
Course: Lease Record: Alerts
Key TakeawaysCONFIGURATION/SETUP

Alerts Overview

Key Sections**Alerts Overview****Takeaways**

- Allow user to manage hundreds of critical dates for various lease records.
- A Critical Date indicates the date by which an action has taken or must take place.
- An Alert is the notification of those critical and other dates, which remind a user to act.
- 3 types of critical dates:
 - o Lease Critical Dates
 - Ex: Commencement & End Dates
 - o Clause Critical Dates
 - Ex: Renewals & Early Terminations
 - o Financial Critical Dates
 - Ex: Base Rent Escalations & Operating Expenses
- Create alerts at the lease level or in bulk through Multiple Lease Update functionality.

Lease Alerts Tab

Lease Alerts Tab

- Add, Edit and Delete alerts on a lease.
- View future and sent alerts with the ability to export to Excel.
- Custom alert is the only alert not based on a critical date; users must specify a calendar date to trigger the alert.
- Alerts created on the lease record can be sent to multiple recipients with multiple dates.

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CONFIGURATION/SETUP

Multiple Lease Update

Key Sections

Multiple Lease Update Tool

Takeaways

- Select leases to add alert to by selecting lease criteria, creating a fixed list of leases or loading a saved filter.
- Supports a single recipient and notification date.
- Custom alert option is not available for bulk alerts.