Lead Office List Online System

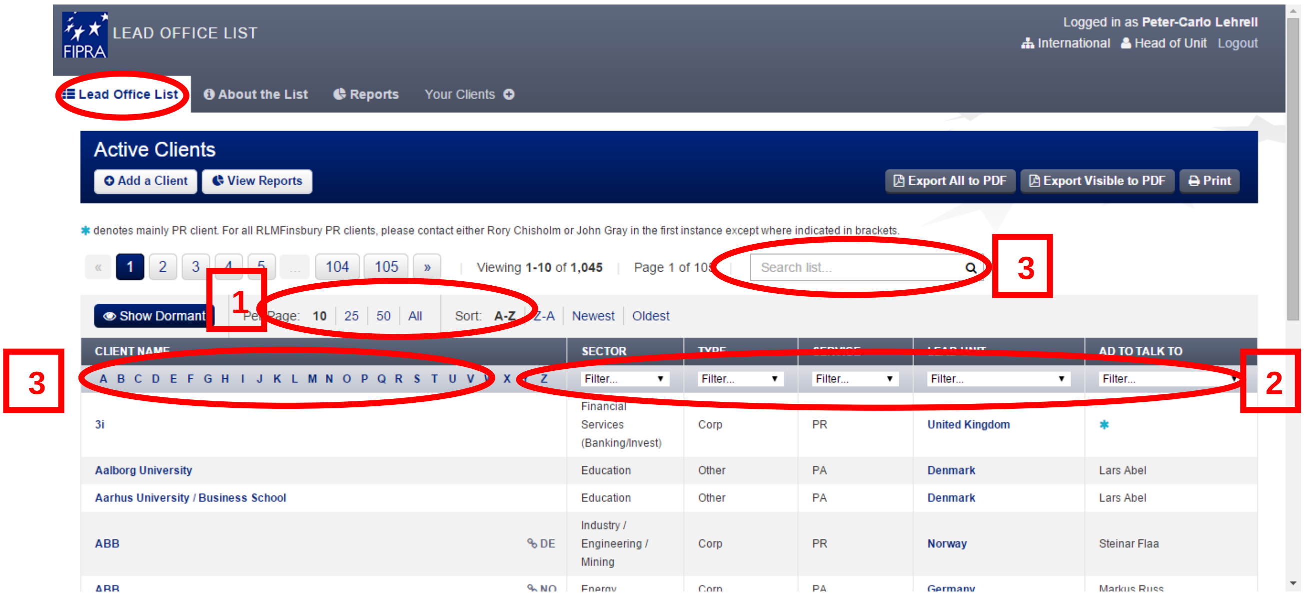
The System is hosted on http://leadofficelist.fipra.com/

Logging in:
Login using the login details issued to you by email or contact claire.kavanagh@fipra.com if you have forgotten your details.

Heads of Units and Special Advisers have access to **view** the full list from all units and to **edit** their own unit information. Any member of the Network can **view** information on the system by using a guest log in

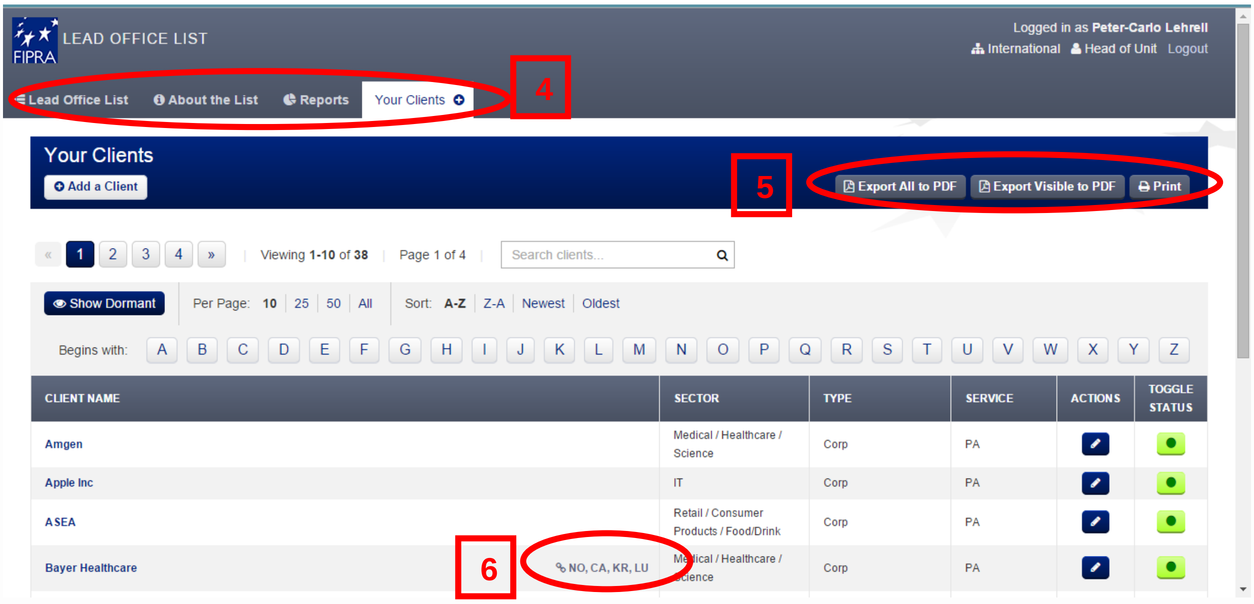
Guest Login: leadofficelist@fipra.com
Guest password: fipriot

Lead Office List Tab:
When you log in you will see the **full** Lead Office list sorted alphabetically by Client.



From this screen you can:

1. Navigate between views ie how many records you wish to view per page
2. Sort the list by using the filter drop-down buttons.
    a. by sector,
    b. by type,
    c. by service,
    d. by Lead Unit/Person and
    e. by Account Director
3. Search for a Client on the list using the Search List box or the A-Z
4. Navigate to the About the list, Reports and Your Clients tabs
5. The sorted lists can be Exported to PDF or Printed
6. In most cases, only one unit has the lead and therefore a direct contractual relationship exists. Where two units, or a Unit and a Spad for example, in different jurisdictions have a contract with the same client, this is indicated by a link icon and the country initials or the Special Adviser's initials (followed by (sa)) and multiple entries are made.



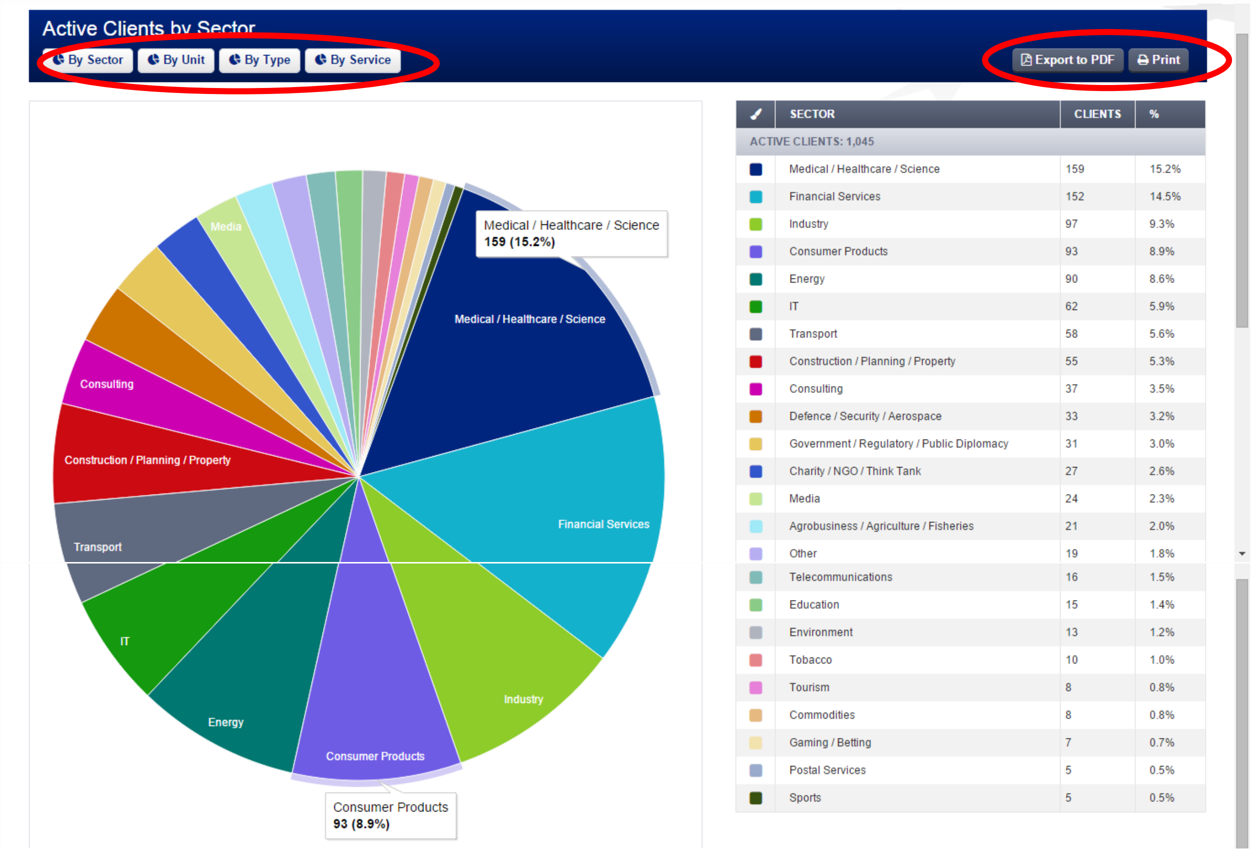
About the List brings you to a detailed explanatory note about the Lead Office List. This was page one on the printed list and contains very important information. Please read it!

Reports:

Click on the Reports tab to view, download and print a range of reports. This information is always live and up to date.

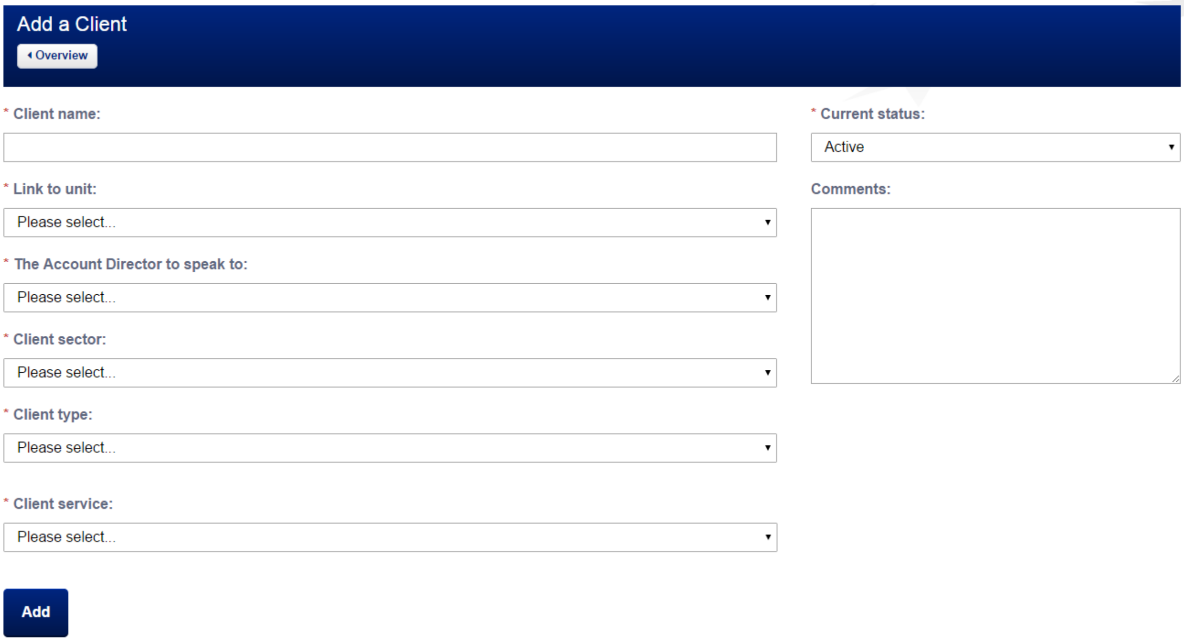
Click on the **By Sector**, **By Unit, By Type**, **By Service,** buttons to navigate between different reports.

Reports can also be Downloaded as PDF's or printed.

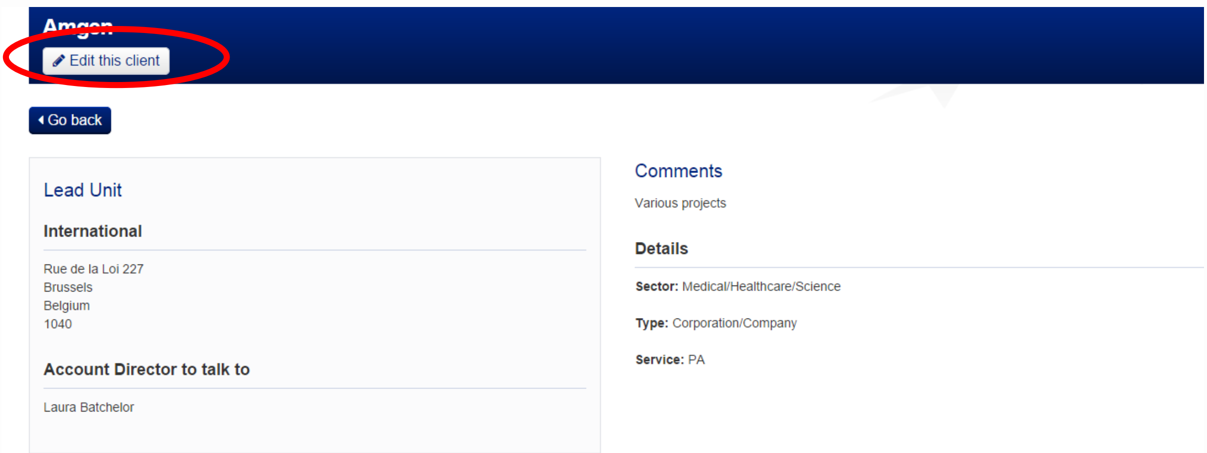


Your Clients: (*Heads of Units and Special Advisers only*) brings you to an alphabetical list of your clients that you can view, add, edit or update

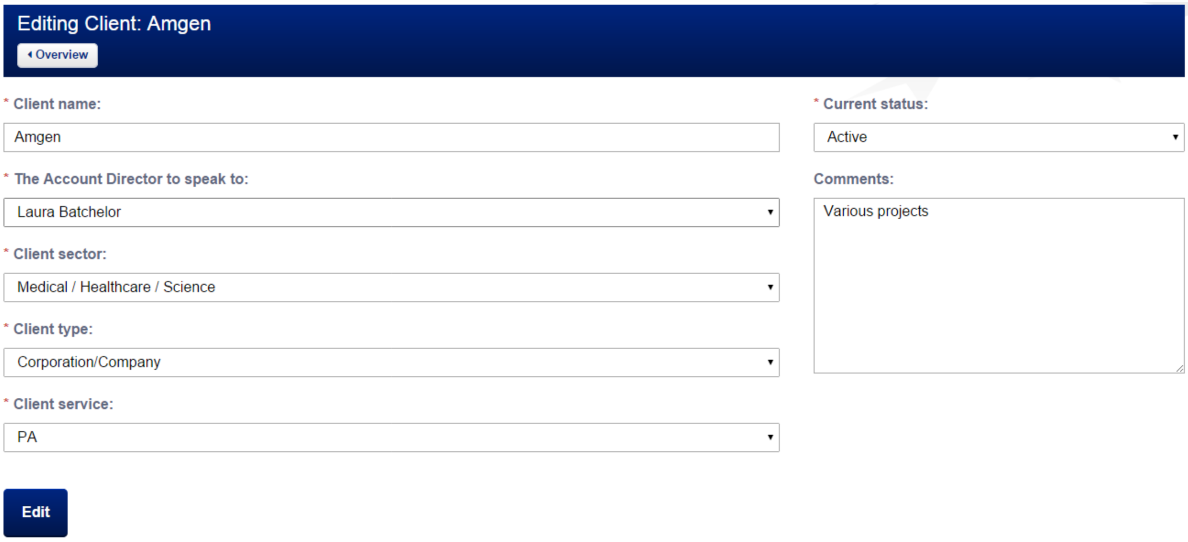
To Add:
On the Clients tab, click the **Add a Client** button on the top left hand corner. Use the tab key to navigate through the fields. Please remember to include a comment.
When you have completed the form just click the **Add** button.



To View:
Click on the client name to see what information is stored in the system.
Use the **Go Back** button to go back to your list.

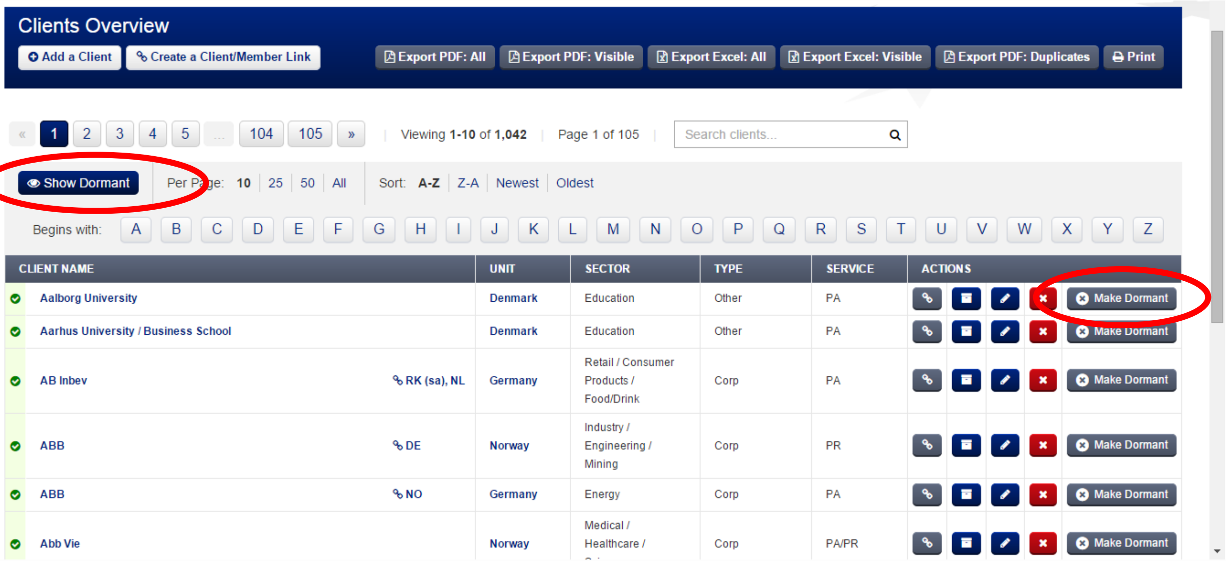


To Edit:
Use the **Edit this Client** button or from the main view use the pencil button which is under Actions.

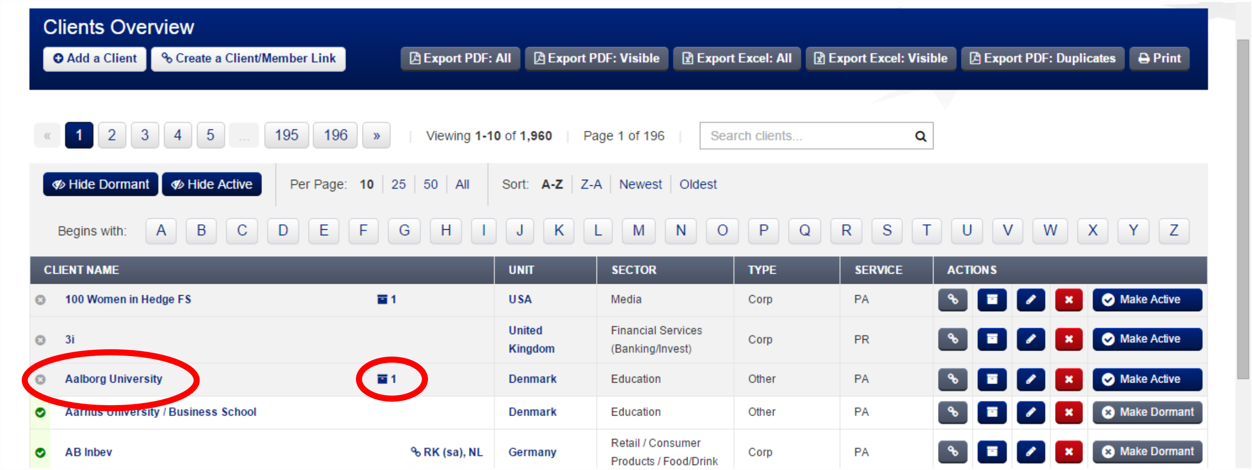


Use the tab button to quickly move through and update the fields.
Click Edit to save your updates.

There is no option to delete a client as we wish to create a full history just mark a client as Dormant if you no longer work with them. To make a client dormant click the make dormant button. By clicking this, the system creates a history by automatically creating an archive record. Simply click **Go Back** to return to your list



Below is the view of Dormant Clients and the Archive record created.



NOTE: *There is no option to delete a client as we wish to create a full history.*

If you need any help with this or have any questions, comments or feedback please contact Claire Kavanagh on +353 26 489 36 or claire.kavanagh@fipra.com