

Using the Leases Screen



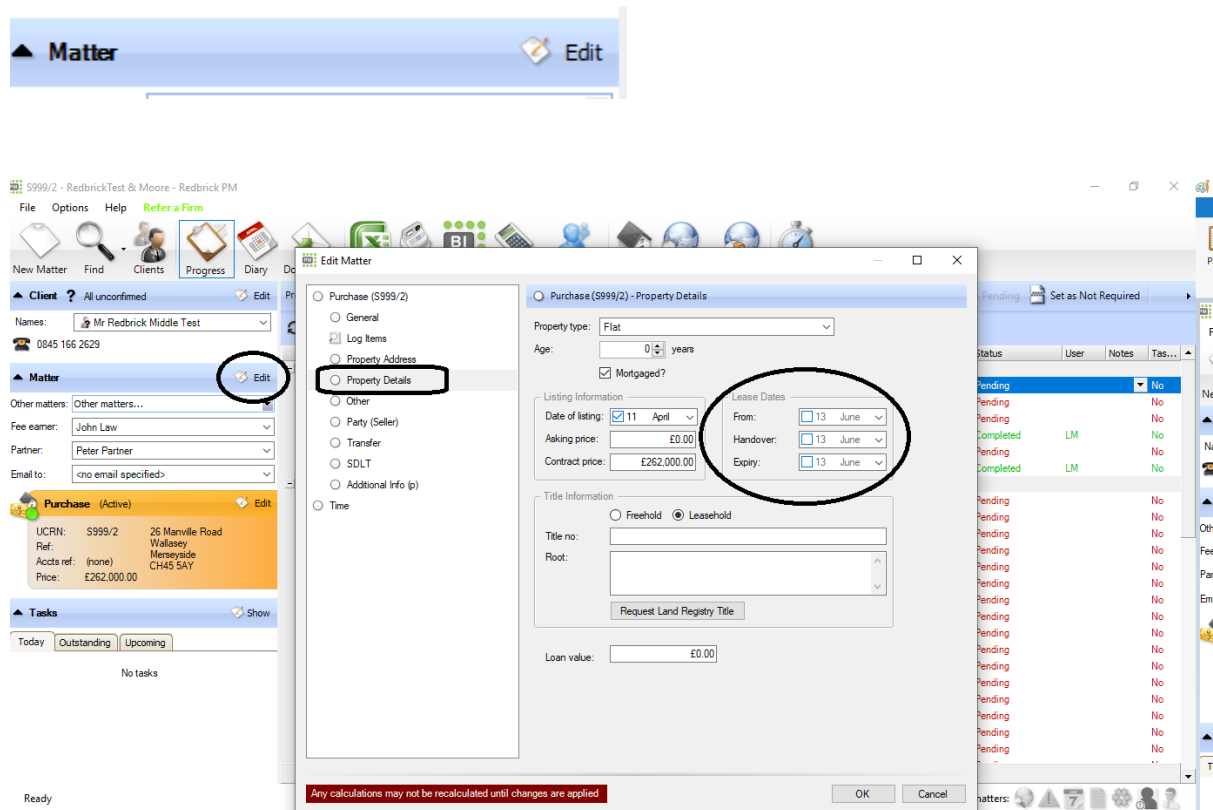
Redbrick
Practice Management

Legal Case Management

Leasehold information – Apportionment calculations

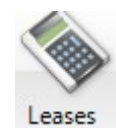
The Leases Screen can be used to work out various apportionments such as Ground Rent or Service Charges.

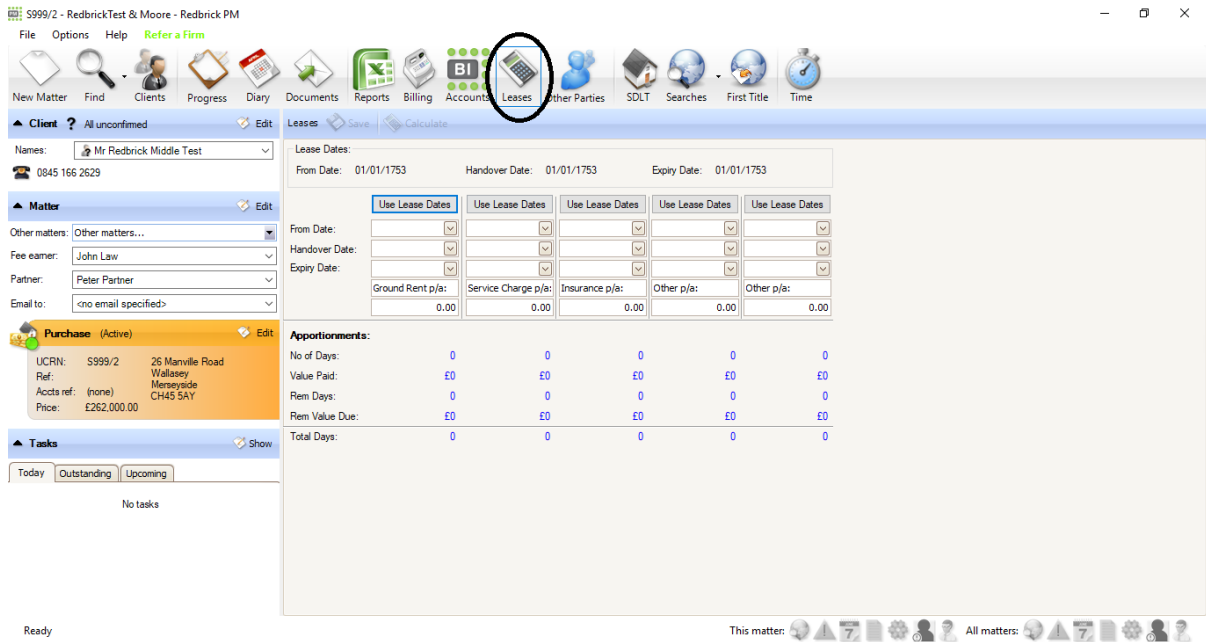
The lease dates can be added in the Edit Matter area under Property Details, Lease dates for a Purchase.



The screenshot shows the 'Edit Matter' window for a purchase. The 'Property Details' tab is selected, and the 'Lease Dates' section is highlighted with a red circle. The 'Lease Dates' section includes fields for 'From', 'Handover', and 'Expiry', all set to 13 June. The 'Purchase' tab is also visible, showing details like 'Mr Redbrick Middle Test' and '£262,000.00'.

Or, they can be added into the Leases Screen by clicking on the Leases button.





Client: All unconfirmed

Names: Mr Redbrick Middle Test

0845 166 2629

Matter: Other matters...

Fee earner: John Law

Partner: Peter Partner

Email to: <no email specified>

Purchase (Active)

UCRN: S999/2 26 Marville Road
Ref: Wallacey Merseyside CH45 5AY
Accts ref: (none)
Price: £262,000.00

Tasks: No tasks

Leases: Save Calculate

Lease Dates: From Date: 01/01/1753 Handover Date: 01/01/1753 Expiry Date: 01/01/1753

| | Use Lease Dates | Use Lease Dates | Use Lease Dates | Use Lease Dates | Use Lease Dates |
|---------------------|-----------------|-----------------|-----------------|-----------------|-----------------|
| From Date: | | | | | |
| Handover Date: | | | | | |
| Expiry Date: | | | | | |
| Ground Rent p/a: | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| Service Charge p/a: | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| Insurance p/a: | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| Other p/a: | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |

Apportionments:

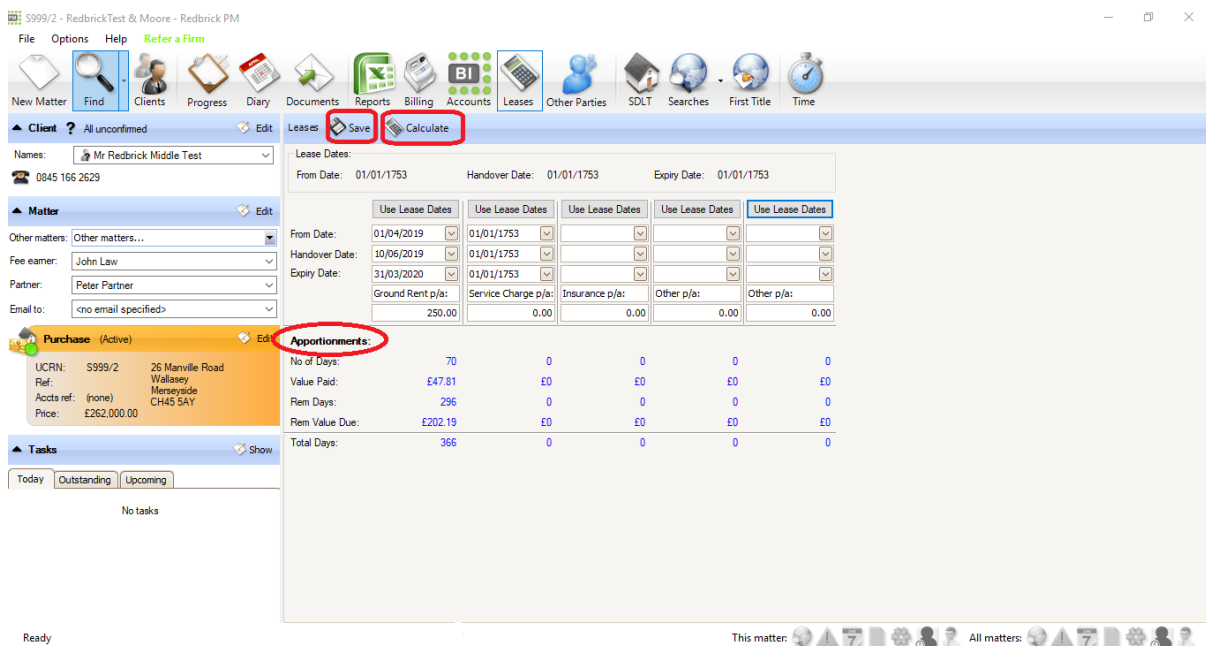
| | | | | | |
|----------------|----|----|----|----|----|
| No of Days: | 0 | 0 | 0 | 0 | 0 |
| Value Paid: | £0 | £0 | £0 | £0 | £0 |
| Rem Days: | 0 | 0 | 0 | 0 | 0 |
| Rem Value Due: | £0 | £0 | £0 | £0 | £0 |
| Total Days: | 0 | 0 | 0 | 0 | 0 |

Ground Rent, Service Charge and Insurance are automatically selected in the first 3 areas. You can use these areas for any apportionments so the name can be typed over. You can also use the last two areas for anything aswell, just type in the name.

For each of the areas you need to make apportionment calculations on, fill in the From Date, Handover Date, Expiry Date, name if applicable and amount.

For the dates, you can either type them in or use the dropdown to select from a calendar.

Once these have been filled in the Calculate button becomes visible. Click on this to get your figures.



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Names: Mr Redbrick Middle Test

0845 166 2629

Matter: Other matters...

Fee earner: John Law

Partner: Peter Partner

Email to: <no email specified>

Purchase (Active)

UCRN: S999/2 26 Marville Road
Ref: Wallacey Merseyside CH45 5AY
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Price: £262,000.00

Tasks: No tasks

Leases: Save Calculate

Lease Dates: From Date: 01/01/1753 Handover Date: 01/01/1753 Expiry Date: 01/01/1753

| | Use Lease Dates | Use Lease Dates | Use Lease Dates | Use Lease Dates | Use Lease Dates |
|---------------------|-----------------|-----------------|-----------------|-----------------|-----------------|
| From Date: | 01/04/2019 | 01/01/1753 | | | |
| Handover Date: | 10/06/2019 | 01/01/1753 | | | |
| Expiry Date: | 31/03/2020 | 01/01/1753 | | | |
| Ground Rent p/a: | 250.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| Service Charge p/a: | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| Insurance p/a: | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| Other p/a: | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |

Apportionments:

| | | | | | |
|----------------|---------|----|----|----|----|
| No of Days: | 70 | 0 | 0 | 0 | 0 |
| Value Paid: | £47.81 | £0 | £0 | £0 | £0 |
| Rem Days: | 296 | 0 | 0 | 0 | 0 |
| Rem Value Due: | £202.19 | £0 | £0 | £0 | £0 |
| Total Days: | 366 | 0 | 0 | 0 | 0 |

- **No of Days** – These are the number of days that have already been paid in the date range you have entered.
- **Value Paid** – Is the amount already paid in the date range you have entered as per the monetary value you have entered.
- **Rem Days** – These are the remaining days to be paid in the date range you have entered taking into consideration the handover date.
- **Rem Value Due** – Is the amount remaining to pay as per the date range entered, the handover date and monetary value entered.
- **Total Days** – This is the amount of days (including bank holidays and weekends) for the date range you have entered.

You can make changes to these at any time by re-entering dates and the amount, then click the Calculate button again.

If you click save then the figures will be stored against the matter, if you don't save the figures will be removed when leaving this section.

If you have any queries on Redbrick please either contact your dedicated Business Consultant or our Support team.



Support

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