

Lease Maintenance:

Lease setup in PM2000 is as easy as 1-2-3.

1. Select the Property and Unit the Tenant will be occupying.
2. Accept the default charges and deposits (setup in Unit Maintenance) or modify them for this lease.
3. Select a Move-In date.

Once a lease has been setup, the Lease Maintenance screen allows managers to monitor and maintain leases as well as analyze the tenant's current financial standing.

Using the quick reference portion of the screen, managers can quickly view Lease Start and End dates, Current Rent and the date of the last increase, and the Next

and Last Billing dates.

Using the buttons on the right side of the screen, managers can print the current lease (Quick Print), schedule escalations (Setup), and enter lease specific information in user defined fields (Additional).

Additional lease activities can be performed here including the setup of Reimbursement



options for CAM/Reimbursement allocation and billing, and Late Fee Assessment Setup. Additional functionality including the ability to view all invoiced charges along with payments is also available through the Charge Payments button.

Quick Facts

- Lease Maintenance provides drill-down information about deposits held.
- Tenants can have an unlimited number of leases setup.
- View all Invoiced charges and payment history
- Override standard late fee assessment on a lease by lease basis.

Helpful Hints

- Using the Co-Tenant capability of PM2000 managers can setup the government as a co-tenant to track the amount due from both the physical tenant and the government.
- **Unlimited Leases per Tenant** allows managers to bill Tenants with multiple leases on a single Invoice.

Reports with this data:

- *Tenant Allocation Setup Report*
- *Lease Abstract Report*
- *Lease Expiration Report*
- *Detailed Rent Roll Report*
- *Lease Deposit Report*

Lease Setup & Maintenance

Tenant Maintenance window showing fields for Property, Unit, Rent Due, Other Due, Deposits Held, Date of Last Increase, Date of Next Increase, Current Rent, Other Charges, Square Footage, Price / Square Foot, and Lease Start/End Dates. Buttons for Quick Print, Setup, Chg Prnts, and Reburse are highlighted.

Lease Printing

Using the Quick Print button managers can design and print custom lease forms using any field in the Lease Maintenance Tab.

Lease Setup

The Setup Button forwards the user to the Recurring Charges and Deposits Maintenance screen where recurring lease charges and escalations can be setup.

Additional

Users can setup User Defined Fields for additional lease information.

Transaction's Detail window showing a table of transactions sorted by Invoice Date. Summary table below:

| Trans Code | Description | Balance | Charges Due | Prepayments | Net Balance |
|------------|----------------|----------|-------------|-------------|-------------|
| FINCHG | FINANCE CHARGE | 202.00 | 8,548.51 | | |
| RENT | RENT REVENUE | 7,399.97 | | .00 | |
| PARKIN | PARKING RENTS | 130.00 | | | |
| PROP | PROPERTY TAXES | 236.54 | | | |

Charge Payments

The Charge Payments button forwards the user to the Transaction Detail History Screen. This screen displays all invoiced charges and payments for a tenant.

Users can sort by Invoice Date, Invoice Number, Transaction Type, and Check Number.

This screen can be printed in report form to review with Tenants, onsite managers, or owners as needed.

Reimbursement Options window showing settings for Default Proration of Reimbursables, Lease Allocation Code Maintenance, and Allocation Code table.

| Allocation Code | Description | Billing | Property % | Project % |
|-----------------|----------------|---------|------------|-----------|
| MAINT | MAINTENANCE | Month | 19.11% | .00% |
| PROP | Property Taxes | Months | 19.11% | .00% |

Reimbursement Options

Assign Reimbursements (CAM) to each lease based on calculated square footage, percent, or override amounts. Also assign the Allocation Codes to be tracked for each lease.

Allocation History window showing a table of charges to tenant and prorated disbursements by month.

| Month | Charged To Tenant | Prorated Disbursements |
|-----------|-------------------|------------------------|
| January | .00 | .00 |
| February | .00 | .00 |
| March | 255.21 | .00 |
| April | .00 | .00 |
| May | .00 | .00 |
| June | 126.54 | 98.89 |
| July | .00 | .00 |
| August | .00 | .00 |
| September | 387.95 | .00 |
| October | .00 | 488.69 |
| November | .00 | 967.44 |
| December | 561.89 | .00 |
| Totals | 1,331.59 | 1,556.02 |

Allocation History

View Tenant Reimbursement History. Managers can review the allocated versus actually charged allocations by month.