

Introduction

Data entry in LeaseControl is controlled by the completion of forms, dropdown boxes and libraries. This is to ensure consistency between multiple users as well as increase user input speed.

This quick guide is a reference to assist identifying the dropdown options which belong to each library, whether it be located in a library, module or configuration. Or whether it is simply freeform text, where any text or value may be entered.

The guide is split into five sections, covering each of the LeaseControl modules and detailing each modules options to Add New forms along with the accompanying library reference table.

Modules are: Projects, Contacts, Accounts, Lease and Agreements

1. Projects:

Add New Project Card

Project Library Reference Table

Field	Type	Library Location
Project Code	Freeform Text	N / A
Project Name	Freeform Text	N / A
Cost Code	Freeform Text	N / A
Locality	Dropdown	Settings -> Lease Configuration -> Location Tree
Status (Ops)	Dropdown	Settings -> Libraries -> Project -> Project Status
Project Manager	Dropdown	Contacts -> Contacts Browser
Lease Manager	Dropdown	Contacts -> Contacts Browser -> Lease Manager
Responsible Party	Dropdown	Contacts -> Contacts Browser
District	Dropdown	Settings -> Libraries -> Project -> District
Region	Dropdown	Settings -> Libraries -> Lease -> Region
Comments	Freeform Text	N / A

2. Contacts:

Add New Contact Card

LeaseControl (LC_DemoV181) - [Add Contact]

File Tools Actions Lease Accounts Agreements Contacts Projects Settings Windows Help

New Contact
Add a new contact and click the OK button when done.

First Name: E-Mail:

Last Name: Web Address:

Company Name: ACN: ABN:

Category: Enforce Australian Numbering

Display: Parent Contact:

Phone numbers
Select the type of phone number and click the button to enter or edit the number.

Business...

Business Fax...

Addresses
Select the type of address and click the button to enter or edit the address.

Business...

This is the default address

Notes:

OK Cancel Apply

Contacts Library Reference Table

Field	Type	Library Location
First Name	Freeform Text	N / A
Last Name	Freeform Text	N / A
Company Name	Dropdown	Contacts -> Contacts Browser
Category	Dropdown	Settings -> Libraries -> Contact -> Contact Type
Display	Freeform Text	N / A
E-Mail	Freeform Text	N / A
Web Address	Freeform Text	N / A
CAN	Freeform Numerical	N / A - 9-character requirement
ABN	Freeform Numerical	N / A - 11-character requirement
Parent Contact	Dropdown	Contacts -> Contacts Browser
Phone Type	Dropdown	Settings -> Libraries -> Contact -> Phone Type
Address Type	Dropdown	Settings -> Libraries -> Contact -> Address Type
Phone Country / Region	Freeform Text	N / A
Phone City / Area Code	Freeform Text	N / A
Phone Number	Freeform Text	N / A
Address Street	Freeform Text	N / A
Address Suburb	Freeform Text	N / A
Address State/Province	Freeform Text	N / A
Address ZIP/Postal Code	Freeform Text	N / A
Address Country / Region	Dropdown	N / A - No library
Notes	Freeform Text	N / A

3. Accounts

Add New Account Card

LeaseControl (LC_DemoV181) - [New Account]

File Tools Actions Lease Accounts Agreements Contacts Projects Settings Windows Help

New Account
Add a new account and click the 'Save' button when done.

Account Name:

Description:

Balance:

Maximum Area:

Area Units:

Accounts Library Reference Card

Field	Type	Library Location
Account Name	Freeform Text	N / A
Description	Freeform Text	N / A
Balance	Freeform Numerical	N / A
Maximum Area	Freeform Text	N / A
Area Units	Dropdown	Settings -> Libraries -> Lease -> Area Units

4 - Lease

Add New Lease Card

LeaseControl (LC_DemoV181) - [New Lease]

File Tools Actions Lease Accounts Agreements Contacts Projects Settings Windows Help

New Lease
Add a new lease and click the save button.

Lease Details
Lease:
Lease Name:
Locality:
Project:
Region:
Lease Type:

Status
Lease Status:
Internal Status:

Lease Dates
Application: Granted: Expiry:
Relinquished: Renewal:

Lease Contacts
Lease Manager:
Managing Company:
Operator:
Responsible Party 1:
Responsible Party 2:
Govt Office:
Total Shares:

Lease Commitment
Commitment: This Year Next Year
Rent: This Year Next Year
Account:

Area Details
Area Units: Current Area Held: Area Applied For: Granted Area: Area surveyed?

Other
Primary Commodity: Mineral Field:

Financial
Financial System Lease ID:
Lease Cost Code(s):

Lease Library Reference Table

Section	Field	Type	Library Location
Lease Details	Lease	Freeform Text	N / A
Lease Details	Lease Name	Freeform Text	N / A
Lease Details	Locality	Freeform Text	Settings -> Configuration -> Lease -> Location Tree
Lease Details	Project	Dropdown	Projects -> Project Browser
Lease Details	Region	Dropdown	Settings -> Libraries -> Lease -> Region
Lease Details	Lease Type	Dropdown	Settings -> Configuration -> Lease -> Location Tree
Area Details	Area Units	Dropdown	Settings -> Libraries -> Lease -> Area Units
Area Details	Current Area Held	Freeform Numerical	N / A
Area Details	Area Applied For	Freeform Numerical	N / A
Area Details	Granted Area	Freeform Numerical	N / A
Status	Lease Status	Dropdown	Settings -> Libraries -> Lease -> Status
Status	Internal Status	Dropdown	Settings -> Libraries -> Lease -> Internal Status
Contacts	Lease Manager	Dropdown	Contacts -> Contacts Browser -> Lease Manager
Contacts	Managing Company	Dropdown	Contacts -> Contacts Browser
Contacts	Operator	Dropdown	Contacts -> Contacts Browser
Contacts	Responsible Party 1	Dropdown	Contacts -> Contacts Browser
Contacts	Responsible Party 2	Dropdown	Contacts -> Contacts Browser
Contacts	Govt Office	Dropdown	Contacts -> Contacts Browser -> Government Office
Contacts	Total Shares	Freeform Numerical	N / A
Dates	ALL	Freeform Calendar	N / A
Other	Primary Commodity	Dropdown	Settings -> Libraries -> Lease -> Commodity
Other	Mineral	Dropdown	Settings -> Libraries -> Lease -> Mineral Field
Other	Field	Dropdown	Settings -> Libraries -> Lease -> Mineral Field
Commitment	Commitment Year End	Freeform Numerical	N / A - Auto-Generated
Commitment	Rent Year	Freeform Numerical	N / A - Auto-Generated
Commitment	Account	Dropdown	Accounts -> Account Browser

5 Agreements

Add New Agreement Card

LeaseControl (LC_DemoV181) - [New Agreement]

File Tools Actions Lease Accounts Agreements Contacts Projects Settings Windows Help

New Agreement
Add a new Agreement and click the save button.

Agreement Details

Agreement Number: Agreement Name: Status:

Type: Locality:

Extra Details

Project: Region: Commodity:

Stamp Duty Amount: Paid

Overhead Percent: Overrun Allowed:

Registration Number:

Document Name:

Number:

Contacts

Manager: ...

Responsible Party 1: ...

Responsible Party 2: ...

Responsible Dept:

Operator: ...

Royalty

Active

Status:

Type:

Type Desc:

Dates

Execution: Commence: Expiry: Registration:

Misc

Pre-emptive Rights Technical Reporting

Caveats Lodged Executed

GST Registered JV Monthly Reporting

Dilution Clause Quarterly Reporting

Agreement Library Reference Table

Section	Field	Type	Library Location
Agreement Details	Agreement Number	Freeform Text	N / A
Agreement Details	Agreement Name	Freeform Text	N / A
Agreement Details	Status	Dropdown	Settings -> Libraries -> Agreement -> Status
Agreement Details	Type	Dropdown	Settings -> Configuration -> Agreement -> Location Tree
Agreement Details	Locality	Dropdown	Settings -> Configuration -> Lease -> Location Tree
Extra Details	Project	Dropdown	Projects -> Projects Browser
Extra Details	Region	Dropdown	Settings -> Libraries -> Lease -> Region
Extra Details	Commodity	Dropdown	Settings -> Libraries -> Lease -> Commodity
Extra Details	Stamp Duty Amount	Numerical	N / A
Extra Details	Overhead Percent	Numerical	N / A
Extra Details	Overrun Allowed	Numerical	N / A
Extra Details	Registration Number	Freeform Text	N / A
Extra Details	Document Name	Freeform Text	N / A
Extra Details	Number	Freeform Text	N / A
Contacts	Manager	Dropdown	Contacts -> Contacts Browser
Contacts	Responsible Party 1	Dropdown	Contacts -> Contacts Browser
Contacts	Responsible Party 2	Dropdown	Contacts -> Contacts Browser

Contacts	Responsible Dept.	Dropdown	Settings -> Libraries -> Agreement -> Department
Contacts	Operator	Dropdown	Contacts -> Contacts Browser
Dates	ALL	Freeform Calendar	N / A
Royalty	Royalty Status	Dropdown	Settings -> Libraries -> Agreement -> Royalty Status
Royalty	Royalty Type	Dropdown	Settings -> Libraries -> Agreement -> Royalty Type
Royalty	Royalty Type Description	Freeform Text	N / A

If you have any questions on how to use libraries or any other functionality within this solution, please contact us at servicedesk@maxgeo.com.