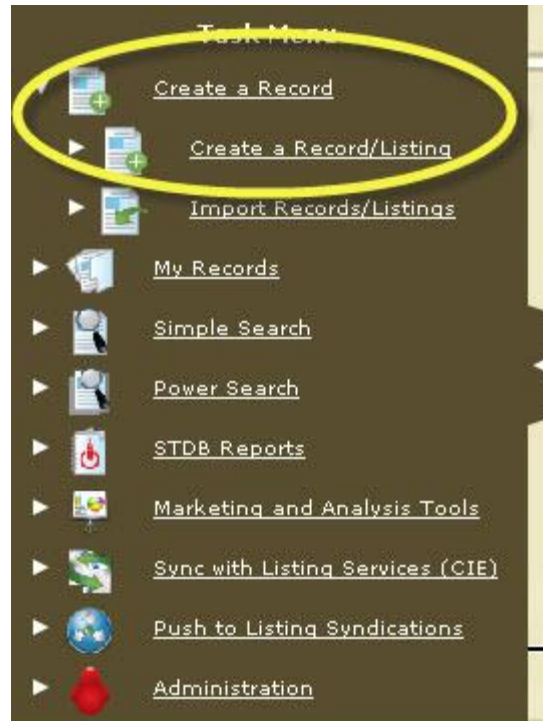


Create a Record Tutorial

The Create a Record feature allows users to create a new record by first entering an address or clicking on a map and then using a blank record template or if available, information from a matching record.

The step-by-step instructions below take you through the process of creating a record and using the various functions within Create a Record.

Step 1: Click 'Create a Record' located on the Task Menu. Select 'Create a Record/Listing' to create new records/listings.



The 'Create a Record' workflow will open at the top of the screen.

Find Property Address

Step 1

Step 2

Step 3 Examples: 85260

Step 4 Scottsdale, AZ
380 New York St, Redlands, CA

To Create a Record:
1. Input a specific address or a city, state or zip.
2. Click "Find".

Using the "Add Point on Map":
1. Click the button and then click the desired location on the map.
2. If the location is incorrect, click "Edit" on the balloon label.
3. Click "Save Address" to commit changes.

*Once point is acceptable, click right arrow to proceed.

Option 1: Enter an Address

Input a specific address with or without a street number or any standard geography to begin creating a record.

The following are acceptable address formats:

85260 (i.e. Zip Code)

Scottsdale, AZ

380 New York St, Redlands, CA

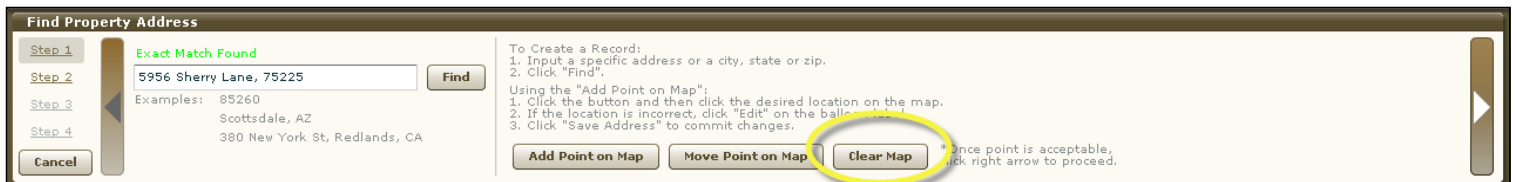
Click the 'Find' button.



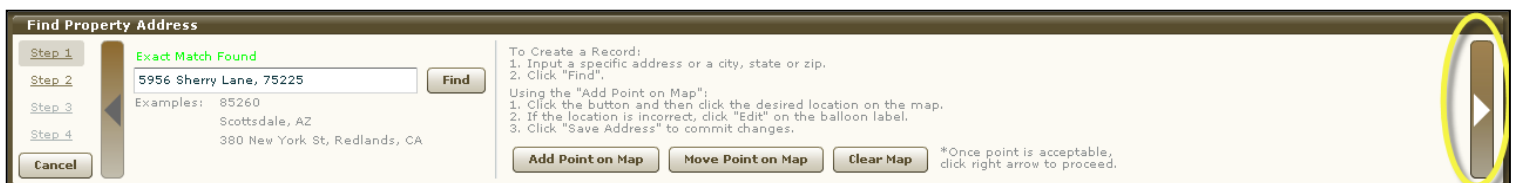
If the property location is not correct on the map, the user has the ability to move the balloon to the correct location. Simply click the balloon and move to the correct property location.

If multiple locations are found, choose the correct one you would like to proceed with.

If the user wants to clear the map and begin the process over, click the 'Clear Map' button.

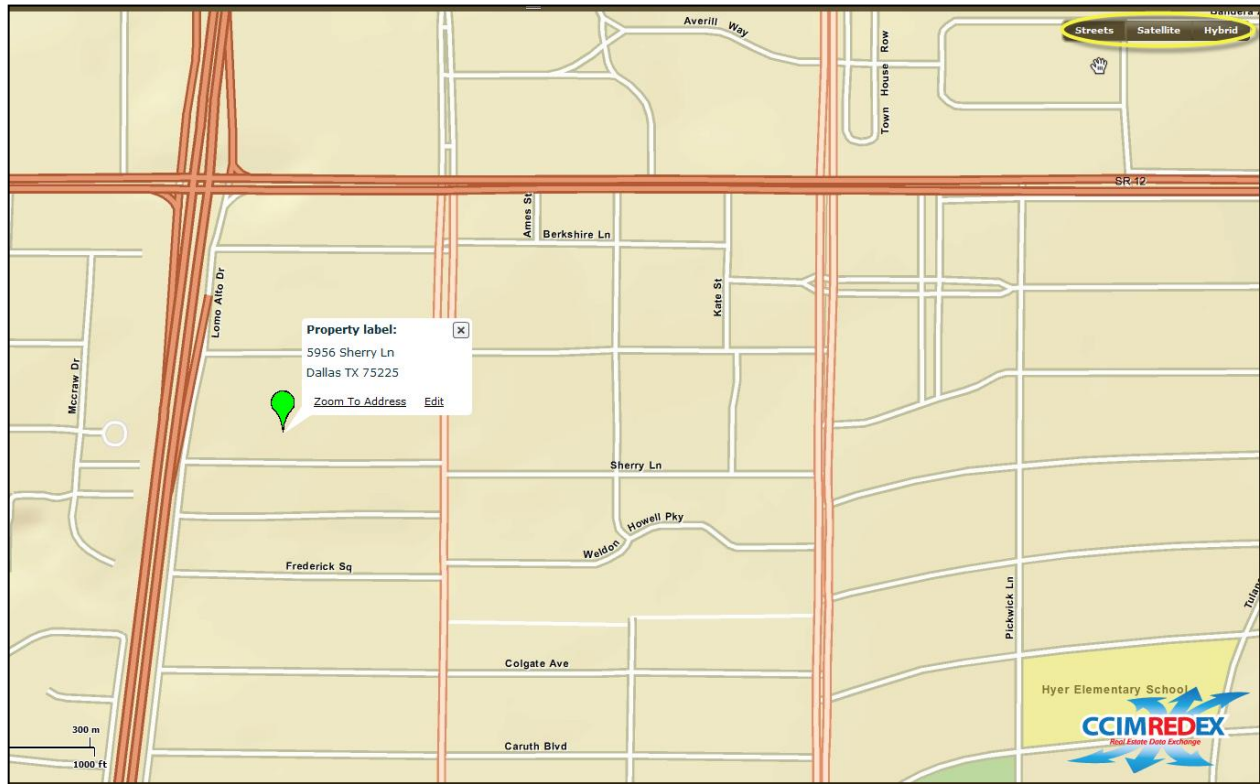


Once the desired address is located successfully on the map, click the arrow to the right of the workflow to proceed to the next step.

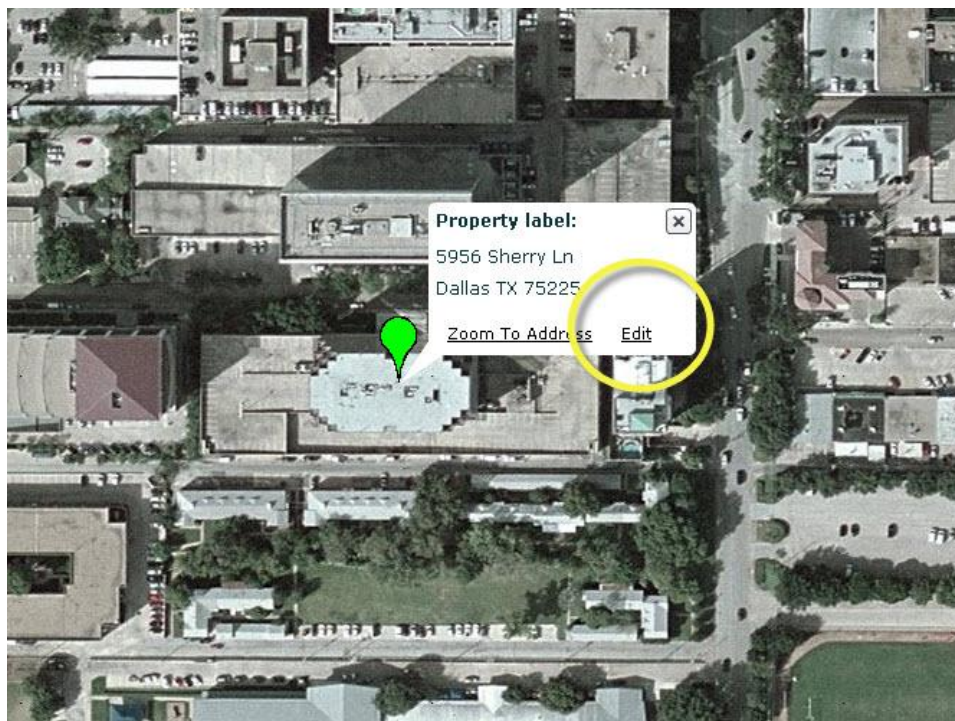


Option 2: Add Point on Map (Clicking Map)

This option is very useful for land that may be difficult to locate by address, or large parcels that contain multiple buildings. Click the 'Add Point on Map' button. The user will now see a red balloon with their mouse. Click the desired location of the property to place the balloon on the map. The balloon will turn green once the location has been found. For added accuracy, select Hybrid map type at the top right corner of the map.



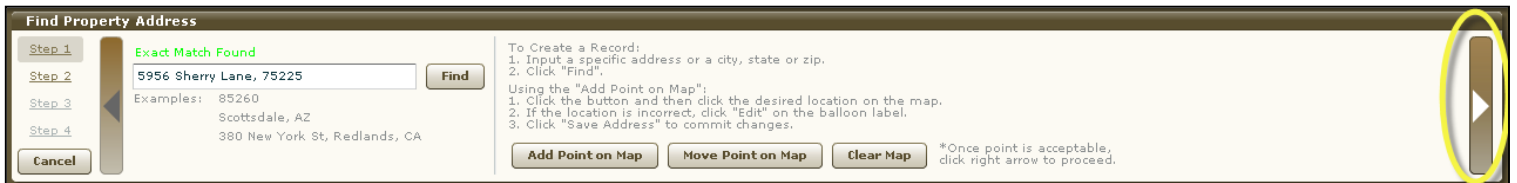
If the Property Label is incorrect, click the balloon and then click the 'Edit' button and type in the correct address.



If the user wants to clear the map and begin the process over, click the 'Clear Map' button.



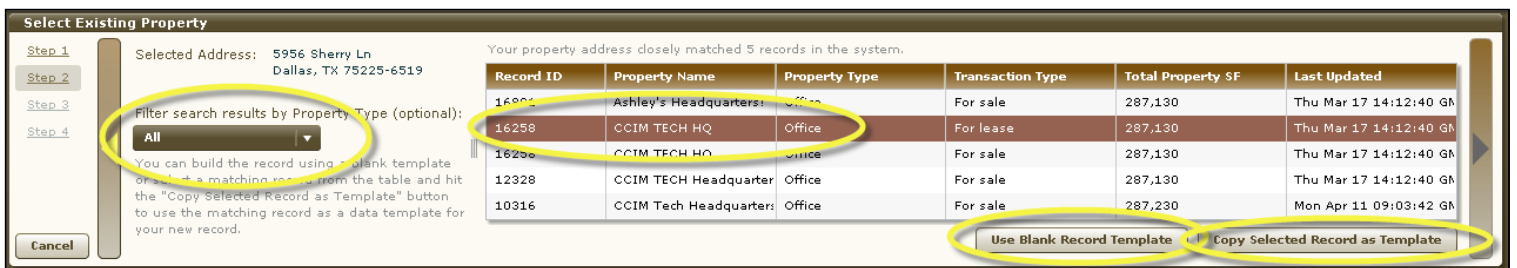
Once the desired address is located successfully on the map, click the arrow to the right of the workflow to proceed to the next step.



Step 2:

The user can build the record using a blank template or select a closely matched record from the table and press the 'Copy Selected Record as Template' button to use the matching record as a data template for your new record.

The user is also able to filter the search results by Property Type, if desired, by choosing the Property Type from the drop down menu.



Users can preview the full existing record or the record summary for closely matched records in the window located below the table.

Note: If you are not the owner of the record to be copied, the For Sale Listings, For Lease Listings, Property Financial Information, Sale History and Attachments will not be copied to the new record.

If the user chooses to create the record using a blank template, click the 'Use Blank Record template' button. The workflow will automatically move to the next step.

Step 3: The user must now enter the property details for the record. All required fields within CCIMREDEX are indicated by a red asterisk (*). Property Name, Property Description, Total Property Square Feet, Land Area and Property Type are all required fields in this step.

Enter Property Details

Step 1 Selected Address: 5956 Sherrv Ln Dallas, TX 75225-6519 Edit Address

Step 2

Step 3 Property Name * CCIMTECH HQ - Dallas

Property Description * Class A Office building located at NW Highway and the Dallas North Tollway.

Total Property SF * 15,000

Land Area * 2.00 Acres

Primary Contact: Ashley Sloan ashley@stdbonline.com (469) 232-2606

Property Type * Office

Click Save after entering (editing) the required information above to activate and enter information in the detail buckets below.

Cancel * required information Save

Click the 'Save' button after entering the required information.

Enter Property Details

Step 1 Selected Address: 5956 Sherrv Ln Dallas, TX 75225-6519 Edit Address

Step 2

Step 3 Property Name * CCIMTECH HQ - Dallas

Property Description * Class A Office building located at NW Highway and the Dallas North Tollway.

Total Property SF * 15,000

Land Area * 2.00 Acres

Primary Contact: Ashley Sloan ashley@stdbonline.com (469) 232-2606

Property Type * Office

Click Save after entering (editing) the required information above to activate and enter information in the detail buckets below.

Cancel * required information Save

After the Property Details are saved, the information buckets on the carousel below will activate. The user can now enter additional details/information about the record in the buckets.





Once you click on the **'Property Information'** bucket in the carousel below, the screen will open to enter additional details about the property. Click on the **'Property Additional Information (Continued)'** bar to continue entering additional property details. Once all information has been entered, click the **'Save'** button.

Property Information

Property Additional Information

Classifications

Property Sub-Type: Select one
Special Use Type: Select one
Building Quality Class: Select one

Construction

Status: Select one
Year Built:
Year Last Renovated:

Descriptions

Area Overview:
Overview Highlights:
Description 1:
Description 2:
Description 3:

Tenant

Occupancy %:
Unit Configuration: Select one
Anchor/Major 1:
Anchor/Major 2:
Anchor/Major 3:

LEED

Certification: Select one
Description:

Property Additional Information (Continued)

Clear Save Close



The primary contact for each record will be the **CCIMREDEX** user. If additional contacts are needed for the record, click the **'Contacts'** bucket to add them.

Manage Contacts

Existing Contacts

* First Name	Last Name	Email	Office Phone	Name	Company Phone
* Ashley	Sloan	ashley@stdbonline.com	(469) 232-2606	CCIMTECH	(469) 232-2606

* Denotes Primary Contact.

Add New Contact Edit Contact

Personal Information

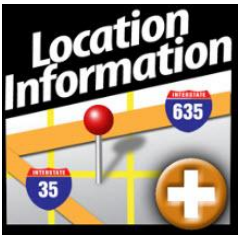
First Name * Ashley
Last Name * Sloan
Job Title
Salutation
Office Phone * (469) 232-2606
Mobile Phone
Email * ashley@stdbonline.com
Contact Type Agent/Broker
Professional Designation

Company Information

Name * CCIMTECH
Company Phone * (469) 232-2606
Company Address * 5956 Sherry Lane
City Name * Dallas
State Name * TX
ZipCode * 75225

Profile Image * Recommended Profile Image size is 70 width by 80 height. If image is larger it will be scaled down accordingly. Maximum allowed file upload size is 300 KB.

Close



Once you click the **'Location Information'** bucket in the carousel below, the screen will open to enter additional location information about the property. Once all information has been entered, click the **'Save'** button.

Property Location Information

TaxId/APN	<input type="text"/>	Location Description	<input type="text"/>
Complex Name	<input type="text"/>	Legal Description	<input type="text"/>
Building Name	<input type="text"/>	Market Description	<input type="text"/>
Building Number	<input type="text"/>	Plot	<input type="text"/>
Department	<input type="text"/>	Intersection	<input type="text"/>
Floor	<input type="text"/>	Zoning	<input type="text"/>
Room	<input type="text"/>		
MSA	Select one		
CBSA	Select one		

Real Property Tax Assessment Total	<input type="text" value="0"/>	Real Property Tax Assessment Improvements	<input type="text" value="0"/>
Real Property Tax Assessment Land	<input type="text" value="0"/>	Real Estate Taxes (Annual)	<input type="text" value="0"/>

Clear Save Close



Once you click the **'Financial Information'** bucket in the carousel below, the screen will open to enter financial information about the property. Once all information has been entered, click the **'Save'** button.

Financial Information

Annual operating data		Pro forma annual operating data	
Potential rental income	<input type="text"/>	Potential rental income	<input type="text" value="\$0.00"/>
Net operating income	<input type="text" value="\$0.00"/>	Net operating income	<input type="text" value="\$0.00"/>
Cap Rate (%)	<input type="text" value="0"/>	Cap Rate (%)	<input type="text" value="0"/>
Internal rate of return	<input type="text" value="0"/>	Internal rate of return	<input type="text" value="0"/>
Cash On Cash	<input type="text" value="0"/>	Cash On Cash	<input type="text" value="0"/>
Potential rental income remarks	<input type="text"/>	Potential rental income remarks	<input type="text"/>
NOI remarks	<input type="text"/>	NOI remarks	<input type="text"/>
Cap rate remarks	<input type="text"/>	Cap rate remarks	<input type="text"/>

Existing Financing		Description	<input type="text"/>
Loan Balance	<input type="text" value="\$0.00"/>		
Interest Rate	<input type="text" value="0"/>		
Amortization Period (Years)	<input type="text" value="0"/>		
Maturity Date	<input type="text"/>		
Assumable	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Unknown		

Other financial info	
Gross Rent Multiplier	<input type="text" value="0"/>

Clear Save Close

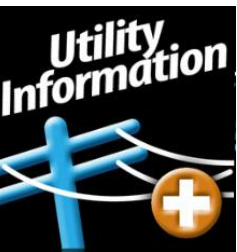


Once you click the **'Mechanical Information'** bucket in the carousel below, the screen will open to enter mechanical information about the property. Once all information has been entered, click the **'Save'** button.

The form is titled 'Property Mechanical Information' and is divided into four sections:

- Power:** Includes a 'Phase' dropdown menu (currently showing 'Select one'), and input fields for 'Volts' and 'Amps', both containing the number '0'.
- Air Conditioning:** Includes four checkboxes: 'Centralized', 'Heat Pump', 'Window', and 'None', all of which are currently unchecked.
- Heat Type:** Includes eight checkboxes: 'Convection', 'Electric', 'Forced Air', 'Gas', 'Metered Individually', and 'Solar', all of which are currently unchecked.
- Other:** Includes a text input field for 'Lighting System' and radio buttons for 'Has Sprinklers?' with options 'Yes', 'No', and 'Unknown'. The 'Unknown' option is selected.

At the bottom right of the form are three buttons: 'Clear', 'Save', and 'Close'. The 'Save' button is circled in yellow.



Once you click the **'Utility Information'** bucket in the carousel below, the screen will open to enter utility information about the property. Once all information has been entered, click the **'Save'** button.

The form is titled 'Property Utilities Information' and contains a section titled 'Available' with the following items:

- Water: Radio buttons for Yes, No, and Unknown. 'Unknown' is selected.
- Sewer: Radio buttons for Yes, No, and Unknown. 'Unknown' is selected.
- Electric: Radio buttons for Yes, No, and Unknown. 'Unknown' is selected.
- Cable: Radio buttons for Yes, No, and Unknown. 'Unknown' is selected.
- Fiber Optic: Radio buttons for Yes, No, and Unknown. 'Unknown' is selected.
- Public Water: Radio buttons for Yes, No, and Unknown. 'Unknown' is selected.
- Septic: Radio buttons for Yes, No, and Unknown. 'Unknown' is selected.

At the bottom of the form are three buttons: 'Clear', 'Save', and 'Close'. The 'Save' button is circled in yellow.



Once you click the **'Amenities'** bucket in the carousel below, the screen will open to enter amenities information about the property. Once all information has been entered, click the **'Save'** button.

Property Amenities

<input type="checkbox"/> A/C	<input type="checkbox"/> Air lines	<input type="checkbox"/> Alarm	<input type="checkbox"/> Atrium	<input type="checkbox"/> Balconies
<input type="checkbox"/> Basketball court	<input type="checkbox"/> Business center	<input type="checkbox"/> Buss ducts	<input type="checkbox"/> Cable/Satellite	<input type="checkbox"/> Ceiling fan
<input type="checkbox"/> Child care	<input type="checkbox"/> Commuter rail	<input type="checkbox"/> Conference facility	<input type="checkbox"/> Cooler	<input type="checkbox"/> Courtyard
<input type="checkbox"/> Covered park	<input type="checkbox"/> Day care	<input type="checkbox"/> Dishwasher	<input type="checkbox"/> Disposal	<input type="checkbox"/> Dry cleaner
<input type="checkbox"/> Dryer	<input type="checkbox"/> Empowerment zone	<input type="checkbox"/> Fenced lot	<input type="checkbox"/> Fireplace	<input type="checkbox"/> Fitness center
<input type="checkbox"/> Floor drains	<input type="checkbox"/> Food service	<input type="checkbox"/> Furnished	<input type="checkbox"/> Garage	<input type="checkbox"/> Gate
<input type="checkbox"/> High-speed Internet	<input type="checkbox"/> Jogging trail	<input type="checkbox"/> Large closets	<input type="checkbox"/> Laundry	<input type="checkbox"/> Mail room
<input type="checkbox"/> Metal halide	<input type="checkbox"/> Microwave	<input type="checkbox"/> Night patrol	<input type="checkbox"/> On-site management	<input type="checkbox"/> Other
<input type="checkbox"/> Patio	<input type="checkbox"/> Playground	<input type="checkbox"/> Pool	<input type="checkbox"/> Process gas	<input type="checkbox"/> Racquetball
<input type="checkbox"/> Raised floor	<input type="checkbox"/> Rooftop terrace	<input type="checkbox"/> Sauna	<input type="checkbox"/> Skylights	<input type="checkbox"/> Spa
<input type="checkbox"/> Storage space	<input type="checkbox"/> Subway	<input type="checkbox"/> Tennis court	<input type="checkbox"/> Volleyball court	<input type="checkbox"/> W/D hookup
<input type="checkbox"/> Washer/dryer in unit	<input type="checkbox"/> Wheelchair			

Buttons: Clear, **Save**, Close

Once all property details and additional information has been added for the record, click the arrow on the right of the workflow to continue to the next step.

Enter Property Details

Step 1 Selected Address: 5956 Sherry Ln, Dallas, TX 75225-6519 [Edit Address](#)

Step 2 Primary Contact: Ashley Sloan, ashley@stdbonline.com, (469) 232-2606

Step 3 Property Name: * CCIMTECH HQ - Dallas

Step 4 Property Description: * Class A Office building located at NW Highway and the Dallas North Tollway.

Property Type: * Office

Total Property SF: * 15,000

Land Area: * 2.00 [Acres](#)

* required information

Click Save after entering (editing) the required information above to activate and enter information in the detail buckets below.

Buttons: Cancel, Save

Step 4: What Do You Want To Do Next?

Additional Task with Selected Record(s)

Step 1 What do you want to do next?

Step 2

Step 3

Step 4

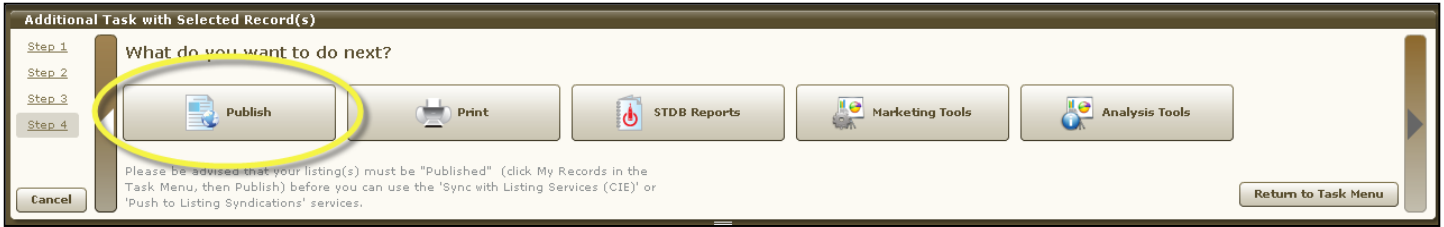
Buttons: Publish, Print, STDB Reports, Marketing Tools, Analysis Tools

Please be advised that your listing(s) must be "Published" (click My Records in the Task Menu, then Publish) before you can use the 'Sync with Listing Services (CIE)' or 'Push to Listing Syndications' services.

Buttons: Cancel, Return to Task Menu

The user has the option to move to other workflows, carrying the record(s) they just created with them. They now have the opportunity to:

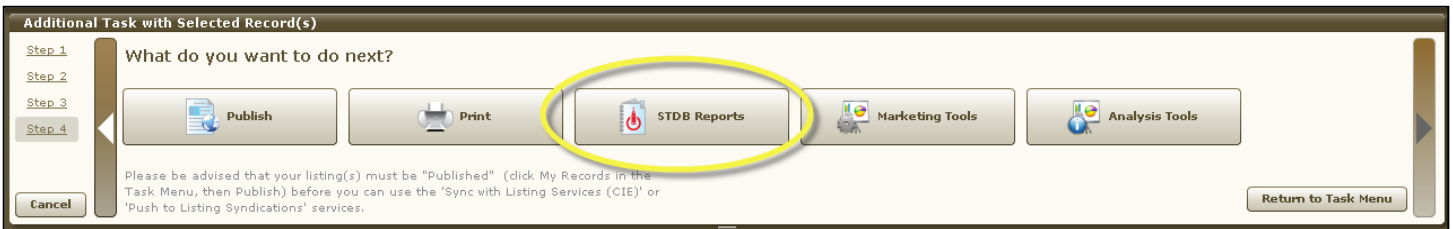
1. **Publish** the record(s) they recently created.



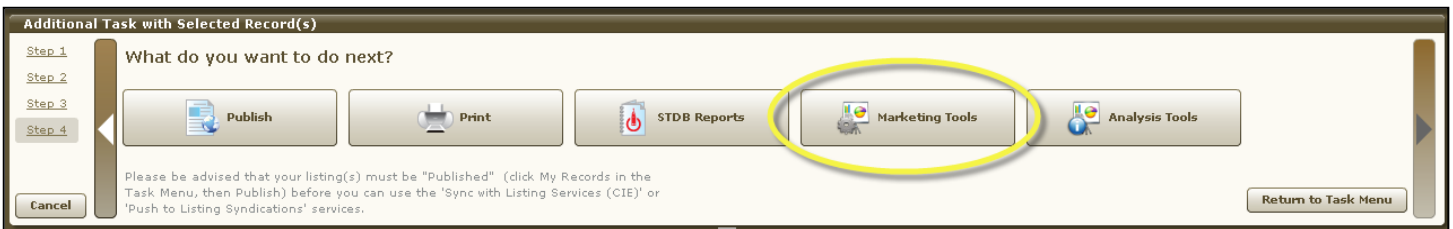
2. **Print** the record(s) they recently created.



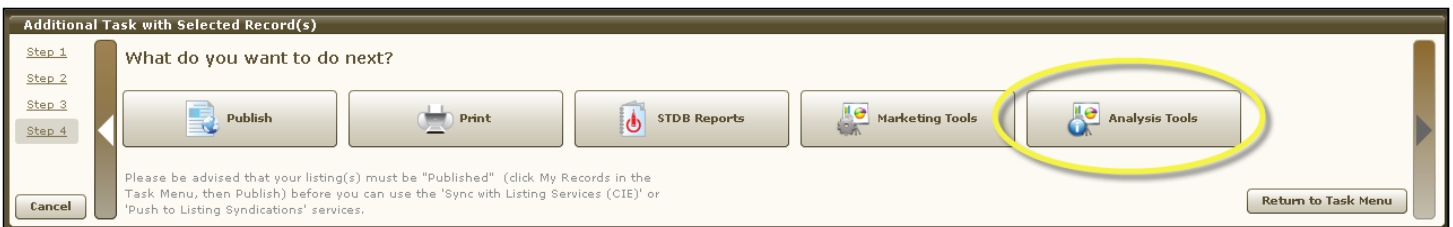
3. Run **STDB Reports** on the record(s) recently created.



4. Access **Marketing Tools** to create flyers, flash websites and more using the record(s) they just created.



5. Access **Analysis Tools** to complete an analysis on the record(s) they just created.



If the user does not want to continue to a new workflow with one of the options listed above, they can click the *'Return to Task Menu'* button and be taken back to the CCIMREDEX home screen.

Additional Task with Selected Record(s)

Step 1
Step 2
Step 3
Step 4

What do you want to do next?

Publish **Print** **STDB Reports** **Marketing Tools** **Analysis Tools**

Please be advised that your listing(s) must be "Published" (click My Records in the Task Menu, then Publish) before you can use the 'Sync with Listing Services (CIE)' or 'Push to Listing Syndications' services.

Cancel **Return to Task Menu**