

# PLAN DATA DEMO INSTRUCTIONS

PlanData Systems Corporation / 11 Stewart Avenue / Suite 200 / Huntington, NY 11743

## LeaseMan Software

### Overview / PlanData's LeaseMan Software

PlanData's LeaseMan software is designed to help the user **track critical property-related information for easier management of his or her leases**. This documentation provides you with instructions for learning the capabilities of PlanData's LeaseMan software. For more detailed information, please refer to the **Help/Contents** selection located on the main menu bar. The demonstration is a full-working copy of LeaseMan, with the exception of a limitation on the number of leases provided, so that you can fully evaluate all the features of the software. Also, should you feel it necessary, it is possible to add two new leases onto the program so that you can test LeaseMan's features on your own property records. During this demonstration, we will introduce you to some of LeaseMan's features, including:

- ☞ Alerts
- ☞ Tree View Diagrams
- ☞ The Summary Menu
- ☞ User Definable Data
- ☞ Action Items

### Ordering LeaseMan

The demonstration version of LeaseMan can be upgraded to a fully functional version by obtaining a valid serial number from PlanData. PlanData has designed the installation process so that you will not have to re-install the software upon program purchase.

### Some Technical Notes

Before you start running the enclosed demonstration version of PlanData's LeaseMan software, take note of the following minimum requirements for running LeaseMan. In general, the more power and RAM your computer has, the better the program's performance will be.

The minimum requirements are:

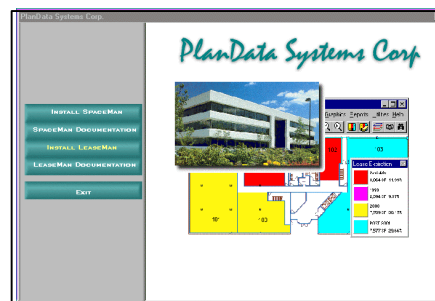
- ☞ Pentium Processor, 300MHZ (or higher)
- ☞ 32 MB RAM (64 MB recommended) with 35 MB Free Disk Space

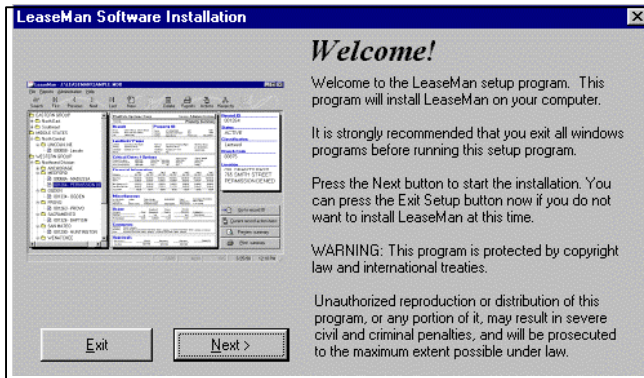
### Installation

The user agrees to any and all licensing stipulations as stated in the installation procedure.

#### To install LeaseMan:

- ☞ Place the **PlanData** CD in your CD-ROM drive.  
Select "**Install LeaseMan.**"
- ☞ Follow the prompts of the installation program.
- ☞ To view & print documentation simply click on **LeaseMan Documentation** at the main install screen.
- ☞ You may be asked to reboot the computer before installation can be completed.
- ☞ A password is not necessary when using the demo program.



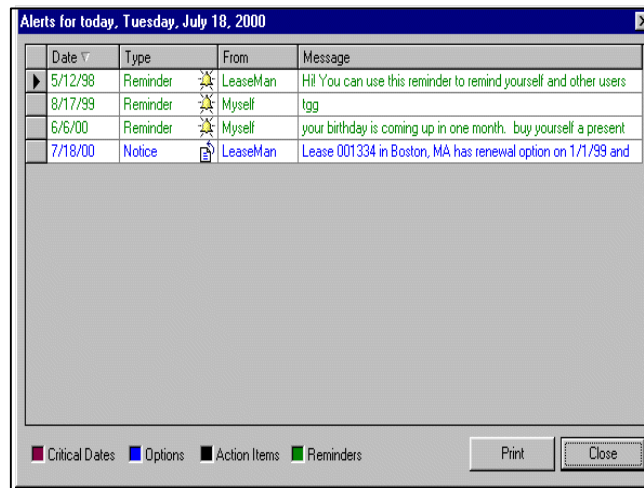


## About LeaseMan

LeaseMan concentrates on the most volatile data associated with real estate data - Critical Dates - although you can track many other aspects of a property as well, including financials, contacts, and user-defined data, among others. LeaseMan is built "on top of" a relational database, which gives the user maximum flexibility.

## The Demonstration Version of LeaseMan

Use this Demonstration Version of LeaseMan to evaluate the powerful tools included in the software. **Please note that it is possible to corrupt the enclosed sample databases by performing operations that an otherwise properly trained operator would not perform.** For this reason, we have provided the following tutorial to guide you through some of the basic features.



## Getting Started

Click *Start > Programs > LeaseMan > LeaseMan 32* from the menu. If you encounter any difficulties, please contact PlanData at 1.800.757.BLDG (2534).

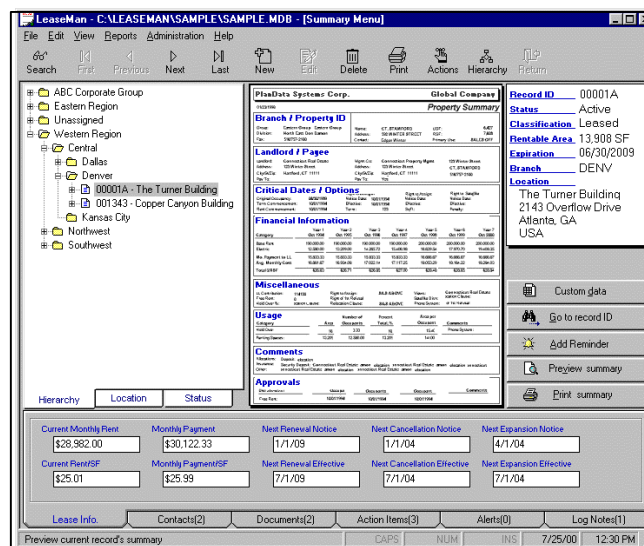
## The Alerts for today Dialogue box.

LeaseMan allows you to set up three types of alerts, which will appear at the opening screen each time you run the program.

The types of Alerts are:

- ☒ Legally defined lease dates
- ☒ Lease related action items
- ☒ Reminders

Alerts on action items and lease dates are generated automatically based on user-defined configuration settings. By default, the Alerts screen appears at Startup. In order to access the screen at any other time select **Alerts** from the **View** pull-down menu.



## The Main Menu

LeaseMan organizes the most pertinent information to be "at your fingertips" on the Main Menu.

The Main Menu is broken down into 5 areas:

- ☒ Pull Down Menus
- ☒ Toolbar
- ☒ ID Box
- ☒ Reference Tabs
- ☒ Tree View

As in most Windows applications, LeaseMan uses a pull-down menu and a toolbar which have duplicate functions. For the purposes of these demonstration instructions we will describe the most efficient methods of operating LeaseMan (i.e. the fewest number of steps to achieve the same result).

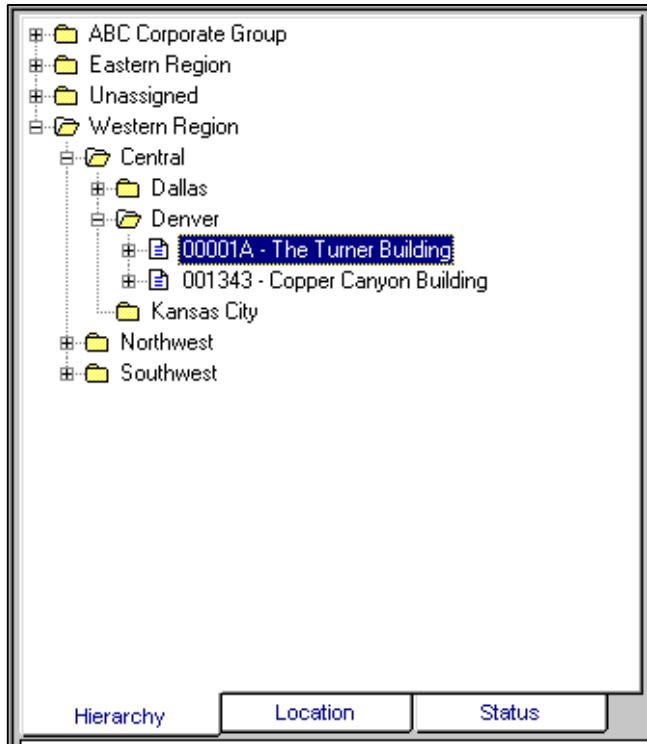
<b>Record ID</b>	00001A
<b>Status</b>	Active
<b>Classification</b>	Leased
<b>Rentable Area</b>	13,908 SF
<b>Expiration</b>	06/30/2009
<b>Branch</b>	DENV
<b>Location</b>	The Turner Building 2143 Overflow Drive Atlanta, GA USA

**ID Box**

Current Monthly Rent \$28,982.00	Monthly Payment \$30,122.33	Next Renewal Notice 1/1/09	Next Cancellation Notice 1/1/04	Next Expiration Notice 4/1/04
Current Rent/SF \$25.01	Monthly Payment/SF \$25.99	Next Renewal Effective 7/1/09	Next Cancellation Effective 7/1/04	Next Expiration Effective 7/1/04

Lease Info    Contacts(2)    Documents(2)    Action Items(3)    Alerts(0)    Log Notes(1)

**Reference Tabs**



Tree View

**ID Box**

The upper right-hand corner of the main screen displays the active property (as selected on the Tree View) along with some important information regarding property identification.

**Reference Tabs**

The Reference Tabs bring key information regarding the active property to the main screen.

**The Tree View**







The Tree View is designed to allow you to easily navigate through your property records, along with any documents or contact records that you might have “attached” to a property record. Using the tabs at the bottom of the Tree View, you can navigate through your property records by the hierarchical organization (that you can set up), by location or by status of the record.

**To Select a Property:**

Double click on a level one folder in the Hierarchy view (ex. Eastern Region).

1. Double click on the second level folder (ex. Southeast division) to expand the tree.
2. Double click on the third level folder (ex. Atlanta) Upon completion of expanding the tree, click on a file. The **Property Summary** report and **Record ID** will be designated to this file.

**Icon descriptions**

-  Active lease/owned property
-  Preliminary lease
-  Canceled lease
-  Archived lease
-  Assigned contact - You can assign unlimited contacts to records
-  Attached document - You can attach unlimited spreadsheets, presentations, etc., to the records.

**PlanData Systems Corp.** Data

01021790 **Property Summary**

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**Branch / Property ID**

Group: Eastern Group	Eastern Group	Name: CT, STAMFORD	USF: 6:ET
Division: North Conn Don Simon		Address: 300 WINTER STREET	RSF: 7:AB
Fax: 562757-2100		Contact: Edgar Wistar	Primary Use: SALES OFF

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**Landlord / Payee**

Landlord: Connecticut Roof Details	Mgmt Co: Connecticut Property Mgmt	123 Winter Street
Address: 123 Winter Street	Address: 123 Winter Street	CT, STAMFORD
City/State/Zip: Hartford, CT 06111	City/State/Zip: Hartford, CT 06111	562757-2100
Fax To:	Fax To:	

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**Critical Dates / Options**

Original Occupancy: 06/30/1999	Notice Date: 10/01/1998	Right to Assign: Notice Date:	Right to Assign: Notice Date:
Term Commencement: 10/01/1998	Term: 123	Effective: 12/31	Effective: 12/31
Rent Commencement: 10/01/1998		Party:	

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**Financial Information**

Category	Year 1 Oct 1998	Year 2 Oct 1999	Year 3 Oct 2000	Year 4 Oct 2001	Year 5 Oct 2002	Year 6 Oct 2003	Year 7 Oct 2004
Base Rent	190,000.00	190,000.00	190,000.00	200,000.00	200,000.00	200,000.00	200,000.00
Electric	12,300.00	12,300.00	14,265.72	15,000.00	16,000.00	17,000.70	17,000.00
Gas	15,000.00	15,000.00	15,000.00	15,000.00	16,000.00	16,000.00	16,000.00
Water	16,000.00	16,000.00	17,000.00	17,171.25	18,000.00	18,180.00	18,280.00
TOTAL	133,300.00	133,300.00	136,265.72	137,171.25	144,000.00	143,260.70	143,360.00

---

**Miscellaneous**

LL Contribution: 118130	Right to Assign: 0	Right to Assign: 0	Right to Assign: 0	Right to Assign: 0	Right to Assign: 0	Right to Assign: 0	Right to Assign: 0
Free Rent: 0	Right to Refuse: 0	Right to Refuse: 0	Right to Refuse: 0	Right to Refuse: 0	Right to Refuse: 0	Right to Refuse: 0	Right to Refuse: 0
Hold Over %: 0	Relocation %: 0	Relocation %: 0	Relocation %: 0	Relocation %: 0	Relocation %: 0	Relocation %: 0	Relocation %: 0

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**Usage**

Category	Area	Number of Occasions	Percent Total	Area per Occasion	Comments
Hold Over		333	18	15.64	Phone System
Parking Spaces		12,267	13,251	100.00	

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**Comments**

Miscellaneous: Duplicate location  
 Inquiries: Security Features: Connecticut Roof Details amon elevation Connecticut Roof Details amon elevation Connecticut  
 Other: Connecticut Roof Details amon elevation Connecticut Roof Details amon elevation

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**Approvals**

Site Address:	Area:	Occupants:	Occupants:	Comments:
Free Rent:	10/01/1998	10/01/1998	10/01/1998	

## Property Summary Menu

One of the best features of LeaseMan is the single page lease abstract which breaks a lease down to its most important elements. PlanData has taken this concept further in LeaseMan by using this summary as the main menu. In other words, if the user can find the information on the sheet of paper (the lease summary) then he or she can find it in LeaseMan by clicking on the section that he or she wants to work with. Following are brief instructions to demonstrate this:

1. Click on the area of the "report" that you want to view, and the appropriate dialogue box will appear.
2. Click on the **Edit** icon to make changes to the field.
3. Click on the **Save** icon to complete changes

The **cancel** icon will erase all changes.

Following is a brief review of each section of the summary menu:

Please note, the Property Summary sections will differ depending on whether the property is owned or leased. For the purpose of these demonstration instructions, we will focus on lease related data.

**LeaseMan - C:\LEASEMAN\SAMPLE\SAMPLE.MDB - [Identification]**

File Edit View Reports Administration Help

Search Find Previous Next Left New Edit Delete Print Actions Help Return

RecordID: 00001A	Branch: DENV	Building Name: The Turner Building	Classification: Leased	Status: ACTIVE
Group: Western Region	Address: 2143 Overflow Drive	USF: 11400	RSF: 13900	
Division: Central	City/State/Zip: Atlanta GA 31208	Add Factor %: 22	Loss Factor %: 18.03	
Name: Denver	Country: USA	Storage: 0	Building RSF: 750000	
Address: 8000 Rocky Mountain Highway	Building phone: 770 555 5555	Pro Rata Share %: 1.85		
City/State/Zip: Denver CO 80000	Building fax: 770 555 5556	Master ID:		
Contact: R. Denver	Contact name: Henry Aaron	Primary Use: SALES OFF		
Phone: 303 555 5555	Contact position: Sluggler	Legal Entry:		
	Contact phone: 770 555 5555	Last Updated: 7/18/00, 4:14 PM by DEMO		

Click on a section to go to view and modify the data

CAPS NUM INS 7/25/00 12:32 PM

## Branch / Property ID

The basic information regarding a property is located in the right-hand column of the **Branch/Property ID** screen. Some key features to note:

- You can tie property records to master Ids from subleases, etc.
- Automatic calculations for Add/Loss factors and pro-rata share which can be overwritten by the user

**LeaseMan - C:\LEASEMAN\SAMPLE\SAMPLE.MDB - [Landlord/Payee]**

File Edit View Reports Administration Help

Search Find Previous Next Left New Edit Delete Print Actions Help Return

RecordID: 00001A	Landlord: Outer Edge Partners	Mgmt Co: Outer Edge Management Company	Legal Notice: Dewoe, Cheatham & Howe
Address: One Suburb Drive Suite 1400	Address: One Urban Center Suite 100	Address: One Legal Street Suite 500	
City/State/Zip: Macon GA 31909	City/State/Zip: Atlanta GA 39999	City/State/Zip: Atlanta GA 39999	
Contact name: P.W. Herman	Contact name: Jim Kirk	Contact name: J. Will Cheatham	
Phone/Fax: 516/757-2100	Phone/Fax: 516/757-2100	Phone/Fax: 555 555 5555	
		555 555 5555	

Payment To  Yes  No    Payment To  Yes  No    Payment To  Yes  No

Current CPR	Current Real Estate Taxes	Current Operating Expenses	Current Porters Wage
Date: 0	Date: 0	Date: 0	Date: 0
Amount: 0	Amount: 0	Amount: 0	Amount: 0

Click on a section to go to view and modify the data

CAPS NUM INS 7/25/00 12:33 PM

## Landlord / Payee

To modify the **Landlord/Payee** data screen, click on the **Landlord/Payee** section of the Property Menu. Click on the **Edit** icon to change fields where you can change information such as the landlord, the management company, or another organization involved with the property. This section also allows you to enter which of the three will receive payment for this particular record. Note that you can modify each of the column headers in this section.

When finished, click on the **Save** icon and then the **Return** icon, located on the toolbar.

LeaseMan - C:\LEASEMAN\SAMPLE\SAMPLE.MDB - [Critical Dates/Options]

File Edit View Reports Administration Help

Search First Previous Next Last New Edit Delete Print Actions History Return

RecordID: 00001A

Type	Notice Date	Effective Date	Exercise Date	Stipulation	Comments
✖ Cancellation	01/01/2004	7/1/04		40000	
✚ Expansion	04/01/2004	7/1/04		5000	
✚ Renewal	01/01/2009	7/1/09		5 years	

Effective any date after 7/1/04

Type: Cancellation Note: Action Taken: Penalty: 40000 Paragraph: Comments: Exercised Date: Original Occupancy: 07/01/1989 Term Commencement: 07/01/1999 Lease Commencement: 07/01/1999 Term Expiration: 05/30/2009

Comments: Renewed original lease for 10 yrs. Month to Month

Click on a section to go to view and modify the data CAPS NUM INS 7/25/00 12:34 PM

## Critical Dates / Options

This section is the most important of all since it is where the most crucial information regarding leases is located - lease dates. These dates are incorporated into the Critical Lease Date report. To work with critical lease dates, click on the **Critical Dates / Option** section of the Property Summary.

There are four dates that appear one time for any given lease. They are:

- ✚✚ Original Occupancy
- ✚✚ Term Commencement
- ✚✚ Rent Commencement
- ✚✚ Term Expiration

In addition to these, you can have an unlimited number of options attached to each lease of the following types:

- ✚✚ Renewal Options
- ✚✚ Cancellation Options
- ✚✚ Expansion Options

Add New Option

Type: Cancellation

Penalty: Paragraph: Note: Comments:

Effective Date

One time on Starting: Ending:  Monthly on day of every month(s) Starting: Ending:  Any day after

Notice Date

Days prior to effective date  Months prior to effective date 0  On specific date

Add Cancel Help

You can also use this screen to flag if a lease is on a month-to-month basis. This information will print up on the Summary Report for leases which are month-to-month. In addition, the Lease Commitment report will show this record as 0, but the Annual Obligation Report will carry any value entered into the Financial Section for this record. These can be found under **Reports** at the top of the main screen.

## Option Dates

The following options are handled by LeaseMan :

**Option to renew, Options to expand, Option to cancel lease.** A lease can have any number of these options, and the software gives you great flexibility when scheduling options over the lifetime of a lease. Therefore, while some options can be "one-time" options, others can be recurring or available to a tenant at any time after a specified date. Each option has three dates associated with it - **Notice Date**, when a tenant should be reminded of an approaching option; **Effective Date**, when an option takes effect; and **Exercise Date**, the date that an option was exercised.

Add New Option

Type: Cancellation

Penalty: Paragraph: Note: Comments:

Effective Date

One time on Starting: Ending:  Monthly on day 1 of every 12 month(s) Starting: 07/05/2001 Ending: 07/31/2005  Any day after

Notice Date

Days prior to effective date 3  Months prior to effective date  On specific date 07/02/2001

Add Cancel Help

To add an option to a lease, go to the **Critical Dates /Options** section and click on the **New** button on the main toolbar. A form will appear on the screen, allowing you to enter all necessary option information and specify option's dates. Under **Type**, there will be three options available, obtained by clicking on the list box.

## Recurring Options

LeaseMan provides tools so that the user can make one entry for options that recur (i.e. annual options to renew or cancellation options "any time after" a certain date).

LeaseMan - C:\LEASEMAN\SAMPLE\SAMPLE.MDB - [Financial Information]

RecordID: 00001A

Cost Code	Pay LL	Year 1 Jul 1999	Year 2 Jul 2000	Year 3 Jul 2001	Year 4 Jul 2002	Year 5 Jul 2003	Year 6 Jul 2004
Base Rent	Y	\$347,784.00	\$347,784.00	\$393,180.00	\$393,180.00	\$393,180.00	\$393,180.00
Electric	N	\$11,844.00	\$12,579.96	\$12,579.96	\$13,209.00	\$13,209.00	\$13,869.00
Operating Exp.	N	\$1,000.00	\$1,100.00	\$1,200.00	\$1,500.00	\$1,600.00	\$1,700.00
Annual Cost		\$360,628.00	\$361,463.96	\$406,959.96	\$407,889.00	\$407,989.00	\$408,749.00
Mo. Payment to LL		\$28,882.00	\$28,882.00	\$32,765.00	\$32,765.00	\$32,765.00	\$32,765.00
Avg. Monthly Cost		\$30,052.33	\$30,122.00	\$33,913.33	\$33,990.75	\$33,999.06	\$34,062.42
Base Rent \$/RSF		\$25.01	\$25.01	\$28.27	\$28.27	\$28.27	\$28.27
Other \$/RSF		\$0.92	\$0.96	\$0.99	\$1.06	\$1.06	\$1.12

Additional Payments:

Base Date	Cap Percentage	Link Percentage	Rent Charge Type
0	0	0	0

Buttons: CAPS NUM INS 7/25/00 12:34 PM

## Financial Information

You can view financial information about annual rent, services costs and escalations by clicking on the **Financial Information** section of the **Property Summary** menu. Data is displayed in a grid for easy use and validity checks have been incorporated to ensure consistency. The user can also define their own cost categories. In addition, you can initially input projected data and, over time, enter actual information as well as revise previous estimates. This can be used as a very valuable budgeting tool.

Unlike the other screens in LeaseMan, the **Financial Information** data screen represents what will print out on the Summary Report in the **Financial** Section. The data that generates these totals can be accessed either by double-clicking in the Grid-Type display or by selecting **View**, then **Financials** located on the Menu Bar.

To work with **Financials**, click on the **Financial** section of the **Property Summary** Menu and a grid will be displayed of the existing calculations. To edit there, click on the **edit** button, then click on the **Payment Details** button.

LeaseMan allows you to provide the minimum input for this information which yields the greatest results. For example, if you only had one record for Base Rent in this data grid, then LeaseMan would carry this out until the end of the lease. If you have a "bump" in the rent, simply enter that and, unless you have another base rent record in this table, that entry would be carried out for the remainder of the lease.

LeaseMan - C:\LEASEMAN\SAMPLE\SAMPLE.MDB - [Miscellaneous]

RecordID: 00001A

LL Contribution: 254787.5	Right to Sublet: Y-w/LL Consent	Airport Dist: 5.6 Miles
Free Rent: 3 Months	Right to Assign: Y-w/LL Consent	Views: Pond
Security Deposit: 50000	Right of 1st Refusal: Y-w/LL Consent	Satellite Dish: Roof Access
Hold Over to: 10%	Right to Avail: 30 days notice	% Occupied: 100
Parking Spaces: 5 Reserved	Partition Clause: No	Phone System: Inter-Tel
Communications: Satellite	Restoration Req'd: Yes	Data Center: On Site
RE Broker: Cushgill & Sleepmountain	Tenant to Maintain: No	Negotiator: M. Albright
	LL to Maintain: All	Prior Year Revenue: \$6.8 Million

Buttons: CAPS NUM INS 7/25/00 12:31 PM

## Miscellaneous Data

As the name might indicate, this section is where you can input other aspects of the property. The labels in the **Miscellaneous** section can be set up by user-defined data models or modified on a lease-by-lease basis.

## Usage

LeaseMan allows you to track information regarding a property's usage in the event that the same site serves multiple purposes. For example, the site may have numerous buildings on it with one being a warehouse, another being office space, and a third being manufacturing. Use the usage data screen to keep track of these buildings, as well as the SF/person ratios for each, or even space allocations co-locating entities.

LeaseMan - C:\LEASEMAN\SAMPLE\SAMPLE.MDB - [Space Utilization Information]

RecordID: 00001A

Space Utilization

Use	Area	Percent of total	Occupants	Area/Occupant	Ceiling Height	Comments
Administration	3,250	%23.37	19	181	8'	
R&D	3,858	%27.74	10	386	10'	
Sales	6,800	%48.89	42	162	8'	

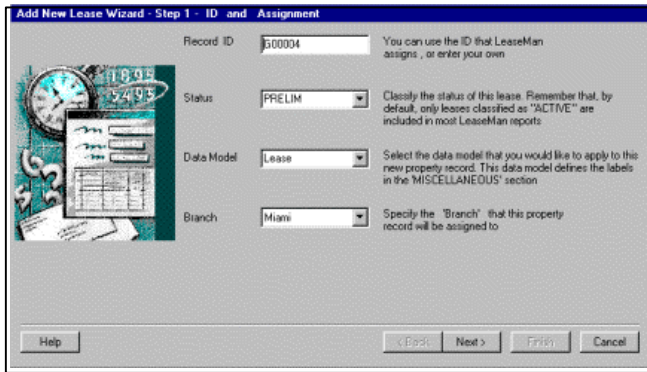
Buttons: CAPS NUM INS 7/25/00 12:35 PM

## Comments

You can record any comments for a given property in any of the three comment sections provided in LeaseMan. You can also modify each of the three column headers on a lease-by-lease basis.

## Approvals

LeaseMan provides several fields where approvals for the record can be noted and/or tracked. We suggest that as a property whose status is designated "Preliminary" gets signed, the names would then be entered into the appropriate fields as would the dates for each signature.

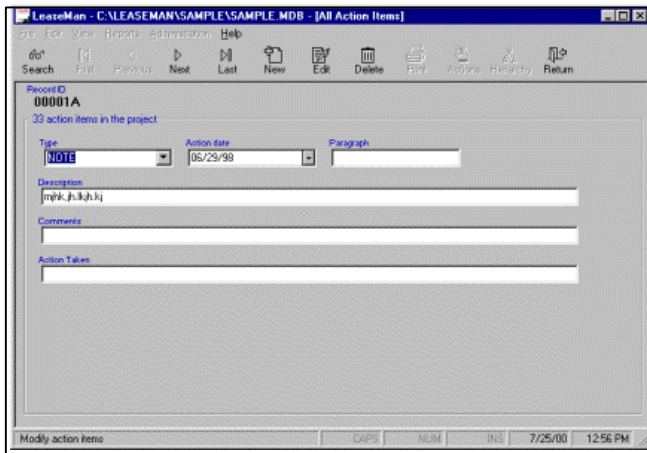


## Adding a New Lease

LeaseMan allows you to enter a lease through our **New Lease Wizard** which you can run by clicking on the **New** button on the toolbar when you are on the Lease Summary Screen.

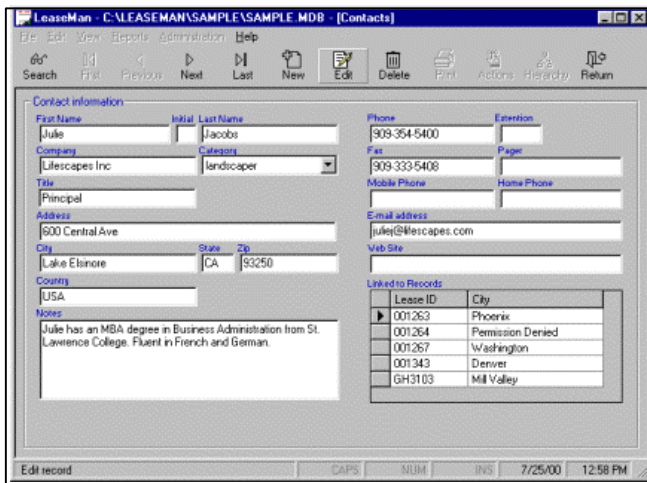
## Action Items

Action Items allow you to track other tasks related to records. These could include reminders to contact a branch manager about an option date, or to collect insurance certificates. You can also enter a paragraph reference to a legal document as well as enter some comments about any action taken. This can be accomplished by right clicking on the property record in the tree view and selecting **Action Items**.



## Attaching Documents

It is possible to attach a document created by a Windows-Registered application to a lease using LeaseMan, making it that much easier to track all data pertinent to a lease. To do this, right click on the property you are working with in the tree view. A menu will appear with a browser where you can select the file from the folders given. When you have done this select the **Documents** tab from the **Reference Tabs** at the bottom of the screen. This tab tells you the number of documents attached, the file name, and allows you to make notes about the document as well as list the document type.

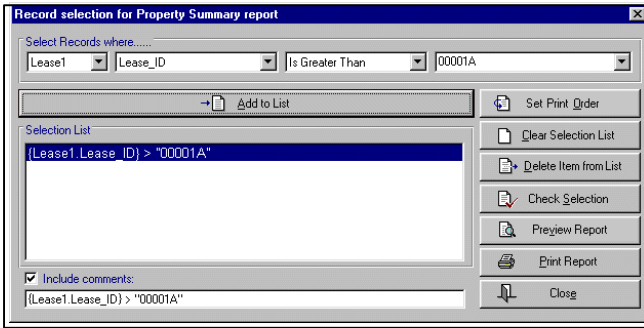


## Working With Contacts

It is important to keep track of all contacts associated with a lease, from real estate agents to plumbers. This couldn't be easier with LeaseMan. Select **View > All Contacts**. A dialogue box will appear giving you the opportunity to fill in all information regarding a contact. Select the **New** button to create a new contact and the **Edit** button to change information regarding a contact. You can also "attach" contacts to leases by right-clicking on a property record and choosing **Assign Contacts**. The **Reference Tabs** will reflect the number of contacts associated with a lease, and upon selecting the **Contacts** tab you will see all contacts assigned to a lease listed

## Logging Notes

LeaseMan allows you to log notes associated with a property record by going to **View > Log File**. Press the **New** button, select the contact, and enter the note. The date is automatically entered. When finished, press **Save** and then **Return**. The log notes can also be modified by clicking on the **Edit** button. The **Log Notes** tab will give you all notes logged to a lease.

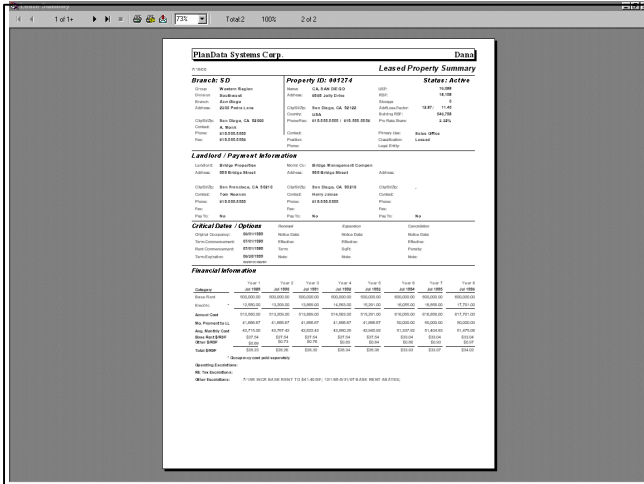


## Printing Property Summaries & Reports

At any point in this process, you can print a property summary by clicking on the **Print** icon on the toolbar. A list box will prompt you to select the type of record you want to print. To view the summary before printing, click on the **Preview Summary** icon, located on the right side of the screen.

Other Reports are available in LeaseMan, such as:

- ✍ **Financial** – these give you information on lease commitment, schedules, Annual Rent Obligation, or Annual Cash Flow.
- ✍ **Date Related** – focuses on either action items or critical lease dates.
- ✍ **Property Listings** – by expiration, city and state, hierarchy, or security deposit.
- ✍ **Miscellaneous** – gives you reports dealing with contacts, log notes, or hierarchy
- ✍ **Ad-Hoc Reports** – allows you to choose the type of report printed out.

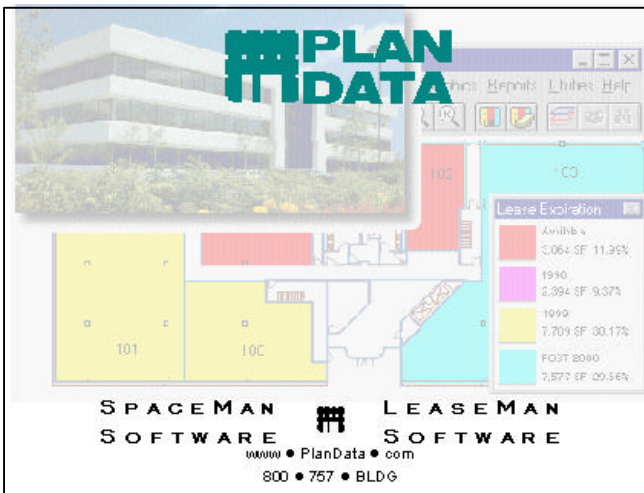


## Thank you for considering LeaseMan

Once you have evaluated LeaseMan, we are confident that you will have found this product to meet your lease tracking needs in a cost effective way. We think you'll agree that the simple graphical interface coupled with well-formatted reports and tools to track other important lease information is the most cost effective tool for tracking critical lease dates on the market today. You can turn this demonstration version of LeaseMan into a fully functional version by contacting PlanData at:

### PlanData Systems Corp.

11 Stewart Avenue/Suite 200  
 Huntington, NY 11743  
 Phone: 631 - 427 - 9300  
 Fax: 631 - 427 - 9490  
 Website: [www.PlanData.com](http://www.PlanData.com)



Our trained staff is ready to assist you with the setup, provide tips on importing current database information as well as provide you with the technical support you may need. Thank you for considering LeaseMan as your tool for avoiding the pitfalls of missed lease dates.