

Estateman system
Michael Staniland, Estates Manager
Yorkshire Building Society

‘We have the Estateman for Windows system, including the Rent Receivable, Service Charging, Valuation and Diary modules. The system has been in place for approximately eight years. Before that we had the Dos version of Estateman which was in place for a similar period.

The system records all our property information, including details about the properties themselves, plus landlord and tenant information. It also monitors rental income, helps with the management of service charges and assists with our annual property valuations. We use it to generate rent invoices and to record rents receivable, but overall we don’t make very much use of the financial side of the system as we have a central company financial system.

Our financial system and a range of other systems are frequently changed or upgraded. If Estateman interfaced with those systems, we would have to regularly upgrade the interface, so we have decided to keep Estateman as a standalone system.

Estateman has a comprehensive range of standard reports which include rental lists, tenant lists, and inspection dates. The inspection dates report is particularly useful as it ensures that properties are routinely inspected. Although there is a separate Reporting module available from Estateman, we have found that the standard reports meet our needs.

We did have some bespoke work done about five years ago when we needed both a Valuation and a Service Charge module to add to the system. We deal with valuations and service charges differently from many other users, so we had some input into the way Estateman developed these modules and they have been very useful.

We currently have approximately 150 properties, sixty per cent of which are owned by us, with the rest being leased. The properties are predominantly retail branches, often with offices and flats above which we rent out separately. Our portfolio has been fairly static in recent years with only a handful of branch relocations annually.

We have three regular users of the system, two of whom are surveyors and one who is an accounts administrator. The system was chosen because of its ease of use and value for money. It was easy to learn the basics in a couple of days.

The Estateman company is of a size which enables them to provide a more personal service. If we have any queries we are usually able to speak to a specific individual who has intimate knowledge of our system and the customisation which has been added over the years. We are very happy with our choice of system. It meets our needs and gives us the scope to further develop our use of the system in the future should we need to do so.’