



ERP Upload Checklist

- Personnel
 - Property Owner/s
 - Property Management Company
 - Property managers
 - Maintenance Managers
 - Techs
 - Tenants
 - Security Service
 - Electrician, Plumber, HVAC
 - Elevator
 - Computer/IT
 - Phones
 - Fire/Ems
- Documents
 - Emergency Protocols To Follow
 - Floorplans
 - Evacuation plans
 - W9
 - Certificates of Insurance
 - Insurance policies
 - ERP Work Agreements
 - Pricing Schedule
 - Phone Tree/Communication Log
- Properties
 - Location
 - General Descriptions
 - Type
 - Size
 - Floors
 - Square footage
 - General Access
 - Access Points
 - Elevators
 - Knox Boxes
 - Sprinkler system and shutoff locations
 - Utility Shut offs
 - Known hazards
 - 3D Rendering (Matterport)