

User Guide: Commercial Lead to Lease

Version History

Version	Description of Change	Author	Date
0.1	First Draft	Jacob Smycz	17/03/2025

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1. Overview

The **Commercial Lead to Lease** process takes place from the time that a Commercial unit is available to let until all activities required to capture and track the progress of the let is completed. These activities include:

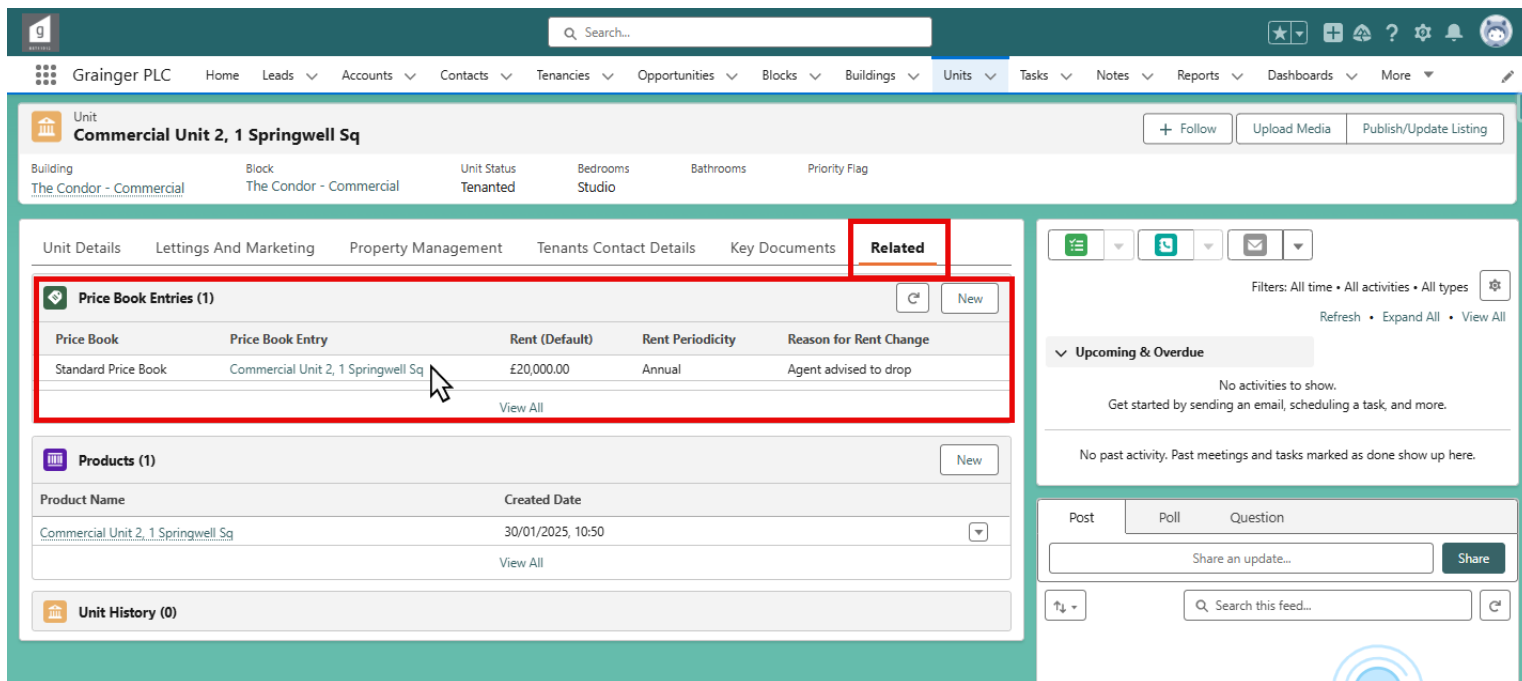
- Adding and updating marketing rents
- Recieving offers from commercial agents
- Capturing multiple offers throughout the negotiation process
- Saving draft lease documents
- Adding the tenant details to Qube
- Saving signed lease documents
- Tracking fit out

As soon as an offer is made for a commercial unit, a new Account should be created in Salesforce for the tenant (if it does not already exist) as well as a new Commercial Opportunity.

- Each Commercial Opportunity has a number of stages that the process will progress through.
- Each stage signifies where the Opportunity is up to, and some stages can only be progressed to after an Approval.
- Each Commercial Opportunity needs to have an Offer created to capture the initial offer put forward by the agent.
- Any subsequent offers with different terms should captured by creating a new Offer with the new terms.

2. How to Update Marketing Rent

Updating the Marketing Rent for a Unit is done from the Unit's **Price Book Entry**.

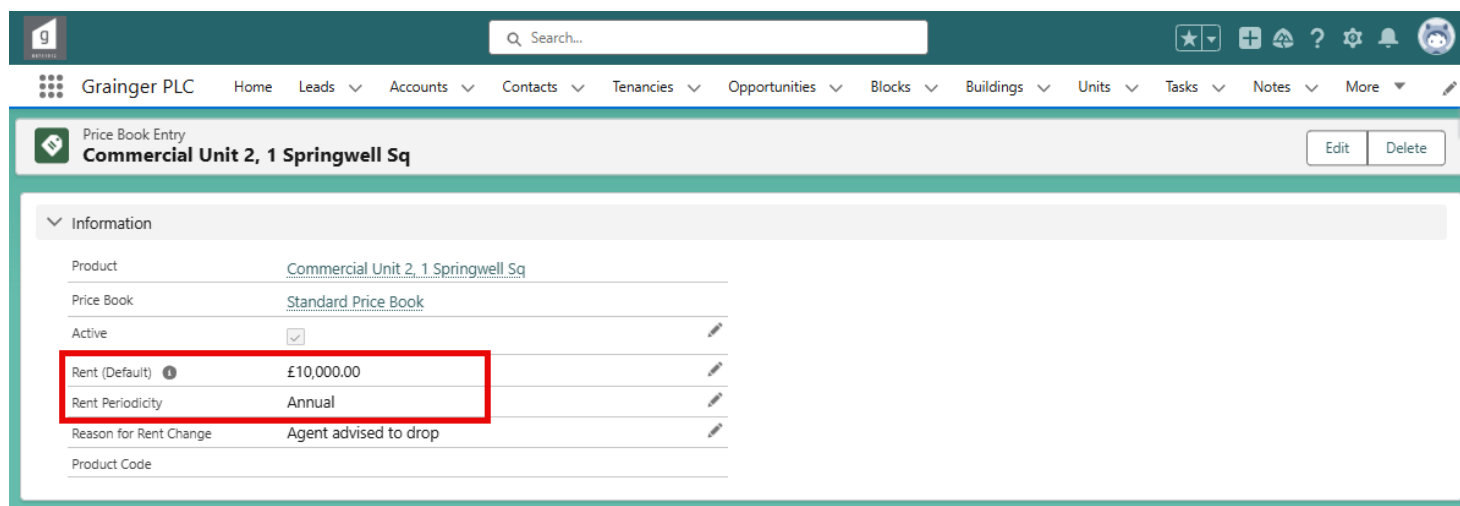


The screenshot shows the 'Unit' page for 'Commercial Unit 2, 1 Springwell Sq'. The 'Related' tab is active, and the 'Price Book Entries (1)' section is highlighted with a red box. The table below shows the details of the selected entry.

Price Book	Price Book Entry	Rent (Default)	Rent Periodicity	Reason for Rent Change
Standard Price Book	Commercial Unit 2, 1 Springwell Sq	£20,000.00	Annual	Agent advised to drop

Below the table, there are sections for 'Products (1)' and 'Unit History (0)'.

To update the Marketing Price, open the **Standard Price Book** Price Book Entry



The screenshot shows the 'Price Book Entry' page for 'Commercial Unit 2, 1 Springwell Sq'. The 'Information' section is expanded, and the 'Rent (Default)' and 'Rent Periodicity' fields are highlighted with a red box.

Field	Value
Product	Commercial Unit 2, 1 Springwell Sq
Price Book	Standard Price Book
Active	<input checked="" type="checkbox"/>
Rent (Default)	£10,000.00
Rent Periodicity	Annual
Reason for Rent Change	Agent advised to drop
Product Code	

Input the price for the unit in the **Rent (Default)** field

Ensure that **Rent Periodicity** is 'Annual' – all Commercial Price Book Entries need to 'Annual'.

Price Book Entry
Commercial Unit 2, 1 Springwell Sq

[Edit](#) [Delete](#)

Information

Product: [Commercial Unit 2, 1 Springwell Sq](#)

Price Book: [Standard Price Book](#)

Active: ☒

Rent (Default): £10,000.00

Rent Periodicity: Annual

Reason for Rent Change: Agent advised to drop

Product Code:

Price Book Entry History (6)

Date	Field	User	Original Value	New Value
19/02/2025, 15:12	Rent (Default)	Open box	£20,000	£10,000
30/01/2025, 11:36	Rent (Default)	Bradley Wallace	£12,345	£20,000
30/01/2025, 10:59	Reason for Rent Change	Open box	Agentn advised to drop	Agent advised to drop
30/01/2025, 10:58	Rent (Default)	Open box	£123,456	£12,345
30/01/2025, 10:58	Reason for Rent Change	Open box		Agentn advised to drop
30/01/2025, 10:58	Created.	Open box		

[View All](#)

If there is a price change, capture the reason in **Reason for Rent Change**. Any changes made to a price book entry will be tracked and the history can be seen at the bottom of the page.

2.1 Creating a new Product and Price Book

When a new Commercial Unit is added to Salesforce (a new Unit would have been added to Qube which creates the Unit in Salesforce), a new **Product** and new **Price Book Entry** will need to be created.

Unit
Commercial Unit Number 1

Building: [Mariners Cottages, 1 South Shields, Tyne & W](#)

Block: [NE Postcodes](#)

Unit Status: [On the Market Available to View](#)

Related

Price Book Entries (0) [New](#)

Products (0) [New](#)

A **Product** needs to be created before a **Price Book Entry**. Grainger's naming convention is to name the product the same as the Unit. In this case it will be "Commercial Unit Number 1". Click on the "New" button in the Products section. The below screen will then pop up.

On the Market Available to View

New Product

* = Required Information

Product Information

* Product Name

Product Code

Unit

Product Description

Active ☒

Cancel Save & New Save

Enter the **Product Name** and mark it as **Active**. Then click save.

Search...

Grainger PLC Home Leads Accounts Contacts Opportunities

Unit **Commercial Unit Number 1**

Building Mariners Cottages, 1, South Shields, Tyne & W Block NE Postcodes Unit Status On the Market Available to View

Unit Details Lettings And Marketing Property Management Tenants Contact Details Key Documents **Related**

Price Book Entries (0) New

Products (1) New

Product Name	Created Date
Commercial Unit Number 1	19/02/2025, 17:29

View All

Now that a **Product** exists for the unit, a **Price Book Entry** can be created.

Click on the “New” button in the **Price Book Entries** section. The below screen will then be displayed.

7 | Page

The **Product** field needs to be the product that was just created for this unit. Start typing in the name of the product, and then select the correct record.

The screenshot shows the 'New Price Book Entry' form. The 'Product' field is highlighted with a red box. A dropdown menu is open, showing search results for 'commercial un'. A red arrow points to the 'Commercial Unit Number 1' option. The form includes fields for Price Book, Active status, Rent (Default), Rent Periodicity, Reason for Rent Change, Product Code, and Price change reason. Buttons for Cancel, Save & New, and Save are at the bottom.

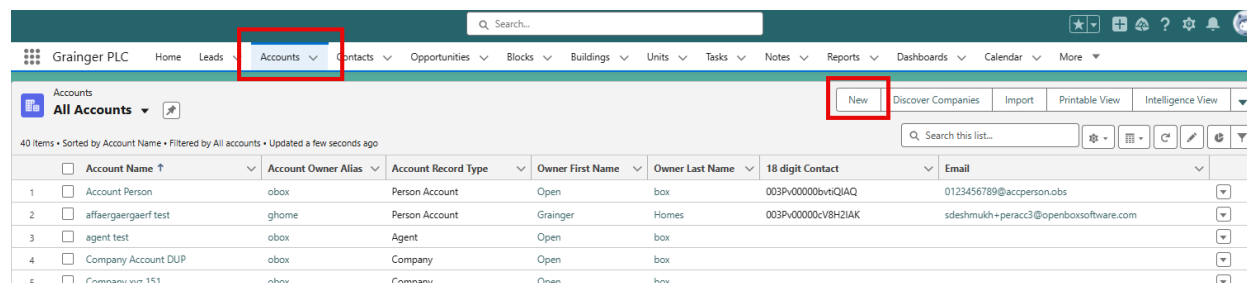
For the **Price Book** field, always select **Standard Price Book** and tick the box **Active**.

There is now a **Product** and **Price Book Entry** created for this Unit.

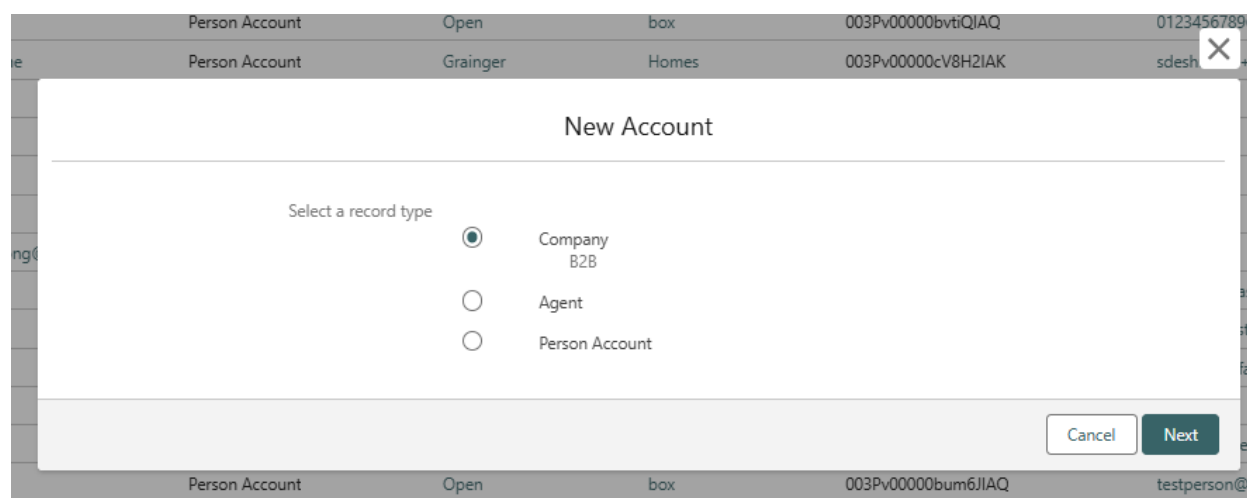
9 | Page

3. Receiving and Recording Offers

3.1 Creating a new Account and new Contacts



To create a new account, click on Accounts tab on the top ribbon and then click on the button “New”. The below screen will then be displayed. For the Commercial Lead to Lease Process, ‘**Company B2B**’ or ‘Person Account’ are the record types that must be selected.



Click Next and then input the relevant Account Details. This includes:

- Account Name
- Company Number
- Company Email
- Phone Number

Then click Save.

To create any **Contacts**, i.e. people that are related to this company which could be owners, tenants, points of contact etc, navigate to the Related Tab on the Account and then click “New” in the Contacts section.

The screenshot shows the 'Accounts' section for 'User Guide Ltd'. The 'Related' tab is selected, and the 'Contacts (0)' section is visible. A red box highlights the 'New' button in the top right corner of the 'Contacts' section.

The below screen will then display and the details of the person can be entered.

The 'New Contact: Agent' form is displayed. It includes the following sections and fields:

- Contact Information:**
 - * Name: First Name (Open), Last Name (Box)
 - Salutation: Honourable
 - Title: (empty)
 - Birthdate: (empty)
- Account Information:**
 - * Account Name: User Guide Ltd
 - 18 digit Contact: (empty)
- Address Information:**
 - Phone: 07123456799
 - Mobile: (empty)
 - Email: openbox@userguide.com
- Future Address:**
 - Future Street: (empty)
 - Future State/Province: (empty)

Buttons at the bottom: Cancel, Save & New, Save.

Clicking Save will then create this **Contact** and their details will be shown on the Account under the Contacts section on the related tab.

Account: **User Guide Ltd**

Type: Phone: 07000000000 Website: Account Owner: Stewart Blackford Company Number: 987654 Industry:

Related

Contacts (1) New

Open Box

Title: Email: openbox@userguide.com Phone: 07123456799

[View All](#)

3.2 Create a Commercial Opportunity

To create a new Commercial Opportunity, always use the button on the company or person account. This ensures that the relevant Contact to represent the Account is created and can be passed to Qube later on in the process.

Account: **User Guide Ltd**

Type: Phone: 07000000000 Website: Account Owner: Stewart Blackford Company Number: 987654 Industry:

Details **Related**

Account Information

Account Name: User Guide Ltd Pets: Company Number: 987654 RTR Expiry Date: RTR Time Limited:

Contact Information

Company Email: user@guides.com Different WhatsApp Number?: Phone: 07000000000 Opt into Marketing: ☐

Activity **Chatter**

We found no potential duplicates of this Account.

Upcoming & Overdue

No activities to show. Get started by sending an email, scheduling a task, and more.

No past activity. Past meetings and tasks marked as done show up here.

After clicking the “New Commercial Opportunity” button, the below screen will be displayed. Enter here the details of the Agents, both Local and National, as well as any Contacts from those agencies.

Select the correct **Agreement Type** from the picklist; either Commercial Lease or Commercial Licence.

Finally, enter the **Move In Date**. This can be an estimate as it is not always known right away when the tenant will take possession of the unit.

After clicking Save, a new opportunity will be created which will be visible from the Related Tab on the Account.

Note that a Contact has also been created called “. User Guide Ltd”.

Below is the newly created Opportunity. Along the top there is some key details, followed by a visual representation of the Commercial Leasing Journey, and then the remaining details.

The screenshot shows the 'User Guide Ltd' interface with the 'Offer Negotiation' stage selected. The top navigation bar includes links for Home, Leads, Accounts, Contacts, Opportunities, Blocks, Buildings, Units, Tasks, Reports, Dashboards, and Calendar. The main content area displays the 'Offer Negotiation' stage, with a progress bar showing stages from 'Offer Negotiation' to 'Closed'. The 'Offers (0)' section is visible, showing details for the 'User Guide Ltd' opportunity, including the account name, move-in date, agreed terms, unit, and rent. The 'Details' tab is active, showing a table of related parties and primary offer information.

Details	Files	Stepped Rent	Related
Opportunity Name	User Guide Ltd	Agreement Type	Commercial Lease
Opportunity Owner	Stewart Blackford	Use Type	Map Shop
Account Name	User Guide Ltd	Stage	Offer Negotiation
Tenancy Type	New	Sub Stage	
Related Parties			
Tenant Contact		National Agent	Company xyz 151
Guarantor		National Agent Contact	James Bond
Local Agent	Test Agent	Landlord Solicitor	
Local Agent Contact	John Brown	Solicitor Contact	
Primary Offer Information			

3.3 Create a Commercial Offer

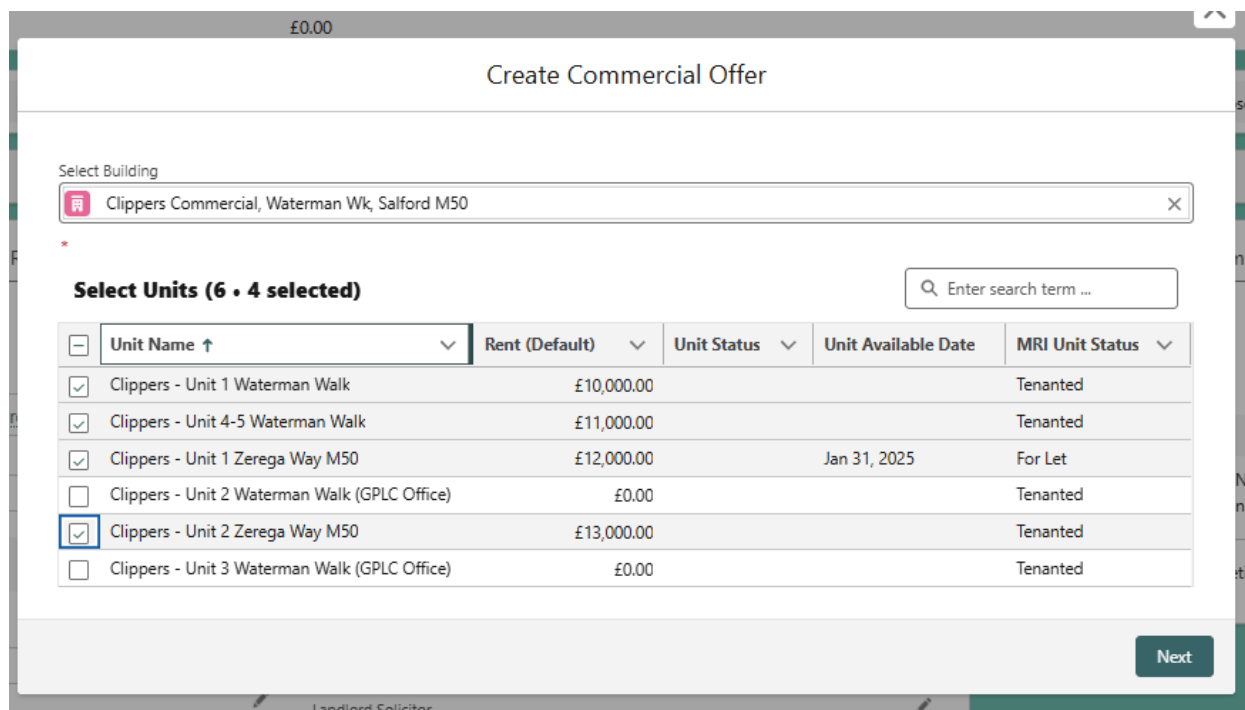
To create a commercial offer, click on the **Create Commercial Offer** button. This will then open up a window to select a building.

The screenshot shows the 'User Guide Ltd' interface with the 'Create Commercial Offer' button highlighted in a red box. The button is located in the top right corner of the main content area, next to the 'Submit for Approval', 'Log a Call', 'New Task', and 'New Event' buttons. The 'Offer Negotiation' stage is still selected, and the 'Offers (0)' section is visible.

The screenshot shows the 'Create Commercial Offer' window. The 'Select Building' search bar is active, and the search results for 'clipp' are displayed. The results include 'Clippers Commercial, Waterman Wk, Salford M50', 'Clippers - Ariel Apartments', 'Clippers - Ambassador Apartments', 'Clippers Amenity, Waterman Walk, M50 3AF', and 'Clippers - Car Parking'.

Selecting a building will then show units in that building that are 'Commercial Unit' record types. Selecting only one from the list will make that the 'Primary Unit'. Selecting more than one will mean that one of those will need to be selected to be the 'Primary Unit'.

The primary unit will be the unit that has all associated charges/payments etc. against it in Qube. Any other units will have 'ghost opportunities' so that the units are updated in Qube to be shown as let.



£0.00

Create Commercial Offer

Select Building

Clippers Commercial, Waterman Wk, Salford M50

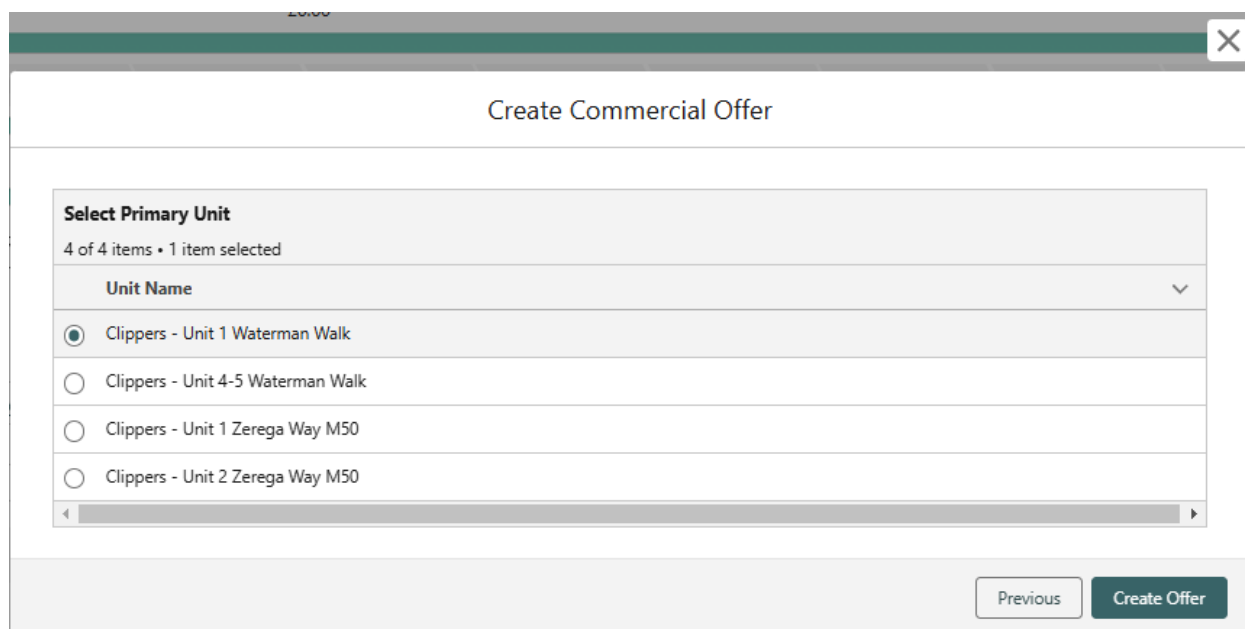
Select Units (6 • 4 selected)

Enter search term ...

<input type="checkbox"/>	Unit Name ↑	Rent (Default)	Unit Status	Unit Available Date	MRI Unit Status
<input checked="" type="checkbox"/>	Clippers - Unit 1 Waterman Walk	£10,000.00			Tenanted
<input checked="" type="checkbox"/>	Clippers - Unit 4-5 Waterman Walk	£11,000.00			Tenanted
<input checked="" type="checkbox"/>	Clippers - Unit 1 Zerega Way M50	£12,000.00		Jan 31, 2025	For Let
<input type="checkbox"/>	Clippers - Unit 2 Waterman Walk (GPLC Office)	£0.00			Tenanted
<input checked="" type="checkbox"/>	Clippers - Unit 2 Zerega Way M50	£13,000.00			Tenanted
<input type="checkbox"/>	Clippers - Unit 3 Waterman Walk (GPLC Office)	£0.00			Tenanted

Next

Landlord Solicitor



Create Commercial Offer

Select Primary Unit

4 of 4 items • 1 item selected

Unit Name

- ☒ Clippers - Unit 1 Waterman Walk
- ☐ Clippers - Unit 4-5 Waterman Walk
- ☐ Clippers - Unit 1 Zerega Way M50
- ☐ Clippers - Unit 2 Zerega Way M50

Previous Create Offer

Click on Create Offer to create the offer. The page will refresh and now the Offer record will be displayed.

On this page, all the relevant details are to be included for the offer that was received. Details from this offer will be shown on the related opportunity.

Offer

02/19/2025

Edit

Delete

Copy Offer

Offer Details

* Offer Name

02/19/2025

Status

In Negotiation

Primary Offer

☒

Account Name

User Guide Ltd

Unit

Clippers - Unit 1 Waterman Walk

X

Available Date

This field is calculated upon save

Rent

£46,000.00

This field is calculated upon save

Opportunity Name

User Guide Ltd

Agreement Type

Commercial Lease

View all dependencies

*Term

10 Years

View all dependencies

*Payment Periodicity

Available

Legal Quarters in ...

Chosen

Monthly in Advance

View all dependencies

Security Deposit Override

£15,000.00

Deposit to be Paid Back

£10,000.00

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Tenant incentives:

▼ Tenant Incentives

Rent Free Months

Capital Contributions

- Specify the number of *Rent Free Months* and the value of any *Capital Contributions*.

Break Clause Information:

▼ Break Clause Information

* Break Clause ⓘ

No break

--None--

✓ No break

Tenant Break

Landlord Break

Mutual Break

Rolling Break

- Choose the type of *Break Clause*. If 'No Break' is selected, the following fields will not show on the page. Any other selection will make them visible.

▼ Break Clause Information

* Break Clause ⓘ

Tenant Break

View all dependencies

First Break Clause Date

Break Clause Notice (Months)

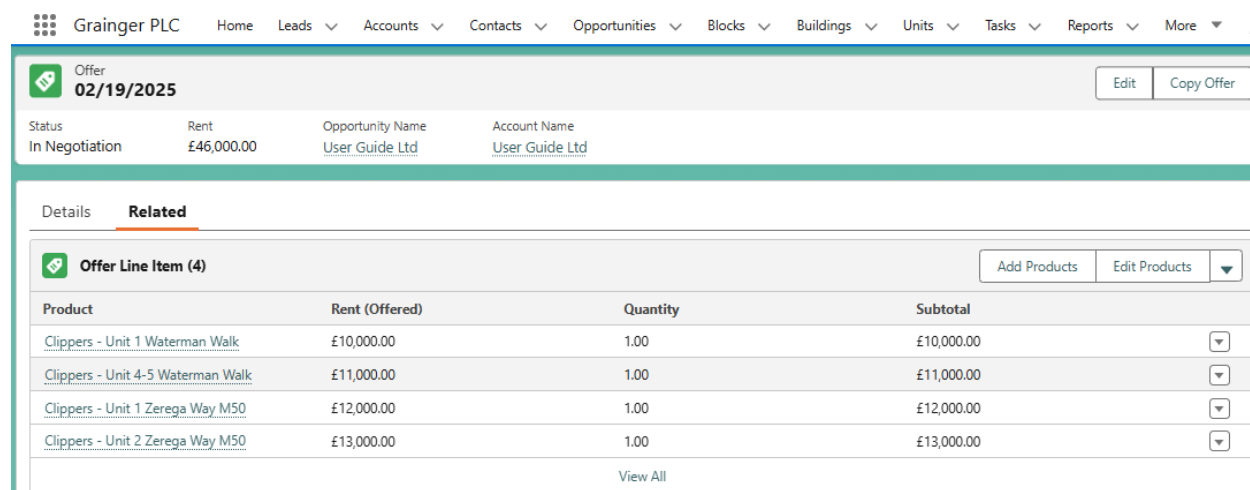
Months to First Break

- Specify the *Months To The First Break*.
 - This will then calculate the *First Break Clause Date* based on the *Move In Date*. If the move in date changes on the Opportunity, or the Months to First Break is changed, the date will be updated here.
- *Break Clause Notice Months*: Specify the notice each party needs to serve to exercise the break.

After the initial offer has been created, the offer should be immediately copied. This is to ensure that the initial offer submitted is captured and any subsequent changes can be worked on this newly created one. This will also ensure that the Offer is marked as 'Primary'

3.4 Update Offered Price

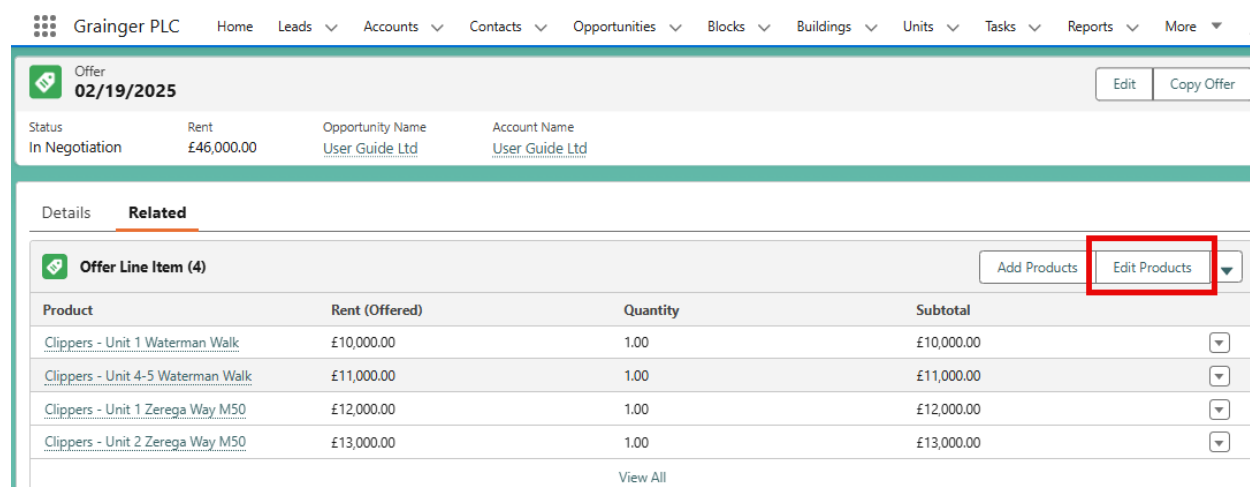
It is unlikely that an offer will always come in at the asking price. To change the price of the offer, the **Offer Line Item** needs to be updated. For an offer that has only one unit, there will be only one line item. If there are multiple units in the offer, there will be multiple line items.



The screenshot shows the 'Offer' page for '02/19/2025'. The status is 'In Negotiation' with a rent of £46,000.00. The opportunity and account names are 'User Guide Ltd'. Below the details, the 'Related' tab is active, showing the 'Offer Line Item (4)' table. The table has columns for Product, Rent (Offered), Quantity, and Subtotal. The products listed are 'Clippers - Unit 1 Waterman Walk', 'Clippers - Unit 4-5 Waterman Walk', 'Clippers - Unit 1 Zerega Way M50', and 'Clippers - Unit 2 Zerega Way M50', each with a quantity of 1.00 and a subtotal ranging from £10,000.00 to £13,000.00. There are 'Add Products' and 'Edit Products' buttons at the top right of the table.

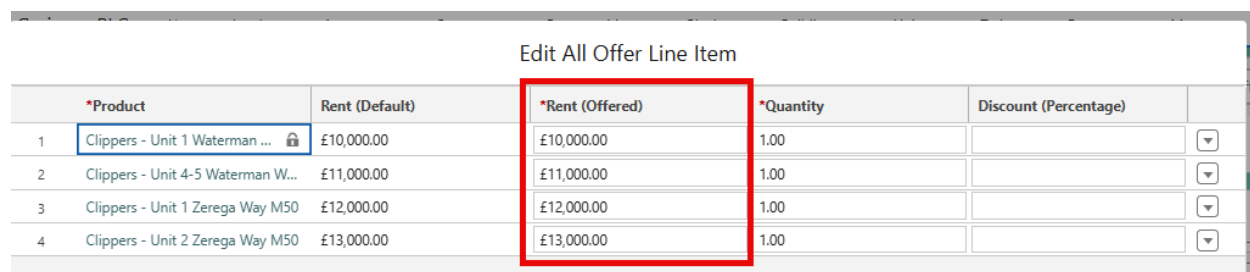
Product	Rent (Offered)	Quantity	Subtotal
Clippers - Unit 1 Waterman Walk	£10,000.00	1.00	£10,000.00
Clippers - Unit 4-5 Waterman Walk	£11,000.00	1.00	£11,000.00
Clippers - Unit 1 Zerega Way M50	£12,000.00	1.00	£12,000.00
Clippers - Unit 2 Zerega Way M50	£13,000.00	1.00	£13,000.00

The Rent (Offered) price defaults to the Marketing Price. To edit the offer price, click on the button 'Edit Products'.



This screenshot is identical to the previous one, but the 'Edit Products' button in the 'Offer Line Item (4)' table is highlighted with a red rectangle to indicate where to click to edit the offer prices.

This opens up a page where all the offer prices can be changed. The Rent (Default) field is the Price Book Entry price, ie. the Marketing or Quote price for the unit. Changing the Rent (Offered) field will update the offer to the rent that the potential tenant has actually offered.



The screenshot shows the 'Edit All Offer Line Item' page. It features a table with columns: *Product, Rent (Default), *Rent (Offered), *Quantity, and Discount (Percentage). The 'Rent (Offered)' column is highlighted with a red rectangle. The data rows show the same products as the previous screenshot, with their respective default rents and offered rents.

	*Product	Rent (Default)	*Rent (Offered)	*Quantity	Discount (Percentage)
1	Clippers - Unit 1 Waterman ...	£10,000.00	£10,000.00	1.00	
2	Clippers - Unit 4-5 Waterman W...	£11,000.00	£11,000.00	1.00	
3	Clippers - Unit 1 Zerega Way M50	£12,000.00	£12,000.00	1.00	
4	Clippers - Unit 2 Zerega Way M50	£13,000.00	£13,000.00	1.00	

The **Quantity** field should never change – it should always remain as '1.00'.

Edit All Offer Line Item

	*Product	Rent (Default)	*Rent (Offered)	*Quantity	Discount (Percentage)	
1	Clippers - Unit 1 Waterman Walk	£10,000.00	10000	1.00		▼
2	Clippers - Unit 4-5 Waterman W...	£11,000.00	10000	1.00		▼
3	Clippers - Unit 1 Zerega Way M50	£12,000.00	10000	1.00		▼
4	Clippers - Unit 2 Zerega Way M50	£13,000.00	10000	1.00		▼

Clicking Save will update the prices. This change, along with changes to other key offer information, is tracked on the [Offer History](#) too. The Offer History is found on the Related Tab on the Offer.

Offer History (6+)				
Date	Field	User	Original Value	New Value
2/19/2025, 5:20 PM	Rent	Stewart Blackford	£46,000	£40,000
2/19/2025, 4:37 PM	break Clause	Open box	no break	tenant break
2/19/2025, 4:57 PM	Term	Open box		10 Years
2/19/2025, 4:57 PM	Rent Free Months	Open box		12
2/19/2025, 4:57 PM	Capital Contributions	Open box		£10,000
2/19/2025, 4:57 PM	Break Clause Notice (Months)	Open box		6
View All				

3.5 Copying an Offer

Throughout the negotiation process, if there are terms that are changing from the original offer, it is important to capture each new offer with the updated details. This can be done easily by copying a previous offer.

In order to copy a previous offer, it firstly needs to not be marked as the Primary Offer. Uncheck this field if needed, mark the Status as 'Rejected', and then save the record. Then, by clicking the [Copy Offer](#) button.

Offer
02/19/2025

[Edit](#)
[Copy Offer](#)

Status	Rent	Opportunity Name	Account Name
In Negotiation	£40,000.00	User Guide Ltd	User Guide Ltd

Details

Related

Offer Details

Offer Name

02/19/2025

Status

In Negotiation

Primary Offer

☒

Account Name

User Guide Ltd

Unit

Clippers - Unit 1 Waterman Walk

Available Date

Rent

£40,000.00

Opportunity Name

User Guide Ltd

Agreement Type

Commercial Lease

Term

10 Years

Payment Periodicity

Monthly in Advance

Security Deposit Override

£15,000.00

Deposit to be Paid Back

£10,000.00

By clicking the Copy Offer button, a new offer will be created and marked as the Primary Offer. This new offer will be identical as the one before, so any changes can be made and there will be a full history of the negotiations. To make price changes follow [3.4 Update Offered Price](#), or make any other changes directly on the offer.

Offer

02/19/2025

EditCopy Offer

Status

Rent

Opportunity Name

Account Name

In Negotiation

£40,000.00

User Guide Ltd

User Guide Ltd

Details

Related

Offer Details

Offer Name

02/19/2025

Status

In Negotiation

Primary Offer

☒

Account Name

User Guide Ltd

Unit

Clippers - Unit 1 Waterman Walk

Available Date

Rent

£40,000.00

Opportunity Name

User Guide Ltd

Agreement Type

Commercial Lease

Term

20 Years

Payment Periodicity

Monthly in Advance

Security Deposit Override

£25,000.00

Deposit to be Paid Back

£10,000.00

Tenant Incentives

Rent Free Months

12

Capital Contributions

£10,000.00

Break Clause Information

Break Clause

Mutual Break

First Break Clause Date

3/12/2030

Break Clause Notice (Months)

6

Months to First Break

60

On the opportunity, all of the previous offers are also shown with some key information displayed to see the changes throughout the negotiaiton process.

Opportunity

User Guide Ltd

Create Commercial OfferSubmit for ApprovalLog a CallNew TaskNew Event

Account Name

Move-In Date

Agreed Terms

Unit

Rent

User Guide Ltd

3/12/2025

20 Years

Clippers - Unit 1 Waterman Walk

£40,000.00

Offer Negotia...

AM Approval

IC Approval

Heads of Terms

Legals

AFL

Lease Comple...

Audit

Fit Out

Closed

Mark Stage as Complete

Offers (2)

2 items • Updated 2 minutes ago

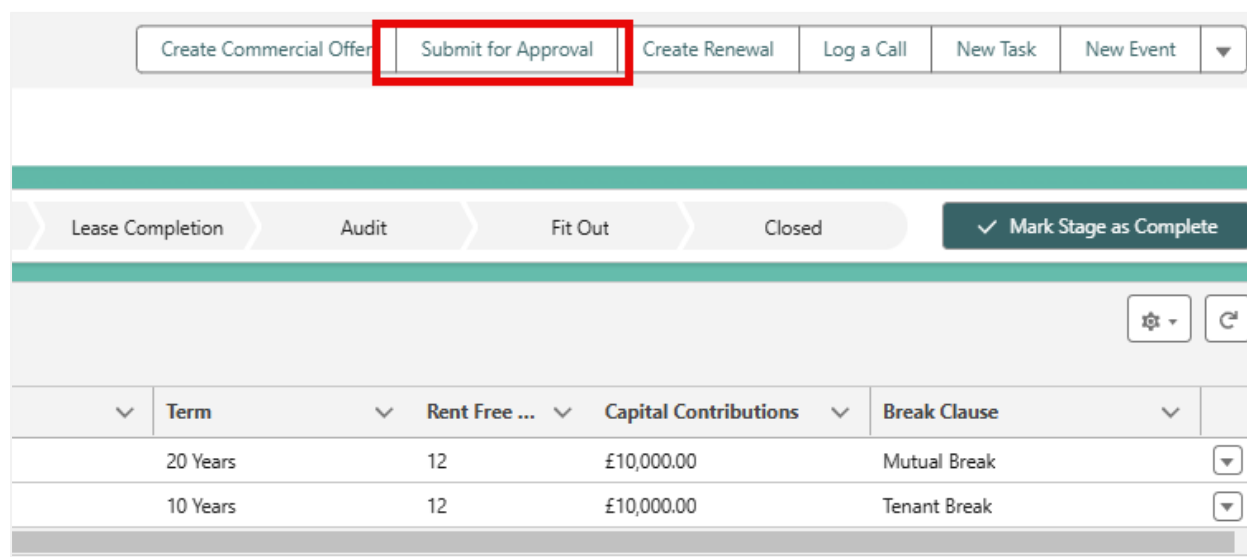
Offer Number	Offer Name	Status	Primary Of...	Rent	Term	Rent Free ...	Capital Contributions	Break Clause
1 00087469	02/19/2025	In Negotiation	<input type="checkbox"/>	£40,000.00	10 Years	12	£10,000.00	Tenant Break
2 00087470	02/19/2025	In Negotiation	<input checked="" type="checkbox"/>	£40,000.00	20 Years	12	£10,000.00	Mutual Break

View All

4. Asset Management and Investment Committee Approval

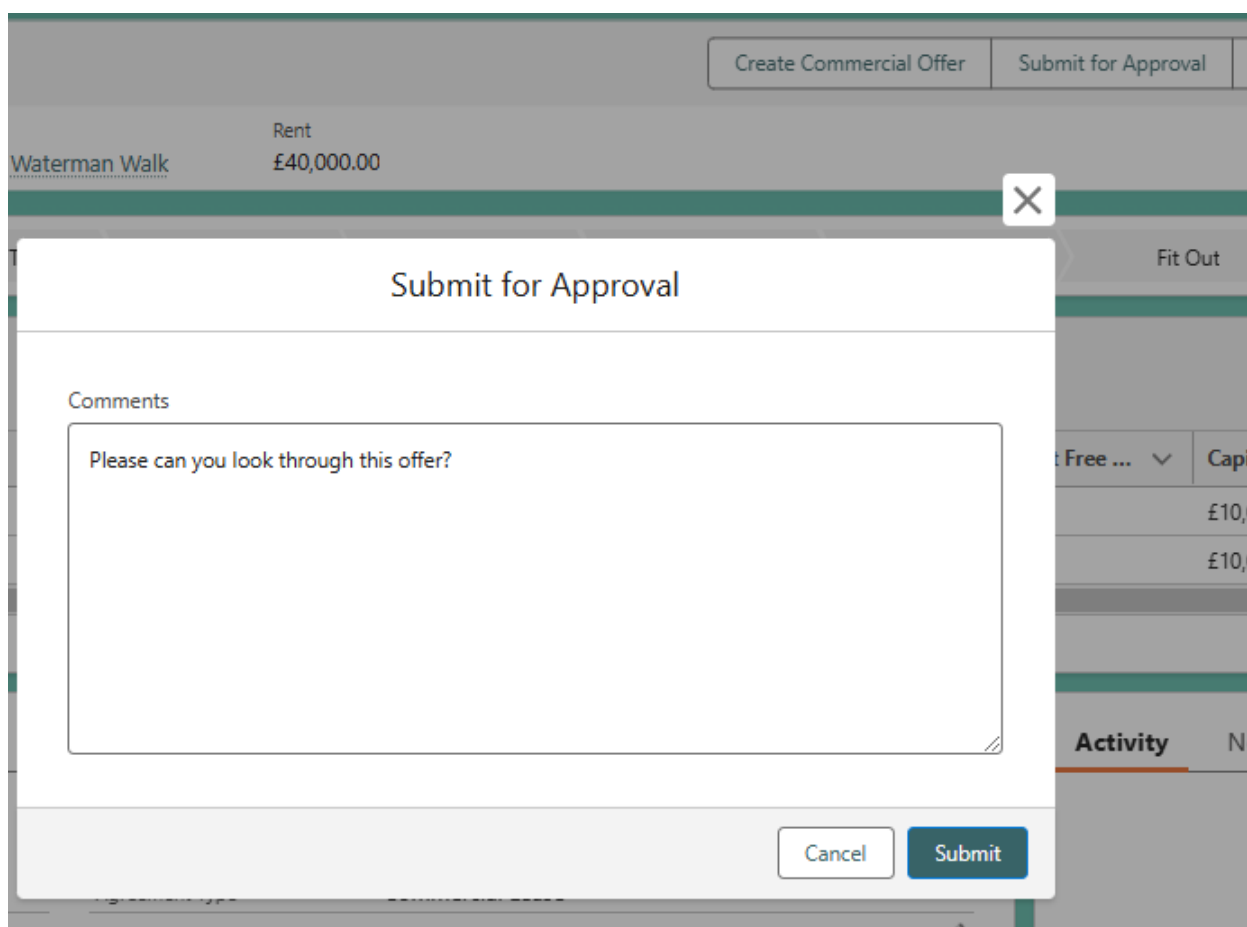
4.1 Asset Management Approval Process

Once an offer has been agreed to by the Commercial Lettings Team after the negotiations with the agent and/or tenant, the Asset Manager needs to approve. Clicking the **Submit for Approval** button will open a window where comments can be added for the Asset Manager.



The screenshot shows a software interface with a top navigation bar containing buttons: 'Create Commercial Offer', 'Submit for Approval' (highlighted with a red box), 'Create Renewal', 'Log a Call', 'New Task', and 'New Event'. Below this is a progress bar with stages: 'Lease Completion', 'Audit', 'Fit Out', and 'Closed'. A 'Mark Stage as Complete' button is on the right. Below the progress bar is a table with columns: 'Term', 'Rent Free ...', 'Capital Contributions', and 'Break Clause'. The table has two rows: '20 Years' with '12' and '£10,000.00' and 'Mutual Break'; and '10 Years' with '12' and '£10,000.00' and 'Tenant Break'.

Term	Rent Free ...	Capital Contributions	Break Clause
20 Years	12	£10,000.00	Mutual Break
10 Years	12	£10,000.00	Tenant Break



The screenshot shows a modal window titled 'Submit for Approval' with a close button (X) in the top right corner. The window has a 'Comments' section with a text area containing the text 'Please can you look through this offer?'. At the bottom of the modal are 'Cancel' and 'Submit' buttons. The background shows a blurred view of the software interface with a 'Waterman Walk' property listed at a rent of '£40,000.00'.

After clicking Submit, the opportunity will be locked from further editing, will be moved to the AM Approval stage, and there will be a visible Approval History on the Related Tab

Opportunity
User Guide Ltd

Account Name: User Guide Ltd | Move-In Date: 28/02/2025 | Agreed Terms: 20 Years | Unit: Clippers - Unit 1 Waterman Walk | Rent: £0.00

Progress: ✓ → **AM Approval** → IC Approval → Heads of Terms → Legals → AFL → Lease Completion → Audit

Offers (1)
1 item • Sorted by Primary Offer • Updated a minute ago

Offer Number	Offer Name	Status	Primary ...	Rent	Term	Rent Free Months
1 00087493	02/19/2025	In Negotiation	✓	£0.00	20 Years	12

View All

Details | Files | Stepped Rent | **Related**

Approval History (2)

Step Name	Date	Status	Assigned To
AM Commercial Lease Approval	26/02/2025, 15:22	Pending	Vicki Turnbull
Approval Request Submitted	26/02/2025, 15:22	Submitted	Open box

View All

The Approval will be sent to the User that is listed as the Asset Manager on the Unit. If this field is empty, an approval will not be able to be raised. This field is one that is mastered in Qube, so any changes of Asset Managers should be completed there.

Grainger PLC | Home | Leads | Accounts | Contacts | Opportunities | Tenancies | Blocks | Buildings

Unit
Clippers - Unit 1 Waterman Walk

Building: Clippers Commercial, Waterman Wk, Salford M50 | Block: Clippers - Commercial | Unit Status: | Bedrooms: Studio | Bathrooms: | P: |

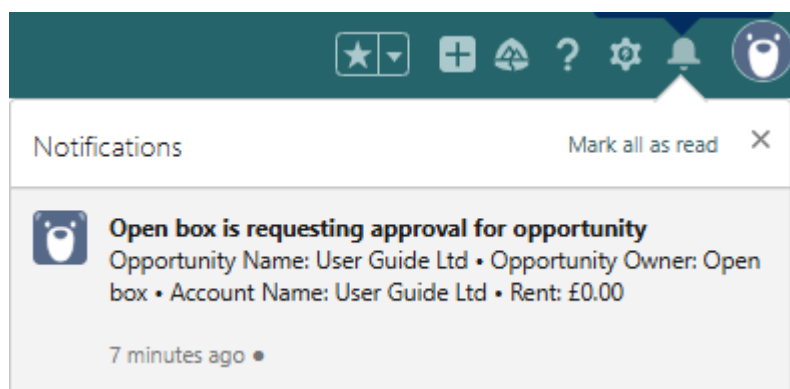
Unit Details | Lettings And Marketing | **Property Management** | Tenants Contact Details | More

Management Details

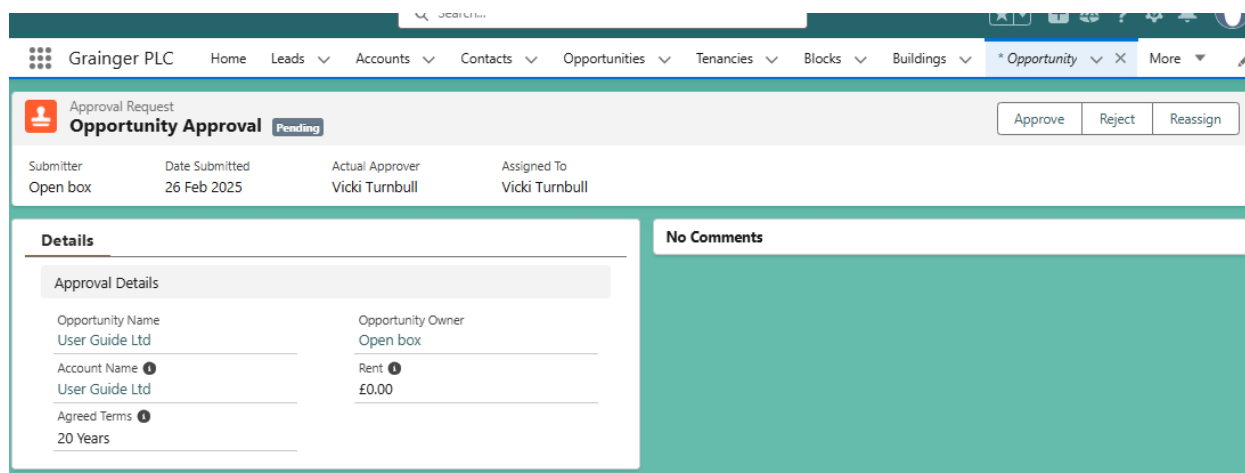
Unit Manager	Tom Crosthwaite	Asset Manager	Vicki Turnbull
Property Manager		Lettings Manager	Lucy Staniland
General Manager	Stewart Blackford	Tenancy Progressor	
Block Manager	Tom Crosthwaite	Renewals Negotiator	Lacey Malin
Landlord Name	Grainger Land and Regeneration Ltd	Managing Agent Name	Grainger Residential Management Ltd

The Asset Manager will receive both an email and a Salesforce Notification to prompt them to view the Approval Request.

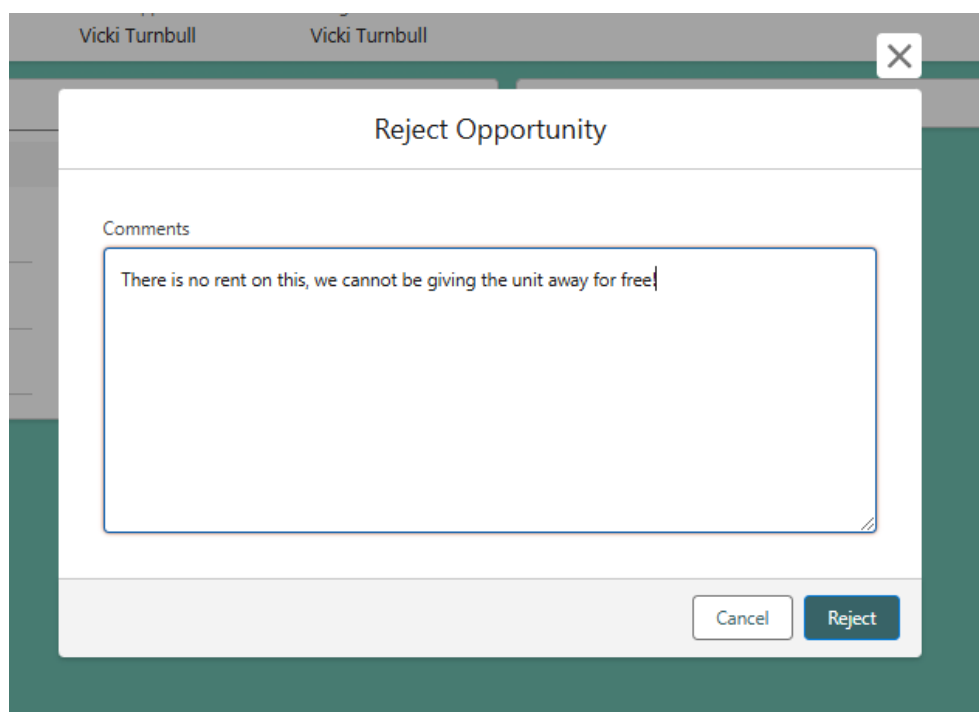
Navigation bar: Units | Tasks | Notes | Reports | More



When the Asset Manager goes into the Approval Request, there will be some basic details shown. The Asset Manager can click on the hyperlinked Opportunity Name to open the Opportunity and view all the details before either Approving or Rejecting or Reassign the Approval Request.



If the Approval Request is rejected, a comment must be entered.



After the Rejection, the comment will be shown on the Approval Request. It will show that it has been rejected on both the Approval Request and on the Opportunity's Approval History.

Process Instance Step
Opportunity Approval Rejected

Submitter

Open box

Date Submitted

26 Feb 2025

Actual Approver

Vicki Turnbull

Assigned To

Vicki Turnbull

Details

Approval Details

Opportunity Name

User Guide Ltd

Opportunity Owner

Open box

Account Name

User Guide Ltd

Rent

£0.00

Agreed Terms

20 Years

Approver Comments

Vicki Turnbull

There is no rent on this, we cannot be giving the unit away for free!

26 Feb 2025, 13:39:22

The Stage also moves back to *In Negotiation*, so that the Commercial Leasing Team can either make a new offer or close the opportunity if there is no further chance of improvements.

Opportunity
User Guide Ltd

Account Name

User Guide Ltd

Move-In Date

2/28/2025

Agreed Terms

20 Years

Unit

Clippers - Unit 1 Waterman Walk

Rent

£0.00

Offer Negotiation

AM Approval

IC Approval

Heads of Terms

Legals

AFL

Lease Completion

Audi

Offers (1)

1 item • Sorted by Offer Name • Updated a few seconds ago

Offer Number	Offer Name	Status	Primary Of...	Rent	Term	Break Clause
1 00087493	02/19/2025	In Negotiation	<input checked="" type="checkbox"/>	£0.00	20 Years	Tenant Break

View All

Details

Files

Stepped Rent

Related

Approval History (2)

Step Name	Date	Status	Assigned To
AM Commercial Lease Approval	2/26/2025, 1:39 PM	Rejected	Vicki Turnbull
Approval Request Submitted	2/26/2025, 1:22 PM	Submitted	Open box

View All

To submit again, follow the same process – all the different Approvals will be listed on the Related Tab for a full history. This time the Asset Manager wants to approve the Request. Again a comment should be added so there is a history.

Process Instance Step
Opportunity Approval Approved

Submitter

Stewart Blackford

Date Submitted

26 Feb 2025

Actual Approver

Vicki Turnbull

Assigned To

Vicki Turnbull

Details

Approval Details

Opportunity Name

User Guide Ltd

Opportunity Owner

Open box

Account Name

User Guide Ltd

Rent

£75,000.00

Agreed Terms

20 Years

Approver Comments

Vicki Turnbull

Much better, happy with this!

26 Feb 2025, 13:52:44

Again the related list on the Opportunity will reflect this approval and the stage will move on to **IC Approval** stage automatically.

Opportunity
User Guide Ltd

Account Name: User Guide Ltd | Move-In Date: 2/28/2025 | Agreed Terms: 20 Years | Unit: Clippers - Unit 1 Waterman Walk | Rent: £75,000.00

Process Flow: > > **IC Approval** > Heads of Terms > Legals > AFL > Lease Completion > Audit

Offers (1)
1 Item • Sorted by Offer Name • Updated a few seconds ago

Offer Number	Offer Name	Status	Primary Of...	Rent	Term	Break Clause
1 00087493	02/19/2025	In Negotiation	<input checked="" type="checkbox"/>	£75,000.00	20 Years	Tenant Break

[View All](#)

Related

Approval History (4)

Step Name	Date	Status	Assigned To
AM Commercial Lease Approval	2/26/2025, 1:52 PM	Approved	Vicki Turnbull
Approval Request Submitted	2/26/2025, 1:51 PM	Submitted	Stewart Blackford
AM Commercial Lease Approval	2/26/2025, 1:39 PM	Rejected	Vicki Turnbull

Further to this, the date as well as the AM comments are saved to the opportunity under the Approval Section. Once the IC Approval has been obtained, and the stage marked as complete, the IC Sign Off Date will also be stamped with the completion date.

Approval

AM Comment Much better, happy with this! [Lost Reason](#)

AM Sign Off Date 2/26/2025

IC Sign Off Date

5. Progressing or Closing the Commercial Opportunity

After the IC has approved the offer, the opportunity can now be progressed throughout the rest of the commercial leasing journey.

5.1 Capturing Comments & Delays

Progressing through the process, further information can be captured directly on the opportunity. This could include notes for delays and comments

Activity

New Comment

Chatter

Type

--None--

Comments

Date

26 Feb 2025

Save

Activity

New Comment

Chatter

Type

--None--

--None--

General Comment

Landlord Lawyer Delay

Renegotiation

Technical Delay

Tenant Delay

Tenant Lawyer Delay

Comments

Date

Save

Activity

New Comment

Chatter

Type

General Comment

Comments

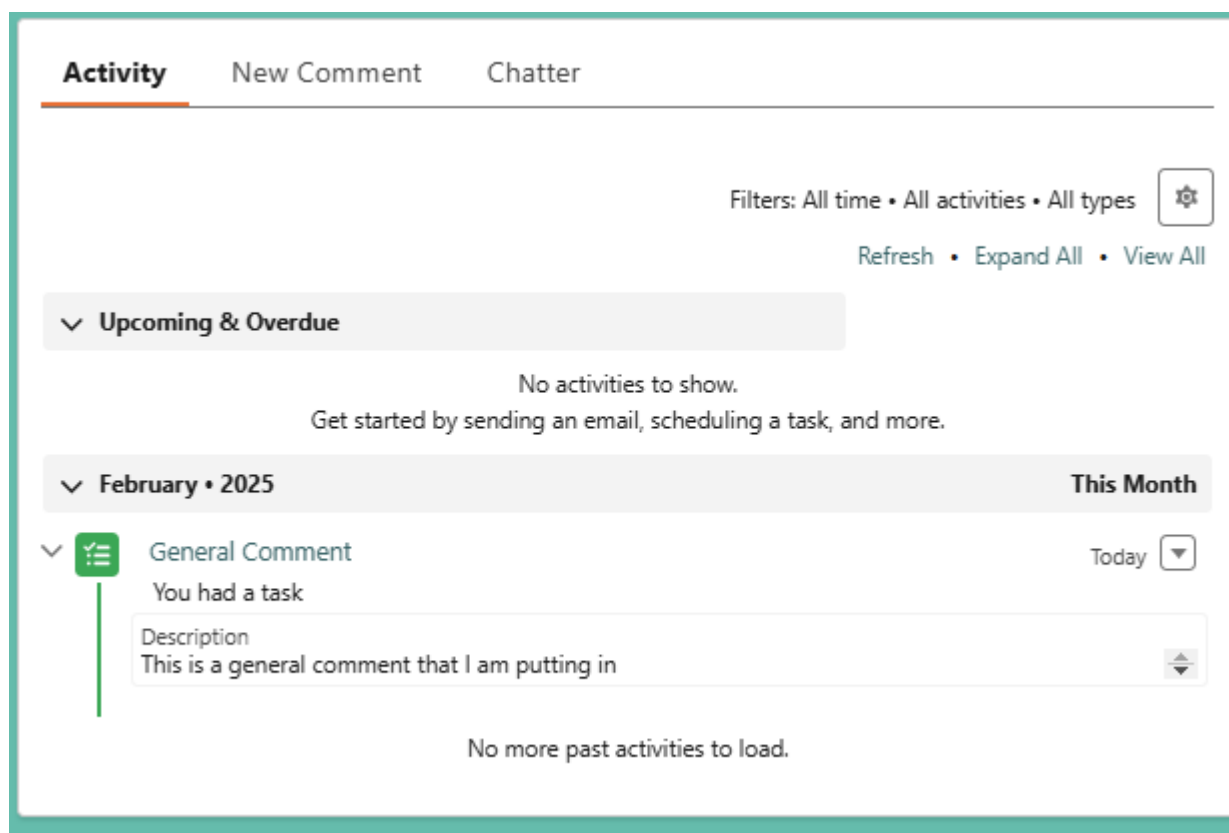
This is a general comment that I am putting in

Date

26 Feb 2025

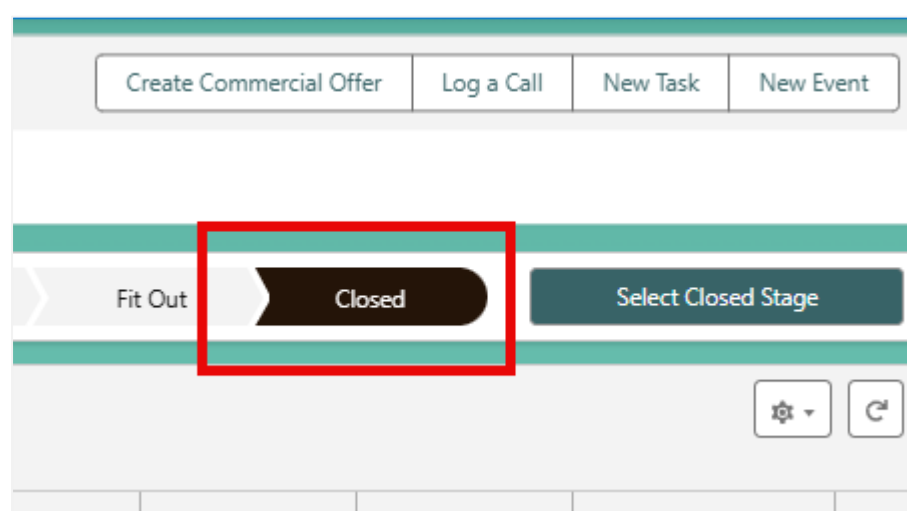
Save

Clicking Save will add this to the Activity Timeline and show all comments/updates that have occurred on the Opportunity.



5.2 Closing a Rejected Opportunity

If the Asset Manager or the IC reject the offer, and it cannot be improved, or Grainger do not want to continue, the Opportunity can be closed. To close an Opportunity, select the **Closed** stage on the path and click Select Closed Stage.



This will open a window where more details can be captured. Make sure to change the Stage to Close Lost, and provide both a Lost Reason and indicate the team that rejected the offer in Sub Stage.

Edit Dependencies

*Stage

Closed Lost

Lost Reason

--None--

Sub Stage

--None--

Cancel

Done

Edit Dependencies

*Stage

Closed Lost

Lost Reason

--None--

✓ --None--

Unsuitable Usage

Required Additional Cap Con

Cancel

Done

Edit Dependencies

*Stage

Closed Lost

Lost Reason

--None--

Sub Stage

--None--

✓ --None--

Rejected by Leasing

Rejected by AM

Rejected by IC

Cancel








Done

6. Initial Integration to Qube

The Commercial Opportunity will be integrated to Qube initially when the **Deposit Paid / Create Future Tenancy** checkbox is marked as true. When this is ticked, any Shadow Opportunities will be created for the additional units in the offer, dummy tenants will be created in Qube.

Once the checkbox is marked as true, it is not possible to uncheck it, as the details have already passed to Qube. As for the Shadow Opportunities, users will not see these anywhere and are only used in the background to ensure that all units in Qube are updated as required.

▼ Legals

Legals Instructed Date		Deposit Paid / Create Future Tenancy  <input checked="" type="checkbox"/>	
Draft Lease Received		Tenancy Signing Date Grainger	
Estimated Completion Date		Tenancy Signing Date Tenant(s)	
Completed Lease Received	