** (top menu, data, link tenant-lease)
9. **Create the suppliers** (left menu, data, supplier)
10. **Perform a backup copy** (top menu, file, backup)

2.2 Summary of the steps to follow for the accounting

Please note that the following summary has been established according to owners' essential needs and not for management companies.

1. **Check the financial period** (top menu, annual, financial period)
2. **Create your bank accounts** (top menu, accounting, banking transactions, bank account)
3. **Link your bank accounts to the buildings** (idem)
4. **Create your credit cards** (top menu, accounting, credit card)
5. **Create your line of credit** (top menu, accounting, line of credit)
6. **Create your mortgages** (top menu, accounting, automatic mortgage)
7. **Enter post-dated cheques** (left menu, accounting, collection, tab PDC and PAP)
8. **Enter pre-authorized payments** (idem)
9. **Enter rents received in advance** (left menu, accounting, collection)
10. **Perform a backup copy** (top menu, file, backup)

2.3 Summary of the steps to follow for the rent collection

1. **Invoice your tenants** (left menu, accounting, invoicing, automatic invoicing)
2. **Print the report Rent Collection** (left menu, report, rent collection)
3. **Collect your tenants rent entirely or in part** (left menu, accounting, collection)
4. **Create deposit slips** (left menu, accounting, deposit slip)
5. **Manage the NSF cheques** (left menu, accounting, collection, track record)
6. **Perform a backup copy** (top menu, file, backup)

2.4 Summary of the steps to follow for the expenditures management

1. **Enter your expenditures** (left menu, accounting, expenditure)
2. **Make payments** (left menu, accounting, disbursement)
3. **Pay off credit cards** (left menu, accounting, disbursement, CC payment)
4. **Perform a backup copy** (top menu, file, backup)

2.5 Outline of other available functionalities

» **Manage your Régie's litigation cases** (left menu, various, litigation)
» **Manage your work** (left menu, misc., work)
» **Print reports of all software sections** (see each window)
» **Create security deposits** (top menu, accounting, security deposit)
» **Manage bad debts** (left menu, accounting, invoicing, track record)
» **Print the correspondence** (left menu, misc., letters & notices)
» **Calculate the rent increase** (top menu, annual, rent increase)
» **And much more!**

3. Prepare the system

Here are other ways to use your new software to its fullest potential.

3.1 Specifications of the parameters

There is a window *Parameters* accessible via the top menu, File.

You can scroll through the tabs one after the other to specify the kind of information to be displayed and how to do so, the nature of notices and reminders that you want to receive, their frequency and much more.
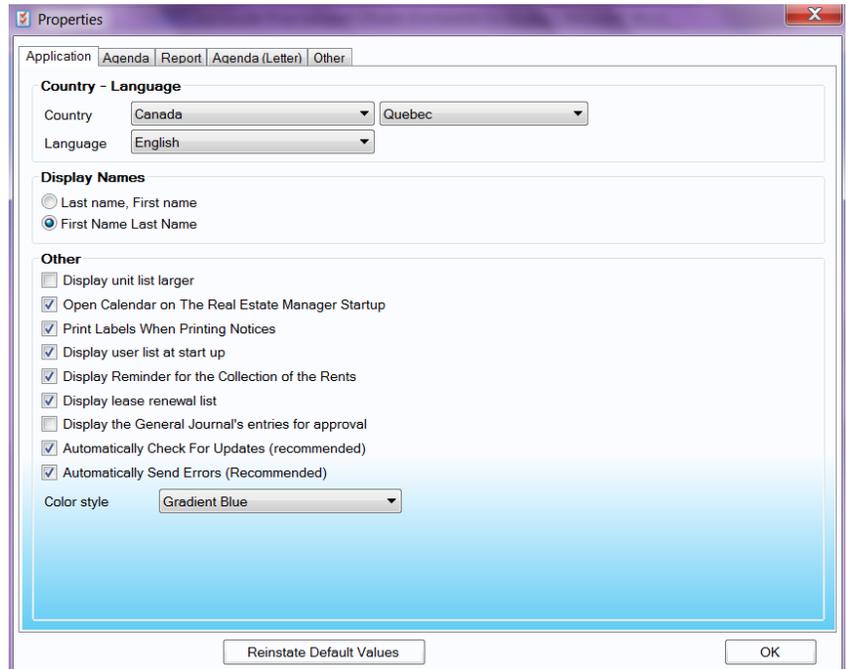
3.2 Specifications of the backup parameters

Another valuable parameter is the data backup. A backup copy is performed upon software opening and every hour, without you having to do anything whatsoever.

These backup copies are saved automatically in the following repertory:

For XP C:\Documents and Settings\All Users\Application Data\Magex
Technologies\ProprioExpert\Backup\Auto

For W7 C:\ProgramData\MagexTechnologies\ProprioExpert\Backup\Auto -

It will contain the 20 latest backup copies and the oldest ones will be automatically deleted.

It is strongly recommended to perform manual backup copies and to keep them in a safe place in the event of a fire, flood, theft or a material damage.

You will be able to save them on an external medium like a USB key, a server or another hard disk (backup copy) or transfer them to our secure servers via Internet (Data Transfer).

If you choose this free mode of transmission and hosting, please note that copies are kept for a 6-12 month period, according to file sizes transmitted online by our customers.

Use the keywords *Backup Copy* on the Technical Help portal to get more details on how to perform and restore these backup copies.
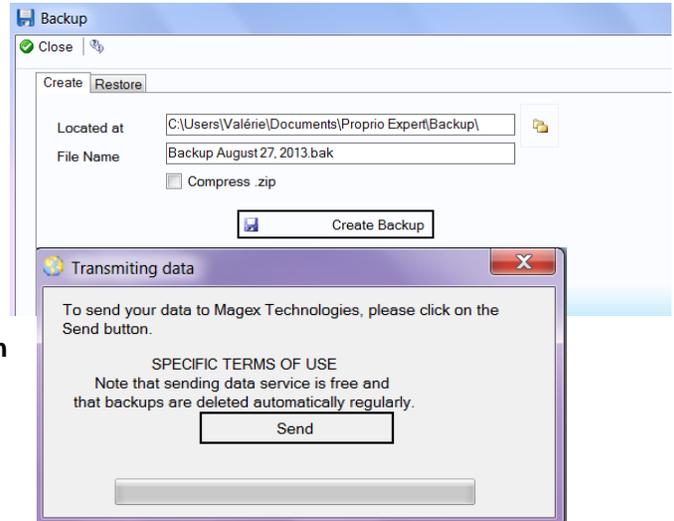
You are encouraged to refer to the resources at your disposal or to contact us at 1 (866) 886-2439.

We are constantly evolving for you, with you.

REAL ESTATE MANAGER TEAM
1 (866) 88-MAGEX
support@MagexTechnologies.com