



Portfolio Management User Guide

LeaseAccelerator

Version 26.3



Document Information

Notices

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Disclaimer

This guide is designed to help you to use the LeaseAccelerator applications effectively and efficiently. All data shown in graphics are provided as examples only. The example companies and calculations herein are fictitious. No association with any real company or organization is intended or should be inferred.

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Portfolio Management

Once a deal has been booked, LeaseAccelerator automatically creates a Deal Summary for the lease.

Deal Summary captures the following:

- Lease Contract Details
- Asset Details
- Mid-term and End-of-Term Options and Obligations

Use the Deal Summary to manage adjustments to the lease after it has been booked.

Deal Summary

The Deal Summary workspace includes the following tiles:

- Participants
- Details
- Terms
- Expenses
- Notifications
- Related Deals
- Summary

Participants Tile

The **Participants** tile pre-populates with the Participants entered for upstream documents during the leasing process; for example, Schedule Participants or LVB Participants.

Deal Summary

Participants	Details	Terms	Expenses	Notifications	Related Deals	Summary
--------------	---------	-------	----------	---------------	---------------	---------

Make Changes Effective:

⚠️ Backdated changes to any Asset Level or Allocation Level attribute on this screen that pre-date a previously recorded change to the same Participant will overwrite those values.

BU:*	Acme Business Solutions		
Entity:	Acme Communications Corporation		
Tenant:*	Acme, Inc.		
Ship To:*	New York [901 Freedom Plaza]		
Geographic Area:*	US		
Analyst:	Corinna Rost		
Order Administrator:	Harper Walls		
Asset Owner:*	Albert Coffee		
Asset User:	Anita Haupt		
Vendor:	A1 Vending		
Landlord:*	A1 Leasing		
Treasury Approver:*	Enola Turner		
Sourcing Contact:	Corinna Rost		
LAS Staff:			
Reporting Area:	Acme Arizona		
Developer:	Corinna Rost		

Click in selector to see suggested options.

*Required

Key Features Include:

Adding Participants for certain role types such as Asset User or Vendor. To add a Participant, click the plus sign to the right of the field.

Asset User:

X

Charleston Roesler

Vendor:

X

AZ Vendor

Reveal linked Participants by click the filter icon to the right of the field. This will show you which Participants are linked to others and where one is dependent on another.

BU:*	Acme Business Solutions	⊗	⏏
Entity:	Acme Communications Corporation	⊗	⏏
Tenant:*	Acme, Inc.	⊗	⏏
Ship To:*	New York [901 Freedom Plaza]	⊗	⏏
Geographic Area:*	US	⊗	⏏
Analyst:	Corinna Rost	⊗	⏏
Order Administrator:	Harper Walls	⊗	
Asset Owner:*	Albert Coffee	⊗	
Asset User:	Anita Haupt	⊗	+
Vendor:	A1 Vending	⊗	+
Landlord:*	A1 Leasing	⊗	
Treasury Approver:*	Enola Turner	⊗	⏏

Applying filters and showing available Participants by clicking the target icon and then selecting which filters to apply.

BU:*	Acme Business Solutions	⊗	• Show active SBUs with filters applied - Show all active SBUs (unfiltered) - Show all SBUs, including OBSOLETE
Entity:	Acme Communications Corporation	⊗	
Tenant:*	Acme, Inc.	⊗	

Details Tile

The **Details** tile summarizes the asset information entered during schedule entry.

Deal Summary

Participants
Details
Terms
Expenses
Notifications
Related Deals
Summary

Deal Summary #: Acme 1
Currency: USD
Comments: Cap-Op Vanilla Lease

Deal Tags: +
Deal Status: Active
Accounting Classification: Capital (ASC 840, ASC 842, IAS 17, IFRS 16) Reclassify
Reasonably Certain EOT Option: Return @ month 36; lessee must provide notice of intent to exercise at least 0 days before EOT; Lessee has the option to return the assets at end of lease.
Reasonably Certain Holding Period: 36
Ref Lessee PO #: Vendor Ref #:
Purpose:
Lessor Reference #:

Summary by Asset Type:

Computers/Peripherals	\$350,000.00	
Total Hard Costs:	\$350,000.00	Total Soft Costs: 0.00%
	100.00%	
Total Costs:		\$350,000.00

Total Quoted Price: \$350,000.00
Down Payment:
Net Amount Financed: \$350,000.00

Acceptance Date: Commencement Date: Jan 1 2019
Amount Funded: Date Funded (Reported):

Accounting Classification Analysis

Summary of Tests

All classification tests will be performed for all standards by default.

ASC 840	IAS 17	ASC 842	IFRS 16
Materiality Threshold: No	Materiality Threshold: No	Materiality Threshold: No	Materiality Threshold: No
Short Term Lease: No	Short Term Lease: No	Short Term Lease: No	Short Term Lease: No
Cancellable: No	Cancellable: No	Cancellable: No	Cancellable: No
90% of Lease Payments: No	PV of Lease Payments: No	PV of Lease Payments: No	Ownership Transfer: No
75% of Economic Life: No	75% of Economic Life: No	Economic Life: No	Interrelated Assets: No
Ownership Transfer: No	Ownership Transfer: No	Ownership Transfer: No	Small Value: No
Bargain Purchase: No	Bargain Purchase: No	Likely Purchase: No	Classification: Finance
Classification: Operating	Specialized Assets: No	Specialized Assets: No	
	Classification: Operating	Classification: Capitalized-Operating	

Reclassify Effective: January 2020 (Commencement Date)

Refresh Classification

Classification results are displayed based on the last analysis performed and saved, this is what is used by the accounting engine and reports. If you would like to refresh the results click on the Refresh Classification button and then on the Save Accounting Classification button to apply refreshed classification to accounting calculations.

Analysis by Category

Deal Characteristics

Save Accounting Classification

It is from this tile that you can Reclassify a deal once booked. By clicking the **Reclassify** button you are directed to the Accounting Classification Analysis workspace.

From here you may override the automatic classification by selecting the standard you would like to override and choosing from the drop-down menu and inputting an override explanation. An Override Explanation is required to save any change in accounting classification. **Do not forget to input the reclassify effective date, and do not click the Refresh Classification button.**

Accounting Classification Analysis

Summary of Tests

⚠ All classification tests will be performed for all standards by default.

ASC 840		IAS 17	
Materiality Threshold:	No	Materiality Threshold:	No
Short Term Lease:	No	Short Term Lease:	No
Cancellable:	No	Cancellable:	No
90% of Lease Payments:	No	PV of Lease Payments:	No
75% of Economic Life:	No	75% of Economic Life:	No
Ownership Transfer:	No	Ownership Transfer:	No
Bargain Purchase:	No	Bargain Purchase:	No
Classification:	Capital	Specialized Assets:	No
		Classification:	Operating

Override: Capital Override:

Override(s) Explanation:

⚠ This will change the accounting classification of the transaction.

You may also change details in the Analysis by Category section if the particulars of the schedule are different than the system generated results based on the configured Corporate Policy settings. This could result in reclassification of the lease.

Analysis by Category									
Lease Treatment	Category	Net Cost	Is Major Part of Economic Life?			Purchase Option		PV is Substantially All Value?	
Lease Component	Office Equipment	\$350,000.00	Yes	Contractual Term:	36	☐ Bargain	Lease Terms:	Not Set	Yes
				Expected Term:	36	☐ Likely	Bargain Purchase Threshold:	10% PV	Contractual Lease Terms:
				Economic Life:	36		Reasonable Certainty Threshold:	10% PV	Expected Lease Terms:
				Contractual % of Economic Life:	100%				Policy Threshold:
				Expected % of Economic Life:	100%				
				Policy Threshold:	75%				

Lastly, you may change Deal Characteristics from the default settings as may be appropriate for the individual schedule. These changes may also result in reclassification of the lease.

Deal Characteristics

Is the lease cancellable before end of term? No

Is ownership guaranteed to transfer to lessee at end of term? No

Are the assets specialized for lessee use? No

Are the assets dependent on or interrelated with other leased assets? No

Does the commencement date fall at or near the end of the economic life of the underlying asset?: No

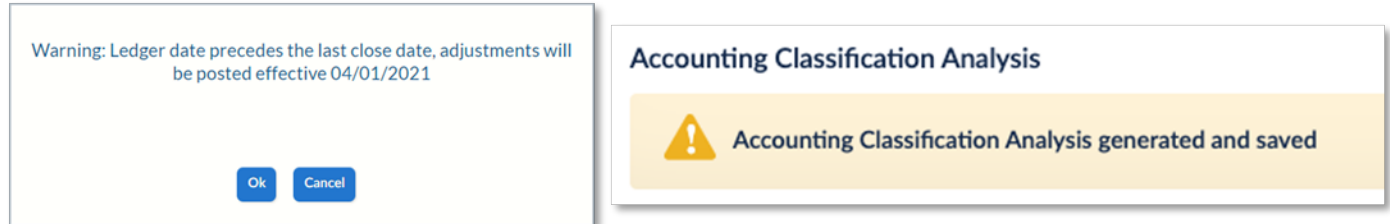
Land Only: No

PV at Rate: Use Default IBR

Expected Holding Period: months

Contractual Guaranteed Residual Value (GRV): USD

Once you have completed any edits/changes to the analysis, click the **Save Accounting Classification** button and the lease will be reclassified as of the Effective Date indicated. If this date is in a closed period, you will receive a pop-up notifying you when adjustments will be posted. Click **Ok**, and then you'll see notice that the Accounting Classification has been saved.



In Deal Summary, on the Summary tile, you will see any Reclassify Events listed. You will also see a kebab to the right of the event, which allows you to delete the accounting classification as necessary. If you delete all classifications, you will see *Not Yet Classified* in the Accounting Classification field in Deal Summary, no events in the *Reclassify Events* section, and a To Do and button for **Generate Accounting Classification** will reappear.

Reclassify Events:	Operating Lease (ASC 840 standard) at 3% effective 01/01/2020 by crost Finance Lease (IFRS 16 standard) at 3% effective 01/01/2020 by crost Operating Lease (IAS 17 standard) at 3% effective 01/01/2020 by crost Capitalized Operating Lease (ASC 842 standard) at 3% effective 01/01/2020 by crost
	Accounting Classification performed.Classified to Capital (IFRS 16); Capitalized-Operating (ASC 842); Operating (ASC 840, IAS 17) effective 01/01/2020

Terms Tile

On the **Terms** tile, all required fields are pre-populated with the terms entered during schedule entry.

Deal Summary

Participants
Details
Terms
Expenses
Notifications
Related Deals
Summary

Terms Taken From:*
Lessor-provided Schedule
Choose File
No file chosen

Payment Based On:*
Lease Rate Factor

Lease Type:*
True/Operating Lease (FMV)

Periodic Payment Frequency:*
Monthly
of Monthly Payments:*
36

Advance or Arrears:*
Advance

Down Payment:
0

☐ Enter LRF by Asset Type

Blended LRF: (e.g. 0.034729)*
0.0123456

Periodic Payment:
\$61,728.00
Payment Schedule Calculator

Interim Rent:
No interim interest/rent

Mid-Term/EOT Options:
Mid-Term/End-of-Term Options

Buyout @ End of Term
Terms: Purchase of FMV
Comments: Lessee has option to purchase asset(s) at fair market value at end of term

Return @ End of Term(Reasonably Certain)
Comments: Lessee has option to return asset at end of term

Renewal @ End of Term at month 37
Terms: 12 payments of FMV
Comments: Lessee has option to renew for 12 months at end of term.

Impairment

☐ Lessee must notify lessor of any material change in asset condition or location within days

*Required

Terms Take From:

The **Terms Taken From** field specifies what document was used to enter the terms relevant to the deal being summarized. The following sections are available:

- Lessor-provided Schedule
- Vendor-provided Term Sheet
- Funder Rate Card
- Other

Funder Rate Cards are ordinarily used with lease lines and pre-populate the terms. (Contact LeaseAccelerator Equipment Lease Sourcing if you are a Sourcing customer and want to have a Funder Rate Card configured for your lease line.)

Expenses Tile

On the **Expenses** tile, any related expenses that were populated during schedule entry will appear. You may add expenses through this workspace in the same manner. Please see the [User Guide to Entering a Lease \(Expense Tile\)](#) for more information on entering Related Expenses.

Deal Summary					
Participants Details Terms Expenses Notifications Related Deals Summary					
Record Expenses					
Related Expenses					
Type	Amount	Payable	Starting	Payee	
Lease Incentive: Paid to Lessee	\$1,000.00	Monthly	When Invoiced	Acme, Inc.	
IDC: Commission	\$1,000.00	Monthly	When Invoiced	A1 Leasing	

There are four types of expenses that automatically produce journal entries when entered on either the Expenses tile in the Schedule workspace or added after a deal has been booked on the Expenses tile in the Deal Summary workspace. Those expenses include:

- ARO-End of Life Cost
- Initial Direct Cost (IDC)
- Lease Incentive
- Security Deposit

Any other expense type entered as a Scheduled Related Expense, will not automatically produce journal entries. To see those entries, the expense must be invoiced or paid. Recording such an expense may be done either using a standalone import for Invoice Related Expenses or Paid Related Expenses, or through the user interface and the Capture Invoiced/Paid Expenses workspace.

Notifications Tile

Use the **Notifications** tile to specify the internal alerts you want to receive as part of managing active lease transactions. You can set up notifications to remind you to take action on mid-term/end-of-term options. You can also use scheduled notifications to initiate internal workflow processes, such as planning for decommissioning and refresh of equipment, in order to return leased equipment in a timely manner. Notifications entered here will add to any global notifications created during configuration for this particular schedule.

Deal Summary							
Participants Details Terms Expenses Notifications Related Deals Summary							
Automatic Notifications:							
Line #	Timing	Status	Recipients	Next Step	Deadline	Attachment(s)	
1	90 days before notification deadline send once	Scheduled	Asset Owner	Asset Owner to Record end-of-term intentions for assets approaching end of term		Automatically-generated attachment	
2	60 days before notification deadline every 2 Weeks until 30 days after first notification	Scheduled	Asset Owner	Asset Owner to Record end-of-term intentions for assets approaching end of term		Automatically-generated attachment	
3	30 days before end of term every 4 Days until 30 days after first notification	Sent	Asset Owner, Order Administrator, Treasury Approver	Asset Owner to Record end-of-term intentions for assets approaching end of term	5 days	Automatically-generated attachment	
4	120 days before notification deadline every 5 Days until 30 days after first notification	Scheduled	Asset Owner	Asset Owner to Record end-of-term intentions for assets approaching end of term		Automatically-generated attachment	

Notifications can be related to any of several events:

- The start of the lease (for example, for reminders to perform post-booking administrative or clerical actions)

- The end of the lease
- The exercise window for a mid-term or end-of-term option

When configuring notifications for end-of-term related processes, you should base the timing of the notification on the notification deadlines as required by the Lessor in the Lease Schedule and your internal operational needs.

- You can configure notifications as either;
 - One-time emails (using the Once options)
 - Recurring emails that are sent daily, weekly, or monthly for a pre-defined period of time

Selected notification email recipients correspond with the participants listed on the Participants tile.

As the participants in a deal (as captured in the Deal Summary and Asset Management workspaces) change over time, any notifications sent are automatically sent to the new participants.

The Notifications tile also gives you the ability to have a To-Do automatically enqueued when the notification is first sent.

To specify that you want to enqueue a To-Do:

- Check the Enqueue box
- Choose from the drop-down the action you want a specified user to take

The participant for whom you want the To-Do enqueued is specified by the role selected from the drop-down that has been assigned from the Participants tile in the lease process.

Note: While notifications can be sent to multiple participants in the deal, you must select a single participant type as being responsible for the To-Do to be enqueued.

When enqueueing a To-Do associated with a notification, you can also specify the deadline by which the To-Do should be acted upon. Depending on your configuration, LeaseAccelerator can automatically send out escalation notices when an action deadline has been missed.

- Timing: Date Notification sent
- Deadline: Date by which you must take action

Example: With Timing set to 120 days before end-of-term, enqueueing a To-Do to Record end-of-term intentions for assets approaching end-of-term and Action required within 30 days, you will get a notification 120 days before the end of term and have 30 days to declare whether you intend to purchase, return or renew the assets for the deal. If you do not declare your intentions within 30 days, an escalation email will be sent.

Commencement Date: 01/01/2019

Timing: 120 days before Notification deadline for: Return @ End of Term/Reasonably Certain

Send first e-mail on: 08/23/2021 (based on Notification deadline for date of 12/21/2021, which is 10 days before the last day of month 36)

Send email to:

- ☐ APF Requestor
- ☐ Accounting Analyst
- ☐ Accounting Approver
- ☐ Analyst
- ☒ Asset Owner
- ☐ Asset User
- ☐ Entity
- ☐ Treasury Approver
- ☐ Funder
- ☐ Lessee
- ☐ Order Administrator
- ☐ BU
- ☐ Ship To
- ☐ Sourcing Contact
- ☐ LAS Staff

every 5 days until 30 days after first notification is sent (until 09/22/2021; 7 times)

☒ Enqueue a to-do for: Record end-of-term intentions for assets approaching end of term Asset Owner One-Time To-do

☐ Action required within days

Consequences of Inaction:

Message:

Use Predefined E-mail Template: EOT 120 Reminder

Message Header:

Please note that the lease schedule referenced in this e-mail is due to expire in 120 days. Please declare your intentions for the assets at end of [automatically generated supplemental information]

Message Footer:

Required Update

Follow the steps below to set up an end-of-term notification:

Step	Action
1	Click the plus sign to add a new Notification.
2	In the <i>Timing</i> field, enter the number of days before the Notification deadline.
3	Select either Before or After from the drop-down.
4	Select Commencement , End of Term or Notification deadline for from the drop-down (this will determine when the first email is sent and that will auto-populate).
5	Check the boxes for the <i>Participants</i> you want to receive the notification email.
6	Indicate the frequency of the notification by selecting either Once or Every . When you select Every , you can choose Days, Weeks, or Monthly and also an until XX days after the first notification is sent.
7	Check Enqueue a To-Do and select appropriate option from the drop-down and select appropriate participant role.
8	Check Action required and populate days where appropriate.
9	Populate Consequences of Inaction where appropriate.
10	Populate information for the email message including Message Header and Message Footer. You may also select a predefined email template from the drop-down.
11	When all information is populated, click the Add button.
12	Be sure to navigate to the Summary tile and click Save at the bottom of that workspace to save any changes or additions to the deal.

Related Deals Tile

Use the **Related Deals** tile to create or view deal relationships between two or more deals in LeaseAccelerator. Deal Relationships may be created for one of the following reasons:

- Has a coterminous relationship
- Has a non-coterminous relationship
- Is a rollover
- Is an upgrade
- Is a buyout
- Will be a new schedule for MLA
- Is takedown for lease line
- Has a modification relationship

Some of these relationships will be automatically created when a Modification is done to an existing lease. Please see the Deal Modifications section of this guide for more details.

Deal Summary

Participants
Details
Terms
Expenses
Notifications
Related Deals
Summary

Related Deals

Create a Deal Relationship

Find Eligible Deals
This deal

Effective Date:
Aug 12 2021

Create Deal Relationship

Acme 3000-M001 has a modification relationship with Acme 3000 effective 06/01/2020

Summary Tile

The **Summary** tile shows, in summary form, the details, terms and any notifications entered for a deal. It includes a table displaying the payment schedule as well.

Deal Summary			
Participants	Details	Terms	Expenses
	Summary		
Deal Id:	34234	Lessor:	Aeme, Inc.
Transaction R:	Aeme S	Funder:	A1 Leasing
Bidding/Lender Date:	April 2021 @	Dsp To:	330 Acme Dr / Boston ,US,MA / US / 2019)
Commencement Date:	01/01/2019	LedgerID:	Aeme B42
Original Lease End Date:	12/31/2025	Deal Functional Currency:	USD
Effective Lease End Date:	12/31/2025		
Status:	Active		
Deal Type:			
EBL at Inception:	0		
Accounting Classification:	Capital (ASC 842, ASC 842, IAS 17, IFRS 16)		
Reasonably Certain EOT Option:	Return 8 month/26, lessee must provide notice of intent to exercise atleast 9 days before EOT. Lessee has the option to return the assets at end of lease.		
Reasonably Certain Holding Period:	26 @		
Comments:	Cap-Op/Vanilla Lease		
Recall Events:	Finance/Lessee (IFRS 16 standard) at 7% effective 04/01/2021 by credit Capital/Lessee (ASC 842 standard) at 7% effective 04/01/2021 by credit Finance/Lessee (IAS 17 standard) at 7% effective 04/01/2021 by credit Capital/Lessee (ASC 842 standard) at 7% effective 04/01/2021 by credit Accounting Classification performed, Classified to Capital (ASC 840, ASC 842, IAS 17, IFRS 16) effective 04/01/2021 Finance/Lessee (IAS 17 standard) at 7% effective 01/01/2019 by credit Finance/Lessee (IFRS 16 standard) at 7% effective 01/01/2019 by credit Capital/Lessee (ASC 840 standard) at 7% effective 01/01/2019 by credit Capital/Lessee (ASC 842 standard) at 7% effective 01/01/2019 by credit Accounting Classification performed, Classified to Capital (ASC 840, ASC 842, IAS 17, IFRS 16) effective 01/01/2019		
Mid Term/EOT Events:	No Termination Events have been recorded for this deal.		
Payment Adjustment Events:	No Payment Adjustment Events have been recorded for this deal.		
Fixed Cash:	EUR000000	Term:	24 Monthly Payments in Advance
Sat/Cash:			Monthly Fixed Payment Amount: EUR 300.00
Total Amount Financed:	EUR000000		Long-Maturity Payments Total Summ: EUR000000
			Cash off-Balance Purchase Subsum: EUR000000
			Initial Breakdown Category
			Report Breakdown Flow
			Term Breakdown Method
			Comments: Lessee has the right to purchase the assets at EOM and if there
			Paid up at End of Term (Residual Contract)
			Comments: Lessee has the right to purchase the assets at end of lease
			Amount of Final Residual Asset: 0
			Term guaranteed FTV and Guaranteed Overpayment
			Comments: Lessee has the right to purchase the assets at end of lease
Add Payment			
Payment Schedule:			
Due Date	Amount	Due Date	Amount
01/01/2019	\$30,000.00	01/01/2020	\$30,000.00
02/01/2019	\$30,000.00	02/01/2020	\$30,000.00
03/01/2019	\$30,000.00	03/01/2020	\$30,000.00
04/01/2019	\$30,000.00	04/01/2020	\$30,000.00
05/01/2019	\$30,000.00	05/01/2020	\$30,000.00
06/01/2019	\$30,000.00	06/01/2020	\$30,000.00
07/01/2019	\$30,000.00	07/01/2020	\$30,000.00
08/01/2019	\$30,000.00	08/01/2020	\$30,000.00
09/01/2019	\$30,000.00	09/01/2020	\$30,000.00
10/01/2019	\$30,000.00	10/01/2020	\$30,000.00
11/01/2019	\$30,000.00	11/01/2020	\$30,000.00
12/01/2019	\$30,000.00	12/01/2020	\$30,000.00
01/01/2020	\$30,000.00	01/01/2021	\$30,000.00
02/01/2020	\$30,000.00	02/01/2021	\$30,000.00
03/01/2020	\$30,000.00	03/01/2021	\$30,000.00
04/01/2020	\$30,000.00	04/01/2021	\$30,000.00
05/01/2020	\$30,000.00	05/01/2021	\$30,000.00
06/01/2020	\$30,000.00	06/01/2021	\$30,000.00
07/01/2020	\$30,000.00	07/01/2021	\$30,000.00
08/01/2020	\$30,000.00	08/01/2021	\$30,000.00
09/01/2020	\$30,000.00	09/01/2021	\$30,000.00
10/01/2020	\$30,000.00	10/01/2021	\$30,000.00
11/01/2020	\$30,000.00	11/01/2021	\$30,000.00
12/01/2020	\$30,000.00	12/01/2021	\$30,000.00

Making Changes in Deal Summary

Changes made from Deal Summary can trigger adjustments to ensure consistency for elements of the deal. As a result, certain changes require an Effective Date to be identified. These include any changes to Participants on the Participants tile. The **Make Changes Effective** field by default is blank. If changes are made on the Participants tile and a date is not entered in this field, you will be prompted upon saving that you must enter a date.

Deal Summary

Participants
Details
Terms
Expenses
Notifications
Related Deals
Summary

 You are making a change to a Participant that requires you to supply an effective date of change.

Make Changes Effective:

▼

▼



 Backdated changes to any Asset Level or Allocation Level attribute on this screen that pre-date a previously recorded change to the same Participant will overwrite those values.

Changes to data on any other tile may result in an automatic rebooking of the deal and an automatically enqueued To-Do to regenerate the Accounting Classification Analysis. To follow best practice methods for error corrections and true changes or modifications to leases, please see the various user guides available: [User Guide to Error Corrections](#), [User Guide to Deal Changes](#), and [User Guide to Deal Modifications](#).

Life Cycle Events

Many events may occur during the life of a lease. LeaseAccelerator has the ability to capture these events as they happen. These life cycle events may include:

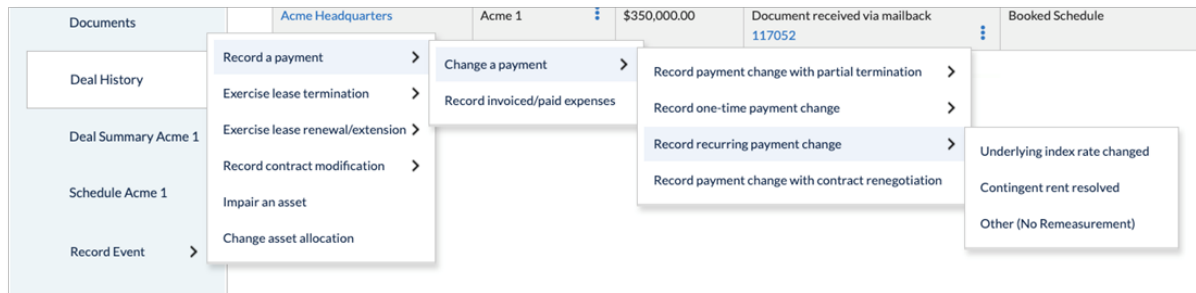
- Payment Adjustments
- Deal Modifications
- Impairments
- Related Expenses

Payment Adjustments

Payment Adjustments may be captured for an existing deal two ways:

- Through the User Interface in Deal Summary
- Using the Bulk Import function

To capture a payment adjustment through the UI, search for a deal using the deal number and Top Search Bar. Once in the deal, hover over **Record Event** in the Left NavBar. Next hover over **Record a payment**, then **Change a payment**. From this layer of the menu, there are different options, depending on what the timing of the adjustment is and the reason for the adjustment. By selecting any of the options, you'll be taken to the Record Payment Adjustment Workspace and some fields will be pre-populated based on the selection in the Record Event menu.



Record Payment Adjustment
Adjust Payment

Apply to all payments on or after the adjustment date:
☒

Change payment amount, starting:*
Jul 15 2022

Scheduled Payment Amount:

New Payment Amount:*
USD

Reason For Change:*
Underlying index rate changed

Remeasurement Date (IFRS 16 only):*
July 2022

Underlying Rate:
Not Set

Previous Index Rate:
%

New Index Rate:*
%

Comments:

*Required
Save Payment Adjustment

The reason code used determines if that lease will be remeasured or not when you make that adjustment. If you are expecting a remeasurement for ASC 842, the only time that will happen is when you have a recurring contingency resolved. All other types will not remeasure. For IFRS 16, remeasurement will occur when you have recurring payment adjustments for either a contingency resolved or a change in the underlying index.

This, along with the accounting standard, determines whether a remeasurement will occur.

	IFRS16		ASC842 & GASB 87	
	Recurring	One-Time	Recurring	One-Time
Change in Underlying Index	✓	✗	✗	✗
Contingency Resolved	✓	✗	✓	✗
Other	✗*	✗	✗*	✗

Note: Never enter Change in Underlying Index as one-time, as that scenario would not exist.

* This is non-GAAP and IFRS; customers should be careful when selecting this option.

Follow the steps below to record a payment adjustment:

Step	Action: Record Payment Adjustment
1	Search for deal using the Top Search Bar and Deal #.
2	Hover over the Record Event menu in the Left NavBar.
3	Hover over Record a payment , then Change a payment .

Step	Action: Record Payment Adjustment
4	Now hover either Record one-time payment change or Record recurring payment change .
5	Select either Underlying index rate change , Contingent rent resolved , or Other , as appropriate, and you will be taken to the Payment Adjustment workspace.
6	Within this workspace, some fields will pre-populate based on the selection you made in the Record Event cascading menu.
7	For Change Payment starting on , change the date from the current date to a valid payment date. You may refer to the payment schedule shown in the workspace to verify that you have indicated a valid payment date.
8	If you have indicated a valid payment date, the Scheduled Payment Amount will appear. If this is blank, check your date as it is not a valid payment date.
9	Next enter the new payment amount. Please note that this is not the change in payment but rather the entire new payment amount. LeaseAccelerator does support one-time negative payment adjustments. To do this, enter - before the amount.
10	If you selected a timing and reason that results in a remeasurement, you will see the Remeasurement Date where you can select the appropriate fiscal period.
11	When all appropriate fields have been populated, click the Save Payment Adjustment button.
12	The lease will be rebooked, and you will need to reload Deal Summary once the booking is complete to see the changed payment in the payment schedule.

To capture a payment adjustment using the Bulk import function, follow the below steps:

Step	Action: Bulk Import Payment Adjustments
1	Download the most recent Portfolio Intake Workbook (PIW) from Ask Alex or the Success Center.
2	Populate the Payment Adjustment tab. See below for an example.
3	Navigate to the Bulk Import workspace from the Left NavBar.
4	Select the Payment Adjustment tile.
5	Click Choose File and select your saved PIW.
6	Click Validate .
7	Review any validation messages and correct as necessary. Remember, yellow warnings will not prevent import but red errors will and those must be addressed before finalizing import.
8	Once all validation messages have been addressed, click Import to finalize.
9	Import was a success when you receive green dots next to the schedule numbers. You may click on any of the schedule numbers to review the deal in greater detail.

For more information on Payment Adjustments, please see the User Guide to Deal Changes.

Deal Modifications

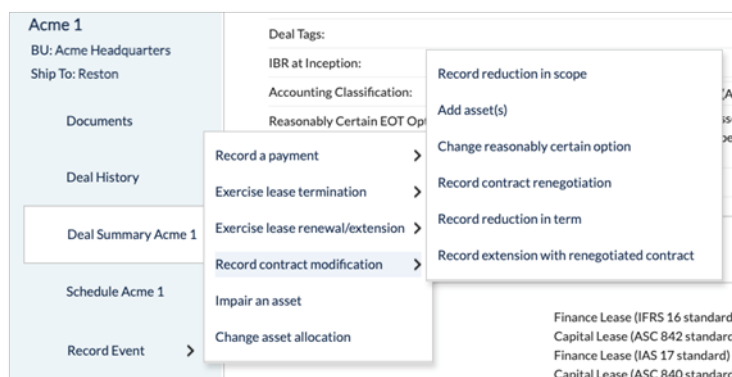
Often times Lessees renegotiate or change the lease terms and conditions which were not contemplated in the original lease agreement. These changes include:

- Change in term (duration)
- Renegotiating payment (not a payment adjustment)
- Adding assets
- Removing assets or reduction in scope
- Changing the reasonably certain EOT option or holding period

LeaseAccelerator provides a way to capture modifications that change the aspects of the deal in ways that require a new deal to be created and have significant accounting implications.

Note: Modifications are contractual changes. Taking actions on an existing lease using existing options (such as a Mid-Term Return) or changes to Payments based on the existing terms of a lease are not Modifications. These types of occurrences are managed through Asset Management, Payment Adjustments, Record Asset Event or Deal Summary.

Modifications may be made to active, renewed or evergreen deals in LeaseAccelerator by selecting the appropriate option in the **Record Event** cascading menu.



For more information on specific modification scenarios and steps to perform a variety of different types of modifications, please see the *User Guide to Deal Modifications*.

Terms Tile

The **Terms** tile outlines the existing terms and allows for renegotiated or modified terms to be entered. If your modification includes changes to any of the terms, populate this tile. Changes may include:

- Periodic Payment Frequency
- Repayment Mode
- Periodic Payment Amount
- Lease Rate Factor

- Duration
- RC EOT Options

Modify Deal

Terms

Add Assets

Remove/Reduce Assets

Summary

Existing Terms:

5 Monthly Payments in Advance
Monthly Fixed Payment Amount: \$50,000.00
Total Monthly Payments (Net of Taxes): \$50,000.00
End-of-Term Purchase Option: FMV
Mid-Term/EOT Options:
Buyout @ End of Term
Terms: Purchase of FMV
Comments: Lessee has the option to purchase the assets at FMV at end of lease.

Return @ End of Term(Reasonably Certain)
Comments: Lessee has the option to return the assets at end of lease.

Renewal @ End of Term at month 37
Terms: payments of FMV until terminated (Evergreen)
Comments: Lessee has the option to renew the assets and end of lease.

Renegotiated (Modified) Terms:

Payment Based On:

Lease Rate Factor

Lease Type:

True/Operating Lease (FMV)

Periodic Payment Frequency:

Monthly

Advance or Arrears:

Advance

Down Payment:

0

Enter LRF by Asset Type

Blended LRF: (e.g. 0.034729)

0.1428571428

of Monthly Payments:

5

Periodic Payment:

Payment Schedule Calculator

Interim Rent:

No interim interest/rent

Mid-Term/EOT Options:

Mid-Term/End-of-Term Options

Remove All Options

Buyout @ End of Term
Terms: Purchase of FMV
Comments: Lessee has the option to purchase the assets at FMV at end of lease.

Return @ End of Term(Reasonably Certain)
Comments: Lessee has the option to return the assets at end of lease.

Renewal @ End of Term at month 37
Terms: payments of FMV until terminated (Evergreen)
Comments: Lessee has the option to renew the assets and end of lease.

Add Assets Tile

If the modification is due to adding new assets (i.e. taking new space in a leased building) during the term of a lease, you can use this tile to modify the deal by adding those assets. By clicking the plus sign, you can enter asset details in the pop-up.



Modify Deal

Terms

Add Assets

Remove/Reduce Assets

Summary

Assets Being Added:

Assets will be available on: Aug 1 2021

Line #	Description	Category	Cost Center	GL Code (Coding Convention)	Quantity	Unit Price	Value
	Product Category: Agriculture and Forestry ☐ Sale/Leaseback Product Number: 0 Manufacturer: Description: Cost Center: GL Code (Coding Convention): Quantity: 1 Unit Price (): Total Price (): 0.00 Unit Rent (): Total Rent (): 0.00 Standalone Observable Price (): Total FMV (): 0.00 ☐ Lease terms are based on utilization Required Add						

Remove/Reduce Assets Tile

Likewise, if the modification requires that assets are removed or leased space is reduced, you can make those modifications using the **Remove/Reduce Assets** tile.

Modify Deal

Terms

Add Assets

Remove/Reduce Assets

Summary

Group Assets By:

Schedule #

Show

Active

assets

Assets

Acme 1 (1)

7385-M43 Xeon Server [Asset # 536210]

Summary of Selected Assets and Cost Allocation:

0 active, 0 terminated, 0 disposed selected

0 assets selected, with an aggregate cost basis of

Percent

Cost Center

GL Code (Coding Convention)

Asset Event:

Reduce Scope

Comments :

Percent Reduction :

%

Required

Summary Tile

The **Summary** tile shows lease details **Before Modification** and **After Modification** to illustrate the effect of any changes. Before recording the modification, verify that all the data is accurate. Once you've verified all data and input necessary RCHP, indicate the **Date of Modification**, which will be the Lease Start Date of the new modified deal. Click **Record Modification** to submit the changes and create the modified deal.

Modify Deal

Terms

Add Assets

Remove/Reduce Assets

Summary

Before Modification:

Terms:

5 Monthly Payments in Advance
Monthly Fixed Payment Amount: \$50,000.00
Total Monthly Payments (Net of Taxes): \$50,000.00
End of Term Purchase Option: FMV
Mid Term/EOT Options:
Buyout @ End of Term
Terms: Purchase of FMV
Comments: Lessee has the option to purchase the assets at FMV at end of lease.

Return @ End of Term(Reasonably Certain)
Comments: Lessee has the option to return the assets at end of lease.

Renewal @ End of Term at month 37
Terms: payments of FMV until terminated (Evergreen)
Comments: Lessee has the option to renew the assets and end of lease.

IER:

7 %

Reasonably Certain EOT Option:

Return @ month 36; lessee must provide notice of intent to exercise at least 90 days before EOT; Lessee has the option to return the assets at end of lease.

Reasonably Certain Holding Period:

36

Estimated Guaranteed Residual Value (GRV):

USD

After Modification:

Terms:

5 Monthly Payments in Advance
Monthly Fixed Payment Amount: \$50,000.00
Total Monthly Payments (Net of Taxes): \$50,000.00
End of Term Purchase Option: FMV
Mid Term/EOT Options:
Buyout @ End of Term
Terms: Purchase of FMV
Comments: Lessee has the option to purchase the assets at FMV at end of lease.

Return @ End of Term(Reasonably Certain)
Comments: Lessee has the option to return the assets at end of lease.

Renewal @ End of Term at month 37
Terms: payments of FMV until terminated (Evergreen)
Comments: Lessee has the option to renew the assets and end of lease.

IER:

1.045813 %

Reasonably Certain EOT Option:

Renewal @ End of Term at month 37

Reasonably Certain Holding Period:

Estimated Guaranteed Residual Value (GRV):

USD

Assets Removed/Reduced Effective 06/12/2021:

Line #	Description	Category	Cost Center	GL Code (Coding Convention)	Quantity	Unit Price	Value
Total Price:							

Assets Added Effective 8/1/2021:

Line #	Description	Category	Cost Center	GL Code (Coding Convention)	Quantity	Unit Price	Value
Total Price:							

Date of modification:

Aug 12 2021

Comments:

Record Modification

Once the modification has been recorded, a new deal will be created. The original deal will not terminate until the new, modified deal has been classified and booked.

A new Schedule will be created reflecting the modifications to this deal. This deal, under its current terms, will continue to be reflected on reporting until the new Schedule is classified and booked

Ok

Cancel

You will then be prompted to perform an accounting classification for the new deal.

Accounting Classification Analysis

Summary of Tests

All classification tests will be performed for all standards by default.

ASC 840		IAS 17		ASC 842		IFRS 16	
Materiality Threshold:	No	Materiality Threshold:	No	Materiality Threshold:	No	Materiality Threshold:	No
Short Term Lease:	No	Short Term Lease:	No	Short Term Lease:	No	Short Term Lease:	No
Cancellable:	No	Cancellable:	No	Cancellable:	No	Cancellable:	No
90% of Lease Payments:	No	PV of Lease Payments:	No	PV of Lease Payments:	No	Ownership Transfer:	No
75% of Economic Life:	No	75% of Economic Life:	No	Economic Life:	No	Interrelated Assets:	No
Ownership Transfer:	No	Ownership Transfer:	No	Ownership Transfer:	No	Small Value:	No
Bargain Purchase:	No	Bargain Purchase:	No	Likely Purchase:	No	Classification:	Finance
Classification:	Operating	Specialized Assets:	No	Specialized Assets:	No		
		Classification:	Operating	Classification:	Capitalized-Operating		

Reclassify Effective: January 2020 (Commencement Date)

Refresh Classification

Classification results are displayed based on the last analysis performed and saved, this is what is used by the accounting engine and reports. If you would like to refresh the results click on the Refresh Classification button and then on the Save Accounting Classification button to apply refreshed classification to accounting calculations.

Analysis by Category

Deal Characteristics

Save Accounting Classification

Next you will need to book the new deal. Within the Deal History workspace, on the Next Steps tile, you'll see a To-Do to **Book** the modified deal.

Deal History

Next Steps
History
Documents
E-mails
Q & A
Related Deals

Add To-Do

Event Type:

Label Button As:

Description:

For:

Participant Role:

Assign To:

Save

BU	Lease Schedule #	Value	Affected Document	Status	Pending Actions	Responsible Party
Acme Headquarters	Acme 512-M001	\$700,000.00	Lease Schedule Acme 512-M001	Waiting for Lessor to provide Schedule	Book	Order Administrator

Click the **Book** button and populate appropriate fields in the Book Deal workspace.



Note: When booking the modified deal, be sure to book to the same ledgers as the original deal.

Your new deal is now booked and the modification has been captured. A deal relationship will be created between the newly modified deal and the original deal. This deal relationship may be viewed in both Deal History and Deal Summary workspaces on the Related Deals tile.

For more information about Deal Modifications, please see the [User Guide to Deal Modifications](#), available in Ask Alex or the Success Center.

Impairments

Per FASB guidance, long-lived assets and certain identifiable intangibles held and used by an entity are to be reviewed for impairment whenever events or changes in circumstances indicate that the carrying amount of an asset may not be recoverable. If an impairment is appropriate, you can record either a full or partial impairment on one or more assets in the user interface using the Record Asset Event workspace.

Record Asset Event

Group Assets By:

Schedule #

Assets

Acme 1 (1)

Summary of Selected Assets and Cost Allocation:

1 active, 0 terminated, 0 disposed selected

1 assets selected, with an aggregate cost basis of \$350,000.00

Percent	Cost Center	GL Code (Coding Convention)
100.00%	Acme03	IT

Export

1 asset selected for Impairment
Current payment: \$50,000.00

Asset Event:

Impairment

Impairment Date:

Sep 1 2021

Ledger Date:

August 2021 or later

Fiscal period in which the postdated event is being recorded

Comments:

Impairment Amount:

USD

Required

Save

Follow the steps below to record an Impairment:

Step	Action: Record Asset Event
1	Search for the deal using the Top Search Bar and Deal #.
2	Hover over Record Event in the Left NavBar and select Record asset impairment from the first menu layer.

Step	Action: Record Asset Event
3	This will take you to the Record Asset Event workspace where all assets are checked by default. You can uncheck any assets as necessary.
4	Impairment is pre-populated in the Asset Event drop-down.
5	Change Ledger Date to appropriate date.
6	Change Impairment Date to appropriate date. This should be the last day of the fiscal month before the impairment takes effect or the first day of the fiscal month in which you want impairment to take effect.
7	Enter any relevant comments related to the impairment.
8	Enter the impairment amount. The impairment amount must be less than or equal to the net book value of the selected asset. If it is greater, you will get a pop-up warning indicating the maximum value that may be used.
9	Click Save .

For more information on Impairments, please see our *User Guide to Impairments*, available in Ask Alex and the Success Center.

Impairment Loss Reversal

According to ASC 840 and ASC 842, once an asset is impaired, it will always be impaired and cannot be reversed. However, under IAS 17 or IFRS 16, you may reverse an impairment after you have reviewed and tested the asset in much the same way as when you initially impaired it.

You may reverse an asset impairment loss in the user interface within the Record Asset Event workspace.

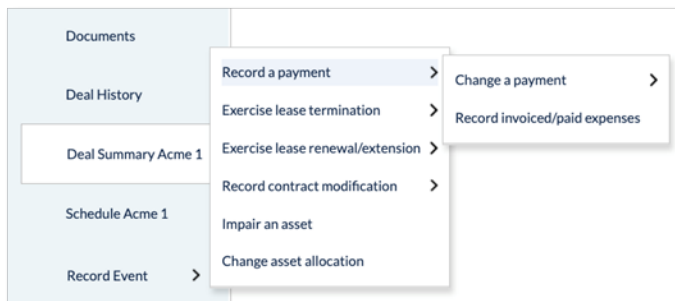
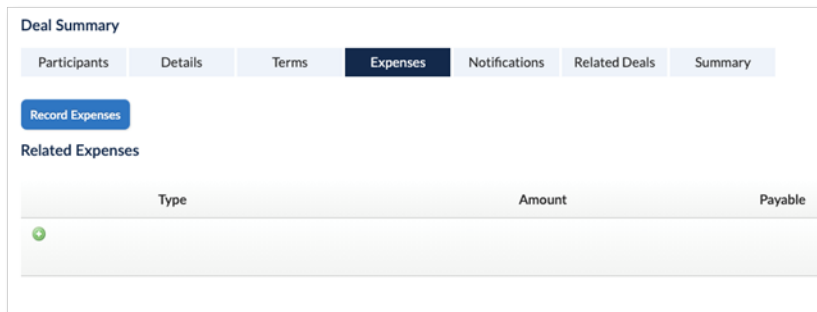
Follow the steps below to record an Impairment Loss Reversal:

Step	Action: Record Asset Event
1	Search for the deal using the Top Search Bar and Deal #.
2	Hover over Record Event in the Left NavBar and select Reverse asset impairment loss from the first menu layer.
3	This will take you to the Record Asset Event workspace where none of the assets are checked by default. Any impaired assets will be indicated. You may only check one asset at a time.
4	<i>Impairment Loss Reversal</i> is pre-populated in the Asset Event drop-down.
5	Change <i>Impairment Loss Reversal Date</i> to appropriate date.
6	Verify the <i>Ledger Date</i> , change as necessary. This drop-down is limited by the Impairment Loss Reversal Date and open periods.
7	Enter any relevant comments related to the impairment loss reversal.
8	Enter the Impairment Loss Reversal Amount. Note: <i>It is up to the customer to determine the maximum impairment loss reversal amount, LeaseAccelerator does not calculate this or alert you if you enter an amount greater than the maximum allowed.</i>
9	Click Save .

For more information on Impairments, please see our [User Guide to Impairments](#), available in Ask Alex and the Success Center.

Related Expenses

Ancillary expenditures that are required by the lease agreement or that have a direct impact on the accounting for a lease and are incremental to the base rent must be invoiced and/or paid before subsequent entries will be recorded. You may get to the Capture Invoiced/Paid Expenses workspace either from the Expenses tile in Deal Summary and clicking the Record Expenses button or by hovering over **Record Event** in the Left NavBar and **Record a payment**, then selecting **Record invoice/paid expense**.



Capture Invoiced/Paid Expenses

Invoiced Expenses

Paid Expenses

Scheduled Expenses

Type	Amount	Payable	Starting	Payee
LeaseIncentive:Paid to Lessee	\$1,000.00	Monthly	When Invoiced	Acme, Inc.
IDC:Commission	\$1,000.00	Monthly	When Invoiced	A1 Leasing

Invoice History

Date	Amount	Payee	ExpenseType
------	--------	-------	-------------

Enter Invoiced/Paid Expenses

Type:

ARO-End of Life Cost

Last Paid:

ARO Type:

Cost to Dismantle or Remove (per Agreement)

Last Amount:

Description:

% Increase:

Comments:

Payee:

Service Period Start:

Aug 12 2021

Service Period End:

Date Paid:

Aug 12 2021

Currency:

United States dollar (USD)

Amount:

Paid/Received:

Paid

Invoice#:

Invoice Date:

Invoice Amount:

Reference #:

Applicable To:

All Assets

Required

Save

Invoiced Expenses Tile

Any expenses that were entered either during schedule entry or from the Expenses tile in Deal Summary will appear on this tile under the Scheduled Expenses. If there have already been expenses that have been invoiced, either through this workspace or by using a bulk import for Invoiced Related Expenses, they will appear in the Invoice History section.

Scheduled Expenses				
Type	Amount	Payable	Starting	Payee
LeaseIncentive:Paid to Lessee	\$15,000.00	One-Time	When Invoiced	Acme, Inc.
CAMS:Garage/Parking	As Invoiced	Monthly	When Invoiced	Rost Leasing, Inc.
Invoice History				
Date	Amount	Payee	ExpenseType	
01/25/2021	\$450.00	A1 Vending	CAMS:Custodial	

To add a new invoice, you may select one of the Scheduled Expenses and fields in the **Enter Invoiced/Paid Expenses** section will auto-populate based on that expense. If you are entering an invoiced expense that isn't listed in the Scheduled Expenses section, you may still enter the invoiced expense information manually.

Enter Invoiced/Paid Expenses

Type:
Common Area Maintenance and Services (CAMS)
Last Paid:
01/01/2021

CAMS Type:
Garage/Parking
Last Amount:
500.00

Description:
250 Spaces
% Increase:

Comments:
Parking Space Fees

Payee:
Rost Leasing, Inc.

Service Period Start:
Jan 1 2021

Service Period End:

Date Paid:
Jan 25 2021

Currency:
United States dollar (USD)

Amount:

Paid/Received:
Paid

Invoice#:

Invoice Date:

Invoice Amount:
500.00

Reference #:

Applicable To:
All Assets

Required

Save

Once complete, click **Save**. The expense will appear in Invoice History if this is an invoiced expense that hasn't been paid yet. If it has been paid, then it will appear on the Paid Expense tile.

Paid Expenses Tile

Any expenses that have been paid will appear in the Payment History section on the Paid Expenses tile. This includes any expenses paid using the user interface or the bulk import for Paid Related Expenses.

Capture Invoiced/Paid Expenses

Invoiced Expenses

Paid Expenses

Payment History

	Date	Amount	Payee	ExpenseType
	02/01/2021	\$1,000.00	A1 Leasing	IDC:Commission

If an expense was paid by mistake or you need to delete a payment in an open period, you may click the trash can icon to delete the expense. If no trash can icon appears, then that expense was paid in a closed period and cannot be deleted.

Advanced Search Experience

The search experience has been updated across all pages. This guide covers the redesigned search bar, the Advanced Search form, and the updated search results for Deals, People, Companies, and Addresses. Assets Advanced Search is unchanged.

Search Bar

The search bar appears at the top of every page. In the **Search For** dropdown, you select Deals, People, Companies, or Assets. Address records are not a separate Search For option; you reach them through the **Type of Contact** dropdown within a People or Companies search.

The elements are as follows:

Element	Description	New
Search For	Select the type of record to search for: Deals, People, Companies, or Assets. Address records are reached through the Type of Contact dropdown within a People or Companies search.	
By	Select the field to search by. Options change based on the Search For selection.	
Recent Searches	An option in the By dropdown. When selected, the search field becomes a list of your previous searches. Click any item to run that search immediately.	New
Search input field	Enter your search term. Press Enter or click the magnifying glass icon to run the search.	
Magnifying glass icon	Click to run the search. This replaces the previous Search button.	New
Sliders Icon	Click to access the Advanced Search form for more detailed filtering options. Previously represented as text; now shown as a sliders icon.	New

Advanced Search Form

The Advanced Search form appears below the search bar in an accordion labeled **Advanced search**.

LeaseAccelerator
Search For Deals By Document # Search Advanced Search LA

Search for Deals

Advanced search

Document Type Number Deal Status

Date Range to

Participant Role Name Company Name City

State/Province Country Phone E-mail Address

Deal Id Deal Tag Maximum number of records to retrieve

(Multiple fields will be searched with 'and' logic.) Search

Search for Deals

Advanced search

Search Results

After running a search, results appear below the collapsed Advanced Search form.

Accordion Behavior (NEW)

- The form is expanded by default when you navigate directly to the advanced search page without entering anything in the search field.
- The form is collapsed if you run a search from the search bar that returns multiple results.
- Click the **Advanced search** accordion header to expand or collapse the form at any time.

Deals

When Deals is selected in the **Search For** dropdown, the Advanced Search form shows Deals-specific search criteria. Fill in as many or as few fields as needed. If you fill in more than one field, a record must match all of them to appear in your results (AND logic).

Search for Deals

9 deals retrieved out of 9 deals that matched your criteria.

Advanced search

Evergreen Terminated/Disposed Pin results

Deal #	BU	Ship To	Value	Lease Start Date	Term (mos.)	Status	Deal Tag	Actions
LA9501-2	Acme Headquarters	Reston	\$5,000,000.00	01/01/2018	60	Evergreen		Q
LA9501-4	Acme Headquarters	Reston	\$5,000,000.00	01/01/2018	60	Evergreen		Q
LA9501-5	Acme Headquarters	Reston	\$5,000,000.00	01/01/2018	60	Evergreen		Q
LA9501-1	Acme Headquarters	Reston	\$5,000,000.00	01/01/2018	60	Evergreen		Q
LA9501-3	Acme Headquarters	Reston	\$5,000,000.00	01/01/2018	60	Evergreen		Q

Search for Deals

9 deals retrieved out of 9 deals that matched your criteria.

Advanced search

Document Type: Number: Deal Status:

Date Range: to:

Participant Role: Name: Company Name: City:

State/Province: Country: Phone: E-mail Address:

Deal Id: Deal Tag: Maximum number of records to retrieve:

(Multiple fields will be searched with 'and' logic.)

Deal #	BU	Ship To	Value	Lease Start Date	Term (mos.)	Status	Deal Tag	Actions
LA8501-2	Acme Headquarters	Reston	\$5,000,000.00	01/01/2018	60	Evergreen		Q

People, Companies, and Addresses

When **People** or **Companies** is selected, the Advanced Search form shows the Contacts search. Use the **Type of Contact** dropdown to switch between People, Companies, and Addresses. The form fields update based on the Type of Contact you select.

Search for Contacts

Advanced search

Type of Contact

People

People

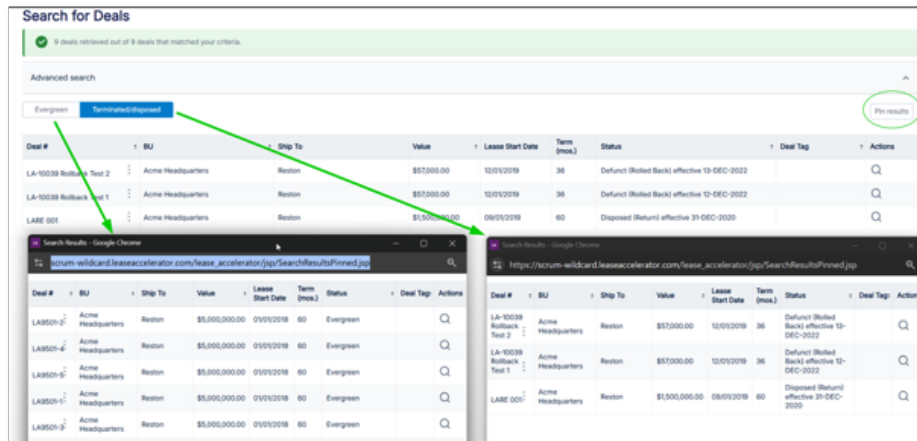
Companies

Addresses

Status Tabs (Deals)

Deals results are organized into tabs by deal status. The tabs displayed depend on which statuses appear in your results. Only statuses with matching records are shown. Examples include Active, Evergreen, Incomplete, Pre-origination, Renewed, and Terminated/disposed.

Click a tab to view records in that status. Your search criteria are preserved as you switch between tabs.



Results Table

The results table has been updated with the following features.

Feature	What changed
Actions Column	Moved from the far left to the far right of the table. Now labeled Actions. The column can contain multiple icons depending on the record.
Magnifying glass icon	Appears in the Actions column. Opens the deal history for that record.
Related Deal Icon	Appears in the Actions column where applicable. Not all deals include this icon.
Kebab menu (Deals)	Remains in its original position to the right of the deal number. Not moved to the Actions column.

Deal #	BU	Ship To	Value	Rental	Lease Start Date	Term (mos.)	Status	Deal Tag	Actions
DemoLVB	1215 Smoke Test	Arlington	\$4,000.00	\$400.00	02/09/2026	36	Active		Q
Lease 45644-M001	Manufacturing	jones	\$50,000.00	\$1,250.00	01/01/2026	20	Active		Q S
TestBhavyaLVB-RFP	1215 Smoke Test	Arlington	\$1,100.00	\$550.00	01/21/2026	40	Active		Q

Pin Results (NEW)

The **Pin Results** button is located above and to the right of the results table and replaces the pushpin icon that used to be on the top left. Each status tab can be pinned separately. Clicking it opens that tab's results in a new window, preserving your current filters and sort order.



Contact Results

People, Companies, and Addresses results follow the same table structure. The Actions column has moved to the far right of the table. Each record type displays relevant fields appropriate to that contact type (Name/Company Name, address information, contact information, and role).

Search for Contacts

Advanced search

3 contacts retrieved out of 3 contacts that matched your criteria.

Line #	☐	Name	Company name	Email address	Phone	Fax	Ledger codes	Actions
1	☐	User 01	LeaseAccelerator Services	psurve@leaseaccelerator.com				
2	☐	User 02	LeaseAccelerator Services	psurve@leaseaccelerator.com				
3	☐	User 03	LeaseAccelerator Services	psurve@leaseaccelerator.com				

Merge To

Version Summary

Version	Changes/Updates	Date
21R1	Created Version Summary Revised to include enhancements to UI including Asset Management Added sections for Impairments and Related Expenses	01/27/2021
21R1.1	Updated screenshots	04/19/2021
21R3	Updated screenshots, removed Asset Mgmt to put in separate guide, updated references to other user guides, updated steps to incorporate Record Event cascading menu.	08/12/2021
22R1	Updated verbiage.	01/05/2022
22R3	Updated verbiage and screenshots for classification.	07/15/2022
23R2	Updated label for Record asset impairment in Record Event cascading menu.	05/12/2023