

WORX4U ARCHIBUS IMPLEMENTATION:

LEASE-IN: RENEW LEASE

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REPUBLIC OF SOUTH AFRICA



WORX4U



DOCUMENT CONTROL SHEET

Revision no.	Author	Date of Preparation (DD/MM/YYYY)
1.0	Mpho Nhuvunga	10/07/2019

CLIENT DISTRIBUTION AND COMMUNICATION

Name	Organisation	Date of Issue (DD/MM/YYYY)
	NDPW	
	NDPW	
	NDPW	
	NDPW	
	NDPW	

APPROVAL & SIGN OFF

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1. INTRODUCTION

This user guide provides details about how to Renew a Lease. The users will select a specific Lease to be **renewed**. The system will open the lease information of the lease to be **renewed**. Lease Code is selected, the General Lease Information will be displayed. The user selects the **Renew lease** option, fill in mandatory fields and send the code for Approval.

2. SCOPE

3. SCOPE

3.1 PURPOSE

This training manual is intended for the National Department of Public Works: Property Management Trading Entity

The purpose of this document is to provide details about how to:

- Renew a Lease

3.2 APPLICABILITY

This Training Manual covers ARCHIBUS v21.3 and subsequent versions unless this document is superseded by a later revision. The document is applicable to:

- Web Central v21.3

4. CONNECT TO ARCHIBUS

Using the Web Central application is the easiest way to access ARCHIBUS.

To access the data, only a web browser (Internet Explorer, Google Chrome or Mozilla Firefox) and a URL (Internet address) is required

1. URL: e.g. <https://worx4uarch-uat.pmt.e.org.za/archibus/login.axvw> - this URL is for exercise purposes

Note: The browser cache (history) must be deleted to view the updated ARCHIBUS functions.

2. Enter your username and password.



Figure 1: Sign in Window

Once all login information has been typed,

3. Click **Sign In**.

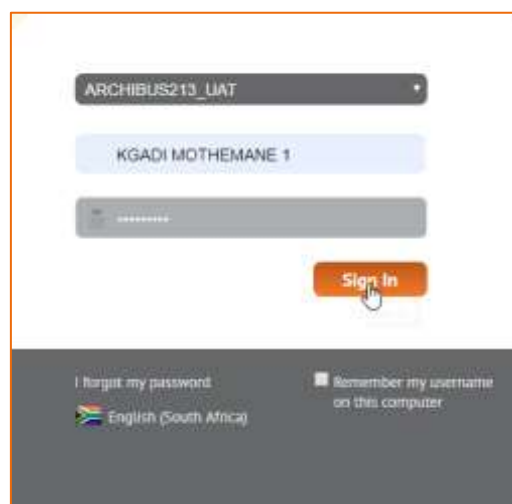


Figure 2: Sign – In

4. The following screen – landing page – will be displayed:

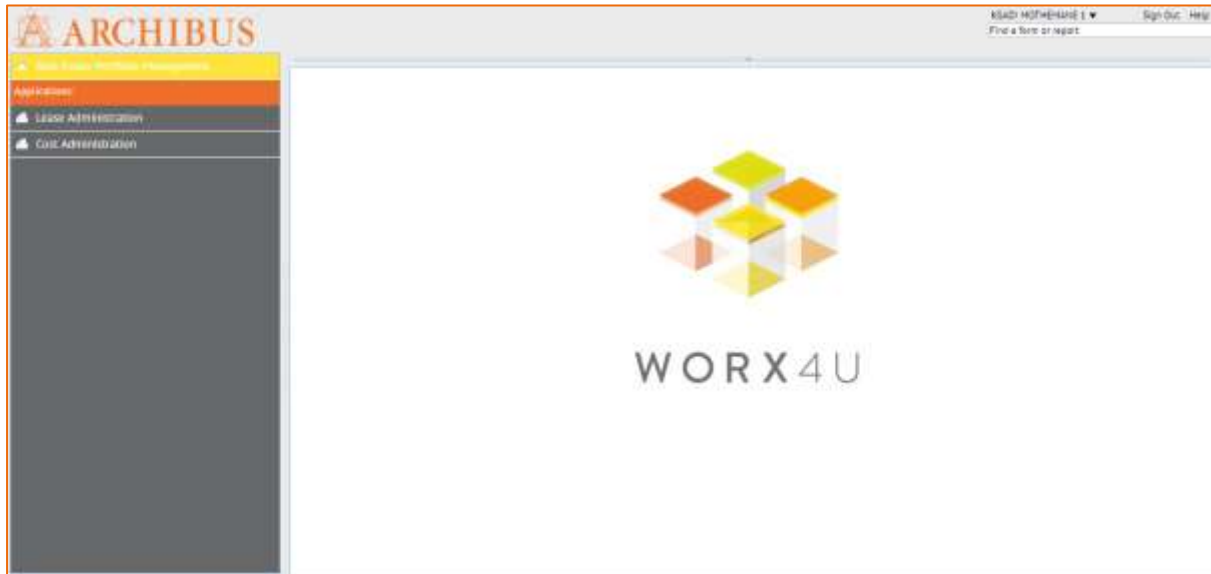


Figure 3: Landing Page

General Rules:

- *This function can only be performed by the capturer.*
- *A field with a red Asterix (*) means the field is a mandatory field*
- *Document highlighted in red means they are mandatory documents to be uploaded and once its uploaded it will turn green.*
- *By selecting Save it means that you are saving all the information you have captured, and the lease will be sitting with the capturer on a saved status.*
- *Route for verification means that you are sending the lease for verification.*

5. RENEW LEASE

To access the Lease Portfolio Console,

1. Select **Lease Administration | Capture Lease | Lease Portfolio Console**

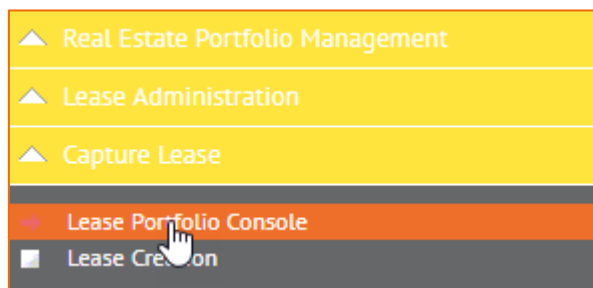


Figure 4: Process Navigator

2. In the Lease Portfolio Console, the users will select a specific Lease to be renewed or utilize the filter options. The Filter console enables you to search by such criteria as landlord, location, or by a specific Lease Code. The More button expands the filter to include additional fields. Complete the fields in the filter console to make your selections and then click Filter. The Lease Portfolio Console will list leases meeting your criteria.

Lease Code	Description	Region/Office	Property File Reference	PID Code	Landlord Code	Landlord Name	Tenant Code	Tenant Name
12969401	land test	NEL	1234/5584/234		2P40000001024	Viectors - Ltd	P4800000	Site
12969402	land test	NEL	1234/5584/234		2P40000000679	Amber Electronic Contractors	P4800004	Defence
12969403	Option 2 test	NEL	1100/1100/010		2P40000003413	SA Victoria Embankment Co	P4800003	Human Settlements
12969404	EDE	NEL	9000/0000/007		2P40000005490	akheriya security services s	P4800005	South African Police S
12969405	IMPERIAL BUILDING		7432/8525/965		2P40000006793	Joe davis locksmith & hardware	P4800008	South African Police S
12969406	IMPERIAL BUILDING		8126/6996/213		2P40000006794	Black Court	P4800009	South African Police S
12969407	IMPERIAL BUILDING		5800/0024/366		2P40000006795	Hi-Tech Security	P4800010	South African Police S
12969408	IMPERIAL BUILDING		265/556		2P40000006796	Phiso sen veki venter/ce	P4800011	South African Police S
12969409	one	NEL			14P40000002783	SILBLACKHATH INVESTMENTS (PTY	2P40000000743	Vicarsom S
12969410	TESTIN	NEL	1010/1010/001		2P40000000298	Sog Technologies Co	P4800048	Energy
12969411	Accommod pri n test 5	NEL	1236/4981/599		2P40000000607	D & H Building Trust	P4800012	Social Development
12969412	Option 2 test	NEL	1100/1100/010		2P40000003413	SA Victoria Embankment Co	P4800003	Human Settlements
12969413	WorkFlow testing 1	NEL	1100/1100/010		2P40000000445	3421 To B Project 24	P4800017	Small Business Develo

Figure 5: Lease Portfolio Console

3. In the **lease field** type in the Lease that needs to be Renewed, and then select the **filter option**



Figure 6: Expandable Filter

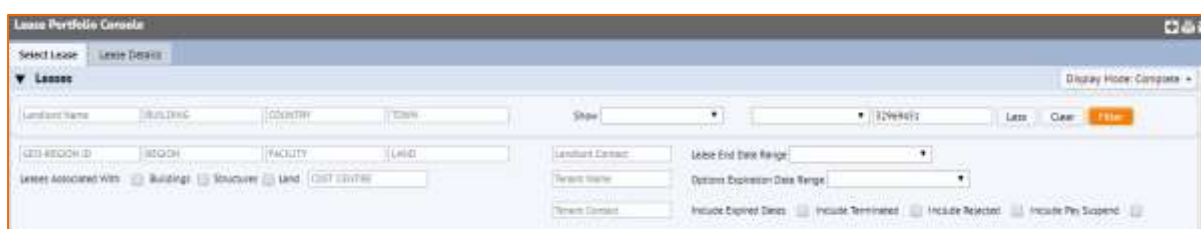


Figure 7: Expandable Filter

4. Once selected, the system will open the lease information of the lease to be **renewed**

The screenshot shows the 'Lease Portfolio Console' with the 'Leases' tab selected. Below the search filters, there is a table of leases. A red arrow points to the 'Lease Code' column header in the table.

Lease Code	Description	Regional Office	Property File Reference	PRIC Code	Landlord Code	Landlord Name	Tenant Code	Tenant Name	Asset Code	Land Code
329445	land test	NEL	1234/244/254		2P00000031634	Tenants - Ltd	#U80020	SRA	12945	P0004071

Figure 8: Expanded Filter

5. Once the Lease Code is selected, the General Lease Information will be displayed. The user checks if the information displayed is correct. The user then selects the **Renew lease** option, the system requires a confirmation from the user to proceed with the Lease renewal.

The screenshot shows the 'General Lease Information' form for Lease Code 329445. The form contains various fields for lease details. A red arrow points to the 'Renew Lease' button in the top right corner.

Figure 9: General Lease Information

6. The system will require confirmation to proceed with Renewal of the lease. Confirm by clicking on **Yes**

The screenshot shows a 'Confirm' dialog box with a question mark icon. The text inside says 'This will Renew the Lease! Are you sure?'. There are two buttons: 'Yes' and 'No'. A mouse cursor is pointing at the 'Yes' button.

Figure 10: Confirmation Option

7. To proceed with the renewal, complete all the mandatory field requirements as per new lease contract and then selects **Save** option

The screenshot shows the 'Edit Lease' form. It contains multiple sections for entering lease details, including Lease Code, Description, Landlord Code, Tenant Code, Dates, and various checkboxes and dropdowns. The 'Save' button is visible in the top right corner.

Figure 11: Edit Lease

NOTE: NOTE: The minimum requirements (mandatory fields) for adding a new lease are as follows:

- Description
- Landlord Code
- End date of the lease
- Start date of the lease
- Occupation Date
- Lease Signed Date
- Landlord/Tenant code
- Area Rentable (M²)
- BID Committee Approval Date
- Notice Period in Months
- Current Use

8. In order to Renew the lease, the user need to **Add recurring costs** and **Upload Documents** then selects the **Route for verification** option

The screenshot shows the 'Lease Portfolio Console' interface. The 'Lease Details' tab is active. Under 'General Lease Information', the 'Lease Status' is set to 'Not Yet Assigned'. The 'Route for Verification' option is highlighted in the 'Lease Status' dropdown menu.

Figure 12: Route for Verification Option

The screenshot shows the 'Options' section of the Lease Portfolio Console. It includes sections for 'Amendments', 'Communication Log Items', 'Available Suites - Not Yet Assigned', 'Suites Assigned to the Selected Lease/Sublease', and 'Suites Assigned to Other Leases/Subleases'. Each section has an 'Add New' button and a 'No records to display' message.

Figure 13: Options

The screenshot shows the 'Documents' section of the Lease Portfolio Console. It displays a table with columns for 'Document Type', 'Classification', 'Document Name', 'Document', and 'Description'. The table lists various documents such as 'Lease Document', 'Renewal Letter from Client Department', 'Needs Assessment from Client Department', 'Verified PA12.1 Document', 'Occupation Certificate', and 'Municipal Value Certificate'. The 'Verified PA12.1 Document' and 'Occupation Certificate' rows are highlighted in red.

Figure 14: Documents

Note: Mandatory Documents to be uploaded are as follows:

- PI/Investment Decision from REIM
- Verified PA12.1 Document
- Certified/Original Lease Agreement

Assigning Contacts to a Lease

Use the **Contacts** tab to assign existing contacts to a lease and to add new contacts if needed. These contacts are stored in the Contacts table. Adding contacts in this way enables the user to add the most complete contact information and to add this same contact record to multiple leases if applicable.

The **Contact Type** designates the role the contact has for this lease. The user can add a Landlord and a Tenant Contact as well as other types of secondary contacts, such as Building Supervisor, Property Manager etc.

1. To assign a Contact for the lease, click **Assign Landlord / Assign Tenant**



Figure 15: Contacts

2. Click on the **Add New** button

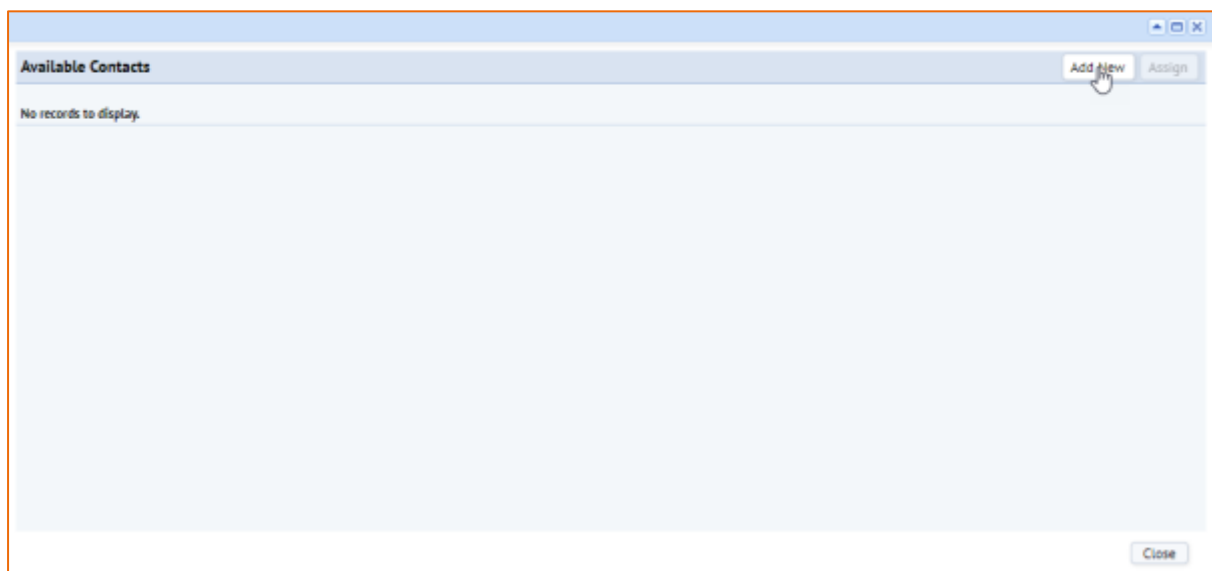


Figure 16: Add New

3. A **Contact Details** view will open where the information of the new contact can be captured. Once all the contact information has been captured, click **Save**.

A screenshot of the 'Contact Details' form. The form is titled 'Contact Details' and contains several input fields and dropdown menus. The fields are organized into three columns. The first column contains 'Contact Code', 'First Name' (with value 'Indiwe'), 'Address 2' (with value 'house 31'), 'Country Code' (with value 'ZAF'), and 'Email Address' (with value 'indiwe.zitha@dpw.gov.za'). The second column contains 'BP ID' (with value 'ZPW0000011624'), 'Last Name' (with value 'Zitha'), 'City' (with value 'BUSHBUCKRIDGE RURAL'), 'Telephone Number' (with value '01356894561'), and 'Fax Number' (with value '0135984521'). The third column contains 'Honorable' (with value 'Mr'), 'Address 1' (with value 'prominence street'), 'Region Code' (with value 'NEL'), 'Cellular Number' (with value '0845698521'), and 'Contact Status' (with value 'CURRENT'). At the bottom right, there are two buttons: 'Close' and 'Save'. A mouse cursor is pointing at the 'Save' button.

Figure 17: Contact Details

- When the contact has been saved it reflects in the **Available Contacts** list and can then be assigned to the lease by clicking the checkbox next to the contact record & then clicking the **Assign** button.



Figure 18: Available Contacts

- The contact will be on the list of contacts for the lease once it been assigned.



Figure 19: Contacts

- To unassign a contact, click in the checkbox then click unassign



Figure 20: Contacts

- Confirm by clicking **Yes**.

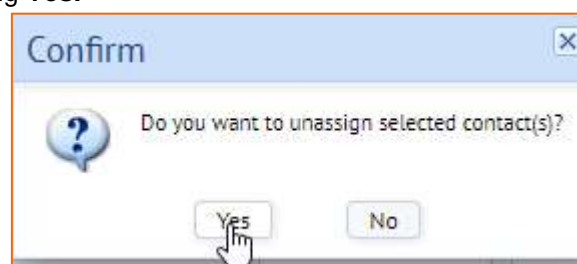


Figure 21: Unassign Confirmation

- The contact will be removed from the list

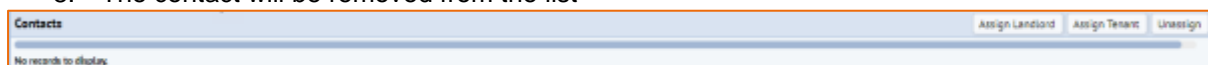


Figure 22: Unassigned

Add Recurring Costs

A regularly occurring cost or estimated cost which is documented with one record - a **Recurring Cost record** - that describes the income or expense and its pattern (how often it occurs, the rate at which it increases or decreases, the time period during which the cost applies, and so forth).

Example: If you pay a monthly rent you can develop one Recurring Cost record that describes the expense, the date of the month it is due and the time period during which the monthly rent is due.

Recurring costs provide a means of quickly modeling there expenses and income. You can use recurring cost information to analyze cost history and cash flow; however, you cannot charge back recurring costs.

If you develop recurring costs and then find that you prefer to track individual expenses (rather than the summary expenses documented by recurring costs), you can generate individual Scheduled Cost records from your Recurring Cost records.

1. To capture information for a new recurring cost, click **Add New in the Recurring Costs panel**

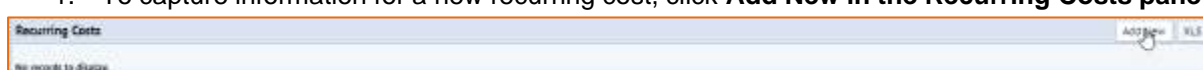


Figure 23: Recurring Costs

2. Complete all the relevant information in the Add Recurring Cost view displayed. Once the information has been captured click **save**.

Note: The system calculates the cost amount by using the Number of Units and the Rate per Unit. The status of the cost record, it's currently set to NO because it has not been approved. The percentage will be different according to the document used to capture the asset.

 A screenshot of the 'Add Recurring Cost' form. The form is titled 'Add Recurring Cost' and has a toolbar with 'Save', 'Delete', and 'Cancel' buttons. A callout box with the text 'Click save once done capturing' and an arrow points to the 'Save' button. The form contains several input fields:

- Recurring Cost Code: (empty)
- Country Code: ZAF
- Cost Category*: BASE RENT
- Number of Units*: 100
- Rate per Unit*: 250
- Amount Expense - Base (Payment): 25000
- Amount Expense - VAT (Payment): 3,500.00
- Amount Expense - Total (Payment): 28,500.00
- Custom Period (Days): 0
- Date Trans. Created: 2019/07/12
- ☒ Cost Dates Match Lease?
- Start Date*: 2021/09/01
- Description: (empty text area)
- Currency (Payment): South African Rand
- VAT Percent: 14.00
- Unit Type*: Square Meter
- Payment Frequency*: MONTH
- Escalation Percentage*: 14
- Active?: NO
- End Date*: 2021/12/31
- Override VAT Percent? (checkbox)
- Override VAT Amount? (checkbox)
- Override Exchange Rate? (checkbox)

Figure 24: Add Recurring Cost

- | Recurring Costs | | | | | | | | | | Add New | XLS |
|---------------------|---------------|------------------------------|-----------------------------|------------------------------|-------------------------------|------------------------------|-------------------------------|------------------|--------------|----------|-----|
| Recurring Cost Code | Cost Category | Amount Income - Base Payment | Amount Income - VAT Payment | Amount Income - Base Payment | Amount Expense - Base Payment | Amount Expense - VAT Payment | Amount Expense - Base Payment | Currency Payment | Country Code | VAT Rate | |
| 6775L | BASE RENT | 80.00 | 00.00 | 80.00 | 825,000.00 | 85,500.00 | 828,500.00 | ZAR | ZAF | | |

- | Recurring Costs | | | | | | | | | | Add New | XLS |
|---------------------|---------------|--------------------------------|-------------------------------|-------------------------------|---------------------------------|--------------------------------|----------------------------------|--------------------|-------------|---------|-----|
| Recurring Cost Code | Cost Category | Amount Income - Rent (Payment) | Amount Income - VAT (Payment) | Amount Income - Tax (Payment) | Amount Expense - Rent (Payment) | Amount Expense - VAT (Payment) | Amount Expense - Total (Payment) | Currency (Payment) | Quoted Code | 1st Per | |
| 4714 | BASE RENT | 0.00 | 0.00 | 0.00 | 20,000.00 | 0.00 | 20,000.00 | 2nd | DAF | | |

6. To delete the recurring cost record, click Delete in the **Edit Recurring Cost** view.

Figure 28: Delete Recurring Cost

7. A screen will display prompting the user to confirm that the recurring cost record should be deleted. To confirm, click **OK**.

Figure 29: Delete Record confirm

Note: For leases where the Department is the Landlord the user will only be able to add income costs and for leases where the Department is the Tenant the user will be able to add expense costs.

Clauses

Use the Clauses tab to add clauses to lease agreements that detail responsibilities for either tenants or landlords.

If a responsibility is split between tenant and landlord, create two clause records with the relevant responsible party assigned to the record.

1. Click **Add New** to add a new clause to the lease.

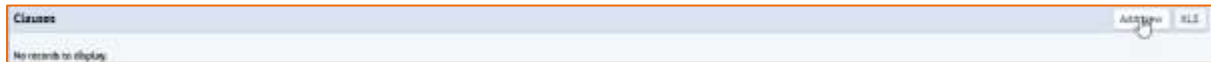


Figure 30: Clauses

2. The Add Clause view will open requiring information such as the Clause Code, Clause Type Code, Responsible Party, etc. to be added.

Figure 31: Add Clause

3. Once all the clause information has been captured, click **Save**

Figure 32: Add Clause – Save

4. The lease will be updated with the new clause.



Clause ID	LANDLORD
CLAUSE 2.1	LANDLORD

Figure 33: Clauses

Note: Once the clauses have been saved the upload document field will be enabled, allowing the user to upload a document and attach it to the clauses. By saving the clause, a document type and name will also be created under the documents field where the document can be uploaded at a later stage.

Options

Use the Options tab to add information for lease options. These are legal time-sensitive options that can be exercised on a lease such as the right of first refusal to buy the property or the right to rent space that becomes vacant. The user can then receive alerts from the console when these options are about to expire.

1. Click **Add New** to capture the lease option.

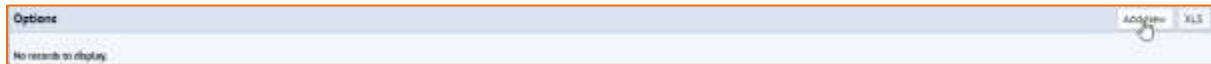


Figure 34: Options

2. An **Add Option** view will open requiring information input for the option to be added.

Figure 35: Add Option

3. Once all the information has been captured, click **Save**.

Add Option

Option Code* RENEWAL 2.0

Description* option to renew

Option Type N/A

Who can Exercise? BOTH

Date Exercised

Exercised By

Date Exercising Applicable

Comments

Date Issued 2019/07/12

Option Dates Match Lease? Yes

Date Option Available 2021/09/01

Date Option Expires 2021/12/31

Document Upload a document

Date to Review

Click Save Save Delete

Close

Figure 36: Option

4. The lease will be updated with the new **Option**.

Option Code	Description	Document	Option Type	Who can Exercise?	Exercised By	Date Exercised	Date Exercising Applicable	Date Option Available	Date Option Expires	Date to Review	Comments
RENEWAL 2.0	option to renew	VERIFIED PULL LOCK	N/A	BOTH				2019/07/12	2021/12/31		

Figure 37: Options

Note: Once the option has been saved the upload document field will be enabled, allowing the user to upload a document and attach it to the option. By saving an option, a document type and name will also be created under the documents field where the document can be uploaded at a later stage.

Amendments

The user can record amendments to track changes to the lease agreement. You can also attach the relevant documents confirming the changes for the amendment.

1. To record the amendment, click **Add New**.

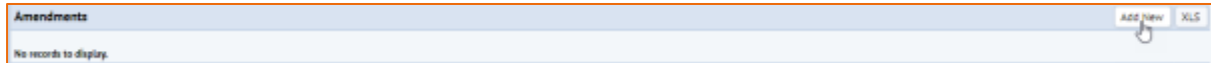


Figure 38: Amendments

2. The **Add Amendment** view will open for the user to capture the details of the amendment.

A screenshot of the 'Add Amendment' form in a web application. The form has a light blue header with the title 'Add Amendment' and 'Save' and 'Delete' buttons. The form fields are arranged in two columns. The left column contains 'Lease Amendment ID' (a text input), 'Description*' (a text input), 'Document' (a button labeled 'Upload a document'), and 'Comments' (a large text area). The right column contains 'Date Requested' (a date input), 'Date Effective' (a date input), and 'Exercised By' (a text input). At the bottom right of the form is a 'Close' button.

Figure 39: Add Amendment

3. Once all the information has been captured, click **Save**.

Add Amendment

Lease Amendment ID 11

Description* Lease Agreement Amendment

Date Requested 2021/08/12

Date Effective 2021/08/24

Document Upload a document

Exercised By

Comments

Click Save Save Delete

Close

Figure 40: Add Amendment

4. The lease will be updated with the amendment record.

Lease Amendment ID	Description	Date Requested	Date Effective	Exercised By	Document	Comments
11	Lease Agreement Amendment	2021/08/12	2021/08/24			

Figure 41: Amendment

Communication Log items

The **Communication Log** records written correspondence and verbal communication about the lease. Use them to enter notes about conversations, phone calls, e-mail, etc. For written correspondence, the user can create a communication log summarizing a letter or fax, scan the document and store it in the Document field for the log.

1. To record correspondence, click **Add New**.

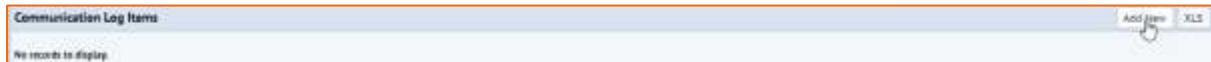


Figure 42: Communication Log Items

2. The **Add Communication Log** view will open to capture the details of the correspondence.

The screenshot displays the 'Add Communication Log' form. At the top, there are tabs for 'Add Log' and 'Edit Details'. The form contains the following fields and values:

- Comm. Log Code*:
- Lease Code*: 32969502
- Date of Comm.: 2019/07/12
- Time of Comm.: 9:43 (with a dropdown showing 9:43 AM)
- Contact Code:
- Action Item ID:
- Recorded By: KGADI MOTHEMANE 1

Buttons for 'Save and Next' and 'Close' are located at the top right and bottom right of the form, respectively.

Figure 43: Add Communication Log

- Once all the information has been captured, click **Save and Next**.

Add Log **Edit Details**

Add Communication Log

Comm. Log Code:* MEETING MINUTES

Lease Code* 32969502

Date of Comm. 2019/07/12

Time of Comm. 9:43 9:43 AM

Contact Code

Action Item ID

Recorded By KGADI MOTHEMANE 1

Click Save and Next Save and Next

Close

Figure 44: Add Log

- Enter the rest of the information in the **Edit Communication Log Details** view, upload any communication documents such as emails, faxes or minutes then click **Save**.

Add Log **Edit Details**

Edit Communications Log Details

Comm. Log Code:* MEETING MINUTES

Lease Code* 32969502

Date of Comm. 2019/07/12

Time of Comm. 9:43 9:43 AM

Communication Type

Contact Code

Priority Average

Recorded By KGADI MOTHEMANE 1

Action Item ID

Project Code

Document Upload a document

Summary

Description

Click Save Save Delete

Close

Figure 45: Edit Communication Log Details

- The lease will be updated with the Communication Log Item record.

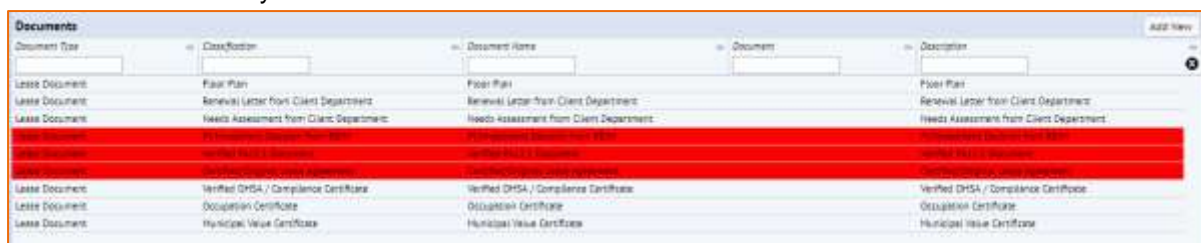
Date of Comm.	Time of Comm.	Comm. Log Code	Contact Code	Priority	Lease Code	Action Item ID	Document	Description
2019/07/12	9:43 AM	MEETING MINUTES		Average	32969502			

Figure 46: Communication Log Items

Documents

Use the **Documents** tab to select documents to associate with the selected lease, to edit, update or delete an existing document.

1. The user can add, edit, delete or view documents. When adding documents, they will be available to all authorized users. The information entered for documents is included in the **Documents by Lease Report** generated from the Portfolio Management application and the **Lease Details Reports** available from Lease Administration. The red highlighted documents are mandatory documents.



Document Type	Classification	Document Name	Document	Description
Lease Document	Floor Plan	Floor Plan		Floor Plan
Lease Document	Renewal Letter from Client Department	Renewal Letter from Client Department		Renewal Letter from Client Department
Lease Document	Needs Assessment from Client Department	Needs Assessment from Client Department		Needs Assessment from Client Department
Lease Document	PI/Investment Decision from REIM	PI/Investment Decision from REIM		PI/Investment Decision from REIM
Lease Document	Verified HSA / Compliance Certificate	Verified HSA / Compliance Certificate		Verified HSA / Compliance Certificate
Lease Document	Occupation Certificate	Occupation Certificate		Occupation Certificate
Lease Document	Municipal Value Certificate	Municipal Value Certificate		Municipal Value Certificate

Figure 47: Documents

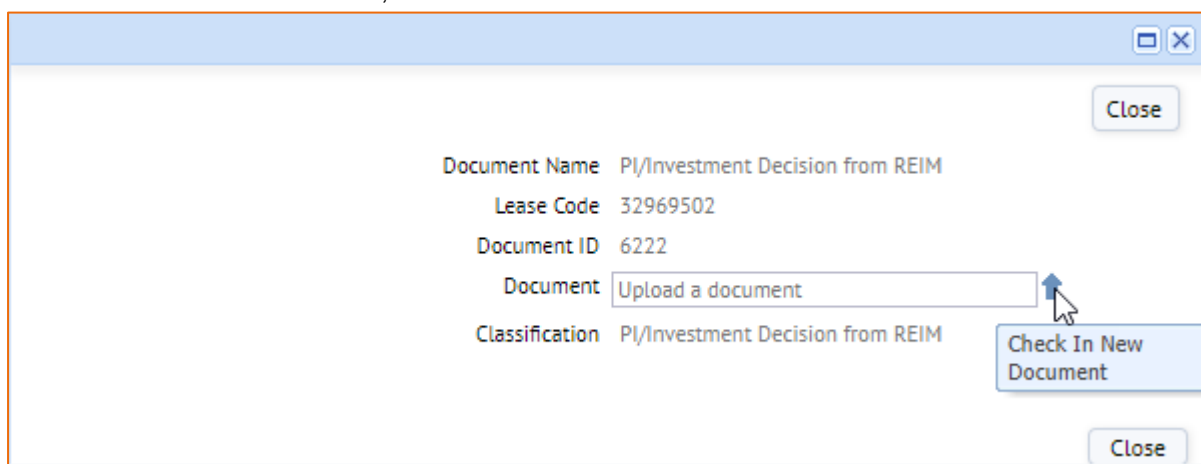
2. To upload **Documents** to the document records already prepopulated click on the **Document Name**.



Document Type	Classification	Document Name	Document	Description
Lease Document	Floor Plan	Floor Plan		Floor Plan
Lease Document	Renewal Letter from Client Department	Renewal Letter from Client Department		Renewal Letter from Client Department
Lease Document	Needs Assessment from Client Department	Needs Assessment from Client Department		Needs Assessment from Client Department
Lease Document	PI/Investment Decision from REIM	PI/Investment Decision from REIM		PI/Investment Decision from REIM
Lease Document	Verified HSA / Compliance Certificate	Verified HSA / Compliance Certificate		Verified HSA / Compliance Certificate
Lease Document	Occupation Certificate	Occupation Certificate		Occupation Certificate
Lease Document	Municipal Value Certificate	Municipal Value Certificate		Municipal Value Certificate

Figure 48: Documents

3. To attach the document, click on the Check In New Document icon.



Document Name PI/Investment Decision from REIM

Lease Code 32969502

Document ID 6222

Document

Classification PI/Investment Decision from REIM

Check In New Document

Figure 49: Upload Document

- Click on **Choose File** to upload a file.

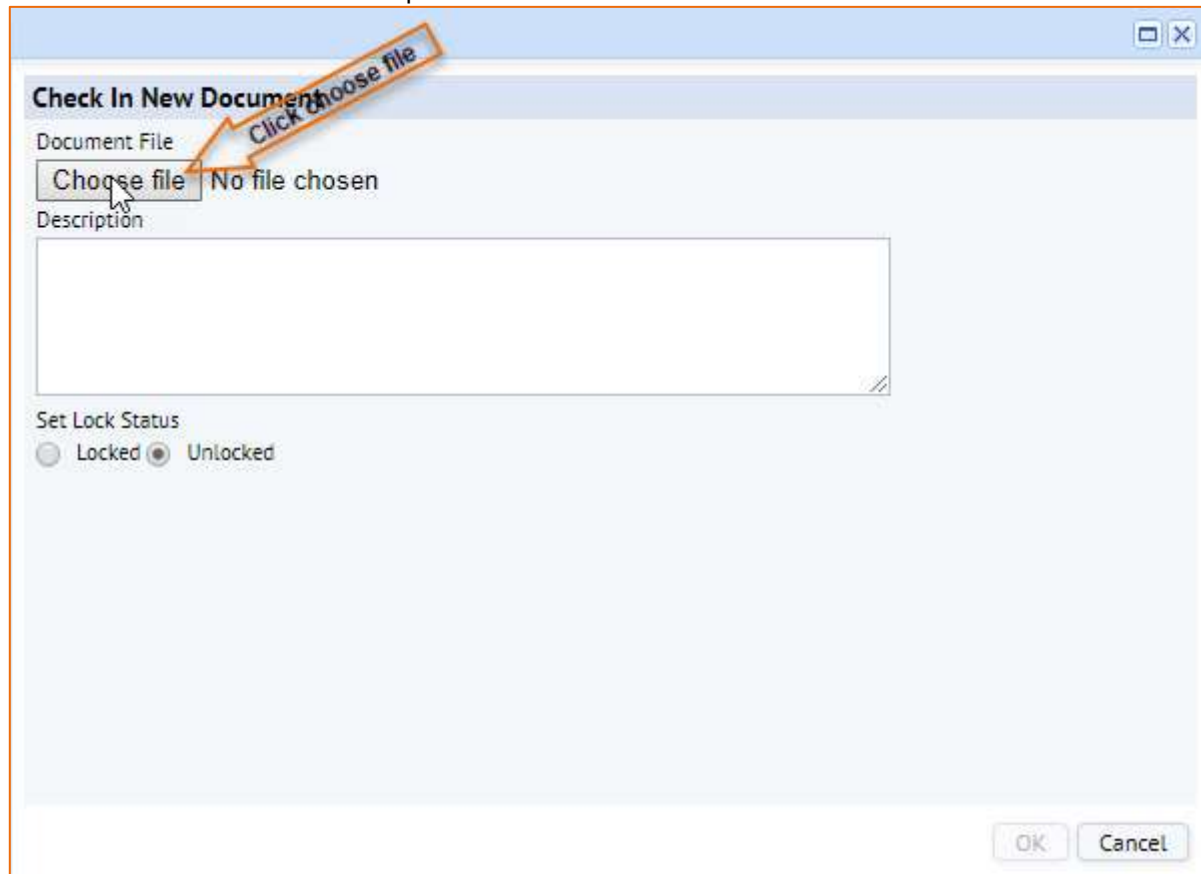


Figure 50: Choose File

- Choose a file from your computer.

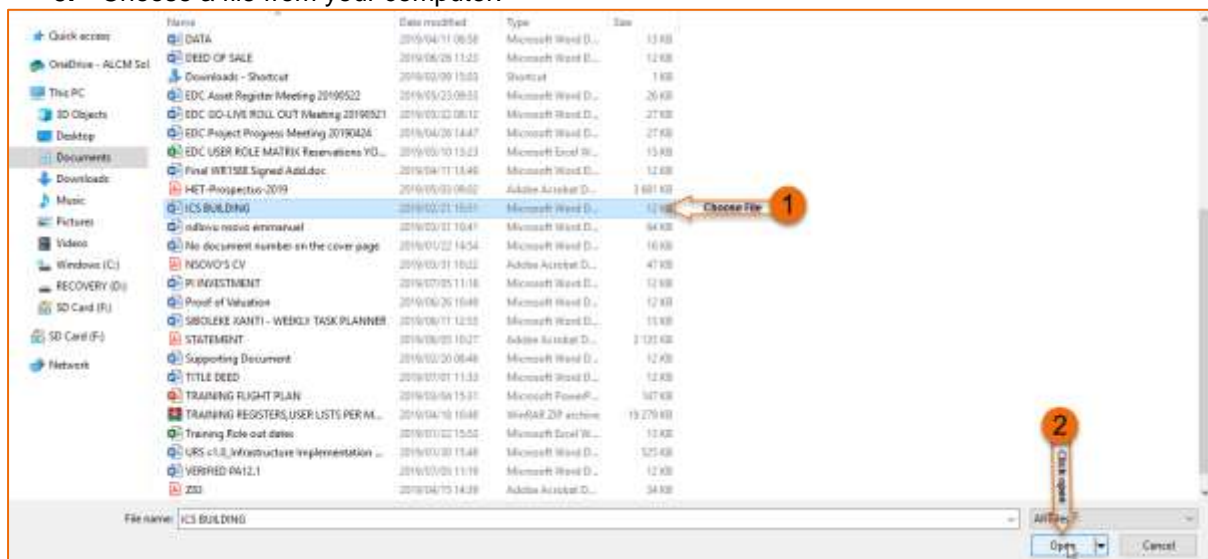


Figure 51: Choose File

- The system will take you back to the Check In New Document view with the name of the attached document displayed next to the **Choose File** button. Click OK to proceed

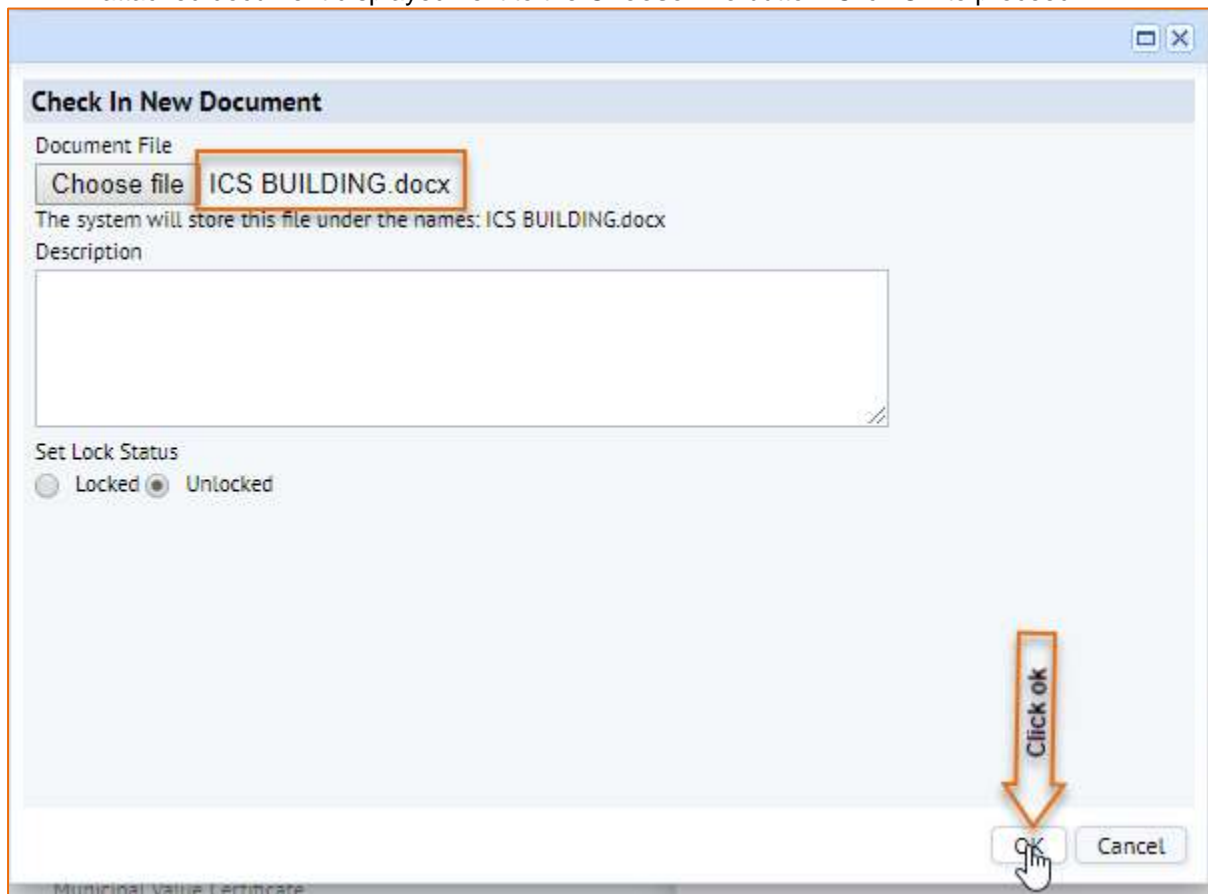


Figure 52: Ok Button

- Once the floor plan has been attached, click **Close**.

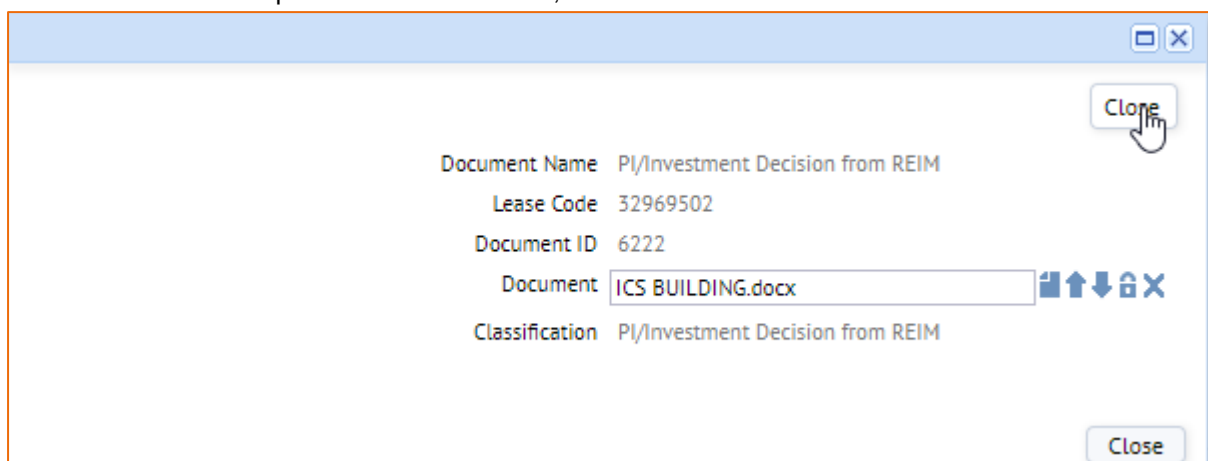


Figure 53: Document Uploaded

- | Documents | | | | | | Add New |
|----------------|--|--|--|--|--|---------|
| Document Type | CrossSection | Document Name | Document | Description | | |
| Lease Document | Floor Plan | Floor Plan | Floor Plan | Floor Plan | | |
| Lease Document | Renewal Letter from Client Department | Renewal Letter from Client Department | Renewal Letter from Client Department | Renewal Letter from Client Department | | |
| Lease Document | Health Assessment from Client Department | Health Assessment from Client Department | Health Assessment from Client Department | Health Assessment from Client Department | | |
| Lease Document | Health Assessment from Client Department | Health Assessment from Client Department | Health Assessment from Client Department | Health Assessment from Client Department | | |
| Lease Document | Health Assessment from Client Department | Health Assessment from Client Department | Health Assessment from Client Department | Health Assessment from Client Department | | |
| Lease Document | Health Assessment from Client Department | Health Assessment from Client Department | Health Assessment from Client Department | Health Assessment from Client Department | | |
| Lease Document | Verified OSHA / Compliance Certificate | Verified OSHA / Compliance Certificate | Verified OSHA / Compliance Certificate | Verified OSHA / Compliance Certificate | | |
| Lease Document | Occupation Certificate | Occupation Certificate | Occupation Certificate | Occupation Certificate | | |
| Lease Document | Municipal Value Certificate | Municipal Value Certificate | Municipal Value Certificate | Municipal Value Certificate | | |
| Lease Document | Investment Decision from BOD | Investment Decision from BOD | 100,000,000,000 | Investment Decision from BOD | | |

- | Documents | | | | | Add New |
|-----------------|---|---|------------------------------------|---|---------|
| Document Type | Classification | Document Name | Document | Description | |
| Lease Documents | Flux Plan | Flux Plan | | Flux Plan | |
| Lease Documents | Renewal Letter from Client Department | Renewal Letter from Client Department | | Renewal Letter from Client Department | |
| Lease Documents | Needs Assessment from Client Department | Needs Assessment from Client Department | | Needs Assessment from Client Department | |
| Lease Documents | Verified OHSA / Compliance Certificate | Verified OHSA / Compliance Certificate | | Verified OHSA / Compliance Certificate | |
| Lease Documents | Occupation Certificate | Occupation Certificate | | Occupation Certificate | |
| Lease Documents | Municipal Value Certificate | Municipal Value Certificate | | Municipal Value Certificate | |
| Lease Documents | Certified Original Lease Agreement | Certified Original Lease Agreement | CERTIFIED ORIGINAL LEASE AGREEMENT | Certified Original Lease Agreement | |
| Lease Documents | Eviction Notice from MPH | Eviction Notice from MPH | MPH NOTICE TO EVICT | Eviction Notice from MPH | |
| Lease Documents | Verified MPH 1 Document | Verified MPH 1 Document | MPH NOTICE TO EVICT | Verified MPH 1 Document | |

- Lease Portfolio Console**

Select Lease: **Lease Details**

General Lease Information

Lease Code	123456789	Free Lease?	No
Landside Code	20160000000000	Description	Unit 100
Landside Contact		Building Code	
Landside Name	100000 - 100	Date Start	2015/01/01
Date End	2015/12/31	Unit Code	10000000000000
Lease Status	NEWED	Lease Signed?	No
VAT Excluded?	No	Approval Comment	

Click Route for Verification → **Verify**

Tenant Info

Tenant Contact	
Tenant Name	Site
Occupation Date	2015/01/01
Area - Sq. Metres	210.00
Lease Type	Full
Verification Comment	

Contacts

Contact Code	BP 01	First Name	Unit Name	Email Address	Contract Number	City	Region Code	Country Code
35	20160000000000	100000	1000	100000000000000000	2016000000	BUSHBUCKROVE BURL	HEL	ZAR

Assign Landlord **Assign Tenant** **Unassign**

Recurring Costs

Recurring Cost Code	Cost Group	Amount Income - Base (Payment)	Amount Income - VAT (Payment)	Amount Expense - Base (Payment)	Amount Expense - VAT (Payment)	Amount Expense - Base (Payment)	Amount Expense - VAT (Payment)	Contract (Payment)	Country Code	VAT No
67115	BASE RENT	80.00	80.00	80.00	80.00	800.000.00	82.000.00	822.000.00	ZAR	DAT

Clauses

Clause Code	Clause Type Code	Description	Responsible Party	Contact Name	Clause Does Not Match Lease?	Date Start	Date End	Location in Document	Document

Assign New **XS**

- The system will display a change in Status once the transaction has been Routed For Verification

The screenshot displays the 'Lease Portfolio Console' interface. The 'Lease Details' tab is active, showing 'General Lease Information'. The 'Lease Status' dropdown menu is highlighted with a red box, showing the option 'SENT FOR VERIFICATION'. Other fields include Lease Code (5394952), Landlord Code (2990000051824), Tenant Code (FUB00103), and various dates and codes. The 'Contacts' section shows contact details for 'indrive.zima@capengzima'. The 'Recurring Costs' table lists costs like 'BASE RENT' with amounts in ZAR. The 'Clauses' section is at the bottom.

Recurring Cost Code	Cost Category	Amount Income - Base (Payment)	Amount Income - VAT (Payment)	Amount Expense - Base (Payment)	Amount Expense - VAT (Payment)	Amount Expense - Total (Payment)	Currency (Payment)	Country Code	VAT No
67316	BASE RENT	90.00	90.00	90.00	90.00	90.00	ZAR	ZAF	

Figure 58: Lease Status

You have now reached the end of the manual and the lease transaction will be awaiting verification.

THE END!