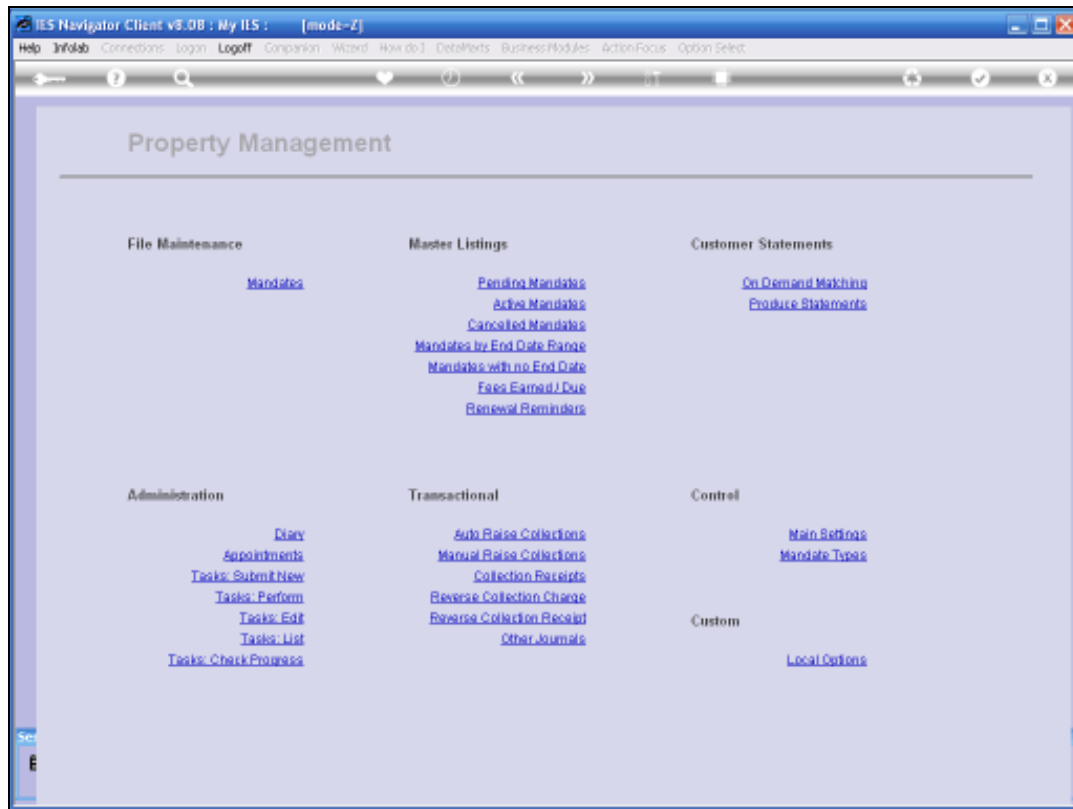Slide 1

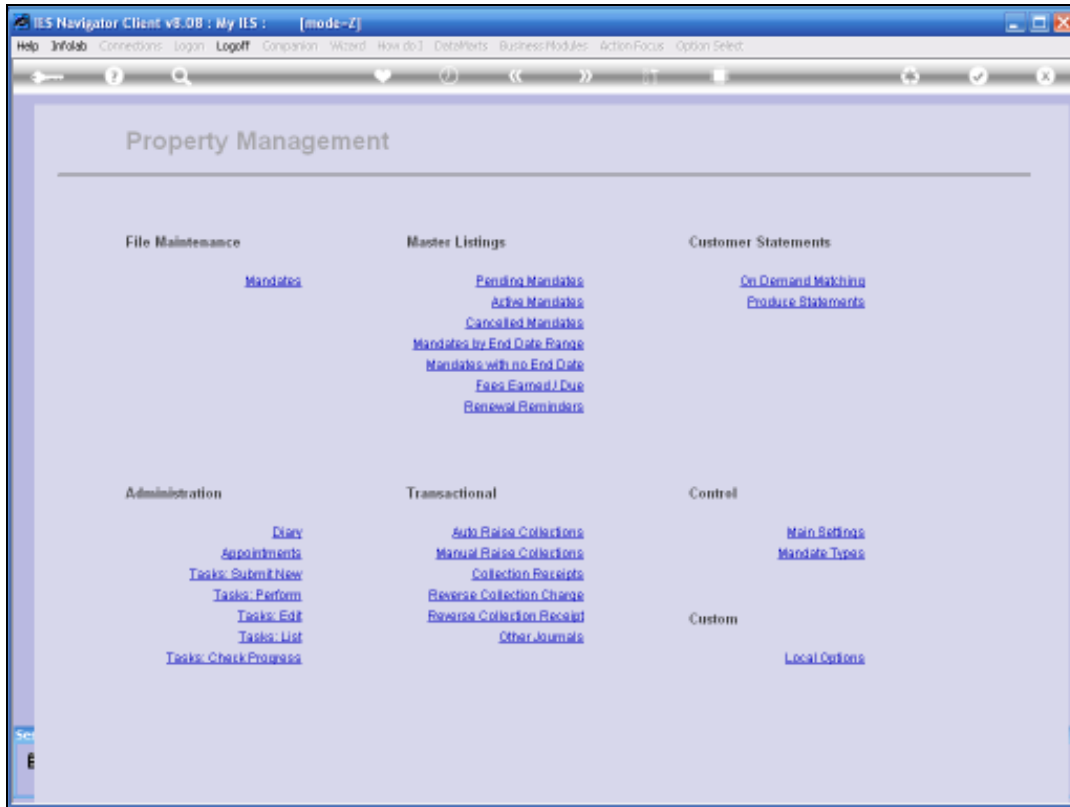In this session we take a look at the Property Management Reports.

Slide 2

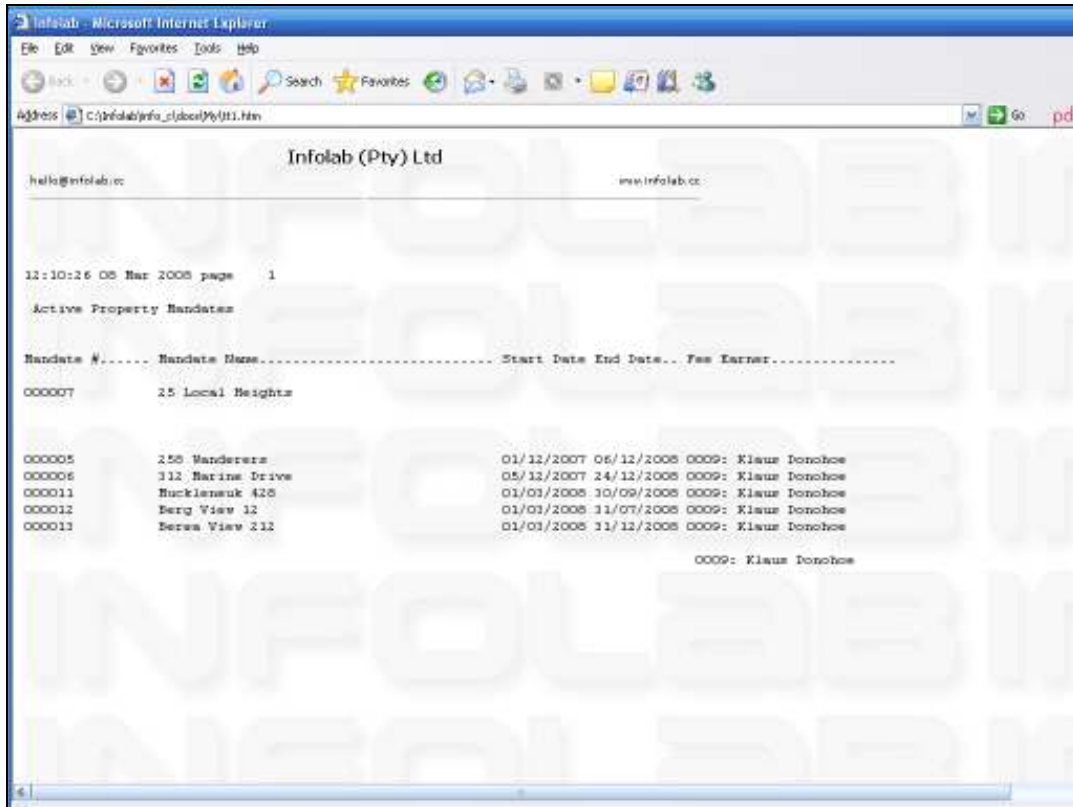The "Pending Mandate" Option will give us a List of Mandates that are in the Pending State.

The "Cancelled Mandates" will give us a List of Mandates that have been Cancelled.

The "Active Mandates" gives us a List of the Mandates that are currently Active.

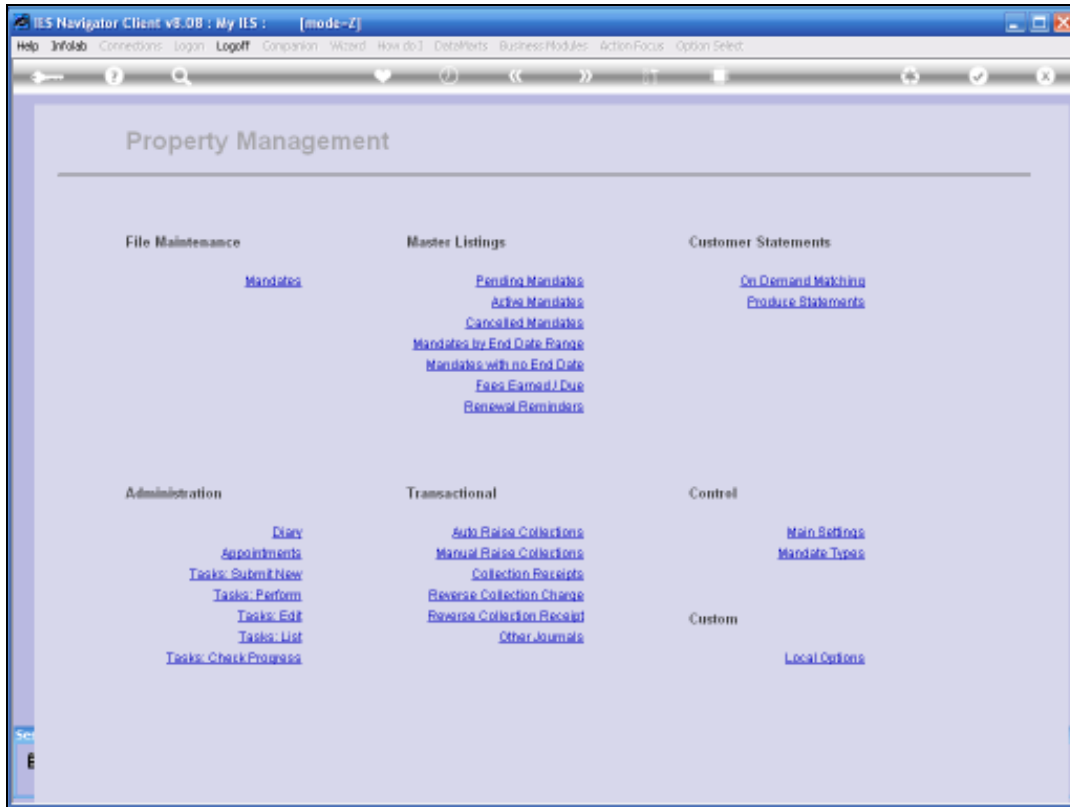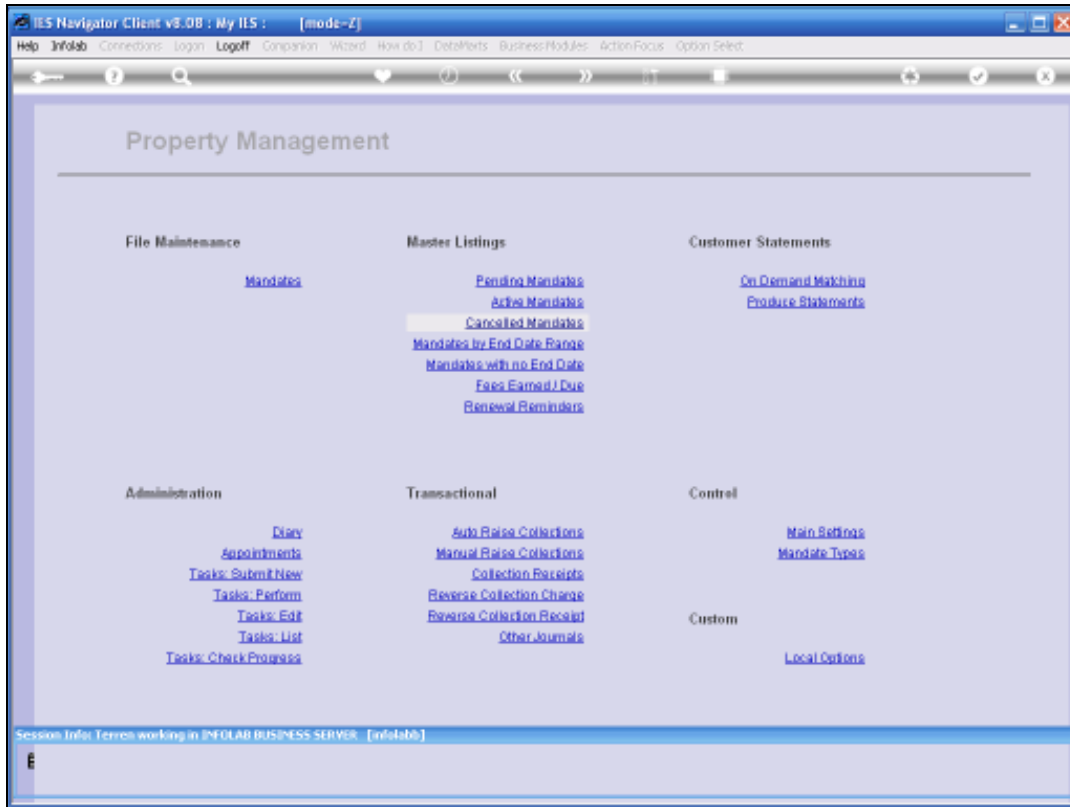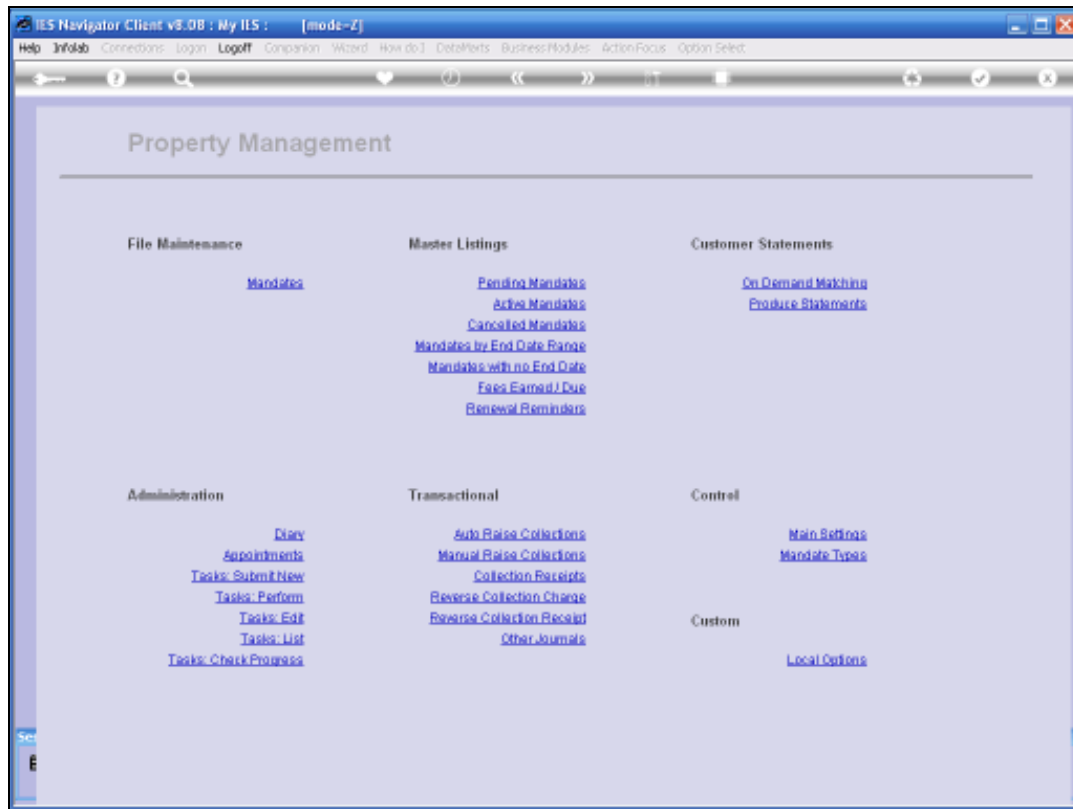We will take a look at this particular Option.

Slide 3

Slide 4

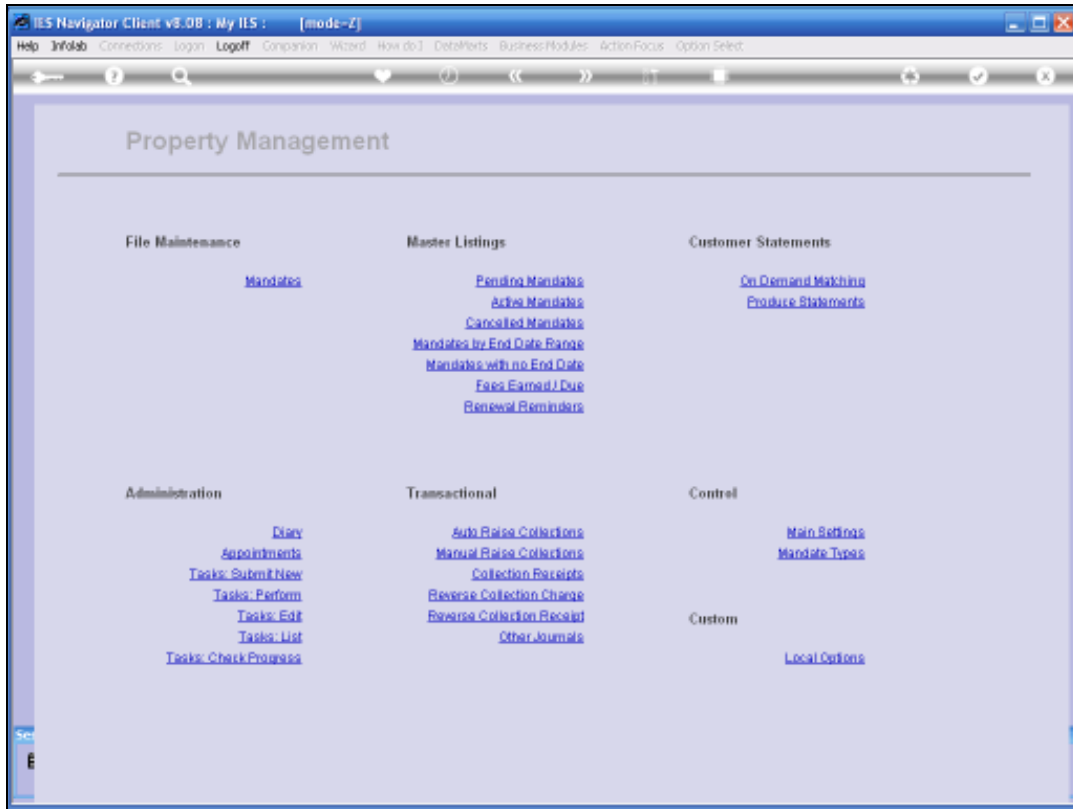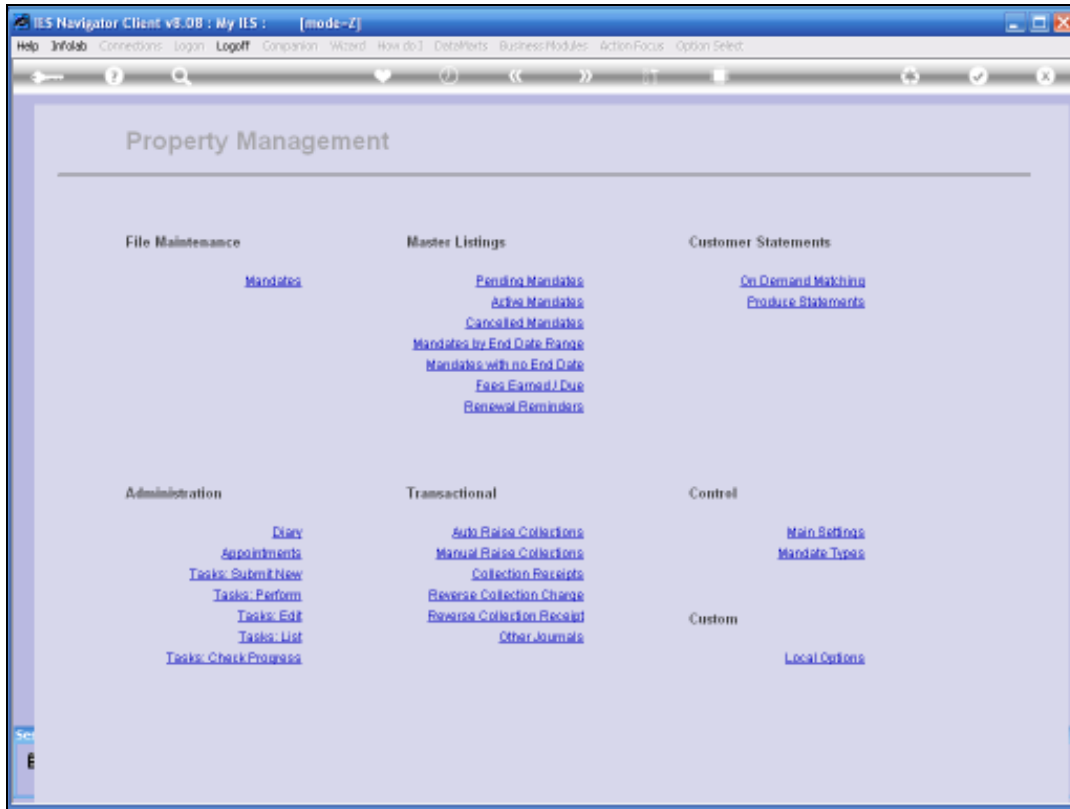The Mandates are sorted by Fee Earner.

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Slide 7

We also have Options to List "Mandates by End Date Range". In other words all Mandates that will come to an End in the specified Date Range.
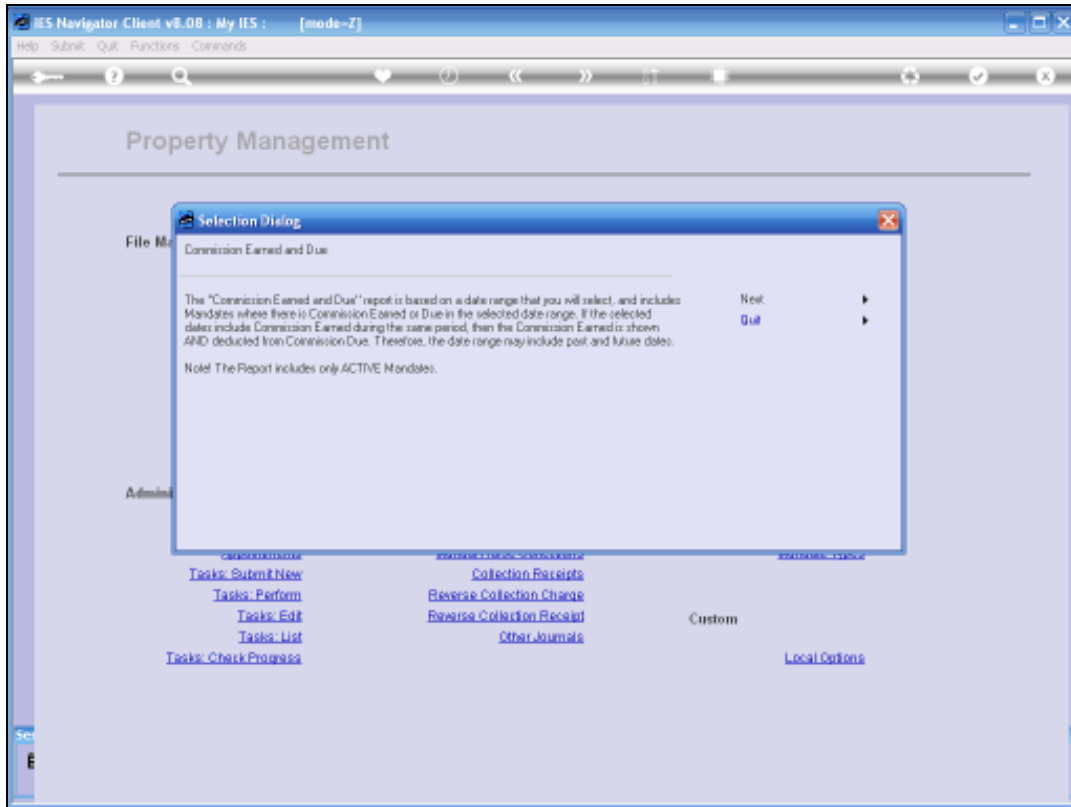
We also have an Option to List "Mandates with no End Date", i.e. Open-ended Mandates.

Then the next example that we will look at, is the Option for "Fees Earned/Due"
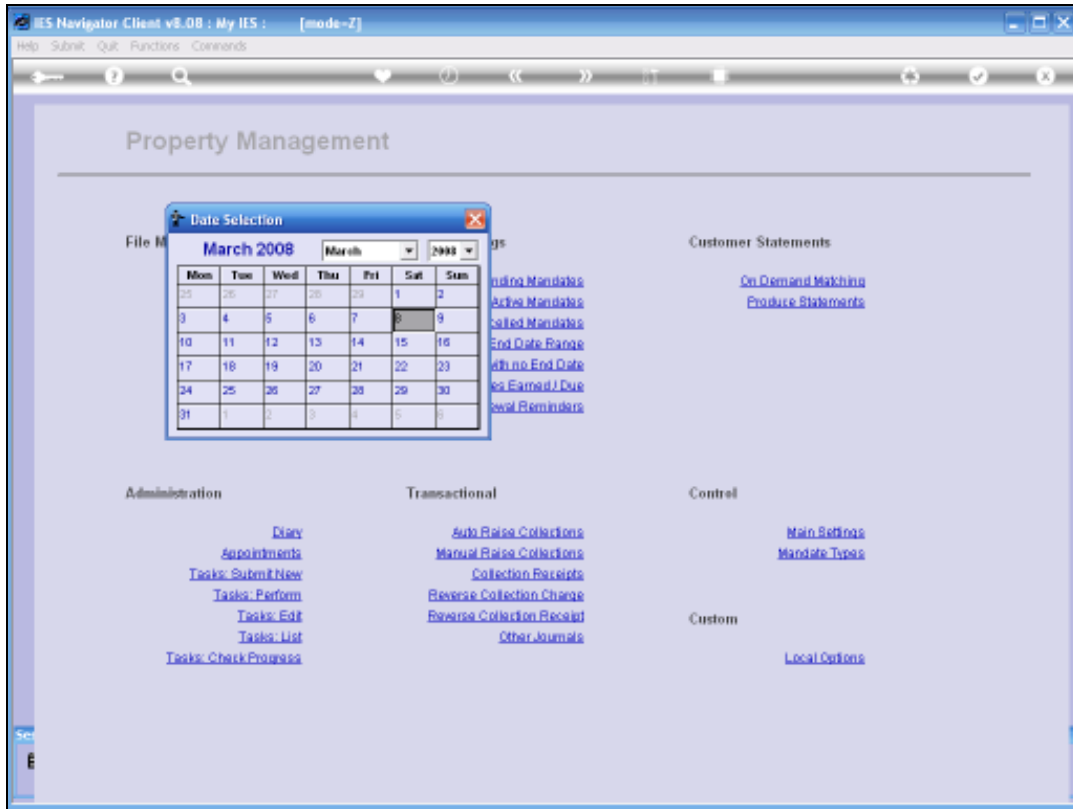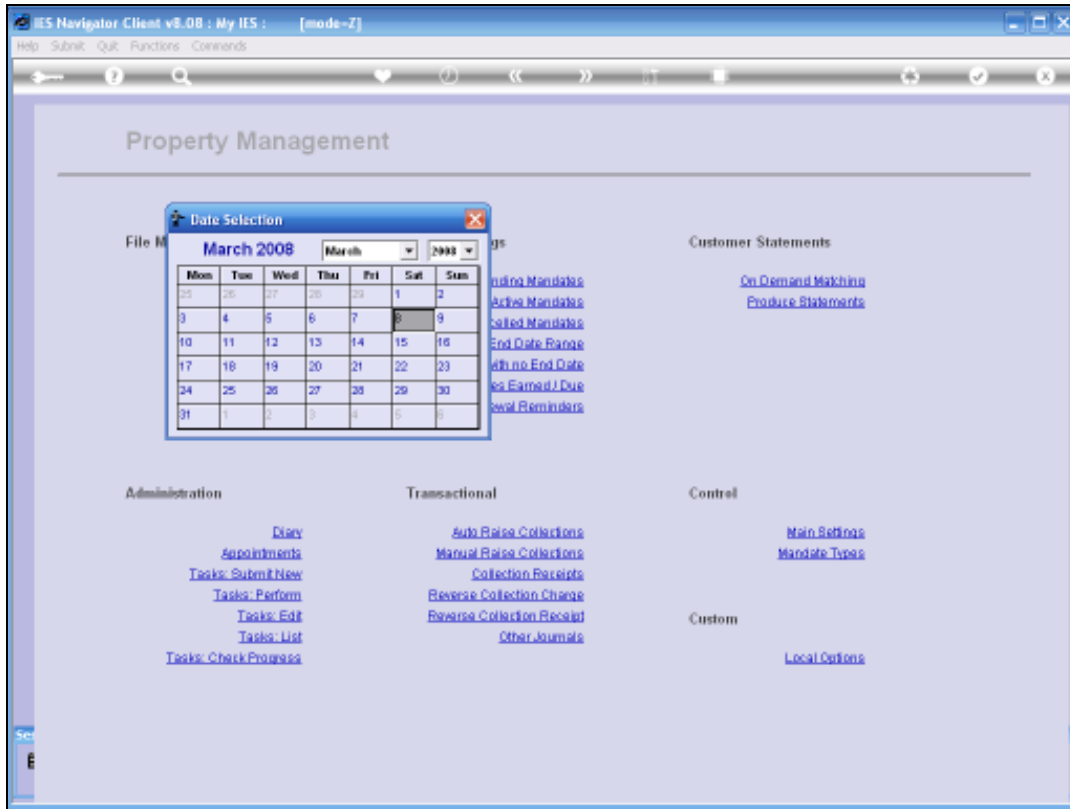
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Slide 10

This Report is based on a Date Range that we will select i.e. a Start Date and an End Date for the Period in the Date Selection that is already Past.
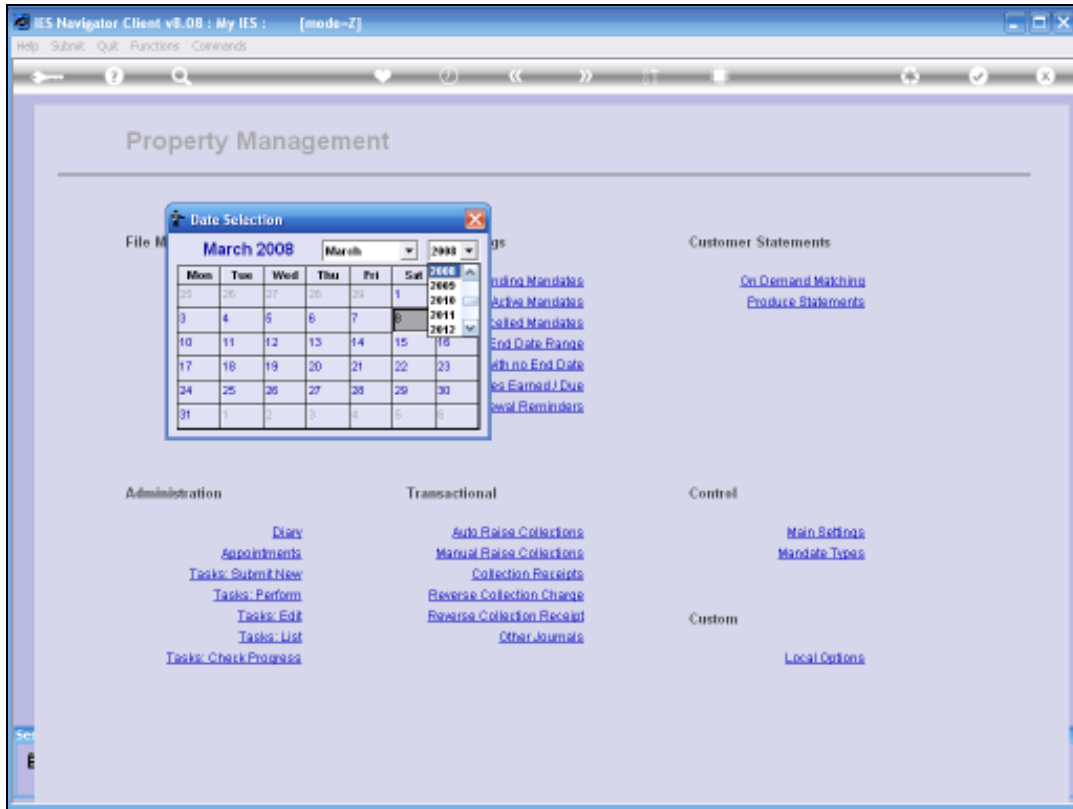
The System will Report Commissions already earned, and for the Period still remaining in the Selected Date Range, the System will show the Commission that is expected to be earned during that Period.
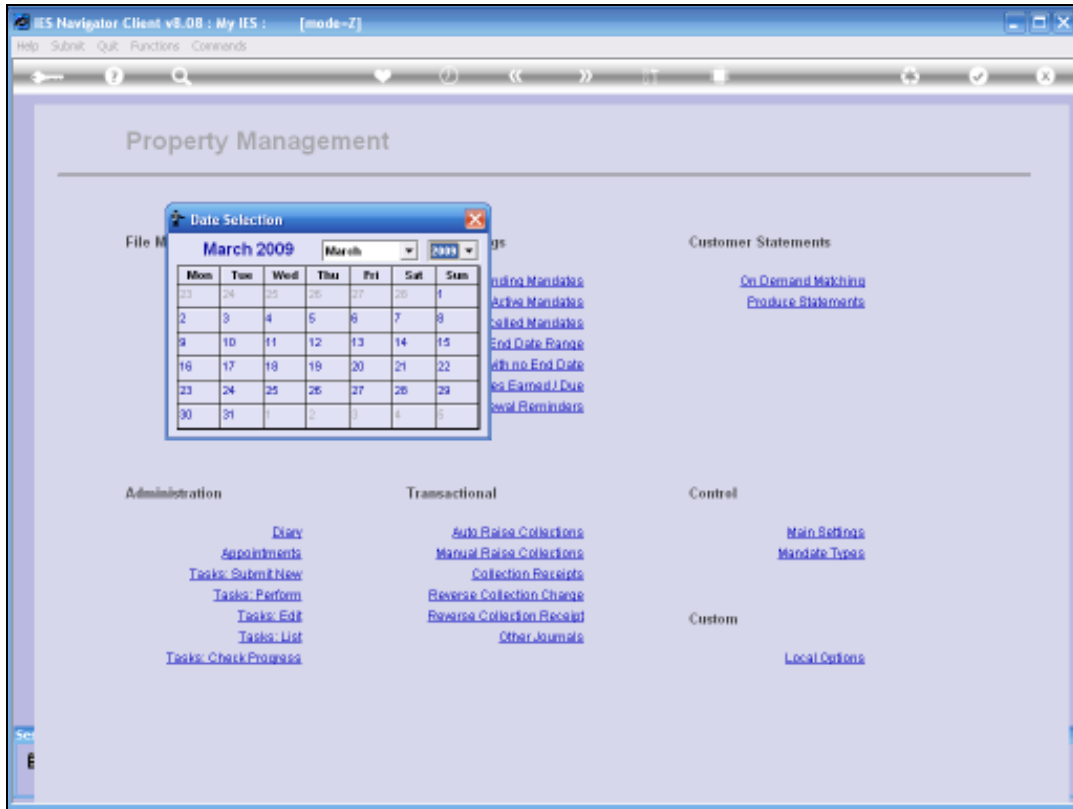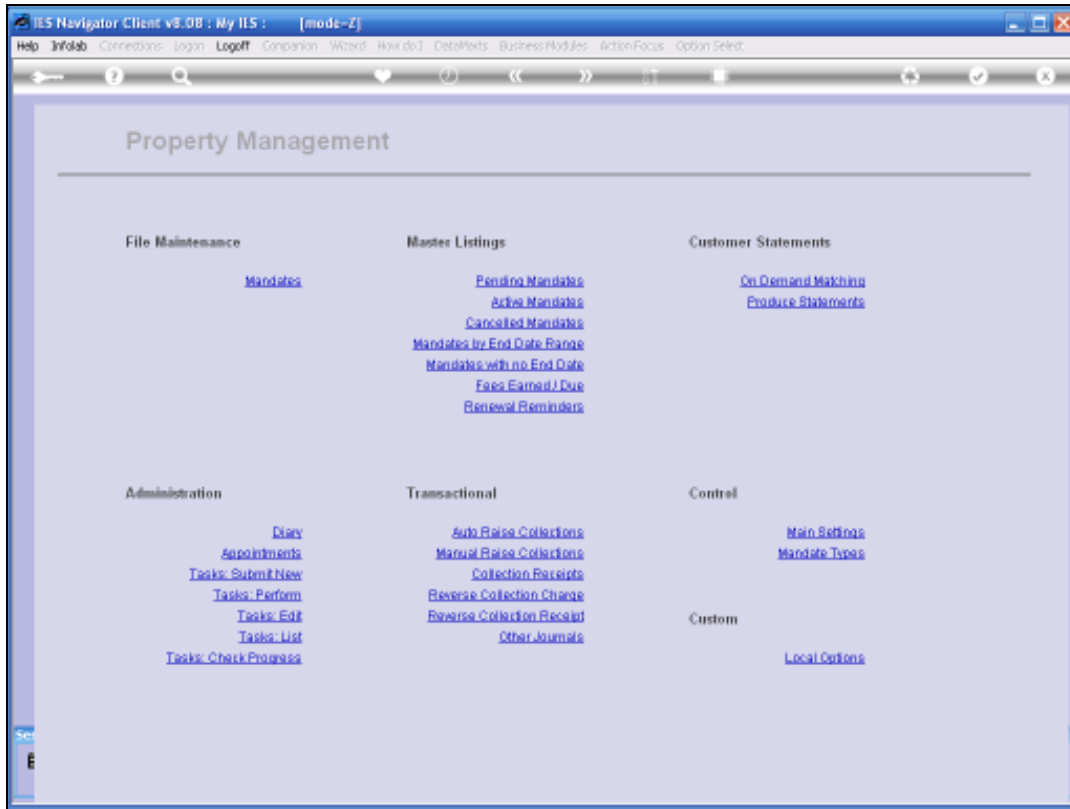
Slide 11

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Slide 14

Slide 15

And here we have an example of Commission Earned and Commission Due by Mandate.

Slide 16

The "Reminders Report" will list for us all Mandates where we have a Reminder Date specified in the Selected Date Range.