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
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

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 Screen]

**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.

![View Help Button](image)

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

877-221-0229

or

support@prolease.com
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.
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.

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

![Drop Down Lists](image)

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.
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”:

![Property Owner Company](image)

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:

![Phone Book](image)

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 your 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:

![Phone Book Screen](image)

- 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.
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.
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:

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.
**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 and 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.
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.

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:

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

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

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

Sample Owned Property Data Entry Screen

Sample Subtenant Lease Data Entry Screen

Sample Project Data Entry Screen

Sample Equipment Data Entry Screen
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:
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.
**ADDITION 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:
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.

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.

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).

**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.

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 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.
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.
**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.
**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.
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.
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.
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.
**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.
**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](image-url)

<table>
<thead>
<tr>
<th>Name of Clause</th>
<th>Critical Date (CD)</th>
<th>Reminder Date (CD)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Roof Warranty</td>
<td>8/31/2017</td>
<td>2/1/2017</td>
</tr>
</tbody>
</table>

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:

![Lease Admin Manual Critical Date](image)

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.

![General Purchase Info](image-url)
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.

![Show menu]

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.
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:

![Real Estate - Standard Reports](image)

![Expenses - Monthly](image)

![Expenses - Quarterly](image)
<table>
<thead>
<tr>
<th>Report Category</th>
<th>Report Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>Expenses - Monthly</td>
<td>41. Payment Schedule</td>
</tr>
<tr>
<td>Expenses - Monthly</td>
<td>42. Subsequent Income Schedule</td>
</tr>
<tr>
<td>Expenses</td>
<td>43. Amounts Associated With Pay To Companies</td>
</tr>
<tr>
<td>Expenses - Cumulative</td>
<td>44. Leased Line Item Totals</td>
</tr>
<tr>
<td>Expenses - Cumulative</td>
<td>45. Owned Line Item Totals</td>
</tr>
<tr>
<td>Expenses - Multi Year</td>
<td>48. Fixed Rent Expense Detail (Not Straight Line)</td>
</tr>
<tr>
<td>OLD Straight Line Rent</td>
<td>47. OLD - Straight Line Rent - Annual</td>
</tr>
<tr>
<td>OLD Straight Line Rent</td>
<td>48. OLD - Straight Line Rent - Annual</td>
</tr>
<tr>
<td>OLD Straight Line Rent</td>
<td>49. OLD - Straight Line Rent - Monthly</td>
</tr>
<tr>
<td>OLD Straight Line Rent</td>
<td>50. OLD - Straight Line Rent - Monthly</td>
</tr>
<tr>
<td>OLD Straight Line Rent</td>
<td>51. OLD - 1 Month Straight Line Cumulative Differential</td>
</tr>
<tr>
<td>Expenses - Monthly</td>
<td>52. Free Rent Detail</td>
</tr>
<tr>
<td>Expenses - Annual</td>
<td>53. Cost Center Expenses by Subspace 1 Year</td>
</tr>
<tr>
<td>Expenses - Multi Year</td>
<td>54. Cost Center Expenses by Subspace 5 Year</td>
</tr>
<tr>
<td>Expenses</td>
<td>55. All Expenses</td>
</tr>
<tr>
<td>Expense</td>
<td>56. Monthly Projections and Variable Base Amounts Comments</td>
</tr>
<tr>
<td>NEW Straight Line Rent</td>
<td>57. 5 Year &amp; Up Straight Line Rent Report Non-Detail</td>
</tr>
<tr>
<td>NEW Straight Line Rent</td>
<td>58. 5 Year &amp; Up Straight Line Rent Report Detail</td>
</tr>
<tr>
<td>NEW Straight Line Rent</td>
<td>59. 10 Year &amp; Up Straight Line Rent Report Non-Detail</td>
</tr>
<tr>
<td>NEW Straight Line Rent</td>
<td>60. 10 Year &amp; Up Straight Line Rent Report Detail</td>
</tr>
<tr>
<td>NEW Straight Line Rent</td>
<td>61. 12 Month Straight Line Rent Report Non-Detail</td>
</tr>
<tr>
<td>NEW Straight Line Rent</td>
<td>62. 12 Month Straight Line Rent Report Detail</td>
</tr>
<tr>
<td>NEW Straight Line Rent</td>
<td>63. 1 Month Straight Line Rent Report Non-Detail</td>
</tr>
<tr>
<td>NEW Straight Line Rent</td>
<td>64. 1 Month Straight Line Rent Report Detail</td>
</tr>
<tr>
<td>NEW Straight Line Rent</td>
<td>65. SIL Schedules Where Data Has Been Changed After The Final Import Was Done</td>
</tr>
<tr>
<td>NEW Straight Line Rent</td>
<td>66. SIL Schedule Segments Where The Final Import Needs to be Run</td>
</tr>
<tr>
<td>Capitalization</td>
<td>67. Portfolio Compiled Monthly Schedule</td>
</tr>
<tr>
<td>Capitalization</td>
<td>68. Portfolio Compiled Subsequent Amortization Schedule</td>
</tr>
<tr>
<td>Capitalization</td>
<td>69. Portfolio 5 Year Lease Financial Statement</td>
</tr>
<tr>
<td>Capitalization</td>
<td>70. Portfolio 10 Year Lease Financial Statement</td>
</tr>
<tr>
<td>Capitalization</td>
<td>71. Portfolio Reconciliation Report</td>
</tr>
<tr>
<td>Capitalization</td>
<td>72. Portfolio 1 Month Report</td>
</tr>
<tr>
<td>Capitalization</td>
<td>73. Portfolio Cost Center Proportionate Share</td>
</tr>
<tr>
<td>Capitalization</td>
<td>74. Subspaces Associated with (and NOT with) a Capitalization Schedule</td>
</tr>
<tr>
<td>Capitalization</td>
<td>75. List of Capitalization Schedules</td>
</tr>
<tr>
<td>Capitalization</td>
<td>76. CAP Schedules Where Data Has Been Changed After The Final Import Was Done</td>
</tr>
<tr>
<td>Capitalization</td>
<td>77. CAP Schedule Segments Where The Final Import Needs to be Run</td>
</tr>
<tr>
<td>Capitalization</td>
<td>78. Lease Classification Tests</td>
</tr>
<tr>
<td>Capitalization</td>
<td>79. Lease Classification Tests Where The Final Import Needs to be Run</td>
</tr>
<tr>
<td>Capitalization</td>
<td>80. Lease Classification Tests That Have No Capitalization Schedule Associated With It</td>
</tr>
<tr>
<td>Report Category</td>
<td>Report Title</td>
</tr>
<tr>
<td>-----------------</td>
<td>------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Capitalization</td>
<td>81. Capitalization Schedules That Have No Lease Classification Tests Associated With It</td>
</tr>
<tr>
<td>Maintenance</td>
<td>82. Properties With Expenses Marked Information Only</td>
</tr>
<tr>
<td>Maintenance</td>
<td>83. Landlords / Sublandlords with Cash Contribution (TI) Balance Due</td>
</tr>
<tr>
<td>Maintenance</td>
<td>84. Our Subtenants with Cash Contribution (TI) Still Owed</td>
</tr>
<tr>
<td>Maintenance</td>
<td>85. Expired Leases Still Active</td>
</tr>
<tr>
<td>Maintenance</td>
<td>86. Expired Leases With Unrefundable Security Deposits</td>
</tr>
<tr>
<td>Maintenance</td>
<td>87. Subspaces With No Matching Lease Commencement or Expire Dates</td>
</tr>
<tr>
<td>Maintenance</td>
<td>88. All Companies in Phone Book That Are Not Being Used</td>
</tr>
<tr>
<td>Maintenance</td>
<td>89. Future Critical Dates in Inactive Properties</td>
</tr>
<tr>
<td>Maintenance</td>
<td>90. Active Subtenants in Inactive Properties</td>
</tr>
<tr>
<td>Maintenance</td>
<td>91. All Expenses with No Pay To Company</td>
</tr>
<tr>
<td>Miscellaneous</td>
<td>92. All Properties With No Company In Occupancy</td>
</tr>
<tr>
<td>Miscellaneous</td>
<td>93. Leases With Security Deposit</td>
</tr>
<tr>
<td>Miscellaneous</td>
<td>94. Cost Centers</td>
</tr>
<tr>
<td>Miscellaneous</td>
<td>95. Key Metrics</td>
</tr>
<tr>
<td>Miscellaneous</td>
<td>96. Key Metrics - Headcount by Cost Center</td>
</tr>
<tr>
<td>Miscellaneous</td>
<td>97. Key Metrics - Capacity by Cost Center</td>
</tr>
<tr>
<td>Miscellaneous</td>
<td>98. Headcount / Capacity</td>
</tr>
<tr>
<td>Miscellaneous</td>
<td>99. Companies In Occupancy</td>
</tr>
<tr>
<td>Miscellaneous</td>
<td>100. All of Our Brokers</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Report Category</th>
<th>Report Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>Miscellaneous</td>
<td>101. Tenant Cash / Capital Expense Contributions</td>
</tr>
<tr>
<td>Miscellaneous</td>
<td>102. Approval Names</td>
</tr>
<tr>
<td>Miscellaneous</td>
<td>103. All Companies in Phone Book</td>
</tr>
<tr>
<td>Miscellaneous</td>
<td>104. All Contacts In Phone Book</td>
</tr>
<tr>
<td>Miscellaneous</td>
<td>105. See Where All Companies in Phone Book Are Being Used</td>
</tr>
<tr>
<td>Miscellaneous</td>
<td>106. Companies Listed on Vendors Screen</td>
</tr>
<tr>
<td>Miscellaneous</td>
<td>107. Landlords / Sublandlords</td>
</tr>
<tr>
<td>Miscellaneous</td>
<td>108. Property Personnel (In-House Contacts, Landlords, Leasing Agents, Managing Agents)</td>
</tr>
<tr>
<td>Miscellaneous</td>
<td>109. Inactive Leases</td>
</tr>
<tr>
<td>Miscellaneous</td>
<td>110. All Properties One Line</td>
</tr>
<tr>
<td>Miscellaneous</td>
<td>111. Primary Use</td>
</tr>
<tr>
<td>Miscellaneous</td>
<td>112. Amendments</td>
</tr>
<tr>
<td>Miscellaneous</td>
<td>113. Additional Clauses</td>
</tr>
<tr>
<td>Miscellaneous</td>
<td>114. Email Alerts</td>
</tr>
<tr>
<td>Miscellaneous</td>
<td>115. Documents</td>
</tr>
<tr>
<td>Miscellaneous</td>
<td>116. Maintenance and Repair Items</td>
</tr>
<tr>
<td>Miscellaneous</td>
<td>117. Tenant Sends Notice To / Legal Notifications</td>
</tr>
<tr>
<td>Miscellaneous</td>
<td>118. Sublessor Sends Notices To / Legal Notifications</td>
</tr>
<tr>
<td>Miscellaneous</td>
<td>119. Foreign Exchange (FX) Rates</td>
</tr>
<tr>
<td>Miscellaneous</td>
<td>120. Pay To Companies</td>
</tr>
</tbody>
</table>
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.
<table>
<thead>
<tr>
<th>#</th>
<th>Critical Date</th>
<th>Action Name</th>
<th>Property Address</th>
<th>Lease Code</th>
<th>Lease Type</th>
<th>Lease Rentable Area</th>
<th>Lease Term</th>
<th>Person Responsible</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>5/30/2017</td>
<td>Lease Expiration Date</td>
<td>13547 West 130th St</td>
<td>A6005</td>
<td>Direct w/ LL</td>
<td>10,941 SF</td>
<td>1/1/2017 to 5/30/2017</td>
<td>1 year 2.69 months</td>
</tr>
<tr>
<td>2</td>
<td>10/2/2017</td>
<td>Sublease Expiration Reminder Date</td>
<td>13576 Santa Monica Blvd</td>
<td>A2054</td>
<td>Direct w/ LL</td>
<td>22,665 SF</td>
<td>9/24/2011 to 5/31/2013</td>
<td>11 years 10.60 months <strong>Multi exp date</strong></td>
</tr>
<tr>
<td>3</td>
<td>10/2/2017</td>
<td>Sublease Expiration Reminder Date</td>
<td>13576 Santa Monica Blvd</td>
<td>A2054</td>
<td>Direct w/ LL</td>
<td>22,665 SF</td>
<td>8/24/2011 to 5/31/2013</td>
<td>11 years 10.60 months <strong>Multi exp date</strong></td>
</tr>
<tr>
<td>4</td>
<td>11/1/2017</td>
<td>Landlord TI Expiration Reminder Date</td>
<td>13561 Arizona St</td>
<td>A0009</td>
<td>Direct w/ LL</td>
<td>25,000 SF</td>
<td>2/1/1986 to 1/31/2023</td>
<td>25 years 0 months</td>
</tr>
</tbody>
</table>
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:

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.

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.
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.

![Diagram](image1)

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.

![Diagram](image2)

**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.

![Diagram of Subspaces](image)
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.

![Diagram of lease and subspace]

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”.

**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 Screen]

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 subtenants name is Sirus 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.
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

**Property Information**

<table>
<thead>
<tr>
<th>Measurement</th>
<th>Square Foot</th>
<th>Currency</th>
<th>U.S. Dollars</th>
</tr>
</thead>
<tbody>
<tr>
<td>Address 1</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Address 2</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Property Name</td>
<td>The Empire State Building</td>
<td></td>
<td></td>
</tr>
<tr>
<td>City</td>
<td>New York</td>
<td>State / Pw</td>
<td>NY</td>
</tr>
<tr>
<td>Zip</td>
<td>10022</td>
<td>County</td>
<td>Manhattan</td>
</tr>
<tr>
<td>Country</td>
<td>United States</td>
<td>Region</td>
<td>Northeast</td>
</tr>
<tr>
<td>Main Phone</td>
<td>312-500-0000</td>
<td>Suite</td>
<td></td>
</tr>
</tbody>
</table>

**All Leases In Property**

<table>
<thead>
<tr>
<th>Tenant Type</th>
<th>Lease Agreement</th>
<th>Commences</th>
<th>Expires</th>
<th>Today's RSP</th>
</tr>
</thead>
<tbody>
<tr>
<td>Direct LE</td>
<td>Bushell Industries, Inc</td>
<td>11/1/2010</td>
<td>10/10/2021</td>
<td>25,000.00</td>
</tr>
<tr>
<td>Subtenant</td>
<td>Mission Health</td>
<td>9/1/2017</td>
<td>10/10/2021</td>
<td>4,000.00</td>
</tr>
</tbody>
</table>

Our RSP: 29,000.00
Subtenant RSP: 4,000.00
Net RSP: 25,000.00
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.

<table>
<thead>
<tr>
<th>Go to:</th>
<th>Data Level</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 General Property Info</td>
<td>Property</td>
</tr>
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<td>2 Property Owner Company</td>
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<tr>
<td>3 Leasing Agent Company</td>
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<td>7 Property Level Custom Fields</td>
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<tr>
<td>8 Projects &amp; Assets Associated with Property</td>
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<td>11 Total Expenses In This Property</td>
<td>Property</td>
</tr>
<tr>
<td>12 Capitalization Schedules</td>
<td>Property</td>
</tr>
<tr>
<td>13 General Lease Info</td>
<td>Lease</td>
</tr>
<tr>
<td>14 Lease Terms / Options</td>
<td>Lease</td>
</tr>
<tr>
<td>15 Rentable Area / Subspaces</td>
<td>Subspace</td>
</tr>
<tr>
<td>16 Base Rent</td>
<td>Subspace</td>
</tr>
<tr>
<td>17 Free Rent</td>
<td>Subspace</td>
</tr>
<tr>
<td>18 CPI &amp; Percentage Increases</td>
<td>Subspace</td>
</tr>
<tr>
<td>19 Operating Expenses &amp; CAM</td>
<td>Subspace</td>
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<tr>
<td>20 Real Estate Taxes</td>
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<td>24 Management Fee</td>
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<tr>
<td>25 Occupancy / Sales Tax</td>
<td>Subspace</td>
</tr>
<tr>
<td>26 Retail - % Rent</td>
<td>Subspace</td>
</tr>
<tr>
<td>27 Allocations</td>
<td>Subspace</td>
</tr>
<tr>
<td>28 Landlord TI / Tenant Contributions</td>
<td>Subspace</td>
</tr>
<tr>
<td>29 Subspace Level Custom Fields</td>
<td>Subspace</td>
</tr>
<tr>
<td>30 Tenant’s Broker</td>
<td>Lease</td>
</tr>
<tr>
<td>31 Security Deposit</td>
<td>Lease</td>
</tr>
<tr>
<td>32 Insurance / Asset Replacement Cost</td>
<td>Lease</td>
</tr>
<tr>
<td>33 Sublease / Assignment Rights</td>
<td>Lease</td>
</tr>
<tr>
<td>34 Tenant Sends Official Notices To</td>
<td>Lease</td>
</tr>
<tr>
<td>35 Landlord Sends Official Notices To</td>
<td>Lease</td>
</tr>
<tr>
<td>36 Holdover Costs / Restoration</td>
<td>Lease</td>
</tr>
<tr>
<td>37 Amendments</td>
<td>Lease</td>
</tr>
<tr>
<td>38 LL Relocation / Audit Rights / Late Fees</td>
<td>Lease</td>
</tr>
<tr>
<td>39 Maintenance and Repair</td>
<td>Lease</td>
</tr>
<tr>
<td>40 Additional Clauses</td>
<td>Lease</td>
</tr>
<tr>
<td>41 Lease Level Custom Fields</td>
<td>Lease</td>
</tr>
<tr>
<td>42 Key Metrics</td>
<td>Lease</td>
</tr>
<tr>
<td>43 Documents</td>
<td>Lease</td>
</tr>
<tr>
<td>44 E-Mail Reminders</td>
<td>Lease</td>
</tr>
</tbody>
</table>
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:
**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 anoptional 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”.


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

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:

![Change Rentable Area](image)

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.
Above is a screenshot 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?).

<table>
<thead>
<tr>
<th>Go to:</th>
<th>Data Level</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 General Property Info</td>
<td>Property</td>
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<tr>
<td>26 Retail - % Rent</td>
<td>Subspace</td>
</tr>
</tbody>
</table>
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.
**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.

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).
### 15. Rentable Area / Subspaces

<table>
<thead>
<tr>
<th>SS #</th>
<th>Reason for Subspace</th>
<th>Property Use</th>
<th>Subspace #</th>
<th>tours</th>
<th>Subspace Status</th>
<th>Subspace Completion</th>
<th>Subspace Entry</th>
<th>Next Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Overall Subspace</td>
<td>Office</td>
<td>0-00-20</td>
<td>Juke 133</td>
<td></td>
<td>5/1/2015</td>
<td>7/1/2021</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Unoutside primary 100</td>
<td>Storage</td>
<td>2-000-3D</td>
<td>Basement</td>
<td></td>
<td>5/1/2014</td>
<td>7/1/2021</td>
<td></td>
</tr>
</tbody>
</table>
**Entering Base Rent (Screen #16) / Free Rent (Screen #17)**

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

![Base Rent Screen](image)

**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.

![Subspace Bar](image)

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

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

![Base Rent Screen](image)

**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:

![Base Rent Screen]

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

![Free Rent Screen]

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](image)

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:
**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 ($0.50 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:

<table>
<thead>
<tr>
<th>16. Base Rent</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Select a Subspace - 2 Subspaces</strong></td>
</tr>
<tr>
<td><strong>Data Entry</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>From</th>
<th>To</th>
<th># of Months</th>
<th>PSF Per Year</th>
<th>Annual Amount</th>
<th>Monthly Amount</th>
<th>Delete</th>
</tr>
</thead>
<tbody>
<tr>
<td>5/1/2016</td>
<td>7/31/2016</td>
<td>3.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>Delete</td>
</tr>
<tr>
<td>8/1/2016</td>
<td>7/31/2017</td>
<td>12.00</td>
<td>$30.00</td>
<td>$300,000.00</td>
<td>$25,000.00</td>
<td>Delete</td>
</tr>
<tr>
<td>8/1/2017</td>
<td>7/31/2018</td>
<td>12.00</td>
<td>$30.90</td>
<td>$309,000.00</td>
<td>$25,750.00</td>
<td>Delete</td>
</tr>
<tr>
<td>8/1/2018</td>
<td>7/31/2019</td>
<td>12.00</td>
<td>$31.83</td>
<td>$318,270.00</td>
<td>$26,522.50</td>
<td>Delete</td>
</tr>
<tr>
<td>8/1/2019</td>
<td>7/31/2020</td>
<td>12.00</td>
<td>$32.78</td>
<td>$327,818.10</td>
<td>$27,318.10</td>
<td>Delete</td>
</tr>
<tr>
<td>8/1/2020</td>
<td>7/31/2021</td>
<td>12.00</td>
<td>$33.77</td>
<td>$337,652.64</td>
<td>$28,137.72</td>
<td>Delete</td>
</tr>
</tbody>
</table>

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:

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.

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.

**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](image)

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.
**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.

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

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.

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.

![General Lease Info Screen]

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

![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, 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”

![ProLease Main Menu](image)

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

![Data Entry Screen](image)

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.

![Menu Bar](image)
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”.}

![Filter Form - 10. All Active Properties](image)
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.

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.).

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

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>$418,933</td>
<td>$633,586</td>
<td>$649,448</td>
<td>$660,570</td>
<td>$676,830</td>
</tr>
</tbody>
</table>

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.

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>EUR316,894</td>
<td>EUR479,265</td>
<td>EUR491,263</td>
<td>EUR499,676</td>
<td>EUR511,976</td>
</tr>
<tr>
<td>$418,933</td>
<td>$633,586</td>
<td>$649,448</td>
<td>$660,570</td>
<td>$676,830</td>
</tr>
</tbody>
</table>

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

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