

ProLease Manual

WARNING, WARNING, WARNING - This manual is the most important document you can possibly read before starting to use ProLease. Especially if you are the person entering data. Commercial real estate is very complex. You are going to have properties where the amount of space you have will expand or contract, the term will be extended or shortened, you will have options to renew, cancel, expand, contract or purchase, you will have critical dates you need to be alerted to, some properties will have subtenants, some properties will have multiple primary uses, some properties will have multiple pieces of space at different \$ amounts, some locations will renew, some will relocate, you will have recurring expenses and one-time expenses, you will have properties in different currencies, you will want to track documents, many screens may affect your straight-line rent (GAAP) calculations etc. or the new lease accounting guidelines (capitalization of both Operating & Finance leases) and that is just to name a few scenarios. The worst thing you can do is to jump into ProLease without reading this document thinking you know how to enter all these scenarios. If you do not read this manual before starting to enter data I can promise you that you will enter some properties only to find out sometime later on down the road that you have entered them incorrectly and you now have to go back and re-enter them a different way.

This manual was designed to prevent that from happening. It was designed to introduce you to what you really need to know to use ProLease. How to look at a lease and break down the different clauses and possibly different pieces of space and enter it into ProLease. Our tech support line is always available to help you out but you will enjoy using ProLease much more if you read this document and understand a few basic concepts of ProLease. Even though the document is a lot of pages, it is very easy reading because most of the document is screen shots and a minimal amount of text. **DON'T LET THE TOTAL NUMBER OF PAGES SCARE YOU AWAY.** This document has more pictures in it than a Dr. Seuss book.

We also offer a 3 hour "User" training session that will walk you through ProLease from A – Z. There is a cost for this training session. Call us at 516-484-8080 to get details on all the training sessions we offer.

We thank you for choosing ProLease and we are excited to be working with you.

The ProLease Team



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WHAT IS PROLEASE?

ProLease is a lease administration database that tracks both real estate and equipment leases. Our typical client is any company that has a portfolio of office, industrial or retail locations (leased or owned) and / or a portfolio of equipment leases that they need to keep track of. Whether you have 10 leases or 4,000 leases, ProLease is the tool you want to use to track all of your real estate and equipment leases.

ProLease was written for tenants / Lessees (NOT landlords / lessors). This is a very important distinction. Using real estate as an example, when you are a tenant, you are one tenant with multiple locations. When you are a landlord, you are one location with multiple tenants. Inherently, the way tenants and landlords look at data is 180 degrees different. ProLease was written for tenants / Lessees, NOT landlords / lessors.

That being said, from a real estate perspective, when you are a tenant, you may have owned properties as well as leased properties. ProLease can handle both leased & owned properties in the real estate module. In addition, you may have subtenants (companies paying you rent) in either your leased or owned properties. ProLease can handle this as well.

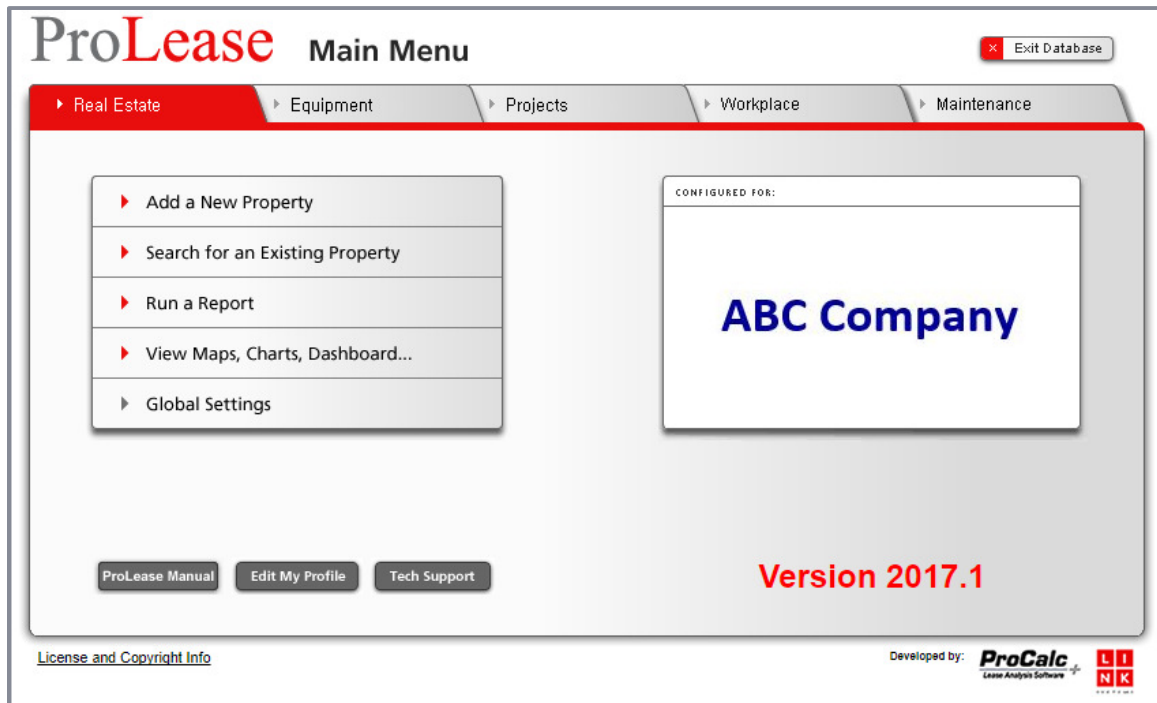
I know, I know, I know, you are all probably saying, “But Alan...in an owned property, they are not a subtenant, they are a tenant”. Technically you are correct. However, in ProLease, anybody that pays you rent is a subtenant. If you sublet / leased a 3rd party tenant 5,000 SF of your space, it does not make a difference if the property is a leased or owned property, the deal you make with the subtenant is the same. There is Base Rent, Operating, Real Estate Taxes, Utilities, Parking costs etc. Hence, to simplify this process, anytime you rent space to a 3rd party, regardless of whether it is a leased or an owned property, the 3rd party tenant will have the same set of data entry screens.

IMPORTANT – In the ProLease real estate module, any company that pays you rent, regardless of whether they are in a leased or owned property is considered a subtenant.

When you run reports on your subtenant income, you can filter the report to show either:

- Only include subtenants in “leased” properties
- Only include subtenants in “owned” properties
- Include all subtenants

PROLEASE MODULES



The entire ProLease application consists of five different modules. All the modules can be purchased simultaneously or individually. The five ProLease modules are:

- Real Estate Module – Tracks real estate leases & owned properties
- Equipment Module – Tracks equipment leases
- Projects Module – Allows the user to create and track a project
- Workplace Module – Tracks Floor Plans, Space & Personnel
- Maintenance Module – Work Order Tickets and preventative Maintenance Schedules

As you can see, each module serves a different purpose.

ProLease is also extremely strong on the lease accounting side. Whether it is FASB 13 (Straight Line Rent calculations) or FASB (ASU 842) or IASB (IFRS 16) ProLease is the program you want to be using.

LOGGING INTO PROLEASE

To log into ProLease, go to the following site:

[HTTPS://WWW.PROLEASEWEB.COM](https://www.proleaseweb.com)

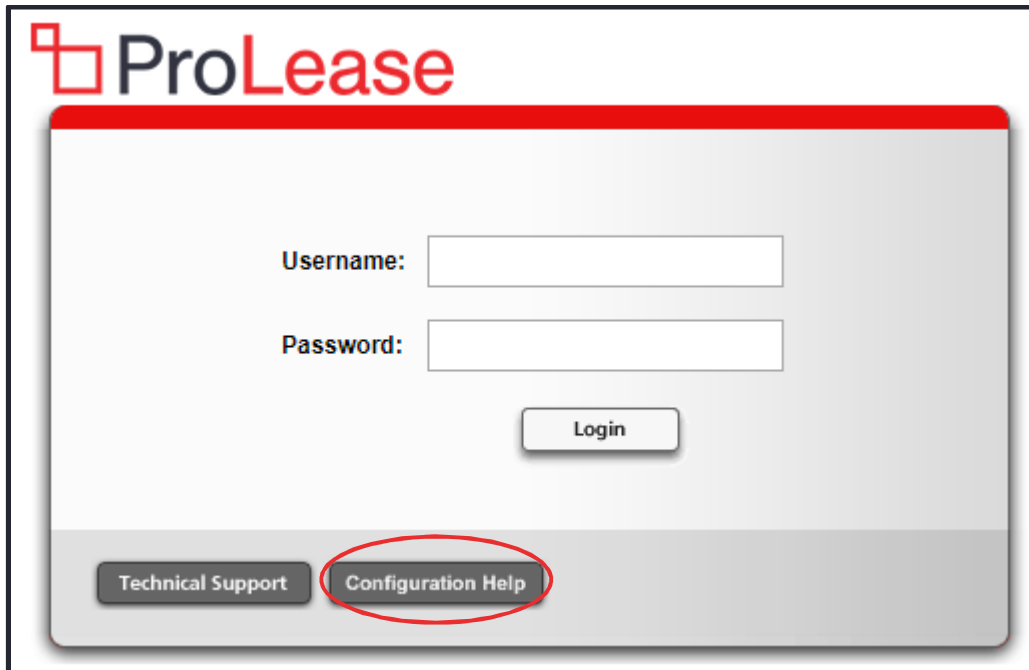
SETTING UP YOUR BROWSER TO WORK WITH PROLEASE

You must configure your browser to work with ProLease. ProLease will work with either:

- Google Chrome (recommended)
- Internet Explorer (version 8 or higher)
- Safari (version 5 or higher)

This means that you can access ProLease from almost any device that supports these browsers including PC's, Macs, iPads, Android Tablets and many smartphones.

To get instructions on how to set up your browser, when you go to the ProLease site listed above you will be at the following screen:



Click on the button labeled “Configuration Help”. This will launch a PDF document that has extremely user-friendly, easy to follow instructions on how to set up all the

browsers to work with ProLease. If you have any difficulty, please call our tech support line at 877-221-0229 or e-mail us at support@prolease.com

IMPORTANT – Do not be fooled. ProLease will (for the most part) work if you have not configured your browser up to work with ProLease however, certain parts of ProLease will not work. This includes screens looking awkward and being able to export reports to Excel.

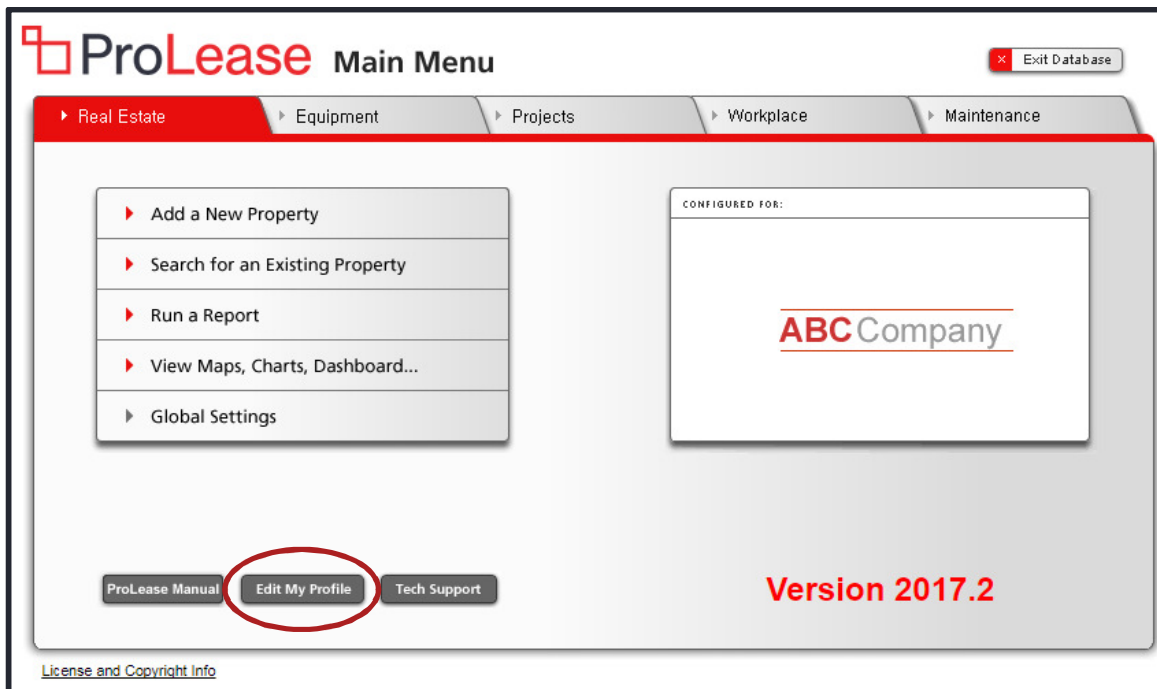
MY PROFILE SETTINGS

Changing my Username & Password? / What screen do I boot up to?

Each user can change:

- Their Username & Password
- Set the start-up screen
- Opt out of e-mails if they choose about server maintenance
- Select a different color pattern

From the ProLease Main Menu, click on the button labeled “Edit My Profile”



You will now be looking at the following screen:

My Profile

To change your username, please ask your administrator.

E-Mail*

Get maintenance emails? yes Get marketing emails? yes

Show this screen on startup*

Outer Background Color* Inner Background Color*

First Name*

Last Name*

Company*

Configuring Your Windows Font Size

We have spent an incredible amount of time designing each screen so that we can convey all that information in an easy to understand format, that looks great. As you will see when you start using ProLease, space on each screen is at a premium. Commercial real estate requires a lot of data!

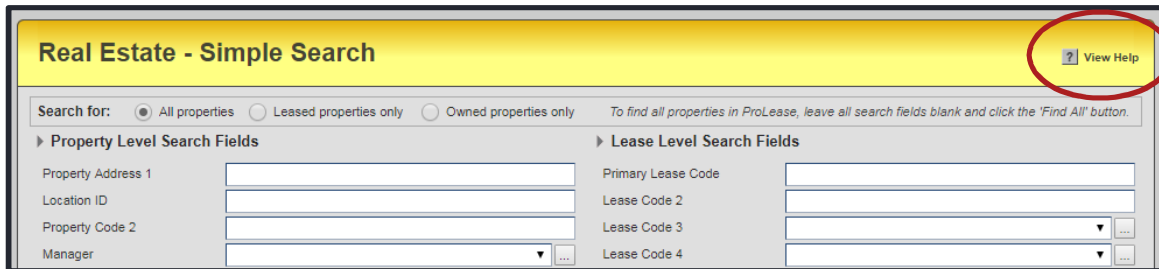
If your screen is looking strange and you are missing fields and labels are not lining up with boxes, it is probably due to your computer font size (Windows Setting). Your computer font must be set to "Normal" size. If your fonts are anything larger than normal, this will cause the ProLease screens to look out of alignment.

GETTING HELP

When you are on any screen in ProLease, there are two ways you can get ProLease help.

1) View Help

In the upper right corner of every data entry screen there is a “View Help” button. Click on this help button and it will bring up a PDF document that will tell you everything you need to know about that screen.




The screenshot shows the 'Real Estate - Simple Search' interface. At the top, there is a yellow header bar with the title 'Real Estate - Simple Search' and a 'View Help' button circled in red. Below the header, there is a search section with radio buttons for 'All properties', 'Leased properties only', and 'Owned properties only'. A note below the radio buttons reads: 'To find all properties in ProLease, leave all search fields blank and click the 'Find All' button.' The search fields are organized into two columns: 'Property Level Search Fields' and 'Lease Level Search Fields'. The 'Property Level Search Fields' include 'Property Address 1', 'Location ID', 'Property Code 2', and 'Manager'. The 'Lease Level Search Fields' include 'Primary Lease Code', 'Lease Code 2', 'Lease Code 3', and 'Lease Code 4'. Each field has a corresponding input box or dropdown menu.

2) Call the Most Awesome Tech Support in The Universe

That's us. The most awesome tech support in the universe. We know you have heard about us. You have probably even been searching for us. The search is over. You have finally found us. You can call us at 877-221-0229. This information is also located in the ProLease application on the Help menu.

Click “Help” on the menu bar and then select “C- Click here for awesome tech support...” and you will be looking at the screen below:



Awesome Tech Support

For the most AWESOME tech support in the universe,
contact us any time 24/7/365:

877-221-0229

or

support@prolease.com

Done

The image shows a dialog box with a yellow header bar containing the text "Awesome Tech Support". Below the header, the text reads "For the most AWESOME tech support in the universe, contact us any time 24/7/365:". The phone number "877-221-0229" is displayed in a large, bold font. Below the phone number, the word "or" is centered. Underneath "or", the email address "support@prolease.com" is displayed in a blue, underlined font. At the bottom center of the dialog box, there is a yellow button with the text "Done".

MANDATORY FIELDS

There are only a few mandatory fields in ProLease. Mandatory fields are designated with a red asterisk next to the field name. On the screen shot below you will see that the Measurement Type, Currency Type and Address 1 fields all have red asterisks indicating they are mandatory fields.

IMPORTANT - ProLease will not allow you to leave a screen if there is a mandatory field that is blank.

In the screen shot below, the Address 2 and Property Name fields are NOT mandatory because they do not have a red asterisk.

1. General Property Info

▶ Property Information Delete This Property

Measurement ***** Currency *****

Address 1 *****

Address 2

Property Name

MODIFYING DROP DOWN LISTS

Most of the drop-down boxes in ProLease are modifiable. The few that aren't modifiable don't need to be modified. It's easy to tell if a drop-down box is modifiable. On the screen shot below, you will see next to each of the drop-down boxes is an "M" button. "M" stands for Modify. To modify any one of these lists, click on the "M" button.

1. General Property Info

Property Information Delete This Property

Measurement * Currency *

Address 1 *
 Address 2
 Property Name

City State / Prov
 Zip County

Country Region
 Main Phone Suite

When you click on the M button for the Region field, you will be at the following screen:

Region

To modify an existing choice, click on the "View" button. To add a new choice to this list, click on the "Add New" button.

Add New Region

1.	<input type="button" value="View"/>	Midwest
2.	<input type="button" value="View"/>	Northeast
3.	<input type="button" value="View"/>	Northern Territory
4.	<input type="button" value="View"/>	Northwest
5.	<input type="button" value="View"/>	Rocky Mtn
6.	<input type="button" value="View"/>	Southeast
7.	<input type="button" value="View"/>	Southwest
8.	<input type="button" value="View"/>	UK

You can edit / delete any of the existing Regions by clicking on the View button or double clicking on the Region you want to edit / delete. To add a new Region, click on the button labeled “Add New Region”.

IMPORTANT – ProLease will not allow you to delete any choice off of a drop-down list if it is in use in the database.

Changing Drop Down Lists from The ProLease Main Menu

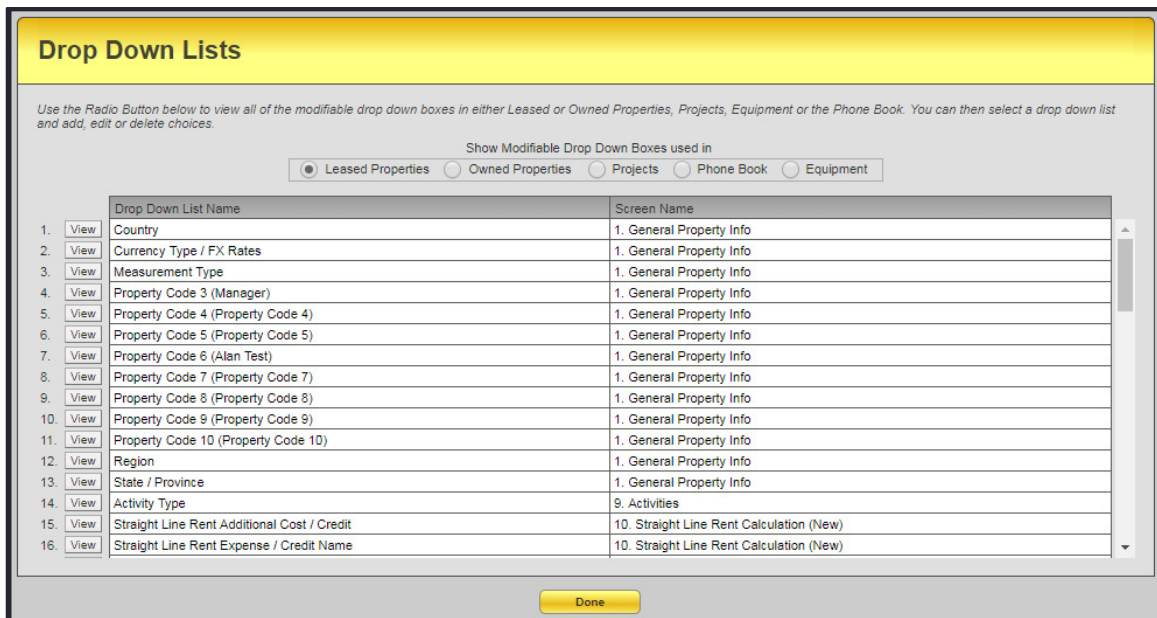
There are two places you can Add / Add / Delete choices from modifiable drop down lists.

- 1) You can do it while you are on any data entry screen
- 2) You can access any modifiable drop down list from the Global Settings

From the ProLease Main Menu, click on

- Global Settings
- Modify Drop Down Lists

You will now be looking at the following screen.



This is a list of every modifiable drop-down list in ProLease. From this screen, you can add / edit or delete choices from any modifiable drop-down list.

THE PROLEASE PHONE BOOK

In an effort to prevent you from having to type in company names, addresses, City, State, Zip, Phone, Fax, E-mail addresses etc. over and over again, ProLease allows you to create a “Phone Book” of contact information. Think about having a little black book sitting next to your computer and in that book, was every company that has anything to do with your portfolio.

IMPORTANT – The phone book is shared across all 5 modules (Real Estate, Equipment, Project Tracking, Workplace & Maintenance).

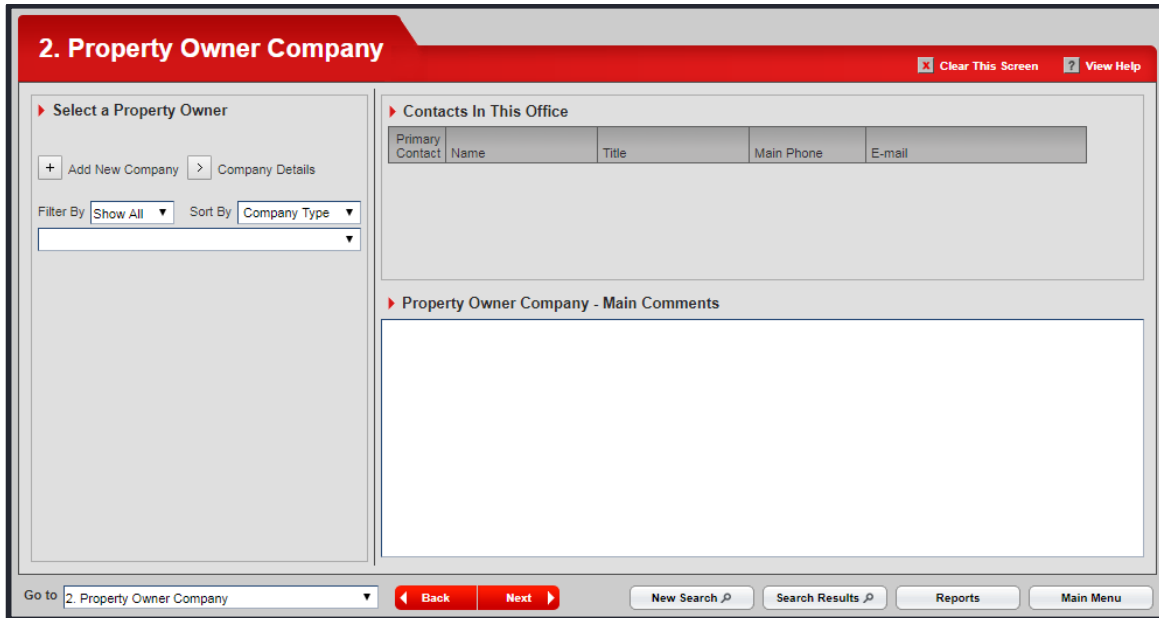
Typical entries in the phone book might be:

- Lawyer who negotiated the lease
- Architect
- Contractor
- Broker
- Landlord
- Leasing Agent
- Managing Agent
- Pay to Companies
- Furniture people
- Flooring
- Lighting
- Plumber
- Painter
- Electrician

Etc., etc., etc.

Anybody who has anything to do with your real estate, equipment, project tracking, workplace or maintenance module should get entered into the phone book. You enter the information once in the phone book and you can pick that company / person with one click on any screen in any module and all the information for that company / contact will automatically be populated on that screen.

For example, when you go to the Property Owner screen in the Real Estate module, it looks like this:



Rather than type in all the information for the property owner, you will select a name from the drop-down list in the “Select a Property Owner” section. When you click on the drop-down list, you will see a list of Company names. This is every company in the phone book.

2. Property Owner Company

▶ Select a Property Owner

+ Add New Company > Company Details

Filter By Show All ▼ Sort By Company Type ▼

▶ Contacts In This Office

Primary Contact	Name	Title

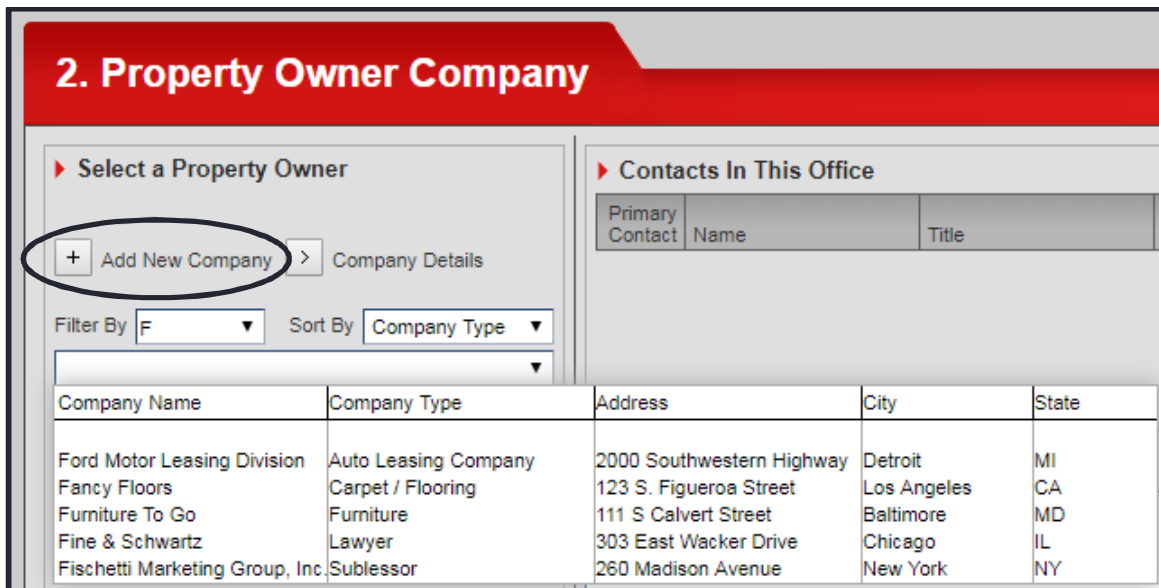
Company Name	Company Type	Address	City	State
Arthur Anderson	Accountant	33 West Monroe	Chicago	IL
Deloitte & Touche	Accountant	Ten Westport Road	Wilton	CT
Slomins	Alarm System	2300 Broad Hollow Road	Melville	NY
Abacus Architecture	Architect	246 Main Street	Boston	MA
Sandcastle Construction Inc	Architect	26 Jefferson Avenue,	Phoenix	AZ
Ford Motor Leasing Division	Auto Leasing Company	2000 Southwestern Highway	Detroit	MI
Bank Of America	Bank	1104 Wilshire Boulevard	Los Angeles	CA
Data Carpet	Carpet / Flooring	14723-90 Alfonse Boulevard	Garden City	NY
Fancy Floors	Carpet / Flooring	123 S. Figueroa Street	Los Angeles	CA
Best Foods	Catering	167-233 Forest Hills Boulevard	Forest Hills	NY
Kraft Catering	Catering	123 S. Main Street	Los Angeles	CA
ABC Cleaning Company	Cleaning Service	1700 Broadway	New York	NY
ABC Cleaning Company	Cleaning Service	1001 Wilshire Boulevard	Los Angeles	CA
Dell Computer Company	Computer Company	1101 Oak Tree Boulevard	Houston	TX

You can sort this list either by:

- Company Name
- Company Type

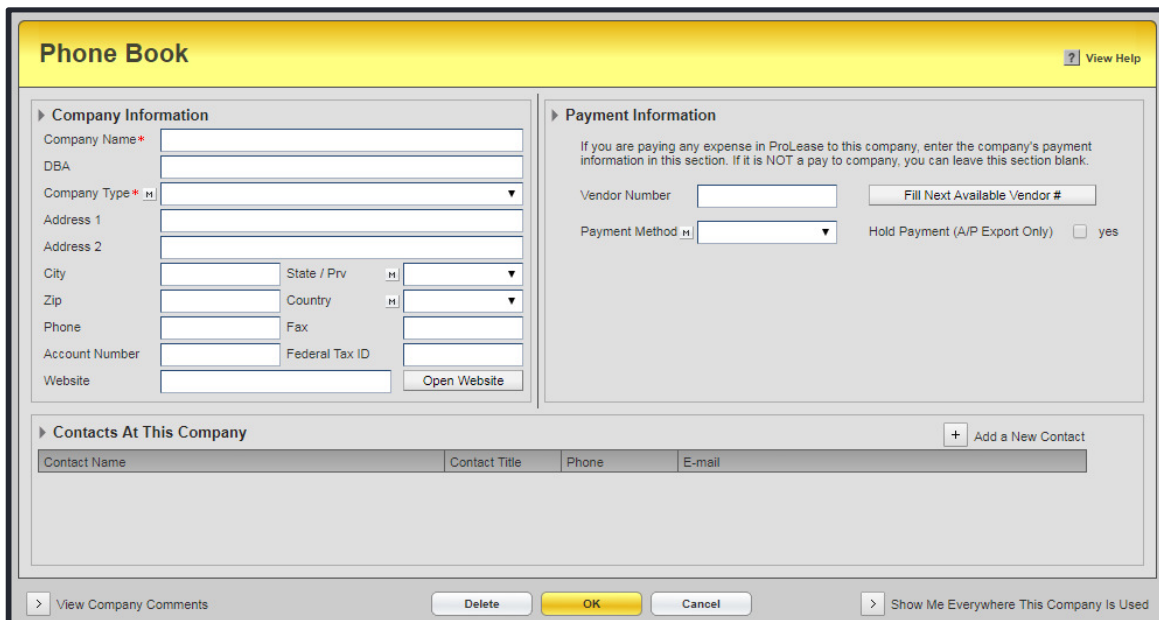
In addition, you can filter the list to show all the records that begin with the letter A, B, C etc,

Filtering for companies that begin with the letter “F”:



Adding a new record to the phone book

Suppose you just signed a new lease with a new landlord that you have never done business with before so they are NOT in your phone book. You need to add them to your phone book. You can click on “Add New Company” (circled above) and you will be taken to the following data entry screen:



The screen above is the information you can track for each company you add to the phone book.

-The left side is all about the company location (Address, City, State etc.).

-The right-hand side only needs to be filled in if you are going to be paying this company money. You will need to enter a Vendor # that will match the Vendor # in you're A/P program. The Payment method can be check or ACH Payment.

-If you check the "Hold Payment" checkbox, that means when you run the A/P export report, nothing owed to this vendor will be included in the A/P export report.

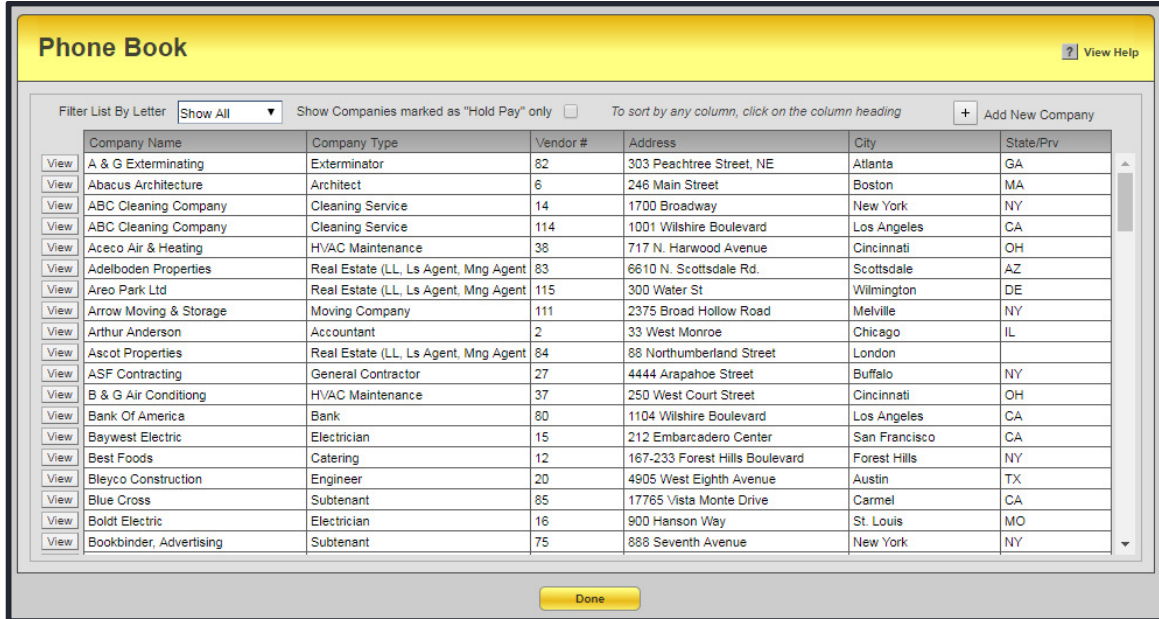
-The bottom part of this screen will allow you to enter an unlimited number of contacts at this company.

Accessing the Phone Book from the Global Settings

From the ProLease Main Menu, click on:

- Global Settings
- 2. Phone Book

And you will be at the following screen:



-From the screen above you can add new records to the phone book by clicking on the "Add New Company" button in the upper right corner.

-You can edit / change any existing piece of information in any existing company or contact.

-You can also delete any record from the phone book however, ProLease will NOT allow you to delete a record from the phone book that is in use. If you attempt to delete a record and you get a message telling you that you cannot delete that record because it is in use, in the lower right corner of the screen below is a button labeled “Show me everywhere this company is used”. Click this button and it will run a report to show you everywhere this company is in use.

Phone Book ? View Help

Company Information

Company Name*
DBA
Company Type*
Address 1
Address 2
City State / Prv
Zip Country
Phone Fax
Account Number Federal Tax ID
Website

Payment Information

If you are paying any expense in ProLease to this company, enter the company's payment information in this section. If it is NOT a pay to company, you can leave this section blank.

Vendor Number
Payment Method
Hold Payment (A/P Export Only) yes

Contacts At This Company

Contact Name	Contact Title	Phone	E-mail	
Steve Christian	Vice President	415-320-0200	schristian@baywestelec.com	<input type="button" value="View"/>

PREFERENCES

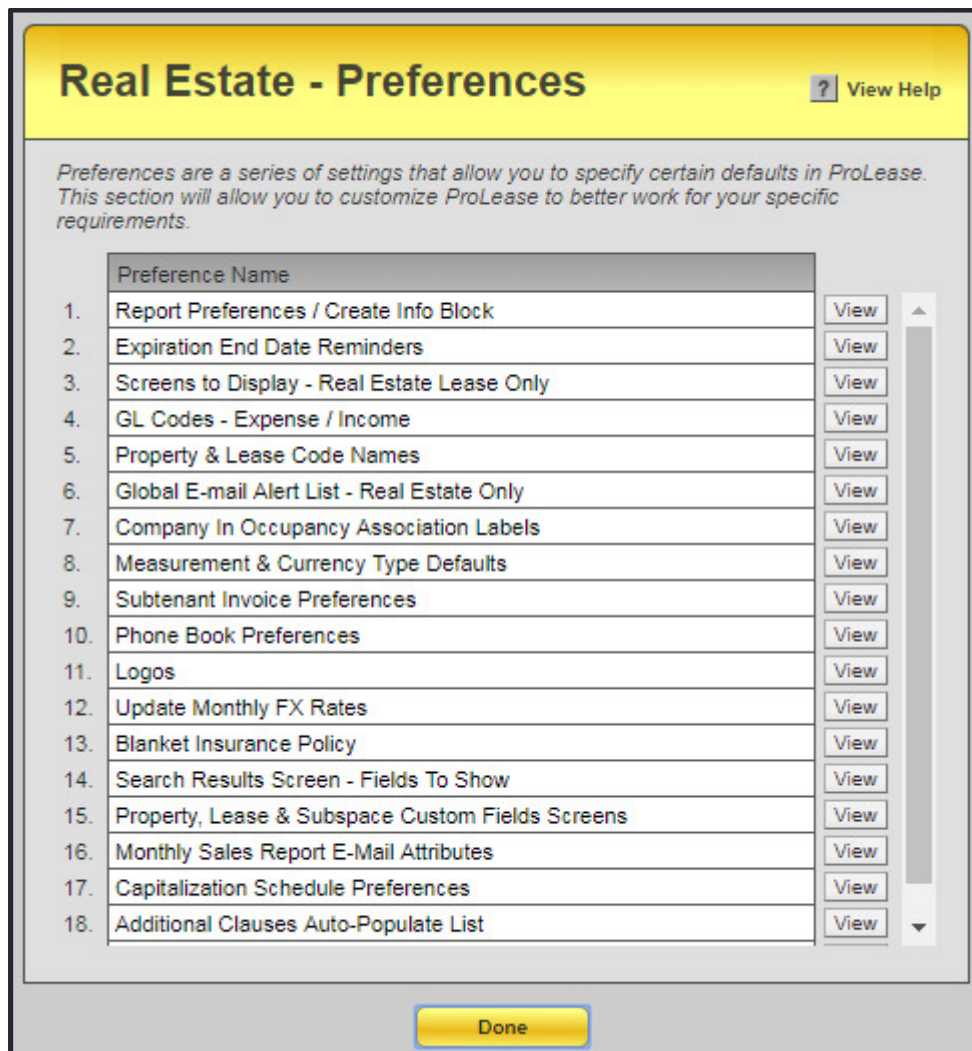
ProLease has a section called Preferences. The preferences section allows you to set up certain defaults so you can customize ProLease to work better for your company’s needs.

You must have the proper login rights to get access to the preferences section. Generally only people who have edit access to the entire database should have rights to change the preferences.

To go to the preferences, from the ProLease Main Menu, click on:

- Global Settings
- 6. Modify Preferences

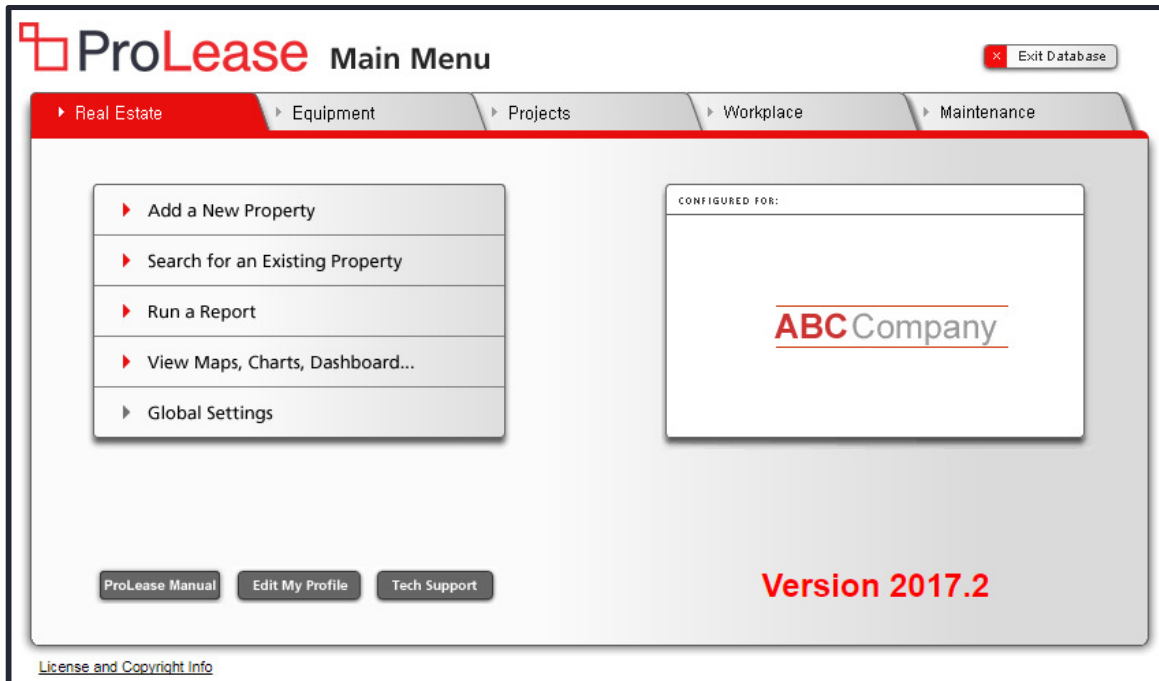
You will now be looking at the following screen:



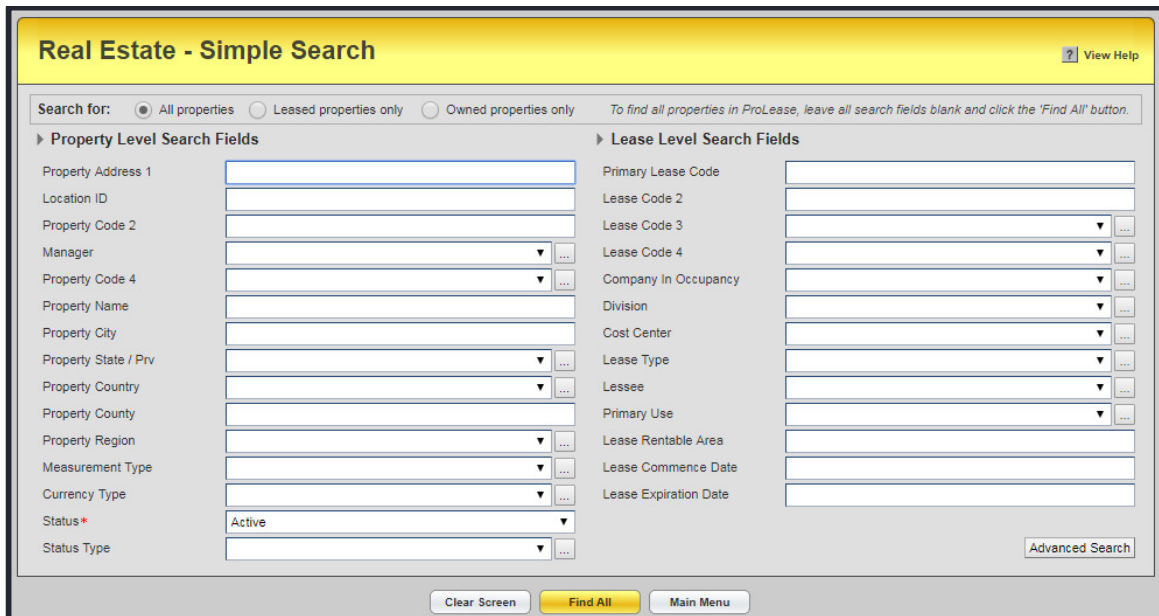
You can click on the “View” button for each preference (or double click on it) and see what you have the ability to change. There are also detailed help screens for each preference shown above.

SEARCHING FOR A PROPERTY

When you are at the ProLease Main Menu:



Click on "Search for an Existing Property" and you will be taken to the following screen:



There are two kinds of searches in ProLease:

- Simple Search
- Advanced Search

The screen above is the simple search screen. These are the fields you are going to use to search on 99.99999% of the time. You will see the advanced search button in the lower right corner of the screen above. The advanced search will allow you to search by any field in ProLease. Trust me, 99.99999% of the time you are going to use the simple search fields.

When you get to the simple search screen, you do not have to enter any data in the search fields. You can just click on the “Find All” button at the bottom of the screen and ProLease will take you to a list of all the properties in your ProLease database.

IMPORTANT – When you do a search, if there are multiple properties that meet your search criteria, ProLease will take you to the Search Results screen and show you a list of all the properties. If there is only one property that meets your search criteria, it will take you right to the General Property Info screen for that property.

Entering data on the search screen

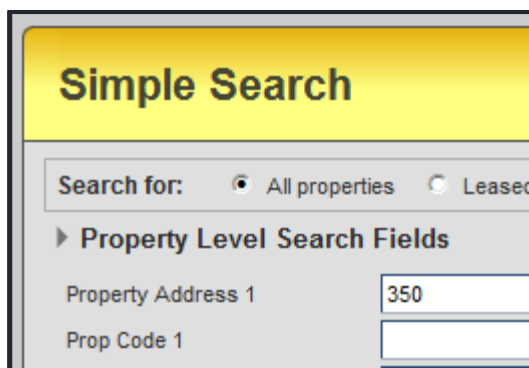
There are three types of fields on the search screen:

- Text Fields
- Drop down boxes
- Numeric fields

Searching on text fields –

- Property Address
- Property Code 1
- Property Code 2
- Property Name
- Property City
- Property County
- Lease Code 1
- Lease Code 2

When entering data in text fields you can enter any string of text. For example, if you wanted to search for a property with the address of 350 5th Avenue in the property address field you could type in 350,



hit the “Find All” button and it will take you to a list of all the properties that have 350 in the address. This includes:

- 350 5th Avenue
- 3500 East West Highway
- 87350 Johnson Boulevard.

If you wanted to find all the properties in the city of New York, in the City field you would type in New York.

Simple Search

Search for: All properties Leased properties only

▶ Property Level Search Fields

Property Address 1	<input type="text"/>
Prop Code 1	<input type="text"/>
Prop Code 2	<input type="text"/>
Prop Code 3	<input type="text"/>
Prop Code 4	<input type="text"/>
Property Name	<input type="text"/>
Property City	<input type="text" value="New York"/>

hit the “Find All” button and it will take you to a list of all the properties in the City of New York.

What if you wanted to find all the properties in the city of New York, Miami, and Los Angeles? When entering search criteria in a text field, you can enter multiple text strings by separating them with a comma. In the city field, you would type in:

Simple Search

Search for: All properties Leased properties only Owned properties only

▶ Property Level Search Fields

Property Address 1	<input type="text"/>
Prop Code 1	<input type="text"/>
Prop Code 2	<input type="text"/>
Prop Code 3	<input type="text"/>
Prop Code 4	<input type="text"/>
Property Name	<input type="text"/>
Property City	<input type="text" value="New York,Miami,Los Angeles"/>

Hit the “Find All” button and it would take you to a list of all the properties in all three of those cities. By separating the text strings with a comma, ProLease knows that these are separate text strings and it will return all the properties in those three cities.

IMPORTANT – You could also type in New,Mia,Los and it would find all the same properties. Because this is a text field, you can type in any string of text and it will find all the properties that match that string. You do not need to type in the entire word.

The image shows a screenshot of a web application interface titled "Simple Search". At the top, there is a yellow header with the title. Below the header, there is a "Search for:" section with three radio buttons: "All properties" (selected), "Leased properties only", and "Owned properties only". Underneath is a section titled "Property Level Search Fields" with a right-pointing arrow. This section contains several input fields: "Property Address 1", "Prop Code 1", "Prop Code 2", "Prop Code 3", "Prop Code 4", "Property Name", and "Property City". The "Property City" field is circled in red and contains the text "New,Mia,Los". The "Prop Code 3" and "Prop Code 4" fields have dropdown arrows and ellipsis buttons on their right sides.

Searching on drop down boxes -

- Property Code 3
- Property Code 4
- State
- Country
- Region
- Measurement Type
- Currency Type
- Status
- Status Type
- Lease Code 3
- Lease Code 4
- Company in Occupancy
- Cost Center
- Lease Type
- Lessee
- Primary Use

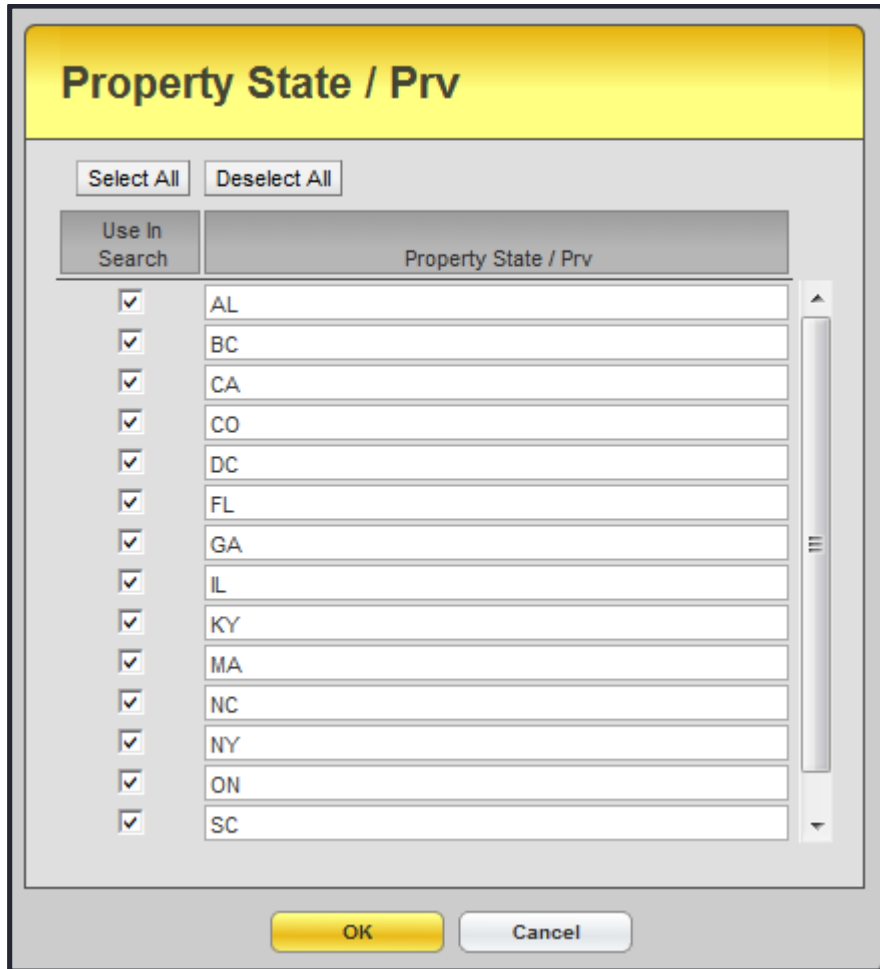
You can only select one choice from a drop-down list. For example, if you wanted to find all the properties in the State of Colorado, in the State field you would select Colorado

The screenshot shows a web interface titled "Simple Search". At the top, there is a yellow header with the title. Below the header, there is a "Search for:" section with three radio buttons: "All properties" (selected), "Leased properties only", and "Owned properties only". Underneath, there is a section titled "Property Level Search Fields" with a right-pointing arrow. This section contains several input fields: "Property Address 1", "Prop Code 1", "Prop Code 2", "Prop Code 3", "Prop Code 4", "Property Name", "Property City", and "Property State / Prv". The "Property State / Prv" field contains the text "CO" and has a dropdown arrow and a "..." button next to it. The other fields also have "..." buttons next to them, but they are not visible in the screenshot.

click on the "Find All" button and ProLease would return all the properties in the State of Colorado.

What if you wanted to find all the properties in multiple States (i.e. Colorado, California & Florida). You can only select one choice from the drop-down list but...you could click

on the three-dot button next to the State field and it gives you a different view of the list. You would now see:



You can now click the "Deselect All" button and no states will be chosen. Then check as many states as you want and click OK. You will now be back at the Simple Search screen and it will say "Multiple Chosen" in the State field to let you know that there are multiple states that have been chosen

Simple Search ? View Help for This Screen

Search for: All properties Leased properties only Owned properties only *To find all properties in ProLease, leave all search fields blank and click the 'Find All' button.*

Property Level Search Fields

- Property Address 1
- Prop Code 1
- Prop Code 2
- Prop Code 3
- Prop Code 4
- Property Name
- Property City
- Property State / Prv **Multiple Chosen**
- Property Country
- Property County
- Property Region
- Measurement Type
- Currency Type
- Status * Active
- Status Type

Lease Level Search Fields

- Lease Code 1
- Lease Code 2
- Lease Code 3
- Lease Code 4
- Company in Occupancy
- Cost Center
- Lease Type
- Lessee
- Primary Use
- Lease Rentable Area
- Lease Commence Date
- Lease Expiration Date

Clear Screen **Find All** Main Menu Advanced Search

Click on the “Find All” button and ProLease will return all the properties in the States you have selected.

Searching on numeric fields -

- Lease Rentable Area
- Lease Commencement Date
- Lease Expiration Date

Numeric fields allow you to use the >, <, >=, <=, = signs. Suppose you wanted to find a lease that was 5,000 SF. In the Lease Rentable Area field, you would type in =5000.

Lease Rentable Area	<input type="text" value="=5000"/>
Lease Commence Date	<input type="text"/>
Lease Expiration Date	<input type="text"/>

Now click on the “Find All” button and ProLease will return all leases that are exactly 5,000 SF.

What if you wanted to find all leases that are greater than or equal to 5,000 SF. You would type in:

Lease Rentable Area	<input type="text" value=">=5000"/>
Lease Commence Date	<input type="text"/>
Lease Expiration Date	<input type="text"/>

What if you wanted to find all leases that commenced on or after 1/1/2011, you would type in:

Lease Commence Date	<input type="text" value=">=1/1/2011"/>
Lease Expiration Date	<input type="text"/>

What if you wanted to see all leases that were expiring between 5/1/2012 and 4/30/2013, you would type in:

Lease Commence Date	<input type="text"/>
Lease Expiration Date	<input type="text" value="5/1/2012...4/30/2013"/>

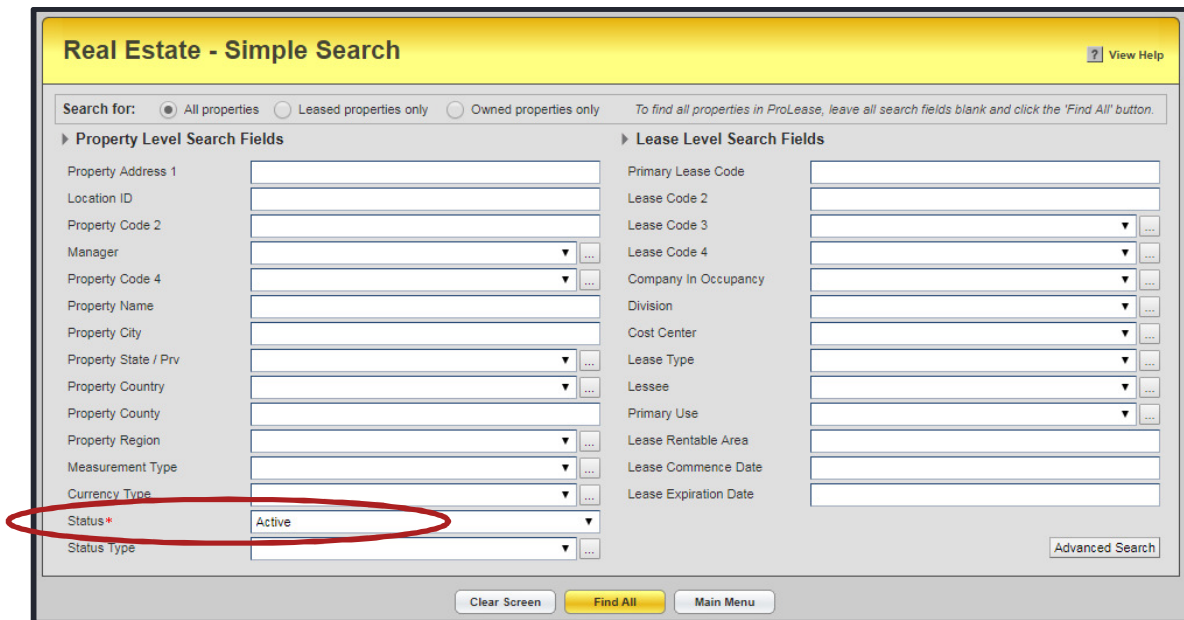
By separating the two dates with three dots, ProLease knows that this is a range and it will return a list of all leases that have an expiration date between on or after 5/1/2012 and on or before 4/30/2013.

Remember, you do NOT have to enter any search criteria on this screen. When you get here you can just click on the “Find All” button and it will take you to a list of all the properties in ProLease.

Active vs Inactive status -

There are two fields in the lower left corner of the search screen labeled:

- Status
- Status Type



As a default, ProLease will only search for “Active” properties. You can switch this to show “Inactive” properties only or “All” properties (Active & Inactive).

In addition, you might have multiple different status’s that are Active and multiple different status’s that are Inactive. The “Status Type” field will allow you to select only certain types of Active status’s or inactive statuses to search for. The Status Type will allow you to further hone your search for properties.

DATA ENTRY SCREENS – COLOR CODING

In ProLease, there are 5 types of data entry screens and they are all color coded as follows:

- | | |
|----------------------|--------|
| 1) Leased Properties | Red |
| 2) Owned Properties | Blue |
| 3) Subtenants | Green |
| 4) Projects | Orange |
| 5) Equipment Leases | Brown |

Sample Leased Property Data Entry Screen

1. General Property Info View Help for This Screen

Property Information Delete This Property

Measurement * Currency *

Address 1 *

All Leases In Property View Floor Info + Add a New Lease

Lease Type	Lessee / Subtenant	Commence	Expire	Today's RSF	
Direct w/ LL	Bushell Publishing, Inc.	12/1/2001	1/31/2014	25,000.00	View
Our Subtenant	XYZ Company	7/12/2009	1/31/2014	4,000.00	View

Sample Owned Property Data Entry Screen

1. General Property Info View Help for This Screen

Property Information Delete This Property

Measurement * Currency *

Address 1 *

Tenants / Subtenants + Add New Lease / Subtenant

Lease Type	Lessee / Subtenant	Commence	Expire	Today's RSF	
Our Subtenant	Sirus Industries	2/1/2008	1/31/2013	4,000.00	View

Sample Subtenant Lease Data Entry Screen

10. General Lease Info Select Another Lease View Help for This Screen

Subtenant *

Name Lease Code

Record Created By

Date Created

Subtenant Contacts + Add New Contact

Contact Name Main Phone

Lease Approval Info

Sample Project Data Entry Screen

1. General Project Info View Help for This Screen

Project Information Delete This Project

Project Name *

Project Type *

Project Status *

Project Budget Information

Currency *

Total amount budgeted for project

Total amount paid to date for project

Sample Equipment Data Entry Screen

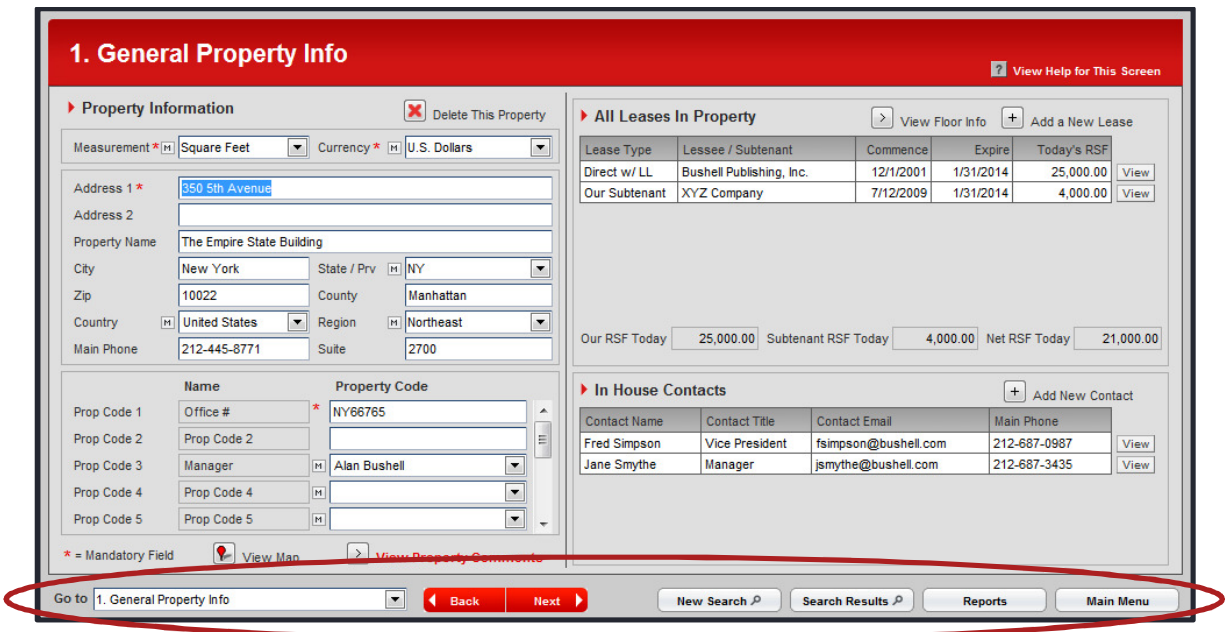
The screenshot displays a software interface for entering lease information. At the top, a dark header bar contains the text "1. Equipment - General Lease / Asset Information" and a "View Help" link. Below this, a section titled "Lease Information" contains several data entry fields: "Lessee*" with a dropdown menu showing "Bushell Industries", "Lease Classification" with a dropdown menu showing "Finance", and "Lease Status*" with a dropdown menu showing "Has Expiration Date (Active)". A "Delete This Lease" button with a red 'X' icon is located to the right of the Lease Status field. Below these fields, the "Currency Type*" dropdown menu shows "U.S. Dollars". At the bottom of the form, the text "Lease Term = 4/12/2014 - 4/11/2019 // 5 Years 0 Months 0 Days - 60.00 Months" is displayed.

So, when you are on any data entry screen it is very easy for you to know exactly what type of data entry screen you are looking at based on the color of the screen.

DATA ENTRY SCREENS – NAVIGATING

Now that we know how to search for a property, once we are in the property, we need to know how to find the information we are looking for. This requires you to navigate through the property.

Whenever you go into a property (Leased or Owned), the first screen you will see is “1. General Property Info screen”. By looking at the screen shot below you immediately know this is a leased property because the top bar is red.



In a leased property, there are 44 different data entry screens. You are looking at screen #1. How do you get to the other 43 data entry screens?

At the bottom of the screen is the ProLease Navigation Bar (Circled above).

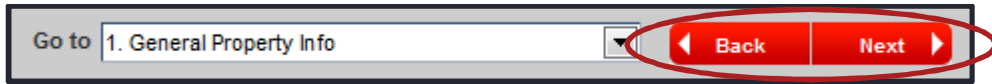
Navigation method #1 - In the lower left corner of the screen is the Go To menu. It is a drop-down box. If you click on it you will see the following:

Go to:	Data Level	
1	General Property Info	Property
2	Property Owner Company	Property
3	Leasing Agent Company	Property
4	Managing Agent Company	Property
5	Vendors	Property
6	Building Operation & HVAC Hours	Property
7	Property Level Custom Fields	Property
8	Projects & Assets Associated with Property	Property
9	Activities	Property
10	Straight Line Rent Calculation (New)	Property
11	Total Expenses In This Property	Property
12	Capitalization Schedules	Property
13	General Lease Info	Lease
14	Lease Term / Options	Lease
15	Rentable Area / Subspaces	Subspace
16	Base Rent	Subspace
17	Free Rent	Subspace
18	CPI & Percentage Increases	Subspace
19	Operating Expenses & CAM	Subspace
20	Real Estate Taxes	Subspace
21	Utility Costs	Subspace
22	Parking	Subspace
23	Additional Costs and Credits	Subspace
24	Management Fee	Subspace
25	Occupancy / Sales Tax	Subspace
26	Retail - % Rent	Subspace
27	Allocations	Subspace
28	Landlord TI / Tenant Contributions	Subspace
29	Subspace Level Custom Fields	Subspace
30	Tenant's Broker	Lease
31	Security Deposit	Lease
32	Insurance / Asset Replacement Cost	Lease
33	Sublease / Assignment Rights	Lease
34	Tenant Sends Official Notices To	Lease
35	Landlord Sends Official Notices To	Lease
36	Holdover Costs / Restoration	Lease
37	Amendments	Lease
38	LL Relocation / Audit Rights / Late Fees	Lease
39	Maintenance and Repair	Lease
40	Additional Clauses	Lease
41	Lease Level Custom Fields	Lease
42	Key Metrics	Lease
43	Documents	Lease
44	E-Mail Reminders	Lease

There are 44 data entry screens in a leased property. In an owned property, there only 24 screens. Some are the same, some are different to accommodate the owned perspective.

Once you are in a property, you can easily navigate to any data entry screen simply by clicking on the Go To menu and clicking on one of the screens shown on the menu. I ask you, could this be any easier???

Navigating method #2 – On the navigation bar at the bottom of the screen there are two buttons labeled Back & Next.



You can navigate through the screens one at a time by clicking Back or Next. When you create a new property and you are entering the initial data, it will be good to keep clicking Next and it will walk you through the data entry form one screen at a time so you can enter the data. The genius of ProLease is not that it gives you the answers but rather that it teaches you the questions.

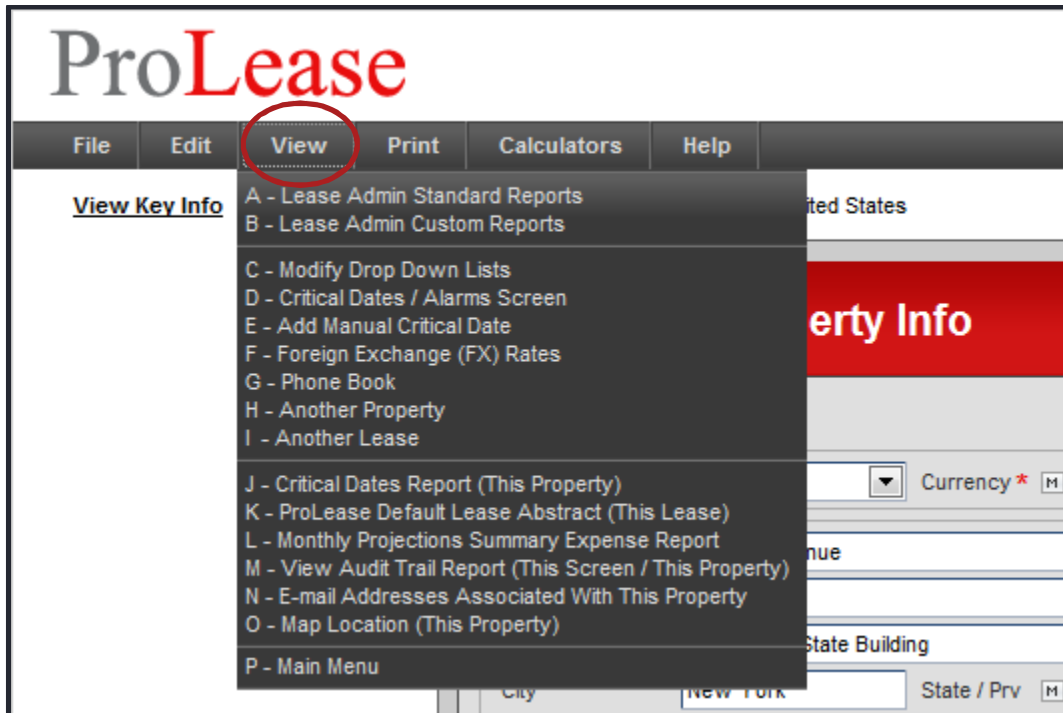
Navigating method #3 –

- Suppose you are in a property and you want to do another search
- Suppose you did a search that returned multiple properties, you are in one of those properties but you want to go back to the Search Results screen to choose a new property to go into.
- Suppose you want to go and run a Report
- Suppose you want to go back to the ProLease Main Menu

In the navigation bar at the bottom there are 4 buttons that will allow you to any of the above



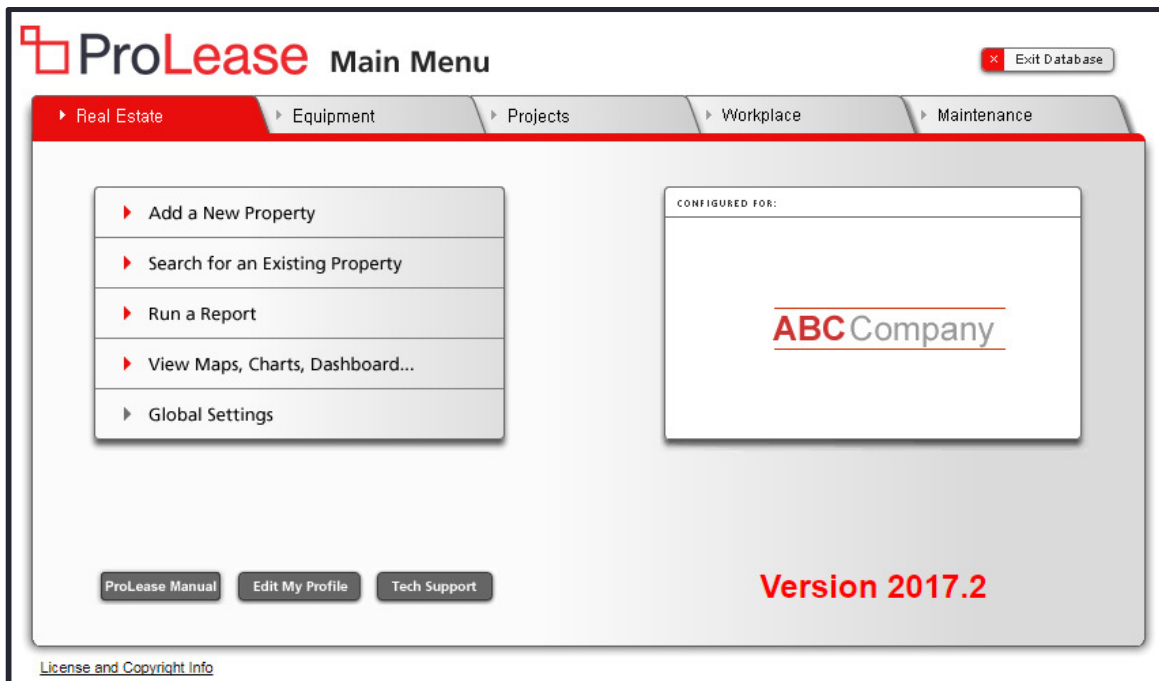
Navigating method #4 – So now you should understand all the buttons on the navigation bar at the bottom of every data entry screen. There is one other navigation menu. On every data entry screen, there is a menu bar at the top of the screen. Click on the “View” menu and the following menu will drop down:



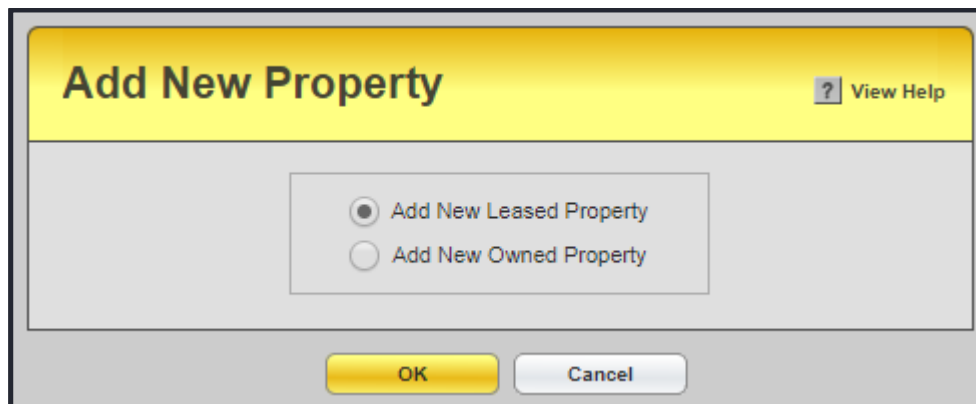
The view menu will allow you to navigate to any other section of ProLease other than the data entry screens.

ADDING A NEW PROPERTY

To add a new property, go to the ProLease Main Menu:



Click on the button labeled “Add New Property” and you will be at the following screen:



Select whether you want to add a leased property or an owned property, click the OK button at the bottom of the screen and you will be at the following screen:

Leased Property Mandatory Fields

The fields below are the mandatory fields you must fill in to add a new leased property to ProLease. All mandatory fields are designated with a red asterisk.

Street Address Only *		<input type="text"/>
Lease Type *		Direct with Landlord ▼
Lessee *	M	<input type="text"/> ▼
Primary Use *	M	<input type="text"/> ▼
Status *	M	Has Expiration Date (Active) ▼
Measurement Type *	M	Square Feet ▼
Rentable Area *		<input type="text"/>
Currency Type *	M	U.S. Dollars ▼
Commence Date *		<input type="text"/>
Expiration Date *		<input type="text"/>

* = Mandatory Field

When you want to add a new property to the real estate module, the first thing we make you do is enter all the mandatory fields. The screen above is all the mandatory fields to add a new leased property to the real estate module. Notice all of the fields have a red asterisk next to them.

IMPORTANT – You **MUST** fill in all of the fields on this screen to add a new property to the database. If you do not know the answer to any of these fields enter a guess. All of the fields on this screen appear on the 44 data entry screens so you can change any of them at a later date.

Once you fill in all the fields on this screen, click the OK button at the bottom of the screen and you will get a message saying, “Please wait while the property is created”. ProLease is now creating the 44 different data entry screens for this new property. When it is done, you will be taken to the General Property Info screen and you will be able to enter data on any of the 44 data entry screens.

Primary Property Code

There is one mandatory field in ProLease that you are NOT asked to fill in on the screen above. That is the Primary Property Code. The Primary Property Code is a unique identifier for every property in the database. It is a text field. It can be any combination of numbers and letters you want. The Primary Property Code appears on screen #1 – General Property Info.

Name	Property Code
Prop Code 1 *	Location ID
Prop Code 2	Property Code 2
Prop Code 3	Manager
Prop Code 4	Property Code 4
Prop Code 5	Property Code 5

There are actually 12 different property codes. Property Code #1 is the Primary Property Code. You can change the name of any of the property codes. This is done in the “Preferences” section. In my database, I changed the name of Property Code 1 to “Location ID”.

Because the primary Property Code has to be unique to every property, ProLease does not ask you to fill it in. ProLease populates the field automatically with a unique ID. In the example above, this is property code 000127. Remember, this is a text field. It can be any combination of numbers and letters you want however, it must be unique to every property (record) in the database.

If you have your own system of coding properties, this is where you would enter your unique code for this property. If you do not have your own system for coding properties, you can let ProLease generate a unique ID for each property and you do not have to worry about this.

PROPERTY CODES

On the previous page, we discussed the Primary Property Code. There are actually 12 Property Codes that are user defined fields (UDF's).

Property codes 1, 2, 11 & 12 are text fields
Property Codes 3-10 are modifiable drop-down lists

Property Code #1 MUST be unique to every property in ProLease. Property codes 2,11 & 12 you have the option to require unique or allow duplicates.

You can re-name any of the property codes to any name you want. This is done in the Preferences section. In the screen shot below, I changed the name of property code 3 to "Manager". Every property in my database gets assigned to a manager.

	Name	Property Code
Prop Code 1 *	Location ID	000127
Prop Code 2	Property Code 2	
Prop Code 3	Manager M	Alan Bushell ▼
Prop Code 4	Property Code 4 M	▼
Prop Code 5	Property Code 5 M	▼

These property codes allow me to do 3 things:

- 1) When I create a login, I can restrict the login to only have access to properties where Alan Bushell is the manager. Or I can allow access to properties where Alan Bushell or Steve Johnson is the manager.
- 2) When I am on the search screen, I can search for properties where Alan Bushell is the manager. Or, where Alan Bushell or Steve Johnson is the managers.
- 3) When I run a report, I can filter the report to only include properties where Alan Bushell is the manager. Or, where Alan Bushell or Steve Johnson is the manager.

CRITICAL DATES

ProLease has an awesome critical date system that will alert you to critical dates in three different ways:

- Critical date alarm screen
- Daily E-mail alerts
- Critical date reports

Before we go into detail about how ProLease alerts you to critical dates, you must first understand what ProLease considers a critical date. There are 26 critical dates in ProLease. They are:

- 1) Lease expiration reminder date
- 2) Lease expiration date

- 3) Renewal option reminder date
- 4) Renewal option landlord notify date
- 5) Renewal option active date

- 6) Cancellation option reminder date
- 7) Cancellation option landlord notify date
- 8) Cancellation option active date

- 9) Expansion option reminder date
- 10) Expansion option landlord notify date
- 11) Expansion option active date

- 12) Contraction option reminder date
- 13) Contraction option landlord notify date
- 14) Contraction option active date

- 15) Purchase option reminder date
- 16) Purchase option landlord notify date
- 17) Purchase option active date

- 18) Security deposit critical date

- 19) Insurance critical date

- 20) Landlord TI Owed Reminder Date
- 21) Landlord TI Owed End Date

- 22) Additional clause reminder date

23) Additional clause active date

24) Manual critical date

25) Owned property expense end date reminder

26) Owned property expense end date

All of the above dates are entered on different data entry screens. When you are on any data entry screen, ProLease makes it easy to identify which dates are considered critical dates. After the field name, the critical dates are followed by a (CD) which stands for Critical Date (how logical).



The image shows a screenshot of a data entry field. The field is labeled "Lease Expiration Date (CD) *" and contains the date "11/30/2019". The "(CD)" part of the label is circled in red, indicating that it is a critical date.

IMPORTANT - Although I said there were 26 critical dates, the additional clause screen allows you to create any clause you want. In addition, the manual critical date allows you to enter any critical date of your choice. So, between the additional clause dates and the manual critical dates, there is no critical date that you cannot enter into ProLease.

Lease Expiration Dates

- 1) Lease expiration reminder date
- 2) Lease expiration date

These two dates get entered on the Lease Term / Options screen.



The screenshot shows a software interface with a red header bar containing the text "11. Lease Term / Options". Below the header is a grey panel with a section titled "Lease Term Dates" preceded by a right-pointing triangle. This section contains three rows of input fields:

Lease Commence Date *	9/23/2009
Lease Expiration Date (CD) *	11/30/2019
Expiration Reminder Date (CD) *	6/3/2019

At the bottom of the grey panel, there is a line of text: "FYI - Your Lease term is 10 Years 2 Months 8 Days - 122.27 months".

They are both mandatory fields (Red asterisk). You do not have to enter an expiration reminder date. When you enter a lease expiration date, the reminder date automatically calculates. In the Preferences section, there is a preference that will allow you to set the number of days you want to be reminded of lease expiration dates. The lease expiration reminder date will automatically calculate based on the lease expiration date. However, you will need a much longer reminder date for a 50,000 SF lease than you will for a 4,000 SF lease so ProLease allows you to change the reminder date for any lease on the lease term screen.

Renewal Option Dates

- 3) Renewal option reminder date
- 4) Renewal option landlord notify date
- 5) Renewal option active date

All options get entered on the Lease term / Options screen. Below is a sample of the Renewal option screen.

The screenshot shows a software window titled "Option Details" with a red header bar. In the top right corner of the header, there is a help icon and the text "View Help for This Screen". Below the header, the form contains the following elements:

- Option Type ***: A dropdown menu with "Renewal" selected. To its right is a "Page Number" input field.
- FYI - The current lease expiration date is 11/30/2019**: A grey informational message.
- Active Date (CD) ***: A date input field containing "12/1/2019".
- Landlord Notify Date (CD) ***: A date input field containing "6/1/2019".
- Reminder Date (CD) ***: A date input field containing "2/1/2019".
- Term Calculator**: A button with a calendar icon.
- Does Renewal Option Have A Specific Expiration Date?**: A dropdown menu with "Yes" selected.
- Renewal Option Expiration Date ***: A date input field containing "11/30/2024".
- Option Term is 5 Years 0 Months 0 Days - 60.00 months**: A grey informational message.
- Option Status**: A dropdown menu with "Too early to decide" selected.
- Person Responsible**: A dropdown menu with "Alan Bushell" selected. Below this dropdown, the contact information "Phone is 516-767-0120" and "Email is alan@procalc.com" is displayed.
- View Option Comments**: A button with a right-pointing arrow icon.

At the bottom of the window, there are three buttons: "Delete", "OK" (highlighted in red), and "Cancel".

The Active date is the first date of the renewal term. In the example above, the current lease expires on 11/30/2019. The Active date is the next day 12/1/2019.

The Landlord notify date is the date the landlord must be notified of your intention to exercise the option.

The Reminder date is the date you want ProLease to remind you about this option so you can start to think about it and figure out what you are going to tell the landlord on the notification date.

Cancellation Option Dates

- 6) Cancellation option reminder date
- 7) Cancellation option landlord notify date
- 8) Cancellation option active date

All options get entered on the Lease term / Options screen. Below is a sample of the Cancellation option screen.

Option Details [View Help for This Screen](#)

Option Type * Cancellation

FYI - Your term is from 9/23/2009 to 11/30/2019 - 122.27 months

Option has specific dates Option has no specific dates

Active Date (CD) *

Landlord Notify Date (CD) *

Reminder Date (CD) *

Term Calculator

Option Status Person Responsible Alan Bushell

Phone is 516-767-0120
Email is alan@procalc.com

[View Option Comments](#)

Delete OK Cancel

Expansion Option Dates

- 9) Expansion option reminder date
- 10) Expansion option landlord notify date
- 11) Expansion option active date

All options get entered on the Lease term / Options screen. Below is a sample of the Expansion option screen.

Option Details View Help for This Screen

Option Type * Page Number

Option or Must Take *

Option has specific dates Option has no specific dates

Active Date (CD) *

Landlord Notify Date (CD) *

Reminder Date (CD) *

Term Calculator

Floor or Suite #

Option Rentable Area

Option Status

Person Responsible
Phone is 516-767-0120
Email is alan@procalc.com

Contraction Option Dates

- 12) Contraction option reminder date
- 13) Contraction option landlord notify date
- 14) Contraction option active date

All options get entered on the Lease term / Options screen. Below is a sample of the Contraction option screen.

The screenshot shows a software window titled "Option Details" with a red header bar. In the top right corner of the header, there is a help icon and the text "View Help for This Screen". The main content area is divided into several sections:

- Option Type ***: A dropdown menu set to "Contraction". To its right is a "Page Number" input field.
- Option or Must Contract ***: A dropdown menu set to "Option".
- Option has specific dates**: A radio button that is selected.
- Option has no specific dates**: An unselected radio button.
- Active Date (CD) ***: A date input field containing "7/1/2014".
- Landlord Notify Date (CD) ***: A date input field containing "12/1/2013".
- Reminder Date (CD) ***: A date input field containing "6/1/2013".
- Term Calculator**: A button with a calculator icon.
- Floor or Suite #**: An input field containing "Suite 2300".
- Option Rentable Area**: An input field containing "5,000.00".
- Option Status**: A dropdown menu set to "Too early to decide".
- Person Responsible**: A dropdown menu set to "Alan Bushell". Below this dropdown, the text "Phone is 516-767-0120" and "Email is alan@procalc.com" is displayed.
- View Option Comments**: A button with a right-pointing arrow icon.

At the bottom of the window, there are three buttons: "Delete", "OK" (highlighted in red), and "Cancel".

Purchase Option Dates

- 15) Purchase option reminder date
- 16) Purchase option landlord notify date
- 17) Purchase option active date

All options get entered on the Lease term / Options screen. Below is a sample of the Purchase option screen.

The screenshot shows a software window titled "Option Details" with a red header bar. In the top right corner of the header, there is a help icon and the text "View Help for This Screen". Below the header, the main content area is divided into several sections. At the top, there is a form for "Option Type" with a dropdown menu set to "Purchase" and a "Page Number" input field. Below this, a grey box contains the text "FYI - The current lease expiration date is 11/30/2019". The next section contains three date fields: "Active Date (CD) *" with the value "12/1/2019", "Landlord Notify Date (CD) *" with "12/1/2018", and "Reminder Date (CD) *" with "6/1/2018". Below the dates is a "Term Calculator" button with a grid icon. The bottom section contains two dropdown menus: "Option Status" set to "Too early to decide" and "Person Responsible" set to "Alan Bushell". Under "Person Responsible", there is contact information: "Phone is 516-767-0120" and "Email is alan@procalc.com". At the bottom left of this section is a "View Option Comments" button with a right-pointing arrow icon. At the very bottom of the window are three buttons: "Delete", "OK" (highlighted in red), and "Cancel".

Other Option Types

In the world of commercial real estate, there are 5 types of options. They are:

- 1) Renewal Option
- 2) Cancellation Option

These are “Term” options. They deal with the term of your lease.

- 3) Expansion Option
- 4) Contraction Option

These are “Space” options. They deal with the amount of space you have.

- 5) Purchase Option

A “Purchase” option is exactly that. A purchase option. It does not deal with either your term or your space.

Each of the above 5 option types have different fields associated with them. In other words, when you select a renewal option, you are going to get different fields than you would get for a cancellation option.

The “Option Type” drop-down list in ProLease defaults to the 5 choices outlined above. However, people like to call options different names. For example, a ROFO (right of first offer) or ROFR (right of first refusal) are both options on another piece of space therefore they are really another word for “expansion” options. Some people might say they have a “termination” option. This is the right to cancel the lease. This is really a “cancellation” option.

In an effort to let you call your options whatever you want, the “Option Type” drop down list is a modifiable drop-down list. You can enter an unlimited number of “Option Types” however, each time you add a new choice to this list, you must pick what type of fields should be displayed for this option type (Renewal, Cancellation, Expansion, Contraction, Purchase fields).

For example, if I added an option type of ROFO, I would tell ProLease to show the fields for an “Expansion” option because a ROFO is really an option on an additional piece of space.

The screenshot shows a dialog box titled "Modify Drop Down Entry" with a yellow header. In the top right corner of the header is a "View Help" link. The main area of the dialog contains two labeled input fields: "Option Type*" with a text box containing "ROFO", and "Show Fields For*" with a dropdown menu currently displaying "Expansion". At the bottom of the dialog, there are three buttons: "Delete", "OK", and "Cancel".

Any time you add an option type to the drop-down list, you must specify what type of fields to show for the new option type.

Security Deposit Critical Date

18) Security deposit critical date – Your security deposit might reduce somewhere in the middle of the term or maybe you want a reminder to get it back by the end of the term. This is where you can set up a critical date reminder.

The screenshot shows a web form titled "Security Deposit" with a red header. In the top right corner of the header is a link that says "? View Help for This Screen". The form contains several fields: "Security Deposit Type" is a dropdown menu set to "Cash"; "Aggregate Security Deposit Amount *" is a text box containing "\$75,000.00"; "Interest Bearing Account?" is a checkbox that is unchecked; "Does this Deposit Reduce During the Term?" is a checkbox that is checked; below this is a note: "FYI - Enter reduction schedule in comments section below. Enter date of first reduction in Critical Date field."; "Critical Date (CD)" is a text box containing "6/30/2014", and this field is circled in red; "Security Deposit - Subform Comments" is a large text area containing the text: "If we make all of our rent payments on time through 6/30/2014, the landlord has agreed to refund 50% of the security deposit."; "Has this Security Deposit been Refunded?" is a checkbox that is unchecked. At the bottom of the form are three buttons: "Delete", "OK", and "Cancel".

Insurance Critical Date

19) Insurance critical date – Perhaps you have to get a new insurance certificate to a landlord or maybe you need to get a new insurance certificate from a subtenant. This is where you can enter the reminder date.

The screenshot shows the 'Insurance' form interface. On the left, there is a 'Select Company' section for 'Travelers Insurance' with contact details. The main area is divided into 'Contacts In This Office' (listing Andy Schultz and Terry Greiser) and 'Additional Information'. In the 'Additional Information' section, the 'Critical Date (CD)' field is highlighted with a red circle and contains the date '8/15/2015'. Below this are fields for 'Policy Number' (00066222778MT) and several checkboxes for 'LL To Be Additional Insured', 'Right To Self Insure', and 'LL Requires Certificate', all of which are checked. At the bottom, there is a table for 'Liability Type' with two entries: 'Property Damage' for \$1,000,000.00 and 'Workmans Comp' for \$2,000,000.00. A 'Subform Comments' section is at the bottom, and navigation buttons for 'Delete', 'OK', and 'Cancel' are at the very bottom.

Primary Contact	Name	Title	Direct Phone	E-mail	View
<input checked="" type="checkbox"/>	Andy Schultz	Managing Director	203-787-8765	aschultz@travelers.com	View
<input type="checkbox"/>	Terry Greiser	VP	203-787-8765		View

Liability Type	Amount	Delete
1. Property Damage	\$1,000,000.00	Delete
2. Workmans Comp	\$2,000,000.00	Delete

Landlord TI Owed Dates

20) Landlord TI Owed Reminder Date

21) Landlord TI Owed End Date

If you have a “Use it or lose it” clause where the landlord agrees to give you \$40 per SF as a TI contribution but you have to collect it all by 4/30/2018 or lose it, this is where you will enter the dates for this clause.

This screen also allows you to track the total amount owed by the landlord, how much they have already paid you and what the remaining balance is.

Landlord TI Details ? View Help

TI Code #

	RSF Amount	Aggregate Amount
Landlord Contribution (A)	\$40.00	\$1,000,000.00
Amount Paid (B)	\$10.64	\$265,987.32
Balance Due (A - B)	\$29.36	\$734,012.68

Landlord TI Critical Dates

Landlord TI Owed End Date (CD)

Landlord TI Owed Reminder Date (CD)

Payments

+ Add New Amount Received

	Date Received	Amount Received Aggregate	Amount Received PSF	Landlord Cash Contribution - Subform Comments	
1.	3/13/2017	\$265,987.32	\$10.64	Invoice #1546	<input type="button" value="Delete"/>

Totals

Additional Clause Dates

22) Additional clause reminder date

23) Additional clause active date

The additional clause screen allows you to enter any additional clause you want. You can name each additional clause anything you want. If the clause has critical dates, you can enter a reminder date and a critical date on this screen.

Additional Clause Details [View Help for This Screen](#)

Page #

Name of Clause *

Critical Date (CD)

Reminder Date (CD)

Additional Clauses Comments

The warranty on the roof expires on 8/31/2017. Get roof checked to make sure no repairs are necessary before the warranty expires.

Manual Critical Dates

24) Manual critical date

ProLease allows you to manually enter any critical date of your choice. To enter a manual critical date, on any data entry screen, click on the VIEW menu, then click on “Add a manual critical date”. You will now be at the following screen:

The screenshot shows a web form titled "Lease Admin Manual Critical Date". The form is contained within a grey-bordered window. At the top is a yellow header bar with the title in bold black text. Below the header, there are three input fields arranged vertically. The first is labeled "Critical Date (CD) *" and is empty. The second is labeled "Action *" and is empty. The third is labeled "Associated Property / Lease" and is a dropdown menu with a small downward arrow on the right. Below these fields is a large, empty text area labeled "Comments". At the bottom of the form, there are four buttons: "Open Property", "Delete", "OK", and "Cancel". The "OK" button is highlighted in yellow.

You can enter any critical date, label it as any Action you want, associate it with any property in ProLease (or don't associate it with a property) and add comments explaining this date.

Owned Property Expense End Dates

25) Owned property expense end date reminder

26) Owned property expense end date

When you create an owned property, you have to enter a start & end date for expenses. You will NOT be able to enter expenses outside of this term. These dates will let you know when you are getting near or at the end of that term.

The image shows a screenshot of a software interface titled "2. General Purchase Info". The form contains several input fields and a dropdown menu. The fields are: "Land Purchase Date" (2/13/1998), "Building Purchase Date" (2/13/1998), "Move in Date" (4/20/1998), "Status *" (Active (Active) with a dropdown arrow), "Start Date for Expenses *" (2/1/2000), and "End Date for Expenses (CD) *" (1/31/2020). A red oval is drawn around the "End Date for Expenses (CD) *" field and its value.

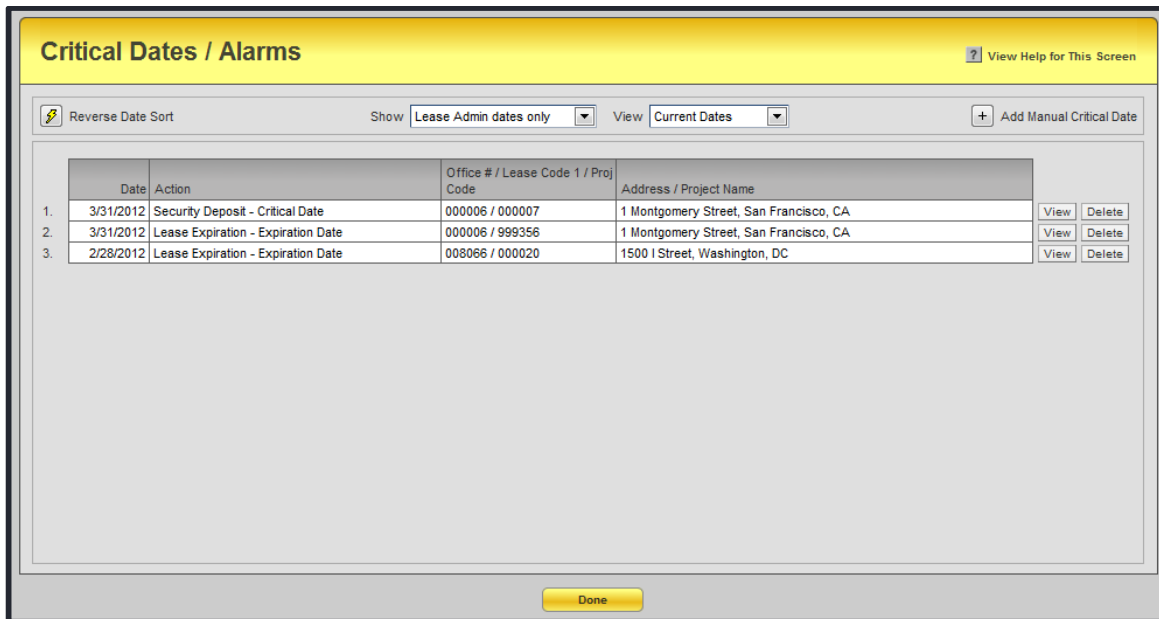
Land Purchase Date	2/13/1998
Building Purchase Date	2/13/1998
Move in Date	4/20/1998
Status *	M Active (Active) ▼
Start Date for Expenses *	2/1/2000
End Date for Expenses (CD) *	1/31/2020

How ProLease Alerts you to Critical Dates

ProLease alerts you to critical dates in 3 ways:

- 1 - Critical date alarm screen in ProLease
- 2 - E-mail alerts
- 3 - Critical date reports

Critical Date Alarm Screen

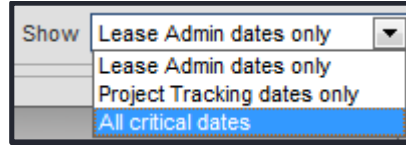


There are three ways you can get to the critical date alarm screen:

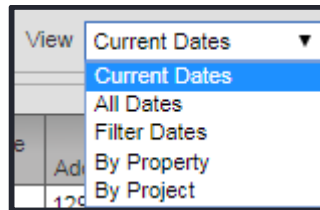
- 1) You can set your login to automatically boot up to this screen each time you log in to ProLease.
- 2) From the ProLease Main Menu click on:
 - Global Settings
 - 3) View Critical Dates / Alarms
- 3) From any data entry screen, in the menu bar, click on:
 - View Menu
 - View Critical Date / Alarm Screen

Once you are on the critical date alarm screen, you can filter it to show different dates. There are two drop down boxes at the top of the screen labeled “Show” and “View”.

The “Show” menu below is self-explanatory.



The “View” menu below has 5 choices:



-Current Dates - Defined as all critical dates today or before today.

-All Dates – Shows you every critical date in the database

-Filter Dates – Allows you to enter a “From” & “To” date and ProLease will show you all the critical dates between those two dates.

-By Property – Allows you to select a single property and ProLease will show you all the critical dates in that property.

-By Project - Allows you to select a single project and ProLease will show you all the critical dates in that project.

E-Mail Alerts

Every night ProLease sends out e-mail alerts for every critical date in the database. You can have e-mails sent out to anybody in the world regardless of whether or not they have access to ProLease. There are two types of E-mail alerts:

- Global e-mail alerts
- Local e-mail alerts

Global e-mail alerts – These are for anybody that has a login to ProLease. When you set up a login, you can go to the preferences section and add that person to the global e-mail list. They will automatically get e-mails for every property that their login allows them access to. In addition, you can specify which dates they should get e-mails for. For example, you might want a person to receive e-mails about lease expiration dates and renewal options but not security deposit dates or insurance dates.

Local e-mail alerts – Local e-mail alerts are for people that do not have a login to ProLease. Suppose you want the office manager to get e-mail alerts but they do not have access to ProLease. You can put them on the local e-mail list and they will get e-mail alerts.

To add a person to the local e-mail alerts, you have to go into that property and go to the E-mail alerts screen (shown below) and add the person to the local e-mail alert list.

41. E-Mail Reminders View Help for This Screen

View Critical Dates In This Lease

▶ **Global E-Mail Reminder List (For people that have a log in to ProLease)**
People listed here get e-mail reminders for all properties they have access to. To edit this list, go to Global E-mail alerts in the Preferences section.

	Name	E-Mail	Reminders
1.	Gary Davis	gdavis@aol.com	All Dates
2.	Aaron Brockett	aaronbrockett@charondevelopment.com	All Dates
3.	Herman Maier	hmaier@bushell.com	Expire, Renew, Cancel, Expand, Contract, Sec Deposit
4.	Mary Black	mblack@bushell.com	Expire

▶ **Local E-Mail Reminder List (For people that do NOT have a log in to ProLease)** + Add New Recipient
People added to this list will receive e-mail reminders for this lease ONLY.

	Name	E-Mail	Reminders	
1.	Steve Crimmin	scrimmin@bushellpublishing.com	All Dates	View

Go to 41. E-Mail Reminders Back New Search Search Results Reports Main Menu

Critical Date Reports

ProLease has a number of critical date reports. If you go to the ProLease standard reports screen, you will see the following:

Report Category	Report Title	Filter
Abstract	01. Lease Abstract	Filter
Abstract	02. Owned Abstract	Filter
Critical Dates	03. Critical Dates by Date	Filter
Critical Dates	04. Critical Dates by Action	Filter
Critical Dates	05. Critical Dates - Expense Deviation	Filter
Critical Dates	06. Critical Dates - Rentable Area Deviation	Filter
Critical Dates	07. Options	Filter
Critical Dates	08. Renewal / Cancel Options and Current Expenses	Filter
Critical Dates	09. Lease Summary Report	Filter
Miscellaneous	10. All Active Properties	Filter
Miscellaneous	11. All Leases	Filter
Miscellaneous	12. All Subspaces	Filter
Miscellaneous	13. Inventory Report	Filter
Miscellaneous	14. All Leases Direct With Landlord	Filter
Miscellaneous	15. All Leases We Sublease From Another Tenant	Filter
Miscellaneous	16. Our Subtenants	Filter
Miscellaneous	17. Annual Subspace Rentable Area Expirations	Filter
Miscellaneous	18. Annual Subspace Rentable Area Expirations by Cost Center	Filter
Miscellaneous	19. Annual Subspace Rentable Area Expirations by Company in Occupancy	Filter
Miscellaneous	20. Subspace Expirations	Filter

Report Category	Report Title	Filter
Expenses - Multi Year	21. Remaining Liability 5 Year	Filter
Expenses - Multi Year	22. Remaining Liability 5 Year Detail	Filter
Expenses - Multi Year	23. Remaining Liability 5 Year by Cost Center	Filter
Expenses - Multi Year	24. Remaining Liability 5 Year by Company In Occupancy	Filter
Expenses - Multi Year	25. Remaining Liability 10 Year	Filter
Expenses - Multi Year	26. Remaining Liability 10 Year Detail	Filter
Expenses - Multi Year	27. Remaining Liability Per RSF - 5 Year	Filter
Expenses - Multi Year	28. Remaining Liability Per RSF - 5 Year Detail	Filter
Expenses - Multi Year	29. Remaining Liability Minus Subtenant Income	Filter
Expenses - Monthly	30. Subtenant Invoices	Filter
Expenses - Monthly	31. Monthly Expenses for Any 12 Month Period	Filter
Expenses - Monthly	32. Monthly Expenses for Any 12 Month Period Detail	Filter
Expenses - Monthly	33. Monthly Expenses for Any 12 Month Period by Cost Center	Filter
Expenses - Monthly	34. Monthly Expenses for 1 Month Agg & PSF	Filter
Expenses - Monthly	35. Monthly Expenses for 1 Month Agg & PSF Detail	Filter
Expenses - Monthly	36. Monthly Expenses for 1 Month Agg & PSF By Cost Center	Filter
Expenses - Annual	37. Annual Expenses for Any 12 Month Period	Filter
Expenses - Annual	38. Annual Expenses for Any 12 Month Period Detail	Filter
Expenses - Quarterly	39. Quarterly Expenses for Any 12 Month Period	Filter
Expenses - Quarterly	40. Quarterly Expenses for Any 12 Month Period Detail	Filter

Report Category	Report Title	
Expenses - Monthly	41. Payment Schedule	Filter
Expenses - Monthly	42. Subtenant Income Schedule	Filter
Expenses	43. Amounts Associated With Pay To Companies	Filter
Expenses - Cumulative Total	44. Leased Line Item Totals	Filter
Expenses - Cumulative Total	45. Owned Line Item Totals	Filter
Expenses - Multi Year	46. Fixed Rent Expense Detail (Not Straight Line)	Filter
OLD Straight Line Rent Calc	47. OLD - Straight Line Rent - Annual Detail	Filter
OLD Straight Line Rent Calc	48. OLD - Straight Line Rent - Annual	Filter
OLD Straight Line Rent Calc	49. OLD - Straight Line Rent - Monthly Detail	Filter
OLD Straight Line Rent Calc	50. OLD - Straight Line Rent - Monthly	Filter
OLD Straight Line Rent Calc	51. OLD - 1 Month Straight Line Cumulative Differential	Filter
Expenses - Monthly	52. Free Rent Detail	Filter
Expenses - Annual	53. Cost Center Expenses by Subspace 1 Year	Filter
Expenses - Multi Year	54. Cost Center Expenses by Subspace 5 Year	Filter
Expenses	55. All Expenses	Filter
Expenses	56. Monthly Projections and Variable Base Amounts Comments	Filter
NEW Straight Line Rent Calc	57. 5 Year & Up Straight Line Rent Report Non-Detail	Filter
NEW Straight Line Rent Calc	58. 5 Year & Up Straight Line Rent Report Detail	Filter
NEW Straight Line Rent Calc	59. 10 Year & Up Straight Line Rent Report Non-Detail	Filter
NEW Straight Line Rent Calc	60. 10 Year & Up Straight Line Rent Report Detail	Filter

Report Category	Report Title	
NEW Straight Line Rent Calc	61. 12 Month Straight Line Rent Report Non-Detail	Filter
NEW Straight Line Rent Calc	62. 12 Month Straight Line Rent Report Detail	Filter
NEW Straight Line Rent Calc	63. 1 Month Straight Line Rent Report Non-Detail	Filter
NEW Straight Line Rent Calc	64. 1 Month Straight Line Rent Report Detail	Filter
NEW Straight Line Rent Calc	65. S/L Schedules Where Data Has Been Changed After The Final Import Was Done	Filter
NEW Straight Line Rent Calc	66. S/L Schedule Segments Where the Final Import Needs to be Run	Filter
Capitalization	67. Portfolio Compiled Monthly Schedule	Filter
Capitalization	68. Portfolio Compiled Subtenant Amortization Schedule	Filter
Capitalization	69. Portfolio 5 Year Lease Financial Statement	Filter
Capitalization	70. Portfolio 10 Year Lease Financial Statement	Filter
Capitalization	71. Portfolio Reconciliation Report	Filter
Capitalization	72. Portfolio 1 Month Report	Filter
Capitalization	73. Portfolio Cost Center Proportionate Share	Filter
Capitalization	74. Subspaces Associated with (and NOT with) a Capitalization Schedule	Filter
Capitalization	75. List of Capitalization Schedules	Filter
Capitalization	76. Cap Schedules Where Data Has Been Changed After The Final Import Was Done	Filter
Capitalization	77. Cap Schedule Segments Where the Final Import Needs to be Run	Filter
Capitalization	78. Lease Classification Tests	New Report! Filter
Capitalization	79. Lease Classification Tests Where the Final Import Needs to be Run	New Report! Filter
Capitalization	80. Lease Classification Tests That Have No Capitalization Schedule Associated With It	New Report! Filter

Report Category	Report Title	
Capitalization	81. Capitalization Schedules That Have No Lease Classification Tests Associated With It	Filter
Maintenance	82. Properties With Expenses Marked Information Only	Filter
Maintenance	83. Landlords / Sublandlords with Cash Contribution (TI) Balance Due	Filter
Maintenance	84. Our Subtenants with Cash Contribution (TI) Still Owed	Filter
Maintenance	85. Expired Leases Still Active	Filter
Maintenance	86. Expired Leases With Unrefunded Security Deposits	Filter
Maintenance	87. Subspaces With No Matching Lease Commence or Expire Dates	Filter
Maintenance	88. All Companies in Phone Book That Are Not Being Used	Filter
Maintenance	89. Future Critical Dates In Inactive Properties	Filter
Maintenance	90. Active Subtenants in Inactive Properties	Filter
Maintenance	91. All Expenses with No Pay To Company	Filter
Maintenance	92. All Properties with No Company In Occupancy	Filter
Miscellaneous	93. Leases With Security Deposit	Filter
Miscellaneous	94. Cost Centers	Filter
Miscellaneous	95. Key Metrics	Filter
Miscellaneous	96. Key Metrics - Headcount by Cost Center	Filter
Miscellaneous	97. Key Metrics - Capacity by Cost Center	Filter
Miscellaneous	98. Headcount / Capacity	Filter
Miscellaneous	99. Companies in Occupancy	Filter
Miscellaneous	100. All of Our Brokers	Filter


Report Category	Report Title	
Miscellaneous	101. Tenant Cash / Capital Expense Contributions	Filter
Miscellaneous	102. Approval Names	Filter
Miscellaneous	103. All Companies in Phone Book	Filter
Miscellaneous	104. All Contacts in Phone Book	Filter
Miscellaneous	105. See Where All Companies in Phone Book Are Being Used	Filter
Miscellaneous	106. Companies Listed on Vendors Screen	Filter
Miscellaneous	107. Landlords / Sublandlords	Filter
Miscellaneous	108. Property Personnel (In House Contacts, Landlords, Leasing Agents, Managing Agents)	Filter
Miscellaneous	109. Inactive Leases	Filter
Miscellaneous	110. All Properties One Line	Filter
Miscellaneous	111. Primary Use	Filter
Miscellaneous	112. Amendments	Filter
Miscellaneous	113. Additional Clauses	Filter
Miscellaneous	114. Email Alerts	Filter
Miscellaneous	115. Documents	Filter
Miscellaneous	116. Maintenance and Repair Items	Filter
Miscellaneous	117. Tenant Sends Notices To / Legal Notifications	Filter
Miscellaneous	118. Sublessor Sends Notices To / Legal Notifications	Filter
Miscellaneous	119. Foreign Exchange (FX) Rates	Filter
Miscellaneous	120. Pay To Companies	Filter

Report Category	Report Title	
Miscellaneous	120. Pay To Companies	Filter
Miscellaneous	121. Phone Book	Filter
Miscellaneous	122. Asset Replacement Value	Filter
Miscellaneous	123. Audit Trail	Filter
Miscellaneous	124. Portfolio Summary	Filter
Miscellaneous	125. Activities	Filter
Retail - Sales Info	126. Retail % Rents - Annual Sales Info	Filter
Retail - Sales Info	127. Retail % Rents - Monthly Sales 1 Month	Filter
Retail - Sales Info	128. Annual Net Sales for Any 12 Month Period	Filter
Retail - Sales Info	129. Annual Gross & Net Sales for Any 12 Month Period Detail	Filter
Retail - Sales Info	130. Monthly Net Sales for Any 12 Month Period	Filter
Retail - Sales Info	131. Monthly Sales for Any 12 Month Period Detail	Filter
Retail - Sales Info	132. Annual Net Sales 5 Year	Filter
Retail - Sales Info	133. Annual Sales 5 Year Detail	Filter
Retail - Sales Info	134. Annual Net Sales 10 Year	Filter
Retail - Sales Info	135. Annual Sales 10 Year Detail	Filter
Retail - Sales Info	136. Retail Sales Info - Gross & Net Sales - One line Only	Filter
Retail - Sales Info	137. Landlord - Monthly & YTD Sales (Emailable and Archivable)	Filter
Retail - Sales Info	138. Monthly Sales Report Delivery Method	Filter
Retail - Sales Info	139. Breakpoint Report	Filter

As of the writing of this document (9/6/2017), there are 139 standard reports that you can run. All the reports get broken down into 1 of 7 different report categories.

- 1) Abstract
- 2) Critical Dates
- 3) Miscellaneous
- 4) Expenses
- 5) Capitalization
- 6) Miscellaneous
- 7) Retail – Sales info (For retailers)

Reports 3-9 are critical date reports. Below is an example of the critical dates by date report.

Filtering: Lease Category = All Our Locations (Leased and Owned) And Ls Expiration >=9/6/2017 And Ls Status = Active And From = 9/6/2017 Sorted by: Critical Date Action Name Lease Rentable Area DESC Shows Home Amounts Only FYI: IMPORTANT - If the word 'Deleted' appears under any critical date no emails will be sent out for that date / Only options that have at least a reminder date will be included in this report / Options with no dates will not be included in this report / The Rentable Area field shows the total Rentable Area BEFORE any subtenants You can type any default comment to appear on all reports in the preferences section of the global settings. You can also change the comment for just this report on this report's filter screen.								
Bushell Industries			03. Critical Dates by Date - 9/6/2017 And Up					
318 Critical Dates			Run Date: 9/6/2017					
#	Critical Date	Action Name	Property Address	Lease Codes	Lease Type	Lease Rentable Area	Lease Term	Person Responsible
1	9/30/2017	Lease Expiration Date	2525 West 190th Street Torrance, CA 90504-8099 United States 000017 Bushell Publishing Corp	000028	Direct w/ LL	26,541.00 SF	7/12/2001 to 9/30/2017 16 years 2.65 months	
2	10/2/2017	Subspace Expiration Reminder Date	11075 Santa Monica Blvd Los Angeles, CA 90025 United States 250346 Bushell Industries, Inc.	3186-L-A0554	Direct w/ LL	22,665.00 SF	5/24/2011 to 3/31/2023 11 years 10.26 months **Mult exp date**	
3	10/2/2017	Subspace Expiration Reminder Date	11075 Santa Monica Blvd Los Angeles, CA 90025 United States 250346 Bushell Industries, Inc.	3186-L-A0554	Direct w/ LL	22,665.00 SF	5/24/2011 to 3/31/2023 11 years 10.26 months **Mult exp date**	
4	11/1/2017	Landlord TI Owed Reminder Date	1201 Edwards Mill Road Raleigh, NC 27607 United States 000012 Bushell Publishing, Inc.	000019	Direct w/ LL	25,000.00 SF	2/1/1998 to 1/31/2023 25 years 0 months	

Deleting Critical Dates

The critical date system is exactly that. It is a system. And, like any other system, it needs to be managed. For example, when you exercise a renewal option, think about the flow of events.

Let's assume that your current lease expires on 2/28/2019. Suppose we had a renewal option that had the following 3 critical dates:

-Reminder Date	8/1/2017
-Landlord Notify Date	2/28/2018
-Active Date	3/1/2019

You are telling ProLease, you want to be reminded about this option on 8/1/2017 so that you can start to discuss it and figure out what you are going to be doing.

You have to notify the landlord of your intention to exercise this option no later than 2/28/2018.

The first day of the new option term will be 3/1/2019.

All 3 of these dates in ProLease are considered critical dates meaning that an e-mail will go out on each date to whoever is set up to receive e-mail alerts for this property.

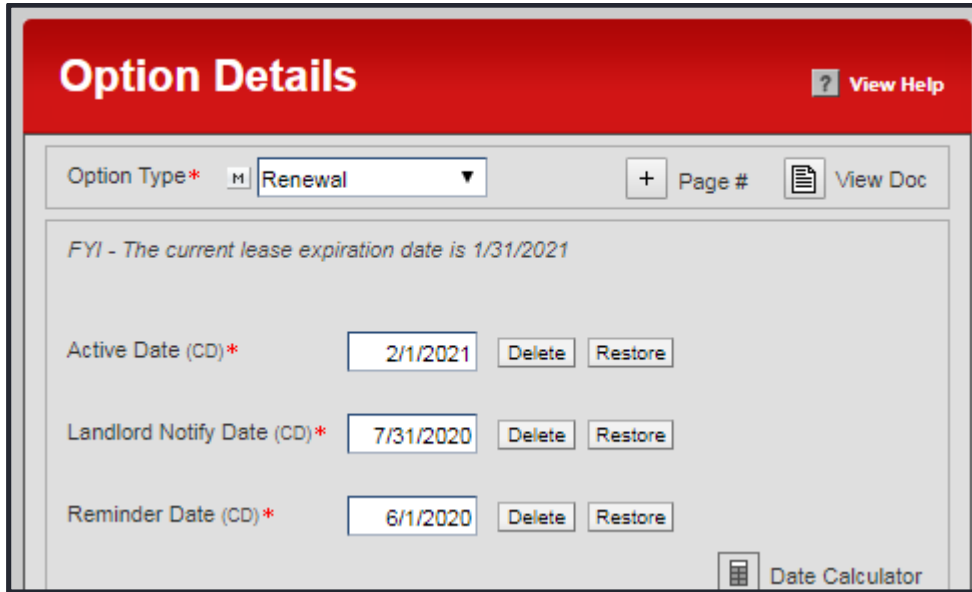
Now suppose today is 12/1/2017. You have been negotiating with the landlord to renew your lease and sometime in December 2017 you actually sign the renewal. It's a done deal and you no longer have to worry about this space for another 5 years.

On 2/28/2018 an e-mail is going to go out saying warning, today is the landlord notify date for this renewal option. People will start calling you saying, "Why am I getting this e-mail"? I thought you said we already renewed." You will clearly hear the panic in their voice.

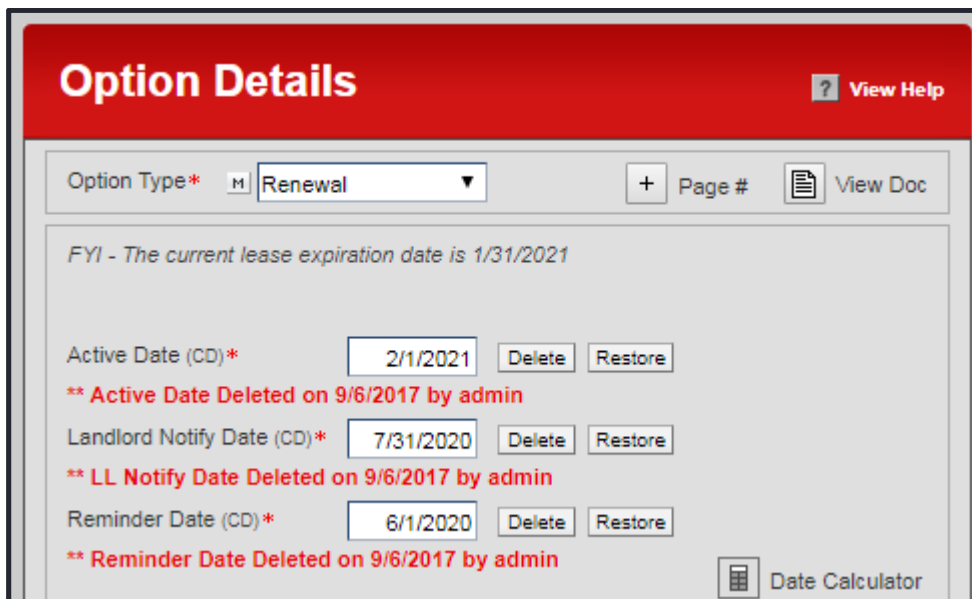
My point is this, when you actually renew (or decline to renew) you must delete any future critical dates from the critical date system. This way no e-mail alerts will go out for those dates and you will save a lot of people a lot of aggravation.

To delete a critical date out of ProLease

On any screen that has a critical date, you will see two buttons next to each critical date labeled “Delete” & “Restore”.



To delete any date out of the critical date system, click on the “Delete” button. You will now see a red prompt appear as shown below. I clicked on all 3 delete buttons to delete all 3 dates. ProLease tells you when the date was deleted as well as who deleted the date (I am the admin so that is me).



As you can see the dates still appear on the screen. You are NOT deleting the dates out of ProLease. You are just deleting them out of the critical date system.

IMPORTANT – Any time you see a red prompt next to a critical date, that means the date has been deleted and no e-mails will be sent out for that date.

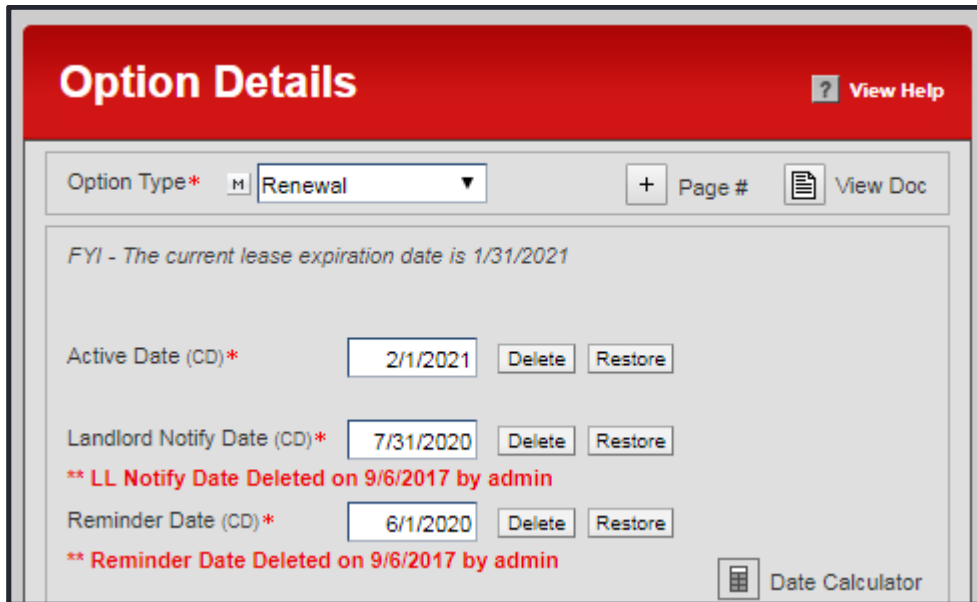
When you run a critical date report, this is what you will see:

Bushell Industries		03. Critical Dates by Date - 2/1/2021 And Up				ABC Co		
3 Critical Dates		Run Date: 9/6/2017						
#	Critical Date	Action Name	Property Address	Lease Codes	Lease Type	Lease Rentable Area	Lease Term	Person Responsible
1	2/1/2021 **Deleted**	Renewal Option Active Date	350 5th Avenue New York, NY 10022 United States 000127 Bushell Industries, Inc.	05098	Direct w/ LL	25,000.00 SF	11/1/2010 to 1/31/2021 10 years 3.00 months **Month to Month**	Alan Bushell

Notice the ****Deleted**** prompt under the date. That is letting you know this date has been deleted from the critical date alarm system and no e-mail alerts will be going out for this date.

To restore a deleted critical date

If you accidentally delete a date that you do not mean to delete, simply click on the “Restore” button next to that date and the red prompt will disappear. On the screen shot below, I clicked on the Restore button for the Active Date and you can see that the red prompt disappeared so that date is now back in the critical date alarm system and e-mails will be going out for that date.



UPLOADING DOCUMENTS

In all properties, projects and equipment leases, ProLease gives you the ability to upload an unlimited number of documents. To upload, or view a document, go to the Documents screen.

43. Documents View Help

+ Add New Document Filter By Document Type ▼

	Date Uploaded	Uploaded By	Document Type	Description	File Name		
1.	12/2/2007	abushell	Lease Document	Master Lease - Expires 1/31/2021	Lease.pdf	Launch	View Details
2.	12/2/2007	abushell	Floorplan	Entire 23rd Floor	Floorplan1fullsize.pdf	Launch	View Details
3.	12/2/2007	abushell	Building Website	350 5th Avenue website	www.empirestatebuilding.com	Launch	View Details
4.	9/29/2008	abushell	Photo for Mapping (Hard coded)	Photo that appears on mapping	Empire State Bldg10.jpg	Launch	View Details
5.	7/5/2017	plmaster	Security Deposit Check	First & Last Months rent	Test PDF 6-16-2017.pdf	Launch	View Details
6.	10/30/2009	plmaster	Photo for Abstract (Hard coded)	Photo that appears on abstract	Empire State Bldg 3.jpg	Launch	View Details

Documents - Main Screen Comments View More Comments

Go to 43. Documents Back Next New Search Search Results Reports Main Menu

To view a document listed on this screen, click on the “Launch” button located to the right of the document name.

To upload a new document, click on the button labeled “Add New Document”. The rest should be self-explanatory.

MAPPING

ProLease has an awesome mapping function that will map all of your properties. There are 6 fields that ProLease uses to map your properties. They are:

- Address 1
- City
- State
- Zip
- Country
- County

All of these fields are on the General Property Info screen.

1. General Property Info

Property Information Delete This Property

Measurement * Currency *

Address 1 *
Address 2

Property Name

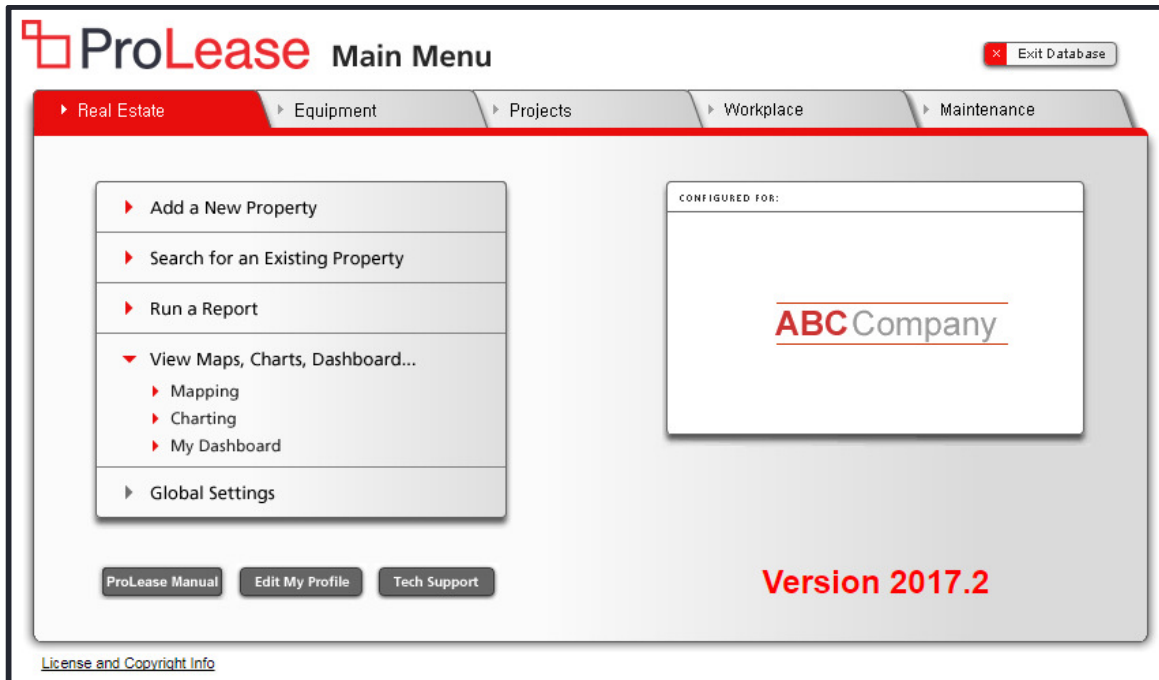
City State / Prv
Zip County
Country Region
Main Phone Suite

	Name	Property Code
Prop Code 1 *	<input type="text" value="Location ID"/>	<input type="text" value="000127"/>
Prop Code 2	<input type="text" value="Property Code 2"/>	<input type="text"/>
Prop Code 3	<input type="text" value="Manager"/> <input type="text" value="M"/>	<input type="text" value="Alan Bushell"/>
Prop Code 4	<input type="text" value="Property Code 4"/> <input type="text" value="M"/>	<input type="text"/>
Prop Code 5	<input type="text" value="Property Code 5"/> <input type="text" value="M"/>	<input type="text"/>

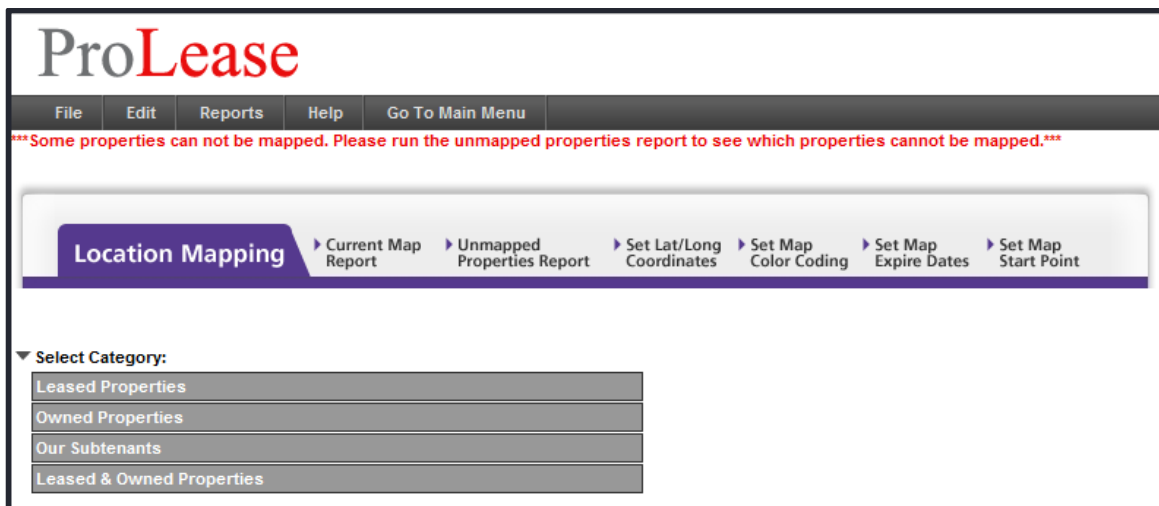
* = Mandatory Field View Map View Property Comments

You do not need to fill in all of these fields. Enter as many as you can and ProLease will automatically attempt to map the property. You can check to see if the property can be mapped while you are on the General Property Info screen. After you enter the data, on the bottom of the General Property Info screen there is a button labeled “View Map” (Circled above). Click on this button and make sure it mapped the property correctly.

To go to the “Mapping” section in ProLease, from the ProLease Main Menu, click on “View Maps, Charts, Dashboard”, then click on Mapping.



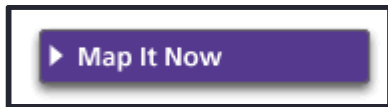
You will now be at the following screen:



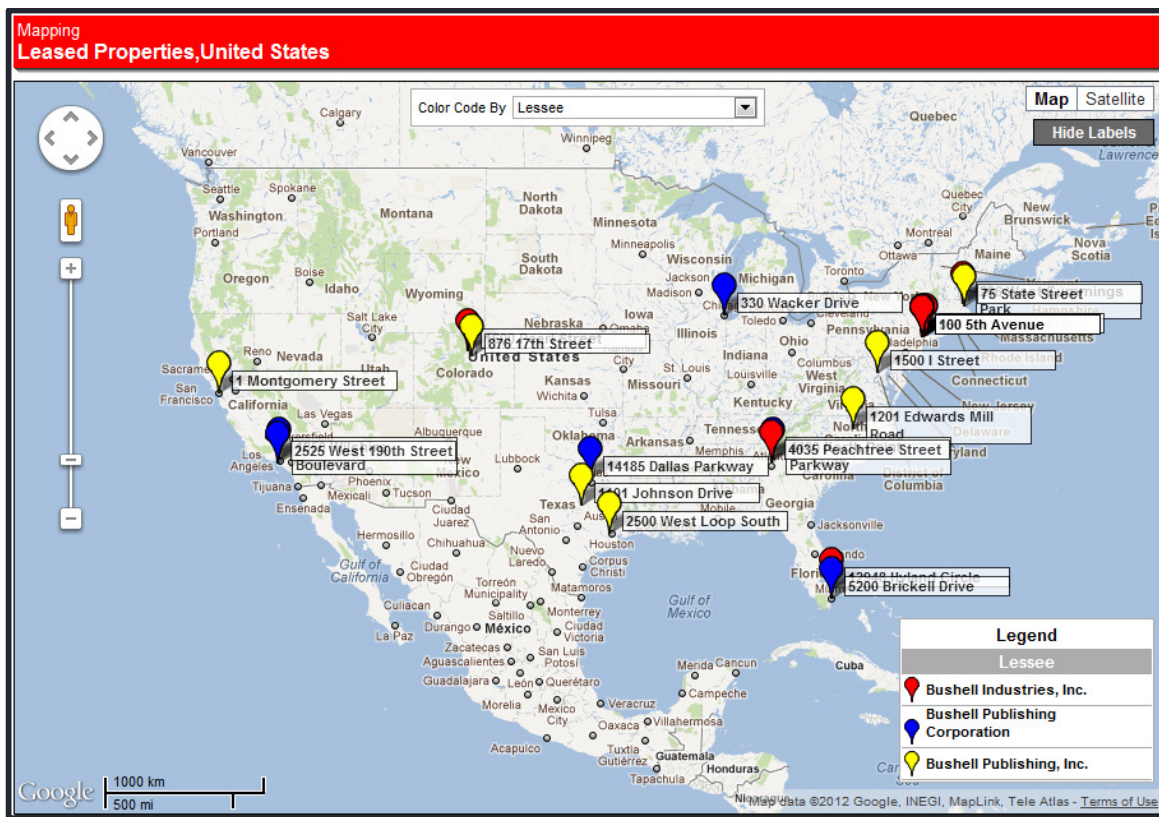
You can select any of the four categories to map:

- Leased properties only
- Owned properties only
- Our subtenants
- Leased & Owned properties

Once you click on one of these categories, you will be able to drill down geographically based on Country, Region, State, City, Property. In addition, the “Map it Now” button will appear.

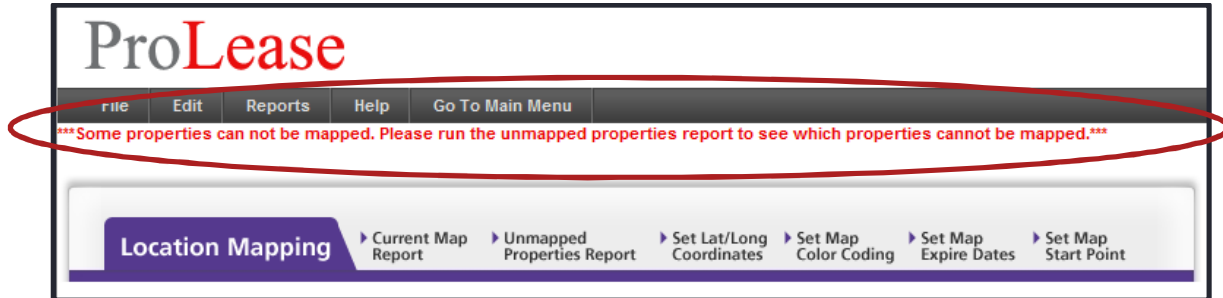


You can click this button at any time and it will map your locations based on where your geographic filtering is set at that moment.



You can color code the maps based on lots of different categories. You can change the colors used on the map. You can show the property labels or hide the labels.

If there are properties that cannot be mapped, ProLease will tell you on the screen shown below. You will see the red prompt at the top of the screen telling you that some properties cannot be mapped. If all your properties were mapped that prompt would be in black and it would say “All properties are mapped”.



ProLease gives you the ability to map the properties manually in two ways:

- 1) You can click on the tab labeled “Unmapped Properties Report”. This will run a report of all the unmapped properties and manually allow you to drag a dot to a specific place on the map and keep that position.
- 2) You can click on the tab labeled “Set Lat / Long Coordinates” and you will be able to enter the Lat / Long coordinates and ProLease will map the property at those coordinates.

PROPERTIES, LEASES & SUBSPACES

ProLease has a 3-level data hierarchy. The 3 levels are:

- 1) Property
- 2) Lease
- 3) Subspace

In a PROPERTY, you can have an unlimited number of LEASES.

In a LEASE, you can have an unlimited number of SUBSPACES.

IMPORTANT – In a leased PROPERTY, there must be at least one LEASE and one SUBSPACE in that property. When you create a new leased property, ProLease will automatically create the PROPERTY and in that property, it will automatically create one LEASE and one SUBSPACE. You can add an unlimited number of LEASES & SUBSPACES to that PROPERTY but you must always have at least one LEASE and one SUBSPACE in a leased PROPERTY.

IMPORTANT – In an owned property there is only a PROPERTY level. There is no lease or subspace level.

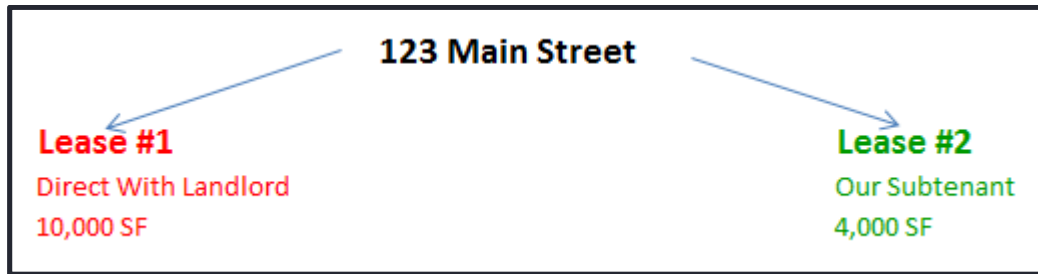
Understanding a PROPERTY

In ProLease, every record is a PROPERTY. If you have 100 properties in your portfolio, you will have 100 records in your ProLease database. Everything that happens in that property (multiple leases or multiple subspaces) will be entered into that one record.

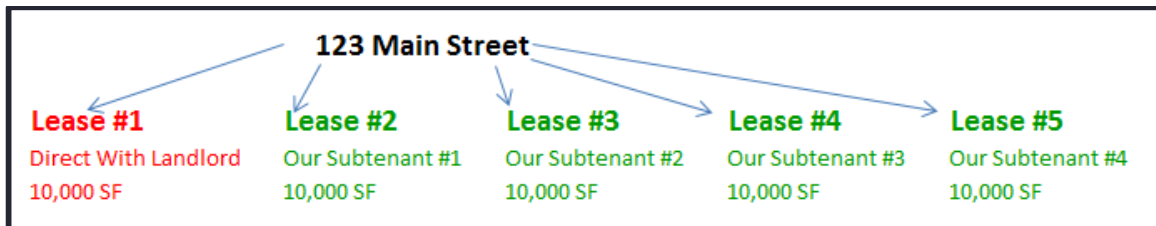
Understanding a LEASE

In a PROPERTY, you can have an unlimited number of LEASES. Here are three examples of when you might have multiple leases in a property.

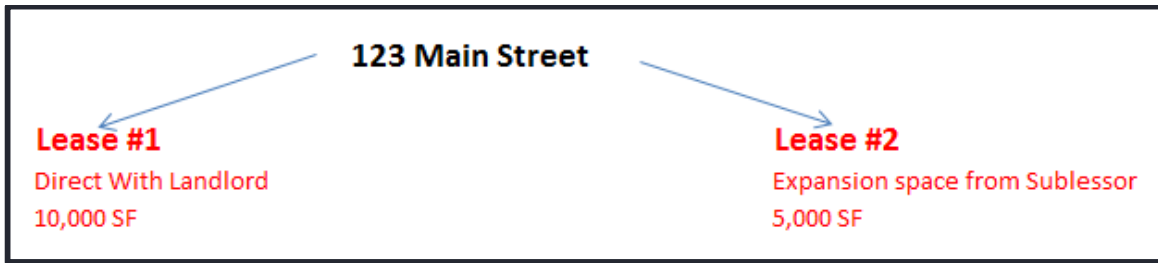
Scenario #1) Subtenant(s) – Suppose you sign a lease with a landlord for 10,000 SF of space. Midway through the term you decide you have too much space so you go out to the market and you find a subtenant to take 4,000 SF. You now have 2 leases in this property. Your lease with the landlord for 10,000 SF and your lease with a subtenant for 4,000 SF.



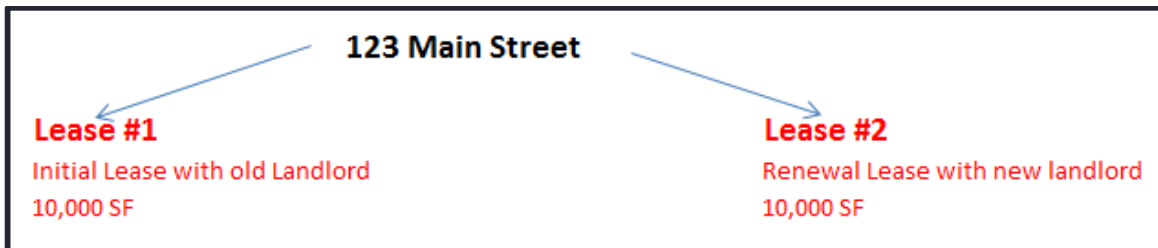
On a larger scale, suppose you leased 100,000 SF from a landlord. You planned to occupy 60,000 SF and use the rest as expansion space. So, you decide to sublet out the remaining 40,000 SF to 4 different subtenants (10,000 SF each). You would have 5 leases in this property. Your lease with the landlord for 100,000 SF and the 4 leases with the subtenants.



Scenario #2) Expansion space from a sublessor – Suppose you signed a lease for 10,000 SF and midway through the term you decide you need an additional 5,000 SF. You go to the landlord but he does not have any space to offer you. He tells you about another tenant in the building that is looking to sublet their space. You call them up and sign a lease with them. You now have two leases in this property. One lease with the landlord for the initial 10,000 SF and another with the sublessor for the additional 5,000 SF.



Scenario #3) New Landlord – Suppose you signed a lease for 10 years and in the middle of the term, the landlord sells the building. You finish out your 10-year term and you decide you want to renew. You approach the new landlord and he says he would love to have you renew but he wants you to sign his lease document. You would now have two leases in this property. One old lease that is expired (Inactive) and one new lease that is Active.



IMPORTANT SUMMARY – You can have an unlimited number of leases in a property. Lease can be between:

- You and a landlord
- You and a subtenant
- You and a sublessor

Understanding a Subspace

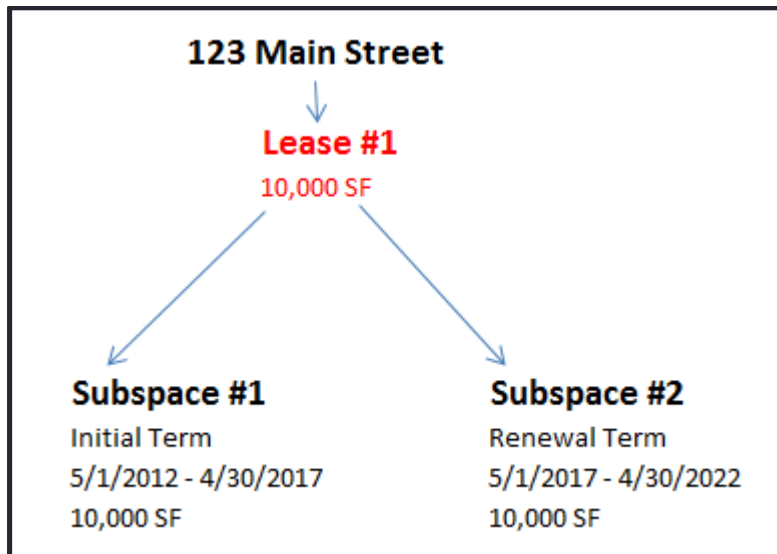
You can have an unlimited number of SUBSPACES in a LEASE.

EXTREMELY IMPORTANT – Do not confuse SUBSPACES and SUBTENANTS. They are completely different and have nothing to do with each other (other than the fact that they have the same prefix). Subspaces deal with pieces of space and expenses as described below.

A subspace allows you to track different pieces of space under the same lease as well as track the expenses for each piece of space under one lease.

Here are three examples of when you might have multiple subspaces in a lease:

Scenario #1) Renew a Lease – Anytime you renew an existing lease, you will create a new subspace. For example, suppose you had a 5-year lease that ran from 5/1/2012 – 4/30/2017. Now you want to renew for another 5-year term. You would create a second subspace that went from 5/1/2017 – 4/30/2022. This will allow you to keep all the existing expense information for the initial 5-year term in Subspace #1 and create all new expense info for the new 5-year renewal term in Subspace #2.



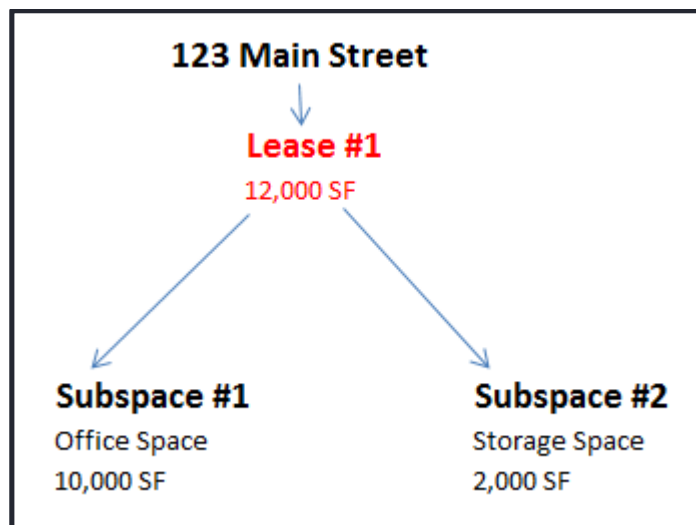
Scenario #2) Multiple Primary Uses in One Lease – Suppose you signed a lease for 12,000 SF but it was actually 10,000 SF of office space and 2,000 SF of Storage space. You would create two subspaces. One for the Office space and another for the Storage space. You have the ability to enter either:

- Different costs for the two pieces of space
- OR
- The same costs for both pieces of space

Both pieces of space can have either:

- Different commence & expire dates
- OR
- The same commence & expire dates

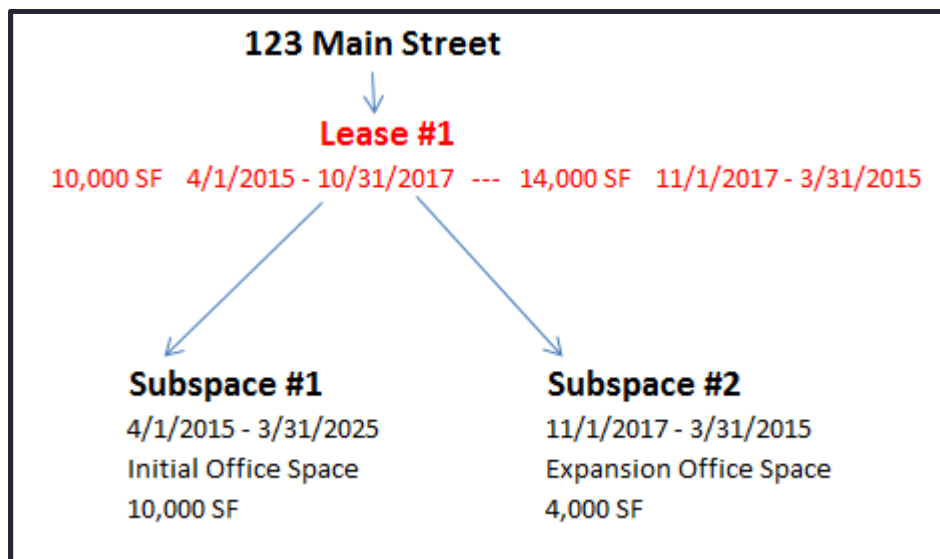
In addition, if you want to run a report on your office space only, it will only include the 10,000 SF of office space rather than both the office & storage space (12,000 SF total) in this property. Creating different subspaces for both primary uses will allow you to fine tune the filtering of your reports.



Scenario #3) Expansion Space from the Landlord – Suppose you signed a 10-year lease (4/1/2015 – 3/31/2025) for 10,000 SF and in the middle of the term you needed an additional 4,000 SF. You call the landlord and he has a beautiful 4,000 SF unit that would be perfect for you. You negotiate the financial terms for expansion space and agree to take possession of the expansion space on 11/1/2017.

IMPORTANT – You don't sign a new lease for the expansion space. You sign an amendment to the existing lease.

In this scenario, you would create a new subspace for the expansion space as shown below.



If you signed a new lease for this expansion space, you would NOT create a new subspace but rather create a new lease for the expansion space.

VERY, VERY, VERY IMPORTANT – You should understand that ProLease has a 3-tiered structure of data.

- 1) Property
- 2) Lease
- 3) Subspace

You understand that you can have an unlimited number of LEASES in a PROPERTY and you understand the three examples I gave you above about when you might have multiple LEASES in a PROPERTY.

You should also understand that you can have an unlimited number of SUBSPACES in a LEASE and you understand the three examples I gave you above about when you might have multiple SUBSPACES in a LEASE.

If you do not understand any of this, please go back and re-read this section. For you to use ProLease successfully, it is critical that you understand this data hierarchy. Even if you are not entering data and you are just running reports and looking up data, you still need to understand this concept. Reports can be run at either the PROPERTY level, LEASE level or SUBSPACE level so for you to be able to get the information you need out of ProLease, you must understand this concept.

Adding a new lease to an existing property

Suppose you have already created a property but you need to add a new lease to an existing property. You can add a new lease to an existing property in one of two ways:

- From the General Property Info screen
- From the General Lease Info screen

On both of these screens there is a button labeled “Add a New Lease”.

1. General Property Info ? View Help

Property Information Delete This Property

Measurement * Currency *

Address 1 *
 Address 2
 Property Name
 City State / Prv
 Zip County
 Country Region
 Main Phone Suite

All Leases In Property View Floor Info + Add a New Lease

Lease Type	Lessee / Subtenant	Commence	Expire	Today's RSF	
Direct w/ LL	Bushell Industries, Inc.	11/1/2010	1/31/2021	25,000.00	<input type="button" value="View"/>
Our Subtenant	Mission Health	8/1/2017	1/31/2021	4,000.00	<input type="button" value="View"/>

Our RSF Today Subtenant RSF Today Net RSF Today

13. General Lease Info Copy Info From Another Lease Select Another Lease ? View Help

+ Add New Lease / Subtenant Delete This Lease

Lessee
 Lease Type *

Lease Approval Info

Record Created By
 Date Created
 Date Lease Was Signed
 Lease Signed By Name
 Lease Signed By Title
 Deal Approved By
 Deal Approved By Title

Company Details

+ Add New Company

Company in Occupancy	% Occupied	
1. Golf Digest	10.00%	<input type="button" value="Delete"/>
2. Log Cabins Magazine	30.00%	<input type="button" value="Delete"/>
3. Ski Magazine	60.00%	<input type="button" value="Delete"/>

IMPORTANT – Even though the button label on the General Property Info screen only says, “Add a New Lease”, you can also add a subtenant lease. There is just not enough room to show the same label as what is on the General Lease Info screen.

You will also see there is a button labeled “Add a New Lease”. If you click this button, you will be taken to the following screen:

Add New Lease / Subtenant Mandatory Fields

► This lease is being added to 350 5th Avenue

Lease Type *

Lessee *

Primary Use *

Status *

Measurement Type *

RSF *

Currency Type *

Commence Date *

Expiration Date *

Earlier in this document we discussed adding a new property to ProLease. When you add a new property to the database, the first screen you need to fill in is the “Add New Property Mandatory Fields” screen. When you want to add a new lease to an existing property, the first screen you are going to need to fill in is the “Add New Lease / Subtenant Mandatory Fields” screen (Shown above).

These are the mandatory fields you must fill in to add a new lease to an existing property in ProLease. For purposes of this example, let’s assume we want to create a subtenant’s lease. The subtenant’s name is Sirius Industries. It is for 5,000 SF of Office space and the term is from 8/12/2009 – 1/31/2014. Here is what the filled in screen would look like.

Add New Lease / Subtenant Mandatory Fi...

▶ This lease is being added to 350 5th Avenue

Lease Type*

Lessee*

Primary Use*

Status*

Measurement Type*

RSF*

Currency Type*

Commence Date*

Expiration Date*

Once the above screen is filled in, you would click the OK button at the bottom and ProLease would create a second lease in this property. When it is done, it would take you to the General Lease Info screen for this new lease.

IMPORTANT – Remember, your leases (You Pay money) have a red bar at the top of the screen. Your subtenant leases (Income to you) have a green bar at the top of the screen.

If you were to go back to the General Property Info screen for this property and look at the “All Leases in Property” section and you will see there are now 2 leases in this property (see screen shot below). One lease that is direct with the landlord and another lease for a subtenant.

1. General Property Info ? View Help

Property Information Delete This Property

Measurement * Currency *

Address 1 *
Address 2

Property Name

City State / Prv
Zip County
Country Region
Main Phone Suite

All Leases In Property View Floor Info + Add a New Lease

Lease Type	Lessee / Covenant	Commence	Expire	Today's RSF	
Direct w/ LL	Bushell Industries, Inc.	11/1/2010	1/31/2021	25,000.00	View
Our Subtenant	Mission Health	8/1/2017	1/31/2021	4,000.00	View

Our RSF Today Subtenant RSF Today Net RSF Today

What Data is at the Property, Lease or Subspace level?

IMPORTANT – When you look at the Go To menu, you will see that every data entry screen has a data level of either Property, Lease or Subspace.

Go to:	Data Level
1 General Property Info	Property
2 Property Owner Company	Property
3 Leasing Agent Company	Property
4 Managing Agent Company	Property
5 Vendors	Property
6 Building Operation & HVAC Hours	Property
7 Property Level Custom Fields	Property
8 Projects & Assets Associated with Property	Property
9 Activities	Property
10 Straight Line Rent Calculation (New)	Property
11 Total Expenses In This Property	Property
12 Capitalization Schedules	Property
13 General Lease Info	Lease
14 Lease Term / Options	Lease
15 Rentable Area / Subspaces	Subspace
16 Base Rent	Subspace
17 Free Rent	Subspace
18 CPI & Percentage Increases	Subspace
19 Operating Expenses & CAM	Subspace
20 Real Estate Taxes	Subspace
21 Utility Costs	Subspace
22 Parking	Subspace
23 Additional Costs and Credits	Subspace
24 Management Fee	Subspace
25 Occupancy / Sales Tax	Subspace
26 Retail - % Rent	Subspace
27 Allocations	Subspace
28 Landlord TI / Tenant Contributions	Subspace
29 Subspace Level Custom Fields	Subspace
30 Tenant's Broker	Lease
31 Security Deposit	Lease
32 Insurance / Asset Replacement Cost	Lease
33 Sublease / Assignment Rights	Lease
34 Tenant Sends Official Notices To	Lease
35 Landlord Sends Official Notices To	Lease
36 Holdover Costs / Restoration	Lease
37 Amendments	Lease
38 LL Relocation / Audit Rights / Late Fees	Lease
39 Maintenance and Repair	Lease
40 Additional Clauses	Lease
41 Lease Level Custom Fields	Lease
42 Key Metrics	Lease
43 Documents	Lease
44 E-Mail Reminders	Lease

When you add a new lease to a property, what you are really doing is creating a duplicate set of lease level screens (#13-44) to this property. So, in a property that has two leases in it, there will be one set of screens 1-12 (property level screens) and two sets of screens 13-44 (lease level screens).

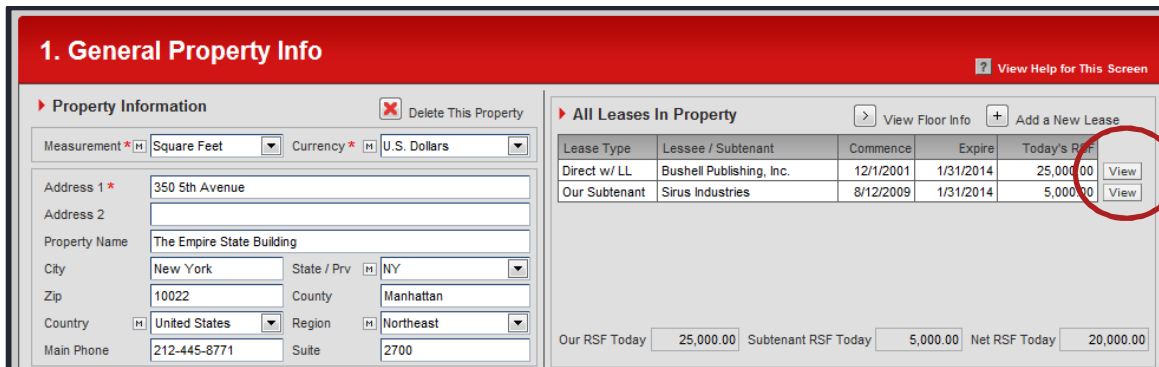
Don't worry about the Subspace screens right now. We will get to those later in this document. Suffice it to say that every time you add a new lease to an existing property, what you are really doing is creating a duplicate set of screens 13-44 to that property.

Navigating between multiple leases in one property

Previously in this document we discussed navigating around a property that only had one lease in it. Navigating around a property that has multiple leases in it is slightly different.

There are three ways you can navigate between multiple leases in a single property.

Method #1 - In the property below you can see that we have two leases. One that is our lease for 25,000 SF, Direct w/ LL and another lease for a subtenant (Sirus Industries) who has 5,000 SF.



This property has one set of property level screens (#1-12) and two sets of lease level screens (#13-44) one set for each lease. For purposes of this example, let's assume that I am on the General Property Info screen (#1) and I want to go to the base rent screen (#16). The issue is that there are two base rent screens. One for each of the two leases. If I click on the Go To menu and I click on "Base Rent", which base rent screen will it take me to? The one for the first lease or the one for the second lease?

ProLease will take you to the lease that was created first in this property. In the example above, it would be my 25,000 SF lease with the landlord (Red bar at top of screen). So, the question is, how do I go to the base rent screen for the subtenant lease? From the General Property Info screen, in the "All Leases in Property" section, you can click on the View button (Circled above) next to any lease and that will take you to the

General Lease Info screen for that lease. Once you are in that lease (On a lease level screen in that lease), you can click on any other lease level screen and it will take you to the screen for that lease.

Method #2) - From any data entry screen in ProLease, you can click on the Go To menu and select screen #13 - General Lease Info screen. If there are multiple leases in the property it will take you to the following screen which is a list of all the leases in this property. You can now select which lease you want to go to by either clicking on the View button to the right of any lease or double click on any field on this screen and you will go to the General Lease Info Screen for that lease:

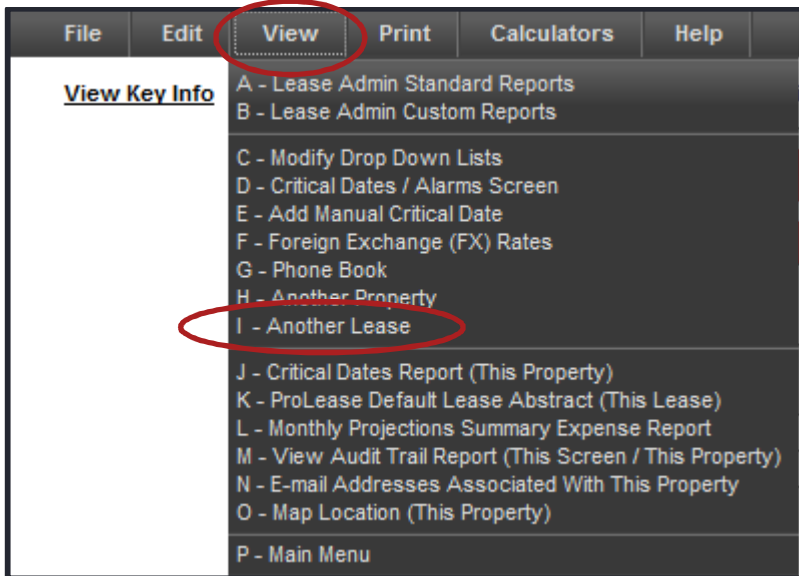
Select a Lease at 350 5th Avenue View Help for This Screen

+ Add New Lease or Subtenant

	Lease Code 1	Lease RSF	Lease Type	Primary Use	Lease Status	Floors	Lessee / Subtenant	
1.	88765	25,000.00	Direct w/ LL	Mixed	Has Expiration Date	Basement, Entire 27	Bushell Publishing, Inc.	View
2.	999368	5,000.00	Our Subtenant	Office	Has Expiration Date		Sirus Industries	View

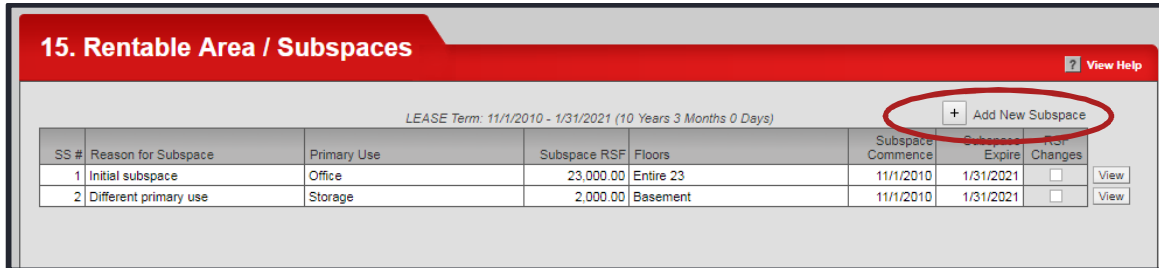
Select
Cancel

Method #3) – From any data entry screen, in the menu bar, you can click on the “View” menu, and click on “I – Another Lease” and it will take you to the list of leases shown above.

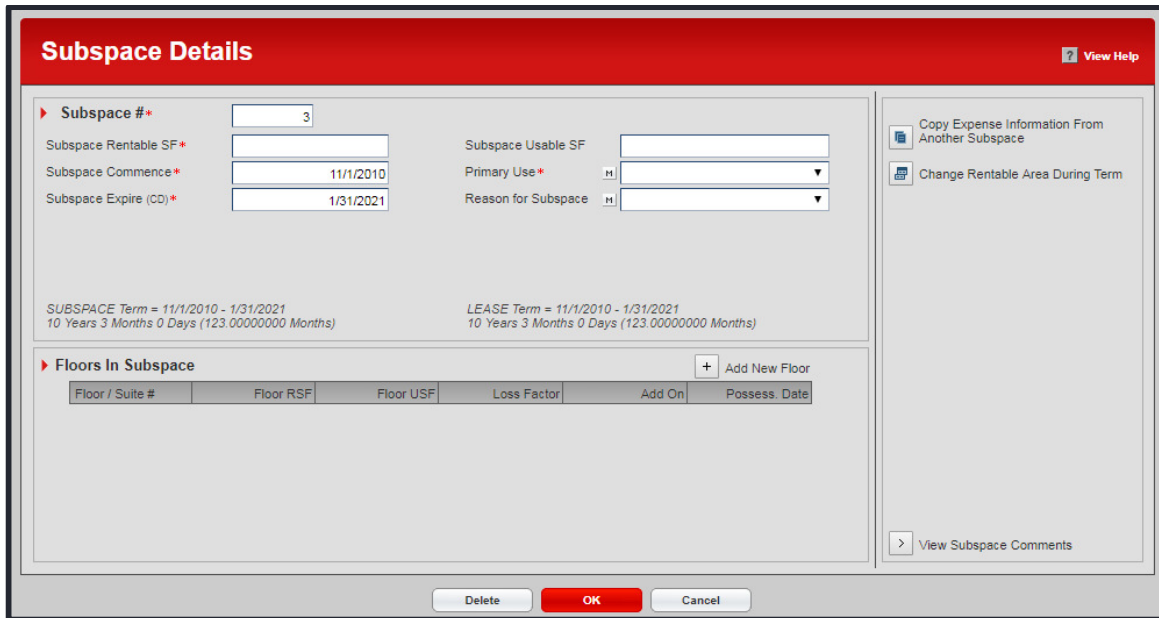


Adding a new subspace to an existing lease

There is only one screen where you can add a new subspace to an existing lease. That is on screen #12. Rentable Area / Subspaces screen (shown Below).



To add a new subspace to an existing lease, click on the button labeled “Add New Subspace” and you will be at the following screen:



Subspace # - This field will fill in automatically with a number. You can change it if you want but it must this is a number field. The first subspace in each lease will always be Subspace #1. The second subspace will always be subspace #2. Etc.

Subspace RSF – Enter the rentable area for this subspace.

Subspace Usable SF – This is an optional field. You can enter the usable area if you know it. No calculations are made on this field.

Subspace Commence / Expire – Enter the dates for this subspace. These fields will default to the lease commence & expire dates on the lease term screen but you can change them.

IMPORTANT – A SUBSPACE does not have to commence / expire on the LEASE commence / expire date. A SUBSPACE can commence / expire on any date however, a SUBSPACE cannot commence before the lease commencement date or expire after the LEASE expiration date. Think of the LEASE commence / expire dates as bookends. Nothing happens outside of those two dates. You can have SUBSPACES that commence and expire any time you want but a SUBSPACE cannot commence before the LEASE commencement date and a SUBSPACE cannot expire after the LEASE expiration date.

Primary Use – This is a modifiable drop-down box. You can enter any Primary use of your choice. Examples are:

- Office
- Retail
- Manufacturing
- Medical
- Warehouse
- Storage
- Lab Space
- Data Center

IMPORTANT – If you have multiple primary uses in this lease, you should be creating a different subspace for each primary use.

Reason for Subspace – This is a modifiable drop-down box. It's a good idea to always enter a reason for subspace so that it will be easy for other people to understand what the purpose (or reason for) this subspace is. This is nothing more than a label to help people understand why this subspace exists.

Floors in Subspace – You can enter all the floors that are included in this subspace in this section. Sample entries are:

- Suite 300
- Part 3rd floor
- Entire 3rd floor
- Entire 3,4,5 floor

IMPORTANT – Suppose you have the entire 3rd, 4th & 5th floor of this building. If you are paying different rents for each floor (\$30 PSF for the 3rd floor, \$32 PSF for the 4th floor, \$35 PSF for the 5th floor), you should create a separate subspace for each floor. In other words, you would have three subspaces in this lease (one for the 3rd floor, one for the

4th floor and one for the 5th floor). This will give you the ability to enter a different rent for each floor.

Conversely, if you have three floors and you are paying the same rent for all three floors (\$30 PSF for all three floors) you can create one subspace that includes all three floors.

CHANGING RENTABLE AREA DURING THE TERM

There are 3 scenarios under which you will need to change the rentable area during the term:

Scenario 1) Contract – Give back some space.

Scenario 2) Expand – Where the new expansion space is at the same per sq ft costs as the initial piece of space. All other expenses (Operating, CAM, Taxes, Utilities etc.) will also be the exact same as the initial piece of space on a per sq ft basis.

Scenario 3) Expand – Where the new expansion space is at a completely different base rent than the existing space. Or, on the expansion space, you might get new base years for taxes & operating, a few months of free rent on the expansion space etc.

There are two methods whereby you can change the rentable area during the term in ProLease. You cannot randomly choose a method to change the rentable area. The method that you will choose is dependent upon which of the 3 scenarios you have above.

METHOD #1) CHANGE RENTABLE AREA DURING TERM ON THE RENTABLE AREA / SUBSPACE SCREEN

If you have scenario #1 or #2 above, you will use this method.

In the case of scenario 1, contraction (I had 10,000 SF but I am giving back 3,000 SF and going down to 7,000 SF), we just need to multiply the per sq ft amount of all expenses times 7,000 SF instead of 10,000 SF. No cost per sq ft is going to change.

In the case of scenario 2, expansion where the per sq ft costs of the new space will be the exact same as the per sq ft costs of the old space. (I had 10,000 SF but I am expanding to 15,000 SF.) In this scenario, you need to multiply the old per SF costs by 15,000 SF.

On the Rentable Area / Subspace screen, there is a button labeled “Change Rentable Area During Term”.

Subspace Details View Help

▶ Subspace #*

Subspace Rentable SF* Subspace Usable SF

Subspace Commence* Primary Use*

Subspace Expire (CD)* Reason for Subspace

When you click on this button, you will be taken to the following screen:

Change Rentable Area

Term is from 11/1/2010 to 1/31/2021 - 123.00 months + Add New Entry

	From	To	# of Months	RSF	
1.	11/1/2010	1/31/2021	123.00 months	23,000.00	Delete

The above screen shows that we have 23,000 SF over the entire term (11/1/2010 – 1/31/2021). Suppose we were contracting and going down to 15,000 SF on 4/1/2016. You would:

- Change the “TO” date to 3/31/2016
- Click on the button labeled “Add New Entry”

- You would now have a second row on the screen that would show a “FROM” date of 4/1/2016 and a “TO” date of 1/31/2021.
- You would change the rentable area on the second row to 15,000 SF.

Your screen would now look like this:



From 11/1/2010 – 3/31/2016 all of your PSF costs will be multiplied by 23,000 SF to calculate your aggregate cost.

From 4/1/2016 – 1/31/2021 all of your PSF costs will be multiplied by 15,000 SF to calculate your aggregate cost.

-If you were to expand (Take additional space) and agree that the costs for the new space would be the exact same as the initial space (on a PSF Basis), you would use this same method but increase the rentable area on the second row.

METHOD #2) CREATE A NEW SUBSPACE FOR THE EXPANSION SPACE

Suppose you leased 10,000 SF for 10 years. In the middle of the term you need an additional 5,000 SF. The landlord has the perfect piece of space for you. You negotiate a deal on the expansion space where the base rent is a different rent PSF than the initial space, you get a few months of free rent, you get some TI money from the landlord for the new space, you get new base years for taxes & operating etc.

Because the rents for the expansion space are different than the initial space, you need to create a separate subspace for the expansion space. This will allow you to enter completely different expenses for the expansion space.

SS #	Reason for Subspace	Primary Use	Subspace RSF	Floors	Subspace Commence	Subspace Expire	RSF Changes	
1	Initial subspace	Office	23,000.00	Entire 23	11/1/2010	1/31/2021	<input type="checkbox"/>	View
2	Different primary use	Storage	2,000.00	Basement	11/1/2010	1/31/2021	<input type="checkbox"/>	View
3	Expansion space	Office	5,000.00	Part 25	8/1/2016	1/31/2021	<input type="checkbox"/>	View

Above is a screen shot of the Rentable Area / Subspaces screen showing:

- The initial piece of Office space – 23,000 SF
- The expansion Office space – 5,000 SF starting on 8/1/2016

By creating a separate Subspace for the expansion space, you can enter completely different expenses for the expansion space.

ENTERING / REPORTING ON EXPENSES

All expenses get entered on the expense screens. The expense screens are screen #'s 16-26 and they appear on the Go To menu in a green font (Green is the color of money. Catchy huh?).

Go to:	Data Level	
1	General Property Info	Property
2	Property Owner Company	Property
3	Leasing Agent Company	Property
4	Managing Agent Company	Property
5	Vendors	Property
6	Building Operation & HVAC Hours	Property
7	Property Level Custom Fields	Property
8	Projects & Assets Associated with Property	Property
9	Activities	Property
10	Straight Line Rent Calculation (New)	Property
11	Total Expenses In This Property	Property
12	Capitalization Schedules	Property
13	General Lease Info	Lease
14	Lease Term / Options	Lease
15	Rentable Area / Subspaces	Subspace
16	Base Rent	Subspace
17	Free Rent	Subspace
18	CPI & Percentage Increases	Subspace
19	Operating Expenses & CAM	Subspace
20	Real Estate Taxes	Subspace
21	Utility Costs	Subspace
22	Parking	Subspace
23	Additional Costs and Credits	Subspace
24	Management Fee	Subspace
25	Occupancy / Sales Tax	Subspace
26	Retail - % Rent	Subspace

When you look at the list of ProLease Standard Reports there are lots of expense reports that will allow you to report on your expenses in lots of different ways. Reports #21 – #66 are all different ways of looking at your expenses. In addition, most of these reports can be run at either the PROPERTY, LEASE or SUBSPACE scope so each report is actually 3 different reports.

Real Estate - Standard Reports ? View Help

Report Category	Report Title	
Miscellaneous	19. Annual Subspace Rentable Area Expirations by Company in Occupancy	Filter
Miscellaneous	20. Subspace Expirations	Filter
Expenses - Multi Year	21. Remaining Liability 5 Year	Filter
Expenses - Multi Year	22. Remaining Liability 5 Year Detail	Filter
Expenses - Multi Year	23. Remaining Liability 5 Year by Cost Center	Filter
Expenses - Multi Year	24. Remaining Liability 5 Year by Company In Occupancy	Filter
Expenses - Multi Year	25. Remaining Liability 10 Year	Filter
Expenses - Multi Year	26. Remaining Liability 10 Year Detail	Filter
Expenses - Multi Year	27. Remaining Liability Per RSF - 5 Year	Filter
Expenses - Multi Year	28. Remaining Liability Per RSF - 5 Year Detail	Filter
Expenses - Multi Year	29. Remaining Liability Minus Subtenant Income	Filter
Expenses - Monthly	30. Subtenant Invoices	Filter
Expenses - Monthly	31. Monthly Expenses for Any 12 Month Period	Filter
Expenses - Monthly	32. Monthly Expenses for Any 12 Month Period Detail	Filter
Expenses - Monthly	33. Monthly Expenses for Any 12 Month Period by Cost Center	Filter
Expenses - Monthly	34. Monthly Expenses for 1 Month Agg & PSF	Filter
Expenses - Monthly	35. Monthly Expenses for 1 Month Agg & PSF Detail	Filter
Expenses - Monthly	36. Monthly Expenses for 1 Month Agg & PSF By Cost Center	Filter
Expenses - Annual	37. Annual Expenses for Any 12 Month Period	Filter
Expenses - Annual	38. Annual Expenses for Any 12 Month Period Detail	Filter

Standard Reports
 Custom Reports

[View Report Notes](#)

Real Estate - Standard Reports ? View Help

Report Category	Report Title	
Expenses - Quarterly	39. Quarterly Expenses for Any 12 Month Period	Filter
Expenses - Quarterly	40. Quarterly Expenses for Any 12 Month Period Detail	Filter
Expenses - Monthly	41. Payment Schedule	Filter
Expenses - Monthly	42. Subtenant Income Schedule	Filter
Expenses	43. Amounts Associated With Pay To Companies	Filter
Expenses - Cumulative Total	44. Leased Line Item Totals	Filter
Expenses - Cumulative Total	45. Owned Line Item Totals	Filter
Expenses - Multi Year	46. Fixed Rent Expense Detail (Not Straight Line)	Filter
OLD Straight Line Rent Calc	47. OLD - Straight Line Rent - Annual Detail	Filter
OLD Straight Line Rent Calc	48. OLD - Straight Line Rent - Annual	Filter
OLD Straight Line Rent Calc	49. OLD - Straight Line Rent - Monthly Detail	Filter
OLD Straight Line Rent Calc	50. OLD - Straight Line Rent - Monthly	Filter
OLD Straight Line Rent Calc	51. OLD - 1 Month Straight Line Cumulative Differential	Filter
Expenses - Monthly	52. Free Rent Detail	Filter
Expenses - Annual	53. Cost Center Expenses by Subspace 1 Year	Filter
Expenses - Multi Year	54. Cost Center Expenses by Subspace 5 Year	Filter
Expenses	55. All Expenses	Filter
Expenses	56. Monthly Projections and Variable Base Amounts Comments	Filter
NEW Straight Line Rent Calc	57. 5 Year & Up Straight Line Rent Report Non-Detail	Filter
NEW Straight Line Rent Calc	58. 5 Year & Up Straight Line Rent Report Detail	Filter

Standard Reports
 Custom Reports

[View Report Notes](#)

Real Estate - Standard Reports ? View Help		
Report Category	Report Title	
NEW Straight Line Rent Calc	59. 10 Year & Up Straight Line Rent Report Non-Detail	Filter
NEW Straight Line Rent Calc	60. 10 Year & Up Straight Line Rent Report Detail	Filter
NEW Straight Line Rent Calc	61. 12 Month Straight Line Rent Report Non-Detail	Filter
NEW Straight Line Rent Calc	62. 12 Month Straight Line Rent Report Detail	Filter
NEW Straight Line Rent Calc	63. 1 Month Straight Line Rent Report Non-Detail	Filter
NEW Straight Line Rent Calc	64. 1 Month Straight Line Rent Report Detail	Filter
NEW Straight Line Rent Calc	65. S/L Schedules Where Data Has Been Changed After The Final Import Was Done	Filter
NEW Straight Line Rent Calc	66. S/L Schedule Segments Where the Final Import Needs to be Run	Filter

Standard Reports
 Custom Reports

IMPORTANT – All of the expense reports pull the expense information from data entry screens 16 – 26.

Expense Data Entry Screens

This section will show you how to enter:

- Base Rent
- Base Rent Increases (Fixed \$ amounts, Fixed % rates or CPI escalations)
- Free Rent

You can go to the other expense data entry screens and read the help file on those screens to learn how to enter other expenses (i.e. CAM, Operating, Real Estate Taxes, Utilities, Parking, One-time expenses etc.).

The expense data entry screens are screen #'s 16-26.

16	Base Rent	Subspace
17	Free Rent	Subspace
18	CPI & Percentage Increases	Subspace
19	Operating Expenses & CAM	Subspace
20	Real Estate Taxes	Subspace
21	Utility Costs	Subspace
22	Parking	Subspace
23	Additional Costs and Credits	Subspace
24	Management Fee	Subspace
25	Occupancy / Sales Tax	Subspace
26	Retail - % Rent	Subspace

As you can see, all expenses are at the “Subspace” level. This means that every time you create a new subspace, you are creating a set of expense screens that will allow you to enter the expenses for that subspace.

For example, suppose you sign a lease for a total of 12,000 SF of space. However, there is 10,000 SF of Office space and 2,000 SF of Storage space. You are paying \$30 PSF for the Office space and \$8 PSF for the Storage space. In addition, you are paying Operating & Real Estate Taxes on the Office space but not on the Storage space. You would create 2 different subspaces. One for the Office space and one for the Storage space. Each subspace has its own set of expense screens (#16-26) so you would be able to enter completely different expenses for the Office and Storage space. FYI – Both the office space and the storage space run for the same term (5/1/2016 – 7/30/2021 -- 63 months).

In the screen shot below, you can see that I have set up two different subspaces. One for the Office space (Subspace #1) and another for the Storage space (Subspace #2).

ProLease

File Edit View Print Calculators Help

[View Key Info](#) ▶ 394791 • 100 Johnsonville Turnpike • Albany, NY • United States

15. Rentable Area / Subspaces View Help

+ Add New Subspace

LEASE Term: 5/1/2016 - 7/31/2021 (5 Years 3 Months 0 Days)

SS #	Reason for Subspace	Primary Use	Subspace RSF	Floors	Subspace Commence	Subspace Expires	RSF Changes	
1	Initial subspace	Office	10,000.00	Suite 1500	5/1/2016	7/31/2021	<input type="checkbox"/>	View
2	Different primary use	Storage	2,000.00	Basement	5/1/2016	7/31/2021	<input type="checkbox"/>	View

Entering Base Rent (Screen #16) / Free Rent (Screen #17)

When you go to the Base Rent screen, it will look like this:

16. Base Rent Clear This Screen View Help

▶ Select a Subspace - 2 Subspaces + Page #

Subspace	Subspace Reason	Primary Use	Rentable Area	Floors	SS Commence	SS Expire
1	Initial subspace	Office	10,000.00 SF	Suite 1500	5/1/2016	7/31/2021

▶ Data Entry

Enter Either + Add Another Base Rent Line

From	To	# of Months	PSF Per Year	Annual Amount	Monthly Amount

Total Months: .00

▶ Monthly Projections ▶ Base Rent Comments ▶ Old Straight Line Rent Dates & Amount

▶ Payment Info ▶ Company Details

Pay To Company

Sep 2017 Cost

Next Change Date

Pay Frequency *

Go to 16. Base Rent Back Next New Search Search Results Reports Main Menu

Select a Subspace – All expenses are entered at the subspace level. At the top of the screen is the Subspace Bar. This lets you know what subspace you are looking at the Base Rent for. If you click on the Subspace bar, it will show you a list of all the subspaces in this lease. See screen shot below.

16. Base Rent Clear This Screen View

▶ Select a Subspace - 2 Subspaces + Page #

Subspace	Subspace Reason	Primary Use	Rentable Area	Floors	SS Commence	SS Expire
1	Initial subspace	Office	10,000.00 SF	Suite 1500	5/1/2016	7/31/2021
2	Different primary use	Storage	2,000.00 SF	Basement	5/1/2016	7/31/2021

You can see the 10,000 SF of Office space and the 2,000 SF of Storage space shown on the drop-down list. We will leave it on subspace #1 (Office space) for now.

You are now ready to enter the Base Rent for the Office space.

Enter Either –

When you are entering base rent, you will have to say “for this period of time, the rent will be X”. You can enter a period of time in two ways:

-Full Dates – This means you will enter a “From” and “To” date. For example, from 3/1/2017 – 2/28/2018 the rent will be \$30 per sq ft.

-Number of Months – This means you will enter a number of months and ProLease will automatically calculate the “From” & “To” dates. For example, 12 months at \$30 per sq ft, the next 12 months at \$30.50 per sq ft etc. When you enter the number of months, ProLease will automatically calculate the “From” & “To” dates.

IMPORTANT – If your lease commences mid month (Any day other than the first day of the month), you will not be able to use “Number of months”. You must select “Full dates” to enter the rent.

Entering the Base Rent Amount

16. Base Rent

▶ Select a Subspace - 2 Subspaces

Subspace	Subspace Reason	Primary Use	Rentable Area	Floors
1 ▼	Initial subspace	Office	10,000.00 SF	Suite 1500

▶ Data Entry

Enter Either Full Dates + Add Another Base Rent Line

From	To	# of Months	PSF Per Year	Annual Amount	Monthly Amount

Total Months: .00

To add Base Rent, click on the button labeled “Add Another Base Rent Line” and the screen will now look like this:

▶ Data Entry

Enter Either Full Dates + Add Another Base Rent Line

#	From	To	# of Months	PSF Per Year	Annual Amount	Monthly Amount	
1.	5/1/2016	7/31/2021	63.00				Delete

Total Months: 63.00 *You have entered the perfect # of months!*

Suppose our rent was:

5/1/2016 – 7/31/2016	3 Months	Free rent
8/1/2016 – 7/31/2017	12 Months	\$30.00 PSF
8/1/2017 – 7/31/2018	12 Months	\$30.50 PSF
8/1/2018 – 7/31/2019	12 Months	\$31.00 PSF
8/1/2019 – 7/31/2020	12 Months	\$31.50 PSF
8/1/2020 – 7/31/2021	12 Months	\$32.00 PSF

You would enter it like this:

16. Base Rent

▶ Select a Subspace - 2 Subspaces

Subspace	Subspace Reason	Primary Use	Rentable Area	Floors
1 ▼	Initial subspace	Office	10,000.00 SF	Suite 1500

▶ Data Entry

Enter Either + Add Another Base Rent Line

	From	To	# of Months	PSF Per Year	Annual Amount	Monthly Amount	
1.	5/1/2016	7/31/2016	3.00	\$0.00	\$0.00	\$0.00	Delete
2.	8/1/2016	7/31/2017	12.00	\$30.00	\$300,000.00	\$25,000.00	Delete
3.	8/1/2017	7/31/2018	12.00	\$30.50	\$305,000.00	\$25,416.67	Delete
4.	8/1/2018	7/31/2019	12.00	\$31.00	\$310,000.00	\$25,833.33	Delete
5.	8/1/2019	7/31/2020	12.00	\$31.50	\$315,000.00	\$26,250.00	Delete
6.	8/1/2020	7/31/2021	12.00	\$32.00	\$320,000.00	\$26,666.67	Delete

Total Months: *You have entered the perfect # of months!*

Alternate Method for Entering Free Rent

In the example above I put 3 months of free rent on the base rent screen. There is an alternate way of doing this. You can enter base rent as if there was no free rent and then enter the Free Rent on screen #17.

That would look like this:

16. Base Rent

▶ Select a Subspace - 2 Subspaces

Subspace	Subspace Reason	Primary Use	Rentable Area	Floors
1 ▼	Initial subspace	Office	10,000.00 SF	Suite 1500

▶ Data Entry

Enter Either + Add Another Base Rent Line

	From	To	# of Months	PSF Per Year	Annual Amount	Monthly Amount	
1.	5/1/2016	7/31/2017	15.00	\$30.00	\$300,000.00	\$25,000.00	Delete
2.	8/1/2017	7/31/2018	12.00	\$30.50	\$305,000.00	\$25,416.67	Delete
3.	8/1/2018	7/31/2019	12.00	\$31.00	\$310,000.00	\$25,833.33	Delete
4.	8/1/2019	7/31/2020	12.00	\$31.50	\$315,000.00	\$26,250.00	Delete
5.	8/1/2020	7/31/2021	12.00	\$32.00	\$320,000.00	\$26,666.67	Delete

Total Months: *You have entered the perfect # of months!*

Now you will go to screen #17 Free Rent, and enter the 3 months of free rent on that screen.

17. Free Rent

Clear This Screen View Help

▶ Select a Subspace - 2 Subspaces + Page #

Subspace	Subspace Reason	Primary Use	Rentable Area	Floors	SS Commence	SS Expire
1 ▼	Initial subspace	Office	10,000.00 SF	Suite 1500	5/1/2016	7/31/2021

Term is 5/1/2016 - 7/31/2021 - 63 Mos

Year No.	Year Beginning	# Months Free
1	5/1/2016	3.00000
2	5/1/2017	
3	5/1/2018	
4	5/1/2019	
5	5/1/2020	
6	5/1/2021	

Total Months:

Free Rent Comments

Monthly Projections Free Rent Conversion Calculator

Go to 17. Free Rent Back Next New Search Search Results Reports Main Menu

Notice on the base rent screen above, the initial \$30 per sq ft rental rate goes for 15 months. That is the 3 months of free rent and then 12 months at \$30 PSF. You are entering the Base Rent as if there is no Free Rent so we assume the rent during the Free

Rent period is the starting rent (\$30 PSF in our example). Then you go to the Free Rent screen and enter 3 months of free rent in year 1.

When you put 3 months of free rent in year 1, it assumes it is the first 3 months of year but what if you had:

- Month #1, #6 and #12 were free
- OR
- You got 6 months of half rent free instead of 3 full months of free rent

ProLease allows you to make any portion of any month free. On either screen (16 – Base Rent or 17 – Free Rent) click on the button labeled Monthly Projections in the lower left corner. You will now be looking at the following screen:

Base Rent Monthly Projections											
				<input type="radio"/> Show Per SF \$ <input checked="" type="radio"/> Show Agg \$							
Filter Dates:		From		To						Run Filter	
		None		Restore		None		Restore			
Year	Month #	Date	RSF	Base Rent Pre Free Rent	Manual Change	% Month Free	Manual Change	Base Rent Post Free Rent	Amount Est / Act	Paid	
1	1	5/1/2016	10,000.00	\$25,000.00		100.00%		\$0.00	C	Estimated	
1	2	6/1/2016	10,000.00	\$25,000.00		100.00%		\$0.00	C	Estimated	
1	3	7/1/2016	10,000.00	\$25,000.00		100.00%		\$0.00	C	Estimated	
1	4	8/1/2016	10,000.00	\$25,000.00		0.00%		\$25,000.00	C	Estimated	
1	5	9/1/2016	10,000.00	\$25,000.00		0.00%		\$25,000.00	C	Estimated	
1	6	10/1/2016	10,000.00	\$25,000.00		0.00%		\$25,000.00	C	Estimated	
1	7	11/1/2016	10,000.00	\$25,000.00		0.00%		\$25,000.00	C	Estimated	
1	8	12/1/2016	10,000.00	\$25,000.00		0.00%		\$25,000.00	C	Estimated	
1	9	1/1/2017	10,000.00	\$25,000.00		0.00%		\$25,000.00	C	Estimated	
1	10	2/1/2017	10,000.00	\$25,000.00		0.00%		\$25,000.00	C	Estimated	
1	11	3/1/2017	10,000.00	\$25,000.00		0.00%		\$25,000.00	C	Estimated	
1	12	4/1/2017	10,000.00	\$25,000.00		0.00%		\$25,000.00	C	Estimated	
Totals				\$1,625,000.00		3.00		\$1,550,000.00			
				Free Rent Value:				\$75,000.00			

There are 3 columns on the screen above labeled:

- Base Rent Pre Free Rent
- % Month Free
- Base Rent Post Free Rent

This screen allows you to make any percentage of any month free. In the column labeled “% Month Free”, you could change it to 50.00% in the first 6 months like this:

Base Rent Monthly Projections											
		<input type="radio"/> Show Per SF \$ <input checked="" type="radio"/> Show Agg \$		Filter Dates: From <input type="text"/> To <input type="text"/>						⚡ Run Filter	
		None		Restore		None		Restore			
Year	Month #	Date	RSF	Base Rent Pre Free Rent	Manual Change	% Month Free	Manual Change	Base Rent Post Free Rent		Amount Est / Act	Paid
1	1	5/1/2016	10,000.00	\$25,000.00	<input type="checkbox"/>	50.00%	<input checked="" type="checkbox"/>	\$12,500.00	C	Estimated	<input type="checkbox"/>
1	2	6/1/2016	10,000.00	\$25,000.00	<input type="checkbox"/>	50.00%	<input checked="" type="checkbox"/>	\$12,500.00	C	Estimated	<input type="checkbox"/>
1	3	7/1/2016	10,000.00	\$25,000.00	<input type="checkbox"/>	50.00%	<input checked="" type="checkbox"/>	\$12,500.00	C	Estimated	<input type="checkbox"/>
1	4	8/1/2016	10,000.00	\$25,000.00	<input type="checkbox"/>	50.00%	<input checked="" type="checkbox"/>	\$12,500.00	C	Estimated	<input type="checkbox"/>
1	5	9/1/2016	10,000.00	\$25,000.00	<input type="checkbox"/>	50.00%	<input checked="" type="checkbox"/>	\$12,500.00	C	Estimated	<input type="checkbox"/>
1	6	10/1/2016	10,000.00	\$25,000.00	<input type="checkbox"/>	50.00%	<input checked="" type="checkbox"/>	\$12,500.00	C	Estimated	<input type="checkbox"/>
1	7	11/1/2016	10,000.00	\$25,000.00	<input type="checkbox"/>	0.00%	<input type="checkbox"/>	\$25,000.00	C	Estimated	<input type="checkbox"/>
1	8	12/1/2016	10,000.00	\$25,000.00	<input type="checkbox"/>	0.00%	<input type="checkbox"/>	\$25,000.00	C	Estimated	<input type="checkbox"/>
1	9	1/1/2017	10,000.00	\$25,000.00	<input type="checkbox"/>	0.00%	<input type="checkbox"/>	\$25,000.00	C	Estimated	<input type="checkbox"/>
1	10	2/1/2017	10,000.00	\$25,000.00	<input type="checkbox"/>	0.00%	<input type="checkbox"/>	\$25,000.00	C	Estimated	<input type="checkbox"/>
1	11	3/1/2017	10,000.00	\$25,000.00	<input type="checkbox"/>	0.00%	<input type="checkbox"/>	\$25,000.00	C	Estimated	<input type="checkbox"/>
1	12	4/1/2017	10,000.00	\$25,000.00	<input type="checkbox"/>	0.00%	<input type="checkbox"/>	\$25,000.00	C	Estimated	<input type="checkbox"/>
Totals				\$1,625,000.00		3.00		\$1,550,000.00			
				Free Rent Value:		\$75,000.00					

IMPORTANT - You can change the Base Rent in any month or you can make any percentage of any month free using the Monthly Projections. Every expense screen (Screen #'s 16 – 26) has the Monthly Projections and will allow you to manually change any cost in any month to accommodate all those wonderful special occasions we have to deal with in Real Estate every month.

IMPORTANT – On the screen above, notice there is a column labeled “Manual Change”. In any month where you make a manual change, that box will appear checked. Notice the first 6 months are all checked because we changed the Free Rent in each of those months to be 50%.

Notice there is a “RESTORE” button at the top of that column. If you click on the “RESTORE” button, it will undo all of the changes in that column in any month that is labeled “ESTIMATED” in the last column. If that last column is “ACTUAL”, that amount has been exported via the ProLease A/P export function so it will not be restored to its original value.

INCREASING THE BASE RENT WITH A % INCREASE

In the Base Rent example above, we increased the base rent amount by a fixed dollar amount each year (\$.50 increases each year). Sometimes you might negotiate a % increase from year to year. For example, your rent starts at \$30 PSF but every year on the anniversary of the lease, your rent goes up by 3% per annum. Or maybe you have a CPI increase which will be a different % increase each year based on a CPI index.

Lets use the same example of a 63 month lease from 5/1/2016 – 7/31/2021. 3 months of free rent and the rent starts out at \$30 PSF but goes up at a fixed 3.00% increase every year starting on 8/1/2017. There are two ways you could enter this base rent stream

Method #1) Enter it all on the base rent screen and calculate the 3.00% increases. That would look like this:

16. Base Rent

▶ Select a Subspace - 2 Subspaces

Subspace	Subspace Reason	Primary Use	Rentable Area	Floors
1 ▼	Initial subspace	Office	10,000.00 SF	Suite 1500

▶ Data Entry

Enter Either Number of Months ▼ + Add Another Base Rent Line

	From	To	# of Months	PSF Per Year	Annual Amount	Monthly Amount	
1.	5/1/2016	7/31/2016	3.00	\$0.00	\$0.00	\$0.00	Delete
2.	8/1/2016	7/31/2017	12.00	\$30.00	\$300,000.00	\$25,000.00	Delete
3.	8/1/2017	7/31/2018	12.00	\$30.90	\$309,000.00	\$25,750.00	Delete
4.	8/1/2018	7/31/2019	12.00	\$31.83	\$318,270.00	\$26,522.50	Delete
5.	8/1/2019	7/31/2020	12.00	\$32.78	\$327,818.10	\$27,318.18	Delete
6.	8/1/2020	7/31/2021	12.00	\$33.77	\$337,652.64	\$28,137.72	Delete

Total Months: 63.00 *You have entered the perfect # of months!*

Method #2 – You would enter a Base Rent of \$30 PSF for the entire term on the Base Rent screen (8/1/2016 – 7/31/2021), then use screen #18 - CPI / % Per Annum Increase Screen to enter the variables for the 3.00% per annum increase and ProLease will calculate the increases automatically. That would look like this:

16. Base Rent

▶ Select a Subspace - 2 Subspaces

Subspace	Subspace Reason	Primary Use	Rentable Area	Floors
1	Initial subspace	Office	10,000.00 SF	Suite 1500

▶ Data Entry

Enter Either

	From	To	# of Months	PSF Per Year	Annual Amount	Monthly Amount	
1.	5/1/2016	7/31/2016	3.00	\$0.00	\$0.00	\$0.00	Delete
2.	8/1/2016	7/31/2021	60.00	\$30.00	\$300,000.00	\$25,000.00	Delete

Total Months: *You have entered the perfect # of months!*

18. CPI & Percentage Increases

Clear This Screen View Help

▶ Select a Subspace - 2 Subspaces

Subspace	Subspace Reason	Primary Use	Rentable Area	Floors	SS Commence	SS Expire
1	Initial subspace	Office	10,000.00 SF	Suite 1500	5/1/2016	7/31/2021

▶ Data Entry

Data Entry Mode*

Escalation Name* Month Increase Occurs*

Base Year* Adjust Payment Every* Months

Increase Rate*

▶ Payment Info

Pay To Company

> Variable Base Amounts > Monthly Projections

When you are entering the 3.00% increase information on screen #18 above, you need to tell ProLease 4 things:

- 1) What is the name of the escalation (Escalation Name)
- 2) When does the increase start (Base Year, Month Increase Occurs)
- 3) How much is the increase each year (Increase Rate)
- 4) How often does the increase occur (Adjust Payment Every)

Our lease commences on 5/1/2016. We have 3 months of free rent (5/1/2016 – 7/31/2016). Our rent commencement date is 8/1/2016. We pay \$30 PSF for the next 12 months (8/1/2016 – 7/31/2017). On 8/1/2017 (and every August after that) our rent goes up by a fixed 3.00% per annum.

-Our increase begins on 8/1/2017. The data entry required to get that to happen is:

Base Year	=	2016
Month # Increase Occurs	=	8

The first increase will always occur in the year after the base year. If you have a 2016 base year, the first increase will occur in 2017. The month # the increase occurs tells ProLease when in 2017. We have 8 in that field for August. So our first increase will occur in 8/2017.

-Our increase occurs every 12 months from 8/1/2017. The data entry required to get that to happen is in the field labeled “Adjust Payment Every X Months” is to enter 12 in that field. ProLease now knows every 12 months after 8/1/2017 to increase the previous 12 months of rent.

-We want to increase the rent by 3.00% every year. The data entry required to get that to happen is to fill in 3.00% in the increase rate field.

That’s it. Your done. Regardless of which way you choose to enter a 3.00% per annum increase, the total amount of rent for that subspace will be the same. However, it will appear differently on the detail reports.

Below is an example of the 5 Year Remaining Liability Detail Report showing what it looks like when you enter the 3.00% per annum increase on the CPI / % Per Annum Increase screen. Notice the Base Rent shows \$300,000 every year, then on a separate line, you see the 3.00% Per Annum increases every year starting in August 2017.

22. Remaining Liability 5 Year Detail - 5/1/2016 And Up							ABC Co	
Subspace Term	Subspace Rentable Area	1. May 16 to Jul 16	2. Aug 16 to Jul 17	3. Aug 17 to Jul 18	4. Aug 18 to Jul 19	5. Aug 19 to Jul 20	6. Aug 20 and Up	Total RL
5/1/2016 to 7/31/2021 5 years 3.00 months	10,000.00 SF							
<i>Base Rent Post Free Rent</i>		0	\$300,000	\$300,000	\$300,000	\$300,000	\$300,000	\$1,500,000
<i>Fixed % Per Annum</i>		0	0	\$9,000	\$18,270	\$27,818	\$37,653	\$92,741
		0	\$300,000	\$309,000	\$318,270	\$327,818	\$337,653	\$1,592,741

Below is an example of the same report when you enter the 3.00% Per Annum increases on the Base Rent screen. Notice there is only one line for Base Rent and it includes the 3.00% Per Annum increases.

22. Remaining Liability 5 Year Detail - 5/1/2016 And Up							ABC Co	
Subspace Term	Subspace Rentable Area	1. May 16 to Jul 16	2. Aug 16 to Jul 17	3. Aug 17 to Jul 18	4. Aug 18 to Jul 19	5. Aug 19 to Jul 20	6. Aug 20 and Up	Total RL
5/1/2016 to 7/31/2021 5 years 3.00 months	10,000.00 SF							
<i>Base Rent Post Free Rent</i>		0	\$300,000	\$309,000	\$318,270	\$327,818	\$337,653	\$1,592,741
		0	\$300,000	\$309,000	\$318,270	\$327,818	\$337,653	\$1,592,741

IMPORTANT – Either way you enter the 3.00% Per Annum increase, you end up with the same amount of rent. It’s just a function of how you want to see it on the reports.

HOW TO ENTER A LEASE RENEWAL

One of the most common tasks ProLease users have to do is renew a current lease obligation. This is a three-step process that I will outline for you, step by step, in this section.

For purposes of this example, assume the following:

- Today is 3/2017
- The initial lease term was 7/1/2007 – 6/30/2017 (10 yrs)
- I have renewed for an additional 5-year term 7/1/2017 – 6/30/2022
- I have not signed a new lease document. We have amended the existing lease.
- I had previously leased 10,000 SF and I am going to renew for the same 10,000 SF.

Step #1) Go to the lease term screen and this is what you will see:

14. Lease Term / Options

▶ Lease Term Dates

Lease Commence Date *	7/1/2007		
Lease Expiration Date (CD) *	6/30/2017	Delete	Restore
Expiration Reminder Date (CD) *	1/1/2017	Delete	Restore

FYI - Your Lease term is 10 Years 0 Months 0 Days (120.00000000 Months)

You need to change the lease expiration date to the new lease expiration date which is 6/30/2022. When you do this, the lease expiration reminder date will automatically recalculate based on the number of days you have set in the preferences for the Lease Expiration Reminder Date. You can also change the expiration reminder date manually if you want to.

Lease Term Screen Showing New Expiration Date

14. Lease Term / Options

▶ **Lease Term Dates**

Lease Commence Date *

Lease Expiration Date (CD)*

Expiration Reminder Date (CD)*

FYI - Your Lease term is 15 Years 0 Months 0 Days (180.00000000 Months)

Step #2) In the navigation bar at the bottom of the screen, click “Next” and you will be taken to the next screen which is the Rentable Area / Subspace screen shown below.

15. Rentable Area / Subspaces ? View Help

LEASE Term: 7/1/2007 - 6/30/2022 (15 Years 0 Months 0 Days) + Add New Subspace

SS #	Reason for Subspace	Primary Use	Subspace RSF	Floors	Subspace Commence	Subspace Expire	RSF Changes	
1	Initial subspace	Office	10,000.00		7/1/2007	6/30/2017	<input type="checkbox"/>	<input type="button" value="View"/>

IMPORTANT – If I had signed a new lease document for the renewal, I would create a new lease in the property. In our example, I did NOT sign a new lease, I signed an amendment to the existing lease extending the term for another 5 years so I need to add a new subspace to the existing lease.

You will notice that changing the lease expiration date on the lease term screen in step #1 above had no effect on the subspace expiration date. The initial subspace for the initial 10-year term still exists and expires on the old expiration date of 6/30/2017. That is what you want. You now need to create a new subspace for the new 5-year renewal term that goes from 7/1/20167 – 6/30/2022.

To add a new subspace, click on “Add New Subspace” button in the upper right-hand corner and you will be at the following screen:

-The subspace commence & expire dates automatically default to the lease commence & expire dates. You need to change the subspace commence date to the start date of the renewal term which is 7/1/2017. The subspace expiration date is correct so no need to touch that.

-You need to enter the subspace rentable area. We originally leased 10,000 SF. We are going to renew the same 10,000 SF so you can enter 10,000 in the “Subspace Rentable Area” field.

IMPORTANT – If you renewed for a different rentable area (either expanded or contracted), enter that rentable area for the renewal term. In our example, we are renewing for the same rentable area of 10,000 SF.

-The Primary Use will remain as “Office”.

-The “Reason for Subspace” should be “Renewal”. This will let everybody understand what was the reason this Subspace was created.

When you are done, the screen should look like this:

Subspace Details

▶ **Subspace #***

Subspace Rentable SF* Subspace Usable SF

Subspace Commence* Primary Use* ▼

Subspace Expire (CD)* Reason for Subspace ▼

SUBSPACE Term = 7/1/2017 - 6/30/2022
5 Years 0 Months 0 Days (60.00000000 Months) LEASE Term = 7/1/2007 - 6/30/2022
15 Years 0 Months 0 Days (180.00000000 Months)

Click OK at the bottom of the screen and you will now be back on the Rentable Area / Subspace screen shown below.

15. Rentable Area / Subspaces ? View Help

LEASE Term: 7/1/2007 - 6/30/2022 (15 Years 0 Months 0 Days)

SS #	Reason for Subspace	Primary Use	Subspace RSF	Floors	Subspace Commence	Subspace Expire	RSF Changes	
1	Initial subspace	Office	10,000.00		7/1/2007	6/30/2017	<input type="checkbox"/>	View
2	Renewal	Office	10,000.00		7/1/2017	6/30/2022	<input type="checkbox"/>	View

Notice there are two subspaces. Subspace one is for the initial 10-year term. Subspace #2 is for the 5-year renewal term. Notice how subspace #2 starts the day after subspace #1 ends.

Step #3) Click Next and you are on the base rent screen shown below.

16. Base Rent Clear This Screen View Help

▶ Select a Subspace - 2 Subspaces + Page #

Subspace	Subspace Reason	Primary Use	Rentable Area	Floors	SS Commence	SS Expire
2	Renewal	Office	10,000.00 SF		7/1/2017	6/30/2022

▶ Data Entry + Add Another Base Rent Line

Enter Either Full Dates +

From	To	# of Months	PSF Per Year	Annual Amount	Monthly Amount

Total Months:

▶ Monthly Projections ▶ Base Rent Comments ▶ Old Straight Line Rent Dates & Amount

▶ Payment Info ▶ Company Details

Pay To Company Prop Owner/Sublessor

Sep 2017 Cost

Next Change Date

Pay Frequency* Monthly

Go to 16. Base Rent Back Next New Search Search Results Reports Main Menu

At the top of the screen is the “Subspace” bar. You are looking at the base rent for subspace #2. There is no rent because you just created subspace #2. You can now enter the rent for the renewal term. If you want to see the rent from the initial term, change the subspace bar to show subspace #1.

You can also go to 17 - 26 (Expense screens) and enter all the expenses for the renewal term. Every expense screen has the subspace bar at the top so you will always be able to go back and see the expenses for subspace #1 or subspace #2.

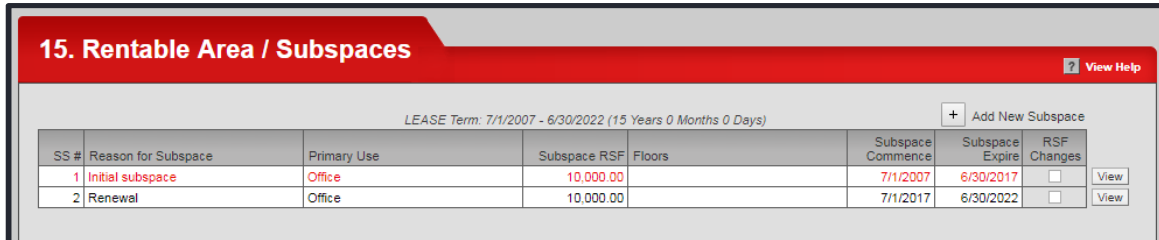
That’s’ it. You are done. You have now entered this renewal term into ProLease. Oh...wait...one other thing. If you had a renewal option entered in the lease term / options screen, you will want to go and change the option status to “Option was exercised”. In addition, you will want to go to the critical date / alarm screen and delete all three renewal option critical dates (Reminder Date, Landlord Notify Date, Active Date) from the critical date alarm screen so nobody gets e-mails about this option in the future.

If there is no renewal option entered on the lease term screen, you do not have to worry about deleting critical dates.

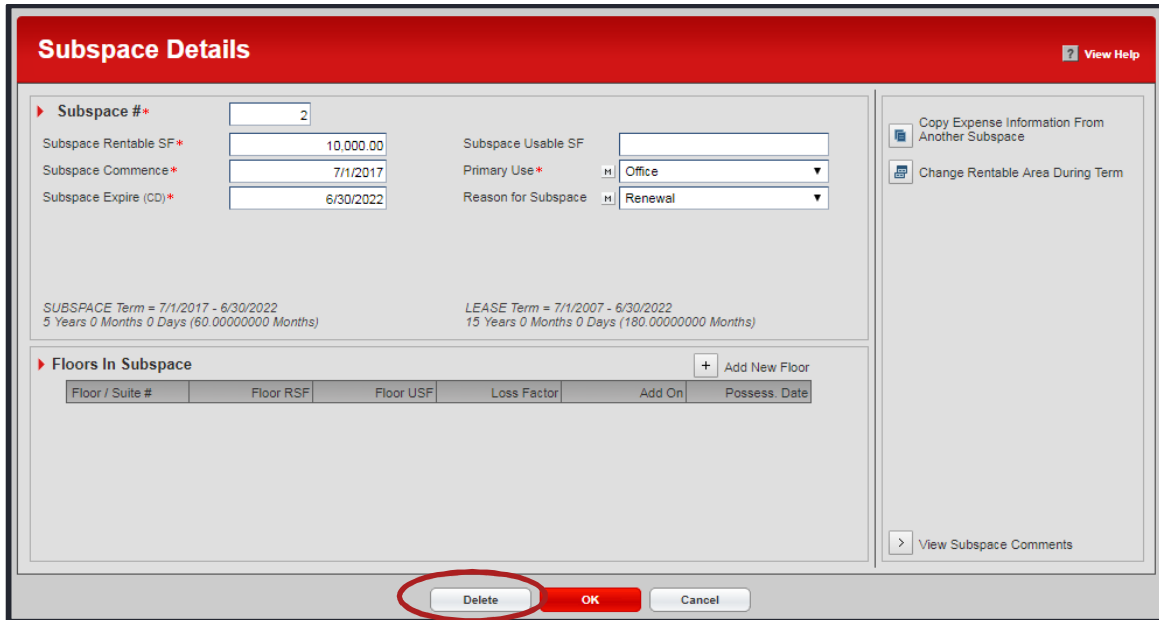
DELETING PROPERTIES, LEASES & SUBSPACES

Delete a Subspace

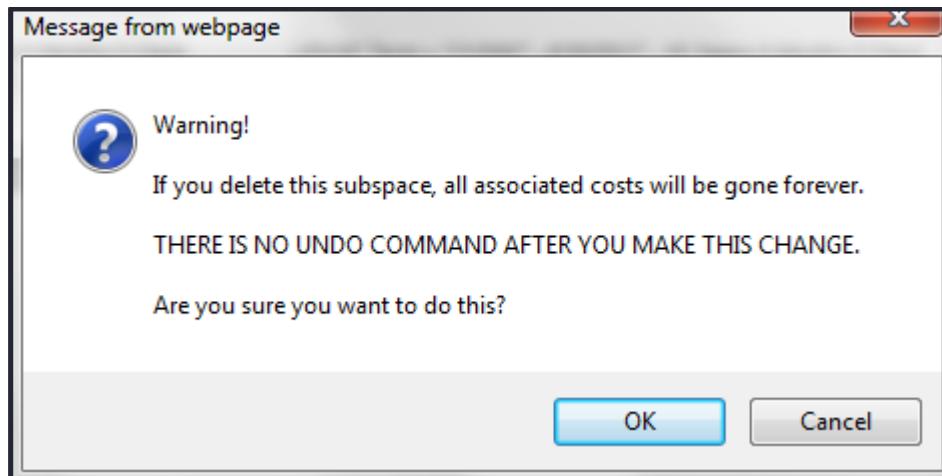
To delete a subspace, go to the Rentable Area / Subspace screen and click on the “View” button for the subspace you want to delete.



You will now be at the following screen:



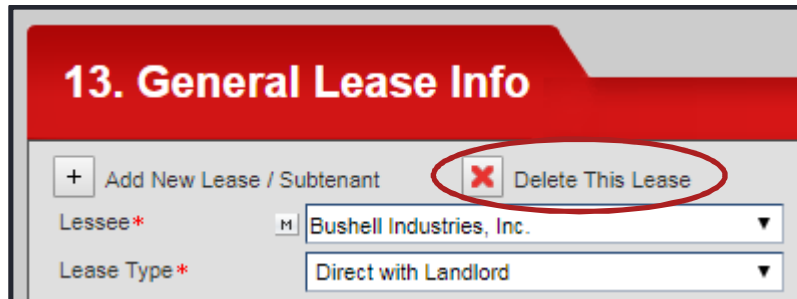
Click on the “Delete” button at the bottom of the screen. You will get a warning message as follows:



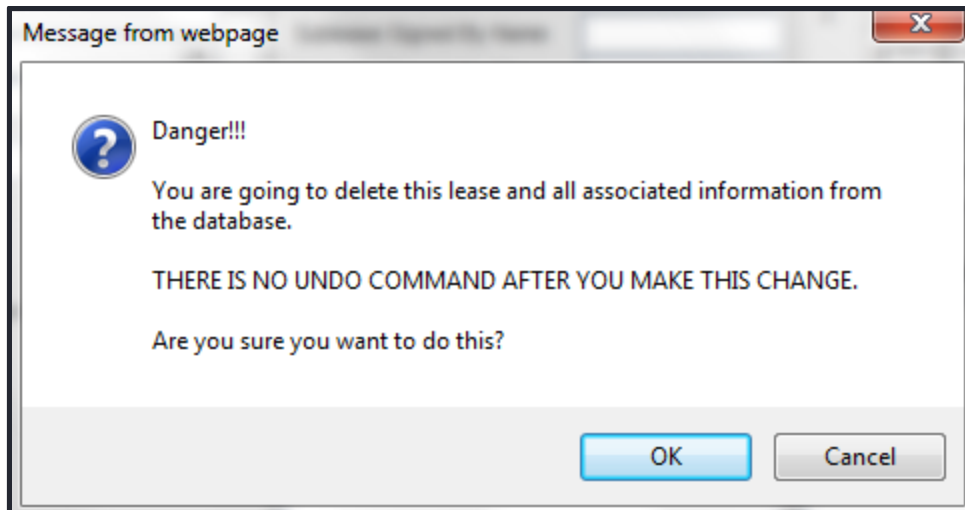
IMPORTANT – You will NOT be able to delete the only subspace in a lease. Every lease must have at least one subspace in it.

Delete a Lease

To delete a lease, go to the General Lease Info screen.



There is a button labeled "Delete this Lease". When you click it, you will get a warning message:

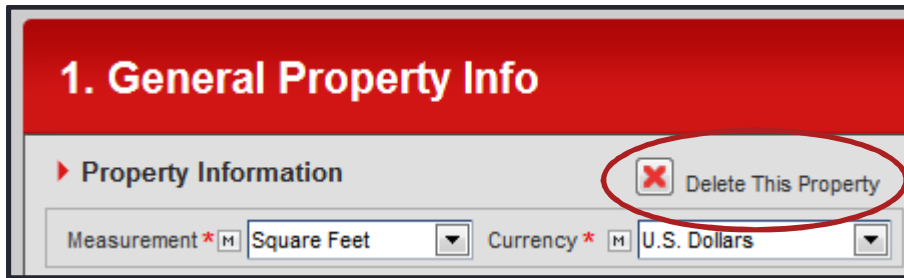


IMPORTANT – When you delete a lease, you will also delete all the subspaces in that lease.

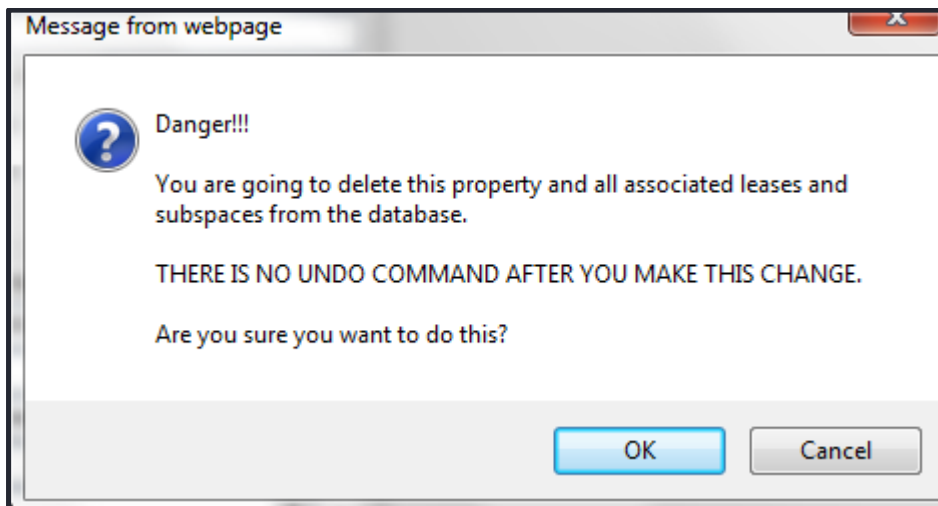
IMPORTANT – You will NOT be able to delete the only lease in a leased property. You must have at least one lease in a leased property.

Delete a Property

To delete a property, go to the General Property Info screen.



There is a button labeled "Delete This Property". When you click it, you will get the following warning message:



IMPORTANT – When you delete a property, you delete all leases and all subspaces in that property.

PROLEASE REPORTS

ProLease has three different types of reports. They are:

- 1) Standard Reports
- 2) User Created Custom Reports
- 3) Customized Reports created by us

1) Standard Reports - ProLease has over 130 standard reports. Standard reports are preformatted reports that have been created by us. You can filter them to include any locations you want but you cannot change the information contained in them.

2) Custom Reports – ProLease has a custom report feature that will allow the user to create their own custom reports. You can take any data entry field in ProLease and put it on a piece of paper with any other data entry field.

IMPORTANT – You cannot include any expenses in a custom report that you create with the custom report feature. That is why we have so many standard expense reports. If you need a custom report that requires expenses, we will have to customize it for you.

3) We customize a report for you – Because data is so complex, it would be impossible for us to give you an interface where we could allow you to easily create any report you could possibly want to see. ProLease has over 300 tables in the backend with a complicated structure that has many types of relationships (one to one, one to many and many to many). To be able to create any report you could possibly want to see would require you to have an incredible knowledge of the table structure of ProLease and significant programming skills. Since the knowledge of the table structure is top, top secret, and most of our users do not have the necessary programming skills, that leaves us to do a custom programming job for you. We are available to create / customize any report you could possibly want to see. There is an additional charge for this (\$175 per hour). Once we know exactly what it is you need, we will be able to give you an exact price quote to get your report created.

ProLease Standard Reports

There are three ways you can get to the ProLease Standard Reports:

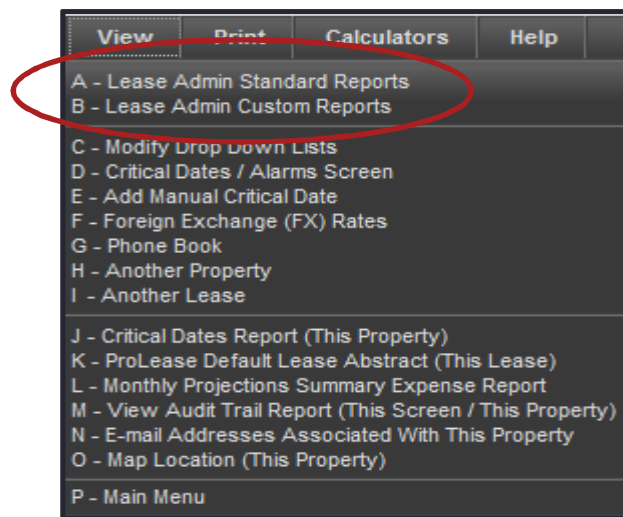
- 1) From the ProLease Main Menu, click on “Reports”



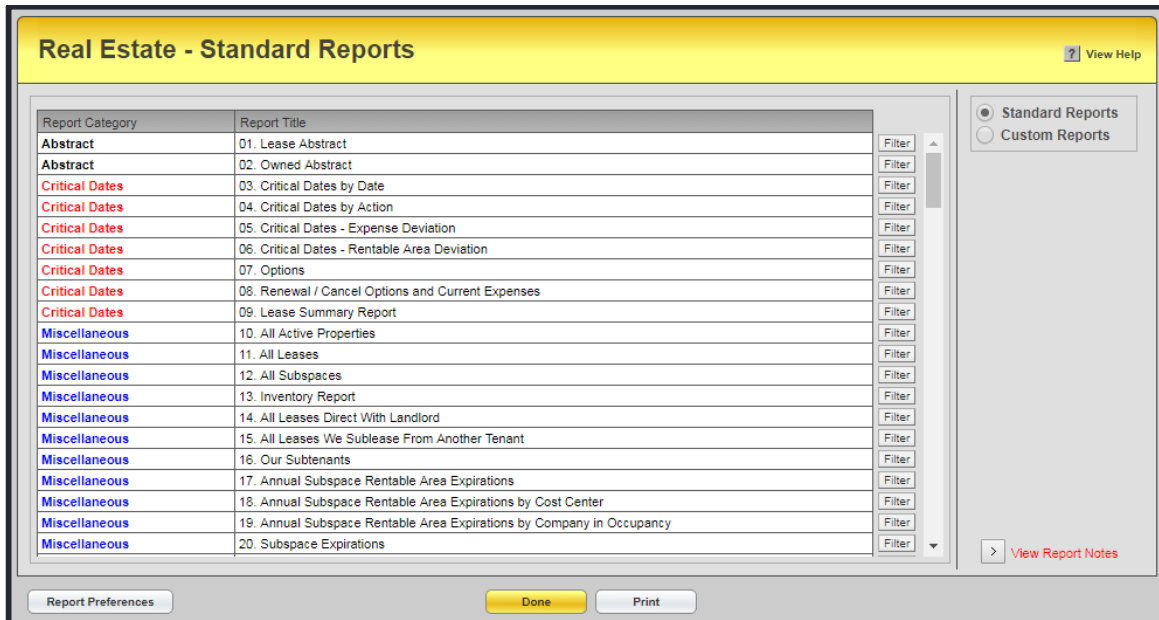
- 2) From any data entry screen using the navigation bar at the bottom, click on the button labeled “Reports”.



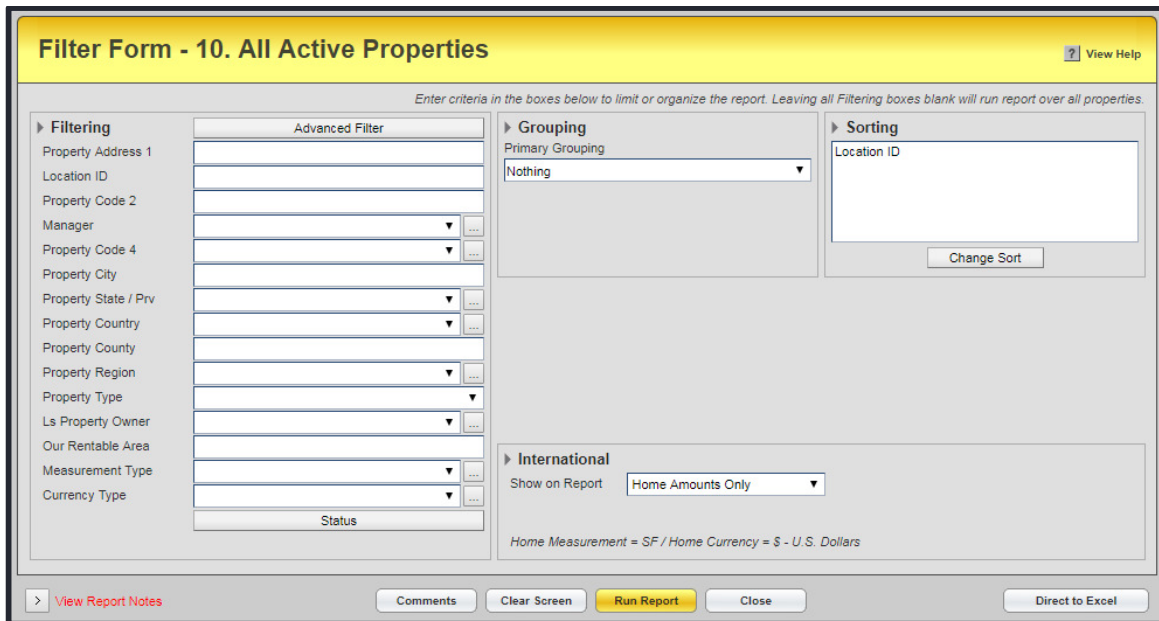
- 3) From any data entry screen, in the menu bar, click on the View menu and the first choice will take you to the ProLease Lease Admin Standard reports.



When you go to the standard reports, you will be on the following screen:



There are close to 140 standard ProLease reports. To run any report, click on the “Filter form button to the right or double click on any report title and it will take you to the filter form for that report. Below is the filter form for report #10 – All Active Properties”.



Depending on what type of report you are running (Abstract report, Critical Date report, Expense report etc.) the filter form will have different sections on it. In addition, there could be a few different boxes on the filter form from report to report.

To run any report, just click on the “Run Report” button at the bottom of the filter form. This will run an HTML report (Printable). If you would prefer to export the report to Excel, click on the “Direct to Excel” function. All reports can be exported to Excel except the Abstract reports. They are not column & row reports and therefore do not get exported to Excel.

Report Categories

Each of the standard reports has been categorized into one of the following 6 Report Categories:

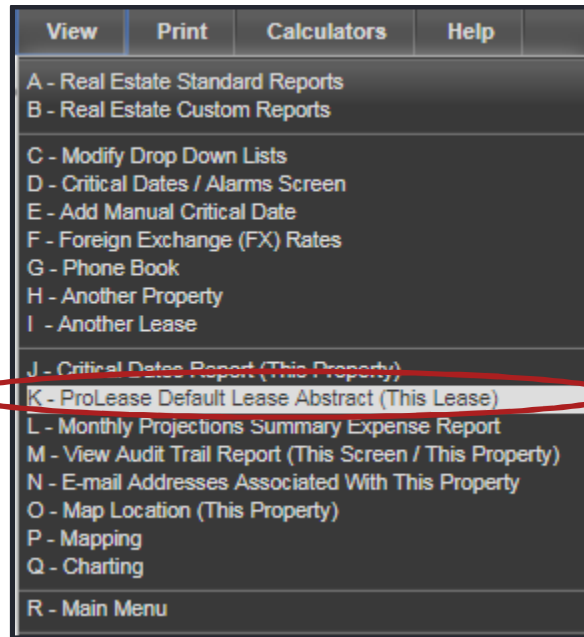
- 1) Abstract reports
- 2) Critical date reports
- 3) Miscellaneous reports
- 4) Expense reports
- 5) Maintenance reports
- 6) Capitalization Reports
- 7) Retail – sales info reports

1) Abstract Reports –

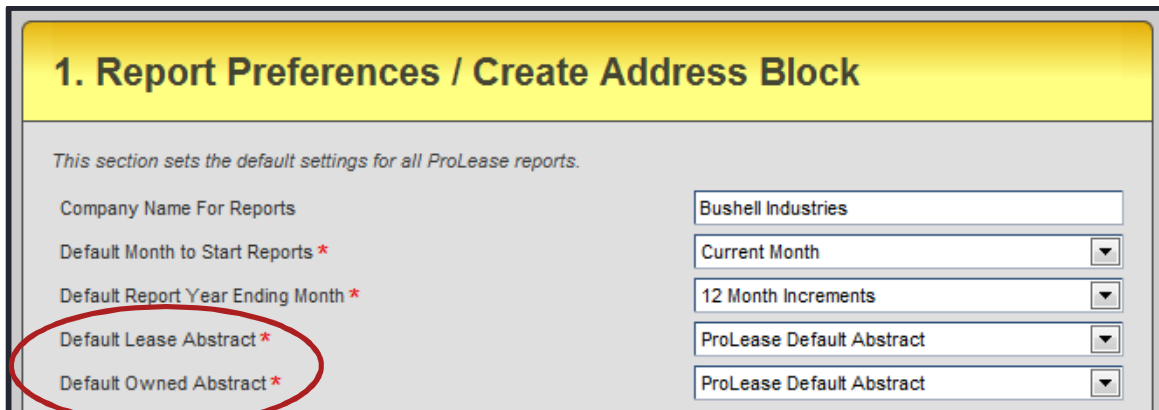
We have a lease abstract for leased properties and an owned abstract for owned properties. There is a ProLease “default” abstract report for both leased & owned properties. The default abstract basically has ALL the information for this property in the abstract. It is probably more information than anybody wants to look at so we also allow you to create an unlimited number of your own custom abstract reports. Each user can create an unlimited number of custom abstract reports. You can choose what data you want to see and in what order you want to see it.

IMPORTANT – When you create a custom abstract report, the information is separated into Property info, Lease info and Subspace info. You can choose what information you want to include in your custom abstract as well as the order you want to see it in however, all the Property info must appear first, Lease info second and Subspace info third. Within the Property, Lease & Subspace sections you can determine the order of the info you want to see.

When you are in the data entry screens for any property, you can run an abstract report for that property. In the menu bar, click on the VIEW menu, then click on choice K – ProLease Default Lease Abstract.



IMPORTANT – The abstract report that will run is the ProLease default abstract report. However, you can set one of your custom abstract reports to be the one that runs when the user clicks on this choice form within a property. This is done in the preferences section.

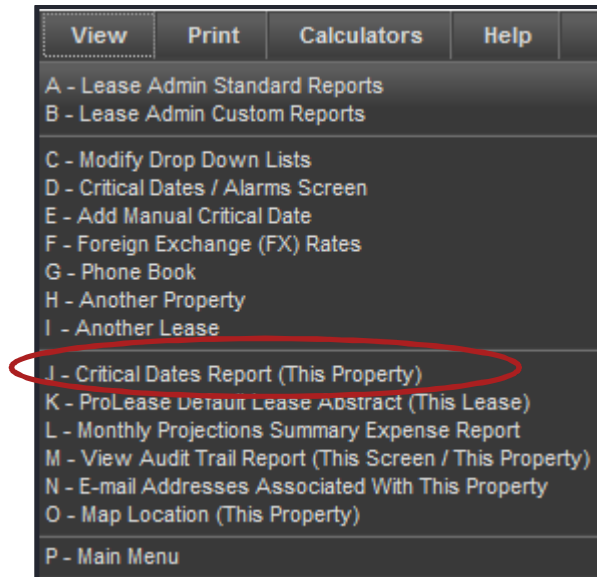


2) Critical Date Reports

As previously explained in this document, ProLease has an awesome critical date system. These reports will allow you to report on the critical dates you have entered in ProLease.

When you are on the filter form for a critical date report, it allows you to select a period of time that you want to show the critical dates for (i.e. I only want to see critical dates from 9/1/2017 8/31/2018. In addition, you can select which critical dates you would like to include in this report (i.e. lease expiration dates, renew, cancel, expand, contract, purchase options, security deposit etc.)

When you are on the data entry screens for any property, you can run a critical date report for the current property by clicking on the VIEW menu, then click on choice “J – Critical Dates Report This Property”.



The report that will run is the Critical Dates by Date report and it will automatically be filtered to only include critical dates you have in the current property.

3) Miscellaneous Reports

The Miscellaneous reports are, as the name implies, reports about a whole bunch of miscellaneous topics.

4) Expense Reports

Expense reports will allow you to report on all the expenses you have entered into ProLease. You can run the reports over any time period you want (1 month, 1 year, 5 years 6 years 8 months etc). Most of the expense reports come in two versions:

- Regular
- Detail

The detail reports will have the word “Detail” in the report title. If a report title does not say “Detail” in the title, it is a regular report. The regular reports will show you the total cost in any time period. The detail reports will break out every single line item so you can see how much each component (i.e. base rent, operating, taxes etc.) is.

5) Maintenance Reports

Maintenance reports are designed to help you identify potential conflicts in your database. You can run these reports once a month and you should hope that no data comes up. If anything shows up, it might require some action on your part. When you run any of these maintenance reports, there is a red prompt at the top that tells you what type of conflict this report was designed to identify.

6) Capitalization Reports

These reports will show your capitalization schedules at the portfolio level.

7) Retail – Sales Reports

These reports are for retailers that need to send reports to their landlords to show what their monthly sales have been.

Filtering Reports

The purpose of filtering reports is to tell ProLease which locations you want to include in this report as well as organize the data. I am not going to walk you through the filter forms of all 109 reports. I will just pick one expense report to show you the different sections of the filter form.

IMPORTANT – People will only be able to see properties in reports that their login allows them access to. If a user only has access to the Northeast Region, they will only be able to see properties in the Northeast Region when they run a report. The reports follow all login restrictions.

For purposes of this manual, I am going to use the filter form for report #20 – Remaining Liability 5 Year to explain the different sections of the filter form.

There are 7 sections to the filter form:

- 1) Date Info
- 2) Sorting
- 3) Grouping
- 4) Report Scope
- 5) Filtering
- 6) Included Expenses
- 7) International

1) Date Info – The dates can relate to different things depending upon what type of report you are running. If it is an expense report, you will only see expenses between these dates. If you are running a critical date report, you will only see critical dates between these two dates.

If you leave the end date blank, it will show the costs (or critical dates) from the start date till the end of the term.

2) Sorting – You can sort a report by any field in the report. You can enter an unlimited number of sorts.

3) Grouping – This function will allow you to create logical groupings and totals for each group. Grouping is really the first sort. If you group a report by State, all the states will appear in alphabetical order. Using the sorting function, you can then sort how the records will appear in a grouping. The screen shot below shows a report grouped by “State”. The blue line shows the state. The yellow line shows totals for that state.

Bushell Industries					21. Remaining Liability 5 Year - 9/1/2017 And Up							ABC Co		
E Properties		Run Date: 9/19/2017												
Prop Type	Property Address	First In House Contact	Prop Has Subtenant	Region	Our Rentable Area	# of Leases	Latest Expiration	1. Sep 17 to Aug 18	2. Sep 18 to Aug 19	3. Sep 19 to Aug 20	4. Sep 20 to Aug 21	5. Sep 21 to Aug 22	6. Sep 22 and Up	Total RL
Properties in Colorado:														
Lessed	676 17th Street Denver, CO 80519 United States 000005	Joe Saffron 303-772-7800	No	Midwest	201,052.00 SF	1	4/30/2021	\$3,437,032	\$3,550,095	\$3,666,960	\$2,503,982	0	0	\$13,156,069
Total for Colorado:		1 Property			201,052.00 SF	1		\$3,437,032	\$3,550,095	\$3,666,960	\$2,503,982	0	0	\$13,156,069
Properties in Florida:														
Lessed	5200 Brickell Drive Miami, FL 77189 United States 000011	Jan Meyers 305-696-5420	No	Southeast	13,000.00 SF	1	4/30/2016	0	0	0	0	0	0	0
Lessed	12249 Hyland Circle Soca Station, FL 33429 United States 000054		No		10,000.00 SF	1	8/30/2017	0	0	0	0	0	0	0
Total for Florida:		2 Properties			23,000.00 SF	2		0	0	0	0	0	0	0
Properties in Texas:														
Lessed	1101 Johnson Drive McGregor, TX United States 007719		No	Midwest	52,000.00 SF	1	4/30/2020	\$2,527,651	\$2,626,363	\$1,796,761	0	0	0	\$6,950,774
Lessed	14185 Dallas Parkway Dallas, TX 75206 United States 000015	Joe Francis 214-695-5529	No	Midwest	6,520.00 SF	1	3/31/2020	\$269,223	\$277,746	\$165,916	0	0	0	\$712,885
Total for Texas:		2 Properties			58,520.00 SF	2		\$2,796,874	\$2,904,109	\$1,962,677	0	0	0	\$7,663,659
Report Total:		5 Properties			282,572.00 SF	5		\$6,233,906	\$6,454,204	\$5,629,637	\$2,503,982	0	0	\$20,821,728

You can enter up to two groupings. For example, first group is by State, second group is by City.

4) Report Scope – Certain reports allow you to change the scope. Other reports are at a fixed scope. If you do not see the “Report Scope” drop down box on the filter form, it means that report is fixed at a certain scope. All of the expense reports allow you to switch the scope.

When you run a report at the SUBSPACE scope, that means that every record in the report represents one subspace. If you have a property that has three subspaces in it, that property will appear on this report three times. Once for each subspace.

When you run a report at the LEASE scope, that means that every record in the report represents one lease and it will add up all the info from all the subspaces in the that lease. If you have a property that has two leases in it, that property will appear on this report twice. Once for each lease.

When you run a report at the PROPERTY scope, it means that every record in this report represents one property and it will add up all the leases and subspaces in this property. If you have 100 properties in your database, this report will have 100 records. One for each property.

5) Filtering – Filtering allows you to determine which properties should be included or not included in this report. The filtering section has:

- Text fields
- Drop down lists
- Numeric fields

Filtering a report works exactly the same way as searching for a property which was explained earlier in this document.

6) Choose Expenses – This section only appears on expense reports. It allows you to select which expenses you want to include in the report. The default of all expense reports (except the GAAP straight line rent reports) is that they include “All” expenses. The GAAP reports only include base rent post free rent and any CPI / % per annum increase that you flag as should be straight lined.

7) International – This section allows you to decide what you want to show on the report. You have three choices:

- Local amounts only
- Home amounts only
- Local & home amounts

Local amounts will show all the local measurement & currency types (i.e. pounds, Yen, Euro, square meters, Pyongs, Tsubos etc.).

1. May 12 to Dec 12	2. Jan 13 to Dec 13	3. Jan 14 to Dec 14	4. Jan 15 to Dec 15	5. Jan 16 to Dec 16
EUR316,894	EUR479,265	EUR491,263	EUR499,676	EUR511,976

Home amounts will show all measurement and currency types converted to your home amount. ProLease allows you to select a Home measurement & currency type in the preferences section. Assuming you choose Square Feet and US\$, any other

measurement type or currency type that you enter into ProLease will be converted to square feet and US\$.

1. May 12 to Dec 12	2. Jan 13 to Dec 13	3. Jan 14 to Dec 14	4. Jan 15 to Dec 15	5. Jan 16 to Dec 16
\$418,933	\$633,586	\$649,448	\$660,570	\$676,830

Local & Home Amounts will show two rows for the measurement & currency type. The top row will be the local info, underneath it will be the home info.

1. May 12 to Dec 12	2. Jan 13 to Dec 13	3. Jan 14 to Dec 14	4. Jan 15 to Dec 15	5. Jan 16 to Dec 16
EUR316,894	EUR479,265	EUR491,263	EUR499,676	EUR511,976
\$418,933	\$633,586	\$649,448	\$660,570	\$676,830

This section also has a button labeled “FX Rates”.

▶ **International**

Show on Report ▼

Home Measurement = SF / Home Currency = \$ - U.S. Dollars

You can click on this button and look at the exchange rates for any currency in your database for any month.