

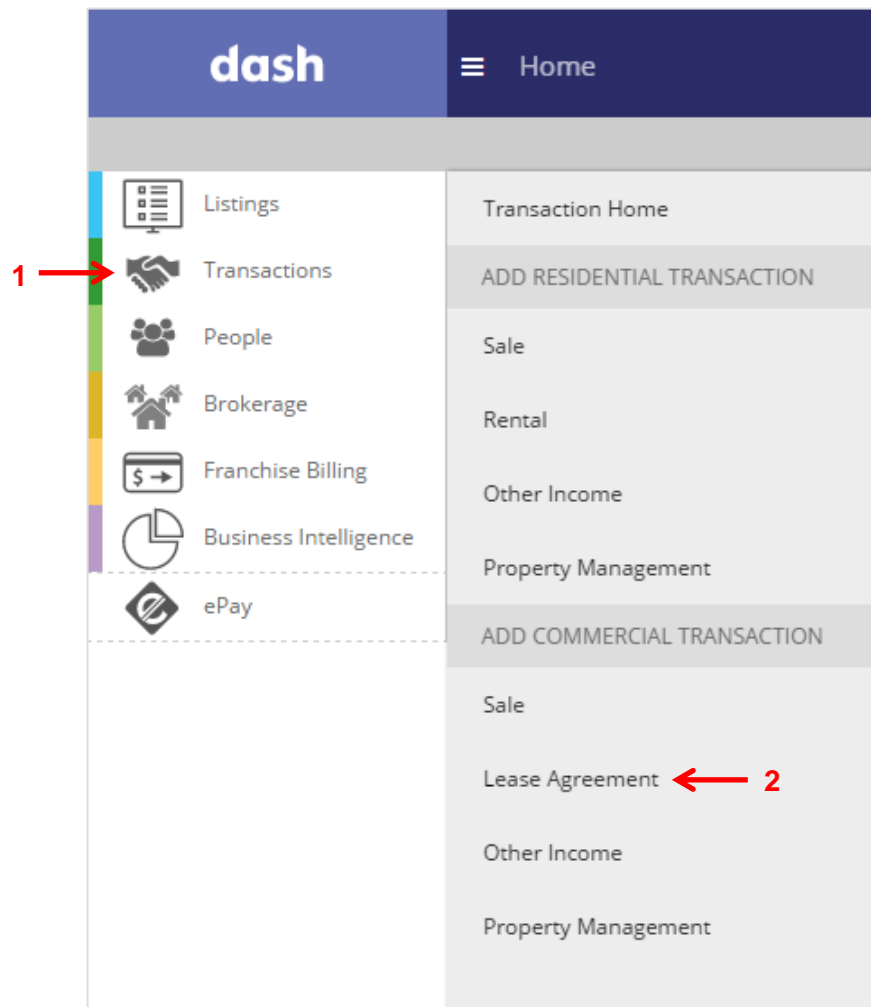
Add a Step Lease Agreement to an Active Listing

Follow the steps in this guide to add a step lease agreement to a Commercial Lease Listing in dash. You will need to manually update the listing to reduce available space, etc. If you want the listing removed from displaying online, you must update the listing to no longer show on the internet.

Depending on the commercial lease property, you may have multiple lease agreements on a single lease listing, which means the listing remains active after you've added a step lease agreement to it.

Fields marked with an asterisk (*) are mandatory.

1. Click **Transactions** on the left navigation menu.
2. Click **Lease Agreement** under Add Commercial Transaction.



The **Add Commercial Lease Agreement** window displays with option for selecting Lease Agreement Type.

- 3. Click the **Step Lease** radio button for Agreement Type
- 4. Select **Already Exists in dash.**
(this is selected when you have the listing already stored in dash and are adding an agreement to it)
- 5. Select **Yes**, if you are also representing the tenant.

- 6. Enter search criteria (e.g. MLS ID or Address for the listing) in **Search** field.
- 7. Next click on the listing from the search result.

The **Add Commercial Lease Agreement** window displays. Some of the listing information will be prefilled based on the information previously entered for the listing.

- 8. Navigate to any tab by clicking the tabs at the top of the screen.

Enter the information in the fields for each tab. You will be prompted if there is missing information required on a tab.

Listing & Terms Tab:

9. Enter the **Agreement Terms**. The information required will vary depending whether you are representing the tenant or not.

Note: Any concession amount entered will not reduce the Adjusted Gross Commission

Agreement Date: When agreement was signed.

Agreement Commencement Date: When the first step begins

Agreement Expiration: Date of the Last Step

The screenshot shows the 'Listing & Terms' tab with two main sections: 'LISTING SIDE' and 'AGREEMENT TERMS'. The 'LISTING SIDE' section includes fields for Listing Office, Date Listed, Country, Address Line 1, Address Line 2, City, State/Province, and ZIP/Postal Code. The 'AGREEMENT TERMS' section includes Agreement Office, Right to Renew, and Sub-Lease. A red box highlights the 'TERMS' section, which contains fields for Concession Amount, Agreement Date, Commencement Date, and Expiration Date. A red '9' is placed above the Concession Amount field.

10. Enter the **Sales Associate** information for both sides, if this was not previously entered.

11. Click on **Gross Rent and Commission**

The screenshot shows a table for 'SALES ASSOCIATES' with columns for Name, % OF SIDE, and PRIMARY. The first row contains '00067 - MARK TERZIAN', '100', and a primary indicator. A red box highlights the table, and a red '10' is placed above the name field. Below the table, a 'Cancel' button is on the left, and a red '11' with an arrow points to a blue 'Gross Rent & Commission' button on the right.

Gross Rent and Commission Tab:

- 12. Enter **Lease Area**
- 13. The **Step Start Date** is the agreement commencement date and will populate based on the start date entered in the Listing and Terms Tab.

Note: Any changes to Step Start Date must be done in the Listings & Terms tab.

- 14. Enter **Terms (Months)**

The **Step End Date** and **Gross Commission** and **Gross Rent** data will be auto-calculated.

Totals will also be auto-calculated.

GROSS RENT CALCULATION

Override automatic calculation
Check if you don't want dash to adjust the rate when you change the gross rent, or vice versa

LEASE AREA * Sq. Ft. CURRENCY *

LEASE STEP 1

STEP START DATE STEP END DATE RATE * per sqft. / Month TERMS(MONTHS) * GROSS RENT *
(Lease Area * Rate * Term)

TOTAL GROSS COMMISSION % OF GROSS RENT GROSS COMMISSION (LISTING SIDE) * % OF SIDE GROSS COMMISSION (AGREEMENT SIDE) * % OF SIDE

Totals

GROSS RENT	TOTAL GROSS COMMISSION	GROSS COMMISSION (LISTING SIDE)	GROSS COMMISSION (AGREEMENT SIDE)
<input type="text" value="120,000.00"/>	<input type="text" value="3,600.00"/>	<input type="text" value="1,800.00"/>	<input type="text" value="1,800.00"/>

Cancel Commission & Deductions >>

Add more Steps by clicking the + button, if entering multiple step lease

LEASE STEP 1

STEP START DATE STEP END DATE RATE * per sqft. / Month TERMS(MONTHS) * GROSS RENT *
(Lease Area * Rate * Term)

TOTAL GROSS COMMISSION % OF GROSS RENT GROSS COMMISSION (LISTING SIDE) * % OF SIDE GROSS COMMISSION (AGREEMENT SIDE) * % OF SIDE

Once all Step leases have been added, the Gross Rent and Commissions page will appear with all Lease Steps Agreements associated with the listing.

ADD A COMMERCIAL LEASE AGREEMENT : Scranton Carbondale Hwy., Dickson City, Pennsylvania, 18519
Listing ID : WJM945 | MLS ID: 17-1016

Listing & Terms | **Gross Rent & Commission** | Commission & Deductions | Landlord | Tenant | Payments | Review

GROSS RENT CALCULATION

Override Automatic Calculation
Check if you don't want dash to adjust the Rate when you change the Gross Rent, or vice versa

LEASE AREA: 1,000 Sq. Ft. CURRENCY: USD

LEASE STEP	STEP START DATE	STEP END DATE	RATE	TERMS(MONTHS)	GROSS RENT (Lease Area * Rate * Term)
LEASE STEP 1	05/06/2017	05/05/2018	10 per sqft. /	12	120,000
TOTAL GROSS COMMISSION	3,600.00	% OF GROSS RENT: 3	GROSS COMMISSION (LISTING SIDE): 1,800.00	% OF SIDE: 1.50	GROSS COMMISSION (AGREEMENT SIDE): 1,800.00
LEASE STEP 2	05/06/2018	05/05/2019	12 per sqft. /	12	144,000
TOTAL GROSS COMMISSION	4,320.00	% OF GROSS RENT: 3	GROSS COMMISSION (LISTING SIDE): 2,160.00	% OF SIDE: 1.50	GROSS COMMISSION (AGREEMENT SIDE): 2,160.00
LEASE STEP 3	05/06/2019	05/05/2020	14 per sqft. /	12	168,000
TOTAL GROSS COMMISSION	5,040.00	% OF GROSS RENT: 3	GROSS COMMISSION (LISTING SIDE): 2,520.00	% OF SIDE: 1.50	GROSS COMMISSION (AGREEMENT SIDE): 2,520.00
LEASE STEP 4	05/06/2020	05/05/2021	16 per sqft. /	12	192,000
TOTAL GROSS COMMISSION	5,760.00	% OF GROSS RENT: 3	GROSS COMMISSION (LISTING SIDE): 2,880.00	% OF SIDE: 1.50	GROSS COMMISSION (AGREEMENT SIDE): 2,880.00

Totals for **Gross Rent**, and **Total Gross Commission** and splits for **Listing Side** and **Agreement Side** are calculated and shown for all lease steps.

Totals	GROSS RENT	TOTAL GROSS COMMISSION	GROSS COMMISSION LISTING SIDE	GROSS COMMISSION AGREEMENT SIDE
	840,000.00	25,200.00	12,600.00	12,600.00

Commissions and Deductions Tab:

- 15. Enter the **Referral Information**, if applicable.
- 16. Enter any **Sales Associates Commissions**
- 17. Enter any **Deductions** that would impact the total company dollar, if applicable.

Note: Commissions and deductions will not affect calculation of AGC.

- 18. Click **Landlord** to move on.

Listing & Terms | Gross Rent & Commission | **Commission & Deductions** | Landlord | Tenant | Payments | Review

ADJUSTED GROSS COMMISSION

TRANSACTION	LISTING SIDE	AGREEMENT SIDE
TOTAL GROSS COMMISSION	\$3,600.00	\$1,800.00
REFERRALS	0 Referrals	
REPORTED REFERRALS	\$0.00	\$0.00
ADJUSTED GROSS COMMISSION	\$3,600.00	\$1,800.00

Adjusted Gross Commission(AGC)= Gross Commission - Reported Referrals

DEDUCTIONS

SA COMMISSION	TRANSACTION (\$)	LISTING SIDE (\$)	AGREEMENT SIDE (\$)

DEDUCTIONS	TYPE	DEDUCTION	SIDE	AMOUNT
0	Off the bottom	500	Agreement	500

Cancel 18 → Landlord >>

Landlord Tab:

- 19. Enter the Landlord details on the **Landlord** tab.
- 20. If the landlord is a contact that already exists in dash, click **Select from existing contacts** to locate the individual.
- 21. Click **Tenant**, to move on.

The screenshot shows a multi-step form for adding a landlord. The 'Landlord' tab is active. The form includes sections for 'LANDLORD SOURCE', 'LANDLORD LEAD', 'LANDLORD DETAILS', 'ADDRESS', and 'OTHER DETAILS'. Annotations are as follows: '19' points to the 'TYPE*' dropdown menu; '20' points to the 'Select from existing contacts' button; '21' points to the 'Tenant >>' button at the bottom right. The 'LANDLORD DETAILS' section shows 'Corporation' selected for 'TYPE*', 'Addison LLC' for 'ENTITY NAME*', and a greyed-out 'FIRST NAME' field. The 'ADDRESS' section is filled with 'United States', '55 Madison Ave', 'New York', 'New York', and '12345'. The 'OTHER DETAILS' section has empty fields for 'PHONE NUMBER', 'EMAIL', and 'WEBSITE'. A 'Cancel' button is on the bottom left, and an 'Add Another Tenant' button is below the 'OTHER DETAILS' section.

Tenant Tab:

- 22. Enter the Tenant details on the **Tenant** tab.
- 23. If the tenant is a contact that already exists in dash, click **Select from existing contacts** to locate the individual.
- 24. Click **Payments** to move on.

Payment Tab:

- 25. For each Lease Step, select if you want to record payments using an auto generated payment schedule, or if you'd like to record ad hoc payments.
- In this example, we will select **Use a payment schedule**. If you choose not to set up a schedule (i.e. Ad Hoc payments), then payments will be entered as they are received.

26. Enter the **Number of Payments** and **Frequency** of the payments,

Note: The **Start Schedule On** date is the step start date and will auto-populate. To change this date, update Agreement Commencement Date

27. Click **Generate**.

The schedule displays, including the information you entered.

28. Record the payment received, including **Date Received**, **Amount Received** and **Check Number**.

Sq.#	DUE DATE	AMOUNT SCHEDULED	DATE RECEIVED	AMOUNT RECEIVED	CHECK NUMBER
1	08/1	500.00			
2	09/1	500.00			
3	10/1	500.00			

29. Click **Review** to move on.


Cancel 29 → Review

Review Tab:

The Review tab allows you to review the information entered prior to saving the agreement.

30. Edit any section by clicking the pencil.

Listing & Terms ✓ Commission & Deductions ✓ Landlord ✓ Tenant ✓ Payments ✓ Review

Listing & Terms 30 

LISTING SIDE		AGREEMENT TERMS	
LISTING OFFICE 0001 - 751 North Main St, Meadville	LIST DATE Jun 30, 2016	AGREEMENT SIDE OFFICE 0001 - 751 North Main St, Meadville	
COUNTRY United States	ADDRESS LINE 1 4897 Main St	RIGHT TO RENEW Yes	SUB-LEASE No
ADDRESS LINE 2	CITY Allentown	CONCESSION AMOUNT \$0.00	AGREEMENT DATE Jul 1, 2016
STATE/ PROVINCE Pennsylvania	ZIP/POSTAL CODE 15789	COMMENCEMENT DATE Aug 1, 2016	EXPIRATION DATE Aug 1, 2018

31. Click **Finish** to save the information.

PAYMENTS OUTSTANDING

DUE DATE	AMOUNT SCHEDULED	DATE RECEIVED	AMOUNT RECEIVED	CHECK NUMBER
Aug 1, 2016	\$500.00			
Sep 1, 2016	\$500.00			
Oct 1, 2016	\$500.00			
Nov 1, 2016	\$500.00			
Dec 1, 2016	\$500.00			
Jan 1, 2017	\$500.00			
Feb 1, 2017	\$500.00			
Mar 1, 2017	\$500.00			
Apr 1, 2017	\$500.00			
May 1, 2017	\$500.00			
Jun 1, 2017	\$500.00			
Jul 1, 2017	\$500.00			

Cancel 31 → FINISH

A confirmation displays, letting you know that the agreement has been successfully saved. The agreement will also be assigned a unique ID number.

32. In the **More Actions** section, click on the **Lease Listing ID** to make any updates. You can also print the agreement, add another commercial lease agreement, add property mgmt. contract to the agreement, return to the Transactions home page or view this Transaction.

ADD A COMMERCIAL LEASE AGREEMENT

✓ **Agreement has been saved**
31 Main Street, Parsippany, New Jersey, 07940, United States (AGREEMENT ID: EDB45T-A1415)

MORE ACTIONS

- Print Agreement
- Add Another Commercial Lease Agreement
- Add Property Management Contract to this Agreement
- You may want to access the lease listing ID EDB45T and update following fields**
 - Available Space (i.e reduce available space)
 - Listing Status (Available to Unavailable)
- Go to Transactions Home Page
- View this Transaction