

# User Guide:

## Commercial Lead to Lease

### Version History

| Version | Description of Change   | Author         | Date       |
|---------|---|----------------|------------|
| 0.1     | First Draft   | Jacob Smycz    | 17/03/2025 |
| 2.0     | §2.1 updated – standard price book rent entry auto-created on adding new product. | Nikki Papenfus | 07/08/2025 |

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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
- Receiving 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 be 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 Grainger PLC software interface. At the top, there is a navigation bar with various menu items like Home, Leads, Accounts, Contacts, Tenancies, Opportunities, Blocks, Buildings, Units, Tasks, Notes, Reports, Dashboards, and More. Below the navigation bar, the main content area displays information for "Commercial Unit 2, 1 Springwell Sq". The unit details include Building: The Condor - Commercial, Block: The Condor - Commercial, Unit Status: Tenanted, Bedrooms: Studio, and Bathrooms: 0. A "Priority Flag" is also present. On the right side of the screen, there is a sidebar with sections for Upcoming & Overdue activities, a feed with options to Post, Poll, or Question, and a search bar.

| 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  |

[View All](#)

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

The screenshot shows the "Price Book Entry" form for "Commercial Unit 2, 1 Springwell Sq". The form has a "Edit" and "Delete" button at the top right. The "Information" section contains the following fields:

- Product: Commercial Unit 2, 1 Springwell Sq
- Price Book: Standard Price Book
- Active:
- Rent (Default): £10,000.00 (highlighted with a red box)
- Rent Periodicity: Annual (highlighted with a red box)
- Reason for Rent Change: Agent advised to drop
- Product Code: (empty)

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'.

The screenshot shows a Salesforce page for a 'Price Book Entry'. The entry details are as follows:

- Product: Commercial Unit 2, 1 Springwell Sq
- Price Book: Standard Price Book
- Active: Yes
- Rent (Default): £10,000.00
- Rent Periodicity: Annual
- Reason for Rent Change: Agent advised to drop

A red box highlights the 'Reason for Rent Change' field. Below the entry, a table titled 'Price Book Entry History (6)' is displayed, showing the following changes:

| 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        | Agent 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        |                       | Agent advised to drop |
| 30/01/2025, 10:58 | Created.               | Open box        |                       | Agent advised to drop |

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

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** will need to be created and the **Standard Price Book Entry** will need to be updated.

The screenshot shows a Salesforce page for a 'Unit' record. The unit details are as follows:

- Building: Mariners Cottages, 1, South Shields, Tyneside & Wear
- Block: NE Postcodes
- Unit Status: On the Market Available to View

The 'Related' tab is selected, showing the following sections:

- Price Book Entries (0)**: A red box highlights this section.
- Products (0)**: A red box highlights this section. To its right is a 'New' button, also highlighted with a red box.

A **Product** first needs to be created. 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.

New Product

\* = Required Information

**Product Information**

|                        |                          |                      |                                     |
|------------------------|--------------------------|----------------------|-------------------------------------|
| * Product Name         | Commercial Unit Number 1 | Active               | <input checked="" type="checkbox"/> |
| Product Code           |                          | Latest ERV           |                                     |
| Unit                   | Commercial Unit Number 1 | Latest ERV Pricebook | Search Price Books...               |
| Product Description    |                          |                      |                                     |
| Previous ERV           |                          |                      |                                     |
| Previous ERV Pricebook | Search Price Books...    |                      |                                     |

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)**

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

New

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

Building  
Mariners Cottages, 1, South Shields, Tyne & W

Block  
NE Postcodes

Unit Status  
On the Market Available to View

Bedrooms  
Bathrooms  
Priority Flag

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

**Price Book Entries (0)**

**Products (1)**

| Product Name             | Created Date      |
|--------------------------|-------------------|
| Commercial Unit Number 1 | 08/08/2025, 15:21 |

[View All](#)

Click on the “Refresh” button in the **Price Book Entries** section.

Building  
Mariners Cottages, 1, South Shields, Tyne & W

Block  
NE Postcodes

Unit Status  
On the Market Available to View

Bedrooms  
Bathrooms  
Priority Flag

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

**Price Book Entries (29)**

| Price Book               | Price Book Entry         | Rent (Default) | Rent Periodicity | Reason for Rent Change |
|--------------------------|--------------------------|----------------|------------------|------------------------|
| Standard Price Book      | Commercial Unit Number 1 | £0.00          | Monthly          |                        |
| Price Book Rent Sep 2025 | Commercial Unit Number 1 | £0.00          | Monthly          |                        |
| Price Book Rent Oct 2025 | Commercial Unit Number 1 | £0.00          | Monthly          |                        |
| Price Book Rent Nov 2025 | Commercial Unit Number 1 | £0.00          | Monthly          |                        |

[View All](#)

**Products (1)**

| Product Name             | Created Date      |
|--------------------------|-------------------|
| Commercial Unit Number 1 | 08/08/2025, 14:26 |

[View All](#)

Then select the price book entry for the **Standard Price Book**.

The below screen will display:

**Price Book Entry**  
**Commercial Unit Number 1**

**Information**

|                        |                                     |
|------------------------|-------------------------------------|
| Product                | Commercial Unit Number 1            |
| Price Book             | Standard Price Book                 |
| Active                 | <input checked="" type="checkbox"/> |
| Rent (Default)         | £0.00                               |
| Rent Periodicity       | Monthly                             |
| Reason for Rent Change |                                     |
| Product Code           |                                     |

**Edit**   **Delete**

Update the **Rent (Default)** amount and update the **Rent Periodicity** to 'Annual'. Ensure the 'Active' box is ticked.

Price Book Entry  
Commercial Unit Number 1

Product: Commercial Unit Number 1  
Price Book: Standard Price Book  
Active:

\* Rent (Default): £12,345.00  
\* Rent Periodicity: Annual

Reason for Rent Change:

Product Code:

**Save**

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

Unit  
Commercial Unit Number 1

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

| Unit Details                   | Lettings And Marketing   | Property Management | Tenants Contact Details | Key Documents          | Related    |
|--------------------------------|--------------------------|---------------------|-------------------------|------------------------|------------|
| <b>Price Book Entries (29)</b> |                          |                     |                         |                        |            |
| Price Book                     | Price Book Entry         | Rent (Default)      | Rent Periodicity        | Reason for Rent Change |            |
| Standard Price Book            | Commercial Unit Number 1 | £12,345.00          | Annual                  |                        | <b>New</b> |
| Price Book Rent Sep 2025       | Commercial Unit Number 1 | £0.00               | Monthly                 |                        |            |
| Price Book Rent Oct 2025       | Commercial Unit Number 1 | £0.00               | Monthly                 |                        |            |
| Price Book Rent Nov 2025       | Commercial Unit Number 1 | £0.00               | Monthly                 |                        |            |
| <b>Products (1)</b>            |                          |                     |                         |                        |            |
| Product Name                   | Created Date             |                     |                         |                        |            |
| Commercial Unit Number 1       | 08/08/2025, 14:26        |                     |                         |                        | <b>New</b> |

### 3. Receiving and Recording Offers

#### 3.1 Creating a new Account and new Contacts

The screenshot shows the software's main menu bar with various tabs like Home, Leads, Accounts, Contacts, Opportunities, etc. The 'Accounts' tab is currently selected and highlighted with a red box. Below the menu, there's a search bar and a toolbar with icons for Discover Companies, Import, Printable View, and Intelligence View. A large table below displays 'All Accounts' with columns for Account Name, Account Owner Alias, Account Record Type, Owner First Name, Owner Last Name, 18 digit Contact, and Email. The 'New' button in the top right corner of the table area is also highlighted with a red box.

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.

This is a modal dialog box titled 'New Account'. It asks 'Select a record type' and has three options: 'Company B2B' (selected), 'Agent', and 'Person Account'. At the bottom are 'Cancel' and 'Next' buttons. The background of the dialog shows some account details: Person Account, Open, box, 003Pv00000bvtIQAQ, 0123456789@. The 'Next' button is highlighted with a red box.

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 Grainger PLC software interface. At the top, there's a navigation bar with links like Home, Leads, Accounts, Contacts, Opportunities, Blocks, Buildings, Units, Tasks, Reports, and Dash. Below the navigation bar, the account details for 'User Guide Ltd' are displayed, including Type (Phone), Website, Account Owner (Stewart Blackford), Company Number (987654), and Industry. The 'Related' tab is selected, showing the 'Contacts (0)' section. A red box highlights the 'New' button in the bottom right corner of this section.

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

The screenshot shows the 'New Contact: Agent' form. It has three main sections: 'Contact Information', 'Contact Information', and 'Address Information'. The 'Name' section is highlighted in yellow. In the 'Contact Information' section, there are fields for Name (Salutation: Honourable, First Name: Open, Last Name: Box), Title, Birthdate, Phone (07123456799), Email (openbox@userguide.com), and Mobile. In the 'Address Information' section, there are fields for Current Address (Current Street) and Future Address (Future Street). At the bottom, there are buttons for Cancel, Save & New, and Save. The 'Save' button is highlighted with a red box.

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

The screenshot shows the Grainger PLC CRM system. At the top, there's a navigation bar with links like Home, Leads, Accounts, Contacts, Opportunities, Blocks, Buildings, Units, Tasks, Reports, and Dashboards. Below the navigation is a search bar. The main area displays the 'User Guide Ltd' account details. Under the 'Details' tab, you can see basic information such as Type (Account), Phone (07000000000), Website, Account Owner (Stewart Blackford), Company Number (987654), and Industry. The 'Related' tab is currently selected, showing a list of contacts associated with this account. One contact, 'Open Box', is listed with the email address openbox@userguide.com. There are buttons for 'New' and '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.

This screenshot shows the same 'User Guide Ltd' account page as the previous one, but with a focus on the 'New Commercial Opportunity' button located in the top right corner of the header. This button is highlighted with a red box. The rest of the page includes the standard account details, related contacts, and activity feed.

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.

New Commercial Opportunity

\* Opportunity Name: User Guide Ltd

\* Account Name: User Guide Ltd

\* Agreement Type: --None--

Use Type: [empty]

\* Move In Date: [empty]

Local Agent: Search Accounts... [Search icon]

Local Agent Contact: Search Contacts... [Search icon]

National Agent: Search Accounts... [Search icon]

National Agent Contact: Search Contacts... [Search icon]

**Save**

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

\* Account Name: User Guide Ltd

\* Agreement Type:

- None--
- None--
- Commercial Lease**
- Commercial License**
- AST
- AST (Affordable)
- Non-Housing (Company)
- Live Work
- Parking Licence
- Shed Licence
- Occupation Licence
- Occupation Contract

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.

New Commercial Opportunity

\* Opportunity Name: User Guide Ltd

\* Account Name: User Guide Ltd

\* Agreement Type: Commercial Lease

Local Agent: Test Agent

Local Agent Contact: John Brown

National Agent: Company xyz 151

National Agent Contact: James Bond

Use Type: Map Shop

\* Move In Date: Mar 12, 2025

**Save**

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

Account  
**User Guide Ltd**

Type Phone Website Account Owner Company Number Industry

070000000000 Stewart Blackford 987654

Details **Related**

**Contacts (2)**

- Open Box
- . User Guide Ltd

**Opportunities (1)**

|                |                          |
|----------------|--------------------------|
| User Guide Ltd | Stage: Offer Negotiation |
| Amount:        | (not specified)          |
| Close Date:    | 3/19/2025                |

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 Grainger PLC Opportunity page for the account 'User Guide Ltd'. The opportunity name is 'User Guide Ltd', move-in date is '3/12/2025', agreed terms, unit, and rent are all listed as £0.00. The stage is 'Offer Negotiation'. The top navigation bar includes Home, Leads, Accounts, Contacts, Opportunities, Blocks, Buildings, Units, Tasks, Reports, Dashboards, and Calendar. Below the main content, there are tabs for Offer Negotiation, AM Approval, IC Approval, Heads of Terms, Legals, AFL, Lease Completion, Audit, Fit Out, Closed, and a button to 'Mark Stage as Complete'. A sidebar on the right shows activity, new comment, and chatter sections.

### 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 'Create Commercial Offer' modal. At the top, it says 'Create Commercial Offer'. Below that is a search bar with the placeholder 'Select Building' and the input 'clipp'. A dropdown menu lists several building options: 'Clippers Commercial, Waterman Wk, Salford M50', 'Clippers - Ariel Apartments', 'Clippers - Ambassador Apartments', 'Clippers Amenity, Waterman Walk, M50 3AF', and 'Clippers - Car Parking'. The first item, 'Clippers Commercial, Waterman Wk, Salford M50', is highlighted. The background shows the Grainger PLC Opportunity page for 'User Guide Ltd' with the 'Offer Negotiation' stage.

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.

**Create Commercial Offer**

Select Building  
Clippers Commercial, Waterman Wk, Salford M50

**Select Units (6 • 4 selected)**

| Unit Name                                     | Rent (Default) | Unit Status | Unit Available Date | MRI Unit Status |
|---|----------------|-------------|---------------------|-----------------|
| Clippers - Unit 1 Waterman Walk               | £10,000.00     | Tenanted    |                     |                 |
| Clippers - Unit 4-5 Waterman Walk             | £11,000.00     | Tenanted    |                     |                 |
| Clippers - Unit 1 Zerega Way M50              | £12,000.00     | For Let     | Jan 31, 2025        |                 |
| Clippers - Unit 2 Waterman Walk (GPLC Office) | £0.00          | Tenanted    |                     |                 |
| Clippers - Unit 2 Zerega Way M50              | £13,000.00     | Tenanted    |                     |                 |
| Clippers - Unit 3 Waterman Walk (GPLC Office) | £0.00          | Tenanted    |                     |                 |

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.

The screenshot shows a software application window for 'Grainger PLC'. At the top, there's a navigation bar with links like Home, Leads, Accounts, Contacts, Opportunities, Blocks, Buildings, Units, Tasks, and More. A search bar is at the top right. Below the navigation, a header bar displays 'Offer 02/19/2025'. The main content area shows basic offer details: Status (In Negotiation), Rent (£46,000.00), Opportunity Name (User Guide Ltd), and Account Name (User Guide Ltd). Below this, there are tabs for 'Details' and 'Related'. Under 'Offer Details', there's a table with fields for Offer Name (02/19/2025), Status (In Negotiation), Primary Offer (checkbox checked), Account Name (User Guide Ltd), Unit (Clippers - Unit 1 Waterman Walk), Available Date (calculated upon save), Rent (£46,000.00), Opportunity Name (User Guide Ltd), Agreement Type (Commercial Lease), Term (checkbox checked), Payment Periodicity (checkbox checked), Security Deposit Override (checkbox checked), and Deposit to be Paid Back (checkbox checked).

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 Details:

This screenshot shows the 'Offer Details' form. It includes fields for Offer Name (02/19/2025), Status (In Negotiation), Primary Offer (checkbox checked), Account Name (User Guide Ltd), Unit (Clippers - Unit 1 Waterman Walk), 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), Term (10 Years), Payment Periodicity (Legal Quarters in Advance, chosen as Monthly in Advance), Security Deposit Override (£15,000.00), and Deposit to be Paid Back (£10,000.00).

- Select the *Term*. This will then allow the user to add break clause information later
- Choose the *Payment Periodicity*
- Add in Deposit information
  - o *Security Deposit Override* – Input the amount for the deposit.

## Tenant incentives:

▼ Tenant Incentives

|                  |    |                       |            |
|------------------|----|-----------------------|------------|
| Rent Free Months | 12 | Capital Contributions | £10,000.00 |
|------------------|----|-----------------------|------------|

- 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 !

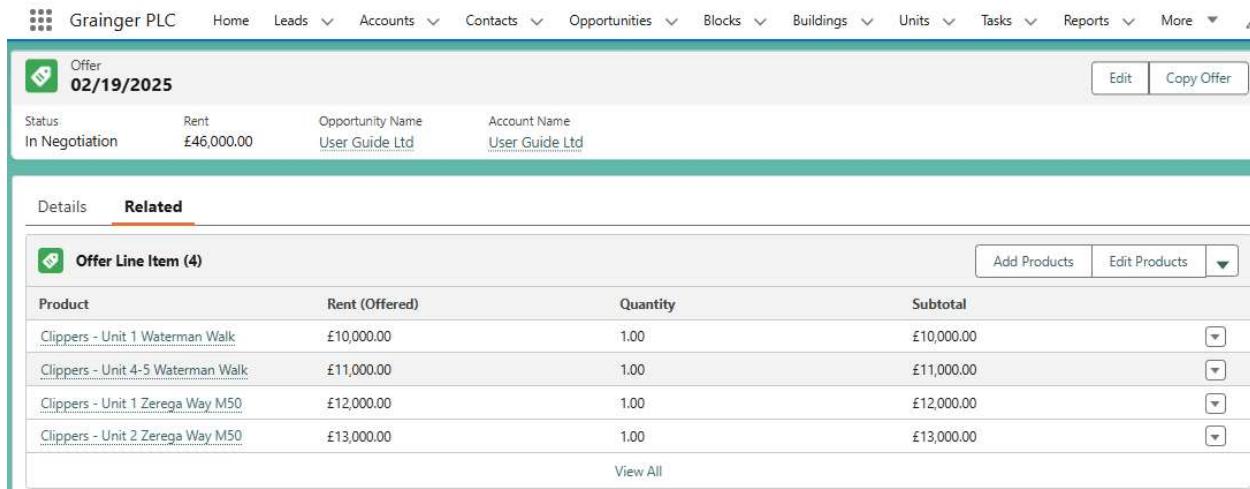
|                              |                         |                       |    |
|------------------------------|-------------------------|-----------------------|----|
| Tenant Break                 | First Break Clause Date | 12/03/2027            |    |
| View all dependencies        |                         |                       |    |
| Break Clause Notice (Months) | 6                       | Months to First Break | 24 |

- Specify the *Months To The First Break*.
  - o 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

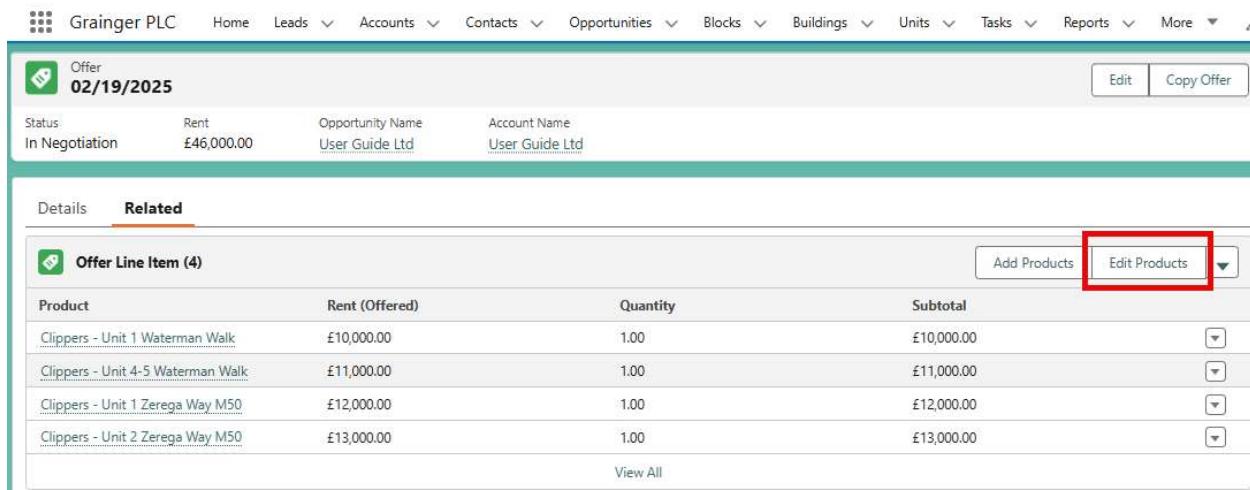
It is unlikely that an offer will always come in at the asking price. To change the price of the offer, the **Offer Line Item** needs to be updated. For an offer that has only one unit, there will be only one line item. If there are multiple units in the offer, there will be multiple line items.



The screenshot shows the 'Offer' page for an offer made on 02/19/2025. The offer is in negotiation, with a rent of £46,000.00. The opportunity name is 'User Guide Ltd'. The 'Related' tab is selected, showing a table of 'Offer Line Item (4)'. The table details four line items for 'Clippers' units across different locations (Waterman Walk and Zerega Way M50), each with a quantity of 1.00 and a subtotal of £10,000.00, £11,000.00, £12,000.00, and £13,000.00 respectively. Buttons for 'Add Products' and 'Edit Products' are visible 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 shows the same 'Offer' page as above, but the 'Edit Products' button in the 'Offer Line Item (4)' table header is highlighted with a red box. The rest of the interface is identical to the previous screenshot.

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' dialog box. It lists four offer line items with their current Rent (Offered) values: £10,000.00, £11,000.00, £12,000.00, and £13,000.00. The 'Rent (Offered)' column is highlighted with a red box. The 'Product' and 'Rent (Default)' columns are also visible.

| *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      |                       | <input type="button" value="▼"/> |
| 2 | Clippers - Unit 4-5 Waterman W... | £11,000.00     | 10000           | 1.00      |                       | <input type="button" value="▼"/> |
| 3 | Clippers - Unit 1 Zerega Way M50  | £12,000.00     | 10000           | 1.00      |                       | <input type="button" value="▼"/> |
| 4 | Clippers - Unit 2 Zerega Way M50  | £13,000.00     | 10000           | 1.00      |                       | <input type="button" value="▼"/> |

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.

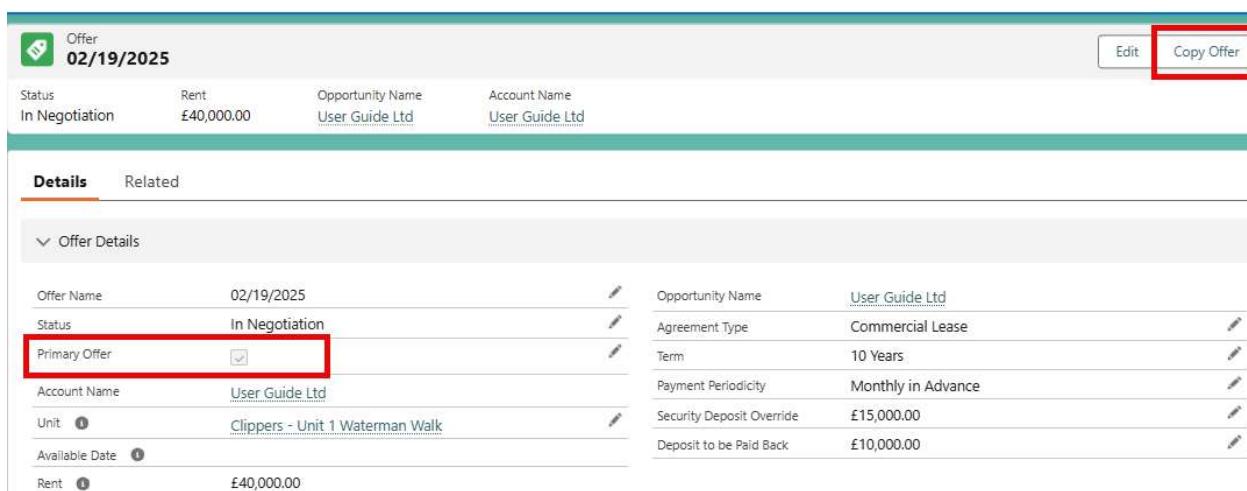
|  Offer History (6+) |                              |                   |                |              |
|--|------------------------------|-------------------|----------------|--------------|
| Date   | Field                        | User              | Original Value | New Value    |
| 2/19/2025, 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.



The screenshot shows the 'Offer Details' page for an offer made on 02/19/2025. The 'Copy Offer' button is highlighted with a red box. The 'Primary Offer' checkbox is also highlighted with a red box. Other fields shown include Status (In Negotiation), Rent (£40,000.00), Opportunity Name (User Guide Ltd), and Account Name (User Guide Ltd). The 'Offer Details' section lists various offer parameters like Offer Name, Status, Primary Offer, and Rent.

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**

|                          |                    |                                    |                                |
|--------------------------|--------------------|------------------------------------|--------------------------------|
| Status<br>In Negotiation | Rent<br>£40,000.00 | Opportunity Name<br>User Guide Ltd | Account Name<br>User Guide Ltd |
|--------------------------|--------------------|------------------------------------|--------------------------------|

**Details** Related

Offer Details

|                |                                     |                           |                    |
|----------------|-------------------------------------|---------------------------|--------------------|
| Offer Name     | 02/19/2025                          | Opportunity Name          | User Guide Ltd     |
| Status         | In Negotiation                      | Agreement Type            | Commercial Lease   |
| Primary Offer  | <input checked="" type="checkbox"/> | Term                      | 20 Years           |
| Account Name   | User Guide Ltd                      | Payment Periodicity       | Monthly in Advance |
| Unit           | Clippers - Unit 1 Waterman Walk     | Security Deposit Override | £25,000.00         |
| Available Date | 1                                   | Deposit to be Paid Back   | £10,000.00         |
| Rent           | £40,000.00                          |                           |                    |

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 negotiation process.

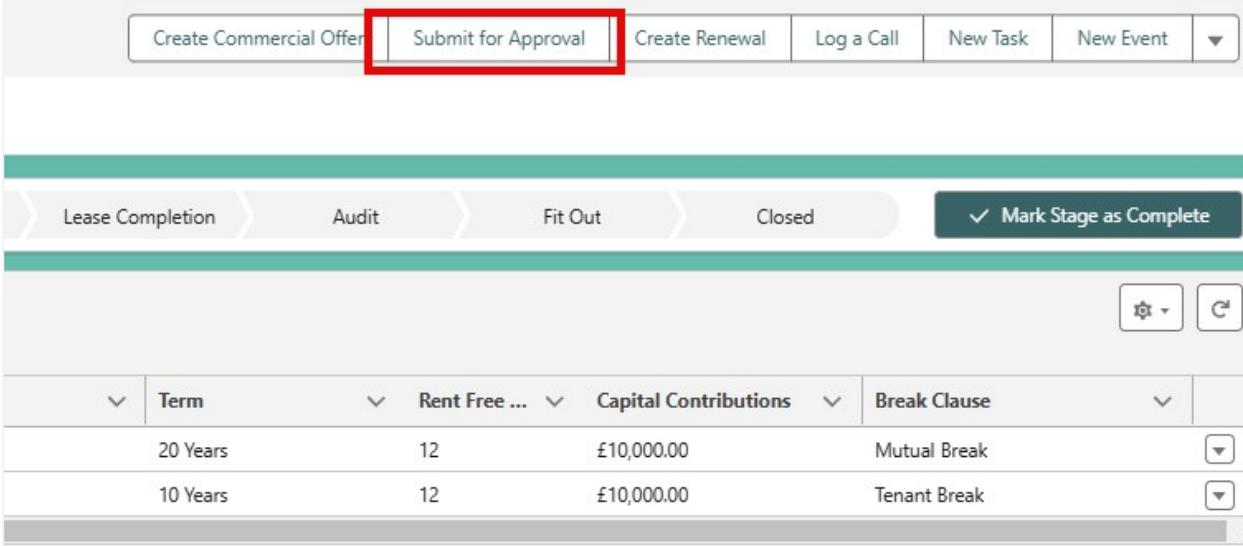
Opportunity  
**User Guide Ltd**

| Create Commercial Offer   | Submit for Approval       | Log a Call               | New Task                                | New Event                           |              |               |                       |               |              |      |               |                       |              |   |          |            |                |                          |            |          |    |            |              |   |          |            |                |                                     |            |          |    |            |              |
|---|---------------------------|--------------------------|---|-------------------------------------|--------------|---------------|-----------------------|---------------|--------------|------|---------------|-----------------------|--------------|---|----------|------------|----------------|--------------------------|------------|----------|----|------------|--------------|---|----------|------------|----------------|-------------------------------------|------------|----------|----|------------|--------------|
| Account Name<br>User Guide Ltd  | Move-In Date<br>3/12/2025 | Agreed Terms<br>20 Years | Unit<br>Clippers - Unit 1 Waterman Walk | Rent<br>£40,000.00                  |              |               |                       |               |              |      |               |                       |              |   |          |            |                |                          |            |          |    |            |              |   |          |            |                |                                     |            |          |    |            |              |
| Offer Negotia... AM Approval IC Approval Heads of Terms Legals AFL Lease Complete... Audit Fit Out Closed <input checked="" type="checkbox"/> Mark Stage as Complete  |                           |                          |   |                                     |              |               |                       |               |              |      |               |                       |              |   |          |            |                |                          |            |          |    |            |              |   |          |            |                |                                     |            |          |    |            |              |
| <b>Offers (2)</b><br>2 items • Updated 2 minutes ago  |                           |                          |   |                                     |              |               |                       |               |              |      |               |                       |              |   |          |            |                |                          |            |          |    |            |              |   |          |            |                |                                     |            |          |    |            |              |
| <table border="1"> <thead> <tr> <th>Offer Number</th> <th>Offer Name</th> <th>Status</th> <th>Primary Of...</th> <th>Rent</th> <th>Term</th> <th>Rent Free ...</th> <th>Capital Contributions</th> <th>Break Clause</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>00087469</td> <td>02/19/2025</td> <td>In Negotiation</td> <td><input type="checkbox"/></td> <td>£40,000.00</td> <td>10 Years</td> <td>12</td> <td>£10,000.00</td> <td>Tenant Break</td> </tr> <tr> <td>2</td> <td>00087470</td> <td>02/19/2025</td> <td>In Negotiation</td> <td><input checked="" type="checkbox"/></td> <td>£40,000.00</td> <td>20 Years</td> <td>12</td> <td>£10,000.00</td> <td>Mutual Break</td> </tr> </tbody> </table> <a href="#">View All</a> |                           |                          |   |                                     | 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 |
| 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 |      |               |                       |              |   |          |            |                |                          |            |          |    |            |              |   |          |            |                |                                     |            |          |    |            |              |

#### 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 for managing commercial offers. At the top, there is a navigation bar with buttons for 'Create Commercial Offer', 'Submit for Approval' (which is highlighted with a red box), 'Create Renewal', 'Log a Call', 'New Task', 'New Event', and a dropdown menu. Below the navigation bar, there is a progress bar with stages: 'Lease Completion', 'Audit', 'Fit Out', and 'Closed'. A button 'Mark Stage as Complete' is located next to the 'Closed' stage. The main content area displays a table with columns for 'Term', 'Rent Free ...', 'Capital Contributions', and 'Break Clause'. Two rows are visible: one for '20 Years' with a rent free period of 12 years and capital contributions of £10,000.00, and another for '10 Years' with the same details. Below this table, a modal dialog box is open with the title 'Submit for Approval'. The dialog contains a 'Comments' section with the text 'Please can you look through this offer?' and two buttons at the bottom: 'Cancel' and 'Submit'.

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

The screenshot shows the Qube Opportunity page for 'User Guide Ltd'. At the top, it displays basic details: Account Name (User Guide Ltd), Move-In Date (28/02/2025), Agreed Terms (20 Years), Unit (Clippers - Unit 1 Waterman Walk), and Rent (£0.00). Below this, a horizontal navigation bar shows steps: AM Approval (highlighted with a red box), IC Approval, Heads of Terms, Legals, AFL, Lease Completion, and Audit. Under 'AM Approval', there is a section titled 'Offers (1)' with one item listed. At the bottom, tabs include Details, Files, Stepped Rent, and Related (which is selected). In the 'Related' tab, there is a sub-section titled 'Approval History (2)' containing two entries:

| 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       |

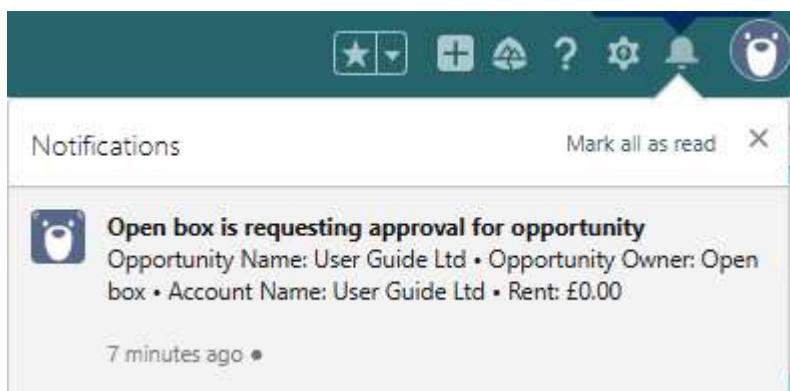
The Approval will be sent to the User that is listed as the Asset Manager on the Unit. If this field is empty, an approval will not be able to be raised. This field is one that is mastered in Qube, so any changes of Asset Managers should be completed there.

The screenshot shows the Qube Unit page for 'Clippers - Unit 1 Waterman Walk'. At the top, it displays basic details: Building (Clippers Commercial, Waterman Wk, Salford M50), Block (Clippers - Commercial), Unit Status (Studio), Bedrooms (1), and Bathrooms (1). Below this, there are tabs: Unit Details, Lettings And Marketing, Property Management (selected), Tenants Contact Details, and More. In the 'Property Management' tab, there is a section titled 'Management Details' with the following fields:

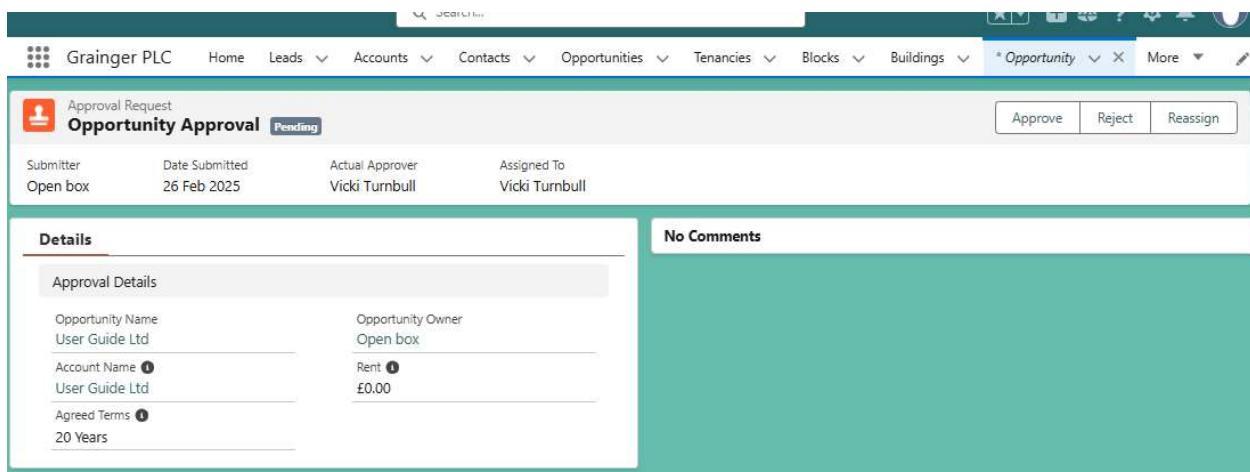
|                  |                                    |                     |                                     |
|------------------|------------------------------------|---------------------|-------------------------------------|
| Unit Manager     | Tom Crosthwaite                    | Asset Manager       | 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.

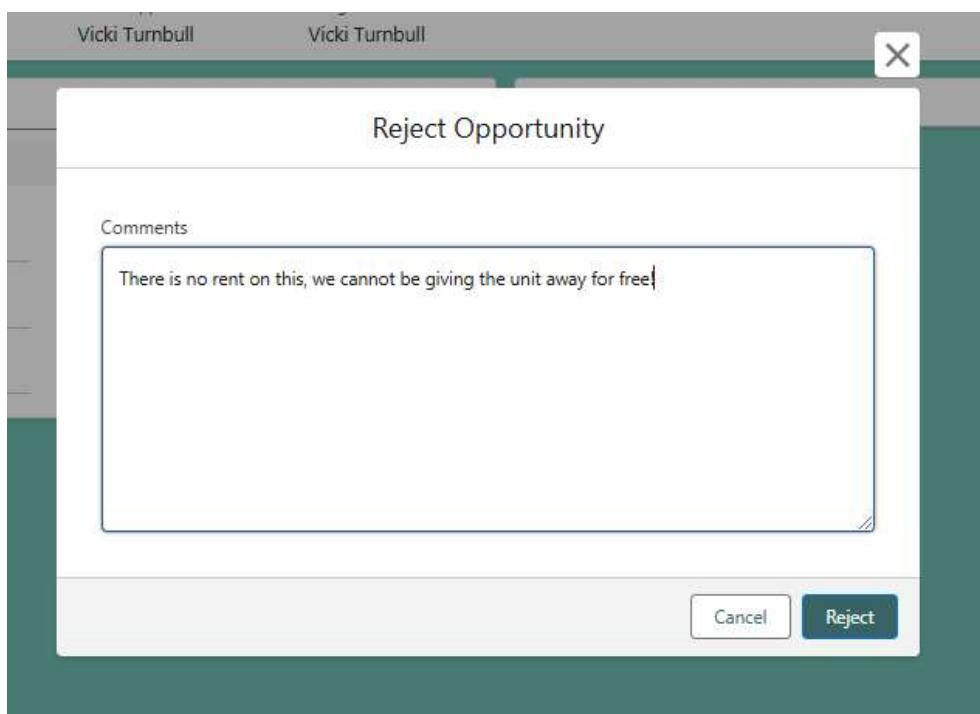
The screenshot shows the Qube navigation bar. It includes icons for star, plus, question mark, gear, and a bell with a red box around it, indicating a notification. Below the icons are dropdown menus for Units, Tasks, Notes, Reports, and More.



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.

This screenshot shows the 'Opportunity Approval' step in the 'Process Instance Step' section. The status is 'Rejected'. The 'Details' tab is selected, showing approval details for an opportunity named 'User Guide Ltd' with an account name 'User Guide Ltd'. The 'Agreed Terms' are '20 Years'. On the right, under 'Approvers Comments', Vicki Turnbull has left a comment: 'There is no rent on this, we cannot be giving the unit away for free!' dated 26 Feb 2025, 13:39:22.

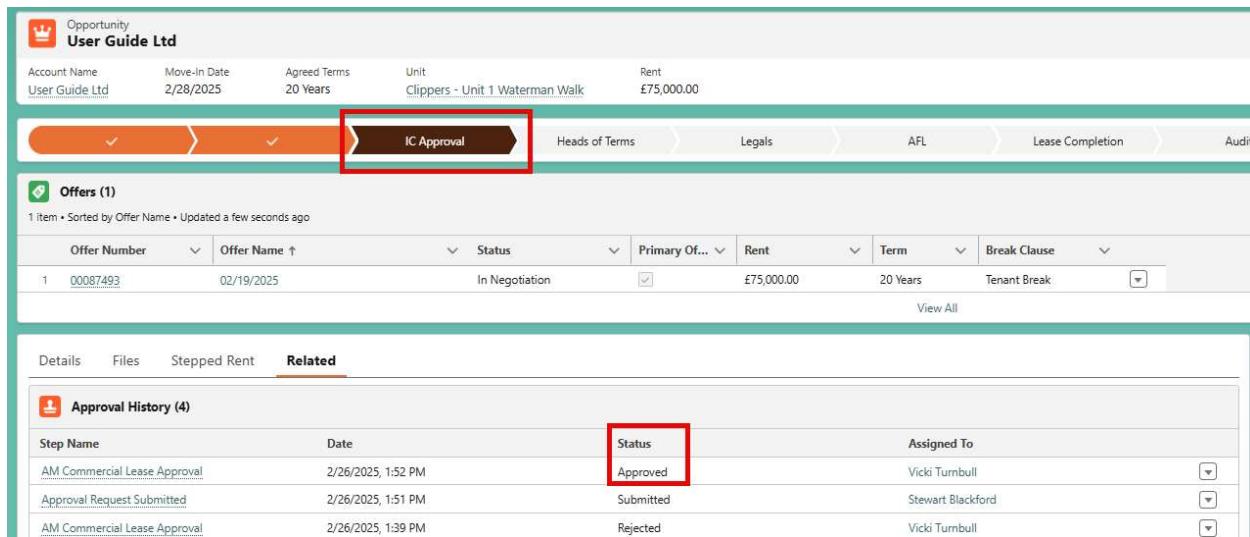
The Stage also moves back to *In Negotiation*, so that the Commercial Leasing Team can either make a new offer or close the opportunity if there is no further chance of improvements.

This screenshot shows the main 'Opportunity' page for 'User Guide Ltd'. The stage is 'Offer Negotiation', highlighted with a red box. Below the stage, there is a table titled 'Offers (1)' showing one offer with details like Offer Number, Offer Name, Status, Rent, Term, and Break Clause. At the bottom, the 'Related' tab is selected, showing the 'Approval History (2)' table. One entry in this table, 'AM Commercial Lease Approval', has a status of 'Rejected' and is assigned to Vicki Turnbull, with a date of 2/26/2025, 1:39 PM. Another entry, 'Approval Request Submitted', is assigned to Open box and has a date of 2/26/2025, 1:22 PM.

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.

This screenshot shows the 'Opportunity Approval' step in the 'Process Instance Step' section. The status is 'Approved'. The 'Details' tab is selected, showing approval details for an opportunity named 'User Guide Ltd' with an account name 'User Guide Ltd'. The 'Agreed Terms' are '20 Years'. On the right, under 'Approvers Comments', Vicki Turnbull has left a comment: 'Much better, happy with this!' dated 26 Feb 2025, 13:52:44.

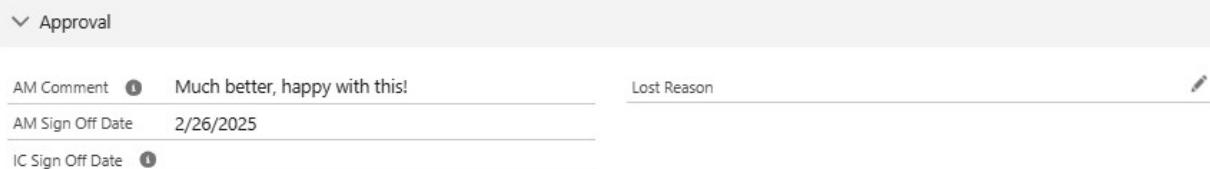
Again the related list on the Opportunity will reflect this approval and the stage will move on to **IC Approval** stage automatically.



The screenshot shows the Opportunity details for 'User Guide Ltd'. The 'IC Approval' stage is highlighted with a red box. Below it, the 'Offers (1)' section shows one offer in negotiation. The 'Related' tab is selected, showing the 'Approval History' table. One row in the table is highlighted with a red box, indicating the status 'Approved'.

| 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.



The screenshot shows the 'Approval' section of the opportunity. It includes fields for 'AM Comment' (containing 'Much better, happy with this!'), 'AM Sign Off Date' (set to 2/26/2025), and 'IC Sign Off Date' (with a note '①').

## 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

The screenshot shows a user interface for creating a new comment. At the top, there are three tabs: 'Activity', 'New Comment' (which is selected and highlighted in orange), and 'Chatter'. Below the tabs are three input fields with validation asterisks: '\*Type' (dropdown menu showing '--None--'), '\*Comments' (text area), and '\*Date' (date picker showing '26 Feb 2025'). A 'Save' button is located at the bottom right of the form area.

This screenshot shows the same 'New Comment' form, but the dropdown menu for the 'Type' field is open, displaying a list of options. The option '--None--' is currently selected and highlighted in blue. Other visible options in the list include: General Comment, Landlord Lawyer Delay, Renegotiation, Technical Delay, Tenant Delay, and Tenant Lawyer Delay. The 'Save' button is visible at the bottom right of the form area.

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.

Activity    New Comment    Chatter

Filters: All time • All activities • All types    

Refresh • Expand All • View All

▼ Upcoming & Overdue

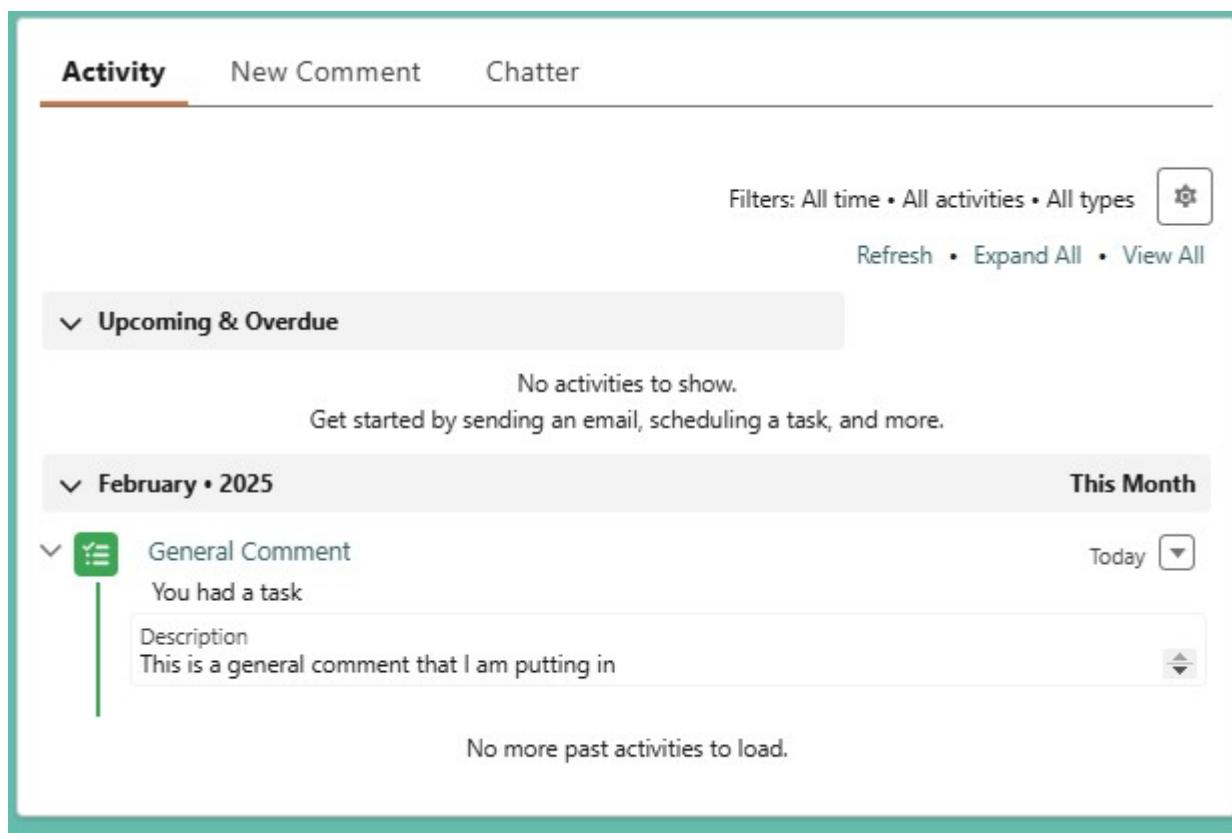
No activities to show.  
Get started by sending an email, scheduling a task, and more.

▼ February • 2025    This Month

Today 

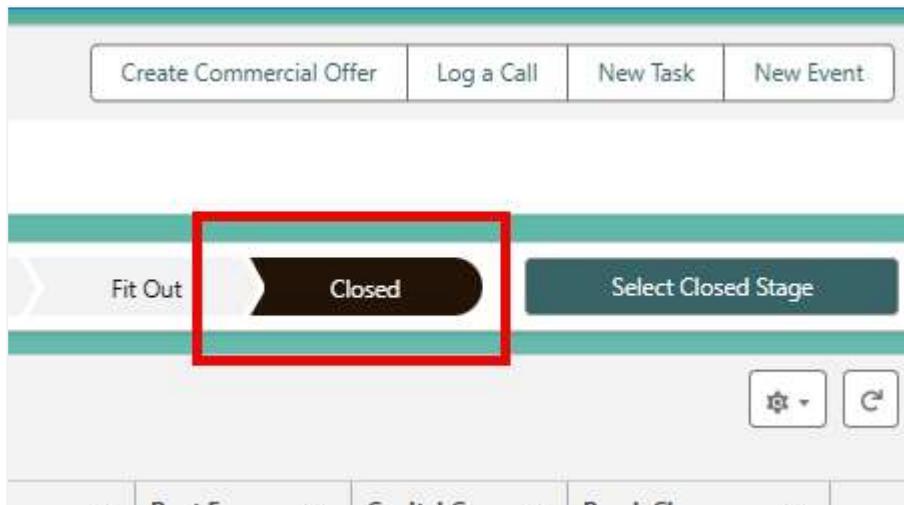
▼  General Comment  
You had a task  
Description  
This is a general comment that I am putting in

No more past activities to load.



## 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.

A screenshot of a modal dialog box titled 'Edit Dependencies'. The dialog contains three dropdown menus: '\*Stage' set to 'Closed Lost', 'Lost Reason' set to '--None--', and 'Sub Stage' set to '--None--'. At the bottom of the dialog are two buttons: 'Cancel' and 'Done'. Below the dialog, at the bottom of the main screen, there are two status indicators: 'Agreement type' showing 'COMMERCIAL LEASE' and 'Status' showing 'iv'.

Edit Dependencies

\* Stage  
Closed Lost

Lost Reason  
--None--  
✓ --None--  
Unsuitable Usage  
Required Additional Cap Con

Agreement type: COMMERCIAL LEASE

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.

The screenshot shows a software application window with a header 'Legals'. Below the header, there are several input fields and a checkbox. The checkbox is labeled 'Deposit Paid / Create Future Tenancy' and has a checked status. This checkbox is highlighted with a red rectangular border. To the left of the checkbox, there is a small circular icon with a question mark inside. The other input fields visible include 'Legals Instructed Date', 'Draft Lease Received', 'Estimated Completion Date', 'Completed Lease Received', 'Tenancy Signing Date Grainger', and 'Tenancy Signing Date Tenant(s)'. Each input field has a small edit icon (pencil) to its right.