**Functional Requirements**

**IMPROVE .Net.**

**Commercial Sales Analysis Application**

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**Change Control Log**

| **Version** | **Date** | **Ticket** | **Change** | **Author** |
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# Sales Analysis Input Overview

Sales Analysis can be performed using CSA sales analysis application which can be accessed via Improve.Net. Users can perform sales analysis on a given sale using the CSA Commercial -Industrial Sales Analysis Input or Vacant Land Input Sales Analysis applications.

## User Objective

User should be able to perform sales analysis on Commercial-Industrial Improved and/or Vacant land property types. Sales Analysis can be done at any time on any Sale by completing the sales analysis worksheet available via CSA application.

This FR describes the functionality of Sales Analysis module of CSA application.

This FR explains two components of Sales Analysis module:

* Commercial-Industrial Sales Analysis Input
* Vacant Land Sales Analysis Input

## Key Stakeholders

Assessors

## User Story

### Scenarios

* If the property is owner occupied, enter 100 in the **% Owner Occupied** field in Sales Info tab. The **Income** and **Expenses** tabs are no longer needed and will be grayed out and un-selectable.
* A Benchmark Rating dropdown is available to rate the OAR and the other values derived from the CSA for future use as a comparable. The Benchmark Rating will also be reflected in the Sale Info Tab.
* Modify Reason is required if CSA is opened after it’s approved by supervisor. Source Tab will be updated with the new Modified Date and Modify Reason. The CSA remains approved. The supervisor does not have to approve the changes again.
* When Sales Analysis is clicked through Sales and Transfer work queue or Commercial Sales Analysis Search (side door) CSA ID gets created.

### UI Standards

* Font-size: 12px
* Font-Family: sans-serif
* Font-color: Black
* Top Header: Dark Blue
* Title Bar: Light Blue
* Toolbar Buttons Bar: Dark Blue
* (Note: Take a screenshot and point to the areas of the page and define it once UI design is complete.)

## Frequency Statistics

N/A

## Pre-Condition

Users should only be able to access the CSA application through Improve.Net side door.

Document should be appraisable. Transaction Type should be Sale or Reappraisal Transfer.

## Post-Condition

N/A

## Subsequent Usage

<<Document how data updated by this module will be used by other downstream processes>>

## References

### Data Dictionary

For details on the IMPROVE physical data model data dictionary, refer to section 6.3 in [Main Page Functional Requirements.](https://acgovt.sharepoint.com/:w:/r/sites/IMPROVENET/Requirements/Functional%20Requirements/Main%20Page%20Functional%20Requirements.docx?d=w07eafa5ca213463daaec0aad3df0fadd&csf=1&web=1&e=ytrGhZ)

### Other Documents

|  |  |  |
| --- | --- | --- |
| **#** | **Reference** | **Hyperlink / Location** |
|  | Design Doc | [CSASalesAnalysisDesignDocument](https://acgovt.sharepoint.com/:w:/r/sites/IMPROVENET/_layouts/15/Doc.aspx?sourcedoc=%7B8596B9C8-38AC-4D1F-8697-8BDC11E2B250%7D&file=CSADesignDocument.docx&action=default&mobileredirect=true) |
|  | Mockups | <https://balsamiq.cloud/svv5sin/pr1dm0j/r6BB9> |
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## Concurrency Requirements

N/A

## Terms and Definitions

| **#** | **Term** | **Definition** |
| --- | --- | --- |
|  | CSA | Commercial Sales Analysis |
|  | PGI | Potential Gross Income |
|  | NOI | Net Operating Income |
|  | PC NRA |  |
|  | EGI | Effective Gross Income |
|  | SBE |  |
|  | MVS |  |
|  | FAR |  |
|  | Trans Tax Price |  |
|  | Ind Pur Price | Indicated Purchase Price |
|  | APN | Assessor Parcel Number |
|  | OAR |  |
|  | GIM |  |

# Deviations from Legacy CSA

## Page Deviations

### CSA Landing Page Deviations

**Legacy.Net:** Default Landing Page Screen Shot

Graphical user interface, application, Word

Description automatically generated

**New.Net:** Default Landing Page Screen Shot

Graphical user interface, text, email

Description automatically generated

* **Legacy.Net:** Document, Event Date, Buyer, and Seller are displayed in the top header. **New.Net:** Document, Event Date, Buyer, and Seller are displayed in the Document Frame.
* **Legacy.Net:** APN, Use Cd, Use, Address, APN Count, Ind Pur Price, Adj Sales Price, Trans Tax price, Gross SF Land Area, PC NRA are displayed below the top header. **New.Net:** APN, Use Cd, Use, Address will be displayed in APN frame. APN Count, Ind Pur Price, Adj Sales Price, Trans Tax Price will be displayed in Sale frame. Gross SF, Land Area, PC NRA will be displayed in Prop Char frame.
* **Legacy.Net:** Environment is displayed in top left. **New.Net:** Environment will be displayed in top right.
* **Legacy.Net:** Logged in User ID is not displayed. **New.Net:** Logged in User ID (read only) will be displayed in top right.
* **Legacy.Net:** Refresh Characteristics is in the Edit APN modal. **New.Net:** Refresh Characteristics is in Toolbar.
* **Legacy.Net:** Edit APN button is always enabled. **New.Net:** ‘Edit Primary APN’ will only be enabled if there are more than one APN.
* **Legacy.Net:** Address is displayed with Address, City, State and Zip labels. **New.Net:** Label Address will display the full address.
* **Legagy.Net:** Clear button. **New.Net:** No Clear button.
* **Legacy.Net:** View Images link. **New.Net:** No View Images link**.**
* **Legacy.Net:** Remarks tab. **New.Net:** Comments in Sales Info tab.
* **Label Changes:**
  + **Legacy.Net:** Edit APN -> **New.Net:** Edit Primary APN
  + **Legacy.Net**: Edit -> **New.Net:** Edit CSA
  + **Legacy.Net**: Income Tab->Add New Lease **New.Net:** Income Tab > Add Lease
  + **Legacy.Net**: Remarks -> **New.Net:** Comments

## Functionality Mapping

| **#** | **Legacy.Net** | **New.Net** |
| --- | --- | --- |
|  | No Toolbar | New CSA will have Toolbar |
|  | Save button on each tab | Toolbar – Save |
|  | Clear button on each tab | No Clear button |
|  | Edit APN button | Toolbar – Edit Primary APN |
|  | View Images link | No View Images link |
|  | Edit button | Toolbar- Edit CSA |
|  | Refresh Characteristics in Edit APN modal | Toolbar – Refresh Characteristics |
|  | Remarks Tab | Comments in Sales Info Tab |
|  | Report Tab | Toolbar- Sales Analysis Report |
|  | Address, City, State and Zip as separate labels | Label “Address” includes full address |
|  | Logged in user is not displayed | Logged in user in top right |
|  | No Improve Logo | Improve logo in top left |
|  | No Environment | Environment in top right |

# Functional Requirements

## Access Path

| **FR #** | **Field** | **Format / Event** | **Requirement** |
| --- | --- | --- | --- |
| FR-31-01 | Access CSA through Sales and Transfer Work Queue | Menu | Commercial Sales Analysis application/window can be accessed from   * Channel – Appraisal * Category- Sales and Transfers Work Queue   + Select a Sales and Transfer Work Queue * Subcategory – Appraise * Sales Analysis * C/I Improved Property Analysis * Vacant Land Analysis |
| FR-31-03 |  | CSA – Through Sales & Transfer and Work queue – Set | * See Open CSA FR -361-04 – [Handling for Appraisal](../Open%20CSA%20FR.docx) section |
| FR-31-04 |  | CSA – through Commercial Sales Analysis | * See Open CSA FR -361-05 – [Freeform](../Open%20CSA%20FR.docx) section |
| FR-31-05 | Access CSA through Commercial Sales Analysis Search | Menu | Commercial Sales Analysis Search window can be accessed from   * Channel – Appraisal * Category – Commercial Sales Analysis Search   + Search for the sale by entering a Document Date range, Parcel, Use Code, and/or Document number, with the most common method search by APN, that may or may not have Sales Analysis * Sales Analysis * C/I Improved Property Analysis * Vacant Land Analysis |
| FR-31-03 | Add Lease Modal | Menu | Add Lease Modal can be accessed from Income Tab   * Click Add Lease button |
| FR-31-05 | Lease Application | Menu | Note: Lease search page has the same fields as Lease modal and can be accessed from Lease Search   * Channel – Appraisal * Category- CSA Lease Search * Open Lease |

## Security

| **FR #** | **Field** | **Format / Event** | **Requirement** |
| --- | --- | --- | --- |
| FR-32-01 | N/A | Access | * A user with menu access to the Appraisal 🡪 Appraisal menu will have access to all windows * No control is enabled or disabled depending on the security level of the user. |

### Roll Close Mode

| **FR #** | **Field** | **Format / Event** | **Requirement** |
| --- | --- | --- | --- |
| FR-321-01 | N/A | Access | * N/A |

## Commercial-Industrial Sales Input Window

| **FR #** | **Field** | **Format / Event** | **Requirement** |
| --- | --- | --- | --- |
| FR-33-02 | Window Content | Toolbar | Toolbar contains these buttons:   * Save * Edit Primary APN * Refresh Characteristics * Sales Analysis Report * Edit CSA |
| FR-33-03 | Window Content | Frames | Window contains:  Document Frame:   * Document * Event Date * Buyer * Seller   APN Frame:   * APN * Address * Use Cd * Use   Sale Frame:   * APN Count * Ind Pur Price * Adj Sales price * Trans tax Price   Property Characteristics Frame:   * Gross SF * PC NRA * Land Area |
| FR-33-04 | Window Content | Tabs | Tabs:   * Sales Info * Prop Characteristics * Income * Expenses * Adjustments * Income Analysis & Value Ind * Sources |
| FR-33-05 | Window | Standards | * All field labels are per standard. * All column headings are per standard. * Refer to SharePoint document [IMPROVE.NET UI\_ErrorMessage Guidelines](https://acgovt.sharepoint.com/:w:/s/IMPROVENET/EY3QBy8h-G1Mk7hOd-0cUpUBQRrqWP1F0-2OEWmQSddRsg?e=odlET9) |

### Main Page

| **FR #** | **Field** | **Format / Event** | **Requirement** |
| --- | --- | --- | --- |
| FR-331-01 | N/A | N/A | Application Main page will contain   * Improve Logo * Worker ID – read only |
| FR-331-02 | N/A | N/A | * Application Title – CSA * Application Name – CSA |
| FR-331-03 | N/A | N/A | * At the application startup, cursor will be in the Sale Info tab >Anticipated Use dropdown field |

### Default Display

Specify status and contents of fields and buttons when window is opened.

| **FR #** | **Field** | **Format / Event** | **Requirement** |
| --- | --- | --- | --- |
| FR-331-01 | Window | Default Display -Read-Only Mode | * When CSA is opened in read-only mode, the page loads: * Page title:   + See [Page Title](#_Page_Title) section for the details. * Toolbar buttons:   + See [Toolbar Menu](#_Toolbar_Buttons) section for the details on the toolbar behavior. * Document Frame fields read-only:   + See [Document Frame](#_Document_Frame) for the details for how the Document Frames are populated. * APN, Sale, and Prop Char Frame fields read-only:   + See [APN, Sale, and Prop Char Frame](#_APN,_Sale,_and) for the details for how the APN, Sale, and Prop Char Frame fields are populated. * The Sale Info tab is the default selected tab.   + See [Sales Info Tab – Click – Action](#_Sales_Info_Tab_1) for how the Sales info tab is populated. |
| FR-331-02 | Window | Default Display-Editable Mode | * When CSA is opened in edit mode, the page loads: * Page title:   + See [Page Title](#_Page_Title) section for the details. * Toolbar buttons:   + See [Toolbar Menu](#_Toolbar_Buttons) section for the details on the toolbar behavior. * Document Frame fields read-only:   + See [Document Frame](#_Document_Frame) for the details for how the Document Frames are populated. * APN, Sale, and Prop Char Frame fields read-only:   + See [APN, Sale, and Prop Char Frame](#_APN,_Sale,_and) for the details for how the APN, Sale, and Prop Char Frame fields are populated. * The Sale Info tab is the default selected tab.   + See [Sales Info Tab – Click – Action](#_Sales_Info_Tab_1) for how the Sales info tab is populated. |
| FR-331-03 | Window | Default Display-Inquiry Mode | * When CSA is opened in inquiry mode, the page loads: * Page title:   + See [Page Title](#_Page_Title) section for the details. * Toolbar buttons:   + See [Toolbar Menu](#_Toolbar_Buttons) section for the details on the toolbar behavior. * Document Frame fields read-only:   + See [Document Frame](#_Document_Frame) for the details for how the Document Frames are populated. * APN, Sale, and Prop Char Frame fields read-only:   + See [APN, Sale, and Prop Char Frame](#_APN,_Sale,_and) for the details for how the APN, Sale, and Prop Char Frame fields are populated. * The Sale Info tab is the default selected tab.   + See [Sales Info Tab – Click – Action](#_Sales_Info_Tab_1) for how the Sales info tab is populated. |
| FR-331-04 | Window | Default Display | * Document frame fields read-only:   + Document   + Event Date   + Buyer   + Seller   + Doc Image |
| FR-331-05 | Window | Default Display | * APN Frame read-only:   + APN   + Address   + Use Cd   + Use * Sale Frame read-only:   + APN Count   + Ind Pur Price   + Adj Sales price   + Trans tax Price * Property Characteristics Frame read-only:   + Gross SF   + PC NRA   + Land Area |
| FR-331-06 | Window | Default Display | * Tabs:   + Sale Info   + Prop Characteristics   + Income   + Expenses   + Adjustments   + Income Analysis & Value Ind   + Sources |

### Toolbar Menu

Worker/Supervisor view



| **FR #** | **Field** | **Format / Event** | **Requirement** |
| --- | --- | --- | --- |
| FR-332-01 | Save | Worker/Supervisor | * Always displayed * Enabled   + Edit mode * Disabled   + Read-Only mode   + Inquiry mode |
| FR-332-02 | Edit Primary APN | Worker/Supervisor | * Always displayed * Enabled   + if more than one APN * Disabled   + if only one APN |
| FR-332-03 | Refresh Characteristics | Worker/Supervisor | * Always displayed * Enabled   + Edit mode * Disabled   + Read-Only mode   + Inquiry mode |
| FR-332-04 | Sales Analysis Report | Worker/Supervisor | * Always displayed * Enabled   + Edit mode * Disabled   + Read-Only mode   + Inquiry mode |
| FR-332-05 | Edit CSA | Worker/Supervisor | * Always displayed * Disabled   + Edit mode * Enabled   + Read-Only mode   + Inquiry mode |

#### Save - Click – Action

| **FR #** | **Field** | **Format / Event** | **Requirement** |
| --- | --- | --- | --- |
| FR-3321-01 | Save | Click | * See Save Click on each tab. |

#### Edit Primary APN – Click – Action

| **FR #** | **Field** | **Format / Event** | **Requirement** |
| --- | --- | --- | --- |
| FR-3322-01 | Edit Primary APN | Click | * When the ‘Edit Primary APN’ is clicked, the system will open the Primary APN modal window. * See [Edit Primary APN](#_Edit_Primary_APN) window section for the details on the functional requirements. |
| FR-3322-02 | Edit Primary APN | Save | * Update Sale Info Table * Check Property ID, Sort Parcel, and Print Parcel * UPDATE ieaown.ie\_csa\_sale\_info * SET   + property\_id = property\_id of primary APN selected,   + update\_worker = Logged in\_workerID,   + update\_ts = current timestamp, * End if |

#### Refresh Characteristics – Click – Action

| **FR #** | **Field** | **Format / Event** | **Requirement** |
| --- | --- | --- | --- |
|  | Refresh Characteristics | Click | * When the ‘Refresh Characteristics’ button is clicked, the system will refresh the page and import the changes done in Improve into the CSA. * *Note: The property and sales information in the CSA Document, APN, Sale, and Prop Char frames are not editable through CSA. If changes are required, they must be made through the appropriate section in IMPROVE (ex. PC NRA must be updated through Property Characteristics Maintenance) then brought into the CSA.* |
| FR-39-01 | MVS Codes | Get | * Get all the MVS related field codes * Set variable: **MVS Codes** = [Get MVS Field codes](#_Get_MVS_Field) |
| FR-39-03 | Prop Char Event by Doc | Get | * Get the certain CSA related Prop Char attributes as of the Event TS of the document passed * Set variable: **Prop Char Event by Doc** = [Get Pce As Of Coo Evt Ts By Doc](#_Get_Pce_As) passing *(*DOC\_PREFIX , DOC\_SERIES*)* |
| FR-39-04 | Prop Char Event by Doc | Set variables | * Loop through **Prop Char Event by Doc** and set the following variables:   + Total Bldg Area = Sum (tot\_building\_area)   + TotParking = Sum (tot\_parking)   + MinLandImpRatio = Min (land\_imp\_ratio)   + MaxLandImpRatio = Max (land\_imp\_ratio)   + MinNumBldg = Min (num\_buildings)   + MaxNumBldg = Max (num\_buildings)   + TotLotSize = sum (lot\_size\_sq\_feet)   + MinFloorAreaRatio = min (floor\_area\_ratio)   + MaxFloorAreaRatio = max (floor\_area\_ratio)   + End Loop |
| FR-39-05 | PROPERTY\_ID\_ARRAY | Set variable | * + - Set variable: **PROPERTY\_ID\_ARRAY** = build a comma delimited string of all the **Prop Char Event by Doc**.PROPERTY\_ID values |
| FR-39-06 | EVENT\_TS | Set variable | * Set variable: **EVENT\_TS** = **Prop Char Event by Doc**.event\_ts *from the any row* |
| FR-39-08 | Building | Get for Property ID Array | * Get the building table columns for all the property ID’s passed   + Set variable: **Building** = [Get Building](#_Get_Building) passing (**PROPERTY\_ID\_ARRAY**)   + Filter **Building** EFFECTIVE\_DT <= DATE(**EVENT\_TS** ) AND (END\_DT >= DATE(**EVENT\_TS** ) OR END\_DT is NULL) AND (DEMOLISHED\_FL IS NULL OR DEMOLISHED\_FL <> ‘Y’)   + Sort **Building** by property\_id ASC, building\_num ASC, effective\_dt DESC * Loop thru the **Building**   + Check the ***current*** row with the ***next*** row, if the property\_id and building\_num column values on those 2 rows are the same then discard the ***next*** row.   End Loop |
| FR-39-09 | Building (sbe\_code = blank, mvs\_code = blank) | Get for Property ID Array, set CSA variables | * Filter **Building** to sbe\_code <> “”   + IF **Building** has rows THEN     - Sort **Building** to sbe\_code ASC     - MinSbeCode = **Building**.sbe\_code *from the 1st row*     - Sort **Building** to sbe\_code DESC     - MaxSbeCode = **Building**.sbe\_code *from the 1st row*   + END IF * Clear all filters on **Building** * Filter **Building** to mvs\_code <> “”   + IF **Building** has rows THEN     - Sort **Building** to mvs\_code ASC     - MinMvsCode = **Building**.mvs\_code *from the 1st row*     - Sort **Building** to mvs\_code DESC     - MaxMvsCode = **Building**.mvs\_code *from the 1st row*  1. END IF |
| FR-39-10 | Building | Get for Property ID Array, set CSA variables | * Loop through **Building** and set the following variables:   + TotNetRentableArea = Sum (net\_rentable\_area)   + MinBuiltYr = Min (built\_yr)   + MaxBuiltYr = Max (built\_yr)   + MinEffectiveYr = Min (effective\_yr)   + MaxEffectiveYr = Max (effective\_yr)   + MinPctBuiltOut = Min (pct\_built\_out)   + MaxPctBuiltOut = Max (pct\_built\_out)   + MinPctOffice = Min (pct\_office)   + MaxPctOffice = Max (pct\_office)   + MinNumStories = Min (num\_stories)   + MaxNumStories = Max (num\_stories)   + MinAvgActualHt = Min (avg\_actual\_ht)   + MaxAvgActualHt = Max (avg\_actual\_ht) * End Loop |
| FR-39-11 | Land | Get for Property ID Array, set CSA variables | * Get the Land table columns for all the property ID’s passed * Set variable: **Land** = [Get Land](#_GET_LAND) (**PROPERTY\_ID\_ARRAY**) * Filter **Land** EFFECTIVE\_DT <= DATE(**EVENT\_TS** ) AND (END\_DT >= DATE(**EVENT\_TS** ) OR END\_DT is NULL) * Sort **Land** by EFFECTIVE\_DT DESC * SepticFl = **Land**.septic\_fl * WellFl = **Land**.well\_fl |
| FR-39-12 | Topography | Get for Property ID Array, set CSA variables | * Get the topography table columns for all the property ID’s passed * Set variable**: Topography** = [Get Topography](#_GET_TOPOGRAPHY) (**PROPERTY\_ID\_ARRAY**) * Filter **Topography** to " EFFECTIVE\_DT <= DATE(**EVENT\_TS** ) AND (END\_DT >= DATE(**EVENT\_TS** ) OR END\_DT is NULL) * IF **Topography** has rows THEN   + TopoCd = **Topography**.topo\_cd from the 1st row  1. END IF |
| FR-39-13 | Zoning | Get for Property ID Array, set CSA variables | * Get the zoning table columns for all the property ID’s passed * **Zoning** = [Get Zoning](#_Get_Zoning) passing (**PROPERTY\_ID\_ARRAY**) * IF **Zoning** has rows THEN   + ZoningCd = **Zoning**.zoning\_cd from the 1st row   + AgencyCd = **Zoning**.agency\_cd from the 1st row * END IF |
|  | CSA Sales Info | Insert into CSA tables | Populate the CSA Sales Info table   * Insert into table IE\_CSA\_SALE\_INFO:   + csa\_id = **CSA ID**   + csa\_type = **Select Type**   + doc\_prefix = **DOC\_PREFIX**   + doc\_series = **DOC\_SERIES**   + property\_id = **Primary Property Id**   + use\_cd = **Prop Char Event by Doc.**use\_cd   + situs\_city\_name = **Prop Char Event by Doc**.situs\_city\_name   + tot\_building\_area = TotBldgArea   + tot\_net\_rent\_area = TotNetRentableArea   + tot\_lot\_size = TotLotSize   + zoning\_cd = ZoningCd   + zoning\_agency\_cd = AgencyCd |
| FR-39-17 | CSA Prop Char | Insert into CSA tables | * IF **Select Type** = 933 THEN (CSA Commercial/Industrial)   + Update table IE\_CSA\_PROP\_CHAR:     - csa\_id = **CSA ID**     - tot\_parking = TotParking   End If |
| FR-39-18 | CSA Prop Char | Insert into CSA tables | IF **Select Type** = 933 THEN (CSA Commercial/Industrial) [continued]   * If **Building** has row/s THEN   + Update table IE\_CSA\_PROP\_CHAR:   + sbe\_class\_low = MinSbeCode   + sbe\_class\_hi = MaxSbeCode   + mvs\_class\_low = MinMvsCode   + mvs\_class\_hi = MaxMvsCode   + bldg\_built\_yr\_low = MinBuiltYr   + bldg\_built\_yr\_hi = MaxBuiltYr   + bldg\_eff\_yr\_low = MinEffectiveYr   + bldg\_eff\_yr\_hi = MaxEffectiveYr   + pct\_built\_out\_low = MinPctBuiltOut   + pct\_built\_out\_hi = MaxPctBuiltOut   + pct\_office\_low = MinPctOffice   + pct\_office\_hi = MaxPctOffice   + num\_buildings\_low = MinNumBldg   + num\_buildings\_hi = MaxNumBldg   + num\_stories\_low = MinNumStories   + num\_stories\_hi = MaxNumStories   + avg\_actual\_ht\_low = MinAvgActualHt   + avg\_actual\_ht\_hi = MaxAvgActualHt   + land\_imp\_ratio\_low = MinLandImpRatio   + land\_imp\_ratio\_hi = MaxLandImpRatio   + far\_low = MinFloorAreaRatio   + far\_hi = MaxFloorAreaRatio * END IF |
| FR-39-22 | Vacant Land | Insert into CSA tables | * IF **Select Type** passed = 934 THEN (CSA Vacant Land)   + CSA Vacant Land entity   + Insert into table IE\_CSA\_VL\_CHAR:     - csa\_id = **CSA ID**     - slope\_cd = **Prop Char Event by Doc**.slope\_cd *from the first row*     - view\_cd = **Prop Char Event by Doc**.view\_cd *from the first row*     - topo\_cd = TopoCd     - septic\_tank\_fl =SepticFl     - well\_fl = WellFl   + CSA Vacant Land finance entity     - Insert into table IE\_CSA\_VL\_FINANCE:     - csa\_id = **CSA ID**   + CSA Vacant Land purchase entity   + Insert into table IE\_CSA\_VL\_PURCHASE:     - csa\_id = **CSA ID**     - inc\_pur\_unknown\_fl = ‘Y’   END IF |

#### Sales Analysis Report – Click – Action

| **FR #** | **Field** | **Format / Event** | **Requirement** |
| --- | --- | --- | --- |
| FR-3324-01 | Sales Analysis Report | Click | * See [‘Sales Analysis Report’](#_Sales_Analysis_Report) for the details. |

#### Edit CSA – Click – Action

See ‘Edit CSA’ modal window for the details.

| **FR #** | **Field** | **Format / Event** | **Requirement** |
| --- | --- | --- | --- |
| FR-3325-01 | Edit CSA | Click | * See [‘Modify Reason’](#_Modify_Reason_Modal_1) modal window for the functional details. |

### Document Frame

| **FR #** | **Field** | **Format / Event** | **Requirement** |
| --- | --- | --- | --- |
| FR-333-01 | Document Frame | Open CSA window | * When CSA is launched the system will get the Document Frame data and populate it into the page. * **Document Frame** = Get [Document Frame](#_Get_Sale_Info) Data passing (CSA\_ID) * Populate the Document Frame data on the page. * Read only * For technical details, refer to section [Property Info Fields](#_Get_Prop_Characteristics_1) |

### APN, Sale, and Prop Char Frame

| **FR #** | **Field** | **Format / Event** | **Requirement** |
| --- | --- | --- | --- |
| FR-334-01 | APN, Sale, and Prop Char Frames | Open CSA window | * When CSA is launched the system will get the Document Frame data and populate it into the page. * **Document Frame** = Get [APN, Sale and Prop Char Frames](#_Get_Property_Info_1) Data passing (CSA\_ID) * Populate the Document Frame data on the page. * Read only * For technical details, refer to section [Property Info Fields](#_Property_Info_Fields) |

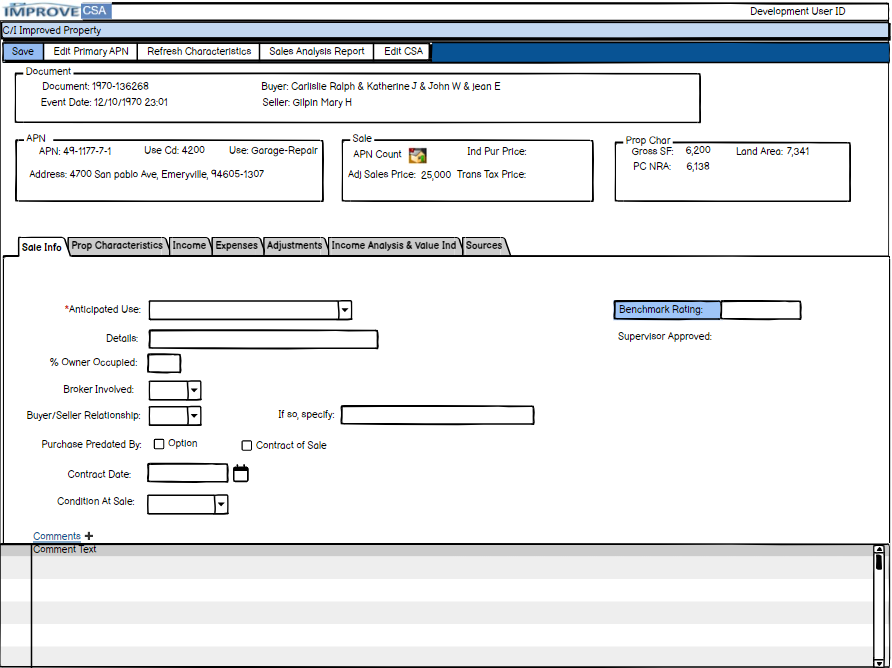
### Page Title

**C/I Improved Property and Vacant Land**

| **FR #** | **Field** | **Format / Event** | **Requirement** |
| --- | --- | --- | --- |
| FR-335-01 | Page Title | Open CSA window | * When CSA is launched the system will get the page title and populate it into the page. * **Page Title** = Get [Page Title](#_Get_Page_Title) Data passing (CSA\_TYPE) * Populate the Page Title on the page. * Read only |

### Sales Info Tab

**Sales Info tab**



#### Sales Info Tab - Click - Action

<<Fields which invoke actions like lose focus, tab out, change etc>>

| **FR #** | **Field** | **Format / Event** | **Requirement** |
| --- | --- | --- | --- |
| FR-3361-01 | Sale Info Tab | Click | * When the Sale Info Tab is clicked the system will get the Sales info tab data and populate it into the form. * **Sale Info Tab data** = [Get Sale info Tab](#_Get_Sale_Info) Data passing (CSA\_ID) * Populate the **Sale Info Tab data** into the Sale Info Tab * See the UI fields to database field mapping in the section [Sale Info Fields](#_Sale_Info_Fields) |
| FR-3361-02 | Sale Info Tab (Comments) | Click | * **Comments** = [Get Comments](#_Comments_Tab) Data passing (CSA\_ID)   + See [Comments](#_Add/Edit_Comment_Modal) section for the functional requirements. |

#### Sales Info Tab Fields

For technical details, refer to section [Sale Info Fields](#_Sale_Info_Fields)

| **FR #** | **Field** | **Format / Event** | **Requirement** |
| --- | --- | --- | --- |
| FR-33362-01 | Anticipated Use | * Alphanumeric * Upshifted * Max length: 50 | * Anticipated Use * Drop Down * Required * Value: see [Anticipated Use drop down](#_Anticipated_Use_Drop) * Default selection is blank |
| FR-33362-02 | Details | * Alphanumeric * Upshifted * Max length: 30 | * Textbox * Conditionally editable * Default – Blank |
| FR-33362-03 | % Owner Occupied | * Numeric * Max length: 3 | * Textbox * Default- Blank |
| FR-33362-04 | Broker Involved | * Alphanumeric * Upshifted * Max length: 1 | * Drop Down Yes/No * Default blank |
| FR-33362-05 | Buyer/Seller relationship | * Alphanumeric * Upshifted * Max length: 1 | * Drop Down Yes /No * Conditionally Required * Default blank |
| FR-33362-06 | Is so, specify | * Numeric * Max length:30 | * Textbox * Conditionally required |
| FR-33362-07 | Purchase Predated By | * Unchecked | * Checkbox * Default Unchecked |
| FR-33362-08 | Contract Date | * Numeric * Max length:10 | * Calendar * Conditionally required * Contract Date must be less than or equal to Event date |
| FR-33362-09 | Contract of Sale | * N/A | * Checkbox * Default Unchecked |
| FR-33362-10 | Condition At Sale | * Alphanumeric * Upshifted * Max length: 1 | * Condition At Sale * Values: see [Condition at Sale drop down](#_Condition_At_Sale) |
| FR-33362-11 | Benchmark Rating | * Alphanumeric * Upshifted * Max length: 1 | * Display based on selection picked in Benchmark Rating drop-down field on Income and Analysis & value Ind tab * Read only |
| FR-33362-12 | Supervisor Approved | * Alphanumeric * Upshifted * Max length: 3 | * Display based on value entered in Supervisor Approved Dropdown field in Source tab * Read only |

#### Save - Click – Action

| **FR #** | **Field** | **Format / Event** | **Requirement** |
| --- | --- | --- | --- |
| FR-3363-01 | Save | Click | * Perform Data Validations * If errors   + Display error message   + Do not save * If no errors proceed to next FR * If no errors update the database with the input values from the form |
| FR-3363-02 | Save | Click (Update DB) | * Update the database: * Form fields in the UI are saved to the database. * See the UI fields to database field mapping in the section [Sale Info Fields](#_Sale_Info_Fields) |
| FR-3363-03 | Save | Click (Sales Info Tab – % Owner Occupied = 100 % then Income and Expenses tabs are required to be disabled | * If % Owner Occupied is 100 % then Income and Expense tabs should be disabled * If % Owner Occupied is 100 percent, then   + Disable Income and Expenses tabs |
| FR-3363-04 | Save | Click (Sale Info Tab- % Owner Occupied= cannot be 100 if Income or Expense exists | * % Owner Occupied cannot be 100% if Income or expense exists * If Income and Expense exist and value entered in % owner occupied 100 then   + Open a Delete Income and Expenses modal window * See [Delete Income and Expenses Modal](#_Delete_Income_and_1) Window for details |

#### Save - Click – Data Validations

| **FR #** | **Field** | **Format / Event** | **Requirement** |
| --- | --- | --- | --- |
| FR-3364-01 | Save | Click (Sales Info Tab – Anticipated Use – Required) | * If “Anticipated Use” drop down field is not selected then,   + Display an error message ‘Anticipated Use is required.’ * End If |
| FR-3364-02 | Save | Click (Sales Info Tab – Buyer/Seller Relationship = Yes then relationship is required | * If Buyer/Seller Relationship field is set to “Yes” then “If so, specify “cannot be blank. * If Buyer/Seller Relationship field is set to “Yes” and “If so, specify” is blank then   + Display an error message “Buyer/Seller relationship description is required.” * End If |
| FR-3364-03 | Save | Click (Sales Info Tab – Buyer/Seller Relationship = No then relationship is not required | * If “Buyer/Seller Relationship” field is set to “No” then “if so, specify” should be blank. * If “Buyer/Seller Relationship” field is set to “No” and “if so, specify” is not blank then   + Display an error message “Do not specify Buyer/Seller relationship if none is indicated.” * End If |
| FR-3364-04 | Save | Click (Sales Info Tab – Buyer/Seller Relationship = Blank then relationship is not required | * If “Buyer/Seller Relationship” field is set to “Blank” then “if so, specify” should be blank. * If “Buyer/Seller Relationship” field is set to “Blank” and “if so, specify” is not blank then   + Display an error message “Do not specify Buyer/Seller relationship if none is indicated.” * End If |
| FR-3364-05 | Save | Click (Sales Info Tab – If so, specify = Text then “Buyer/Seller Relationship is required | * If “if so, specify” field has text then “Buyer/Seller Relationship” should be set to Yes * If “if so, specify” has text and “Buyer/Seller Relationship” field is set to No then   + Display an error message “Do not specify Buyer/Seller relationship if none is indicated.” * End If |
| FR-3364-06 | Save | Click (Sales Info Tab – If so, specify = Text then “Buyer/Seller Relationship is required | * If “if so, specify” field has text then “Buyer/Seller Relationship” should be set to Yes      * If “if so, specify” has text and “Buyer/Seller Relationship” field is set to Blank then   + Display an error message “Do not specify Buyer/Seller relationship if none is indicated.” * End If |
| FR-3364-08 | Save | Click (Sales Info Tab – % Owner Occupied = less than 0 or greater than 100 | * % Owner Occupied must be a whole number between 0 and 100 * If value entered in % owner occupied is not a whole number between 0 and 100 then   + Display an error message, % Owner Occupied must be a whole number between 0 and 100. * End If |
| FR-3364-10 | Save | Click (Sale Ino Tab - % Owner Occupied= Data exists in Income or expense tab then % Owner Occupied should be less than 100% | * % Owner Occupied cannot be 100% if Income or expense exists * If Income and Expense exist and value entered in % owner occupied 100 then   + Display an error message, % Owner Occupied must be a whole number between 0 and 100. * End If |
| FR-3364-11 | Save | Click (Sale Info Tab - Contract of Sale = Checked | * If “Contract of Sale” field is checked then Contract Date cannot be blank * If “Contract of Sale” field is checked and Contract Date is blank   + Display an error message “Contract date is required.” * End If |

#### Add Comment -Click -Action

| **FR #** | **Field** | **Format / Event** | **Requirement** |
| --- | --- | --- | --- |
| FR-3365-01 | Comment | Click (Plus icon) | * When Comment button is clicked, the system will open the Comment Modal * See [Add/Edit Comment Modal](#_Add/Edit_Comment_Modal) Window for the functional requirements |

#### Edit Comment – Click – Action

| **FR #** | **Field** | **Format / Event** | **Requirement** |
| --- | --- | --- | --- |
| FR-3365-01 | Comment | Click (Edit icon) | * When Edit button is clicked, the system will open the Comment Modal * See [Add/Edit Comment Modal](#_Add/Edit_Comment_Modal) Window for the functional requirements |

### Prop Characteristics Tab

A picture containing graphical user interface

Description automatically generated

#### Prop Char - Click – Action

| **FR #** | **Field** | **Format / Event** | **Requirement** |
| --- | --- | --- | --- |
| FR-3371-01 | Prop Characteristics Tab | Click | * When Prop Characteristics Tab is clicked the system will get the Prop Characteristics tab data and populate it into the form. * **Prop Characteristics** **Tab data** = [Get Prop Characteristics](#_Get_Prop_Characteristics_2) passing CSA ID * Populate the **Prop Characteristics** **Tab data** into the Prop Characteristics Tab * Read Only * *Note: The information on this tab is generated from the property characteristics in IMPROVE and is not editable through the CSA. Changes can only be made by updating the appropriate data in IMPROVE and importing the changes into the CSA by clicking on* ***(Toolbar-******Refresh Characteristics****).* |

#### Prop Characteristics Tab Fields

For technical details, refer to section [Prop Characteristics Fields](#_Get_Prop_Characteristics_1)

| **FR #** | **Field** | **Format / Event** | **Requirement** |
| --- | --- | --- | --- |
| FR-3372-01 | Zoning | * Alphanumeric * Max length: 8 | * Zoning * Note: The primary zoning property characteristics of the primary APN. * Read only |
| FR-3372-02 | Gross Sq Ft | * Numeric * Max length: 4 | * Gross Sq Ft * Note: Total summary building areas for all APNs if more than 1 APN in the document. * Read only |
| FR-3372-03 | Net Rentable Area | * Numeric * Max length: 4 | * Net Rentable Area * Note: Total NRA for all APNs if more than 1 APN in the document. |
| FR-3372-04 | Land Area | * Numeric * Max length: 4 | * Land Area * Note: Total lot size for all APNs if more than 1 APN in the document. * Read only |
| FR-3372-05 | Parking | * Numeric * Max length: 4 | * Parking * Total parking for all APNs if more than 1 APN in the document. * Read only |
| FR-3372-06 | SBE Low | * Alphanumeric * Max length: 9 | * SBE Low * Ranges display Low and High values if there are more than 1 APN in the document, otherwise Low and High values are the same and are the values for the 1 APN in the document. |
| FR-3372-07 | SBE High | * Alphanumeric * Max length: 9 | * SBE High |
| FR-3372-08 | MVS Low | * Alphanumeric * Max length: 9 | * MVS Low |
| FR-3372-09 | MVS High | * Alphanumeric * Max length: 9 | * MVS High |
| FR-3372-10 | Year Built Low | * Numeric * Max length: 2 | * Year Built Low |
| FR-3372-11 | Year Built High | * Numeric * Max length: 2 | * Year Built High |
| FR-3372-12 | Effective Year Low | * Numeric * Max length: 2 | * Effective Year Low |
| FR-3372-13 | Effective Year High | * Numeric * Max length: 2 | * Effective Year High |
| FR-3372-14 | Percentage Built Out Low | * Numeric * Max length: 2 | * Percentage Built Out Low |
| FR-3372-15 | Percentage Built Out High | * Numeric * Max length: 2 | * Percentage Built Out High |
| FR-3372-16 | Percentage Office Low | * Numeric * Max length: 3 | * Percentage Office Low |
| FR-3372-17 | Percentage Office High | * Numeric * Max length: 3 | * Percentage Office High |
| FR-3372-18 | No of Bldgs Low | * Numeric * Max length: 4 | * No of Bldgs Low |
| FR-3372-19 | No of Bldgs High | * Numeric * Max length: 4 | * No of Bldgs High |
| FR-3372-20 | Stories Low | * Numeric * Max length: 4 | * Stories Low |
| FR-3372-21 | Stories High | * Numeric * Max length: 4 | * Stories High |
| FR-3372-22 | Wall Height Low | * Numeric * Max length: 4 | * Wall Height Low |
| FR-3372-23 | Wall Height High | * Numeric * Max length: 4 | * Wall Height High |
| FR-3372-24 | Land Imp Ratio Low | * Numeric * Max length: 3 | * Land Imp Ratio Low |
| FR-3372-25 | Land Imp Ratio High | * Numeric * Max length: 3 | * Land Imp Ratio High |
| FR-3372-26 | FAR Low | * Numeric * Max length: 7 | * FAR Low |
| FR-3372-27 | FAR High | * Numeric * Max length: 7 | * FAR High |

### Income tab

A picture containing table

Description automatically generated

#### Income Tab – Click – Action

| **FR #** | **Field** | **Format / Event** | **Requirement** |
| --- | --- | --- | --- |
| FR-3381-01 | Income Tab | Click | * When Income Tab is clicked the system will get the Income tab data and populate it into the form. * Income Tab Data = [Get Income Tab](#_Get_Income)   Populate the Income **Tab data** into the Income tab   * For technical details, refer to [Income Fields](#_Income_Fields) |

#### Income Tab Fields

| **FR #** | **Field** | **Format / Event** | **Requirement** |
| --- | --- | --- | --- |
| FR-3382-01 | Total Rent(Current, Anticipated) | Numeric | * Calculation: Sum of Current Rent and Anticipated Rent * Read only |
| FR-3382-02 | % Occupancy | Numeric | * Read only |
| FR-3382-03 | Occupied Sq Ft | Numeric | * Calculation: Sum of Sq FT Leased/Available * Read only |
| FR-3382-04 | Total Sq Ft: | Numeric | * Calculation: Sum of Sq FT Leased/Available * Read only |
| FR-3382-05 | Total Rent | Numeric | * Calculation: Sum of Current Rent and Anticipated Rent * Read only |

#### Add Lease – Click – Action

| **FR #** | **Field** | **Format / Event** | **Requirement** |
| --- | --- | --- | --- |
| FR-3383-01 | Add | Click | * When + button is clicked the system will open the [add / edit lease modal](#_Add/Edit_Lease_Modal) with all blank fields |

#### Edit Lease – Click – Action

| **FR #** | **Field** | **Format / Event** | **Requirement** |
| --- | --- | --- | --- |
| FR-3384-01 | Edit | Click | * When the edit button is clicked the system will get the Lease info data and populate it into [add / edit lease modal](#_Add/Edit_Lease_Modal) * **Lease info data** = Get [Lease info](#_Get_Lease) Data passing (Lease\_Id) * Populate the Lease Info **data** into the Lease Modal * See the UI fields to database field mapping in the section [Lease Info Fields](#_Edit_Lease_Fields) |

#### Delete Lease– Click – Action

| **FR #** | **Field** | **Format / Event** | **Requirement** |
| --- | --- | --- | --- |
| FR-3385-01 | Delete | Click | * When delete is clicked the system will open [Delete Lease Modal Window](#_C/I_Improved_Property). |

#### Delete Lease – Click – Validation

| **FR #** | **Field** | **Format / Event** | **Requirement** |
| --- | --- | --- | --- |
| FR-3386-01 | Delete Lease | Click - Validation | * N/A |

### Expenses Tab

Graphical user interface, application, table

Description automatically generated

#### Expenses Tab - Click - Action

| **FR #** | **Field** | **Format / Event** | **Requirement** |
| --- | --- | --- | --- |
| FR-3391-01 | Expenses Tab | Click | * When Expenses Tab is clicked the system will get the Expenses tab data and populate it into the form. * **Expenses data =** [Expenses Tab](#_Get_Expenses_Tab)Data passing (CSA\_ID) * Populate the **Expenses** **Tab data** into the Expenses Tab * For technical details, refer to [Expenses Fields](#_Expenses_Fields) |

#### Expenses Tab Fields

For technical details, refer to section [Expenses Fields](#_Expenses_Fields)

| **FR #** | **Field** | **Format / Event** | **Requirement** |
| --- | --- | --- | --- |
| FR-3393-01 | Use for OAR | * Checkbox | * Checkbox * Default is unchecked |
| FR-3393-02 | Owner’s Amount  Management | * Numeric * Max length: 15 | * Textbox * Conditionally editable |
| FR-3393-03 | Owner’s Amount Management $/NRA SF or Owner’s Amount Management $/Gross SF | * Numeric | * Read only * If Net Rentable Area > 0, calculated as Owner’s Amount / Net Rentable Area and titled it as “$/NRA SF”. * If Net Rentable Area is unknown or 0 and Gross Sq Ft > 0, calculated as Owner’s Amount / Gross Sq Ft and titled it as “$/Gross SF”. * Round   + Example: Round 45.567 to 45.57 |
| FR-3393-04 | Owner’s Amount Insurance | * Numeric * Max length: 15 | * Textbox * Conditionally editable |
| FR-3393-05 | Owner’s Amount Insurance $/NRA SF or Owner’s Amount Insurance $/Gross SF | * Numeric | * Read only * If Net Rentable Area > 0, calculated as Owner’s Amount / Net Rentable Area and titled it as “$/NRA SF”. * If Net Rentable Area is unknown or 0 and Gross Sq Ft > 0, calculated as Owner’s Amount / Gross Sq Ft and titled it as “$/Gross SF”. |
| FR-3393-05 | Owner’s Amount Legal/Accounting | * Numeric * Max Length:15 | * Textbox * Conditionally editable |
| FR-3393-06 | Owner’s Amount Legal/Accounting $/NRA SF or Owner’s Amount Legal/Accounting $/ Gross SF | * Numeric | * Read only * If Net Rentable Area > 0, calculated as Owner’s Amount / Net Rentable Area and titled it as “$/NRA SF”. * If Net Rentable Area is unknown or 0 and Gross Sq Ft > 0, calculated as Owner’s Amount / Gross Sq Ft and titled it as “$/Gross SF”. |
| FR-3393-07 | Owner’s Amount Exterior Maintenance | * Numeric * Max Length:15 | * Textbox * Conditionally editable |
| FR-3393-08 | Owner’s Amount Exterior Maintenance $/NRA SF or Owner’s Amount Exterior Maintenance $/Gross SF | * Numeric | * Read only * If Net Rentable Area > 0, calculated as Owner’s Amount / Net Rentable Area and titled it as “$/NRA SF”. * If Net Rentable Area is unknown or 0 and Gross Sq Ft > 0, calculated as Owner’s Amount / Gross Sq Ft and titled it as “$/Gross SF”. |
| FR-3393-09 | Owner’s Amount Interior Maintenance | * Numeric * Max Length:15 | * Textbox * Conditionally editable |
| FR-3393-10 | Owner’s Amount Interior Maintenance $/NRA SF or Owner’s Amount Interior Maintenance Gross SF | * Numeric | * Read only * If Net Rentable Area > 0, calculated as Owner’s Amount / Net Rentable Area and titled it as “$/NRA SF”. * If Net Rentable Area is unknown or 0 and Gross Sq Ft > 0, calculated as Owner’s Amount / Gross Sq Ft and titled it as “$/Gross SF”. |
| FR-3393-11 | Owner’s Amount Roof Maintenance | * Numeric * Max Length:15 | * Textbox * Conditionally editable |
| FR-3393-12 | Owner’s Amount Roof Maintenance $/NRA SF or Owner’s Amount  Roof Maintenance $/Gross SF | * Numeric | * Read only * If Net Rentable Area > 0, calculated as Owner’s Amount / Net Rentable Area and titled it as “$/NRA SF”. * If Net Rentable Area is unknown or 0 and Gross Sq Ft > 0, calculated as Owner’s Amount / Gross Sq Ft and titled it as “$/Gross SF”. |
| FR-3393-13 | Owner’s Amount Ground Maintenance | * Numeric * Max Length:15 | * Textbox * Conditionally editable |
| FR-3393-14 | Owner’s Amount  Ground Maintenance $/NRA SF or Owner’s Amount  Ground Maintenance $/ Gross SF | * Numeric | * Read only * If Net Rentable Area > 0, calculated as Owner’s Amount / Net Rentable Area and titled it as “$/NRA SF”. * If Net Rentable Area is unknown or 0 and Gross Sq Ft > 0, calculated as Owner’s Amount / Gross Sq Ft and titled it as “$/Gross SF”. |
| FR-3393-15 | Owner’s Amount Security | * Numeric * Max Length:15 | * Textbox * Conditionally editable |
| FR-3393-16 | Owner’s Amount Security $/NRA SF or Owner’s Amount Security $/Gross SF | * Numeric | * Read only * If Net Rentable Area > 0, calculated as Owner’s Amount / Net Rentable Area and titled it as “$/NRA SF”. * If Net Rentable Area is unknown or 0 and Gross Sq Ft > 0, calculated as Owner’s Amount / Gross Sq Ft and titled it as “$/Gross SF”. |
| FR-3393-17 | Owner’s Amount Janitorial | * Numeric * Max Length:15 | * Textbox * Conditionally editable |
| FR-3393-18 | Owner’s Amount Janitorial $/NRA SF or Owner’s Amount Janitorial $ /Gross SF | * Numeric | * Read only * If Net Rentable Area > 0, calculated as Owner’s Amount / Net Rentable Area and titled it as “$/NRA SF”. * If Net Rentable Area is unknown or 0 and Gross Sq Ft > 0, calculated as Owner’s Amount / Gross Sq Ft and titled it as “$/Gross SF”. |
| FR-3393-19 | Owner’s Amount Repairs | * Numeric * Max Length:15 | * Textbox * Conditionally editable |
| FR-3393-20 | Owner’s Amount Repairs $/NRA SF or Owner’s Amount Repairs $/Gross SF | * Numeric | * Read only * If Net Rentable Area > 0, calculated as Owner’s Amount / Net Rentable Area and titled it as “$/NRA SF”. * If Net Rentable Area is unknown or 0 and Gross Sq Ft > 0, calculated as Owner’s Amount / Gross Sq Ft and titled it as “$/Gross SF”. |
| FR-3393-21 | Owner’s Amount Common Area | * Numeric * Max Length:15 | * Textbox * Conditionally editable |
| FR-3393-22 | Owner’s Amount Common Area $/NRA SF or Owner’s Amount Common Area $/Gross SF | * Numeric | * Read only * If Net Rentable Area > 0, calculated as Owner’s Amount / Net Rentable Area and titled it as “$/NRA SF”. * If Net Rentable Area is unknown or 0 and Gross Sq Ft > 0, calculated as Owner’s Amount / Gross Sq Ft and titled it as “$/Gross SF”. |
| FR-3393-23 | Owner’s Amount Utilities | * Numeric * Max Length:15 | * Textbox * Conditionally editable |
| FR-3393-24 | Owner’s Amount Utilities $/NRA SF or Owner’s Amount Utilities $/Gross SF | * Numeric | * Read only * If Net Rentable Area > 0, calculated as Owner’s Amount / Net Rentable Area and titled it as “$/NRA SF”. * If Net Rentable Area is unknown or 0 and Gross Sq Ft > 0, calculated as Owner’s Amount / Gross Sq Ft and titled it as “$/Gross SF”. |
| FR-3393-25 | Owner’s amount Blank Textbox for sale expense | * Alphanumeric * Max length:23 | * Textbox * Conditionally editable |
| FR-3393-26 | Owner’s Amount blank Textbox for sale expense $/NRA SF or Owner’s Amount blank textbox for Sale expense | * Numeric | * Read only * If Net Rentable Area > 0, calculated as Owner’s Amount / Net Rentable Area and titled it as “$/NRA SF”. * If Net Rentable Area is unknown or 0 and Gross Sq Ft > 0, calculated as Owner’s Amount / Gross Sq Ft and titled it as “$/Gross SF”. |
| FR-3393-26 | Owner’s Amount Subtotals | * Calculation | * Calculation: Sum of all the Owner’s Amount fields from Management to Utilities |
| FR-3393-27 | Owner’s Amount Subtotals $/NRA SF or Owner’s Amount Subtotals $/Gross SF | * Numeric | * Read only * If Net Rentable Area > 0, calculated as Owner’s Amount / Net Rentable Area and titled it as “$/NRA SF”. * If Net Rentable Area is unknown or 0 and Gross Sq Ft > 0, calculated as Owner’s Amount / Gross Sq Ft and titled it as “$/Gross SF”. |
| FR-3393-28 | Owner’s Amount Real Estate Taxes | * Numeric * Max Length:15 | * Textbox * Conditionally editable |
| FR-3393-29 | Owner’s Amount Real Estate Taxes $/NRA SF or Owner’s Amount Real Estate Taxes 4/Gross SF | * Numeric | * Read only * If Net Rentable Area > 0, calculated as Owner’s Amount / Net Rentable Area and titled it as “$/NRA SF”. * If Net Rentable Area is unknown or 0 and Gross Sq Ft > 0, calculated as Owner’s Amount / Gross Sq Ft and titled it as “$/Gross SF”. |
| FR-3393-30 | Tenant’s Amount  Management | * Numeric * Max length: 15 | * Textbox * Conditionally editable |
| FR-3393-31 | Tenant’s Amount Management $/NRA SF or Tenant’s Amount Management $/Gross SF | * Numeric | * Read only * If Net Rentable Area > 0, calculated as Tenant’s Amount / Net Rentable Area and titled it as “$/NRA SF”. * If Net Rentable Area is unknown or 0 and Gross Sq Ft > 0, calculated as Tenant’s Amount / Gross Sq Ft and titled it as “$/Gross SF”. |
| FR-3393-32 | Tenant’s Amount Insurance | * Numeric * Max length: 15 | * Textbox * Conditionally editable |
| FR-3393-33 | Tenant’s Amount Insurance $/NRA SF or Tenant’s Amount Insurance $/Gross SF | * Numeric | * Read only * If Net Rentable Area > 0, calculated as Tenant’s Amount / Net Rentable Area and titled it as “$/NRA SF”. * If Net Rentable Area is unknown or 0 and Gross Sq Ft > 0, calculated as Tenant’s Amount / Gross Sq Ft and titled it as “$/Gross SF”. |
| FR-3393-34 | Tenant’s Amount Legal/Accounting | * Numeric * Max Length:15 | * Textbox * Conditionally editable |
| FR-3393-35 | Tenant’s Amount Legal/Accounting $/NRA SF or Tenant’s Amount Legal/Accounting $/ Gross SF | * Numeric | * Read only * If Net Rentable Area > 0, calculated as Tenant’s Amount / Net Rentable Area and titled it as “$/NRA SF”. * If Net Rentable Area is unknown or 0 and Gross Sq Ft > 0, calculated as Tenant’s Amount / Gross Sq Ft and titled it as “$/Gross SF”. |
| FR-3393-36 | Tenant’s Amount Exterior Maintenance | * Numeric * Max Length:15 | * Textbox * Conditionally editable |
| FR-3393-37 | Tenant’s Amount Exterior Maintenance $/NRA SF or Tenant’s Amount Exterior Maintenance $/Gross SF | * Numeric | * Read only * If Net Rentable Area > 0, calculated as Tenant’s Amount / Net Rentable Area and titled it as “$/NRA SF”. * If Net Rentable Area is unknown or 0 and Gross Sq Ft > 0, calculated as Tenant’s Amount / Gross Sq Ft and titled it as “$/Gross SF”. |
| FR-3393-38 | Tenant’s Amount Interior Maintenance | * Numeric * Max Length:15 | * Textbox * Conditionally editable |
| FR-3393-39 | Tenant’s Amount Interior Maintenance $/NRA SF or Tenant’s Amount Interior Maintenance Gross SF | * Numeric | * Read only * If Net Rentable Area > 0, calculated as Tenant’s Amount / Net Rentable Area and titled it as “$/NRA SF”. * If Net Rentable Area is unknown or 0 and Gross Sq Ft > 0, calculated as Tenant’s Amount / Gross Sq Ft and titled it as “$/Gross SF”. |
| FR-3393-40 | Tenant’s Amount Roof Maintenance | * Numeric * Max Length:15 | * Textbox * Conditionally editable |
| FR-3393-41 | Tenant’s Amount Roof Maintenance $/NRA SF or Tenant’s Amount  Roof Maintenance $/Gross SF | * Numeric | * Read only * If Net Rentable Area > 0, calculated as Tenant’s Amount / Net Rentable Area and titled it as “$/NRA SF”. * If Net Rentable Area is unknown or 0 and Gross Sq Ft > 0, calculated as Tenant’s Amount / Gross Sq Ft and titled it as “$/Gross SF”. |
| FR-3393-42 | Tenant’s Amount Ground Maintenance | * Numeric * Max Length:15 | * Textbox * Conditionally editable |
| FR-3393-43 | Tenant’s Amount  Ground Maintenance $/NRA SF or Tenant’s Amount  Ground Maintenance $/ Gross SF | * Numeric | * Read only * If Net Rentable Area > 0, calculated as Tenant’s Amount / Net Rentable Area and titled it as “$/NRA SF”. * If Net Rentable Area is unknown or 0 and Gross Sq Ft > 0, calculated as Tenant’s Amount / Gross Sq Ft and titled it as “$/Gross SF”. |
| FR-3393-44 | Tenant’s Amount Security | * Numeric * Max Length:15 | * Textbox * Conditionally editable |
| FR-3393-45 | Tenant’s Amount Security $/NRA SF or Tenant’s Amount Security $/Gross SF | * Numeric | * Read only * If Net Rentable Area > 0, calculated as Tenant’s Amount / Net Rentable Area and titled it as “$/NRA SF”. * If Net Rentable Area is unknown or 0 and Gross Sq Ft > 0, calculated as Tenant’s Amount / Gross Sq Ft and titled it as “$/Gross SF”. |
| FR-3393-46 | Tenant’s Amount Janitorial | * Numeric * Max Length:15 | * Textbox * Conditionally editable |
| FR-3393-47 | Tenant’s Amount Janitorial $/NRA SF or Tenant’s Amount Janitorial $ /Gross SF | * Numeric | * Read only * If Net Rentable Area > 0, calculated as Tenant’s Amount / Net Rentable Area and titled it as “$/NRA SF”. * If Net Rentable Area is unknown or 0 and Gross Sq Ft > 0, calculated as Tenant’s Amount / Gross Sq Ft and titled it as “$/Gross SF”. |
| FR-3393-48 | Tenant’s Amount Repairs | * Numeric * Max Length:15 | * Textbox * Conditionally editable |
| FR-3393-49 | Tenant’s Amount Repairs $/NRA SF or Tenant’s Amount Repairs $/Gross SF | * Numeric | * Read only * If Net Rentable Area > 0, calculated as Tenant’s Amount / Net Rentable Area and titled it as “$/NRA SF”. * If Net Rentable Area is unknown or 0 and Gross Sq Ft > 0, calculated as Tenant’s Amount / Gross Sq Ft and titled it as “$/Gross SF”. |
| FR-3393-50 | Tenant’s Amount Common Area | * Numeric * Max Length:15 | * Textbox * Conditionally editable |
| FR-3393-51 | Tenant’s Amount Common Area $/NRA SF or Tenant’s Amount Common Area $/Gross SF | * Numeric | * Read only * If Net Rentable Area > 0, calculated as Tenant’s Amount / Net Rentable Area and titled it as “$/NRA SF”. * If Net Rentable Area is unknown or 0 and Gross Sq Ft > 0, calculated as Tenant’s Amount / Gross Sq Ft and titled it as “$/Gross SF”. |
| FR-3393-52 | Tenant’s Amount Utilities | * Numeric * Max Length:15 | * Textbox * Conditionally editable |
| FR-3393-53 | Tenant’s Amount Utilities $/NRA SF or Tenant’s Amount Utilities $/Gross SF | * Numeric | * Read only * If Net Rentable Area > 0, calculated as Tenant’s Amount / Net Rentable Area and titled it as “$/NRA SF”. * If Net Rentable Area is unknown or 0 and Gross Sq Ft > 0, calculated as Tenant’s Amount / Gross Sq Ft and titled it as “$/Gross SF”. |
| FR-3393-54 | Tenant’s amount Blank Textbox for sale expense | * Alphanumeric * Max length:23 | * Textbox * Conditionally editable |
| FR-3393-55 | Tenant’s Amount blank Textbox for sale expense $/NRA SF or Tenant’s Amount blank textbox for Sale expense | * Numeric | * Read only * If Net Rentable Area > 0, calculated as Tenant’s Amount / Net Rentable Area and titled it as “$/NRA SF”. * If Net Rentable Area is unknown or 0 and Gross Sq Ft > 0, calculated as Tenant’s Amount / Gross Sq Ft and titled it as “$/Gross SF”. |
| FR-3393-56 | Tenant’s Amount Subtotals | * Calculation | * Calculation: Sum of all the Owner’s Amount fields from Management to Utilities |
| FR-3393-57 | Tenant’s Amount Subtotals $/NRA SF or Tenant’s Amount Subtotals $/Gross SF | * Numeric | * Read only * If Net Rentable Area > 0, calculated as Tenant’s Amount / Net Rentable Area and titled it as “$/NRA SF”. * If Net Rentable Area is unknown or 0 and Gross Sq Ft > 0, calculated as Tenant’s Amount / Gross Sq Ft and titled it as “$/Gross SF”. |
| FR-3393-58 | Tenant’s Amount Real Estate Taxes | * Numeric * Max Length:15 | * Textbox * Conditionally editable |
| FR-3393-59 | Tenant’s Amount Real Estate Taxes $/NRA SF or Tenant’s Amount Real Estate Taxes $/Gross SF | * Numeric | * Read only * If Net Rentable Area > 0, calculated as Tenant’s Amount / Net Rentable Area and titled it as “$/NRA SF”. * If Net Rentable Area is unknown or 0 and Gross Sq Ft > 0, calculated as Tenant’s Amount / Gross Sq Ft and titled it as “$/Gross SF”. |
| FR-3393-60 | Owner’s Amount Totals | * Numeric | * Formula: Sum of Owner’s Amount Management through Real Estate Taxes |
| FR-3393-61 | Owner’s Amount Totals $/NRA SF or Owner’s Amount Totals $/Gross SF | * Numeric | * Read only * If Net Rentable Area > 0, calculated as Owner’s Amount / Net Rentable Area and titled it as “$/NRA SF”. * If Net Rentable Area is unknown or 0 and Gross Sq Ft > 0, calculated as Owner’s Amount / Gross Sq Ft and titled it as “$/Gross SF”. |
| FR-3393-62 | Tenant’s Amount Totals | * Numeric | * Formula: Sum of Tenant’s Amount Management through Real Estate Taxes |
| FR-3393-63 | Tenant’s Amount Totals $/NRA SF or Tenant’s Amount Totals $/Gross SF | * Numeric | * Read only * If Net Rentable Area > 0, calculated as Tenant’s Amount / Net Rentable Area and titled it as “$/NRA SF”. * If Net Rentable Area is unknown or 0 and Gross Sq Ft > 0, calculated as Tenant’s Amount / Gross Sq Ft and titled it as “$/Gross SF”. |
| FR-3393-64 | Total Expense | * Numeric | * Calculation: Owner’s Amount Totals (a) + Tenant’s Amount Totals (b) = Total Expense |
| FR-3393-65 | Total Expense $/NRA or Total Expense $/Gross SF | * Numeric | * Read only * If Net Rentable Area > 0, calculated as Tenant’s Amount / Net Rentable Area and titled it as “$/NRA SF”. * If Net Rentable Area is unknown or 0 and Gross Sq Ft > 0, calculated as Tenant’s Amount / Gross Sq Ft and titled it as “$/Gross SF”. |

#### Expenses Tab Calculation

**Expenses:**

1. Owner’s Amount and Tenant’s Amount are whole dollar amount.
2. Round the numerical value 34.246 to 34.25. If 34 pad with 2 zero after the decimal point. So, 34 becomes 34.00.

Use the total SF from the Income tab. If not available, use Gross SF.

1. $/SF (Owner’s)
2. if Net Rentable Area > 0, calculated as Owner’s Amount / Net Rentable Area and titled it as “$/NRA SF”.
3. if Net Rentable Area is unknown or 0 and Gross Sq Ft > 0, calculated as Owner’s Amount / Gross Sq Ft and titled it as “$/Gross SF”.
4. $/SF (Tenant’s)
5. if Net Rentable Area > 0, calculated as Tenant’s Amount / Net Rentable Area and titled it as “$/NRA SF”.
6. if Net Rentable Area is unknown or 0 and Gross Sq Ft > 0, calculated as Tenant’s Amount / Gross Sq Ft and titled it as “$/Gross SF”.

$/Gross SF

Graphical user interface, application, Word

Description automatically generated

$/NRA SF (Income tab Total Sq Ft is 1,434) (Formula: Owner’s Amount/Total SF = $/NRA SF)

Table

Description automatically generated

Graphical user interface, application

Description automatically generated

#### Save – Click – Action

| **FR #** | **Field** | **Format / Event** | **Requirement** |
| --- | --- | --- | --- |
| FR-3333-01 | Save | Click | * Perform Data Validations * If errors   + Display error message   + Do not save * If no errors proceed to next FR * If no errors update the database with the input value |
| FR-3333-02 | Save | Click (Update DB) | * Update the database: * Form fields from the UI are saved to the database. * See the UI fields to database field mapping in the section [Expenses Fields](#_Expenses_Fields) |

#### Save - Click - Data Validation

| **FR #** | **Field** | **Format / Event** | **Requirement** |
| --- | --- | --- | --- |
| FR-3395-01 | Save | Click (Owner’s Amount and Tenant’s Amount = required whole dollar number) | * The amount entered in the fields must be a whole dollar number between 0 and 999,999,999,999. * If a whole dollar number is not entered in Expenses tab fields, then, * Display an error message, An expense must be a whole number greater than 0 and not more than 12 digits (Must\_Be\_GreaterThan\_Digits) |

### Adjustments Tab

Graphical user interface

Description automatically generated

#### Adjustments Tab - Click – Action

| **FR #** | **Field** | **Format / Event** | **Requirement** |
| --- | --- | --- | --- |
| FR-3310-01 | Adjustments Tab | Click | * When Adjustments Tab is clicked the system will get the Adjustements tab data and populate it into the form. * **Adjustments** **Tab** = [Get Adjustment Tab](#_Get_Adjustments_Tab) Data passing (CSA\_ID) * Populate the **Sale Info Tab data** into the Sale Info Tab * For technical details, refer to section [Adjustments fields](#_Adjustments) |

#### Adjustments Tab Fields

For technical details, refer to section [Adjustment Fields](#_Adjustments)

| **FR #** | **Field** | **Format / Event** | **Requirement** |
| --- | --- | --- | --- |
| FR-3310-01 | Down | * Numeric * Max Length: 30 or 15 | * Textbox * Down |
| FR-3310-02 | 1st | * Numeric * Max length: 30 | * Textbox * 1st |
| FR-3310-03 | Others | * Numeric * Max length: 30 | * Textbox * Others |
| FR-3310-04 | Ind Pur Price | * Numeric * Max length: 30 | * Populate if applicable. |
| FR-3310-05 | Total (a thru d) | * Calculation | * Formula: Total (a thru d) = Down (a) + 1st (b) + 2nd (c) + Others (d) |
| FR-3310-06 | CE Adjustments | * Numeric * Max length: 30 | * CE Adjustments * Textbox |
| FR-3310-07 | Bonds | * Numeric * Max length: 30 | * Textbox * Bonds |
| FR-3310-08 | Business Property | * Numeric * Max Length: 30 | * Textbox * Business Property |
| FR-3310-09 | Other Adjustments | * Numeric * Max Length: 30 | * Textbox * Other Adjustments |
| FR-3310-10 | Adj Sales price | * Numeric | * Populate if applicable |
| FR-3310-11 | Total (e thru h) | * Calculation | * Formula: Ind Pur Price (e) + CE Adjustments (f) + Business Property (g) + Other Adjustments (h) |

#### Save – Click – Action

| **FR #** | **Field** | **Format / Event** | **Requirement** |
| --- | --- | --- | --- |
| FR-33103-01 | Save | Click | * Perform Data Validations * If errors   + Display error message   + Do not save * If no errors proceed to next FR * If no errors update the database with the input values from the form |
| FR-333103-02 | Save | Click (Update DB) | * Update the database: * Form fields from the UI are saved to the database. * See the UI fields to database field mapping in the section [Adjustment Fields](#_Adjustments) |

#### Save – Click – Validation

| **FR #** | **Field** | **Format / Event** | **Requirement** |
| --- | --- | --- | --- |
| FR-33104-01 | Save | Click – Adjustment Tab Fields = whole number | * The amount entered in the Adjustment Tab fields must be a whole number between -999,999,999,999 and 999,999,999,999. * If a whole number is not entered in Adjustment tab fields, then, * Display an error message: An adjustment must be a whole number between -999,999,999,999 and 999,999,999,999. |
| FR-33104-02 | Save | Click – Down = positive value | * The amount entered in Down field must be a positive number. * If a negative number is not entered in Down field, then, * Display an error message: The down payment cannot be negative. |
| FR-33104-03 | Save | Click – 1st = positive value | * The amount entered in the 1st field must be a positive number. * If a negative number is not entered in 1st field, then, * Display an error message: 1st mortgage cannot be negative. |
| FR-33104-04 | Save | Click – 2nd = positive value | * The amount entered in the 2nd field must be a positive number. * If a negative number is not entered in 2nd field, then, * Display an error message: “2nd mortgage cannot be negative. “ |

### Income Analysis & Value Ind Tab

Graphical user interface, application

Description automatically generated

#### Income and Analysis & Value Ind Tab– Click – Action

| **FR #** | **Field** | **Format / Event** | **Requirement** |
| --- | --- | --- | --- |
| FR-33111-01 | Income and Analysis & Value Ind tab | Click | * When Income and Analysis & Value Ind tab Tab is clicked the system will get the Income and Analysis & Value Ind tab data and populate it into the form. * **Analysis & Value Ind** **data** = Get [Income and Analysis & Value Ind Tab](#_Get_Income_and) Data passing (CSA\_ID) * Populate the **Sale Info Tab data** into the Sale Info Tab * For technical details, refer to section [Income and Analysis & Value Ind Fields](#_Income_Analysis_&) |

#### Income and Analysis & Value Ind Fields

For technical details, refer to section [Income and Analysis & Value Ind Fields](#_Income_Analysis_&)

| **FR #** | **Field** | **Format / Event** | **Requirement** |
| --- | --- | --- | --- |
| FR-33112-01 | Potential Gross Income | * Numeric | * Read only * Formula: Total Rent Current and Anticipated from Income tab\*12 * The number format should include commas to separate every three digits |
| FR-33112-02 | Vacancy and Coll Loss | * Numeric | * Read only * Formula: PGI\* PGI%/100 * E.g.: PGI is 19,608 and the entered PGI% is 2.00, then Vacancy and Coll Loss is calculated as (19,608\*2.00/100 = 392.16), rounded off to 392 * Round off to the nearest whole dollar amount |
| FR-33112-03 | Additional Net Income | * Numeric * Max length: 12 | * Textbox * Whole dollar amount and must be > 0 if entered |
| FR-33112-04 | Tenant Expense Reimbursement | * Numeric * Max length:12 | * Textbox * Whole dollar amount and must be > 0 if entered. |
| FR-33112-05 | Effective Gross Income | * Numeric | * Read only * Formula: Effective Gross Income = PGI (Potential Gross Income) – Vacancy Coll Loss + Additional New Income + Tenant Expense Reimbursement * E.g.: PGI is 19,608, Vacancy and Coll Loss is 392, Additional Net Income is 10 and Tenant Expense Reimbursement is 10. Formula: 19,608-392+10+10 = 19,236 |
| FR-33112-06 | Owner's Expenses | * Numeric * Max length: | * Read only * Formula: Owner’s Expenses= Owner’s Amount Subtotals from Expenses |
| FR-33112-07 | Anticipated Property Taxes | * Numeric * Max length:12 | * Textbox * Anticipated Property Taxes |
| FR-33112-08 | Other Tax – No label | * Numeric * Max length:12 | * Textbox |
| FR-33112-09 | Net Operating Income | * Numeric | * Read only * Formula: Net Operating Income = Effective Gross Income (EGI) – Owner’s Expenses- Anticipated Property Taxes – Other taxes (blank) * E.g.: EGI is 19,236, Anticipated Property Taxes is 1,000, Owner’s Expenses is 2200 Other taxes is 1000. Formula: 19,236 - 1000 -2200 -1000 = 15,036 |
| FR-33112-10 | Adj Sale Price | * Numeric | * Read only * Formula: Total (e thru h) from Adjustments tab |
| FR-33112-11 | PGI % | * Numeric | * Text box * When user enters this value as 2, it represents 2% * System displays the value with 2 decimals (2.00) |
| FR-33112-12 | EGI % | * Numeric | * Read only * Formula: owners\_expenses\_total see: [GetExpensesOwner’sTotal](#_IE_GET_CSA_EXPENSE_TOTAL) / (PGIwork (Total rent\*12) - cmp\_vac\_coll\_loss (PGI work\* PGI/100) + addition\_net\_income + tenant\_reimburse) * E.g.: PGI work (1,634\*12) =19,608, cmp\_vac\_coll\_loss (19,608\* 2/100) = 392.16, Additional Net Income = 10, Tenant Reimbursement = 10, Owner’s expenses = 200 * EGI% = 200/412.16 * System displays the value with 2 decimals |
| FR-33112-13 | Tax Rate | * Numeric | * [Get Tax Rate](#_SP:_IE_GET_CSA_TAX_RATE_passing) passing in Property ID and Roll Year * The system displays the value with two decimal points. If there are fewer than two digits, the system pads with a 0. |
| FR-33112-14 | NOI/Adj. Sale Price (%) | * Numeric | * Formula: NOI/Adj Sale Price\*100 * E.g.: NOI is 17,136/4\*100 = 428400.00 * System displays the value with 2 decimals * Read only |
| FR-33112-15 | Adj. Sale Price/PGI | * Numeric | * Read only * Formula: Adj Sale Price/PGI * System displays the value with 1 decimal. * Read only |
| FR-33112-16 | Adj. Sale price/NRA or Adj. Sale Price/ Gross SF | * Numeric | * Formula: Adj Sale Price/ NRA or Adj Sale Price/Gross SF * If Net Rentable Area > 0 calculate Adj Sale Price/NRA and display field label as Adj. Sale price/NRA * If Net Rentable Area is unknown or 0 and Gross Sq Ft > 0 calculate Adj Sale Price/Gross Sf and display field label as Adj. Sale Price/ Gross SF * The system displays the value with a dollar sign and cents rounded to two decimal points. * Read only |
| FR-33112-17 | Rent(PGI)/NRA/Yr or Rent (PGI) Gross SF/Yr | * Numeric | * Formula: Rent(PGI)/NRA or Rent(PGI)/Gross SF * If Net Rentable Area > 0 calculate Rent(PGI)/NRA and display field label as Rent(PGI)/NRA Yr * If Net Rentable Area is unknown or 0 calculate Rent(PGI)/Gross SF and display field label as Rent(PGI)/Gross SF * Read only * The system displays the value with a dollar sign and cents rounded to two decimal points. |
| FR-33112-18 | NOI/NRA/Yr or NOI/ Gross SF/Yr | * Numeric | * Formula: NOI/NRA or NOI/Gross SF * If Net Rentable Area > 0 calculate NOI/NRA and display field label as NOI/NRA/Yr * If Net Rentable Area is unknown or 0 calculate NOI/Gross SF and display field label as NOI/ Gross SF/Yr * Read only * The system displays the value with a dollar sign and cents rounded to two decimal points. |
| FR-33112-19 | Owners Expenses/NRA/Yr or Owners Expenses/Gross SF Yr | * Numeric | * Formula: Owner’s Expenses/NRA or Owner’s Expenses/Gross sq Ft * If Net Rentable Area > 0 calculate Owner’s Expenses/NRA and display field label as Owners Expenses/NRA/Yr * If Net Rentable Area is unknown or 0 calculate Owner’s Expenses/Gross SF and display field label as Owners Expenses/Gross SF Yr * Read only * The system displays the value with a dollar sign and cents rounded to two decimal points. |
| FR-33112-20 | Total Expenses/NRA/Yr or Total expense/Gross SF/Yr | * Numeric | * Formula: Total Expenses (a+b) in Expense page/NRA or Total Expenses (a+b) in Expense page/ Gross SF * If Net Rentable Area > 0 calculate as Total Expenses (column (a+b) in Expenses page) divided by NRA and display field label as Total Expenses/NRA/Yr * If Net Rentable Area is unknown or 0 calculate Total Expenses (column (a+b) in Expenses page) /Gross SF and display field label as Total Expenses/Gross SF Yr * Read only * The system displays the value with a dollar sign and cents rounded to two decimal points. |
| FR-33112-21 | Min % Occupancy | * Numeric * Max length: 3 | * Textbox * Whole dollar amount and must be > 0 if entered. |
| FR-33112-22 | % Occupancy | * Numeric * Max length: 3 | * IE\_CSA\_INCOME\_ANALYSIS. PCT\_OCCUPANCY * Pulling from DB * Read only |
| FR-33112-23 | Property NRA | * Numeric * Max length: 4 | * IE\_CSA\_ANALYSIS. CSA\_NET\_RENT\_AREA * Pulling from DB * Read only |
| FR-33112-24 | Benchmark Rating | * Alphanumeric * Upshifted * Max length: 50 | * Benchmark Rating * Drop Down * See values [Benchmark Rating Drop Down](#_Benchmark_Rating_Drop) * Default selection is blank |
| FR-33112-25 | OAR | * N/A | * OAR default is No * OAR is No if Full\_expenses\_fl is Y and PGI =>0 * OAR is Yes if Full\_expenses\_fl is Y, PGI=>0 and pct\_occupancy value => min\_occupancy\_value * Read only |
| FR-33112-26 | OAR | * N/A | * Label read-only |
| FR-33112-27 | GIM | * N/A | * Label read-only |
| FR-33112-28 | MA/S.F. | * N/A | * Label read-only |

#### Income and Analysis & Value Ind Calculation

APN: 38-3182-4

Graphical user interface, application, table

Description automatically generated

Potential Gross Income = Total Rent Current and Anticipated (1634 \* 12) = 19,608

Graphical user interface

Description automatically generated

#### Save – Click – Action

| **FR #** | **Field** | **Format / Event** | **Requirement** |
| --- | --- | --- | --- |
| FR-33114-01 | Save | Click | * Perform Data Validations * If errors   + Display error message   + Do not save * If no errors proceed to next FR * If no errors update the database with the input values from the form |
| FR-33114-02 | Save | Click (Update DB) | * Update the database: * Form fields from the UI are saved to the database. * See the UI fields to database field mapping in the section [Income and Analysis & Value Ind Fields](#_Income_Analysis_&) |

#### Save - Click - Data Validations

| **FR #** | **Field** | **Format / Event** | **Requirement** |
| --- | --- | --- | --- |
| FR-33115-01 | Save | Click (Income and Analysis & Value Ind) | * When value entered in the Additional Net Income text box contains alphabetic characters or invalid numerical value, then,   + Display an error message, “Additional Net Income must be a whole number between 1 and 999,999,999,999.” |
| FR-33115-02 | Save | Click | * When value entered in the Tenant Expense reimbursement text box contains alphabetic characters or invalid numerical value, then,   + Display an error message, “Tenant Expense reimbursement must be a whole number between 1 and 999,999,999,999.” |
| FR-33115-03 | Save | Click | * When value entered in the Anticipated property Taxes text box contains alphabetic characters or invalid numerical value, then,   + Display an error message, “Anticipated property Taxes must be a whole number between 1 and 999,999,999,999.” |
| FR-33115-04 | Save | Click | * When value entered in Min % Occupancy text box contains alphabetic characters or invalid numerical value, then,   + Display an error message, “Min % Occupancy must be a whole number between 1 and 999,999,999,999.” |

### Sources Tab

Graphical user interface, application

Description automatically generated

#### Click – Action

| **FR #** | **Field** | **Format / Event** | **Requirement** |
| --- | --- | --- | --- |
| FR-33121-01 | Sources Tab | Click | * When Sources Tab is clicked the system will get the Sources tab data and populate it into the form. * **Sources Tab data** = [Get Sources Tab](#_Sources) Data passing (CSA\_ID) * Populate the **Sources Tab data** into the Sources Tab * For technical details, refer to section [Sources fields](#_Sources_Fields) |

#### Sources Tab Fields

For technical details, refer to section [Sources Fields](#_Sources_Fields)

| ***FR #*** | ***Field*** | ***Format / Event*** | ***Requirement*** |
| --- | --- | --- | --- |
| FR-33122-01 | (Source) Primary | * Alphanumeric * Upshifted * Max length:2 | * Primary * Drop Down * Required * Value: see [Primary drop down](#_Primary_Source_Drop) * Default selection is blank |
| FR-33122-02 | Name | * Alphanumeric * Max Length: 50 | * Text Box * Name |
| FR-33122-03 | Title | * Alphanumeric * Max Length:30 | * Text box * Title |
| FR-33122-04 | Company | * Alphanumeric * Max Length:50 | * Text Box * Company |
| FR-33122-05 | Email | * Alphanumeric * Max Length:30 | * Text Box * Email |
| FR-33122-06 | Phone | * Numeric * Max Length:10 | * Text Box * Phone |
| FR-33122-07 | Ext | * Numeric * Max Length:4 | * Text Box * Ext |
| FR-33122-08 | Alternate Phone | * Numeric * Max Length:10 | * Text Box * Alternate Phone |
| FR-33122-09 | Ext | * Numeric * Max Length:4 | * Text Box * Ext |
| FR-33122-10 | Secondary | * Alphanumeric * Upshifted * Max length:2 | * Secondary * Drop Down * Required * Value: see [Secondary drop down](#_Secondary_Source_Drop) * Default selection is blank |
| FR-33122-11 | Name | * Alphanumeric * Max Length: 50 | * Text Box * Name |
| FR-33122-12 | Title | * Alphanumeric * Max Length:30 | * Text box * Title |
| FR-33122-13 | Company | * Alphanumeric * Max Length:50 | * Text Box * Company |
| FR-33122-14 | Email | * Alphanumeric * Max Length:30 | * Text Box * Email |
| FR-33122-15 | Phone | * Numeric * Max Length:10 | * Text Box * Phone |
| FR-33122-16 | Ext | * Numeric * Max Length:4 | * Text Box * Ext |
| FR-33122-17 | Alternate Phone | * Numeric * Max Length:10 | * Text Box * Alternate Phone |
| FR-33122-18 | Ext | * Numeric * Max Length:4 | * Text Box * Ext |
|  | Label - Additional Sources of Information | * Label |  |
| FR-33122-19 | IQ | * Check box | * IQ * Check box * Default unchecked |
| FR-33122-20 | AAB | * Check box | * AAB * Check box * Default unchecked |
| FR-33122-21 | PCOR/COS | * Check box | * PCOR/COS * Check box * Default unchecked |
| FR-33122-22 | RFR | * Check box | * RFR * Check box * Default unchecked |
| FR-33122-23 | Other | * Alphanumeric * Max Length: 30 | * Other * Text box |
|  | Source History Label | * Label |  |
| FR-33122-23 | Created By | * Alphanumeric * Upshifted | * Worker   + Current logged in Worker Last Name, First Name <space> Middle Name   + Format: [Worker Last name comma then first, middle](#_Worker_Last_name) * [Get Worker](#_Worker_Name) |
| FR-33122-23 | Created Date | * Numeric * Max length:10 | * Calendar * Format: MM/DD/YYYY |
| FR-33122-23 | Modified By | * Alphanumeric * Max Length: 8 | * Worker   + Current logged in Worker Last Name, First Name <space> Middle Name   + Format: [Worker Last name comma then first, middle](#_Worker_Last_name) * Read only |
| FR-33122-23 | Modified Date | * Numeric * Max Length: 10 | * Read only * Format: MM/DD/YYYY |
| FR-33122-23 | Modify Reason | * Alphanumeric * Max Length: 2 | * Drop Down * Value: see [Modify Reason drop down](#_Modify_Reason_Drop) |
| FR-33122-23 | Supervisor Approved | * Alphanumeric * Max Length: | * Drop Down * Yes/No |
| FR-33122-23 | Suprv Update Date | * Alphanumeric * Max Length: 8 | * Read only * Format: MM/DD/YYYY |
| FR-33122-23 | Suprv Approval Update By | * Alphanumeric * Max Length: | * Worker   + Current logged in Worker Last Name, First Name <space> Middle Name   + Format: [Worker Last name comma then first, middle](#_Worker_Last_name) * Read only |

#### Save – Click – Action

| **FR #** | **Field** | **Format / Event** | **Requirement** |
| --- | --- | --- | --- |
| FR-33123-01 | Save | Click | * Perform Data Validations * If errors   + Display error message   + Do not save * If no errors proceed to next FR * If no errors update the database with the input values from the form |
| FR-33123-02 | Save | Click (Update DB) | * Update the database: * Form fields from the UI are saved to the database. * See the UI fields to database field mapping in the section [Sources Fields](#_Sources_Fields) |

#### Save- Click - Data Validation

| **FR #** | **Field** | **Format / Event** | **Requirement** |
| --- | --- | --- | --- |
| FR-33124-01 | Save | Click - Primary Source = selected not blank then Name or Company is required | * If Primary Source is selected, then Name or Company cannot be blank * If Primary Source is selected and both Name and Company fields are blank, then, display an error message:   + The Name or Company is required if Primary Source is entered. |
| FR-33124-02 | Save | Click (Primary Source fields = value then Primary Source selection is required | * If any of the Primary Source fields has a value, then a Primary drop-down selection is required. * If any Primary Source fields have a value and the Primary drop-down selection is blank, then display an error message:   + The Primary Source is required if primary details are entered. |
| FR-33124-03 | Save | Click (Primary Phone = not valid numeric) | * If Phone entered is not a valid US number, then, display an error message:   + The Primary Phone must be a valid 10-digit US phone number. |
| FR-33124-04 | Save | Click (Primary Source Ext = not null then phone number is required) | * If Ext is entered, then Phone number cannot be blank. * If Primary Source Ext is entered and Primary Source Phone number is blank, then, display an error message:   + Primary Phone is required if primary Extension is entered. |
| FR-33124-05 | Save | Click (Primary Alternate phone = not valid numeric) | * If Alternate Phone entered is not a valid US number, then, display an error message:   + The Primary Alternate Phone must be a valid 10 digit US phone number. |
| FR-33124-06 | Save | Click (Secondary Source = selected not blank then Name or Company is required | * If SecondarySource is selected, then Name or Company cannot be blank. * If SecondarySource is selected and both Name and Company fields are blank, then, display an error message:   + The Name or Company is required if Secondary Source is entered. |
| FR-33124-07 | Save | Click (Secondary Source fields = value then Primary Source selection is required | * If any of the Secondary Source fields has a value, then a Secondary drop-down selection is required. * If any Secondary Source fields have a value and the Secondary drop-down selection is blank, then, display an error message:   + The Secondary Source is required if primary details are entered. |
| FR-33124-08 | Save | Click (Secondary Phone = not valid numeric) | * If Phone entered is not a valid US number, then, display an error message:   + The Secondary Phone must be a valid 10-digit US phone number. |
| FR-33124-09 | Save | Click (Secondary Source Ext = not null then phone number is required) | * If Ext is entered, then Phone number cannot be blank. * If Secondary Source Ext is entered and Secondary Source Phone number is blank, then, display an error message:   + Secondary Phone is required if primary Extension is entered. |
| FR-33124-10 | Save | Click (Secondary Alternate phone = not valid numeric) | * If Secondary Phone entered is not a valid US number, then, display an error message:   + The Secondary Alternate Phone must be a valid 10 digit US phone number. |
| FR-33124-11 | Save | Click (Created Date) | * If the Created date picked is not the current date or a past date, then, display an error message:   + Created Date cannot be greater than today. |

#### Clear Input – Click – Action

| **FR #** | **Field** | **Format / Event** | **Requirement** |
| --- | --- | --- | --- |
| FR-33125-01 | Clear Input | Click (Sources Tab) | * Same as [Sources Tab - Click - Action](#_Click_–_Action) |

## Sales Analysis Report – Window

The toolbar “Sales Analysis Report” button is used to generate a printable version of the CSA.

### Default Display

| **FR #** | **Field** | **Format / Event** | **Requirement** |
| --- | --- | --- | --- |
| FR-341-01 | Modal Window | Default Display Opened from Toolbar Menu > Sales Analysis Report | * When the Sales Analysis Report button is clicked the system will get the CSA report and populate it into the Sales Analysis Report modal window. |
| FR-341-02 | Modal Window | Format | * Users should be able to import the report in Excel, PDF, and Word format * Users should be able to size the report * Pagination for ease of use |
| FR-341-02 | Report Title | Label | * Report Header is internal report standard; see [Reporting Framework FR](https://acgovt.sharepoint.com/sites/IMPROVENET/Requirements/Standards/Reporting%20Framework%20FR.docx?web=0) * Label: **<report name>** |
| FR-341-03 | Sales Info Data | Get | * When the Sales Analysis Report button is clicked the system will get the CSA report and populate it into the Sales Analysis Report modal. * Sales Analysis Report Data =   Get [Sale Info data](#_Get_Sale_Info)   * See [Sale Info Fields](#_Sale_Info_Fields) report field to data mapping in Report Columns/ Rows * Populate data into the report * Note: Details field and value is not shown on the report |
| FR-341-04 | Property Info | Get | * Sales Analysis Report Data =   Get [Property Info](#_Get_Property_Info_1)   * See [Property Info Fields](#_Get_Prop_Characteristics_1) report field to data mapping in Report Columns/ Rows * Populate data into the report |
| FR-341-05 | Income Expense Analysis | Get | * Sales Analysis Report Data =   Get [Income Expense Analysis](#_Get_Income_Expense)   * See [Expense Fields](#_Expenses_Fields) report field to data mapping in Report Columns/ Rows * Populate data into the report |
| FR-341-06 | Lease Info | Get | * Sales Analysis Report Data = Get [Lease Info](#_Get_Lease_Info_1) * See [Lease Info fields](#_Add_Lease_Fields) report field to data mapping in Report Columns/ Rows * Populate data into the report |
| FR-341-07 | CSA Expense | Get | * Sales Analysis Report Data = [Get CSA Expense](#_Get_CSA_Expense) * See report field to data mapping in Report Columns/ Rows * Populate data into the report |
| FR-341-08 | CSA Report Source | Get | * Sales Analysis Report Data = Get [CSA Source](#_Get_CSA_Sources) * See report field to data mapping in Report Columns/ Rows * Populate data into the report |
| FR-341-09 | CSA Rpt Adjustments | Get | * Sales Analysis Report Data =   Get [CSARptAdjustments](#_Get_Adjustments_–) |
| FR-341-10 | CSA Comments | Get | * Sales Analysis Report Data =   Get [CSA Comments](#_Comments_Tab)   * See report field to data mapping in Report Columns/ Rows * Populate data into the report |
| FR-341-11 | Mailing Name as of Date | Get | * Sales Analysis Report Data =   Get [Mailing Name as of Date](#_Get_Mailing_Name)   * See report field to data mapping in Report Columns/ Rows * Populate data into the report |
| FR-341-12 | All APN | Get | * Sales Analysis Report Data =   Get [ALL APN](#_Get_All_APN)   * See report field to data mapping in Report Columns/ Rows * Populate data into the report |
| FR-341-13 | Tax Rate | Get | * Sales Analysis Report Data = Get [Tax Rate](#_SP:_IE_GET_CSA_TAX_RATE_passing) * See report field to data mapping in Report Columns/ Rows * Populate data into the report |
| FR-341-14 | Report Footer | Report Footer | * Report Footer is secured report footer standard; see [Reporting Framework FR](https://acgovt.sharepoint.com/sites/IMPROVENET/Requirements/Standards/Reporting%20Framework%20FR.docx?web=0) |

### Report Columns/Rows – Sale Info

#### Screenshot

See the layout in the screenshot below

Text

Description automatically generated

### Report Columns/Rows – Property Characteristics

#### Screenshot

See the layout in the screenshot below

A screenshot of a computer

Description automatically generated with low confidence

### Report Columns/Rows- Adjustments

#### Screenshot

Table

Description automatically generated

### Report Columns/Rows – Income Analysis & Value Indicators

#### Screenshot

See the layout in the screenshot below

Table

Description automatically generated

### Report Columns/Rows – Sources

#### Screenshot

See the layout in the screenshot below

Graphical user interface, text, email

Description automatically generated

### Report Columns/Rows – Comments

#### Screenshot

See the layout in the screenshot below

Table

Description automatically generated with medium confidence

### Report Columns/Rows – Expenses

#### Screenshot

See the layout in the screenshot below

Table

Description automatically generated

### Report Columns/Rows- Income

#### Screenshot

See the layout in the screenshot below

Table

Description automatically generated

Table

Description automatically generated

### Close - Click – Action

| **FR #** | **Field** | **Format / Event** | **Requirement** |
| --- | --- | --- | --- |
| FR-33145-01 | Close | Click | * Close the modal |

## Modify Reason Modal Window

Graphical user interface, text, application, Word

Description automatically generated

#### Default Display

This modal allows a person to modify previously worked and approved CSA.

| **FR #** | **Field** | **Format / Event** | **Requirement** |
| --- | --- | --- | --- |
| FR-3511-01 | Modify Reason Drop-down | Open modal from “Edit CSA” button in toolbar | * Modify Reason is required field. * Get Modify Reason Drop down [Values](#_Modify_Reason_Drop) * Modify Reason drop down selection is blank by default. |
| FR-3511-02 | Save and Cancel | N/A | * Save and Cancel should be displayed underneath Modify Reason drop-down. * Follow the Improve standard |

#### Buttons

| **FR #** | **Field** | **Format / Event** | **Requirement** |
| --- | --- | --- | --- |
| FR-3512-01 | Save | N/A | * Enabled   + Always * Disabled   + Never |
| FR-3512-02 | Cancel | N/A | * Enabled   + Always * Disabled   + Never |

#### Save – Click – Action

| **FR #** | **Field** | **Format / Event** | **Requirement** |
| --- | --- | --- | --- |
| FR-3513-01 | Save | Click | * If Modify reason is selected   + update the IE\_CSA\_SOURCE table with value selected from the drop-down * End If |

#### Save – Click – Validation

| **FR #** | **Field** | **Format / Event** | **Requirement** |
| --- | --- | --- | --- |
| FR-3514-01 | Save | Click (Modify Reason is required) | * If Modify Reason is blank then   + display an error message: “Modify Reason is required.” * End If |

#### Cancel – Click – Action

| **FR #** | **Field** | **Format / Event** | **Requirement** |
| --- | --- | --- | --- |
| FR-3515-01 | Cancel | Click | * Close the modal |

## Add/Edit Comment Modal Window

Comment modal look and feel, and functionality will be the same as IMPROVE secured.

Graphical user interface, text, application, email

Description automatically generated

#### Default Display

| **FR #** | **Field** | **Format / Event** | **Requirement** |
| --- | --- | --- | --- |
| FR-3611-01 | Comments | N/A | * When the Comments button is clicked, the system will open the comment modal * Title: Add Comment * Comments is required field with red asterisk * Comment text box is blank by default |

#### Buttons

|  |  |  |  |
| --- | --- | --- | --- |
| **FR #** | **Field** | **Format / Event** | **Requirement** |
| FR-3612-01 | Save | N/A | * Enabled   + Always * Disabled   + Never |
| FR-3612-02 | Cancel | N/A | * Enabled   + Always * Disabled   + Never |

#### Save – Click – Action

| **FR #** | **Field** | **Format / Event** | **Requirement** |
| --- | --- | --- | --- |
| FR-3613-01 | Save | Click | * When Comments are added   + update the IE\_CSA\_COMMENTS table * End If |

#### Save – Click – Validation

| **FR #** | **Field** | **Format / Event** | **Requirement** |
| --- | --- | --- | --- |
| FR-3613-01 | Save | Click (Comment is required) | * If a comment is not added, display an error message.   + Comment is required |

#### Save – Click – Action

| **FR #** | **Field** | **Format / Event** | **Requirement** |
| --- | --- | --- | --- |
| FR-3615-01 | Cancel | Click | * Close the modal |

## Delete Lease Modal Window

Graphical user interface, text, application

Description automatically generated

#### Default Display

| **FR #** | **Field** | **Format / Event** | **Requirement** |
| --- | --- | --- | --- |
| FR-3711-01 | Delete Lease Modal Window | Default Display | * N/A |

#### Buttons

|  |  |  |  |
| --- | --- | --- | --- |
| **FR #** | **Field** | **Format / Event** | **Requirement** |
| FR-3712-01 | Ok | N/A | * Enabled   + Always * Disabled   + Never |
| FR-3712-02 | Cancel | N/A | * Enabled   + Always * Disabled   + Never |

#### OK – Click - Action

| **FR #** | **Field** | **Format / Event** | **Requirement** |
| --- | --- | --- | --- |
| FR-3713-01 | Ok | Click | * Deletes the lease. * Close the modal window. |

#### Cancel – Click – Action

| **FR #** | **Field** | **Format / Event** | **Requirement** |
| --- | --- | --- | --- |
| FR-3714-01 | Cancel | Click | * Close the modal window. * Do not delete the lease |

## Delete Income and Expenses Modal Window

Graphical user interface, text, application

Description automatically generated

#### Default Display

| **FR #** | **Field** | **Format / Event** | **Requirement** |
| --- | --- | --- | --- |
| FR-3811-01 | Delete Income and Expenses Modal Window | Default Display | * N/A |

#### Buttons

|  |  |  |  |
| --- | --- | --- | --- |
| **FR #** | **Field** | **Format / Event** | **Requirement** |
| FR-3812-01 | Ok | N/A | * Enabled   + Always * Disabled   + Never |
| FR-3812-02 | Cancel | N/A | * Enabled   + Always * Disabled   + Never |

#### Ok – Click – Action

| **FR #** | **Field** | **Format / Event** | **Requirement** |
| --- | --- | --- | --- |
| FR-3813-01 | Ok | Click | * Close the modal window * Deletes Income and Expenses tabs data |

#### Cancel – Click – Action

| **FR #** | **Field** | **Format / Event** | **Requirement** |
| --- | --- | --- | --- |
| FR-3814-01 | Cancel | Click | * Close the modal window * Do not delete Income and Expenses tabs data |

## Edit Primary APN Modal Window

Graphical user interface, table

Description automatically generated with medium confidence

### Default Display

| **FR #** | **Field** | **Format / Event** | **Requirement** |
| --- | --- | --- | --- |
| FR-391-01 | Edit Primary APN Modal Window | Default Display | * Get all APN for the change of ownership document (print parcel, sort parcel and Property ID) * Display print parcel in sort parcel order ascending |

### Buttons

|  |  |  |  |
| --- | --- | --- | --- |
| **FR #** | **Field** | **Format / Event** | **Requirement** |
| FR-392-01 | Save | N/A | * Enabled   + Always * Disabled   + Never |
| FR-392-02 | Cancel | N/A | * Enabled   + Always * Disabled   + Never |

### Save – Click – Action

| **FR #** | | **Field** | | **Format / Event** | | **Requirement** | |
| --- | --- | --- | --- | --- | --- | --- | --- |
| FR-393-01 | | Save | | Click | | * Close the modal window * Page is refreshed and selected APN is displayed | |
| FR-3322-02 | | Edit Primary APN | | Save | | * Update Sale Info Table * Check Property ID, Sort Parcel, and Print Parcel * UPDATE ieaown.ie\_csa\_sale\_info * SET   + property\_id = property\_id of primary APN selected,   + update\_worker = Logged in\_workerID,   + update\_ts = current timestamp, * End if | |

### Cancel – Click – Action

| **FR #** | **Field** | **Format / Event** | **Requirement** |
| --- | --- | --- | --- |
| FR-394-01 | Cancel | Click | * Close the modal window |

## Add/Edit Lease Modal

Graphical user interface, application

Description automatically generated

### Default Display

| **FR #** | **Field** | **Format / Event** | **Requirement** |
| --- | --- | --- | --- |
| FR-3101-01 | Modal Window | Default display  (Opened From Income tab> Add Lease | * When the Add Lease is clicked from Income Tab a blank Add lease modal window is opened * Use for Rent Comp Fields enabled:   + APN   + Location   + Lessee   + Current Rent   + Option   + Use for Rent Comp (No)   + Sq Ft Leased/Available   + Start Date   + Vacant (No)   + Term(Months)   + Lease Type(Blank)   + Expense Type(Blank) * Fields disabled:   + Use Category   + Subcat   + Anticipated Rent   + Start Rent   + Stabilized Rent   + Info Source   + Rent Adjustment   + Parking   + Tenancy   + Expense Base Year   + TI Allowance   + TI Allowance Type |
| FR-3101-02 | Window | Default display  (Opened From Income tab> Add Lease | * Industrial Info frame fields disabled:   + Clear Height   + % Office Area   + % Lab   + % Manufacturing   + % Total |
| FR-3101-03 | Window | Default display  (Opened From Income tab> Add Lease | * Office Info frame fields disabled:   + Load Factor   + Annual Expense Stop |
| FR-3101-04 | Window | Default display  (Opened From Income tab> Add Lease | * Commercial Info frame fields disabled:   + Percentage Rent   + Breakpoint |
| FR-3101-05 | Window | Default display  (Opened From Income tab> Edit Lease | * When Edit Lease is clicked the system will get the Lease data and populate it into the modal * **Lease data =** [**Get Lease Info**](#_Get_Lease_Info) passing (CSA\_ID)   Populate the **Lease** D**ata** into the Lease modal   * For technical details, refer to section |

### Add/Edit Lease Fields

Add Lease Tab Fields

| **FR #** | **Field** | **Format / Event** | **Requirement** |
| --- | --- | --- | --- |
| FR-3102-01 | APN | * Drop Down | * APN * Required * Dropdown * Values: see [APN DropDown](#_Get_APN) |
| FR-3102-02 | Location | * Alphanumeric * Maximum length: 50 | * Location * Required * Textbox |
| FR-3102-03 | Lessee | * Alphanumeric * Maximum length: 50 | * Lessee * Texbox |
| FR-3102-04 | Use Category | * Drop Down | * Conditionally Required * Dropdown * Values: see [Use Category](#_Use_Category_Drop) |
| FR-3102-05 | Per Sq Ft (Current Rent) | * Numeric | * Formula: (Current Rent)/ (Sq Ft Leased/Available) |
| FR-3102-06 | Subcat | * Drop Down | * Conditionally Required * Dropdown * Values: see [Subcat](#_Subcat_Drop_Down) |
| FR-3102-07 | Current Rent | * Numeric * Maximum Length: 12 | * Conditionally Required * Textbox |
| FR-3102-08 | Anticipated Rent | * Numeric * Maximum Length: 12 | * Conditionally Required * Textbox |
| FR-3102-09 | Per Sq Ft (Anticipated Rent) | * Numeric | * Formula: (Anticipated Rent)/ (Sq Ft Leased/Available) |
| FR-3102-10 | Start Rent | * Numeric * Maximum Length: 12 | * Conditionally Required |
| FR-3102-11 | Per Sq Ft (Start Rent) | * Numeric | * Formula: Start Rent/ (Sq Ft Leased/Available) |
| FR-3102-12 | Stabilized Rent | * Numeric * Max length: | * Textbox |
| FR-3102-13 | Per Sq Ft (Start Rent) | * Numeric * Maximum Length: 12 | * Formula: Stabilized Rent/ Sq Ft Leased/Available) |
| FR-3102-14 | Option | * Alphanumeric * Max length: 50 |  |
| FR-3102-15 | Info Source | * Alphanumeric * Max length: 50 | * Conditionally required |
| FR-3102-16 | Rent Adjustment | * Alphanumeric * Max length: 50 | * Conditionally required |
| FR-3102-17 | Parking | * Alphanumeric * Max length: | * Textboxes |
| FR-3102-18 | Use for Rent Comp | * Alphanumeric * Max length: | * Required |
| FR-3102-19 | Sq Ft Leased/Available | * Numeric * Max length: 8 | * Required |
| FR-3102-20 | Start Date | * Alphanumeric * Max length:4 | * Required * Calendar Picker |
| FR-3102-21 | Tenancy | * Drop Down | * Drop Down * Value: see [Tenancy](#_Tenancy_Drop_Down) |
| FR-3102-22 | Lease Type | * Alphanumeric * Max length: | * Drop Down * Value: see [Lease Type](#_Lease_Type_Drop) |
| FR-3102-23 | Expense Type | * Drop down | * Conditionally Required * Dropdown * Value: see [Expense Type](#_Expense_Type_Drop) |
| FR-3102-24 | TI Allowance | * Alphanumeric * Max length:10 | * Conditionally Required * Textbox |
| FR-3102-25 | TI Allowance Type | * Drop Down | * Dropdown * Value: see [TI Allowance Type](#_TI_Allowance_Type) |

**Industrial Info Frame Fields**

| **FR #** | **Field** | **Format / Event** | **Requirement** |
| --- | --- | --- | --- |
| FR-3102-23 | Clear Height | * Alphanumeric * Max length:3 | * Conditionally required * Text box |
| FR-3102-24 | % Office Area | * Alphanumeric * Max length:3 | * Conditionally required * Text box |
| FR-3102-25 | % Lab | * Alphanumeric * Max length:3 | * Conditionally required * Text box |
| FR-3102-26 | % Manufacturing | * Alphanumeric * Max length:3 | * Conditionally required * Text box |
| FR-3102-27 | % Total | * Alphanumeric * Max length:3 | * Calculated field * Sum of % office Area, % Lab, and % Manufacturing |

**Office Info Frame Fields**

| **FR #** | **Field** | **Format / Event** | **Requirement** |
| --- | --- | --- | --- |
| FR-3102-28 | Load Factor | * Alphanumeric * Max length: 5 | * Conditionally required * Text box |
| FR-3102-29 | Annual Expense Stop | * Alphanumeric * Max length: 12 | * Conditionally required * Text box |

**Commercial Info Frame fields**

| **FR #** | **Field** | **Format / Event** | **Requirement** |
| --- | --- | --- | --- |
| FR-3102-30 | Percentage Rent | * Numeric * Max Length: 5 | * Conditionally required * Text box |
| FR-3102-31 | Breakpoint | * Numeric * Max Length: 12 | * Conditionally required * Text box |

### Save – Click – Action

| **FR #** | **Field** | **Format / Event** | **Requirement** |
| --- | --- | --- | --- |
| FR-3103-01 | Save | Click | * Perform Data Validations * If errors   + Display error message   + Do not save * If no errors proceed to next FR * If no errors update the database with the input values from the form |
| FR-3103-02 | Save | Click (Update DB) | * Update the database: * Form fields from the UI are saved to the database. * See the UI fields to database field mapping in the section [Add Lease Fields](#_Add_Lease_Fields) |

### Save – Click – Data Validations

| **FR #** | **Field** | **Format / Event** | **Requirement** |
| --- | --- | --- | --- |
| FR-3104-01 | Save | Click (Use for Rent Comp =No – Required fields) | * If Use for Rent Comp is set as No, then Location cannot be blank * If Use for Rent Comp is set as No, and Location is blank then,   + Display an error message, “Location is required.”   If there are validation errors  Display error message  No further processing  Else  Save Data  Continue  End If |
| FR-3104-02 | Save | Click (Use for Rent Comp =No – Required fields) | * If Use for Rent Comp is set as No, then Sq Ft Leased/Available cannot be blank and value entered is not greater than 0 and less or equal to 999,999,999 then,   + Display an error message, Sq Ft Leased/Available must be > 0 and <= 999,999,999. |
| FR-3104-03 | Save | Click (Use for Rent Comp =No – Required fields) | * If Use for Rent Comp is set as No, then Current Rent cannot be blank. * If Use for Rent Comp is set as No and Current Rent is blank then,   + Display and error message, “Current Rent is required.” |
| FR-3104-04 | Save | Click (Use for Rent Comp =Yes – Required fields) | * If Use for Rent Comp is set as Yes, then Location cannot be blank * If Use for Rent Comp is set as Yes, and Location is blank then,   + Display an error message, “Location is required.”   If there are validation errors  Display error message  No further processing  Else  Save Data  Continue   * End If |
| FR-3104-05 |  | Click (Use for Rent Comp =Yes – Required fields) | * If Use for Rent Comp is set as Yes, then Sq Ft Leased/Available cannot be blank and value entered is not greater than 0 and less or equal to 999,999,999 then,   + Display an error message, Sq Ft Leased/Available must be > 0 and <= 999,999,999. |
| FR-3104-06 | Save | Click (Use for Rent Comp =Yes – Required fields) | * If Use for Rent Comp is set as Yes and Start Date is not selected then,   + Display an error message, Start Date is required. |
| FR-3104-07 | Save | Click (Use for Rent Comp =Yes – Required fields) | * If Use for Rent Comp is set as Yes and Start Date is not selected then,   + Display an error message, Term (Months) is required. |
| FR-3104-08 | Save | Click (Use for Rent Comp =Yes – Required fields) | * If Use for Rent Comp is set as Yes and Use Category is not selected then,   + Display an error message, Use Category is required. |
| FR-3104-09 | Save | Click (Use for Rent Comp =Yes – Required fields) | * If Use for Rent Comp is set as Yes and Subcategory is not selected then,   + Display an error message, Subcategory is required. |
| FR-3104-10 | Save | Click (Use for Rent Comp =Yes – Required fields) | * If Use for Rent Comp is set as Yes and Expense Type is not selected then,   + Display an error message, Expense Type is required. |
| FR-3104-11 | Save | Click (Use for Rent Comp =Yes – Required fields) | * If Use for Rent Comp is set as Yes and Start Rent is not entered then,   + Display an error message, Start Date is required. |
| FR-3104-11 | Save | Click | * If Use for Rent Comp is set as Yes and Info Source is not entered then,   + Display an error message, Info Source is required. |

### Cancel – Click – Action

| **FR #** | **Field** | **Format / Event** | **Requirement** |
| --- | --- | --- | --- |
| FR-3105-01 | Cancel | Click | * Close the modal window |

## APN List Modal Window

Graphical user interface, application, Word

Description automatically generated

### Default Display

| **FR #** | **Field** | **Format / Event** | **Requirement** |
| --- | --- | --- | --- |
|  | APN List Modal Window | Default Display | N/A |

### Buttons

|  |  |  |  |
| --- | --- | --- | --- |
| **FR #** | **Field** | **Format / Event** | **Requirement** |
| FR-3112-01 | Close | N/A | * Enabled   + Always * Disabled   + Never |

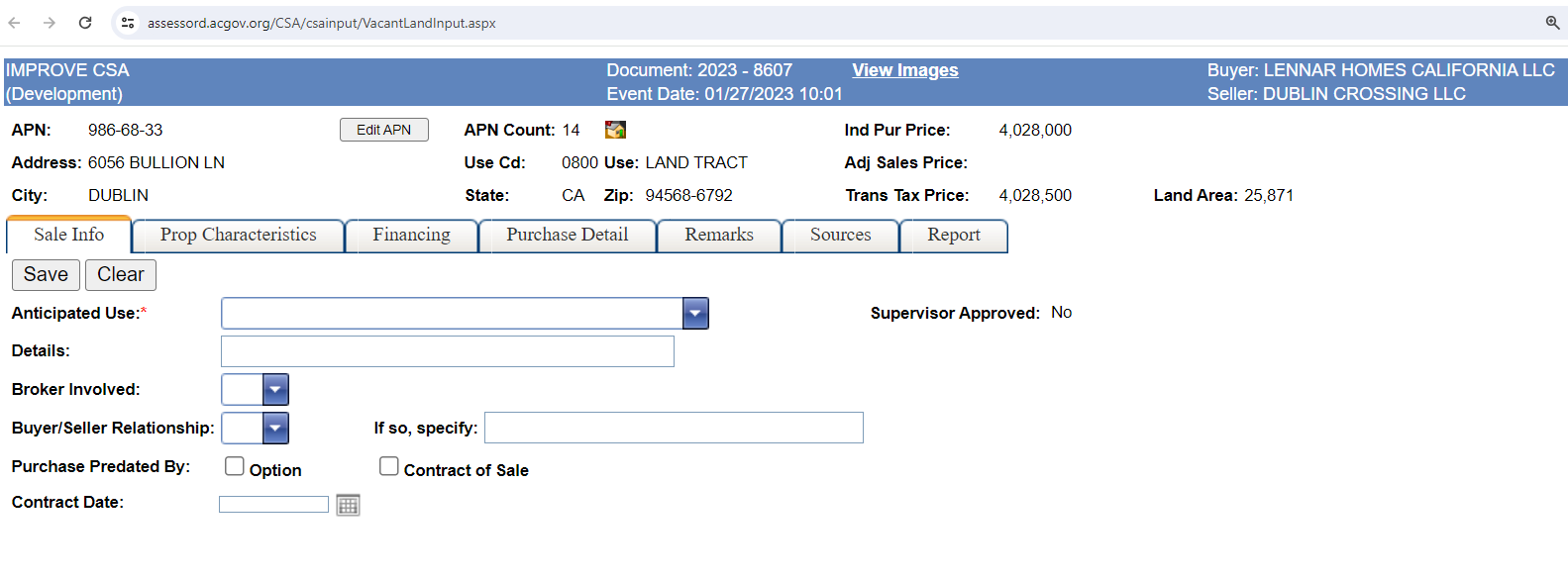
### Close – Click – Action

|  |  |  |  |
| --- | --- | --- | --- |
| **FR #** | **Field** | **Format / Event** | **Requirement** |
| FR-3113-01 | Close | Click | * Close the modal window |

## Vacant Land Improvement Window

<<Description>>

<<Screen mock-up>>



| **FR #** | **Field** | **Format / Event** | **Requirement** |
| --- | --- | --- | --- |
|  | Window | Open | * One instance of Commercial Sales Analysis window can be opened.   + URL title << https://assessord.acgov.org/CSA/csainput/VacantLandInput.aspx>> is opened |
|  | Window Content | Toolbar | Toolbar contains these buttons:   * Edit * Save * Clear |
|  | Window Content | Frames and Tabs | Window contains:   * Toolbar * Property Doc Frame * Sales Frame * Tab - Sale Info * Tab - Prop Characteristics * Tab - Financing * Tab – Purchase Detail * Tab - Remarks * Tab - Sources * Tab - Report |
|  | Window | Standards | All field labels are per standards.  All column headings are per standards.   * Refer to SharePoint document [IMPROVE.NET UI\_ErrorMessage Guidelines](https://acgovt.sharepoint.com/:w:/s/IMPROVENET/EY3QBy8h-G1Mk7hOd-0cUpUBQRrqWP1F0-2OEWmQSddRsg?e=odlET9) |

### Default Display

| **FR #** | **Field** | **Format / Event** | **Requirement** |
| --- | --- | --- | --- |
| FR-331-01 | Window | Default display  (Opened From Improve>Sales Analysis > Select Vacant Land | * When the Commercial-Industrial Input is selected from Sales Analysis pop up in Improve.net the CSA app is opened in a new window with the following parameters: * APN * Address * City * APN Count * Use Cd * Use * State * Zip * Ind Pur Price * Adj Sales Price * Trans Tax Price * Land Area |
|  | *Window* | From menu | * + Specify status and contents of fields and buttons |

### Toolbar Buttons

*List buttons and its order*

| ***FR #*** | ***Field*** | ***Format / Event*** | ***Requirement*** |
| --- | --- | --- | --- |
|  | *Save* | *N/A* | *Enabled*   * + *When Mapping Action is not yet done*   *Disabled*   * + *When Mapping Action is done* |
|  | *Task Complete* | *N/A* | *Enabled*   * + *When Mapping Action is done and document status is ‘NEW’*   *Disabled*   * + *When Mapping Action is not yet done*   + *When Mapping Action is done and document status is ‘ASSESSMENT ROLL SUPERVISOR APPROVED’* |

### <<Toolbar Button Action>>

*When toolbar –PPR is clicked, Property Permit Record for the selected row is printed*

| ***FR #*** | ***Field*** | ***Format / Event*** | ***Requirement*** |
| --- | --- | --- | --- |
| *FR-240-1* | *PPR* | *Click* | *Validate and Auto Save data*  *If there are validation errors*  *Display error message*  *No further processing*  *Else*  *Save Data*  *Continue*  *End If* |

### Sales Info Tab Input Fields

#### <<Field >> - Action

<<Fields which invoke actions like lose focus, tab out, change etc>>

| **FR #** | **Field** | **Format / Event** | **Requirement** |
| --- | --- | --- | --- |
|  | *Deleted* | *Changed from blank or ‘No’ to ‘Yes’* | *If any APN on the permit is already processed i.e. (process code other than new) , display error message*  *‘APN << first such APN>> has already been processed. This permit cannot be deleted.’*  *When ‘OK’ is clicked,*   * *Message is closed* * *Change ‘Deleted’ to previous value* * *No further action* |

#### <<Field>> – Data Validations

| **FR #** | **Field** | **Format / Event** | **Requirement** |
| --- | --- | --- | --- |
|  | *Permit Year* | *Save – Click* | *This is Year part of Permit No*  *If Permit Year is blank, display error message ‘Permit Year is required.’* |
|  |  |  |  |

### Prop Characteristics T

### Financing Tab Input Fields

### Purchase Detail Tab Input Fields

### Sources Tab Input Fields

### Report

#### Report – Preview – Click – Action

## Processes

## <<tab name>> Tab

| **FR #** | **Field** | **Format / Event** | **Requirement** |
| --- | --- | --- | --- |
| *FR-246-1* | *Comments tab* | *Startup* | * *When new Permit Maintenance is opened, Comments tab will be the default tab opened* * *When existing Permit Maintenance is opened, Comments tab will be the default tab opened* |

### <<Events / Actions>>

| **FR #** | **Field** | **Format / Event** | **Requirement** |
| --- | --- | --- | --- |
| *FR-246-11* | *Add Icon* | *Click* | * *Add Comment pop-up will be displayed.* * *For detail requirement, refer to* [*Comments Functional Requirements*](http://itdportal/projects/IMPROVE%20.NET/Requirements/Phase%201/Approved/Comments%20Functional%20Requirements.doc) * *Comments FR-110 needs to be updated for Type Permit (384)* |

## Concurrency

| **FR #** | **Field** | **Format / Event** | **Requirement** |
| --- | --- | --- | --- |
|  |  |  |  |

# Technical Details

**Note – The logic specified in this section is for reference only.**

**Coding should be done per Design.**

## Drop Downs

### Modify Reason Drop Down

SP Name: IE\_CSA\_GET\_FIELD\_CODE\_CD

Display: LONG\_NAME

Store: FIELD\_ID

SELECT

IEAOWN.IE\_FIELD\_CODE.CD\_ID,

IEAOWN.IE\_FIELD\_CODE.CD\_SHORT\_NAME,

IEAOWN.IE\_FIELD\_CODE.CD\_LONG\_NAME,

IEAOWN.IE\_FIELD\_CODE.SORT\_SEQ

FROM

IEAOWN.IE\_FIELD\_CODE

WHERE

IEAOWN.IE\_FIELD\_CODE.FIELD\_ID = 130

ORDER BY

IEAOWN.IE\_FIELD\_CODE.SORT\_SEQ,

CAST(UPPER(CD\_SHORT\_NAME) AS VARCHAR(15) CCSID ASCII),

CAST(UPPER(CD\_LONG\_NAME) AS VARCHAR(50) CCSID ASCII)

### Condition At Sale Drop Down

SP Name: IE\_CSA\_GET\_FIELD\_CODE\_CD

Display: LONG\_NAME

Store: FIELD\_CODE

SELECT

IEAOWN.IE\_FIELD\_CODE.CD\_ID,

IEAOWN.IE\_FIELD\_CODE.CD\_SHORT\_NAME,

IEAOWN.IE\_FIELD\_CODE.CD\_LONG\_NAME,

IEAOWN.IE\_FIELD\_CODE.SORT\_SEQ

FROM

IEAOWN.IE\_FIELD\_CODE

WHERE

IEAOWN.IE\_FIELD\_CODE.FIELD\_ID = 120

ORDER BY

IEAOWN.IE\_FIELD\_CODE.SORT\_SEQ,

CAST(UPPER(CD\_SHORT\_NAME) AS VARCHAR(15) CCSID ASCII),

CAST(UPPER(CD\_LONG\_NAME) AS VARCHAR(50) CCSID ASCII)

### Benchmark Rating Drop Down

SP: IE\_GET\_FIELD\_CODE (Passing Field\_ID)

Passing Field\_ID

Display: LONG\_NAME

SELECT

IEAOWN.IE\_FIELD\_CODE.CD\_ID,

IEAOWN.IE\_FIELD\_CODE.CD\_SHORT\_NAME,

IEAOWN.IE\_FIELD\_CODE.CD\_LONG\_NAME,

IEAOWN.IE\_FIELD\_CODE.SORT\_SEQ

FROM

IEAOWN.IE\_FIELD\_CODE

WHERE

IEAOWN.IE\_FIELD\_CODE.FIELD\_ID = 121

ORDER BY

IEAOWN.IE\_FIELD\_CODE.SORT\_SEQ,

CAST(UPPER(CD\_SHORT\_NAME) AS VARCHAR(15) CCSID ASCII),

CAST(UPPER(CD\_LONG\_NAME) AS VARCHAR(50) CCSID ASCII)

### Anticipated Use Drop Down

Display: LONG\_NAME

Store: ANTICIPATED\_USE\_CD in Sale Info Table

SP Name: IE\_CSA\_GET\_ANTICIPATED\_USE\_CODES\_NOT\_FOR\_LAND\_USE

SELECT

IEAOWN.IE\_CSA\_ANTICIP\_USE.ANTICIPATED\_USE\_CD,

IEAOWN.IE\_CSA\_ANTICIP\_USE.USE\_NAME,

IEAOWN.IE\_CSA\_ANTICIP\_USE.USE\_NAME\_SHORT

FROM

IEAOWN.IE\_CSA\_ANTICIP\_USE

WHERE

(LAND\_USE\_FL IS NULL OR LAND\_USE\_FL <> 'Y')

ORDER BY

CAST(UPPER(USE\_NAME) AS VARCHAR(50) CCSID ASCII);

### Primary Source Drop Down

select CD\_LONG\_NAME from IEAOWN.IE\_FIELD\_CODE

WHERE FIELD\_ID = 114;

### Secondary Source Drop Down

select CD\_LONG\_NAME from IEAOWN.IE\_FIELD\_CODE

WHERE FIELD\_ID = 114;

### Use Category Drop Down

SP: IE\_GET\_CSA\_LEASE\_USE\_CATEGORY ()

SELECT

    IEAOWN.IE\_LEASE\_USE\_CAT.USE\_CATEGORY\_CD,

    RTRIM(LTRIM(IEAOWN.IE\_LEASE\_USE\_CAT.USE\_NAME)) AS USE\_NAME,

    END\_DT

FROM

    IEAOWN.IE\_LEASE\_USE\_CAT

ORDER BY

    IEAOWN.IE\_LEASE\_USE\_CAT.USE\_NAME

### Subcat Drop Down

SP: IE\_GET\_CSA\_LEASE\_USE\_SUB\_BY\_USE\_CAT passing USE\_CAT

SELECT

    IEAOWN.IE\_LEASE\_SUBCAT.LEASE\_SUBCATEGORY,

    LTRIM(RTRIM(IEAOWN.IE\_LEASE\_SUBCAT.SUBCATEGORY\_NAME)) AS SUBCATEGORY\_NAME,

    END\_DT

FROM

    IEAOWN.IE\_LEASE\_SUBCAT

WHERE

    IEAOWN.IE\_LEASE\_SUBCAT.USE\_CATEGORY\_CD = P\_USE\_CAT

ORDER BY

    IEAOWN.IE\_LEASE\_SUBCAT.SUBCATEGORY\_NAME

### Tenancy Drop Down

SELECT

IEAOWN.IE\_FIELD\_CODE.CD\_ID,

IEAOWN.IE\_FIELD\_CODE.CD\_SHORT\_NAME,

IEAOWN.IE\_FIELD\_CODE.CD\_LONG\_NAME,

IEAOWN.IE\_FIELD\_CODE.SORT\_SEQ

FROM

IEAOWN.IE\_FIELD\_CODE

WHERE

IEAOWN.IE\_FIELD\_CODE.FIELD\_ID = 125

ORDER BY

IEAOWN.IE\_FIELD\_CODE.SORT\_SEQ,

CAST(UPPER(CD\_SHORT\_NAME) AS VARCHAR(15) CCSID ASCII),

CAST(UPPER(CD\_LONG\_NAME) AS VARCHAR(50) CCSID ASCII)

### Lease Type Drop Down

Display: FC.CD\_LONG\_NAME

Store: FC.CD\_ID

SELECT

IEAOWN.IE\_FIELD\_CODE.CD\_ID,

IEAOWN.IE\_FIELD\_CODE.CD\_SHORT\_NAME,

IEAOWN.IE\_FIELD\_CODE.CD\_LONG\_NAME,

IEAOWN.IE\_FIELD\_CODE.SORT\_SEQ

FROM

IEAOWN.IE\_FIELD\_CODE

WHERE

IEAOWN.IE\_FIELD\_CODE.FIELD\_ID = 123

ORDER BY

IEAOWN.IE\_FIELD\_CODE.SORT\_SEQ,

CAST(UPPER(CD\_SHORT\_NAME) AS VARCHAR(15) CCSID ASCII),

CAST(UPPER(CD\_LONG\_NAME) AS VARCHAR(50) CCSID ASCII)

### Expense Type Drop Down

Display: FC.CD\_LONG\_NAME

Store: FC.CD\_ID

SELECT

IEAOWN.IE\_FIELD\_CODE.CD\_ID,

IEAOWN.IE\_FIELD\_CODE.CD\_SHORT\_NAME,

IEAOWN.IE\_FIELD\_CODE.CD\_LONG\_NAME,

IEAOWN.IE\_FIELD\_CODE.SORT\_SEQ

FROM

IEAOWN.IE\_FIELD\_CODE

WHERE

IEAOWN.IE\_FIELD\_CODE.FIELD\_ID = 124

ORDER BY

IEAOWN.IE\_FIELD\_CODE.SORT\_SEQ,

CAST(UPPER(CD\_SHORT\_NAME) AS VARCHAR(15) CCSID ASCII),

CAST(UPPER(CD\_LONG\_NAME) AS VARCHAR(50) CCSID ASCII)

### TI Allowance Type Drop Down

Display: FC.CD\_LONG\_NAME

Store: FC.CD\_ID

SELECT

IEAOWN.IE\_FIELD\_CODE.CD\_ID,

IEAOWN.IE\_FIELD\_CODE.CD\_SHORT\_NAME,

IEAOWN.IE\_FIELD\_CODE.CD\_LONG\_NAME,

IEAOWN.IE\_FIELD\_CODE.SORT\_SEQ

FROM

IEAOWN.IE\_FIELD\_CODE

WHERE

IEAOWN.IE\_FIELD\_CODE.FIELD\_ID = 133

ORDER BY

IEAOWN.IE\_FIELD\_CODE.SORT\_SEQ,

CAST(UPPER(CD\_SHORT\_NAME) AS VARCHAR(15) CCSID ASCII),

CAST(UPPER(CD\_LONG\_NAME) AS VARCHAR(50) CCSID ASCII)

### Worker Name (Created By)

SP: IE\_CSA\_GET\_ALL\_WORKER

SELECT

    worker\_id,

    (last\_name || COALESCE(', ' || first\_name, '') || COALESCE(' ' || middle\_name, '')) AS worker\_name

FROM

    ieaown.ie\_worker

ORDER BY

    worker\_name;

### Get APN

SP: IE\_GET\_CSA\_ALL\_APN\_IN\_DOC Passing CSA\_ID

SELECT

    IEAOWN.IE\_REAL\_PROPERTY.PROPERTY\_ID,

    IEAOWN.IE\_REAL\_PROPERTY.PRINT\_PARCEL,

    IEAOWN.IE\_REAL\_PROPERTY.SORT\_PARCEL,

    IEAOWN.IE\_PARCEL\_DET.SEQ\_NUM

FROM

    IEAOWN.IE\_DOCUMENT,

    IEAOWN.IE\_PARCEL\_DET,

    IEAOWN.IE\_REAL\_PROPERTY,

    IEAOWN.IE\_CSA\_SALE\_INFO

WHERE

    IEAOWN.IE\_DOCUMENT.DOC\_PREFIX = IEAOWN.IE\_PARCEL\_DET.DOC\_PREFIX

    AND IEAOWN.IE\_DOCUMENT.DOC\_SERIES = IEAOWN.IE\_PARCEL\_DET.DOC\_SERIES

    AND IEAOWN.IE\_DOCUMENT.DOC\_PREFIX = IEAOWN.IE\_CSA\_SALE\_INFO.DOC\_PREFIX

    AND IEAOWN.IE\_DOCUMENT.DOC\_SERIES = IEAOWN.IE\_CSA\_SALE\_INFO.DOC\_SERIES

    AND IEAOWN.IE\_PARCEL\_DET.PRINT\_PARCEL = IEAOWN.IE\_REAL\_PROPERTY.PRINT\_PARCEL

    AND (IEAOWN.IE\_PARCEL\_DET.END\_DT IS NULL)

    AND IEAOWN.IE\_CSA\_SALE\_INFO.CSA\_ID = P\_CSA\_ID

ORDER BY

    IEAOWN.IE\_PARCEL\_DET.SEQ\_NUM;

## Lookups

### Get Sale Info

This method fetches the Sale info tab data passing in CSA\_ID

Table: IE\_CSA\_SALE\_INFO csi

SP Name: IE\_CSA\_GET\_CSA\_SALE\_INFO\_FULL passing in (CSA\_ID)

SELECT

csi.CSA\_ID,

csi.CSA\_TYPE,

csi.DOC\_PREFIX,

csi.DOC\_SERIES,

csi.PROPERTY\_ID,

csi.USE\_CD,

csi.CSA\_PROP\_USE\_CD,

csi.CSA\_PROP\_USE\_DETL,

csi.ANTICIPATED\_USE\_CD,

csi.COND\_AT\_SALE\_CD,

csi.FULL\_EXPENSES\_FL,

csi.RELEASE\_DT,

csi.BROKER\_INVOLVED\_FL,

csi.TOT\_BUILDING\_AREA,

csi.TOT\_NET\_RENT\_AREA,

csi.TOT\_LOT\_SIZE,

csi.SHAPE\_CD,

csi.BENCHMARK\_RATE\_CD,

csi.ZONING\_CD,

csi.ZONING\_AGENCY\_CD,

csi.BUY\_SELL\_REL\_FL,

csi.BUY\_SELL\_REL\_DESC,

csi.PUR\_PREDATE\_BY\_OPT,

csi.PUR\_PRED\_CONT\_SALE,

csi.PREDATE\_CONT\_DATE,

csi.PCT\_OWNER\_OCCUP,

csi.SUPRV\_APPROVED\_FL,

csi.ENTRY\_TS,

csi.ENTRY\_WORKER,

csi.UPDATE\_TS,

csi.UPDATE\_WORKER,

IEAOWN.IE\_CHG\_OWNER.EVENT\_TS,

IEAOWN.IE\_REAL\_PROPERTY.PRINT\_PARCEL,

fcd.CD\_LONG\_NAME AS PROP\_USE\_TEXT,

fcd2.CD\_LONG\_NAME AS COND\_AT\_SALE\_TEXT,

fcd3.CD\_LONG\_NAME AS BENCHMARK\_NAME,

ana.CSA\_NET\_RENT\_AREA,

(

WK1.LAST\_NAME ||

CASE WHEN IFNULL(WK1.FIRST\_NAME, '') = '' THEN '' ELSE ', ' || WK1.FIRST\_NAME END ||

CASE WHEN IFNULL(WK1.MIDDLE\_NAME, '') = '' THEN '' ELSE ' ' || WK1.MIDDLE\_NAME END

) AS SUPRV\_APPR\_WKR,

csi.ANTICIPATED\_USE\_CD,

csi.SUPRV\_APPROVED\_FL,

CASE csi.SUPRV\_APPROVED\_FL WHEN 'Y' THEN 'Yes' ELSE 'No' END AS SUPRV\_APPR\_TEXT,

csi.SUPRV\_APPR\_UPD\_WKR,

csi.SUPRV\_APPR\_UPD\_TS,

ant.USE\_NAME AS anti\_use\_cd\_name,

ant.USE\_NAME\_SHORT,

ant.LAND\_USE\_FL,

ant.USE\_AS\_IMPROVE\_FL

FROM

IEAOWN.IE\_CSA\_SALE\_INFO csi

LEFT OUTER JOIN

IEAOWN.IE\_FIELD\_CODE fcd ON csi.CSA\_PROP\_USE\_CD = fcd.CD\_ID

LEFT OUTER JOIN

IEAOWN.IE\_FIELD\_CODE fcd2 ON csi.COND\_AT\_SALE\_CD = fcd2.CD\_ID

LEFT OUTER JOIN

IEAOWN.IE\_FIELD\_CODE fcd3 ON csi.BENCHMARK\_RATE\_CD = fcd3.CD\_ID

LEFT OUTER JOIN

IEAOWN.IE\_CSA\_ANALYSIS ana ON csi.CSA\_ID = ana.CSA\_ID

LEFT OUTER JOIN

IEAOWN.IE\_CSA\_ANTICIP\_USE ant ON csi.ANTICIPATED\_USE\_CD = ant.ANTICIPATED\_USE\_CD

LEFT OUTER JOIN

IEAOWN.IE\_WORKER WK1 ON WK1.WORKER\_ID = csi.SUPRV\_APPR\_UPD\_WKR,

IEAOWN.IE\_CHG\_OWNER,

IEAOWN.IE\_REAL\_PROPERTY

WHERE

csi.CSA\_ID = P\_CSA\_ID

AND IEAOWN.IE\_CHG\_OWNER.DOC\_PREFIX = csi.DOC\_PREFIX

AND IEAOWN.IE\_CHG\_OWNER.DOC\_SERIES = csi.DOC\_SERIES

AND IEAOWN.IE\_REAL\_PROPERTY.PROPERTY\_ID = csi.PROPERTY\_ID;

### Get Page Title

SP: IE\_GET\_CSA\_PAGE\_TITLE passing CSA\_TYPE

SELECT

    IEAOWN.IE\_FIELD\_CODE.CD\_LONG\_NAME

FROM

    IEAOWN.IE\_FIELD\_CODE

WHERE

    IEAOWN.IE\_FIELD\_CODE.CD\_ID = P\_CSA\_TYPE;

### Get Property Info

SP: IE\_CSA\_GET\_PROP\_INFO passing in CSA\_ID coming from Vacant Land BLL

SELECT  
    IEAOWN.IE\_CSA\_SALE\_INFO.CSA\_ID,  
    IEAOWN.IE\_CSA\_SALE\_INFO.DOC\_PREFIX,  
    IEAOWN.IE\_CSA\_SALE\_INFO.DOC\_SERIES,  
    IEAOWN.IE\_CSA\_SALE\_INFO.PROPERTY\_ID,  
    IEAOWN.IE\_CSA\_SALE\_INFO.USE\_CD,  
    IEAOWN.IE\_CSA\_SALE\_INFO.TOT\_LOT\_SIZE,  
    IEAOWN.IE\_CSA\_SALE\_INFO.PCT\_OWNER\_OCCUP,  
    IEAOWN.IE\_REAL\_PROPERTY.PRINT\_PARCEL,  
    STRIP(  
        CASE  
            WHEN IFNULL(IEAOWN.IE\_REAL\_PROPERTY.SITUS\_STREET\_NUM, '') = '' THEN ''  
            ELSE ' ' || IEAOWN.IE\_REAL\_PROPERTY.SITUS\_STREET\_NUM  
        END  
        || CASE  
            WHEN IFNULL(IEAOWN.IE\_REAL\_PROPERTY.SITUS\_PRE\_DIRECT, '') = '' THEN ''  
            ELSE ' ' || STRIP(IEAOWN.IE\_REAL\_PROPERTY.SITUS\_PRE\_DIRECT)  
        END  
        || CASE  
            WHEN IFNULL(IEAOWN.IE\_REAL\_PROPERTY.SITUS\_STREET\_NAME, '') = '' THEN ''  
            ELSE ' ' || IEAOWN.IE\_REAL\_PROPERTY.SITUS\_STREET\_NAME  
        END  
        || CASE  
            WHEN IFNULL(IEAOWN.IE\_REAL\_PROPERTY.SITUS\_STREET\_SFX, '') = '' THEN ''  
            ELSE ' ' || STRIP(IEAOWN.IE\_REAL\_PROPERTY.SITUS\_STREET\_SFX)  
        END  
        || CASE  
            WHEN IFNULL(IEAOWN.IE\_REAL\_PROPERTY.SITUS\_POST\_DIRECT, '') = '' THEN ''  
            ELSE ' ' || STRIP(IEAOWN.IE\_REAL\_PROPERTY.SITUS\_POST\_DIRECT)  
        END  
        || CASE  
            WHEN IFNULL(IEAOWN.IE\_REAL\_PROPERTY.SITUS\_UNIT\_DESIG, '') = '' THEN ''  
            ELSE ' ' || STRIP(IEAOWN.IE\_REAL\_PROPERTY.SITUS\_UNIT\_DESIG)  
        END  
        || CASE  
            WHEN IFNULL(IEAOWN.IE\_REAL\_PROPERTY.SITUS\_UNIT\_NUM, '') = '' THEN ''  
            ELSE ' ' || IEAOWN.IE\_REAL\_PROPERTY.SITUS\_UNIT\_NUM  
        END  
    ) AS address,  
    IEAOWN.IE\_REAL\_PROPERTY.SITUS\_CITY\_NAME,  
    'CA' AS SITUS\_STATE,  
    STRIP(  
        IEAOWN.IE\_REAL\_PROPERTY.SITUS\_ZIP\_CD  
        || CASE  
            WHEN IFNULL(IEAOWN.IE\_REAL\_PROPERTY.SITUS\_ZIP\_PLUS\_4, '') = '' THEN ''  
            ELSE '-' || IEAOWN.IE\_REAL\_PROPERTY.SITUS\_ZIP\_PLUS\_4  
        END  
    ) AS ZIP\_CD,  
    IEAOWN.IE\_DOCUMENT.DOC\_PARCEL\_CNT,  
    IEAOWN.IE\_CHG\_OWNER.EVENT\_TS,  
    IEAOWN.IE\_CHG\_OWNER.IND\_PUR\_PRICE,  
    IEAOWN.IE\_CHG\_OWNER.ADJ\_SALES\_PRICE,  
    IFNULL(IEAOWN.IE\_CHG\_OWNER.XFER\_TAX\_PRICE\_CO, IEAOWN.IE\_CHG\_OWNER.XFER\_TAX\_PRICE\_CTY) AS TRAN\_TAX\_PRICE,  
    UPPER(IEAOWN.IE\_USE\_CODE.USE\_NAME\_SHORT) AS USE\_NAME,  
    IEAOWN.IE\_CSA\_SALE\_INFO.TOT\_NET\_RENT\_AREA,  
    IEAOWN.IE\_CSA\_SALE\_INFO.TOT\_BUILDING\_AREA  
FROM  
    IEAOWN.IE\_CSA\_SALE\_INFO  
LEFT OUTER JOIN ieaown.ie\_use\_code ON IEAOWN.IE\_CSA\_SALE\_INFO.use\_cd = ieaown.ie\_use\_code.use\_cd,  
IEAOWN.IE\_REAL\_PROPERTY,  
IEAOWN.IE\_DOCUMENT,  
IEAOWN.IE\_CHG\_OWNER  
WHERE  
    IEAOWN.IE\_CSA\_SALE\_INFO.PROPERTY\_ID = IEAOWN.IE\_REAL\_PROPERTY.PROPERTY\_ID  
    AND (IEAOWN.IE\_CSA\_SALE\_INFO.DOC\_PREFIX = IEAOWN.IE\_DOCUMENT.DOC\_PREFIX)  
    AND (IEAOWN.IE\_CSA\_SALE\_INFO.DOC\_SERIES = IEAOWN.IE\_DOCUMENT.DOC\_SERIES)  
    AND (IEAOWN.IE\_CSA\_SALE\_INFO.DOC\_PREFIX = IEAOWN.IE\_CHG\_OWNER.DOC\_PREFIX)  
    AND (IEAOWN.IE\_CSA\_SALE\_INFO.DOC\_SERIES = IEAOWN.IE\_CHG\_OWNER.DOC\_SERIES)  
    AND (IEAOWN.IE\_CSA\_SALE\_INFO.USE\_CD = IEAOWN.IE\_USE\_CODE.USE\_CD)  
    AND IEAOWN.IE\_CSA\_SALE\_INFO.CSA\_ID = 17128;

#### Get Mailing Name

SP: IE\_GET\_CSA\_MAILING\_MAILING\_NAME\_AS\_DATE passing in PROPERTY\_ID and AS\_OF\_DATE

SELECT

    IEAOWN.IE\_ADDRESS.ADDR\_ID,

    IEAOWN.IE\_ADDRESS.STD\_ADDR\_CD,

    IEAOWN.IE\_ADDRESS.MAILING\_NAME,

    IEAOWN.IE\_ADDRESS.CARE\_OF\_NAME,

    IEAOWN.IE\_ADDRESS.ATTENTION\_NAME

FROM

    IEAOWN.IE\_PROP\_ID\_ADDRESS

INNER JOIN

    IEAOWN.IE\_ADDRESS ON IEAOWN.IE\_ADDRESS.ADDR\_ID = IEAOWN.IE\_PROP\_ID\_ADDRESS.ADDR\_ID

WHERE

    IEAOWN.IE\_PROP\_ID\_ADDRESS.PROPERTY\_ID = **P\_PROPERTY\_ID**

    AND IEAOWN.IE\_ADDRESS.ADDR\_TYPE\_CD = 4

    AND IEAOWN.IE\_ADDRESS.EFFECTIVE\_TS <= **P\_AS\_OF\_DATE**

    AND (IEAOWN.IE\_ADDRESS.END\_TS >= **P\_AS\_OF\_DATE** OR IEAOWN.IE\_ADDRESS.END\_TS IS NULL);

Note: Date format: '1970-12-10 23:01:00.0'

### Get Prop Characteristics

Tables:

IE\_CSA\_PROP\_CHAR char

IE\_CSA\_SALE\_INFO csa

IE\_ZONING\_CODE zoc

SP: IE\_GET\_CSA\_PROP\_CHAR passing in (CSA\_ID)

SELECT

    csa.CSA\_ID,

    csa.ZONING\_AGENCY\_CD,

    csa.ZONING\_CD,

    zoc.ZONING\_NAME,

    csa.TOT\_BUILDING\_AREA,

    csa.TOT\_NET\_RENT\_AREA,

    csa.TOT\_LOT\_SIZE,

    char.SBE\_CLASS\_LOW,

    char.SBE\_CLASS\_HI,

    char.MVS\_CLASS\_LOW,

    char.MVS\_CLASS\_HI,

    char.BLDG\_BUILT\_YR\_LOW,

    char.BLDG\_BUILT\_YR\_HI,

    char.BLDG\_EFF\_YR\_LOW,

    char.BLDG\_EFF\_YR\_HI,

    char.PCT\_BUILT\_OUT\_LOW,

    char.PCT\_BUILT\_OUT\_HI,

    char.PCT\_OFFICE\_LOW,

    char.PCT\_OFFICE\_HI,

    char.NUM\_BUILDINGS\_LOW,

    char.NUM\_BUILDINGS\_HI,

    char.NUM\_STORIES\_LOW,

    char.NUM\_STORIES\_HI,

    char.AVG\_ACTUAL\_HT\_LOW,

    char.AVG\_ACTUAL\_HT\_HI,

    char.LAND\_IMP\_RATIO\_LOW,

    char.LAND\_IMP\_RATIO\_HI,

    char.FAR\_LOW,

    char.FAR\_HI,

    char.TOT\_PARKING

FROM

    IEAOWN.IE\_CSA\_SALE\_INFO csa

LEFT OUTER JOIN

    IEAOWN.IE\_ZONING\_CODE zoc ON

    csa.ZONING\_AGENCY\_CD = zoc.AGENCY\_CD

    AND csa.ZONING\_CD = zoc.ZONING\_CD

JOIN

    IEAOWN.IE\_CSA\_PROP\_CHAR char ON

    csa.CSA\_ID = char.CSA\_ID

WHERE

    csa.CSA\_ID =P\_CSA\_ID;

### Get Income Tab

Tables:

SP: IE\_CSA\_GET\_LEASE\_INFO passing in CSA\_ID

SELECT DISTINCT

    IEAOWN.IE\_CSA\_LEASE.LEASE\_ID,

    IEAOWN.IE\_CSA\_LEASE.CSA\_ID,

    IEAOWN.IE\_CSA\_LEASE.PROPERTY\_ID,

    IEAOWN.IE\_CSA\_LEASE.LEASE\_LOCATION,

    IEAOWN.IE\_CSA\_LEASE.SITUS\_CITY\_NAME,

    IEAOWN.IE\_CSA\_LEASE.LESSEE\_NAME,

    IEAOWN.IE\_CSA\_LEASE.VACANT\_FL,

    IEAOWN.IE\_CSA\_LEASE.NET\_RENTABLE\_AREA,

    IEAOWN.IE\_CSA\_LEASE.LEASE\_START\_DT,

    IEAOWN.IE\_CSA\_LEASE.LEASE\_TERM,

    IEAOWN.IE\_CSA\_LEASE.LEASE\_OPTION,

    IEAOWN.IE\_CSA\_LEASE.INITIAL\_RENT,

    IEAOWN.IE\_CSA\_LEASE.INITIAL\_RENT\_PSF,

    IEAOWN.IE\_CSA\_LEASE.STABIL\_RENT,

    IEAOWN.IE\_CSA\_LEASE.STABIL\_RENT\_PSF,

    IEAOWN.IE\_CSA\_LEASE.CURRENT\_RENT,

    IEAOWN.IE\_CSA\_LEASE.CURRENT\_RENT\_PSF,

    IEAOWN.IE\_CSA\_LEASE.ANTICIPATED\_RENT,

    IEAOWN.IE\_CSA\_LEASE.ANTI\_RENT\_PSF,

    IEAOWN.IE\_CSA\_LEASE.RENT\_ADJUSTMENTS,

    IEAOWN.IE\_CSA\_LEASE.LEASE\_SUBCATEGORY,

    IEAOWN.IE\_CSA\_LEASE.LEASE\_TYPE\_CD,

    FCD1.CD\_LONG\_NAME AS LEASE\_TYPE\_TEXT,

    IEAOWN.IE\_CSA\_LEASE.EXPENSE\_TYPE\_CD,

    FCD2.CD\_LONG\_NAME AS EXPENSE\_TYPE\_TEXT,

    IEAOWN.IE\_CSA\_LEASE.TENANCY\_CD,

    IEAOWN.IE\_CSA\_LEASE.INFO\_SOURCE\_CD,

    IEAOWN.IE\_CSA\_LEASE.LEASE\_PARKING,

    IEAOWN.IE\_CSA\_LEASE.SPRINKLER\_FL,

    IEAOWN.IE\_CSA\_LEASE.LEASE\_CREATED\_BY,

    IEAOWN.IE\_CSA\_LEASE.LEASE\_CREATE\_DT,

    IEAOWN.IE\_CSA\_LEASE.LEASE\_MODIFY\_BY,

    IEAOWN.IE\_CSA\_LEASE.LEASE\_MODIFY\_DT,

    IEAOWN.IE\_CSA\_LEASE.USE\_FOR\_COMP\_FL,

    IEAOWN.IE\_CSA\_LEASE.ENTRY\_TS,

    IEAOWN.IE\_CSA\_LEASE.ENTRY\_WORKER,

    IEAOWN.IE\_CSA\_LEASE.UPDATE\_TS,

    IEAOWN.IE\_CSA\_LEASE.UPDATE\_WORKER,

    CASE

        WHEN IEAOWN.IE\_CSA\_WKS\_INCOME.CSA\_WKS\_NUM IS NULL THEN 'N'

        ELSE 'Y'

    END AS WKS\_EXIST\_FL,

    CASE

        WHEN IEAOWN.IE\_CSA\_LEASE.CURRENT\_RENT\_PSF IS NULL THEN IEAOWN.IE\_CSA\_LEASE.ANTI\_RENT\_PSF

        ELSE IEAOWN.IE\_CSA\_LEASE.CURRENT\_RENT\_PSF

    END AS RENT\_PSF,

    CASE

        WHEN LENGTH(RSTRIP(IEAOWN.IE\_CSA\_LEASE.LEASE\_OPTION)) > 0 THEN 'Y'

        ELSE 'N'

    END AS LEASE\_OPTION\_FL,

    IEAOWN.IE\_REAL\_PROPERTY.PRINT\_PARCEL,

    STRIP(

        CASE

            IFNULL(IEAOWN.IE\_REAL\_PROPERTY.SITUS\_STREET\_NUM, '')

            WHEN '' THEN ''

            ELSE ' ' || IEAOWN.IE\_REAL\_PROPERTY.SITUS\_STREET\_NUM

        END

        || CASE

            IFNULL(IEAOWN.IE\_REAL\_PROPERTY.SITUS\_PRE\_DIRECT, '')

            WHEN '' THEN ''

            ELSE ' ' || STRIP(IEAOWN.IE\_REAL\_PROPERTY.SITUS\_PRE\_DIRECT)

        END

        || CASE

            IFNULL(IEAOWN.IE\_REAL\_PROPERTY.SITUS\_STREET\_NAME, '')

            WHEN '' THEN ''

            ELSE ' ' || IEAOWN.IE\_REAL\_PROPERTY.SITUS\_STREET\_NAME

        END

        || CASE

            IFNULL(IEAOWN.IE\_REAL\_PROPERTY.SITUS\_STREET\_SFX, '')

            WHEN '' THEN ''

            ELSE ' ' || STRIP(IEAOWN.IE\_REAL\_PROPERTY.SITUS\_STREET\_SFX)

        END

        || CASE

            IFNULL(IEAOWN.IE\_REAL\_PROPERTY.SITUS\_POST\_DIRECT, '')

            WHEN '' THEN ''

            ELSE ' ' || STRIP(IEAOWN.IE\_REAL\_PROPERTY.SITUS\_POST\_DIRECT)

        END

        || CASE

            IFNULL(IEAOWN.IE\_REAL\_PROPERTY.SITUS\_UNIT\_DESIG, '')

            WHEN '' THEN ''

            ELSE ' ' || STRIP(IEAOWN.IE\_REAL\_PROPERTY.SITUS\_UNIT\_DESIG)

        END

        || CASE

            IFNULL(IEAOWN.IE\_REAL\_PROPERTY.SITUS\_UNIT\_NUM, '')

            WHEN '' THEN ''

            ELSE ' ' || IEAOWN.IE\_REAL\_PROPERTY.SITUS\_UNIT\_NUM

        END

    ) AS address,

    'CA' AS SITUS\_STATE,

    STRIP(

        IEAOWN.IE\_REAL\_PROPERTY.SITUS\_ZIP\_CD

        || '-' || COALESCE(IEAOWN.IE\_REAL\_PROPERTY.SITUS\_ZIP\_PLUS\_4, '')

    ) AS ZIP\_CD

FROM

    IEAOWN.IE\_CSA\_LEASE

LEFT OUTER JOIN IEAOWN.IE\_FIELD\_CODE FCD1 ON IEAOWN.IE\_CSA\_LEASE.LEASE\_TYPE\_CD = FCD1.CD\_ID

LEFT OUTER JOIN IEAOWN.IE\_CSA\_WKS\_INCOME ON IEAOWN.IE\_CSA\_LEASE.LEASE\_ID = IEAOWN.IE\_CSA\_WKS\_INCOME.LEASE\_ID

LEFT OUTER JOIN IEAOWN.IE\_FIELD\_CODE FCD2 ON IEAOWN.IE\_CSA\_LEASE.EXPENSE\_TYPE\_CD = FCD2.CD\_ID,

IEAOWN.IE\_REAL\_PROPERTY

WHERE

    IEAOWN.IE\_CSA\_LEASE.PROPERTY\_ID = IEAOWN.IE\_REAL\_PROPERTY.PROPERTY\_ID

    AND IEAOWN.IE\_CSA\_LEASE.CSA\_ID = P\_CSA\_ID

ORDER BY

    IEAOWN.IE\_CSA\_LEASE.LEASE\_ID;

### Get Lease

SP: IE\_GET\_CSA\_LEASE passing LEASE\_ID

SELECT

    IEAOWN.IE\_REAL\_PROPERTY.PRINT\_PARCEL,

    IEAOWN.IE\_CSA\_LEASE.LEASE\_ID,

    IEAOWN.IE\_CSA\_LEASE.PROPERTY\_ID,

    IEAOWN.IE\_CSA\_LEASE.LEASE\_LOCATION,

    IEAOWN.IE\_CSA\_LEASE.SITUS\_CITY\_NAME,

    IEAOWN.IE\_CSA\_LEASE.LESSEE\_NAME,

    IEAOWN.IE\_CSA\_LEASE.VACANT\_FL,

    IEAOWN.IE\_CSA\_LEASE.NET\_RENTABLE\_AREA,

    IEAOWN.IE\_CSA\_LEASE.LEASE\_START\_DT,

    IEAOWN.IE\_CSA\_LEASE.LEASE\_TERM,

    IEAOWN.IE\_CSA\_LEASE.LEASE\_OPTION,

    IEAOWN.IE\_CSA\_LEASE.INITIAL\_RENT,

    IEAOWN.IE\_CSA\_LEASE.INITIAL\_RENT\_PSF,

    IEAOWN.IE\_CSA\_LEASE.STABIL\_RENT,

    IEAOWN.IE\_CSA\_LEASE.STABIL\_RENT\_PSF,

    IEAOWN.IE\_CSA\_LEASE.ANTICIPATED\_RENT,

    IEAOWN.IE\_CSA\_LEASE.USE\_FOR\_COMP\_FL,

    IEAOWN.IE\_CSA\_LEASE.ANTI\_RENT\_PSF,

    IEAOWN.IE\_CSA\_LEASE.RENT\_ADJUSTMENTS,

    IEAOWN.IE\_CSA\_LEASE.TENANT\_IMPS\_PSF,

    IEAOWN.IE\_CSA\_LEASE.LEASE\_SUBCATEGORY,

    SUBCAT.SUBCATEGORY\_NAME AS SUBCATEGORY\_NAME,

    IEAOWN.IE\_CSA\_LEASE.LEASE\_TYPE\_CD,

    FCD1.CD\_LONG\_NAME AS LEASE\_TYPE\_TEXT,

    IEAOWN.IE\_CSA\_LEASE.EXPENSE\_TYPE\_CD,

    FCD2.CD\_LONG\_NAME AS EXPENSE\_TYPE\_TEXT,

    IEAOWN.IE\_CSA\_LEASE.TENANCY\_CD,

    FCD3.CD\_LONG\_NAME AS TENANCY\_TEXT,

    IEAOWN.IE\_CSA\_LEASE.INFO\_SOURCE\_CD,

    IEAOWN.IE\_CSA\_LEASE.LEASE\_PARKING,

    IEAOWN.IE\_CSA\_LEASE.SPRINKLER\_FL,

    IEAOWN.IE\_CSA\_LEASE.LEASE\_CREATED\_BY,

    (WK1.LAST\_NAME || CASE IFNULL(WK1.FIRST\_NAME,'')

         WHEN '' THEN '' ELSE ', ' ||WK1.FIRST\_NAME END

         || CASE IFNULL(WK1.MIDDLE\_NAME,'')

         WHEN '' THEN '' ELSE ' ' ||WK1.MIDDLE\_NAME END) AS  LEASE\_CREATED\_NAME,

    IEAOWN.IE\_CSA\_LEASE.LEASE\_CREATE\_DT,

    IEAOWN.IE\_CSA\_LEASE.LEASE\_MODIFY\_BY,

    (WK2.LAST\_NAME || CASE IFNULL(WK2.FIRST\_NAME,'')

         WHEN '' THEN '' ELSE ', ' ||WK2.FIRST\_NAME END

         || CASE IFNULL(WK2.MIDDLE\_NAME,'')

         WHEN '' THEN '' ELSE ' ' ||WK2.MIDDLE\_NAME END) AS  LEASE\_MODIFY\_NAME,

    IEAOWN.IE\_CSA\_LEASE.LEASE\_MODIFY\_DT,

    IEAOWN.IE\_CSA\_LEASE.ENTRY\_TS,

    IEAOWN.IE\_CSA\_LEASE.ENTRY\_WORKER,

    IEAOWN.IE\_CSA\_LEASE.UPDATE\_TS,

    IEAOWN.IE\_CSA\_LEASE.UPDATE\_WORKER,

    IEAOWN.IE\_CSA\_LEASE.CSA\_ID,

    IEAOWN.IE\_CSA\_LEASE.USE\_CATEGORY\_CD,

    USE\_CAT.USE\_NAME AS LEASE\_USE\_NAME,

    IEAOWN.IE\_CSA\_LEASE.CURRENT\_RENT,

    IEAOWN.IE\_CSA\_LEASE.CURRENT\_RENT\_PSF,

    RTRIM(IEAOWN.IE\_CSA\_LEASE.RENT\_ADJ\_TEXT) AS RENT\_ADJ\_TEXT,

    IEAOWN.IE\_CSA\_LEASE.EXPENSE\_BASE\_YR,

    IEAOWN.IE\_CSA\_LEASE.TI\_ALLOWANCE,

    IEAOWN.IE\_CSA\_LEASE.TI\_TYPE\_CD,

    FCD4.CD\_LONG\_NAME AS TI\_TYPE\_TEXT,

    RTRIM(IEAOWN.IE\_CSA\_LEASE.LEASE\_PARKING\_2) AS LEASE\_PARKING\_2,

    RTRIM(IEAOWN.IE\_CSA\_LEASE.INFO\_SOURCE\_TEXT) AS INFO\_SOURCE\_TEXT,

    COALESCE(IEAOWN.IE\_CSA\_LEASE.SUPRV\_APPROVED\_FL,'N') AS SUPRV\_APPROVED\_FL,

    IEAOWN.IE\_CSA\_LEASE.SUPRV\_APPR\_UPD\_WKR,

    (WK3.LAST\_NAME || CASE IFNULL(WK3.FIRST\_NAME,'')

         WHEN '' THEN '' ELSE ', ' ||WK3.FIRST\_NAME END

         || CASE IFNULL(WK3.MIDDLE\_NAME,'')

         WHEN '' THEN '' ELSE ' ' ||WK3.MIDDLE\_NAME END) AS  SUPRV\_APPR\_WKR\_NAME,

    IEAOWN.IE\_CSA\_LEASE.SUPRV\_APPR\_UPD\_TS,

    IEAOWN.IE\_CSA\_LEASE\_DET.LEASE\_ID AS DetLeaseId,

    IEAOWN.IE\_CSA\_LEASE\_DET.IND\_CLR\_HGT,

    IEAOWN.IE\_CSA\_LEASE\_DET.IND\_OFFC\_AREA\_PCT,

    IEAOWN.IE\_CSA\_LEASE\_DET.IND\_LAB\_PCT,

    IEAOWN.IE\_CSA\_LEASE\_DET.IND\_MFG\_PCT,

    IEAOWN.IE\_CSA\_LEASE\_DET.IND\_WAREHOUSE\_PCT,

    IEAOWN.IE\_CSA\_LEASE\_DET.IND\_RETAIL\_PCT,

    IEAOWN.IE\_CSA\_LEASE\_DET.IND\_OTHER\_PCT,

    IEAOWN.IE\_CSA\_LEASE\_DET.OFFC\_LOAD\_FACTOR,

    IEAOWN.IE\_CSA\_LEASE\_DET.OFFC\_EXPENSE\_STOP,

    IEAOWN.IE\_CSA\_LEASE\_DET.RETAIL\_DBA,

    IEAOWN.IE\_CSA\_LEASE\_DET.RETAIL\_RENT\_PCT,

    IEAOWN.IE\_CSA\_LEASE\_DET.RENT\_BREAKPOINT,

    IEAOWN.IE\_CSA\_LEASE\_DET.RETAIL\_STORE\_OCC

FROM

    IEAOWN.IE\_CSA\_LEASE lse

LEFT OUTER JOIN

    IEAOWN.IE\_CSA\_LEASE\_DET det ON lse.LEASE\_ID = det.LEASE\_ID

LEFT OUTER JOIN

    IEAOWN.IE\_LEASE\_USE\_CAT USE\_CAT ON lse.USE\_CATEGORY\_CD = USE\_CAT.USE\_CATEGORY\_CD

LEFT OUTER JOIN

    IEAOWN.IE\_LEASE\_SUBCAT SUBCAT ON lse.LEASE\_SUBCATEGORY = SUBCAT.LEASE\_SUBCATEGORY

LEFT OUTER JOIN

    IEAOWN.IE\_FIELD\_CODE FCD1 ON lse.LEASE\_TYPE\_CD = FCD1.CD\_ID

LEFT OUTER JOIN

    IEAOWN.IE\_FIELD\_CODE FCD2 ON lse.EXPENSE\_TYPE\_CD = FCD2.CD\_ID

LEFT OUTER JOIN

    IEAOWN.IE\_FIELD\_CODE FCD3 ON lse.TENANCY\_CD = FCD3.CD\_ID

LEFT OUTER JOIN

    IEAOWN.IE\_FIELD\_CODE FCD4 ON lse.TI\_TYPE\_CD = FCD4.CD\_ID

LEFT OUTER JOIN

    IEAOWN.IE\_WORKER WK1 ON WK1.WORKER\_ID=lse.LEASE\_CREATED\_BY

LEFT OUTER JOIN

    IEAOWN.IE\_WORKER WK2 ON WK2.WORKER\_ID=lse.LEASE\_MODIFY\_BY

LEFT OUTER JOIN

    IEAOWN.IE\_WORKER WK3 ON WK3.WORKER\_ID=lse.SUPRV\_APPR\_UPD\_WKR

LEFT OUTER JOIN

    IEAOWN.IE\_REAL\_PROPERTY ON IEAOWN.IE\_CSA\_LEASE.PROPERTY\_ID = IEAOWN.IE\_REAL\_PROPERTY.PROPERTY\_ID

WHERE

    IEAOWN.IE\_CSA\_LEASE.LEASE\_ID = P\_LEASE\_ID

### Get Expenses

Get FULL\_EXPENSES\_FL, TOT\_BUILDING\_AREA, TOT\_NET\_RENT\_AREA, CSA\_NET\_RENT\_AREA store them to CSASaleExpenses modal.

SP: IE\_GET\_CSA\_SALE\_INFO\_FULL (passing CSA\_ID)

Use list\_of\_expenses from CSASALEExpenses modal to store the result of the below SP.

SP: IE\_GET\_CSA\_EXPENSE\_CODE (passing CSA\_ID)

SELECT

    cmc.AMOUNT\_CD AS CMC\_AMT\_CD,

    cmc.SORT\_SEQ,

    cmc.AMOUNT\_TYPE AS CMC\_AMT\_TYPE,

    cmc.AMOUNT\_DESCRIPTION AS CMC\_AMT\_DESC,

    cmc.UPDATE\_DESC\_FL AS CMC\_UPDATE\_DESC\_FL,

    cam.CSA\_ID,

    cam.AMOUNT\_CD AS CAM\_AMT\_CD,

    cam.CSA\_AMOUNT\_SEQ\_NUM,

    cam.AMOUNT\_TYPE AS CAM\_AMT\_TYPE,

    cam.AMOUNT\_DESCRIPTION AS CAM\_AMT\_DESC,

    cam.UPDATE\_DESC\_FL AS CAM\_UPDATE\_DESC\_FL,

    cam.AMOUNT\_OWNERS,

    cam.AMOUNT\_TENANT

FROM

    IEAOWN.IE\_CSA\_AMOUNT\_CODE cmc

LEFT OUTER JOIN

    IEAOWN.IE\_CSA\_AMOUNT cam ON cmc.AMOUNT\_CD = cam.AMOUNT\_CD AND cam.CSA\_ID = **P\_CSA\_ID**

WHERE

    cmc.AMOUNT\_TYPE = 'E'

    AND cmc.AMOUNT\_CD <> 15

ORDER BY

    cmc.SORT\_SEQ;

### Get Adjustments

SP: IE\_GET\_CSA\_ADJ\_FOR\_ALL\_ADJ\_CODES

SELECT   
    IEAOWN.IE\_CSA\_AMOUNT\_CODE.AMOUNT\_CD AS cmc\_amt\_cd,  
    IEAOWN.IE\_CSA\_AMOUNT\_CODE.SORT\_SEQ,  
    IEAOWN.IE\_CSA\_AMOUNT\_CODE.AMOUNT\_TYPE AS cmc\_amt\_type,  
    IEAOWN.IE\_CSA\_AMOUNT\_CODE.AMOUNT\_DESCRIPTION AS cmc\_amt\_desc,  
    IEAOWN.IE\_CSA\_AMOUNT\_CODE.UPDATE\_DESC\_FL AS cmc\_update\_desc\_fl,  
    IEAOWN.IE\_CSA\_AMOUNT.CSA\_ID,  
    IEAOWN.IE\_CSA\_AMOUNT.AMOUNT\_CD AS cam\_amt\_cd,  
    IEAOWN.IE\_CSA\_AMOUNT.CSA\_AMOUNT\_SEQ\_NUM,  
    IEAOWN.IE\_CSA\_AMOUNT.AMOUNT\_TYPE AS cam\_amt\_type,  
    IEAOWN.IE\_CSA\_AMOUNT.AMOUNT\_DESCRIPTION AS cam\_amt\_desc,  
    IEAOWN.IE\_CSA\_AMOUNT.UPDATE\_DESC\_FL AS cam\_update\_desc\_fl,  
    IEAOWN.IE\_CSA\_AMOUNT.AMOUNT\_CSA  
FROM   
    IEAOWN.IE\_CSA\_AMOUNT\_CODE cmc  
LEFT OUTER JOIN   
    IEAOWN.IE\_CSA\_AMOUNT cam   
ON     
    cmc.AMOUNT\_CD = cam.AMOUNT\_CD   
    AND cam.CSA\_ID = P\_CSA\_ID;  
WHERE   
    IEAOWN.IE\_CSA\_AMOUNT\_CODE.AMOUNT\_TYPE = 'A'  
ORDER BY   
    IEAOWN.IE\_CSA\_AMOUNT\_CODE.SORT\_SEQ;

### Get Add Lease

### Get Expenses Total

SP: IE\_CSA\_GET\_EXPENSE\_TOTAL passing in CSA\_ID

SELECT

    SUM(amount\_owners) AS tot\_expense\_owner,

    SUM(amount\_tenant) AS tot\_expense\_tenant,

    SUM(ISNULL(amount\_owners, 0) + ISNULL(amount\_tenant, 0)) AS tot\_expenses

FROM

    ieaown.ie\_csa\_amount

WHERE

    amount\_type = 'E'

    AND amount\_cd <= 14

    AND csa\_id = P\_CSA\_ID;

### Get Sources

Tables:

IE\_CSA\_SOURCE css

IE\_CSA\_SALE\_INFO csi

IE\_FIELD\_CODE fcd

SP: IE\_CSA\_GET\_SOURCE passing in CSA\_ID

SELECT

    css.CSA\_ID,

    css.SOURCE\_CD\_PRI,

    css.SOURCE\_NAME\_PRI,

    css.SOURCE\_TITLE\_PRI,

    css.SOURCE\_COMPANY\_PRI,

    css.SOURCE\_PHONE\_PRI,

    css.SOURCE\_CD\_SEC,

    css.SOURCE\_NAME\_SEC,

    css.SOURCE\_TITLE\_SEC,

    css.SOURCE\_COMPANY\_SEC,

    css.SOURCE\_PHONE\_SEC,

    css.SOURCE\_OTHER\_DESC,

    css.SOURCE\_CREATED\_BY,

    css.SOURCE\_CREATE\_DT,

    css.SOURCE\_MODIFIED\_BY,

    css.SOURCE\_MODIFIED\_DT,

    css.ENTRY\_TS,

    css.ENTRY\_WORKER,

    css.UPDATE\_TS,

    css.UPDATE\_WORKER,

    css.SRCE\_PH\_EX\_PRI,

    css.SRCE\_ALT\_PH\_PRI,

    css.SRCE\_ALT\_PH\_EX\_PRI,

    css.SRCE\_EMAIL\_PRI,

    css.SRCE\_PH\_EX\_SEC,

    css.SRCE\_ALT\_PH\_SEC,

    css.SRCE\_ALT\_PH\_EX\_SEC,

    css.SRCE\_EMAIL\_SEC,

    CASE css.SRCE\_IQ\_FL WHEN 'Y' THEN '1' ELSE '0' END AS SRCE\_IQ\_FL,

    CASE css.SRCE\_AAB\_FL WHEN 'Y' THEN '1' ELSE '0' END AS SRCE\_AAB\_FL,

    CASE css.SRCE\_PCOR\_COS\_FL WHEN 'Y' THEN '1' ELSE '0' END AS SRCE\_PCOR\_COS\_FL,

    CASE css.SRCE\_RFR\_FL WHEN 'Y' THEN '1' ELSE '0' END AS SRCE\_RFR\_FL,

    fcd.cd\_short\_name,

    '' AS source\_desc\_Sec,

    '' AS cmp\_created\_by,

    '' AS cmp\_modified\_by,

    css.SRCE\_MODIFY\_RSN\_CD,

    csi.RELEASE\_DT,

    csi.SUPRV\_APPR\_UPD\_WKR,

    csi.SUPRV\_APPR\_UPD\_TS,

    csi.SUPRV\_APPROVED\_FL,

    CASE csi.SUPRV\_APPROVED\_FL WHEN 'Y' THEN 'Yes' ELSE 'No' END AS SUPRV\_APPR\_TEXT

FROM

    ieaown.ie\_csa\_source css

LEFT OUTER JOIN

    ieaown.ie\_field\_code fcd ON fcd.cd\_id = css.source\_cd\_pri,

    ieaown.ie\_csa\_sale\_info csi

WHERE

    css.CSA\_ID = P\_CSA\_ID

    AND csi.CSA\_ID = css.CSA\_ID;

### Get Income and Analysis & Value Ind

SP:

IE\_GET\_CSA\_INCOME\_ANALYSIS passing in CSA\_ID

IE\_GET\_CSA\_TAX\_RATE

IE\_GET\_CSA\_PCT\_OCCUP\_THRESHLD

IE\_GET\_CSA\_EXPENSE\_TOTAL

IE\_GET\_CSA\_BENCHMARK\_RATING\_DESC

SELECT

    csa.csa\_id,

    csa.pct\_pgi,

    csa.addition\_net\_incom,

    csa.tenant\_reimburse,

    csa.anti\_property\_tax,

    csa.other\_taxes\_desc,

    csa.other\_taxes\_amount,

    csa.tax\_rate,

    csa.csa\_net\_rent\_area,

    csa.pct\_occupancy,

    csa.pct\_occup\_minimum,

    csa.update\_ts,

    csa.update\_worker,

    csi.property\_id,

    csi.full\_expenses\_fl,

    csi.tot\_net\_rent\_area,

    csi.tot\_building\_area,

    csi.benchmark\_rate\_cd,

    csi.pct\_owner\_occup,

    chg.event\_ts,

    chg.adj\_sales\_price,

    chg.ind\_pur\_price,

    bm\_desc.cd\_long\_name AS bm\_desc,

    '   ' AS cmp\_OAR\_desc,

    0 AS cmp\_pot\_gross\_inc,

    0 AS cmp\_vac\_coll\_loss,

    0 AS cmp\_eff\_gross\_inc,

    0 AS cmp\_tot\_expenses,

    0 AS cmp\_net\_op\_inc,

    0 AS cmp\_egi\_pct,

    0 AS cmp\_noi\_adj\_sale,

    0 AS cmp\_adj\_sale\_pgi,

    0 AS cmp\_adj\_sale\_nra,

    0 AS cmp\_rent\_nra,

    0 AS cmp\_noi\_nra,

    0 AS cmp\_expense\_nra,

    0 AS cmp\_tot\_xpens\_nra,

    0 AS pct\_occup\_threshld

FROM

    ieaown.ie\_csa\_analysis csa

INNER JOIN

    ieaown.ie\_chg\_owner chg ON csa.csa\_id = chg.csa\_id

INNER JOIN

    ieaown.ie\_csa\_sale\_info csi ON csa.csa\_id = csi.csa\_id

LEFT OUTER JOIN

    ieaown.ie\_field\_code bm\_desc ON bm\_desc.cd\_id = csi.benchmark\_rate\_cd

WHERE

    csa.csa\_id = P\_CSA\_ID

    AND csi.doc\_prefix = chg.doc\_prefix

    AND csi.doc\_series = chg.doc\_series;

#### IE\_GET\_CSA\_TAX\_RATE passing in Property\_ID and Roll\_Year

Tables:

IE\_TAX\_RATE

IE\_TRA\_HISTORY

SELECT

IEAOWN.IE\_TAX\_RATE.TAX\_RATE

FROM

IEAOWN.IE\_TAX\_RATE

INNER JOIN

IEAOWN.IE\_TRA\_HISTORY ON IEAOWN.IE\_TAX\_RATE.TRA\_PRIME = IEAOWN.IE\_TRA\_HISTORY.TRA\_PRIME

AND IEAOWN.IE\_TAX\_RATE.TRA\_SEC = IEAOWN.IE\_TRA\_HISTORY.TRA\_SEC

WHERE

IEAOWN.IE\_TRA\_HISTORY.PROPERTY\_ID = P\_PROPERTY\_ID

AND IEAOWN.IE\_TAX\_RATE.ROLL\_YR = P\_ROLL\_YR;

#### IE\_GET\_CSA\_PCT\_OCCUP\_THRESHLD

SELECT

    pct\_occup\_threshld

FROM

    IEAOWN.IE\_GLOBAL\_CONTROL;

#### IE\_GET\_CSA\_EXPENSE\_TOTAL passing in CSA\_ID

SELECT

SUM(amount\_owners) AS tot\_expense\_owner,

SUM(amount\_tenant) AS tot\_expense\_tenant,

SUM(IFNULL(amount\_owners, 0) + IFNULL(amount\_tenant, 0)) AS tot\_expenses

FROM

ieaown.ie\_csa\_amount

WHERE

amount\_type = 'E'

AND amount\_cd <= 14

AND csa\_id = P\_CSA\_ID

#### IE\_GET\_CSA\_BENCHMARK\_RATING\_DESC

Value: [See Benchmark Rating Drop Down](#_Benchmark_Rating_Drop)

### Get Comments

Table:

IE\_CSA\_Comment

SP: IE\_GET\_CSA\_COMMENTS passing in CSA\_ID

SELECT csa\_id, seq\_num, STRIP(comment\_text) AS comment\_text, entry\_ts, entry\_worker, update\_ts, update\_worker

FROM ieaown.ie\_csa\_comment

WHERE csa\_id = P\_CSA\_ID

ORDER BY seq\_num ASC;

### Get Income Expense Analysis – Report

SELECT

    ANA.CSA\_ID,

    ANA.PCT\_PGI,

    ANA.ADDITION\_NET\_INCOM,

    ANA.TENANT\_REIMBURSE,

    ANA.ANTI\_PROPERTY\_TAX,

    ANA.OTHER\_TAXES\_DESC,

    ANA.OTHER\_TAXES\_AMOUNT,

    ANA.TAX\_RATE,

    ANA.PCT\_OCCUPANCY,

    ANA.PCT\_OCCUP\_MINIMUM,

    ANA.ENTRY\_TS,

    ANA.ENTRY\_WORKER,

    ANA.UPDATE\_TS,

    ANA.UPDATE\_WORKER,

    ANA.CSA\_NET\_RENT\_AREA,

    LEASE.PGI,

    AMOUNT1.EXP\_OWNERS\_SUBTOTL,

    AMOUNT1.EXP\_TENANT\_SUBTOTL,

    AMOUNT2.EXP\_OWNERS\_TOTAL,

    AMOUNT2.EXP\_TENANT\_TOTAL,

    AMOUNT3.CSA\_ADJUST\_TOTAL

FROM

    IEAOWN.IE\_CSA\_ANALYSIS ANA

LEFT OUTER JOIN

    (

    SELECT

        CSA\_ID,

        (IFNULL(SUM(CURRENT\_RENT), 0) + IFNULL(SUM(ANTICIPATED\_RENT), 0)) \* 12 AS PGI

    FROM

        IEAOWN.IE\_CSA\_LEASE

    WHERE

        CSA\_ID = P\_CSA\_ID

    GROUP BY

        CSA\_ID

    ) LEASE ON ANA.CSA\_ID = LEASE.CSA\_ID

JOIN

    (

    SELECT

        CSA\_ID,

        IFNULL(SUM(AMOUNT\_OWNERS), 0) AS EXP\_OWNERS\_SUBTOTL,

        IFNULL(SUM(AMOUNT\_TENANT), 0) AS EXP\_TENANT\_SUBTOTL

    FROM

        IEAOWN.IE\_CSA\_AMOUNT

    WHERE

        CSA\_ID = P\_CSA\_ID

        AND CSA\_AMOUNT\_SEQ\_NUM < 14

    GROUP BY

        CSA\_ID

    ) AMOUNT1 ON ANA.CSA\_ID = AMOUNT1.CSA\_ID

JOIN

    (

    SELECT

        CSA\_ID,

        IFNULL(SUM(AMOUNT\_OWNERS), 0) AS EXP\_OWNERS\_TOTAL,

        IFNULL(SUM(AMOUNT\_TENANT), 0) AS EXP\_TENANT\_TOTAL

    FROM

        IEAOWN.IE\_CSA\_AMOUNT

    WHERE

        CSA\_ID = P\_CSA\_ID

    GROUP BY

        CSA\_ID

    ) AMOUNT2 ON ANA.CSA\_ID = AMOUNT2.CSA\_ID

JOIN

    (

    SELECT

        CSA\_ID,

        IFNULL(SUM(AMOUNT\_CSA), 0) AS CSA\_ADJUST\_TOTAL

    FROM

        IEAOWN.IE\_CSA\_AMOUNT

    WHERE

        CSA\_ID = P\_CSA\_ID

        AND AMOUNT\_CD IN (20, 22, 23)

    GROUP BY

        CSA\_ID

    ) AMOUNT3 ON ANA.CSA\_ID = AMOUNT3.CSA\_ID

WHERE

    ANA.CSA\_ID = AMOUNT1.CSA\_ID

    AND ANA.CSA\_ID = AMOUNT2.CSA\_ID

    AND ANA.CSA\_ID = AMOUNT3.CSA\_ID

    AND ANA.CSA\_ID = P\_CSA\_ID;

### Get Lease Info – Report

SP: IE\_GET\_CSA\_LEASE\_INFO (passing CSA ID)

SELECT DISTINCT

    IEAOWN.IE\_CSA\_LEASE.LEASE\_ID,

    IEAOWN.IE\_CSA\_LEASE.CSA\_ID,

    IEAOWN.IE\_CSA\_LEASE.PROPERTY\_ID,

    IEAOWN.IE\_CSA\_LEASE.LEASE\_LOCATION,

    IEAOWN.IE\_CSA\_LEASE.SITUS\_CITY\_NAME,

    IEAOWN.IE\_CSA\_LEASE.LESSEE\_NAME,

    IEAOWN.IE\_CSA\_LEASE.VACANT\_FL,

    IEAOWN.IE\_CSA\_LEASE.NET\_RENTABLE\_AREA,

    IEAOWN.IE\_CSA\_LEASE.LEASE\_START\_DT,

    IEAOWN.IE\_CSA\_LEASE.LEASE\_TERM,

    IEAOWN.IE\_CSA\_LEASE.LEASE\_OPTION,

    IEAOWN.IE\_CSA\_LEASE.INITIAL\_RENT,

    IEAOWN.IE\_CSA\_LEASE.INITIAL\_RENT\_PSF,

    IEAOWN.IE\_CSA\_LEASE.STABIL\_RENT,

    IEAOWN.IE\_CSA\_LEASE.STABIL\_RENT\_PSF,

    IEAOWN.IE\_CSA\_LEASE.CURRENT\_RENT,

    IEAOWN.IE\_CSA\_LEASE.CURRENT\_RENT\_PSF,

    IEAOWN.IE\_CSA\_LEASE.ANTICIPATED\_RENT,

    IEAOWN.IE\_CSA\_LEASE.ANTI\_RENT\_PSF,

    IEAOWN.IE\_CSA\_LEASE.RENT\_ADJUSTMENTS,

    IEAOWN.IE\_CSA\_LEASE.LEASE\_SUBCATEGORY,

    IEAOWN.IE\_CSA\_LEASE.LEASE\_TYPE\_CD,

    FCD1.CD\_LONG\_NAME AS LEASE\_TYPE\_TEXT,

    IEAOWN.IE\_CSA\_LEASE.EXPENSE\_TYPE\_CD,

    FCD2.CD\_LONG\_NAME AS EXPENSE\_TYPE\_TEXT,

    IEAOWN.IE\_CSA\_LEASE.TENANCY\_CD,

    IEAOWN.IE\_CSA\_LEASE.INFO\_SOURCE\_CD,

    IEAOWN.IE\_CSA\_LEASE.LEASE\_PARKING,

    IEAOWN.IE\_CSA\_LEASE.SPRINKLER\_FL,

    IEAOWN.IE\_CSA\_LEASE.LEASE\_CREATED\_BY,

    IEAOWN.IE\_CSA\_LEASE.LEASE\_CREATE\_DT,

    IEAOWN.IE\_CSA\_LEASE.LEASE\_MODIFY\_BY,

    IEAOWN.IE\_CSA\_LEASE.LEASE\_MODIFY\_DT,

    IEAOWN.IE\_CSA\_LEASE.USE\_FOR\_COMP\_FL,

    IEAOWN.IE\_CSA\_LEASE.ENTRY\_TS,

    IEAOWN.IE\_CSA\_LEASE.ENTRY\_WORKER,

    IEAOWN.IE\_CSA\_LEASE.UPDATE\_TS,

    IEAOWN.IE\_CSA\_LEASE.UPDATE\_WORKER,

    CASE

        WHEN IEAOWN.IE\_CSA\_WKS\_INCOME.CSA\_WKS\_NUM IS NULL THEN 'N'

        ELSE 'Y'

    END AS WKS\_EXIST\_FL,

    CASE

        WHEN IEAOWN.IE\_CSA\_LEASE.CURRENT\_RENT\_PSF IS NULL THEN IEAOWN.IE\_CSA\_LEASE.ANTI\_RENT\_PSF

        ELSE IEAOWN.IE\_CSA\_LEASE.CURRENT\_RENT\_PSF

    END AS RENT\_PSF,

    CASE

        WHEN LENGTH(RSTRIP(IEAOWN.IE\_CSA\_LEASE.LEASE\_OPTION)) > 0 THEN 'Y'

        ELSE 'N'

    END AS LEASE\_OPTION\_FL,

    IEAOWN.IE\_REAL\_PROPERTY.PRINT\_PARCEL,

    STRIP(

        CASE

            IFNULL(IEAOWN.IE\_REAL\_PROPERTY.SITUS\_STREET\_NUM, '')

            WHEN '' THEN ''

            ELSE ' ' || IEAOWN.IE\_REAL\_PROPERTY.SITUS\_STREET\_NUM

        END

        || CASE

            IFNULL(IEAOWN.IE\_REAL\_PROPERTY.SITUS\_PRE\_DIRECT, '')

            WHEN '' THEN ''

            ELSE ' ' || STRIP(IEAOWN.IE\_REAL\_PROPERTY.SITUS\_PRE\_DIRECT)

        END

        || CASE

            IFNULL(IEAOWN.IE\_REAL\_PROPERTY.SITUS\_STREET\_NAME, '')

            WHEN '' THEN ''

            ELSE ' ' || IEAOWN.IE\_REAL\_PROPERTY.SITUS\_STREET\_NAME

        END

        || CASE

            IFNULL(IEAOWN.IE\_REAL\_PROPERTY.SITUS\_STREET\_SFX, '')

            WHEN '' THEN ''

            ELSE ' ' || STRIP(IEAOWN.IE\_REAL\_PROPERTY.SITUS\_STREET\_SFX)

        END

        || CASE

            IFNULL(IEAOWN.IE\_REAL\_PROPERTY.SITUS\_POST\_DIRECT, '')

            WHEN '' THEN ''

            ELSE ' ' || STRIP(IEAOWN.IE\_REAL\_PROPERTY.SITUS\_POST\_DIRECT)

        END

        || CASE

            IFNULL(IEAOWN.IE\_REAL\_PROPERTY.SITUS\_UNIT\_DESIG, '')

            WHEN '' THEN ''

            ELSE ' ' || STRIP(IEAOWN.IE\_REAL\_PROPERTY.SITUS\_UNIT\_DESIG)

        END

        || CASE

            IFNULL(IEAOWN.IE\_REAL\_PROPERTY.SITUS\_UNIT\_NUM, '')

            WHEN '' THEN ''

            ELSE ' ' || IEAOWN.IE\_REAL\_PROPERTY.SITUS\_UNIT\_NUM

        END

    ) AS address,

    'CA' AS SITUS\_STATE,

    STRIP(

        IEAOWN.IE\_REAL\_PROPERTY.SITUS\_ZIP\_CD

        || '-' || COALESCE(IEAOWN.IE\_REAL\_PROPERTY.SITUS\_ZIP\_PLUS\_4, '')

    ) AS ZIP\_CD

FROM

    IEAOWN.IE\_CSA\_LEASE

LEFT OUTER JOIN IEAOWN.IE\_FIELD\_CODE FCD1 ON IEAOWN.IE\_CSA\_LEASE.LEASE\_TYPE\_CD = FCD1.CD\_ID

LEFT OUTER JOIN IEAOWN.IE\_CSA\_WKS\_INCOME ON IEAOWN.IE\_CSA\_LEASE.LEASE\_ID = IEAOWN.IE\_CSA\_WKS\_INCOME.LEASE\_ID

LEFT OUTER JOIN IEAOWN.IE\_FIELD\_CODE FCD2 ON IEAOWN.IE\_CSA\_LEASE.EXPENSE\_TYPE\_CD = FCD2.CD\_ID,

IEAOWN.IE\_REAL\_PROPERTY

WHERE

    IEAOWN.IE\_CSA\_LEASE.PROPERTY\_ID = IEAOWN.IE\_REAL\_PROPERTY.PROPERTY\_ID

    AND IEAOWN.IE\_CSA\_LEASE.CSA\_ID = P\_CSA\_ID

ORDER BY

    IEAOWN.IE\_CSA\_LEASE.LEASE\_ID;

### Get CSA Expense – Report

SP: IE\_GET\_CSA\_EXPENSE passing CSA\_ID

SELECT

    AMT.CSA\_ID,

    AMT.CSA\_AMOUNT\_SEQ\_NUM,

    AMT.AMOUNT\_TYPE,

    AMT.AMOUNT\_CD,

    CASE

        WHEN AMTCD.UPDATE\_DESC\_FL = 'Y' THEN AMT.AMOUNT\_DESCRIPTION

        ELSE AMTCD.AMOUNT\_DESCRIPTION

    END AS AMT\_DISPLAY\_TEXT,

    AMT.AMOUNT\_OWNERS,

    CASE

        WHEN CSAANA.CSA\_NET\_RENT\_AREA > 0 THEN AMT.AMOUNT\_OWNERS / CSAANA.CSA\_NET\_RENT\_AREA

        ELSE

            CASE

                WHEN SALEINFO.TOT\_BUILDING\_AREA > 0 THEN AMT.AMOUNT\_OWNERS / SALEINFO.TOT\_BUILDING\_AREA

                ELSE NULLIF(0.0, 0.0)

            END

    END AS OWNER\_DLR\_PER\_SQFT,

    AMT.AMOUNT\_TENANT,

    CASE

        WHEN CSAANA.CSA\_NET\_RENT\_AREA > 0 THEN AMT.AMOUNT\_TENANT / CSAANA.CSA\_NET\_RENT\_AREA

        ELSE

            CASE

                WHEN SALEINFO.TOT\_BUILDING\_AREA > 0 THEN AMT.AMOUNT\_TENANT / SALEINFO.TOT\_BUILDING\_AREA

                ELSE NULLIF(0.0, 0.0)

            END

    END AS TENT\_DLR\_PER\_SQFT,

    AMT.AMOUNT\_CSA,

    AMT.UPDATE\_DESC\_FL,

    CASE

        WHEN AMT.AMOUNT\_CD < 14 THEN '1'

        ELSE '2'

    END AS GROUP\_BY\_TYPE,

    AMT.ENTRY\_TS,

    AMT.ENTRY\_WORKER,

    AMT.UPDATE\_TS,

    AMT.UPDATE\_WORKER,

    SALEINFO.TOT\_BUILDING\_AREA,

    SALEINFO.TOT\_NET\_RENT\_AREA,

    CSAANA.CSA\_NET\_RENT\_AREA

FROM

    IEAOWN.IE\_CSA\_AMOUNT AMT,

    IEAOWN.IE\_CSA\_SALE\_INFO SALEINFO,

    IEAOWN.IE\_CSA\_ANALYSIS CSAANA,

    IEAOWN.IE\_CSA\_AMOUNT\_CODE AMTCD

WHERE

    SALEINFO.CSA\_ID = AMT.CSA\_ID

    AND SALEINFO.CSA\_ID = CSAANA.CSA\_ID

    AND AMT.AMOUNT\_CD = AMTCD.AMOUNT\_CD

    AND AMTCD.AMOUNT\_TYPE = 'E'

    AND AMT.CSA\_ID = @CSAId

ORDER BY

    AMTCD.SORT\_SEQ;

### Get CSA Sources – Report

SP: IE\_GET\_CSA\_RPT\_SOURCE passing CSA\_ID

SELECT

    CSS.CSA\_ID,

    CSS.SOURCE\_CD\_PRI,

    CSS.SOURCE\_NAME\_PRI,

    CSS.SOURCE\_TITLE\_PRI,

    CSS.SOURCE\_COMPANY\_PRI,

    CSS.SOURCE\_PHONE\_PRI,

    CSS.SOURCE\_CD\_SEC,

    CSS.SOURCE\_NAME\_SEC,

    CSS.SOURCE\_TITLE\_SEC,

    CSS.SOURCE\_COMPANY\_SEC,

    CSS.SOURCE\_PHONE\_SEC,

    CSS.SOURCE\_OTHER\_DESC,

    CSS.SRCE\_IQ\_FL,

    CSS.SRCE\_AAB\_FL,

    CSS.SRCE\_PCOR\_COS\_FL,

    CSS.SRCE\_RFR\_FL,

    CSS.SRCE\_PH\_EX\_PRI,

    CSS.SRCE\_ALT\_PH\_PRI,

    CSS.SRCE\_ALT\_PH\_EX\_PRI,

    CSS.SRCE\_EMAIL\_PRI,

    CSS.SRCE\_PH\_EX\_SEC,

    CSS.SRCE\_ALT\_PH\_SEC,

    CSS.SRCE\_ALT\_PH\_EX\_SEC,

    CSS.SRCE\_EMAIL\_SEC,

    CSS.SOURCE\_CREATED\_BY,

    CSS.SOURCE\_CREATE\_DT,

    CSS.SOURCE\_MODIFIED\_BY,

    CSS.SOURCE\_MODIFIED\_DT,

    CSS.ENTRY\_TS,

    CSS.ENTRY\_WORKER,

    CSS.UPDATE\_TS,

    CSS.UPDATE\_WORKER,

    CSS.SRCE\_MODIFY\_RSN\_CD,

    FCD1.CD\_LONG\_NAME AS SOURCE\_PRI\_TEXT,

    FCD2.CD\_LONG\_NAME AS SOURCE\_SEC\_TEXT,

    FCD3.CD\_LONG\_NAME AS MODIFY\_RSN\_TEXT,

    (WK1.LAST\_NAME || CASE IFNULL(WK1.FIRST\_NAME, '')

        WHEN '' THEN '' ELSE ', ' || WK1.FIRST\_NAME END

        || CASE IFNULL(WK1.MIDDLE\_NAME, '')

            WHEN '' THEN '' ELSE ' ' || WK1.MIDDLE\_NAME END) AS CREATED\_WORKER,

    (WK2.LAST\_NAME || CASE IFNULL(WK2.FIRST\_NAME, '')

        WHEN '' THEN '' ELSE ', ' || WK2.FIRST\_NAME END

        || CASE IFNULL(WK2.MIDDLE\_NAME, '')

            WHEN '' THEN '' ELSE ' ' || WK2.MIDDLE\_NAME END) AS MODIFIED\_WORKER

FROM

    IEAOWN.IE\_CSA\_SOURCE CSS

LEFT OUTER JOIN

    IEAOWN.IE\_FIELD\_CODE FCD1 ON FCD1.CD\_ID = CSS.SOURCE\_CD\_PRI

LEFT OUTER JOIN

    IEAOWN.IE\_FIELD\_CODE FCD2 ON FCD2.CD\_ID = CSS.SOURCE\_CD\_SEC

LEFT OUTER JOIN

    IEAOWN.IE\_FIELD\_CODE FCD3 ON FCD3.CD\_ID = CSS.SRCE\_MODIFY\_RSN\_CD

LEFT OUTER JOIN

    IEAOWN.IE\_WORKER WK1 ON WK1.WORKER\_ID = CSS.SOURCE\_CREATED\_BY

LEFT OUTER JOIN

    IEAOWN.IE\_WORKER WK2 ON WK2.WORKER\_ID = CSS.SOURCE\_MODIFIED\_BY

WHERE

    CSS.CSA\_ID = P\_CSA\_ID;

### Get Adjustments – Report

SP: IE\_GET\_CSA\_RPT\_ADJ passing CSA\_ID

SELECT

    AMT.CSA\_ID,

    AMTCD.SORT\_SEQ,

    '' AS LEFT\_ROW\_NO,

    CASE AMT.AMOUNT\_CD

        WHEN 16 THEN '(a)'

        WHEN 17 THEN '(b)'

        WHEN 18 THEN '(c)'

        WHEN 19 THEN '(d)'

        WHEN 20 THEN '(f)'

        WHEN 22 THEN '(g)'

        WHEN 23 THEN '(h)'

    END AS RIGHT\_ROW\_NO,

    AMT.CSA\_AMOUNT\_SEQ\_NUM,

    AMT.AMOUNT\_CD,

    AMT.AMOUNT\_DESCRIPTION AS AMT\_TEXT,

    AMTCD.AMOUNT\_DESCRIPTION AS AMTCD\_TEXT,

    CASE

        WHEN AMTCD.UPDATE\_DESC\_FL = 'Y' THEN AMT.AMOUNT\_DESCRIPTION

        ELSE ''

    END AS AMT\_DISPLAY\_TEXT,

    CASE

        WHEN AMTCD.AMOUNT\_CD = 21 THEN NULLIF(0, 0)

        ELSE AMT.AMOUNT\_CSA

    END AS AMOUNT\_CSA\_LEFT,

    AMT.AMOUNT\_CSA AS AMOUNT\_CSA,

    CASE

        WHEN AMT.AMOUNT\_CD = 21 THEN 'BONDS'

        ELSE 'ADJ'

    END AS ROW\_TYPE

FROM

    IEAOWN.IE\_CSA\_AMOUNT AMT,

    IEAOWN.IE\_CSA\_AMOUNT\_CODE AMTCD

WHERE

    AMT.AMOUNT\_CD = AMTCD.AMOUNT\_CD

    AND AMTCD.AMOUNT\_TYPE = 'A'

    AND AMT.CSA\_ID = P\_CSA\_ID

UNION

SELECT

    AMT.CSA\_ID,

    5 AS SORT\_SEQ,

    '(e)' AS LEFT\_ROW\_NO,

    'Total (a thru d)' AS RIGHT\_ROW\_NO,

    0 AS CSA\_AMOUNT\_SEQ\_NUM,

    0 AS AMOUNT\_CD,

    '' AS AMT\_TEXT,

    'Ind Pur Price' AS AMTCD\_TEXT,

    '' AS AMT\_DISPLAY\_TEXT,

    NULLIF(0, 0) AS AMOUNT\_CSA\_LEFT,

    SUM(AMT.AMOUNT\_CSA) AS AMOUNT\_CSA,

    'PUR' AS ROW\_TYPE

FROM

    IEAOWN.IE\_CSA\_AMOUNT AMT,

    IEAOWN.IE\_CSA\_AMOUNT\_CODE AMTCD

WHERE

    AMT.AMOUNT\_CD = AMTCD.AMOUNT\_CD

    AND AMTCD.AMOUNT\_CD IN (16, 17, 18, 19)

    AND AMT.CSA\_ID = P\_CSA\_ID

GROUP BY

    AMT.CSA\_ID

UNION

SELECT

    AMT.CSA\_ID,

    5.5 AS SORT\_SEQ,

    '(e)' AS LEFT\_ROW\_NO,

    '(e)' AS RIGHT\_ROW\_NO,

    0 AS CSA\_AMOUNT\_SEQ\_NUM,

    0 AS AMOUNT\_CD,

    '' AS AMT\_TEXT,

    'PCOR Ind Pur Price' AS AMTCD\_TEXT,

    '' AS AMT\_DISPLAY\_TEXT,

    NULLIF(0, 0) AS AMOUNT\_CSA\_LEFT,

    CO.IND\_PUR\_PRICE AS AMOUNT\_CSA,

    'PUR' AS ROW\_TYPE

FROM

    IEAOWN.IE\_CSA\_AMOUNT AMT,

    IEAOWN.IE\_CSA\_SALE\_INFO CSI,

    IEAOWN.IE\_CHG\_OWNER CO

WHERE

    CSI.DOC\_PREFIX = CO.DOC\_PREFIX

    AND CSI.DOC\_SERIES = CO.DOC\_SERIES

    AND AMT.CSA\_ID = CSI.CSA\_ID

    AND AMT.CSA\_ID = P\_CSA\_ID

UNION

SELECT

    AMT.CSA\_ID,

    11 AS SORT\_SEQ,

    '(i)' AS LEFT\_ROW\_NO,

    'Total (e thru h)' AS RIGHT\_ROW\_NO,

    0 AS CSA\_AMOUNT\_SEQ\_NUM,

    0 AS AMOUNT\_CD,

    '' AS AMT\_TEXT,

    'Adj Sales Price' AS AMTCD\_TEXT,

    '' AS AMT\_DISPLAY\_TEXT,

    NULLIF(0, 0) AS AMOUNT\_CSA\_LEFT,

    SUM(AMT.AMOUNT\_CSA) AS AMOUNT\_CSA,

    'SALES' AS ROW\_TYPE

FROM

    IEAOWN.IE\_CSA\_AMOUNT AMT,

    IEAOWN.IE\_CSA\_AMOUNT\_CODE AMTCD

WHERE

    AMT.AMOUNT\_CD = AMTCD.AMOUNT\_CD

    AND AMTCD.AMOUNT\_CD IN (20, 22, 23)

    AND AMT.CSA\_ID = P\_CSA\_ID

GROUP BY

    AMT.CSA\_ID

ORDER BY

    SORT\_SEQ;

### Get All APN IN DOC – Report

SP: IE\_GET\_CSA\_ALL\_APN\_IN\_DOC passing CSA\_ID

SELECT

    IEAOWN.IE\_REAL\_PROPERTY.PROPERTY\_ID,

    IEAOWN.IE\_REAL\_PROPERTY.PRINT\_PARCEL,

    IEAOWN.IE\_REAL\_PROPERTY.SORT\_PARCEL,

    IEAOWN.IE\_PARCEL\_DET.SEQ\_NUM

FROM

    IEAOWN.IE\_DOCUMENT,

    IEAOWN.IE\_PARCEL\_DET,

    IEAOWN.IE\_REAL\_PROPERTY,

    IEAOWN.IE\_CSA\_SALE\_INFO

WHERE

    IEAOWN.IE\_DOCUMENT.DOC\_PREFIX = IEAOWN.IE\_PARCEL\_DET.DOC\_PREFIX

    AND IEAOWN.IE\_DOCUMENT.DOC\_SERIES = IEAOWN.IE\_PARCEL\_DET.DOC\_SERIES

    AND IEAOWN.IE\_DOCUMENT.DOC\_PREFIX = IEAOWN.IE\_CSA\_SALE\_INFO.DOC\_PREFIX

    AND IEAOWN.IE\_DOCUMENT.DOC\_SERIES = IEAOWN.IE\_CSA\_SALE\_INFO.DOC\_SERIES

    AND IEAOWN.IE\_PARCEL\_DET.PRINT\_PARCEL = IEAOWN.IE\_REAL\_PROPERTY.PRINT\_PARCEL

    AND (IEAOWN.IE\_PARCEL\_DET.END\_DT IS NULL)

    AND IEAOWN.IE\_CSA\_SALE\_INFO.CSA\_ID = P\_CSA\_ID

ORDER BY

    IEAOWN.IE\_PARCEL\_DET.SEQ\_NUM;

## Fields

### Sale Info Fields

Table:

IE\_CSA\_SALE\_INFO

See query [Get Sale Info Tab](#_Get_Sale_Info)

| **Field** | **Requirement** |
| --- | --- |
| Anticipated Use | * Anticipated Use * Drop Down * Required * Value: see [Anticipated Use drop down](#_Anticipated_Use_Drop) * Default selection is blank * IE\_CSA\_SALE\_INFO.ANTICIPATED\_USE\_CD\_NAME |
| Details | * Textbox * Conditionally editable * IE\_CSA\_SALE\_INFO.PROP\_USE\_DETL * Default – Blank |
| % Owner Occupied | * Textbox * Default- Blank * IE\_CSA\_SALE\_INFO.PCT\_OWNER\_OCCUP |
| Broker Involved | * Drop Down Yes/No * Default blank * IE\_CSA\_SALE\_INFO.BROKER\_INVOLVED\_FL |
| Buyer/Seller relationship | * Drop Down Yes /No * Conditionally Required * Default blank * IE\_CSA\_SALE\_INFO.BUY\_SELL\_REL\_FL |
| If so, specify | * Textbox * IE\_CSA\_SALE\_INFO.BUY\_SELL\_REL\_DESC * Conditionally required |
| Purchase Predated By | * Checkbox * IE\_CSA\_SALE\_INFO.PUR\_PREDATE\_BY\_OPT * Default Unchecked |
| Contract Date | * Calendar * Conditionally required * IE\_CSA\_SALE\_INFO.PREDATE\_CONT\_DATE * Contract Date must be less than or equal to Event date |
| Contract of Sale | * Checkbox * Default Unchecked   IE\_CSA\_SALE\_INFO.PUR\_PRED\_CONT\_SALE |
| Condition At Sale | * Condition At Sale * Values: see [Condition at Sale drop down](#_Condition_At_Sale) * IE\_CSA\_SALE\_INFO.COND\_AT\_SALE\_CD |
| Benchmark Rating | * Display based on selection picked in Benchmark Rating drop-down field on Income and Analysis & value Ind tab * IE\_CSA\_SALE\_INFO.BENCHMARK\_RATE\_CD * Read only |
| Supervisor Approved | * Display based on value entered in Supervisor Approved Dropdown field in Source tab * IE\_CSA\_SALE\_INFO.SUPRV\_APPROVED\_FL * Read only |

### Property Info Fields

Tables:

IE\_CSA\_SALE\_INFO

IE\_DOCUMENT

IE\_CHG\_OWNER

IE\_REAL\_PROPERTY

See query [Get Property Info](#_Get_Prop_Characteristics)

| **Field** | **Requirement** |
| --- | --- |
| Document | * Document * IE\_CSA\_SALE\_INFO.DOC\_PREFIX * IE\_CSA\_SALE\_INFO.DOC\_SERIES * Read only |
| Buyer | * The Buyer name is Mailing name as of the Event ts * IE\_ADDRESS.MAILING\_NAME * Read only |
| Seller | * The seller’s name is the mailing name as of the event ts minus 1 minute * IE\_ADDRESS.MAILING\_NAME * Read only |
| Event Date | * Event Date * IE\_CSA\_SALE\_INFO. EVENT\_TS * Read only |
| APN | * APN * IE\_REAL\_PROPERTY.PRINT\_PARCEL * Read only |
| Address | * Read only * IE\_REAL\_PROPERTY.ADDRESS, SITUS\_CITY\_NAME, SITUS\_STATE, SITUS\_ZIP\_CD |
| Use Cd | * Use Cd * Read only * IE\_CSA\_SALE\_INFO. USE\_CD |
| Use | * Use * Read only * IE\_CSA\_SALE\_INFO. USE\_NAME |
| APN Count | * APN Count * IE\_DOCUMENT.DOC\_PARCEL\_CNT * Read only |
| Ind Pur Price | * Ind Pur Price * IE\_CHG\_OWNER.IND\_PUR\_PRICE |
| Adj Sales Price | * Adj Sales Price * IE\_CHG\_OWNER.ADJ\_SALES\_PRICE * Read only |
| Trans Tax Price | * Trans Tax Price * IE\_CSA\_SALE\_INFO. TRAN\_TAX\_PRICE * Read only |
| Gross SF | * Gross SF * IE\_CSA\_SALE\_INFO. TOT\_BUILDING\_AREA * Read only |
| Land Area | * Land Area * IE\_CSA\_SALE\_INFO. TOT\_LOT\_SIZE * Read only |
| PC NRA | * PC NRA * IE\_CSA\_SALE\_INFO. TOT\_NET\_RENT\_AREA * Read only |

### Prop Characteristics Fields

Tables:

IE\_CSA\_GET\_PROP\_CHAR

See query [Get Prop Characteristics Tab](#_Get_Prop_Characteristics_2)

| **Field** | **Requirement** |
| --- | --- |
| Zoning | * Zoning – the primary zoning property characteristics of the primary APN. * IE\_ZONING\_CODE. Zoning\_Name * Read only |
| Gross Sq Ft | * Total summary building areas for all APNs if more than 1 APN in the document. * IE\_CSA\_SALE\_INFO.TOT\_BUILDING\_AREA * Read only |
| Net Rentable Area | * Total NRA for all APNs if more than 1 APN in the document. * IE\_CSA\_SALE\_INFO.TOT\_NET\_RENT\_AREA * Read only |
| Land Area | * Total lot size for all APNs if more than 1 APN in the document. * IE\_CSA\_SALE\_INFO.TOT\_LOT\_SIZE * Read only |
| Parking | * Total parking for all APNs if more than 1 APN in the document. * IE\_CSA\_PROP\_CHAR. TOT\_PARKING * Real only |
| SBE Low | * Ranges display Low and High values if there are more than 1 APN in the document, otherwise Low and High values are the same and are the values for the 1 APN in the document. * IE\_CSA\_PROP\_CHAR.SBE\_CLASS\_LOW * Read only |
| SBE High | * IE\_CSA\_PROP\_CHAR.SBE\_CLASS\_HI * Read only |
| MVS Low | * IE\_CSA\_PROP\_CHAR.MVS\_CLASS\_LOW * Read only |
| MVS High | * IE\_CSA\_PROP\_CHAR.MVS\_CLASS\_HIGH * Read only |
| Year Built Low | * IE\_CSA\_PROP\_CHAR.BLDG\_BUILT\_YR\_LOW * Read only |
| Year Built High | * IE\_CSA\_PROP\_CHAR.BLDG\_BUILT\_YR\_HI * Read only |
| Effective Year Low | * IE\_CSA\_PROP\_CHAR.BLDG\_EFF\_YR\_LOW * Read only |
| Effective Year High | * IE\_CSA\_PROP\_CHAR.NLDG\_EFF\_YR\_HI * Read only |
| Percentage Built Out Low | * IE\_CSA\_PROP\_CHAR.PCT\_BUILT\_OUT\_LOW * Read only |
| Percentage Built Out High | * IE\_CSA\_PROP\_CHAR.PCT\_BUILT\_OUT\_HI * Read only |
| Percentage Office Low | * IE\_CSA\_PROP\_CHAR.PCT\_OFFICE\_LOW * Read only |
| Percentage Office High | * IE\_CSA\_PROP\_CHAR.PCT\_OFFICE\_HI * Read only |
| No of Bldgs Low | * IE\_CSA\_PROP\_CHAR.NUM\_BUILDINGS\_LOW * Read only |
| No of Bldgs High | * IE\_CSA\_PROP\_CHAR.NUM\_BUILDINGS\_HI * Read only |
| Stories Low | * IE\_CSA\_PROP\_CHAR.NUM\_STORIES\_LOW * Read only |
| Stories High | * IE\_CSA\_PROP\_CHAR.NUM\_STORIES\_HI * Read only |
| Wall Height Low | * IE\_CSA\_PROP\_CHAR.AVG\_ACTUAL\_HT\_LOW * Read only |
| Wall Height High | * IE\_CSA\_PROP\_CHAR.ANG\_ACTUAL\_HT\_HI * Read only |
| Land Imp Ratio Low | * IE\_CSA\_PROP\_CHAR.LAND\_IMP\_RATIO\_LOW * Read only |
| Land Imp Ratio High | * IE\_CSA\_PROP\_CHAR.LAND\_IMP\_RATIO\_HI * Read only |
| FAR Low | * IE\_CSA\_PROP\_CHAR.FAR\_LOW * Read only |
| FAR High | * IE\_CSA\_PROP\_CHAR.FAR\_HI * Read only |

### Income Fields

Tables:

IE\_CSA\_LEASE

IE\_CSA\_SALE\_INFO

See query [Get Income Tab](#_Get_Income_Tab)

| **Field** | **Requirement** |
| --- | --- |
| Total Rent(Current, Anticipated) | * Total Rent * IE\_CSA\_LEASE. CURRENT\_RENT\_SUM * IE\_CSA\_LEASE. ANTICIP\_RENT\_SUM * Read only |
| % Occupancy | * Read only * IE\_CSA\_SALE\_INFO.PCT\_OCCUPANCY |
| Occupied Sq Ft | * Calculation: Sum of Sq FT Leased/Available * IE\_CSA\_LEASE. OCCUPIED\_SQ\_FT |
| Total Sq Ft: | * Calculation: Sum of Sq FT Leased/Available * Read only * IE\_CSA\_LEASE. Total\_SQ\_FT |
| Total Rent | * Calculation: Sum of Current Rent and Anticipated Rent * IE\_CSA\_LEASE.TOTAL\_RENT * Read only |

### Lease Fields

Table: IS\_CSA\_LEASE

IE\_CSA\_LEASE\_DET  
IE\_LEASE\_USE\_CAT  
IE\_LEASE\_SUBCAT

See query [Get Lease Info](#_Get_Expenses_Tab)

| **Field** | **Requirement** |
| --- | --- |
| APN | * APN * Required * Dropdown * Value Values: see [APN Dropdown](#_Get_APN) * Where Code\_ID is 456 |
| Location | * Location * Required * Textbox * IE\_CSA\_LEASE.LEASE\_LOCATION |
| Lessee | * Lessee * Texbox * IE\_CSA\_LEASE.LESSEE\_NAME |
| Use Category | * Conditionally Required * Dropdown * Values: see [Use Category Dropdown](#_Use_Category_Drop) |
| Per Sq Ft (Current Rent) | * Formula: (Current Rent)/Sq Ft Leased/Available) |
| Subcat | * Conditionally Required * Values: See [Subcat Dropdown](#_Subcat_Drop_Down) |
| Current Rent | * Conditionally Required * IE\_CSA\_LEASE.CURRENT\_RENT |
| Anticipated Rent | * Conditionally Required * IE\_CSA\_LEASE. ANTICIPATED\_RENT |
| Per Sq Ft (Anticipated Rent) | * Formula: (Anticipated Rent)/Sq Ft Leased/Available) |
| Start Rent | * Conditionally Required * IE\_CSA\_LEASE. INITIAL\_RENT |
| Stabilized Rent | * IE\_CSA\_LEASE. STABIL\_RENT |
| Option | * IE\_CSA\_LEASE.LEASE\_OPTION |
| Info Source | * Conditionally required * IE\_CSA\_LEASE.INFO\_SOURCE\_TEXT |
| Rent Adjustment | * IE\_CSA\_LEASE.RENT\_ADJ\_TEXT |
| Parking | * Textboxes * IE\_CSA\_LEASE.LEASE\_PARKING |
| Parking 2 | * IE\_CSA\_LEASE.LEASE\_PARKING\_2 |
| Use for Rent Comp | * Required * IE\_CSA\_LEASE.USE\_FOR\_COMP\_FL |
| Sq Ft Leased/Available | * Required |
| Start Date | * Required * IE\_CSA\_LEASE.LEASE\_START\_DT |
| Tenancy | * Drop Down * Value: see [Tenancy Dropdown](#_Tenancy_Drop_Down) * IE\_CSA\_LEASE.TENANCY\_CD |
| Lease Type | * Drop Down * Value: see [Lease Type Dropdown](#_Lease_Type_Drop) * IE\_CSA\_LEASE.LEASE\_TYPE\_CD |
| Expense Type | * Conditionally Required * Drop Down * Value: see [Expense Type Dropdown](#_Expense_Type_Drop) * IE\_CSA\_LEASE.EXPENSE\_TYPE\_CD |
| TI Allowance | * IE\_CSA\_LEASE.TI\_ALLOWANCE |
| TI Allowance Type | * IE\_CSA\_LEASE.TI\_TYPE\_CD |
| Industrial Info | * Label |
| Clear Height | * IE\_CSA\_LEASE\_DET.IND\_CLR\_HGT |
| % Office Area | * IE\_CSA\_LEASE\_DET. IND\_OFFC\_AREA\_PCT |
| % Lab | * IE\_CSA\_LEASE\_DET.IND\_LAB\_PCT |
| % Manufacturing | * IE\_CSA\_LEASE\_DET.IND\_MFG\_PCT |
| % Total | * Calculated field * Sum of % office Area, % Lab, and % Manufacturing |
| Office Info | * Label |
| Load Factor | * IE\_CSA\_LEASE\_DET.OFFC\_LOAD\_FACTOR |
| Annual Expense Stop | * IE\_CSA\_LEASE\_DET.OFFC\_EXPENSE\_STOP |
| Commercial Info | * Label |
| Percentage Rent | * IE\_CSA\_LEASE\_DET.RETAIL\_RENT\_PCT |
| Breakpoint | * IE\_CSA\_LEASE\_DET. RENT\_BREAKPOINT |

### Expenses Fields

Table: IE\_CSA\_AMOUNT\_CODE

See query [Get Expenses Tab](#_Get_Expenses)

| **Field** | **Requirement** |
| --- | --- |
| Use for OAR | * Checkbox * Default is unchecked |
| Owner’s Amount  Management | * Textbox * Conditionally editable * IE\_CSA\_AMOUNT\_CODE.AMOUNT\_DESCRIPTION where AMOUNT\_CD = 1 |
| $/NRA SF or $/Gross SF Owner’s Amount sManagement | * Calculated field * See Expense Tab Fields section |
| Owner’s Amount Insurance | * Textbox * Conditionally editable * IE\_CSA\_AMOUNT\_CODE.AMOUNT\_DESCRIPTION where AMOUNT\_CD = 2 |
| Owner’s Amount Legal/Accounting | * Textbox * Conditionally editable * IE\_CSA\_AMOUNT\_CODE.AMOUNT\_DESCRIPTION where AMOUNT\_CD = 3 |
| Owner’s Amount Exterior Maintenance | * Textbox * Conditionally editable * IE\_CSA\_AMOUNT\_CODE.AMOUNT\_DESCRIPTION where AMOUNT\_CD = 4 |
| Owner’s Amount Interior Maintenance | * Textbox * Conditionally editable * IE\_CSA\_AMOUNT\_CODE.AMOUNT\_DESCRIPTION where AMOUNT\_CD = 5 |
| Owner’s Amount Roof Maintenance | * Textbox * Conditionally editable * IE\_CSA\_AMOUNT\_CODE.AMOUNT\_DESCRIPTION where AMOUNT\_CD = 6 |
| Owner’s Amount Ground Maintenance | * Textbox * Conditionally editable * IE\_CSA\_AMOUNT\_CODE.AMOUNT\_DESCRIPTION where AMOUNT\_CD = 7 |
| Owner’s Amount Security | * Textbox * Conditionally editable * IE\_CSA\_AMOUNT\_CODE.AMOUNT\_DESCRIPTION where AMOUNT\_CD = 8 |
| Owner’s Amount Janitorial | * Textbox * Conditionally editable * IE\_CSA\_AMOUNT\_CODE.AMOUNT\_DESCRIPTION where AMOUNT\_CD = 9 |
| Owner’s Amount Repairs | * Textbox * Conditionally editable * IE\_CSA\_AMOUNT\_CODE.AMOUNT\_DESCRIPTION where AMOUNT\_CD = 10 |
| Owner’s Amount Common Area | * Textbox * Conditionally editable * IE\_CSA\_AMOUNT\_CODE.AMOUNT\_DESCRIPTION where AMOUNT\_CD = 11 |
| Owner’s Amount Utilities | * Textbox * Conditionally editable * IE\_CSA\_AMOUNT\_CODE.AMOUNT\_DESCRIPTION where AMOUNT\_CD = 12 |
| Owner’s amount Blank Textbox for miscellaneous sale expense (Other Inputs) | * Textbox * Conditionally editable * IE\_CSA\_AMOUNT\_CODE.AMOUNT\_DESCRIPTION where AMOUNT\_CD = 13 |
| Owner’s Amount Real Estate Taxes | * Textbox * Conditionally editable * IE\_CSA\_AMOUNT\_CODE.AMOUNT\_DESCRIPTION where AMOUNT\_CD = 14 |
| Owner’s Amount Subtotals | * Calculation: Sum of all the fields from Management to Utilities |
| Owner’s Amount Real Estate Taxes | * Textbox * Conditionally editable |
| Owner’s Amount Totals | * See Expense Tab Fields section |
| Owner’s Amount $/NRA SF | * See expense Tab Fields section |
| $/Gross SF Label | * Label of the column header is $/Gross SF * If Income tab doesn’t have Total SF, then use Gross SF * Formula: Owner’s amount/ Gross Sq Ft * Eg: Owner’s amount is 30,000 and Gross SF is 47,586 then $/Gross SF should be 0.63 |
| $/NRA SF Label | * Label of the column header is $/NRA SF * If Income tab doesn’t have Total SF, then use Gross SF * Formula: Owner’s amount/ Gross Sq Ft * Eg: Owner’s amount is 30,000 and Gross SF is 47,586 then $/Gross SF should be 0.63 |
| Tenant’s Amount  Management | * Textbox * Conditionally editable * IE\_CSA\_AMOUNT\_CODE.AMOUNT\_DESCRIPTION where AMOUNT\_CD = 1 |
| $/NRA SF Management | * Calculated field * See Expense Tab Fields section |
| Tenant’s Amount Insurance | * Textbox * Conditionally editable * IE\_CSA\_AMOUNT\_CODE.AMOUNT\_DESCRIPTION where AMOUNT\_CD = 2 |
| Tenant’s Amount Legal/Accounting | * Textbox * Conditionally editable * IE\_CSA\_AMOUNT\_CODE.AMOUNT\_DESCRIPTION where AMOUNT\_CD = 3 |
| Tenant’s Amount Exterior Maintenance | * Textbox * Conditionally editable * IE\_CSA\_AMOUNT\_CODE.AMOUNT\_DESCRIPTION where AMOUNT\_CD = 4 |
| Tenant’s Amount Interior Maintenance | * Textbox * Conditionally editable * IE\_CSA\_AMOUNT\_CODE.AMOUNT\_DESCRIPTION where AMOUNT\_CD = 5 |
| Tenant’s Amount Roof Maintenance | * Textbox * Conditionally editable * IE\_CSA\_AMOUNT\_CODE.AMOUNT\_DESCRIPTION where AMOUNT\_CD = 6 |
| Tenant’s Amount Ground Maintenance | * Textbox * Conditionally editable * IE\_CSA\_AMOUNT\_CODE.AMOUNT\_DESCRIPTION where AMOUNT\_CD = 7 |
| Tenant’s Amount Security | * Textbox * Conditionally editable * IE\_CSA\_AMOUNT\_CODE.AMOUNT\_DESCRIPTION where AMOUNT\_CD = 8 |
| Tenant’s Amount Janitorial | * Textbox * Conditionally editable * IE\_CSA\_AMOUNT\_CODE.AMOUNT\_DESCRIPTION where AMOUNT\_CD = 9 |
| Tenant’s Amount Repairs | * Textbox * Conditionally editable * IE\_CSA\_AMOUNT\_CODE.AMOUNT\_DESCRIPTION where AMOUNT\_CD = 10 |
| Tenant’s Amount Common Area | * Textbox * Conditionally editable * IE\_CSA\_AMOUNT\_CODE.AMOUNT\_DESCRIPTION where AMOUNT\_CD = 11 |
| Tenant’s Amount Utilities | * Textbox * Conditionally editable * IE\_CSA\_AMOUNT\_CODE.AMOUNT\_DESCRIPTION where AMOUNT\_CD = 12 |
| Tenant’s amount Blank Textbox for miscellaneous sale expense | * Textbox * Conditionally editable * IE\_CSA\_AMOUNT\_CODE.AMOUNT\_DESCRIPTION where AMOUNT\_CD = 13 |
| Tenant’s Amount Subtotals | * Calculation: Sum of all the fields from Management to Utilities |
| Tenant’s Amount Real Estate Taxes | * Textbox * Conditionally editable |
| Tenant’s Amount Totals | * Sum of all the fields from Management through Real Estate Taxes |
| Total Expense | * Calculation: Owner’s Amount Totals (a) + Tenant’s Amount Totals (b) = Total Expense |

### Adjustments

Tables:

IE\_CSA\_AMOUNT\_CODE

IE\_CSA\_AMOUNT

See query [Get Adjustments Tab](#_Get_Adjustments_Tab)

| **Field** | **Requirement** |
| --- | --- |
| Down | * Textbox * Down * Label: IE\_CSA\_AMOUNT\_CODE.AMOUNT\_CD (16) * Value: IE\_CSA\_AMOUNT. AMOUNT\_CSA where Amount code =16 |
| 1st | * Textbox * 1st * IE\_CSA\_AMOUNT\_CODE.AMOUNT\_CD (17) * Value: IE\_CSA\_AMOUNT. AMOUNT\_CSA where Amount code =17 |
| 2nd | * Textbox * 2nd * IE\_CSA\_AMOUNT\_CODE.AMOUNT\_CD (18) * Value: IE\_CSA\_AMOUNT. AMOUNT\_CSA where Amount code = 18 |
| Others | * Textbox * Others * IE\_CSA\_AMOUNT\_CODE.AMOUNT\_CD (19) * Value: IE\_CSA\_AMOUNT. AMOUNT\_CSA where Amount code = 19 |
| Ind Pur Price | * Populate if applicable |
| Total (a thru d) | * Formula: Total (a thru d) = Down (a) + 1st (b) + 2nd (c) + Others (d) |
| CE Adjustments | * Textbox * CE Adjustments * IE\_CSA\_AMOUNT\_CODE.AMOUNT\_CD (20) * Value: IE\_CSA\_AMOUNT. AMOUNT\_CSA where Amount code = 20 |
| Bonds | * Textbox * Bonds * IE\_CSA\_AMOUNT\_CODE.AMOUNT\_CD (21) * Value: IE\_CSA\_AMOUNT. AMOUNT\_CSA where Amount code = 21 |
| Business Property | * Textbox * Business Property * IE\_CSA\_AMOUNT\_CODE.AMOUNT\_CD (22) * Value: IE\_CSA\_AMOUNT. AMOUNT\_CSA where Amount code = 22 |
| Other Adjustments | * Textbox * Other Adjustments * IE\_CSA\_AMOUNT\_CODE.AMOUNT\_CD (23) * Value: IE\_CSA\_AMOUNT. AMOUNT\_CSA where Amount code = 23 |
| Adj Sales Price | * Populate if applicable |
| Total (e thru h) | * Formula: Ind Pur Price (e) + CE Adjustments (f) + Business Property (g) + Other Adjustments (h) |

### Income Analysis & Value Ind Fields

Tables:

IE\_CSA\_ANALYSIS

IE\_FIELD\_NAME

See query [Get Income and Analysis & Value Ind Tab](#_Get_Income_and)

| **Field** | **Requirement** |
| --- | --- |
| Potential Gross Income | * Read only * Calculated field. See Income Analysis & Value Ind Tab Fields section |
| Vacancy and Coll Loss | * Read only * Calculated field. See Income Analysis & Value Ind Tab Fields section |
| Additional Net Income | * Textbox * IE\_CSA\_ANALYSIS. CSA.ADDITION\_NET\_INCOM * Whole dollar amount and must be > 0 if entered. |
| Tenant Expense Reimbursement | * Textbox * IE\_CSA\_ANALYSIS. TENANT\_REIMBURSE * Whole dollar amount and must be > 0 if entered. |
| Effective Gross Income | * Total (a thru d) = Down (a) + 1st (b) + 2nd (c) + Others (d) * Calculated field. See Income Analysis & Value Ind Tab Fields section * Read only |
| Owner's Expenses | * Read only * Calculated field. See Income Analysis & Value Ind Tab Fields section |
| Anticipated Property Taxes | * Textbox * IE\_CSA\_ANALYSIS. ANTI\_PROPERTY\_TAX |
| Other Tax Amount – Blank label | * Textbox * IE\_CSA\_ANALYSIS. OTHER\_TAXES\_AMOUNT |
| Net Operating Income | * Calculated field. See Income Analysis & Value Ind Tab Fields section * Read only |
| Adj Sale Price | * Calculated field. See Income Analysis & Value Ind Tab Fields section * Read only |
| PGI % | * Text box * IE\_CSA\_ANALYSIS. PCT\_PGI |
| EGI % | * Calculated field. See Income Analysis & Value Ind Tab Fields section |
| Tax Rate | * IE\_CSA\_ANALYSIS. TAX\_RATE * The system displays the value with two decimal points. If there are fewer than two digits, the system pads with a 0. |
| NOI/Adj. Sale Price (%) | * Calculated field. See Income Analysis & Value Ind Tab Fields section |
| Adj. Sale Price/PGI | * Calculated field. See Income Analysis & Value Ind Tab Fields section |
| Adj. Sale price/NRA or Adj. Sale Price/Gross SF | * Calculated field. See Income Analysis & Value Ind Tab Fields section |
| Rent(PGI)/NRA/Yr or Rent (PGI) Gross SF/Yr | * Calculated field. See Income Analysis & Value Ind Tab Fields section |
| NOI/NRA/Yr or NOI/Gross SF/Yr | * Calculated field. See Income Analysis & Value Ind Tab Fields section |
| Owners Expenses/NRA/Yr or Owners Expenses/Gross SF Yr | * Calculated field. See Income Analysis & Value Ind Tab Fields section |
| Total expense/Gross SF/Yr | * Calculated field. See Income Analysis & Value Ind Tab Fields section |
| Min % Occupancy | * IE\_CSA\_ANALYSIS.PCT\_OCCUP\_MINIMUM |
| % Occupancy | * IE\_CSA\_ANALYSIS.PCT\_OCCUPANCY |
| OAR | * Expenses Tab – Use for OAR = Yes |
| Property NRA | * IE\_CSA\_ANALYSIS. CSA\_NET\_RENT\_AREA * Read only |
| Benchmark Rating | * IE\_FIELD\_NAME.FIELD\_NAME where Field ID = 121 * Drop Down * See values [Benchmark Rating Drop Down](#_Benchmark_Rating_Drop) |

### Sources Fields

Table:

IE\_CSA\_SOURCE

IE\_CSA\_SALE\_INFO

See query [Get Sources Tab](#_Get_Sources_Tab)

| **Field** | **Requirement** |
| --- | --- |
| (Source) Primary | * Primary * Drop Down * Required * Value: see [Primary drop down](#_Primary_Source_Drop) * Default selection is blank. * IE\_CSA\_SOURCE.SOURCE\_CD\_PRI |
| Name | * Text Box * Name * IE\_CSA\_SOURCE.SOURCE\_NAME\_PRI |
| Title | * Text box * Title * IE\_CSA\_SOURCE.SOURCE\_TITLE\_PRI |
| Company | * Text Box * Company * IE\_CSA\_SOURCE.SOURCE\_COMPANY\_PRI |
| Email | * Text Box * Email * IE\_CSA\_SOURCE.SRCE\_EMAIL\_PRI |
| Phone | * Text Box * Phone * IE\_CSA\_SOURCE.SOURCE\_PHONE\_PRI |
| Ext | * Text Box * Ext * IE\_CSA\_SOURCE.SRCE\_PH\_EX\_PRI |
| Alternate Phone | * Text Box * Alternate Phone * IE\_CSA\_SOURCE.SRCE\_ALT\_PH\_PRI |
| Ext | * Text Box * Ext * IE\_CSA\_SOURCE.SRCE\_ALT\_PH\_EX\_PRI |
| Secondary | * Secondary * Drop Down * Required * Value: see [Secondary drop down](#_Secondary_Source_Drop) * Default selection is blank * IE\_CSA\_SOURCE. SOURCE\_CD\_SEC |
| Name | * Text Box * Name * IE\_CSA\_SOURCE.SOURCE\_NAME\_SEC |
| Title | * Text box * Title * IE\_CSA\_SOURCE.SOURCE\_TITLE\_SEC |
| Company | * Text Box * Company * IE\_CSA\_SOURCE.SOURCE\_COMPANY\_SEC |
| Email | * Text Box * Email * IE\_CSA\_SOURCE.SRCE\_EMAIL\_SEC |
| Phone | * Text Box * Phone * IE\_CSA\_SOURCE.SOURCE\_PHONE\_SEC |
| Ext | * Text Box * Ext * IE\_CSA\_SOURCE.SRCE\_PH\_EX\_SEC |
| Alternate Phone | * Text Box * Alternate Phone * IE\_CSA\_SOURCE.SRCE\_ALT\_PH\_SEC |
| Ext | * Text Box * Ext * IE\_CSA\_SOURCE.SRCE\_ALT\_PH\_EX\_PRI |
| Label - Additional Sources of Information |  |
| IQ | * IQ * Check box * IE\_CSA\_SOURCE. SRCE\_IQ\_FL |
| AAB | * AAB * Check box * IE\_CSA\_SOURCE.SRCE\_AAB\_FL |
| PCOR/COS | * PCOR/COS * Check box * IE\_CSA\_SOURCE.SRCE\_PCOR\_COS\_FL |
| RFR | * RFR * Check box * IE\_CSA\_SOURCE.SRCE\_RFR\_FL |
| Other | * Other * Text box * IE\_CSA\_SOURCE.SOURCE\_OTHER\_DESC |
| Source History Label |  |
| Created By | * Worker   + Current logged in Worker Last Name, First Name <space> Middle Name   + Format: [Worker Last name comma then first, middle](#_Worker_Last_name) * Read only * IE\_CSA\_SOURCE.SOURCE\_CREATED\_BY |
| Created Date | * Calendar * IE\_CSA\_SOURCE.SOURCE\_CREATE\_DT |
| Modified By | * Worker   + Current logged in Worker Last Name, First Name <space> Middle Name   + Format: [Worker Last name comma then first, middle](#_Worker_Last_name) * Read only * IE\_CSA\_SOURCE.SOURCE\_MODIFIED\_BY |
| Modified Date | * IE\_CSA\_SOURCE.SOURCE\_MODIFIED\_DT |
| Modify Reason | * Drop Down * Value: see [Modify Reason drop down](#_Modify_Reason_Drop) * IE\_CSA\_SOURCE.SRCE\_MODIFY\_RSN\_CD |
| Supervisor Approved | * Drop Down * Yes/No * IE\_CSA\_SALE\_INFO.SUPRV\_APPROVED\_FL |
| Suprv Update Date | * Read only * Format: MM/DD/YYYY * IE\_CSA\_SALE\_INFO.SUPRV\_APPR\_UPD\_TS |
| Suprv Approval Update By | * Worker   + Current logged in Worker Last Name, First Name <space> Middle Name   + Format: [Worker Last name comma then first, middle](#_Worker_Last_name) * Read only * IE\_CSA\_SALE\_INFO.SUPRV\_APPR\_UPD\_WKR |

## BLL

## DAL

## 

# Included Defects and Features

## <<Feature #>>

# Testing Considerations

<<List any testing considerations like testing batch >>

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Version | Purpose | Use Code | APN | Comments |
| Editable | Improved Property | 8100 | 38-3182-4 |  |
| Read Only | Vacant Land | 4000 | 87-23-13-1 |  |
| Editable | Vacant Land | 4000 | 75-47-53 |  |
| Editable | Improved Property with more than 1 APN |  | 429-68-1-2 |  |
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