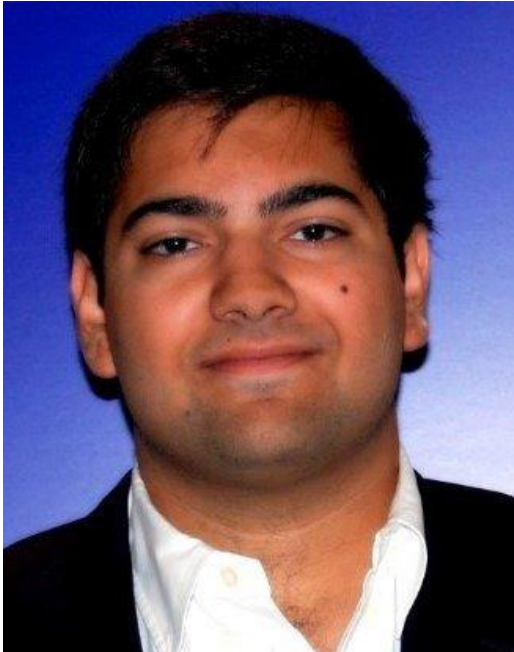


# AI Lease Abstraction for Maximo and TRIRIGA

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**eCIF-M® Solutions Inc.**

# Introduction



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**Director of Product at eCIFM Solutions**

Aman Singh is a Director of Product at eCIFM. He has 7+ years experience building B2B and B2C software. He focuses on building new products in the PropTech and IWMS spaces

Previously, he ran the New Products team and the Growth Product team at Glassdoor. Before that, he built B2B marketing attribution software. He started his career in management consulting at Deloitte.

# Lease Management and AI

## Scenario

- Leases are an essential artifact of business regardless of their size.
- They are crucial to properties, assets, and licenses.
- In the past, lease abstraction has been a costly and painful process that requires intimate knowledge of the legality of leases. Generally, organizations hire outside legal services to extract individual leases for hundreds, if not thousands of dollars per lease.
- Many organizations do not store their detailed lease information such as warranties or clauses in their system of record. They just store
  - General information (location, address, tenant details)
  - Critical Dates
  - Payment Schedule Line items (including escalations

# Lease Management and AI

## **Opportunity**

- With the advances in large language models in recent years, eCIFM saw an opportunity to build an AI Lease Abstraction tool, enabling teams to interact with their leases in a straightforward way regardless of formatting or state of the document

eCIFM identified a market need for a cost-efficient lease extraction, abstraction, and referencing for systems of record (e.g., TRIRIGA, Maximo)

# Lease Management and AI

## Solution

eCIFM built a product with a series of prompts for GPT4o to extract information from uploaded leases and amendments.

## 1. Design Approach

- They are organized into prompt families. Each family corresponds to a particular feature within a lease and has been fine-tuned to extract exactly the right information.
- The prompt families are batched to drive token efficiency by reducing context token usage for each request.
- The prompt families have been aligned to the structure of the lease object in TRIRIGA, can be easily adjusted for Maximo

# Lease Management and AI

## 2. Legal Accuracy and Precision

- This product and its prompts have been reviewed and tuned with a legal team to ensure that accurate information is being extracted every time.
- Temperature of the model is set to near-zero (resulting in deterministic responses)
- Top-P has been set low (resulting in more coherent and contextually appropriate text)

## 3. Data Journey

- Leases uploaded into this tool in all formats (PDF, email, scans) can be easily abstracted & uploaded into TRIRIGA or Maximo without the use of data templates (past method of updating these systems)

# Case Study: Government Client

## Situation

- A government client with over 60 million square foot of real estate needed an extraction and abstraction of their 40 real estate leases and 200 license agreements.
  - This included 48 payment types, all possible options, and clauses.
  - Their leases were in all different formats from PDFs to scans of existing documents, including leases with multiple amendments and subleases
- This client used AI Lease Abstraction to save countless hours of manual review of data templates
  - Our estimate of saved time is 480 hours.

## Outcome

Lease abstractions were effectively added to their TRIRIGA, leading to accurate Lease Accounting from Day One

# Sample Lease

This tool can be used  
for property leases,  
license agreements,  
asset leases /  
warranties

The tab structure is similar to the Lease object of TRIRIGA

REVIEWER ▾

Property Name

- Review Complete

RELOAD

General Information - 100%

General

Document

Comments

Name

Property Name

Details

Accounting Type

Accounts Payable (AP)

Payment Timing

Payment in Arrears

Rentable Area

1000

Critical Dates

Commencement Date

2020-01-01

Base Lease Expiration Date

2024-12-31

Primary Address

Address

Property Address

PROJECT

GENERAL

CLAUSES (9)

OPTIONS (3)

PAYMENTS (1)

The green checkmarks indicate a reviewing functionality



# Extraction Reasoning

Critical Dates

Explanation of extraction for [Commencement Date]

Explanation

The Lease Commencement Date is explicitly stated as January 1, 2020, in the lease terms under Section 2.1 Term and Termination [4:0†source] .

CLOSE

Commencement Date

2020-01-01

Base Lease Expiration Date

2024-12-31

PROJECT

GENERAL

CLAUSES (9)

OPTIONS (3)

PAYMENTS (1)

There is an explanation action that cites where the information was extracted from

# Notes / Feedback

Critical Dates

Edit Notes for [Commencement Date]

Notes

CANCEL

Commencement Date

2020-01-01

Base Lease Expiration Date

2024-12-31

PROJECT

GENERAL

CLAUSES (9)

OPTIONS (3)

PAYMENTS (1)

There is a notes section where reviewers can add notes / flag items

# Clauses

REVIEWER ▾

Property Name

- Review Complete

RELOAD

Clauses (9)			Exclusivity - 100%	
Exclusivity		100%	Lease Clause Details	
Holdover	100%	<div>Clause Summary Landlord hereby leases to Tenant the following described premises situated in the <b>Township</b>, to wit: Approximately 1000 square feet of office space located at _____ as described in Exhibit A attached hereto and incorporated herein by reference, together with a non-exclusive interest in the common areas.</div>		
Insurance & Indemnification	100%			
Parking	100%			
Repairs & Maintenance Responsibilities	100%			
Services & Utilities	100%			
Signage	100%			
Sublease	100%			
Tenant Defaults	100%			

PROJECT

GENERAL

CLAUSES (9)

OPTIONS (3)

PAYMENTS (1)

The tool looks from a customizable list of clauses and only pulls clauses that are exact matches within the lease

# Options

REVIEWER ▾

Property Name

Review Complete

RELOAD

Options (3)			Renewal - 100%	
Extension	100%	>	Details	
Renewal	100%	>	Option Text SECTION 2. TERM AND TERMINATION	
Termination	100%	>	2.2 Option to Extend. Tenant may choose to extend the Term, on the same terms, conditions and provisions as contained in this Lease, including rent, for two (2) consecutive periods of five (5) years each by providing advance written notice of its intent to renew to the Landlord at least thirty (30) days prior to the end of the Term (the "Extension Period"). The First Option Period shall commence on the fifth (5th) anniversary of the Commencement Date and end on the day before the tenth (10th) anniversary of the Commencement Date. The Second Option Period shall commence on the tenth (10th) anniversary of the Commencement Date and end on the day before the fifteenth (15th) anniversary of the Commencement Date. Upon the exercise by Tenant of an option to extend, Landlord and Tenant shall enter into a written amendment to this Lease.	

PROJECT

GENERAL

CLAUSES (9)

OPTIONS (3)

PAYMENTS (1)

The tool does the same for options as it does clauses

# Payment Schedules

This tool looks for all the payment schedules that are in TRIRIGA and extracts exact matches

REVIEWER ▾

Property Name

- Review Complete

RELOAD

☰

Generate Payment Schedules

✓

↶

📄

💬

Accounting Type

Accounts Payable (AP)

✓

↶

📄

💬

Frequency

Monthly

✓

↶

📄

💬

Full Payment Start Date

2020-01-01

✓

↶

📄

💬

Payment End Date

2024-12-31

✓

↶

📄

💬

Payment Due

Specific Day of Period

✓

↶

📄

💬

Payment Due Day

Not Applicable

✓

↶

📄

💬

Amount Per Basis

1000

✓

↶

📄

💬

Escalations

No escalation

✓

↶

📄

💬

Payment Schedule Line Items

From Date	To Date	Amount
2020-01-01	2024-12-31	1000

✓

↶

☰

Payment Instruction

✓

↶

PROJECT

GENERAL

CLAUSES (9)

OPTIONS (3)

PAYMENTS (1)

The tool will generate payment schedule line items by examining term of lease, escalation, and starting rent. These will be imported into TRIRIGA

# Lease Data Journey

## eCIFM's Lease Abstraction Tool



General Information

General

Name

Units

Currency  
US Dollars

Area Units  
square foot

Details

Lease Type  
Expense Lease

Lease Category  
Class A

Primary Use  
Office

Contract Status  
Active

Is Cost or Fair Market Value Determinable?  
Yes

Accounting Type  
Accrual

Payment Timing

CONFIG GENERAL CLAUSES OPTIONS



# Continuing the Journey

## Features under development

- Direct references to the lease document in the tool rather than page references
- General availability AI Assistant so that reviewers can talk to their leases
- Enhanced UX
- Notifications for when leases have been imported into TRIRIGA or Maximo

# Questions?

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