KingsleySurveys

Property Management Data

From the Admin Portal, those with permissions will be able to manage their company's property data within KingsleySurveys.

To access **Property Management Data**, you must be set up with permissions as a Survey Admin. Please submit a request to your Project Manager or Account Manager for them to add the **Survey Admin** access to your account.

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Accessing the Survey Admin Portal

Follow the below instructions to access the KingsleySurveys Admin Portal.

1. Log in to the KingsleySurveys Portal, then select the 🔲 **Survey Admin Portal** link in the top right-hand corner of the screen.

2. You'll land on the Survey Admin Portal homepage where tiles will display depending on your access.

   o Click the ⤺ **Kingsley Portal** link to return to the KingsleySurveys Dashboard.

   o If you need assistance from our Support Team, click the ⓘ **Support Request** link to fill out a form. Or call (866) 472-2344 from 8:30am – 5:30pm ET Monday through Friday.

   o Click on your email address in the top right-hand corner of the screen to be navigated to your Manage Account page where you can change your password for the KingsleySurveys Portal.

   o Hover over the blue avatar in the top right-hand corner of the screen to be signed out of the portal by selecting the Log out option that displays.

   o All Survey Admin users will have access to the **Property Data Management** tile where you can add and edit user information, as well as grant access levels to users.
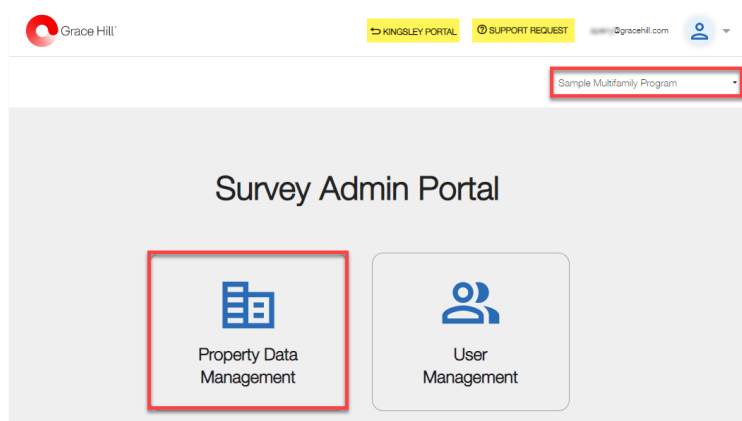
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Property Data Management Dashboard

3. From the **Survey Admin Portal**, select the **Property Data Management** tile to be directed to a listing of all properties currently in the KingsleySurveys portal to include the property name, status, address, city, state, and property type. From here you can:

- o Select and toggle between the program option(s) you have available from the drop-down menu provided in the top right-hand corner of the screen.

- o View total number of active and inactive properties, as well as how many properties are in pending review and rejected statuses. For more information on each status, see below:

  - ▪ **Total Active Properties:** Displays the total number of active properties in the system.

  - ▪ **Properties Pending Review:** This status will display the number of properties submitted to be added to the system but is awaiting review from the KingsleySurveys Team before being added as an active property or rejected to require review from an admin.

  - ▪ **Inactive Properties:** Displays the total number of inactive properties in the system.

  - ▪ **Rejected Properties:** This status will display the number of properties that have been rejected by the KingsleySurveys Team after being submitted for review.

- o Use the **Search** field to locate a specific property or status. As you type, a listing of applicable properties will be listed.

- o Select a column header to sort the column in ascending or descending order.

- o Scroll through the listing of properties with your mouse or use the scrollbar on the right.

- o To return to the admin portal homepage, in the breadcrumb trail at the top-left corner, click the Survey Admin Portal link.

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Add a Property

Follow the below instructions to request a new property be added to the KingsleySurveys system. Once submitted, the information will be reviewed by the KingsleySurveys Team. If you are a Survey Admin for more than one program, ensure the appropriate program is selected in the drop-down menu provided at the top of the screen before proceeding.

4. From the **Property Data Management** homepage, click the **+ Property** button.

5. The **Add Property** pop-up window will appear. From here, complete the below:

   o Enter the **Property Name**, Property Code *(optional)*, **Address**, **City**, **Country**, **Postal Code**, **Property Class**, **Renovation Status**, **Market Type**, Onsite Parking (Y/N), Elevators (Y/N), and the **Property Type** for the new property. Fields with an asterisk are required.

   > 🛈 *All Multifamily options will require the # of Units, Occupant Type, and Rent Type. All other options for Commercial will require information for the Square Footage.*

   o To add another new property, click the **+ Add Another Property** button and fill in the needed information. Repeat this step until all of your properties have been added.

   o After entering the information for the new property(s), click the **Review** button.

6. You'll be navigated to the **Review New Properties** page with a listing of the new properties you entered information for. *The next step is to submit the properties for review, if you navigate away from the page before completing the following step, the information will not be saved.*

7. If you need to edit a property's information, select the Property Name, then click the ✎ **edit icon** to open the fields for editing.

8. Once you've added all properties, click the **Submit New Properties** button.

   o A confirmation pop-up message will appear stating, *"Are you ready to send these properties?"*. Click **Yes** to proceed. Or click on the X to close out the message and not proceed with submitting the property(s).

   o After clicking Yes, you'll receive another confirmation message stating, *"All Properties Submitted!"*.

   > ⚠️ *At this time, please limit the number of new properties that are submitted to under 10 at one time. If you have more properties to add, please either break up the submissions or complete the spreadsheet to be requested to your Project Manager for upload.*

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Add a Property *(continued)*

- A Confirmation pop-up window will appear stating, *"All Properties Submitted!"*.

- You'll also receive a confirmation email that your property(s) was successfully submitted.

9. After a property(s) have been submitted, the information will need to be reviewed by the KingsleySuveys Team before being approved to be added to the system or rejected.

10. When a property(s) is submitted for review, the number of properties in review will be reflected on the Property Data Management homepage in the **Properties Pending Review** section.

11. The admin that submitted the property(s) will receive an email notification once the information has been reviewed by the KingsleySurveys Team with an approval or rejected status. If the property(s) were rejected, a comment will be provided with more details.

12. When properties are approved, the status will change to Active on the Property Data Management homepage and the **Total Active Properties** count will go up.

- If **rejected**, the property status will reflect as Rejected and the Rejected Properties count will go up. Review each rejected property and adjust the information as needed to then resubmit for review to the KingsleySurveys Team.

- After the property(s) has been approved, you'll need to add the property(s) to a Level/Group. Visit the [Assign/Unassign Properties to Levels/Groups](#) section of this guide.

ⓘ *If you have an API with Kingsley, ensure that the property(s) is also added to the PMS API feed.*

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Assign/Unassign Properties to Levels/Groups

To assign or unassign properties to a Level or Group, follow the below steps. If you are a Survey Admin for more than one program, ensure the appropriate program is selected in the drop-down menu provided at the top of the screen before proceeding.

13. From the **Property Data Management** homepage, click the ✿ **Manage Levels/Groups** button.

14. You'll be navigated to the Property Level Management page.

15. To assign a property(s), select the needed checkbox(es) in the **Properties** column on the left.

    o   Use the Search field to locate properties in the left column to be assigned to a Level/Group.

16. Then, in the **Levels/Group** column on the right, select and highlight the Level Value to assign the property(s) to.

    o   Use the Search field to locate the Level Value needed for the Level/Group.

17. To remove a property, select the **X** in the Levels/Group column, to move it over to the Properties column.

18. Once a property and Level Value is selected, the **Assign >>** button will become active. Click to move the selected property(s) over to the Level Value.

19. Click **Save Changes**.

20. A Confirmation pop-up window will appear stating, *"Are you sure you want to save the changes you've made?"*. Click **Yes** to proceed. Or click outside of the window to return to the Property Level Management page without saving changes.

    o   When clicking Yes, another message will appear stating, *"Levels saved successfully!"*. Click **OK**.

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Edit Property Information

To edit property information, follow the below steps. If you are a Survey Admin for more than one program, ensure the appropriate program is selected in the drop-down menu provided at the top of the screen before proceeding.

1. From the **Property Data Management** homepage, find the property you'd like to edit and on the property name.

2. The property details will appear. Click the ✏ **edit icon** to open the fields for editing.

3. Edit or add property information in the fields for **Property Name**, Property Code *(optional)*, **Status**, **Address**, **Property Class**, **Renovation Status**, **Market Type**, **# of Units**, **Occupant Type**, and **Rent Type**. Fields with an asterisk are required.

   > ℹ *If the Status is changes from Active to Inactive, once changes are saved, the property cannot be reactivated. To reactivate a property, a Support Request would need to be submitted.*

4. Click **Save Updates** to save any changes to the property data.