3

Properties

All data pertaining to properties is handled by the property section of PRIMO. A property record is comprised of five or six pages:

- Address page: Address section (address, remarks and record information) and Contact section.
- Data page: Property Details section (surface, rent and sale price, location, etc.) and Matching section (lists requirements matching property criteria).
- Virtual Fields page: if your Program Administrator has added virtual fields to property records, an additional page is inserted into the record to accommodate them (cf. section entitled “Virtual Fields“, Chapter 15, “Administration“, page 15-6).
- Contracts page: contracts and lease terms.
- Documents page: Fact Sheets 1 and 2, offer-text, newspaper advertisement, window display, update explanation and tenant information.
- Activities page: phone calls, review dates, to-dos, histories, memos, meetings, and any word processor or OLE documents linked to an activity.

If virtual fields have been added to property records, each property record is automatically re-numbered to accommodate the additional page.

Furthermore, the property record toolbar contains an extra icon (), the "offer" icon. For more information on how to create an offer, see Chapter 10, “Offers“.

Besides the standard Search and List search window, property records can be searched using the additional preset Search and List windows located in the Data menu Preset Search sub-menu. These preset Search and List windows are entitled:

- Property-Regions: see section entitled “Property-Regions Find and List Window“, Chapter 6, “Lists“, page 6-21,
- Property-Activities: see section entitled “Property-Activities Find and List Window“, Chapter 6, “Lists“, page 6-22.

Creating Property Records

There are two ways of creating a new property record:

- *Example A:* from within an Organisation record
- *Example B:* from the PRIMO Desktop

Example A:

If you wish to add a property record that belongs to an organisation record (such as the property owner's record), and the organisation record does not yet exist, you must first create one (cf. section entitled “Creating an Organisation Record“, Chapter 2, “Organisations & Contacts“, page 2-2).

1. Once you are in the organisation record, go to the property page of that record.

   Click on the plus icon located to the above right of the list.
2. A blank property record will open.
3. The first contact listed in the Contact section of the organisation record will automatically be listed in the Contact list of the property record you have just created.

   To add other contacts to the Contact section of the property record see section entitled “Contact Section“ in this chapter, page 3-7.

Example B:

If you wish to first create a property record and then link it to one or more organisations that already exist, proceed as follows:

1. Open the Data menu, and select "Property" from the New sub-menu.

   A blank property record will open:

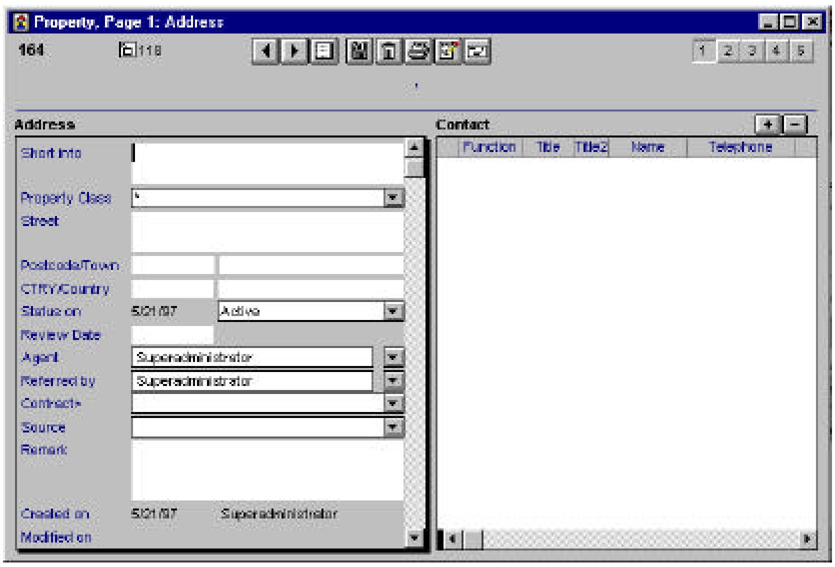

Fig. 3-1: Blank Property Record

Add a contact link as follows:

2. Click on the plus icon located above the contact section.

   The following dialogue box will open:

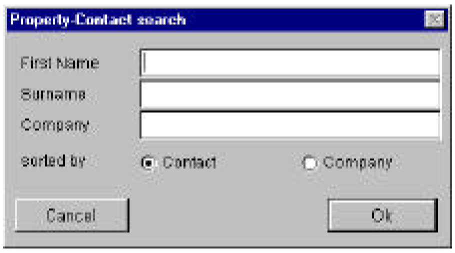

Fig. 3-2: Dialogue Box: “Property Contact Search”

3. Enter the contact’s first name, surname or organisation name and click on “OK” (you may use joker symbols if you do not know the complete name).
4. If there are several contacts with the same name, or if you searched only for the organisation name and there are several contacts associated with that organisation, you will be given a list of contacts to choose from.
5. If your search fits only one contact, the contact will automatically be entered in the Contact list of the property record. If your search opened a list of possible contacts, select one and click on “OK”. The contact you have selected will be entered in the Contact section of the property record.

➔ **Tip:**
You cannot add a contact to an organisation from the property record. All contacts added to a property record must already exist. Contacts can only be added to PRIMO from within organisation records (cf. section entitled “Creating, Deleting and Editing Contacts“, Chapter 2, “Organisations & Contacts“, page 2-10).

The contact is the means by which property and organisation records are linked.

A property record can be saved without being linked to a contact. However, we advise that all properties be linked to a contact. A property record can be linked to several types of contacts (e.g. owner, architect, manager, tenant, landlord), and therefore, several organisations.

In contrast, a requirement record cannot be saved without first being linked to a contact, and all contacts must belong to the same organisation.

Property: Address page

The Address page is divided into three sections:

- Record header,

- Address section with property address and record information,
- Contact section with list of contacts linked to the property record.

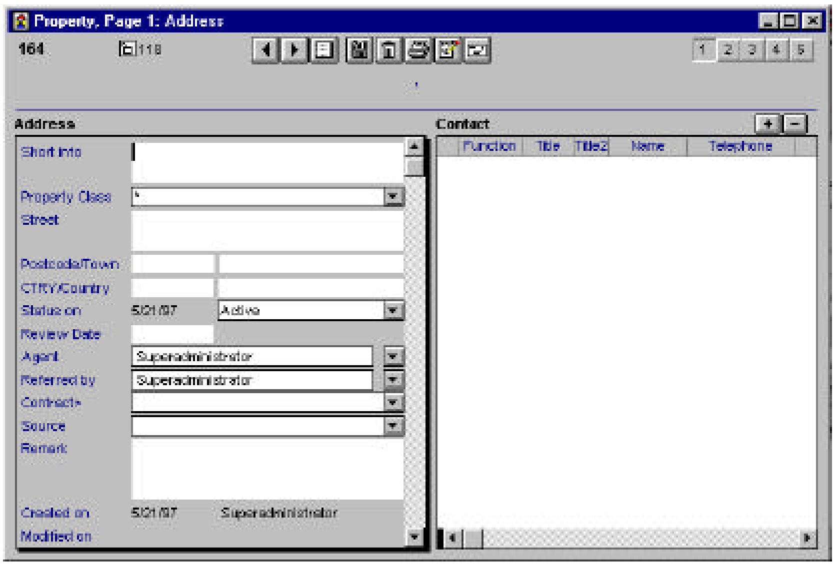

Fig. 3-3: Property: Address Page

Record Header

The property record header contains the standard record toolbar to which has been added an "offer" icon ( ). The record title bar, located below the toolbar, contains the property address as well as the name and number of the first contact you have linked to the property.

The record header appears at the top of each property record page.

Address Section

Below the record header, to the left, is the Address section of the Property: Address page. This section contains space for the property address and remarks about the property. The Contact section of the Property: Address page is located to the right of the address section.

The Address section also contains space for standard record information such as, "Status" and "Agent". These fields are automatically filled in when you create a new property record. However, they can be modified by you if your Administrator has given you authority to do so.

➔ **Tip:**
PRIMO only takes into consideration property records with the status "active" when matching properties to requirements (cf. section entitled "Matching", Chapter 4, "Requirements", page 4-19).

⚠ **Important:**
Before changing a record status, you should consider the alternative as described in section entitled “Record Status“ in this chapter, page 1-36. Specifically, you should review the section entitled “Changing Record Status Instead of Deleting“ in this chapter, page 1-38.

You should change a property status to "Archived" if the property has been leased or sold, and change a property's status to "Inactive" if the property has no available surface. Delete records sparingly. For example, you should only delete a record if it is a duplicate. In that case, before deleting a duplicate record, copy any important information from the record you are deleting to the record you are keeping.

Entering Data in the Address Section

Short Info: Type a short description of up to 80 characters. A short description can include the property name (e.g. Jackson House), or the type of property (e.g. Exclusive Retail Space).

Property Class: Select a property class from the Administrator-defined list.

The "property class" list can contain broad property classifications such as, industrial site, office building or country residence. These classifications are not meant to perfectly describe a property, but instead are used more as search criteria to help you look for a certain type of property (e.g. industrial sites vs. office buildings).

Street: Enter the property’s street address, including street number.

Postcode/Town, CTRY/Country: As with the organisation record, PRIMO assists you in filling in these fields.

Contract: Choose a contract type as follows

- Standard
- Exclusive
- Joint Venture
- Contract Expected
- None

➔ **Tip:**
The contract type "None" serves a particular purpose: a property with an "Active" status and the contract type "None" can be matched to a requirement, however, when you try to offer the property a warning message informs you that there is no contract for this property (cf. section entitled “Requirement Suitability“ in this chapter, page 3-21 as well as section entitled “Property Suitability“, Chapter 4, “Requirements“, page 4-24).

Source: Select the source from which you learned about the property.

Remark: Write down any additional remarks pertaining to the property (e.g. lease terms, commission agreements, visit dates, etc.) You can write up to 2000 characters.

Contact Section

If you created a property from within an organisation record, then the first contact associated with that organisation will automatically be linked to the property record you just created.

The list containing contacts linked to a property will show you important information about each contact. Contact information cannot be modified from within the property record.

Double-clicking on contact in the Contact section of the Property: Address page will open the organisation record linked to the property record.

To add a contact to a property record, proceed as follows:

1. Click on the plus icon above the Contact section.
2. Enter appropriate search criteria (first name, surname, organisation name) into the search dialogue box.

Fig. 3-4: Search Dialogue Box: “Property-Contact Search”

3. Confirm your entry by clicking on “OK”.
4. If the search criteria you entered apply to several contacts, you will be given a list of contacts to choose from. Select the contact you need from the list and click on "OK".

   The selection dialogue box will close and the contact you have chosen will appear in the Contact section of the property record.
5. The contact you have added should be assigned a function based on his/her relationship to the property (e.g. owner, developer, architect, tenant). The Function column of the Contact section gives a choice of the following functions:

Fig. 3-5: “Function” Drop Down List

6. Select a function that best suits the contact you have added to the property record.

The function you have selected will appear in the Function column of the Contact section.

7. You can decide whether a contact should be a mail recipient by checking or unchecking (with the mouse or the space bar) the "Mail Recipient" check-box located next to a contact listed in the Contact section of the Address page. (A contact can be the mail recipient for an organisation without being the mail recipient for a property, and vice-versa.)

   The first contact you add to a property record will be chosen as the default mail recipient.

➔ **Tip:**
Only the "Mail Recipient" and "Function" fields of the Contact section can be modified within the property record. All other modifications pertaining to a contact must be made by opening the organisation record the contact belongs to. To do this select a contact from the Contact section and double-click on it or press F2 to open the organisation record.

To remove a contact from the Contact section of the property record, select it and click on the minus icon located above the Contact section. Removing a contact from the property record does not delete the contact from the PRIMO database. It simply removes a link that you created between an organisation record and a property record. To erase a contact from the database you must do this from within the organisation record. However, contacts cannot be deleted from the organisation record if they are linked to any properties or requirements.

Property: Data page

The Data page is divided into three sections:

- Record Header,
- Property Details section with Department fields, Data box, Type/Area box and Attributes box,
- Matching section with search criteria match list.

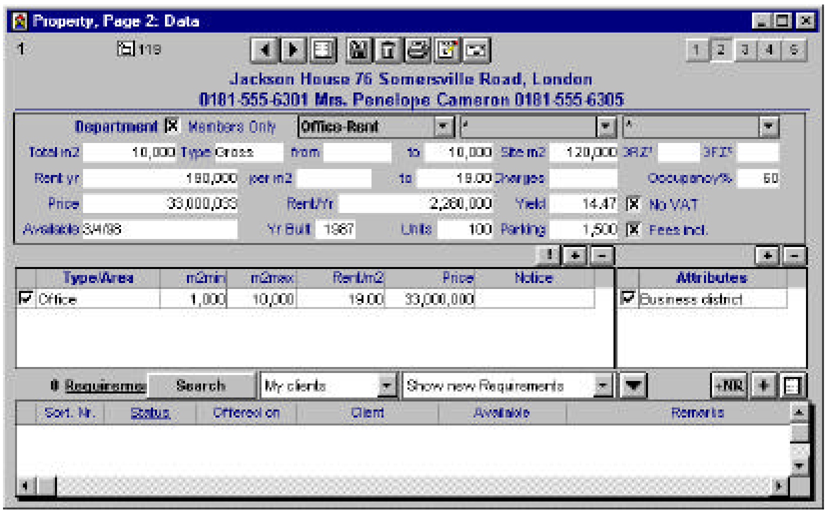

Fig. 3-6: Property: Data page

Property: Data page Overview

Record Header: The record header has already been discussed above.

Property Details Section - Department Fields: If your Program Administrator has divided PRIMO users into departments (cf. section entitled “User Rights“, Chapter 15, “Administration“, page 15-25), then at the time you create a property record, your department will automatically be listed in the first of three “Department” fields located in the Property Details section of the Property: Data page. The additional two fields allow you, the user, to enable other departments to view the record.

Property Details Section - Data, Type/Area and Attributes Boxes: The fields located below the "Department" fields contain data about the property (surface, price, parking, charges, yield, occupancy, etc.) Some of the numeric fields can be auto-calculated by PRIMO if you have entered appropriate data in the numeric fields of the Type/Area box.

The Type/Area and Attributes boxes let you add criteria that further describe the property. When matching properties to requirements, PRIMO combines information found on the Address page and the Property Details section of the Data page.

Matching Section: All requirements that match the property in question are then listed in the Matching section of the Data page.

Entering Data in the Property Details Section

Property Details Section: Department Fields

Whereas it is the Program Administrator who divides PRIMO users into departments (cf. section entitled “User Rights“, Chapter 15, “Administration“, page 15-25), it is up to users within a department to decide whether a property record can be viewed by all departments or only their own. If you do not want other departments to view a record you have created, you must activate the "Members Only" check-box located next to the three department fields. Activating the "Members Only" option will make the property record invisible to all users from other departments. They will not be able to search for the record, match it to requirements, or see it listed on the property page of an organisation record. (The only exception is when the property is linked to an activity. The property link will be visible, but the record will not be accessible.)

The "Members Only" option can only be activated if the first department field is filled in, and the other department fields are left blank. The selected department cannot be changed while the "Members Only" option is activated. To change the department, a user from that department must deactivate the "Members Only" option. Once this has been done, you may change the department the property record is assigned to. If you wish to reactivate the "Members Only" option, you can do so once the department has been changed.

⚠ **Important:**
Administrators and users not assigned to a department have access to all property records.

Property Details Section: Type/Area Box

Before entering data in the Data box of the Property Details section, go to the Type/Area box. From the column “Type/Area” select the surface types that apply to the property in question and enter the surface details. There are many types of surfaces to choose from (e.g. you can have a five-storey building with retail space on the ground floor and office space from the first floor up). You can go through these fields using the Tab key. To add a surface type to the Type/Area box proceed as follows:

1. Click on the plus icon located above the Type/Area box.

   A new line will appear in the box.

2. Click in the “Type/Area” field and select a surface type from the drop down list.

Fig. 3-7: “Type/Area” Drop Down List

3. Once you have chosen a surface type, tab into the next fields and enter the minimum and maximum available surface in m^2. (The minimum space available should be the minimum surface that the maximum or overall available surface can be divided into.) Next, enter the rent price per m^2 and the sale price for the surface described in this row.

➔ **Tip:**
If you enter a maximum m^2 that is smaller than the minimum m^2, PRIMO will warn you of this and not accept the entry.

4. The “Rent/m^2” field should contain the minimum rent per m^2 in order to assure the widest range of matching requirements.
5. Enter the purchase price for the surface described in this row in the “Price” field. The sale price should be based on the maximum surface available.

➔ **Tip:**
When matching properties to requirements, PRIMO takes the surface, rent and sale price information from the Type/Area box. Be aware that PRIMO processes minimum and maximum amounts very precisely when matching properties to requirements. Therefore, if you enter the highest value and not the lowest in the Type/Area box, you are limiting the number of requirements that might fit the property description. (E.g. if a property owner is asking £20/m^2 for his property and there is a requirement that matches all the property's criteria, but the client is only willing to pay £19/m^2, this client’s requirement will never appear in the match list if you entered £20 in the Type/Area rent field).

6. You may enter a short remark of up to 80 characters in the “Notice” field.

➔ **Tip:**
Each time you add a new line to the Type/Area box it is automatically check-marked as a line to be used by PRIMO when it matches properties to requirements. If you wish PRIMO to disregard a line in the Type/Area box when it matches the property to requirements, deactivate the check-box located at the front of the line.

The Type/Area box should be used both for matching purposes and to describe a property’s space allocation. Therefore, if you do not wish a particular line in the Type/Area box to be used for matching purposes, you should deactivate the check-box at the beginning of the line instead of deleting the entry.

7. For each additional line you wish to add to the Type/Area box, repeat steps 1 through 6.

If you wish to delete a line, select it and click on the minus icon located above the Type/Area box.

Once you have divided the property surface over one or more lines in the Type/Area box, click on the “**!**” icon located above the box.

PRIMO will calculate the basic surface, rent and sale price based on the information you entered in the Type/Area box and fill in the corresponding fields in the Data box. If data was previously entered in the Data box, the following dialogue box will open:

Fig. 3-8: Dialogue Box: “Calculate?”

Click on “OK” if you wish to replace surface and price data previously entered in the Data box with newly calculated data taken from the Type/Area box.

Property Details Section: Data Box

Once PRIMO has auto-filled basic surface and price fields in the Data box, you should fill in the remainder of the fields in that box. Not all the fields are used for matching purposes, but they allow you to store other important information about a property. These fields are:

Type: Drop down list with a selection of entries set by your Program Administrator (cf. section entitled “Modifying Item Lists“, Chapter 15, “Administration“, page 15-15).

Site m^2: Total site surface in m^2.

GRZ: Does not apply to the English version.

GFZ: Does not apply to the English version.

Charges: Additional fees or charges.

Occupancy: Percentage of property occupied.

Yield: If you have entered rent and sale price values in the Type/Area box, the Yield field is one of the fields that will be automatically calculated when you click on the “**!**” icon. The yield is calculated by dividing the yearly rent by the sale price (Rent/Yr divided by Price).

No VAT and Fees incl.: Activate or deactivate these check-boxes depending on whether taxes and fees should be added to the price when a property is leased or sold.

The last row of fields in the Data box allows you to enter information such as when the property will be available, when it was built, how many units the property contains and how many parking spaces are available.

➔ **Tip:**
When creating property layouts, only the fields from the Data box can be used for merging purposes (cf. section entitled “Place Holders“, Chapter 13, “Layouts“, page 13-6). You may not use fields from the Type/Area or Attributes boxes for merging.

Property Details Section: Attributes Box

The Attributes box contains a list of criteria that further help to describe a property.

1. To add a property attribute to the Attributes box click on the plus icon located above the box.

   A new line will appear in the Attributes box and a drop down list with a selection of attributes will open:

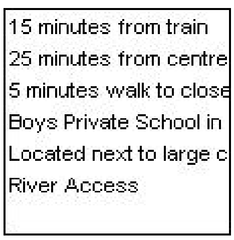

Fig. 3-9: “Attributes” Drop Down List

2. Select an attribute.
3. To add another attribute to the Attributes box, repeat steps 1 and 2.

Examples of Property Records

A few property record examples follow with, in each case, an illustration of the Address and Data pages.

Example 1: Office Building

An older building with approximately 850m^2 total surface and 650m^2 available for rent. The basement can be used for archiving. Rent/m^2 is £28.00 for office space and £9.00 for basement space. Four parking spaces are available. The available space is currently being renovated and will be ready in February 1998. The advertising agency, Retro-Design, has its offices (200m^2) on the ground floor.

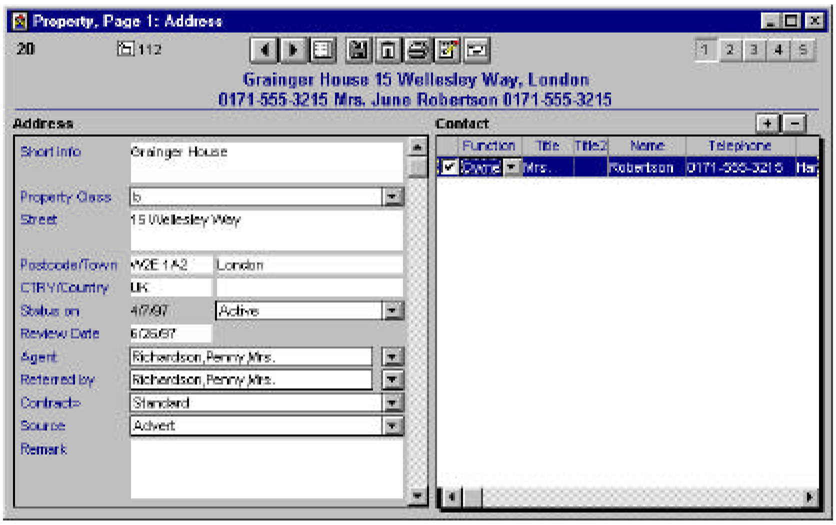

Fig. 3-10: *Example 1:* Office Building Address page

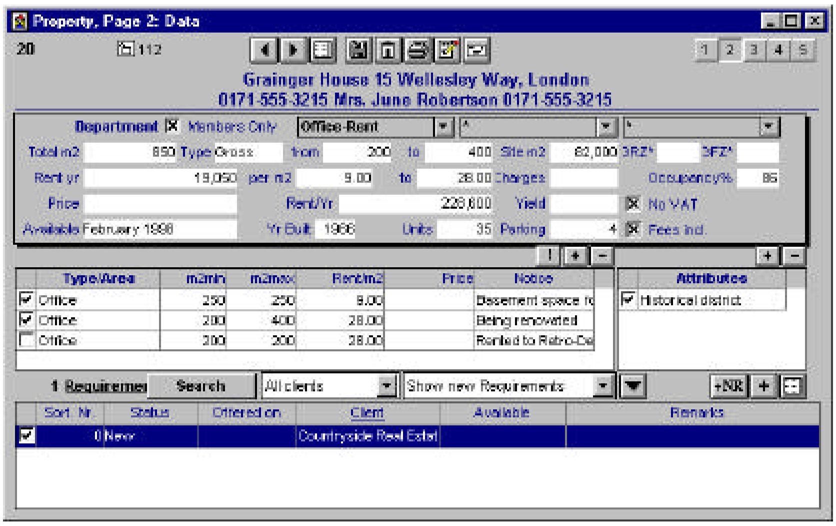

Fig. 3-11: *Example 1:* Office Building Data page

Example 2: Industrial Property

A mixed-usage property available in an industrial zone. The property includes office space, warehouse space and a loading zone that could work well for a furniture depot. The total space is divided into three units. The first unit was completed in 1995. The warehouse is located in unit D. The property has 320 assigned parking spaces. Interested parties should call Charles Bradwick and Co. of London to visit a model unit.

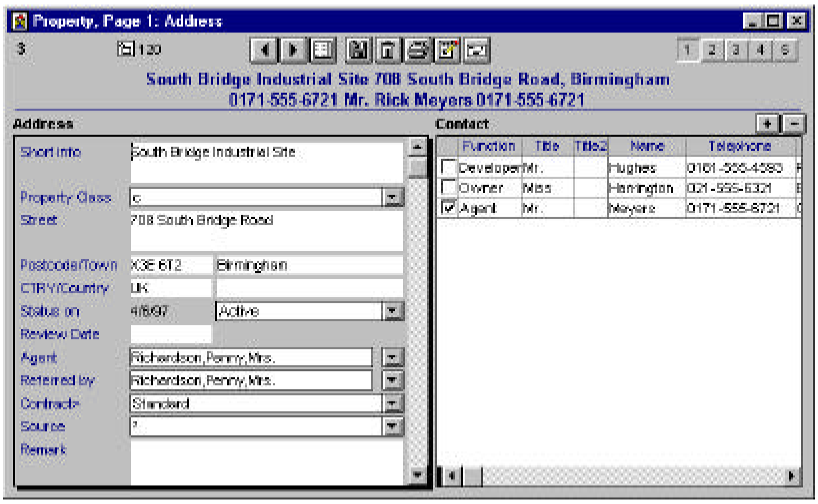

Fig. 3-12: *Example 2:* Industrial Property Address Page

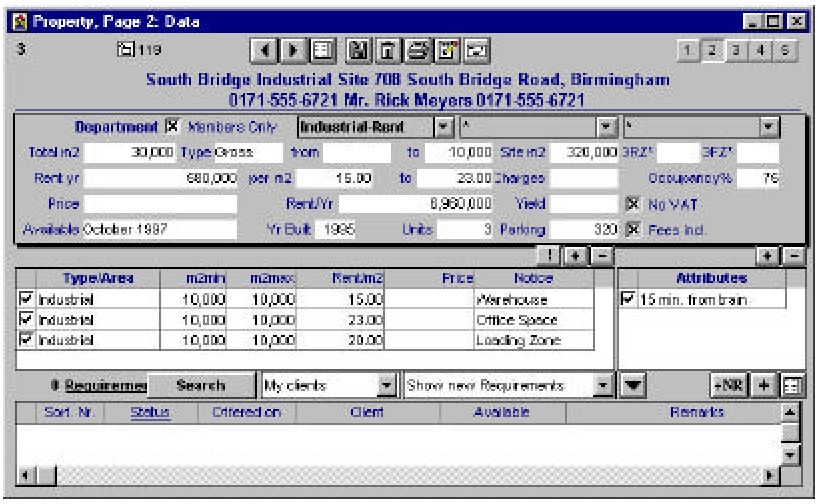

Fig. 3-13: *Example 2:* Industrial Property Data page

Example 3: Single Family Home

Single family home next to a common with approximately 124m^2 living space for £130,000. The house would generate a yearly rental income of £12,000.00 which works out to about £8.00/m^2. The house has a big garden and a small pond. The owner is Owner is Miss Hillary Hurley. The exclusive contract ends at the end of 1997.

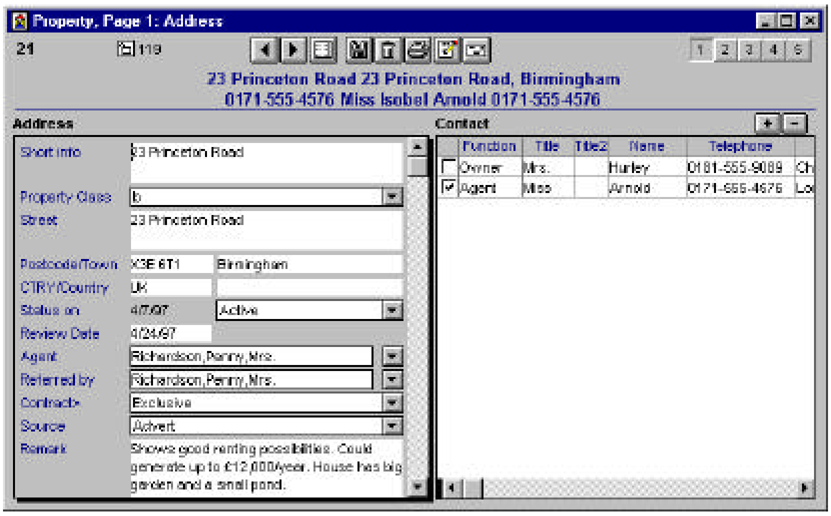

Fig. 3-14: *Example 3*: Single Family Home Address page

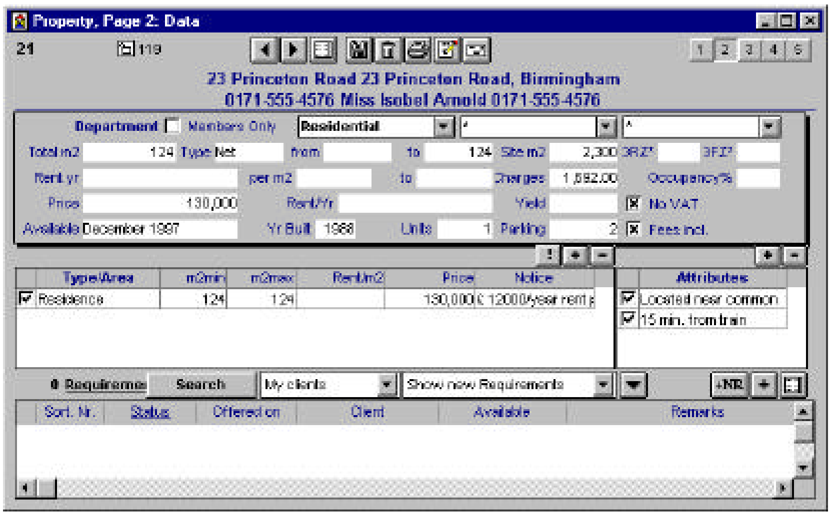

Fig. 3-15: *Example 3*: Single Family Home Data page

Example 4: Apartment Complex Development Project

Apartment complex with 55 units. Complex will include 25 two-bedroom flats, 15 three-bedroom flats, 10 four-bedroom flats and 5 five-bedroom flats. The developer's goal is to sell the whole complex upon completion to an investor. However, sale of individual flats is also a possibility. Project should be completed by the beginning of 1998. Listing shared with Donahue Real Estate.

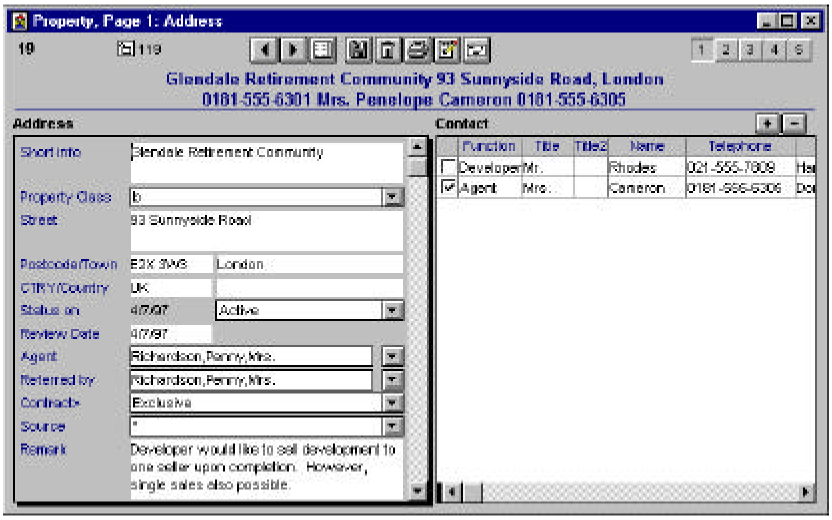

Fig. 3-16: *Example 4*: Apartment Complex Address page

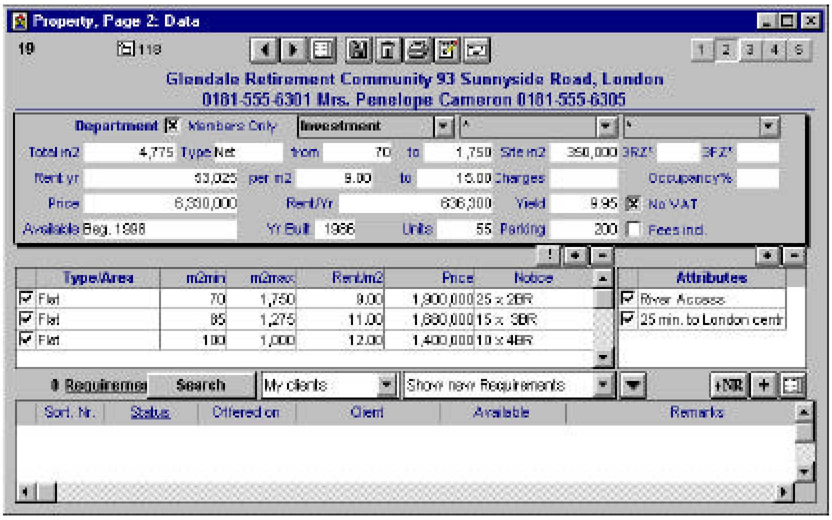

Fig. 3-17: *Example 4*: Apartment Complex Data page

Matching Section

The third section of the Property: Data page is the Matching section. This section allows you to:

- search for requirements that best match the property's details,
- add to and display requirements from a previous match,
- add specific non-matched requirements to the list,
- assess the offer suitability of the listed requirements,
- select requirements to be offered.

⚠ **Important:**
When matching properties to requirements, PRIMO will only consider requirements records with an “Active” status.

Deactivating Search Criteria in the Type/Area and Attributes Boxes

If you do not wish to have certain criteria you have entered in the Type/Area and Attributes boxes to be used by PRIMO for matching purposes, deactivate the check-box next to the row of criteria you would like PRIMO to disregard. To reactivate the row of criteria, simply click in the check-box at the beginning of the row. You should only delete a row of criteria from these boxes if they no longer apply to the property.

Searching for Matching Requirements

Once you have entered data in the Property: Address page and Property: Data page, you can search for matching requirements by clicking on the "Search" button located above the match list.

➔ **Tip:**
Do not modify the default selections in the drop down lists next to the “Search” button until after the first search is completed.

Once you have clicked on the "Search" button, PRIMO will look for all requirements matching the property criteria you have entered.

All new requirements matching the property criteria will be listed in the Matching section. The number of requirements that match the property criteria will be entered next to the word "Requirement" located to the left of the "Search" button.

Each requirement listed in the Matching section shows the following information: requirement status, date requirement was offered, client name, move-in date, remarks.

The term "status" in the Matching sections refers to the offer status of a listed requirement in connection with this particular property. It does not refer to "status" entered on the Address page of the requirement record. Finally, if the status entered on the Address page of a requirement record is not "Active", that record will not be taken into consideration by PRIMO when it searches for matching requirements. The meaning of the term "status" in the Matching section is further explained in the section entitled “Requirement Suitability“ in this chapter, page 3-21.

Filtering Matched Requirements

You can vary how you view the list of matched requirements by using filters. Matched requirements that are filtered out are not deleted from the Matching section. They can be viewed again with the use of different or no filters.

✓ **Prerequisite:**
You are on the Data page of a property record and have found requirements that match the property's criteria.

1. Open the drop down list located to the right of the “Search” button.

   Select whether you would like to see requirements belonging to your clients only or to everybody's clients. The filter that is selected by default is set by the Program Administrator (cf. section entitled “User Rights“, Chapter 15, “Administration“, page 15-25).

2. Open the second drop down list after the "Search" button and select one of the following filters:

   "Show new requirements" lists all requirements with the offer status "New".

   "Show all requirements" lists all requirements, regardless of their offer status.

   "Show requirements to offer" lists only those requirements that you have checkmarked as requirements you wish to offer (cf. section entitled “Requirement Suitability“ in this chapter, page 3-21).

   "Show offered requirements" lists all requirements that have been offered.

   "Show reserved requirements" lists all requirements that you may wish to offer at a later date (cf. section entitled “Requirement Suitability“ in this chapter, page 3-21).

   "Hide uninteresting requirements" hides all requirements except those you have an interest in offering, or have already offered. This option gives you a more accurate list of the requirements that best match the property in question (cf. section entitled “Requirement Suitability“ in this chapter, page 3-21).

Sorting and Configuring the Match List

To sort the match list you can:

- choose the column title you wish to see the listed sorted by and click or double-click on the title to sort the list in ascending or descending order.
- assign a sort number to each line in the list and click or double-click on the “Sort Nr.” column title to numerically sort the list in ascending or descending order.

You can add or remove columns from a list, you can move them within the list and finally, you can even change a column's width.

These commands are described in the section entitled “Working with Lists“, Chapter 6, “Lists“, page 6-5. Take special note of the chapter explaining the sorting possibilities of match lists (cf. section entitled “Working with Match Lists“, Chapter 6, “Lists“, page 6-13).

The list of matched requirements can be transferred into a Requirement Search and List window by clicking on the list icon located above the match list to the far right.

➔ **Tip:**
The date in the field "Date offered" is automatically entered by PRIMO when an offer is made. The offer date cannot be changed manually.

Adding Non-Matched Requirements to the Match List

Before a property can be offered, that property must first be matched to one or more requirements. Usually clicking on the "Search" button will list any requirement that matches a property's criteria. However, there may be a requirement that you feel should be in the match list, even if it does not exactly fit the property's criteria.

There are two ways of adding a requirement to a match list:

- *Example A:* by searching for a requirement using a Requirement Search and List window
- *Example B:* by entering the reference number of the requirement record you wish to add

Example A:

1. Click on the “**+**” icon located above the match list.

   A Requirement Search and List window will open.
2. Search for the requirements that you would like to add to the Property: Data page Matching section (cf. section entitled “Extending and Reducing Lists“, Chapter 6, “Lists“, page 6-11).
3. Once you have a list of requirements, select the requirements that you would like to add to the Property: Data page Matching section.

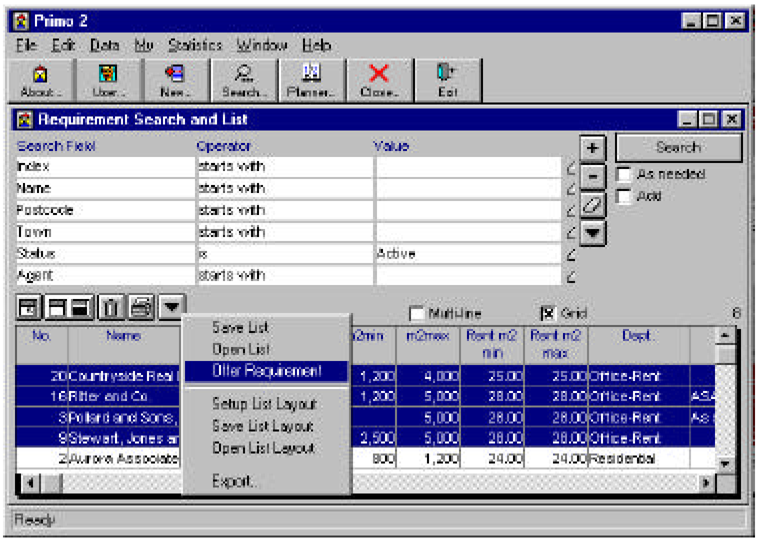

Fig. 3-18: List of Requirements to Add to Property: Data page

4. Click on the down arrow in the list toolbar in the Search and List window and select the command "Offer Requirement".

   The Requirement Search and List window will automatically close itself and you will see that the records you selected have been inserted into the Matching section of the Property: Data page. The default offer status for newly added records is "New".

   If one of the requirements you wish to add to the Matching section is already in the match list, you will get the following message:

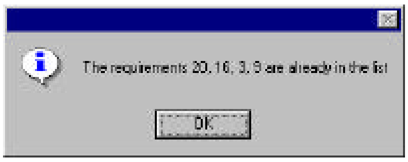

Fig. 3-19: Message Box: “This requirement is already in the list”

5. Click on “OK”.

   The requirement you have selected is not added to the match list and the Requirement Search and List window remains open so that you may perform another search.

Example B:

1. Click on the “**+NR**” icon located above the match list.

   A dialogue box will open:

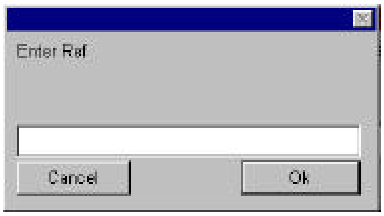

Fig. 3-20: Dialogue Box: “Enter Ref.”

2. Enter the reference number of the requirement record you wish to add to the match list and click on OK.

   The requirement record is added to the list and the dialogue box immediately re-opens.

   If you wish to add another requirement record to the list, enter the reference number, otherwise close the dialogue box by clicking on "Cancel". All newly added requirements are automatically given the offer status "New".

➔ **Tip:**
All requirements added to the Matching section of the Property: Data page will be listed at the top of the match list in order of arrival.

Requirement Suitability

Before you offer a requirement, you may want to make sure that it suits the property's criteria. You may, therefore, wish to open the requirement record to view it in more detail.

1. Open the requirement record by selecting it from the match list and double-clicking on it or pressing F2.
2. Go through the requirement record to confirm your decision to offer it.

➔ **Tip:**
You can transfer requirements listed in a match list to a Requirement Search and List window. To do this, click on the list icon above the match list. Once you have transposed the match list into the Requirement Search and List window, you can manipulate the list, print it and even export it if your Program Administrator has given you authority to do so (cf. section entitled “Working with Lists“, Chapter 6, “Lists“, page 6-5).

When assigning an offer status to a requirement record in a match list, you have four possibilities:

"New" for requirements that are current, recently added and have not yet been offered.

"Uninteresting" describes a requirement that may match the property's criteria, but is not a suitable proposition.

"Reserve" puts a requirement on hold until you are ready to offer it to a client.

"Offered on" is automatically selected by PRIMO once you have made an offer. This status cannot be manually altered. If you try to manually enter the status "Offered on" as well as an offer date, you will get the following message:

Fig. 3-21: "You must create an offer..." Message Box

3. To select an offer status, click in the Status field of the match list.

   A drop down list will open listing all four statuses. Choose one of the first three.

Once you have changed the status of the requirements in the match list, update the Matching section as follows:

1. Select "Show new requirements" from the drop down list above the match list and click on the "Search" button.

   The list will now show only those records with the offer status "New".

2. Activate the check-box of all the requirements you wish to offer.

⚠ **Important:**
If a property record is not under contract and you wish to activate the check-box of a requirement that matches the property's details, (cf. section entitled "Entering Data in the Property: Address page" in this chapter, page 3-6), you will get the following warning:

Fig. 3-22: Dialogue Box: "The following property is not under contract"

"The following property is not under contract... Offer it anyway?" If you answer "No", the requirement will not be offered, if you answer "Yes" the check-box will be activated and the requirement will be offered.

You may now write an offer to your client. Click on the "envelope" icon that is added to the record toolbar of requirement and property records. For more information on how to create an offer, see Chapter 10, "Offers".

Property: Contracts page

Rental contracts, their duration, as well as other options such as calculated indexed increases can be managed by PRIMO. The Property: Contracts page offers two views of contracts that can be chosen from the drop down list located below the record header.

- Contracts: information regarding each specific contract (tenant, lease duration and options, space rented, rate, commission, expenses)
- Rental Income: cash flow report calculated by PRIMO based on rental income for the next few years

Creating a Property Contract

To add a contract to a property record, proceed as follows:

1. Open the property record to which you wish to add a contract.
2. Go to the contract page of the property record.
3. Click on the "**+**" icon above the (empty) list.

   A new contract record window will open.

Entering Data in Property Contract Record

The Property Contract page is divided into three sections:

- Record header
- Tenant section
- Surface section

Record Header

The record header will contain the record toolbar and the title bar. A plus icon has been added to the toolbar of the contract record to make it easier for you to add more than one contract to a property record. When you create a new contract record, PRIMO automatically copies information from the "Short info" field of the Property: Address page to the contract record title bar.

Tenant Section

The "Project", "Created by" and "Modified by" fields are automatically filled in by PRIMO when you create a new contract record. These fields cannot be modified.

Add a **tenant** as follows:

1. At the top of the record is a button entitled "Tenant". Click on the blank button next to it on the right.

   The following dialogue box appears:

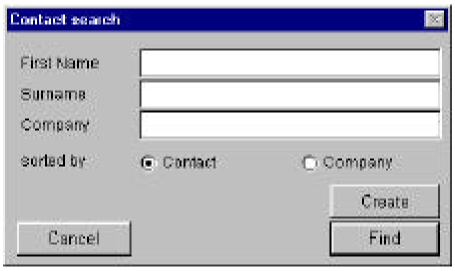

Abb. 3-23: Dialogue Box “Contact search“

2. Enter the name of a company or a contact.
3. Click on the “Find“ button.

   If only one contact record matches the search criteria you have entered, then that contact will automatically be chosen as the tenant.
4. If several contacts are found, then you will be given a list of contacts to choose from.
5. If no contacts are found, click on the “Create” button.

⚠ **Important:**
Use the “Create” function with caution! Be absolutely sure that the contact record you wish to create does not already exist. It could be, for example, that the contact’s name is spelled slightly differently than you expect, or that the organisation record exists, but the contact does not.

➔ **Tip:**
Clicking on the “Create” button will create a new organisation record as well as a new contact record. However, the records will only contain the information you have entered in the “Contact search“ dialogue box. Once you have created an organisation and contact in this fashion, you should click on the “Tenant” button to go to the organisation record and fill it in correctly.

6. Choose the **agent** responsible for the contract from the “Agent” field drop down list.

Enter the **Lease duration** as follows:

1. Click in the “from” field.

   The pop-up calendar will open.
2. Select the first day of the lease and click on “Ok”.
3. Click in the “to” field.

   The pop-up calendar will open.

   Enter the last day of the lease in the “to” field if necessary.

➔ **Tip:**
When you click in the “to” field, PRIMO automatically copies into it the date you entered in the “from” field (e.g. 01/04/1996). If you do not wish to enter a date in this field, click on the “Cancel” button on the pop-up calendar and erase the date that

PRIMO copied into the field. To enter a date once you are in the “to” field, proceed as follows:

- Click on the arrow to the right of the year in the pop-up calendar to change the year (e.g. 01/04/2001).
- Click on the arrows on either side of the month in the pop-up calendar to change the month (e.g. 01/03/2001).
- Use the arrow keys on your keyboard to choose the correct day of the month (e.g. 31/03/2001).
- Press the Esc key or click on the pop-calendar’s “Cancel” button and enter the date manually.

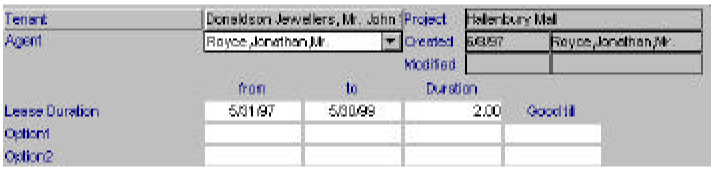

Abb. 3-24: Upper portion of the contract record

4. When you click in the “**Duration**” field, PRIMO will automatically calculate the duration of the lease based on the dates you entered in the “from” and “to” fields. The duration of the lease is shown in years and fractions thereof (e.g. 2.5 = 2½) You may also enter the lease duration manually.
5. The “**Option 1**” and **“Option 2”** fields are entered in the same way as you would the “Duration” fields.

Surface Section

Fill in the **Surface** fields line by line as follows:

1. Click on the “**+**” icon to add a new line to the Surface section.
2. Choose the type of surface from the drop down list in the "SF Usage" field, then tab into the remaining fields to enter the rent and surface amounts. You may also add a short remark of up to 80 characters.

To determine the **initial monthly rent** and the **rent free period** proceed as follows:

1. Click on the “Initial Rent” button.
2. The first month’s rent will automatically be calculated using information entered in the surface fields.
3. Tab to the “Rent free period” field and enter the number of months, if applicable.

If the contract provides for a scheduled **rent increase**, proceed as follows:

1. Click in the “Increase date” field.

   The pop-up calendar opens and PRIMO automatically selects a date that is one year later than the date of the initial rent price or the last increase.

2. Whether you keep the date PRIMO has selected or change the date, click on “OK” once you are done.

   The increase date is entered in the field.
3. Tab into the fields below to enter *either* the amount of the increase or the percentage (the fields you leave blank will be automatically calculated later).

➔ **Tip:**
When entering percentages, you must either enter a number followed by a percentage symbol (5%), or you must enter the number in decimal format (e.g. .05 for 5%).

4. Click on the "Initial Rent" button to calculate the scheduled increases.

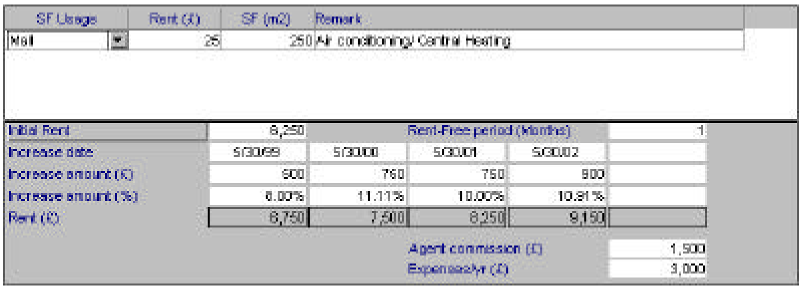

Abb. 3-25: Lower portion of the contract record

Enter the two fields at the bottom right of the contract record as follows:

1. **Agent’s commission,** if applicable
2. **Property expenses per year**

Click on the “**+**“ icon located on the record toolbar to add another contract to the property record. Before opening a new contract record, PRIMO asks you if you would like to save the one you have been working on.

Rental Income

Once you are back on the Property: Contracts page, you can view a table listing the rental income per tenant by selecting “Rental Income” from the drop down list located below the record header.

Property: Documents page

The Documents page of a property record can contain any of the following property documents:

- Fact Sheet 1
- Fact Sheet 2
- Offer-text

- Newspaper Advert
- Window display
- Update explanation
- Tenant information

➔ **Tip:**
It is the Program Administrator who determines the type and number of property documents listed on the Documents page of a property record (cf. section entitled “Property Documents“, Chapter 15, “Administration“, page 15-17).

Previously created property documents are listed in a document list. The list columns are titled as follows:

- Type (of document)
- Created
- User
- Language
- Remark
- Document status (active/inactive)

➔ **Tip:**
The first three fields are automatically entered when you add a property document to the document list.

If you have added more than three property documents to the document list, a scrollbar will appear to the right of the list.

To add a property document to the list click on the “**+**“ icon and to remove a property document from the list click on the “**-**“ icon.

Adding and Formatting a Property Document

PRIMO’s integrated word processor is explained in Chapter 9, “Word Processor“. Tips, such as how to minimise and maximise the word processor window, can be found in section entitled “Changing a Window Size“, Chapter 1, “Basic Functions“, page 1-16.

You'll find two examples of property documents in section entitled “Offer-Layout Examples“, Chapter 13, “Layouts“, page 13-20. The examples will show you how all these documents are tied together.

➔ **Tip:**
If your time for working on a record has run out, you will not be able to modify the document you were working on, nor add a new one (cf. keyword “Timer” in section entitled “Record Headers“, Chapter 1, “Basic Functions“, page 1-12).

Adding a Document

1. Click on the ”**+**“ icon next to the document list.
2. Select the type of document you wish to add from the pop-up menu.

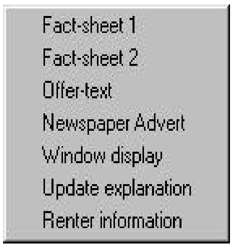

Fig. 3-26: “Document Type” Pop-up Menu

3. Enter a short remark in the Remark field describing the document you have just added to the list.

   All the other fields will already be filled in by PRIMO. Automatically filled in fields (except the Active check-box) cannot be altered manually.

   As a rule, your new document is formatted by choosing a layout format.

➔ **Tip:**
PRIMO layouts are not limited to containing pre-formatted text. They can also contain "place holders" which are database keywords and commands that are replaced with information from the database when you do a merge. For example, when creating a Property Layout, you can add "place holders" from the property section of the database and when you merge the layout from within a record, the information from the record you are working on is added to the layout thereby creating a new property document using a basic layout. Properly formatted layouts require very little tweaking once merged.

The creation and formatting of layouts is described in Chapter 13, “Layouts“.

4. Click on the Layout button located next to the document list and select the desired layout from the Layout dialogue box.

   A document containing formatted text and "place holders" will open.

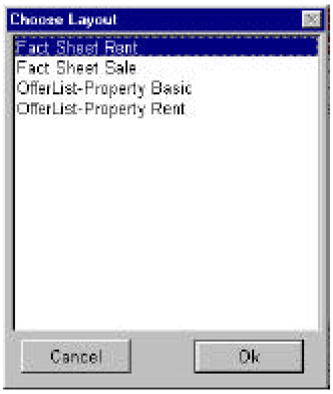

Fig. 3-27: “Layout” Dialogue Box

⚠ **Important:**
If you open a document from the document list and click on the Layout button, the layout you choose will replace any text you may have already entered.

If you do not want to discard the document you have already created you have two choices:

- copy the document temporarily into the clipboard so that you can insert it somewhere else (select the document and press on Ctrl+C).
- select "Save as" from the word processor File menu (above left of document), and save the document on your hard disk for later use.

5. If you have selected a new layout to replace your previous document, click on the Merge button to complete the process.
6. Review the document and make any necessary modifications.

Reviewing Documents

The first document in the document list is the one you see when you go to the Documents page of a property record.

An arrow points to the document in the document list that is currently being viewed.

To view a document in the document list, click on it (you can also go through the list using the Tab key).

➔ **Tip:**
Documents with charts or images can take a while to open.

To remove a document from the document list click on the “**-**“ icon.

Property: Activities page

The last page of the Property record lists all activities linked to this record, such as phone calls, meetings, to-dos, histories, memos, letters, OLE documents, etc.

From here you can open any linked activity record, and can even add an activity record to the Property record. For more information regarding creating activity records see Chapter 5, “Activities“.

You can sort the activities listed on the Activities page of the Property record. For an explanation on how to sort lists, see the section entitled “Sorting Lists“, Chapter 6, “Lists“, page 6-12. Furthermore, several filters are available to reduce the list of activities to those you are interested in. For example, you can reduce the list of activities to show only those activities of the type "History". This particular example demonstrates how you could inform a property owner of the people who were offered his/her property.

The Activities page is always located on the last page of a record (Organisation, Property and Requirement), and works the same way for all records. The only difference being the choice of filters from one type of record to another. For a more detailed explanation of the Activities page, see the section entitled “The Activities page for Organisation, Property and Requirement Records“, Chapter 5, “Activities“, page 5-2.