Estate Master
DM & CC Certification Course
Level 1

Course Description

The Estate Master DM+CC Certification Course (Level 1) is a one day course where the full integration of the Estate Master Property Development Suite will be explored. The focus will be on the software features and functions of Estate Master Development Management (DM) and Corporate Consolidation (CC).

This course is designed to use practical industry examples to demonstrate the ability of Estate Master DM to record actual cash flows (using integration with corporate accounting systems), track current forecasts against previously agreed forecasts, reforecast future cash flows and then update key financial performance indicators across the life of the project.

Using Estate Master CC, participants will explore setting up development portfolios comprising of multiple project cash flows, discover how to apply portfolio-level financing, and generate the various reports available for consolidation and comparative analysis.

Best practice use of the Estate Master Property Development suite will be taught through the integration of the Estate Master Development Feasibility (DF), Development Management (DM) and Corporate Consolidation (CC) software.

Participants will be provided with hands-on software training using case studies to put the theory learnt into practice. All case studies must be completed and corrected to achieve the Estate Master DM+CC Certification.

Duration

1- Day (9:00am to 5:00pm)

Location

Various Computer Training Facilities.

Course Prerequisites

Estate Master DF Certification (Level 1)

Requirements

- Pen and Notepad
- USB Flash Drive

PC's and course material are provided.

Objectives

The objective of this course is to provide participants with the knowledge to:

1. Enter data and understand the basics of the Estate Master DM inputs and preferences.
2. Interpret the results that the software provides.
3. Efficiently manage and track a live project, and compare current forecasts against previous forecasts.
4. Understand of the importance of budget management and cash flow reporting for live projects.
5. Export, store and compare multiple Estate Master DM cash flow models in the Enterprise Database.
6. Consolidate cash flows across all company projects and generate multiple reports using Estate Master CC.
7. Use portfolio financing to fund consolidated projects.
8. Implement best practice use of the Estate Master Property Development Suite (DF, DM and CC).

The end achievement is an industry-recognised accreditation using the Estate Master DM and CC software.

Recommended Participants

This course is recommended for anyone who will need to use the Estate Master DM software or interpret its results, such as:

- Development Managers, who need to manage the forecasted costs and revenues of a project and report on its performance.
- Project Managers, who need to manage the overall performance of a project and its deliverability.
- Accountants and Financial Controllers, who manage the actual income and expenditure for a project and liaise with Development Managers to review the project's budgets and forecasts.
- Financiers and Investors, who are providing debt or equity funding for development projects.

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Agenda

Time	Session	Details
9:00 am – 9:15 am	Introduction	
9:15 am – 10:15 am	Session 1 – Introduction to Estate Master DM	• Demonstration of the basic functions of Estate Master DM, including step by step guide on data entry, setting of preferences and cash flow reporting / management. • Entering of case study data, including demonstration of workings of the model and how to interpret results. • Demonstrating the different approaches to inputting data for an original budget.
10:15 am – 10:30 am	Morning Tea	
10:30 am – 12:30 pm	Session 2 - Estate Maste DM Case Study 1	• Importing a case study from the Estate Master Development Feasibility (DF) software. • Setting the Original budget. • Making adjustments to set a Project budget. • Review of reforecasting modes and which one should be used. • Updating the cash flow forecasts with actuals. • Rolling forward and back, and its effects on the cash flow.
12:30 pm – 1:00 pm	Lunch	
1:00 pm – 2:00 pm	Session 3 – Estate Master DM Case Study 2	• Importing a case study from the Estate Master Development Feasibility (DF) software. • Setting different reforecasting mode for costs. • Importing actuals from your accounts data. • Understanding the financial reporting. • Reporting accruals and committed funds. • Tracking movement of inventory through the stock summary.
2:00 pm – 3:00 pm	Session 4 – Introduction to Estate Master CC	• Demonstration of the basic functions of Estate Master CC, such as data management, reporting and filtering. • Integration between DF, DM and CC and best practice use. • Step by step guide on setting up Projects and Portfolios. and the amalgamation of multiple cash flows. • Editing the reporting preferences and analysing the results.
3:00 pm – 3:15 pm	Afternoon Tea	
3:15 pm – 5:00 pm	Session 3 – Estate Master CC Case Study	• Looking at the different ways of creating a Portfolio. • Set up the different portfolio financing preferences. • Exporting Estate Master DF feasibilities to CC. • Exporting Estate Master DM monthly project cash flows to CC. • Reporting on the information stored within CC.

Note: With corporate courses, we do have the flexibility to tailor the agenda to focus on areas that are more beneficial to your business.