LEASE-DESK

Main Access User Manual

Version 1.0

Note: Main users will only be able to able to add prospect agreements: this needs clarifying in manual with all info once PP finished

Table of Contents

1. Introduction to Lease-Desk:

Lease-Desk is a Portfolio Management System designed specifically by Proctor Consulting, which provides a dedicated platform for Technology Vendors to view and manage all current and pending Customer Agreements in one place.

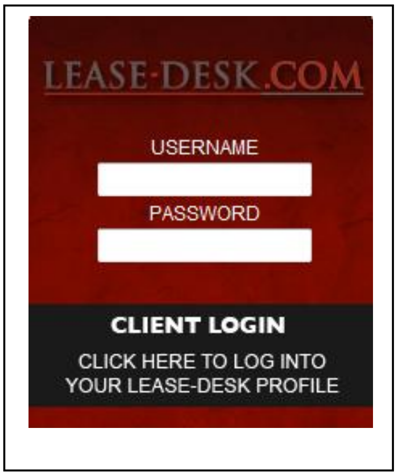
Once the existing Vendor data has been uploaded by Proctor Consulting's Lease-Desk Administration team, main access users are able to view and/or edit their individual or teams current pending or live customer agreements, and view an overall snapshot of all current agreements via the dashboard. All available repeat business opportunities are indicated via the dashboard functionality so that Sales Managers can view all leasing activity, making it easier to manage and ensure no repeat business opportunity gets missed again.

In addition, email notifications are sent to relevant Individuals, Teams and Management relating to end of term actions so that no action is missed, helping to increase customer retention and increase customer satisfaction by being able to continually offer support and advice and assist customer requirements both now and in the future.

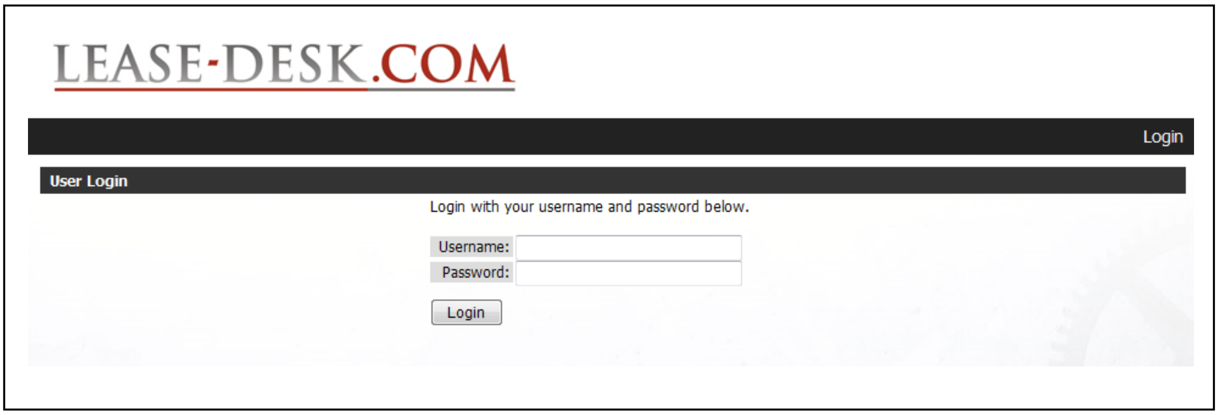
The following user guide is aimed at all 'Main' Access Users who have been set up with a Lease-Desk Account. As a Main user you will generally have 'reader' access rights to the groups that you have been set up in by the administrators. This means that you can view all of the live and pending agreement information for all writers within the groups you are in.

2. Logging into Lease-Desk:

1. Go to www.Lease-Desk.com and click on the Client Login box as per below.



2. You will then be presented with the User Login page, as per below.

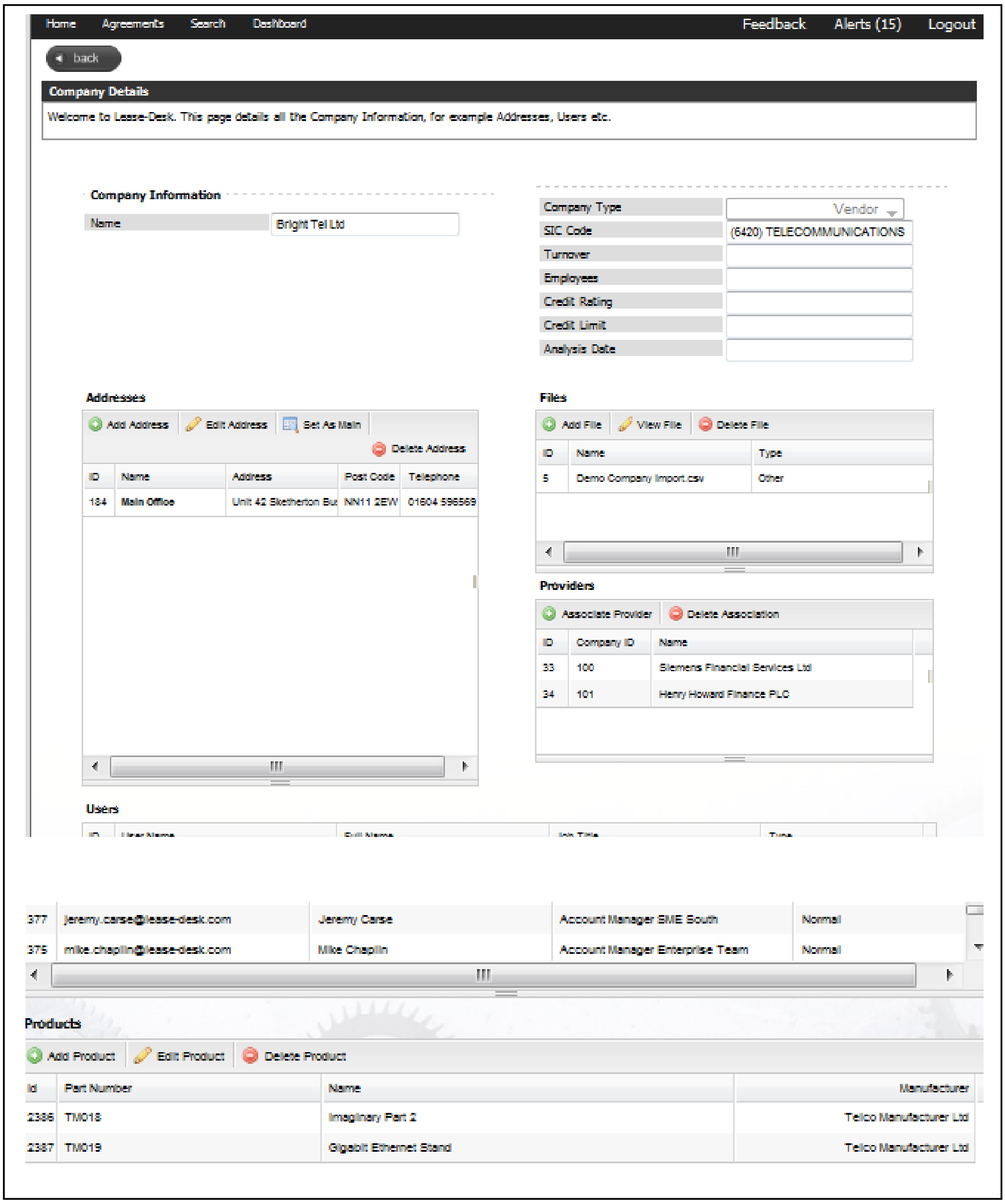


3. Enter your details and click on Login

4. To Log Out, select Logout from the top menu screen.

3. Home Screen: Adding, Editing, Viewing & Deleting

1. Once you have logged in you will be presented with the home screen, as indicated in two parts below;



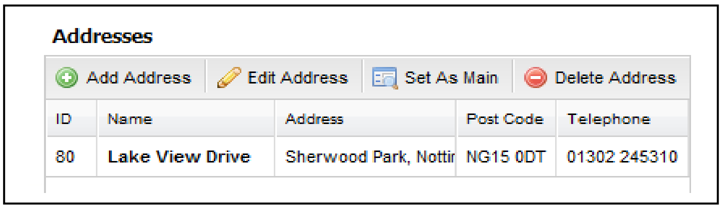
2. This screen details information relating to your company such as Addresses, Files, Users, Products (if you are a Vendor), and Financial Products (if you are a Financial Provider).

3.1. Adding, Editing, Setting as Main, and Deleting Addresses:

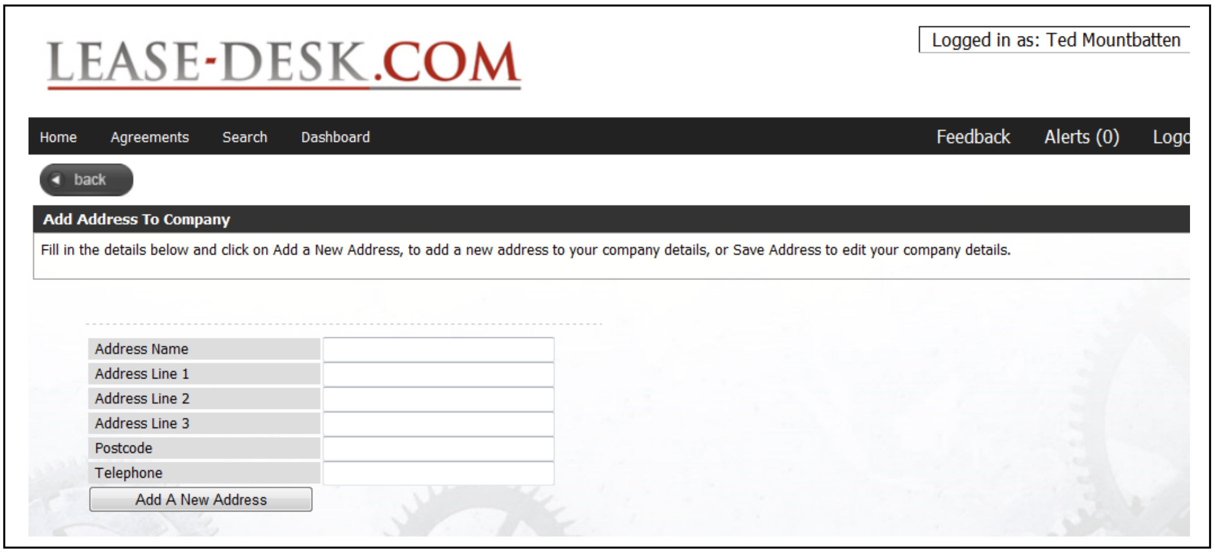
3.1.1. Adding an Address:

1. Click on 

from the main Addresses table as indicated below.



2. You will then be presented with the following ‘Add an Address’ screen;



3. Fill in the full address details and click on 

4. You will then be taken back to your Company Details screen in Edit mode and be presented with the following confirmation message;

5. The address will also appear within the 'Addresses Table' as per below;

Addresses

Add Address | Edit Address | Set As Main | Delete Address

ID	Name	Address	Post Code	Telephone
80	**Lake View Drive**	Sherwood Park, Nottir	NG15 0DT	01302 245310
125	Manor Farm	Harwell, Doncaster	DN10 5BU	01302 245315

3.1.2. Editing an Address:

1. From the main Addresses table, highlight the required address as indicated below;

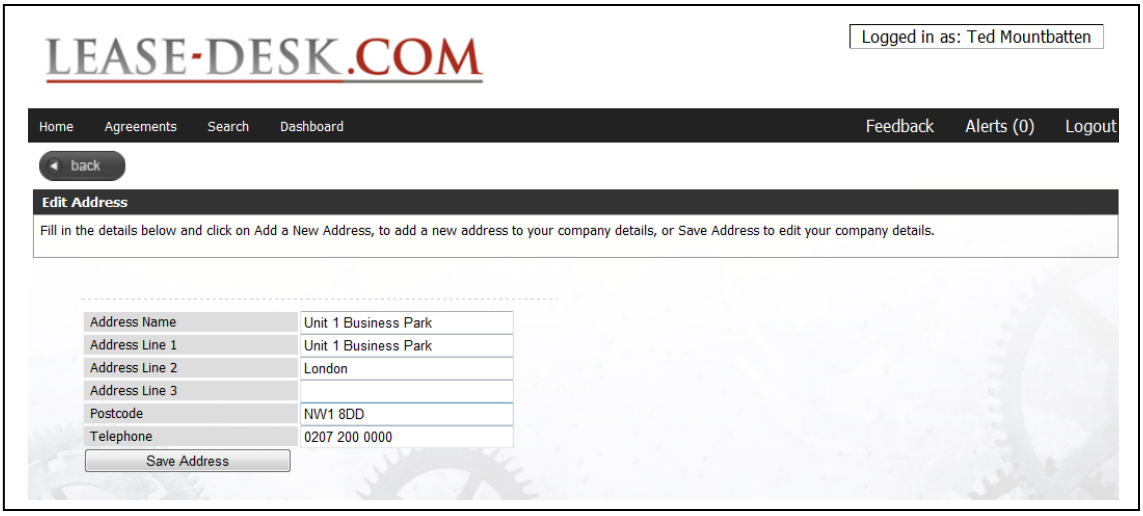
Addresses

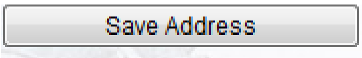
Add Address | Edit Address | Set As Main | Delete Address

ID	Name	Address	Post Code	Telephone
80	**Lake View Drive**	Sherwood Park, Nottir	NG15 0DT	01302 245310
125	Manor Farm	Harwell, Doncaster	DN10 5BU	01302 245315

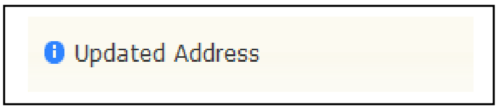
2. Click on Edit Address

3. You will then be presented with the 'Edit Address' screen as indicated below;



4. Amend the required Address details and click on 

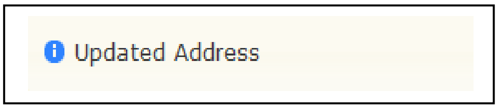
5. You will then be presented with the following confirmation message and taken back to your main Company Details screen, in Edit mode.



3.1.3. Setting an Address as Main:

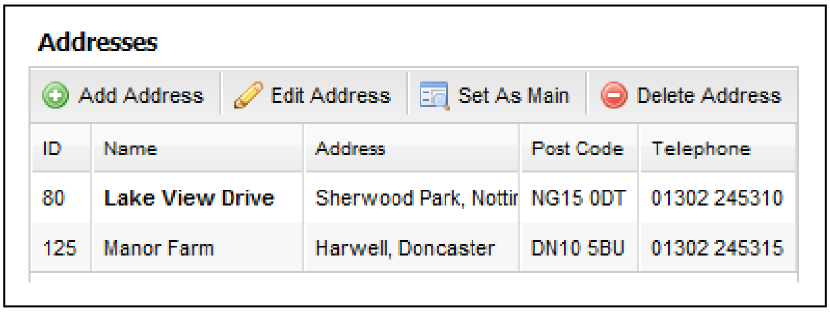
1. To set an address against your Company Details as the main site address, highlight the required address (as indicated previously) and click 

2. You will then be presented with the following confirmation message;



3. The main site address will also be highlighted in bold within the Addresses table,

as indicated below;


Addresses

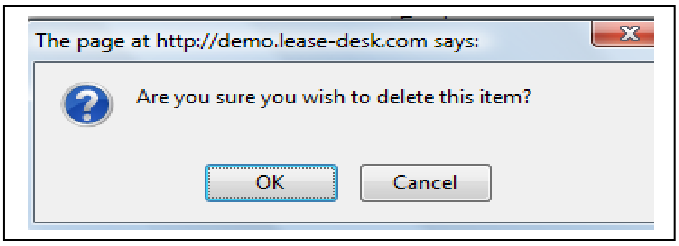
Add Address | Edit Address | Set As Main | Delete Address

ID	Name	Address	Post Code	Telephone
80	**Lake View Drive**	Sherwood Park, Nottir	NG15 0DT	01302 245310
125	Manor Farm	Harwell, Doncaster	DN10 5BU	01302 245315

3.1.4. Deleting an Address:

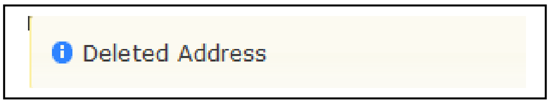
1. To delete an address from your Company Details, highlight the required address (as indicated previously) and click Delete Address

2. You will then receive the following message;



3. Click OK to delete (or Cancel to cancel the action).

4. Once you have confirmed deletion is required you will be presented with the following message and taken back to the Edit Company Details screen;

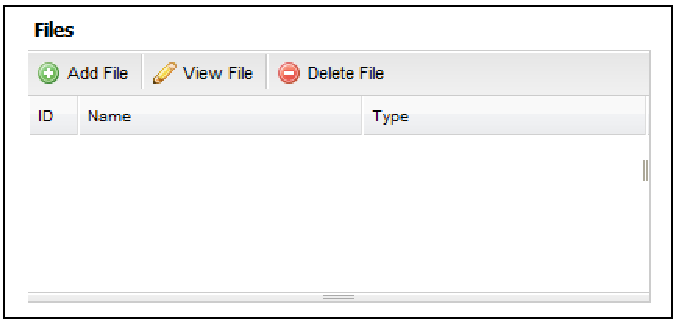


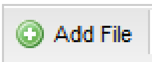
3.2. Adding, Editing, Viewing, and Deleting Files:

Please Note: You will need Adobe Reader installed for Adding and Viewing Files.

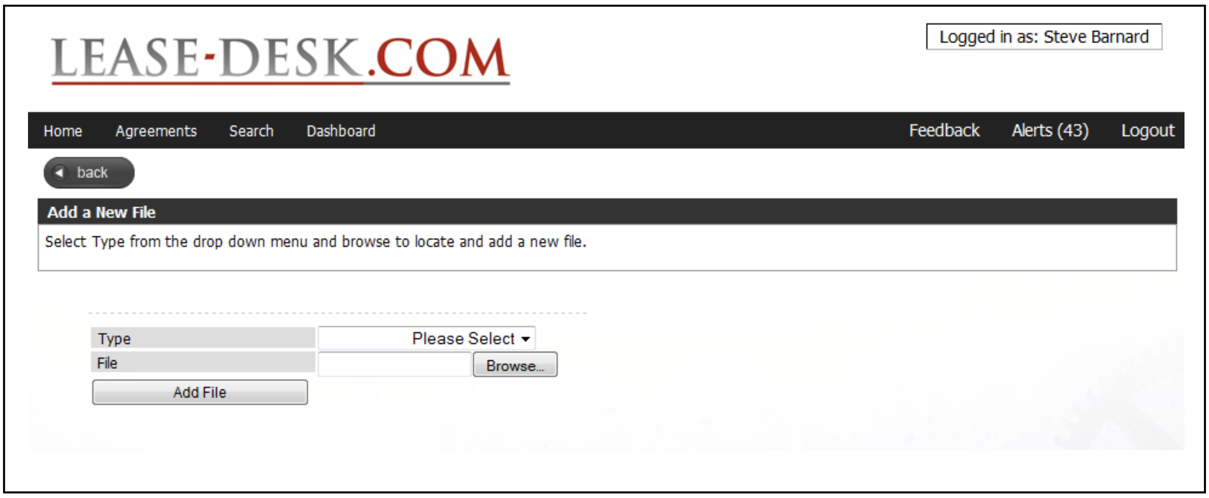
3.2.1. Adding a File:

1. Go to the Files table within the homepage, as indicated below;



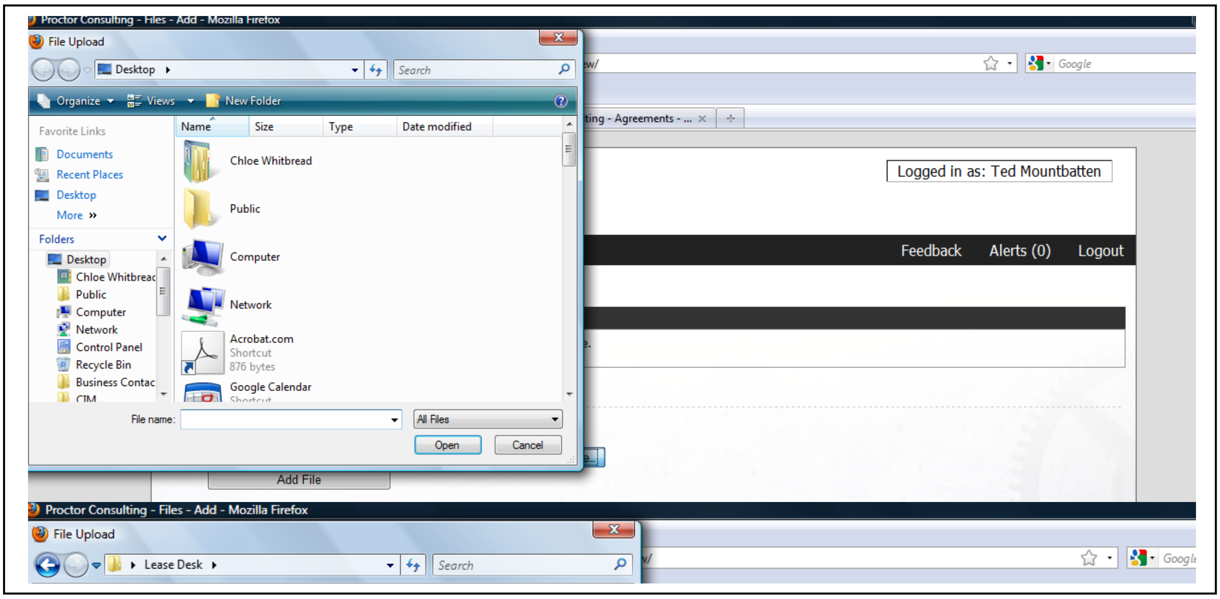
2. To add a file against your Company Details, click 

3. You will then be presented with the 'Add a New File' screen as indicated below;



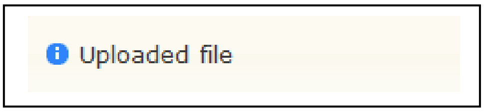
4. Select a 'Type' from the drop down menu, for example Credit Report, Management Accounts etc.

5. Click within the 'File' box and click on 'Browse' to look for the saved file from your PC, as indicated below;



6. To save the file against your Company Details, click 

7. You will then be taken back to the 'Edit Company Details' screen and receive the following confirmation message;



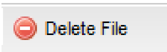
3.2.2. Viewing a File:

1. To view an existing file against your Company Details, go to the Files table within the homepage, as indicated previously, and highlight file required.

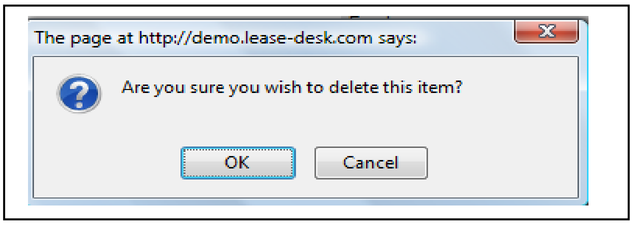
2. Click 

3.2.3. Deleting a File:

1. To delete a file against your Company Details, go to the Files table within the homepage, as indicated previously, and highlight file required.

2. Click 

3. You will then be presented with the following pop up screen;



4. Click on OK to delete (or Cancel to cancel action).

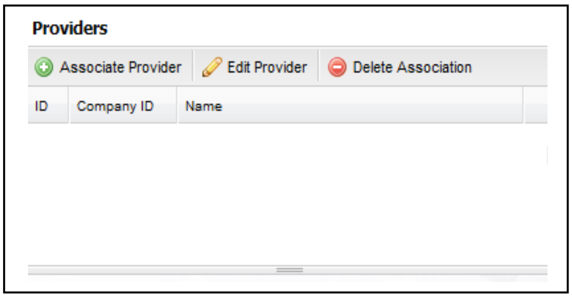
5. You will then be taken back to the Edit Company Details screen and receive the following confirmation message;

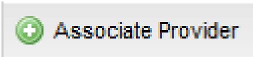
3.3. Providers: Associating, Editing, and Deleting Association:

3.3.1. Associating a Provider (Vendor Only):

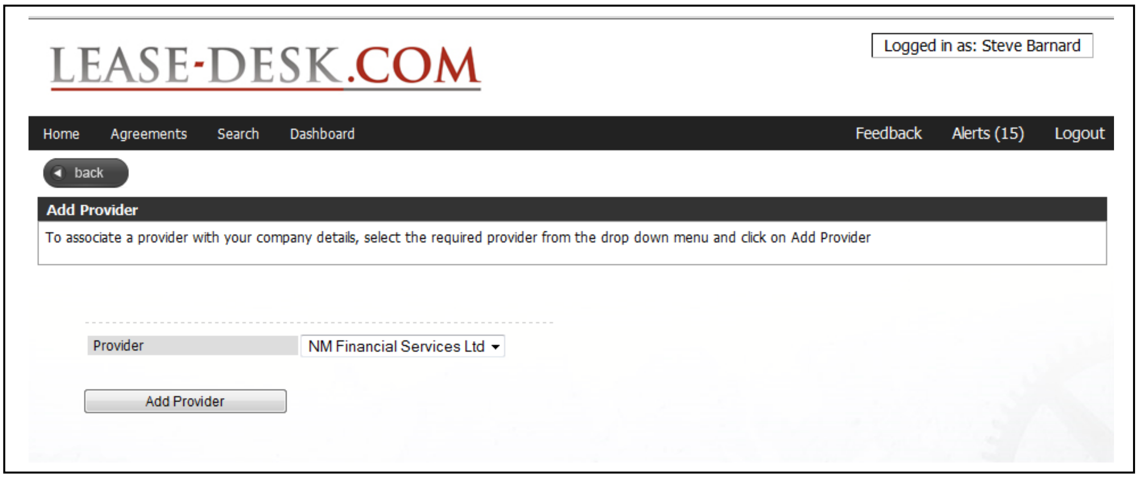
1. To associate a Provider with your Company, go to the Providers table, within the Edit

Company Details screen;



2. Click 

3. You will then be presented with the 'Add a Provider' screen as per below;



4. Select a Provider from the drop down menu and click 

5. You will then be taken back to the Edit Company Details screen.

3.3.2. Editing a Provider (Vendor Only):

1. To edit an associated Providers details, go to the Providers table, within the Edit

Company Details screen as previously shown.

2. Click 

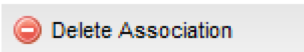
3. You will then be presented with the 'Edit Company Details' screen for the selected Provider.

4. Edit the details required from each table, i.e. Addresses, Company Details, Users, Financial Products, Files (following same process as indicated previously)

3.3.2. Deleting a Provider Association (Vendor Only):

1. To delete an associated Providers details, go to the Providers table, within the Edit

Company Details screen as previously shown and highlight the required Provider.

2. Click 

3. You will then be presented with the Confirmation Message. Select OK to delete or Cancel to cancel action.

4. You will then be taken back to the Edit Company Details screen.

3.4. Adding, Editing and Deleting Products (Vendor Only):

3.4.1 Adding a Product:

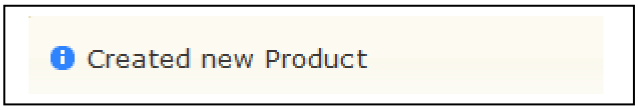
1. To add a Product to your Company Details, go to the main Products table within the homepage as indicated below;

2. Click 

3. You will then be presented with the 'Add a New Product' screen as indicated on the following page;

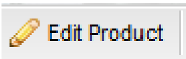
4. Fill in the details and click 

5. You will then be taken back to the main Company Details screen and receive the following confirmation;

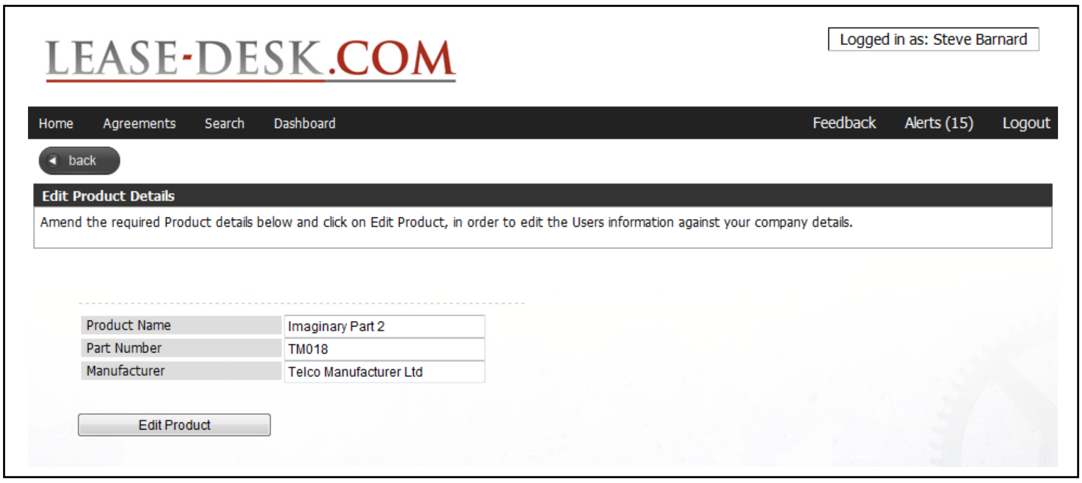


3.4.2 Editing a Product:

1. To edit an existing Product against your Company Details, go to the main Products table within the homepage as indicated previously and highlight the required product from the list.

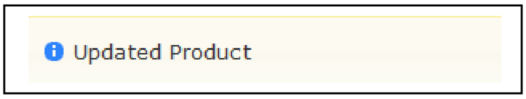
2. Click 

3. You will then be presented with the 'Edit Product Details' screen as per below;



4. Amend the required detail and then click 

5. You will then be taken back to the Company Details screen and will receive the following confirmation message;



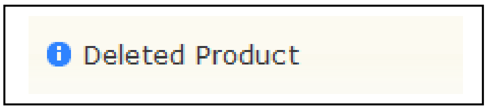
3.4.3 Deleting a Product:

1. To delete an existing Product against your Company Details, go to the main Products table within the homepage as indicated previously and highlight the required product from the list.

2. Click 

3. You will be presented with a confirmation pop up. Click OK to continue with the deletion or Cancel to cancel the action.

4. Once deleted you will be taken back to the Company Details screen and presented with the following confirmation message;



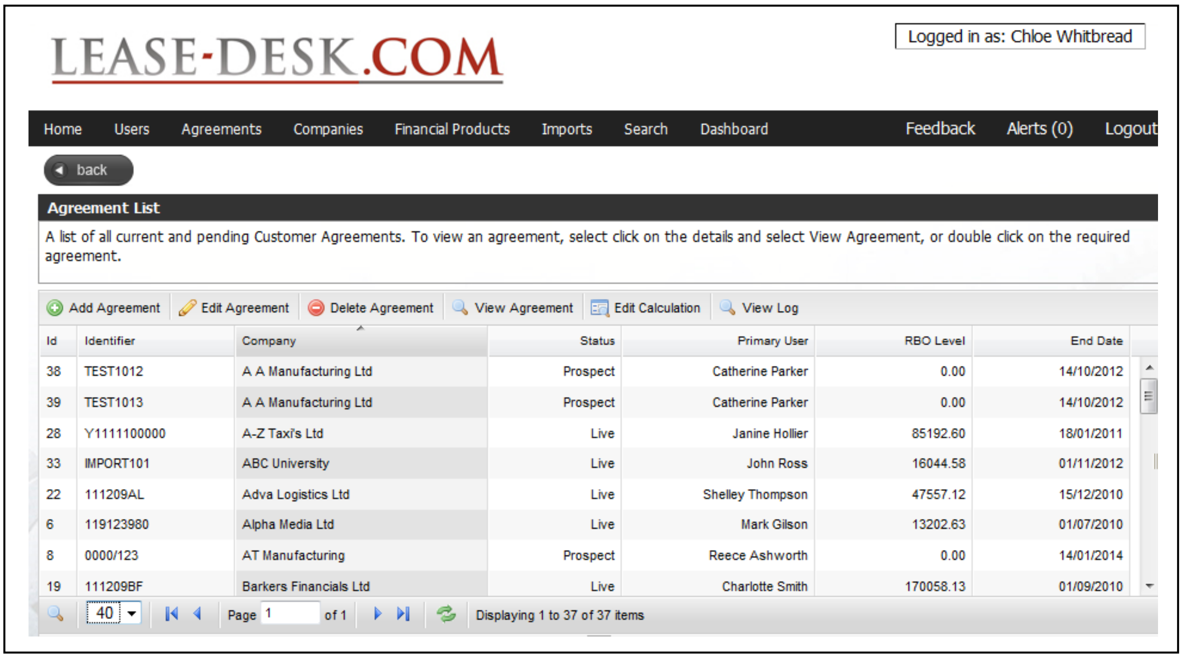
4. Agreements Screen: Adding, Editing, Viewing, and Viewing Audit Log

4.1. Adding a Prospect Agreement: - pending PP

1. Select **Agreements** from the top main menu.

2. You will be presented with the main agreement list screen, which lists all the live and prospect agreements within the software, as per below;

Note: this needs to be changed once PP have provided rights for main users to add a prospect agreement



Id	Identifier	Company	Status	Primary User	RBO Level	End Date
38	TEST1012	A A Manufacturing Ltd	Prospect	Catherine Parker	0.00	14/10/2012
39	TEST1013	A A Manufacturing Ltd	Prospect	Catherine Parker	0.00	14/10/2012
28	Y1111100000	A-Z Taxi's Ltd	Live	Janine Hollier	85192.60	18/01/2011
33	IMPORT101	ABC University	Live	John Ross	16044.58	01/11/2012
22	111209AL	Adva Logistics Ltd	Live	Shelley Thompson	47557.12	15/12/2010
6	119123980	Alpha Media Ltd	Live	Mark Gilson	13202.63	01/07/2010
8	0000/123	AT Manufacturing	Prospect	Reece Ashworth	0.00	14/01/2014
19	111209BF	Barkers Financials Ltd	Live	Charlotte Smith	170058.13	01/09/2010

3. Click **Add Agreement**

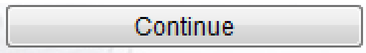
4. You will then be presented with the 'Add a New Agreement' screen as per below;

Note: the below image needs to be changed once PP have completed access rights for main users to add agreements

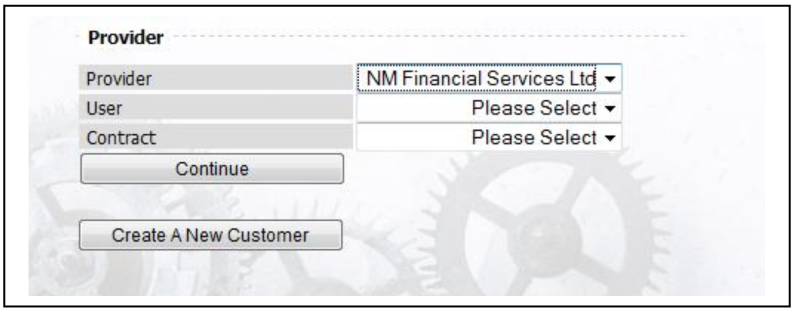
5. Complete the following details from the drop down boxes;

Note: The Company and User needs to be set up on the system prior to adding an agreement. Click ‘Create a New Customer’ and ‘Create a new User’ *** PP TO ADD THE SECOND BUTTON THEN NEED SCREEN SHOTS**

- **Customer**
- **User**
- **Provider**

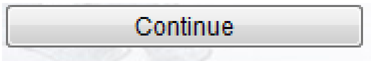
6. Then click 

7. You will then be presented with the following additional drop down menu boxes;



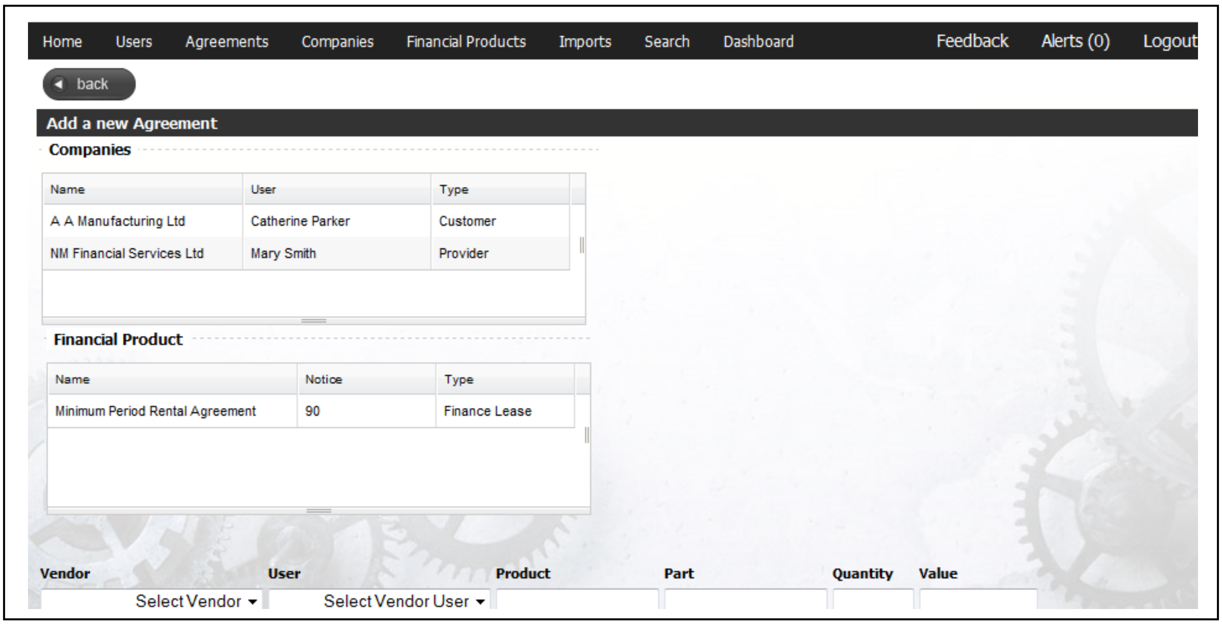
8. Complete the following drop down menus;

- **User**
- **Contract**

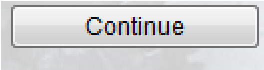
9. Click 

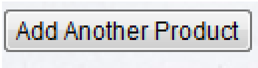
10. The companies (Provider and Customer) will then be presented in table format along with the Financial Product below, as indicated;

Note: the below image needs to be changed once PP have completed access rights for main users to add agreements



11. Next, complete the Vendor and User (if known), product name and/or part number, quantity and value.

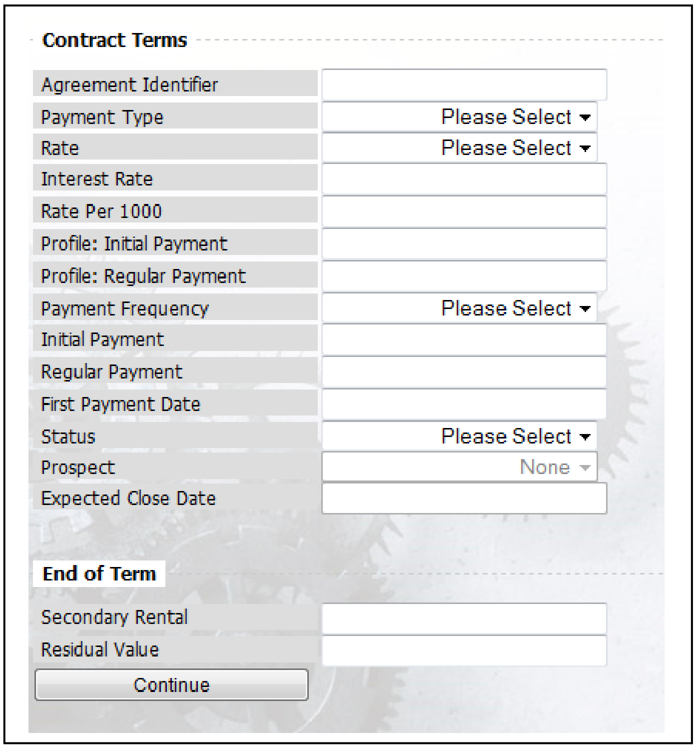
12. Click 

if complete or 

to add an additional product (repeating previous step).

Note: below screen to be changed once PP have made it so that status is defaulted to ‘prospect’ for all main users.

13. You will then be presented with the ‘Contract Terms’ and ‘End of Term’ as below;

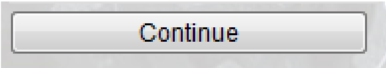


14. Fill in the following details;

- Agreement Identifier (if known)
- Payment Type: Advance or Arrears
- Rate: Interest Rate or Rate per Thousand
- Interest Rate: or
- Rate per Thousand:
- Profile: Initial Payment (whether it’s 1 or 3 payments)
- Profile: Regular Payment (how many remaining payments after initial)
- Payment Frequency: Monthly, Quarterly or Annually
- First Payment Date: (only applicable if live contract)
- Prospect: (appears as an option only when status is set to ‘Prospect’) None, Quote, Proposed, Referral, Accepted, Declined, Purchase Order, Sent for Payment, Win.

- Expected Close Date: (only applicable when Status is a Prospect)

Note: The initial and regular payments will auto populate via Lease-Desk's calculations and the previous information you have entered. In addition, the Secondary Rental and Residual Value will auto populate from the previous figures entered and from the Financial Product details already within the system.

15. Click 

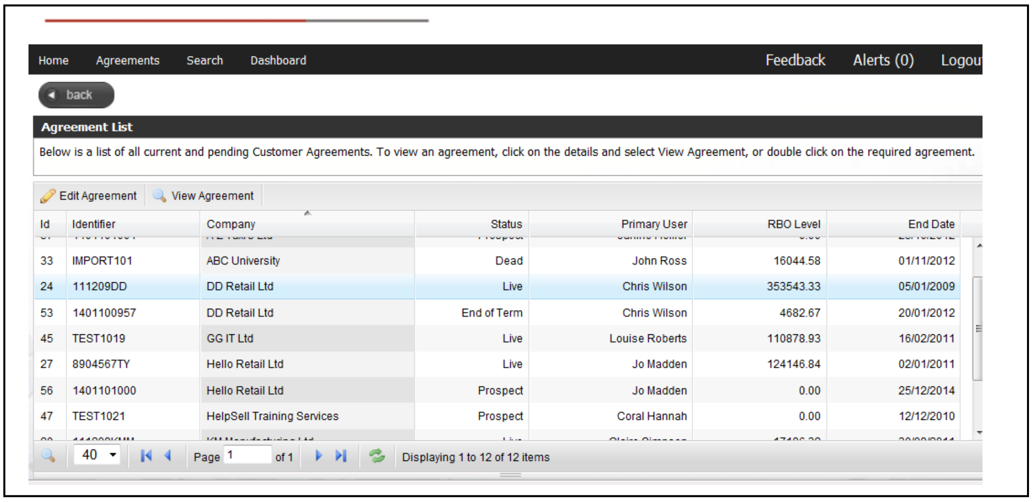
16. You will then be taken back to the main Agreements List and will be presented with the following confirmation message;

(note, need to add this image)

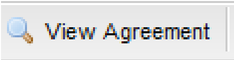
4.2. Viewing an Agreement:

1. From the top toolbar menu, select 

2. You will then be presented with all of the live and prospect agreements for which you are either associated with, or are able to view due to your role status, i.e. Reader or Reader/Writer (Refer to Introduction to Lease-Desk for further information).

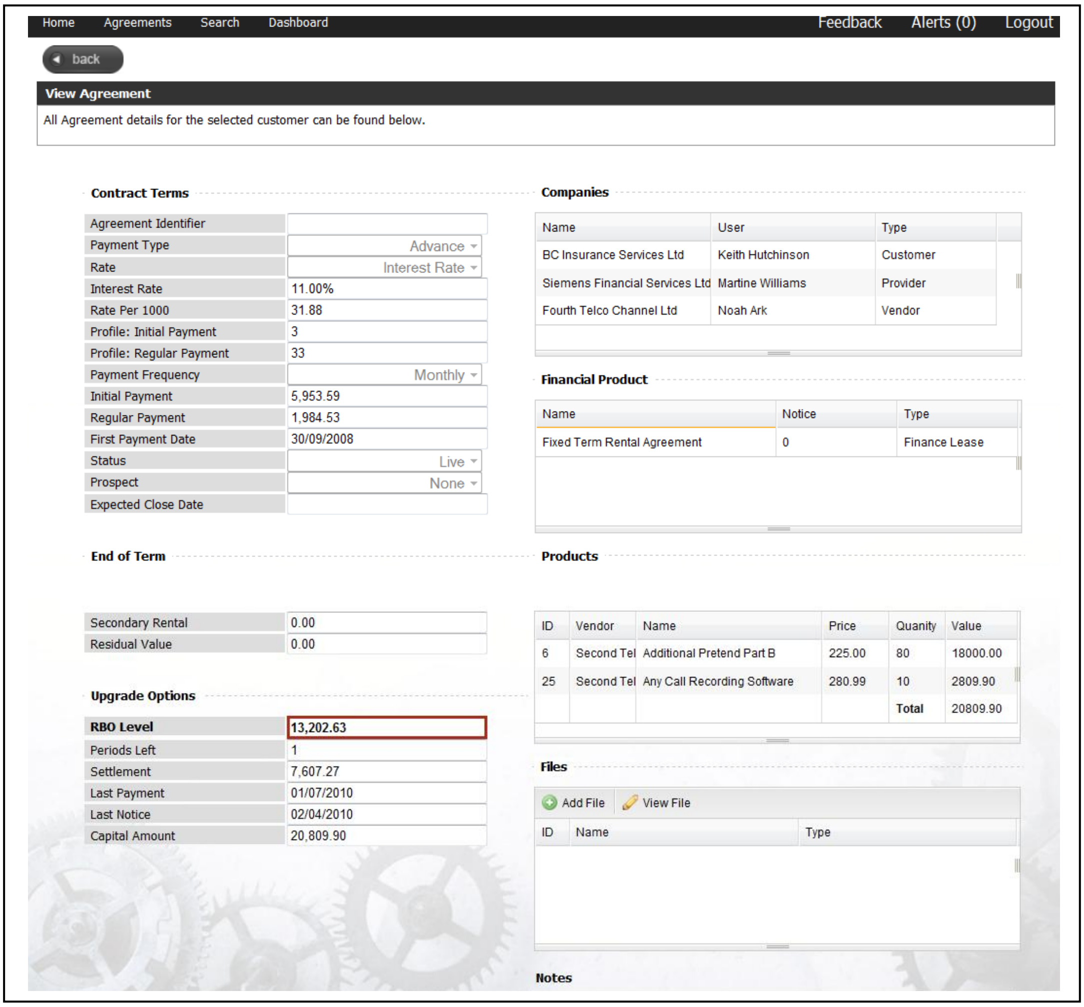


3. Highlight the required Agreement from the main Agreement Lists screen.

4. Click 

5. You will then be presented with the full 'View Agreement Details' screen (as indicated Below);

Note: Within the 'View Agreement' screen you have the ability to edit notes and files, follow the stages within 'Editing an Agreement' on how to do this.



Note: Upgrade Options:

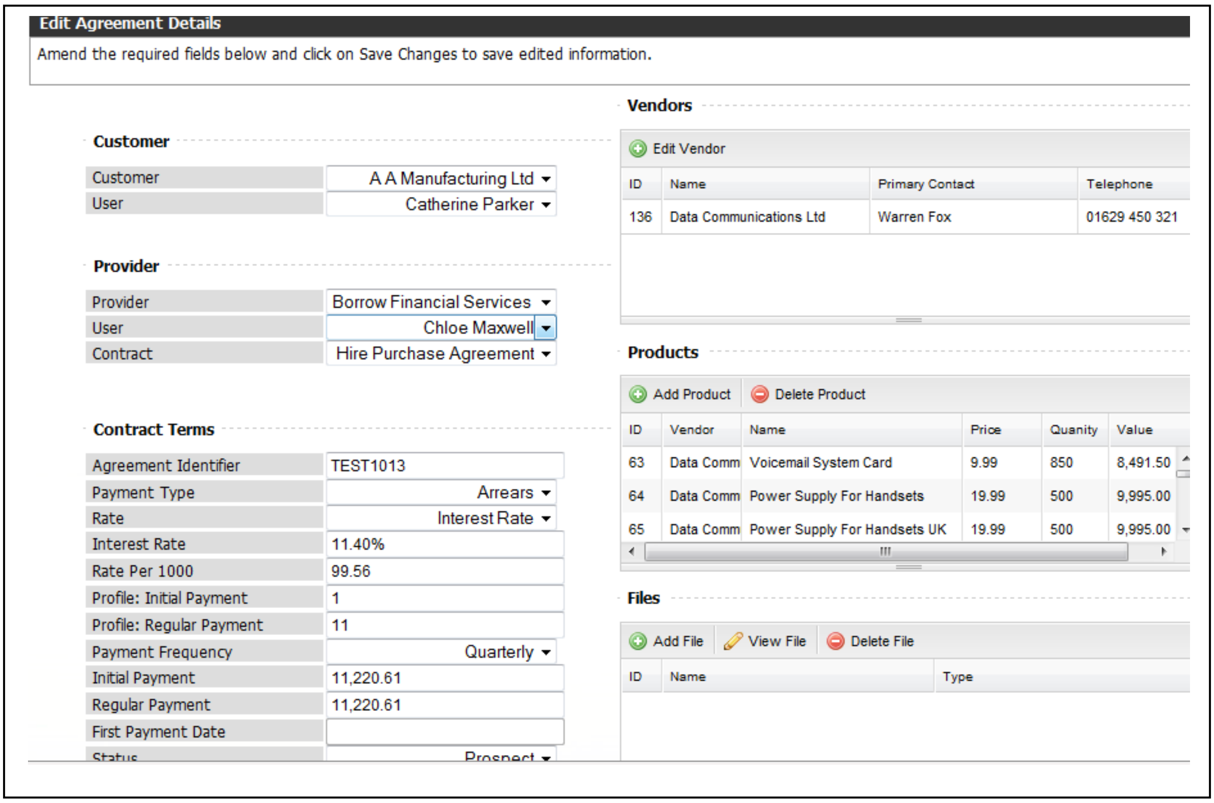
The RBO Level in bold (Repeat Business Opportunity), is the amount the customer has to spend on a technology refresh that will tie them into a new contract with the Vendor for the same length of time as their initial contract.

4.3. Editing an Agreement:

1. From the top toolbar menu, select Agreements

2. Highlight the required agreement and click Edit Agreement

3. You will then be presented with the 'Edit Agreement Details Screen' as per below;



4. You are then presented with various tables you are able to edit, i.e. Contract Terms, Files, Notes, etc.

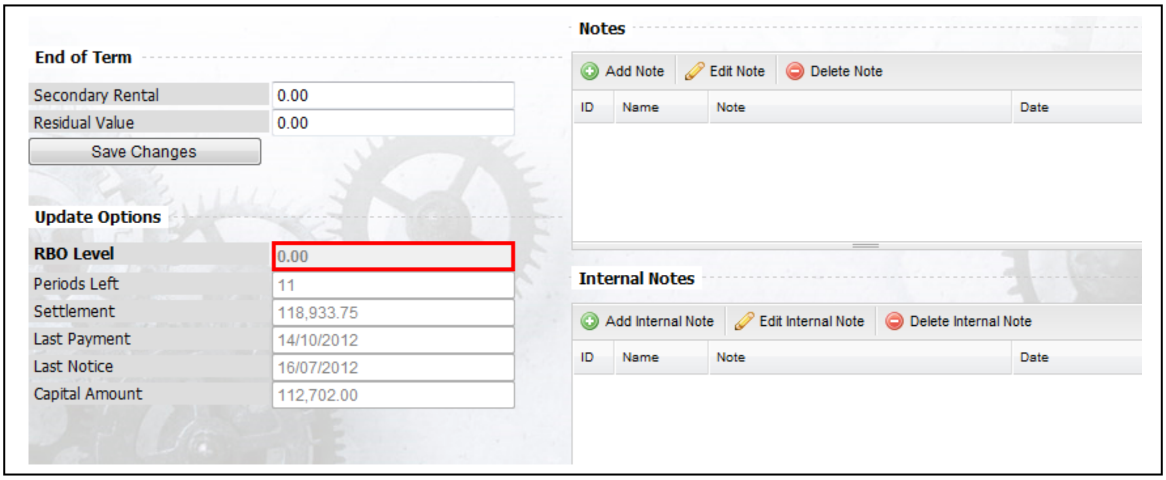
5. Once details have been amended, click Save Changes

4.3.1 Adding and Deleting a Product:

6. To Add or Delete a Product, follow chapter **3.5. Adding, Editing and Deleting Products**

4.3.2 Adding, Viewing and Deleting a File:

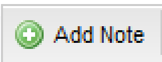
7. To Add, View or Delete a File, follow chapter **3.2. Adding, Editing, Viewing, and Deleting Files:**



4.3.3 Adding a Note:

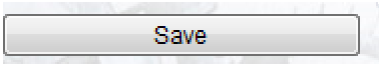
Note: When a note is added to an Agreement, an email alert will get sent to all members within the alerting group with the details.

1. Within the main ‘Edit Agreement’ screen, go to the Notes table.

2. Click 

3. You will then be presented with the following ‘Add Note’ screen;

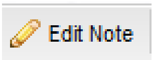
3. Type your message into the blank box

4. Click 

5. You will then be taken back to the main ‘Edit Agreement’ screen.

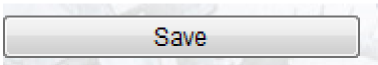
4.3.4 Editing a Note:

1. Highlight the required note from the Notes Table on the Edit Agreement screen.

2. Click 

3. You will then be presented with the ‘Edit Note’ Screen as per below;

3. Amend the Message

4. Click 

5. You will then be taken back to the main 'Edit Agreement' screen.

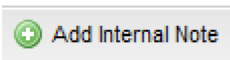
4.3.5 Deleting a Note:

1. Highlight the required note from the Notes Table on the Edit Agreement screen.

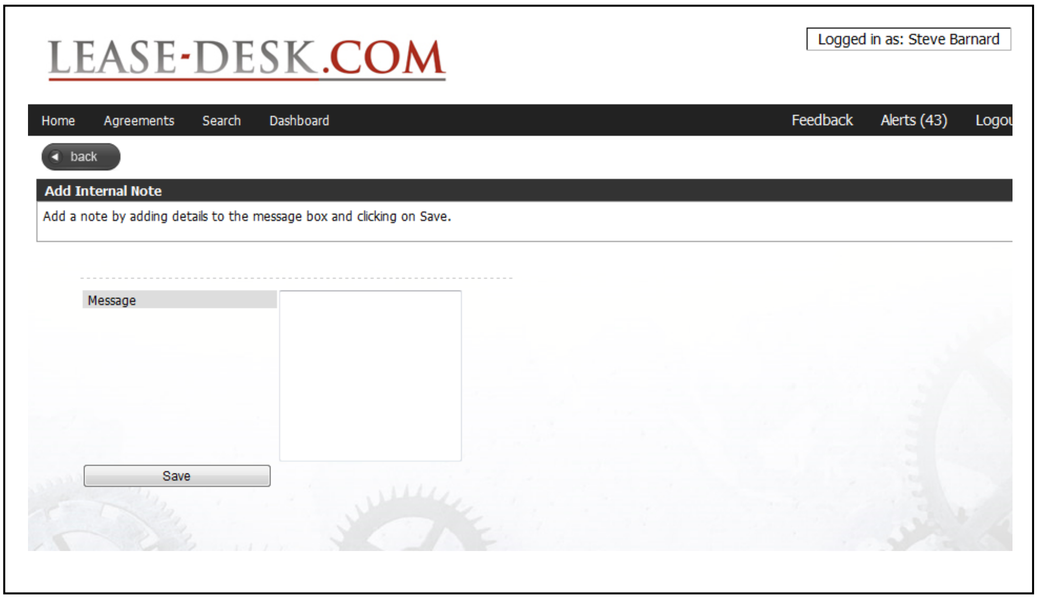
2. Click 

4.3.6 Adding an Internal Note:

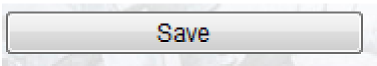
1. Go to the Internal Notes table within the 'Edit an Agreement' screen.

2. Click 

3. You will then be presented with the following 'Add Internal Note' screen;



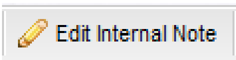
4. Enter your message in the box.

5. Click 

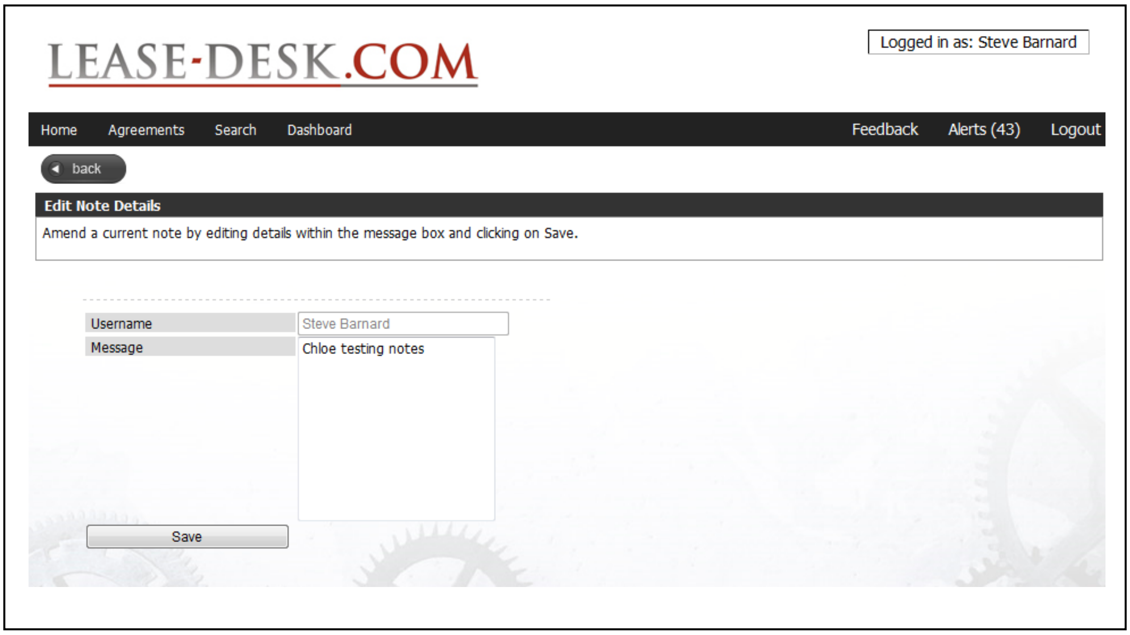
6. You will then be taken back to the main 'Edit Agreement' Screen.

4.3.7 Editing an Internal Note:

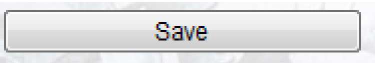
1. Highlight the required note from the Internal Notes Table on the 'Edit Agreement' screen.

2. Click 

3. You will then be presented with the 'Edit Internal Note' screen as per below;



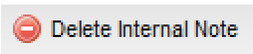
4. Amend the required message.

5. Click 

6. You will then be taken back to the main ‘Edit Agreement’ screen.

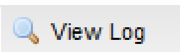
4.3.8 Deleting an Internal Note:

1. Highlight the required note from the Internal Notes Table on the ‘Edit Agreement’ screen.

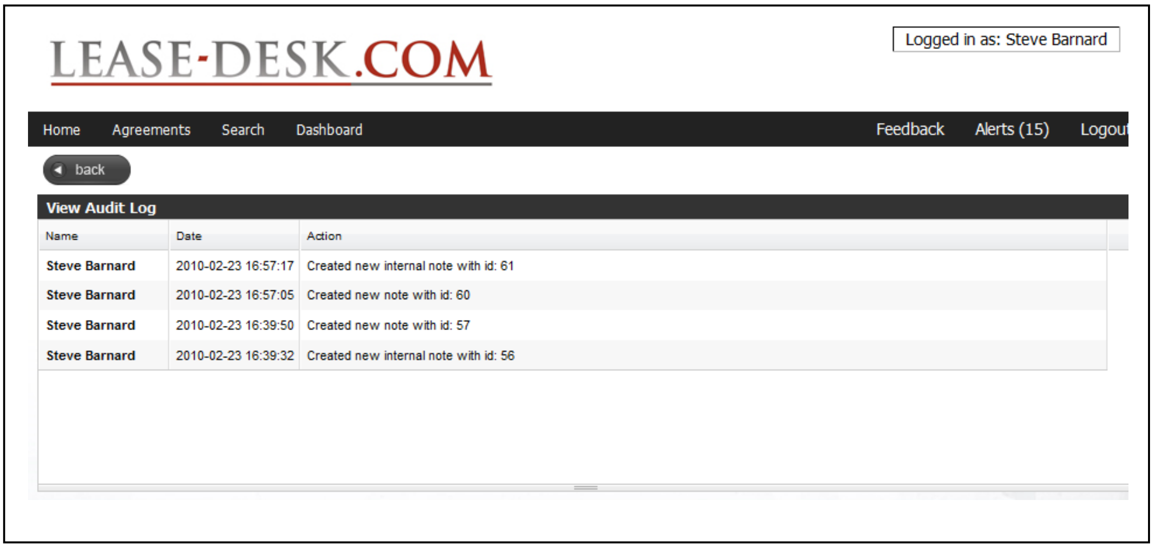
2. Click 

4.4. Viewing an Audit Log:

1. Highlight the required Agreement from the main Agreement Lists screen as indicated previously.

2. Click 

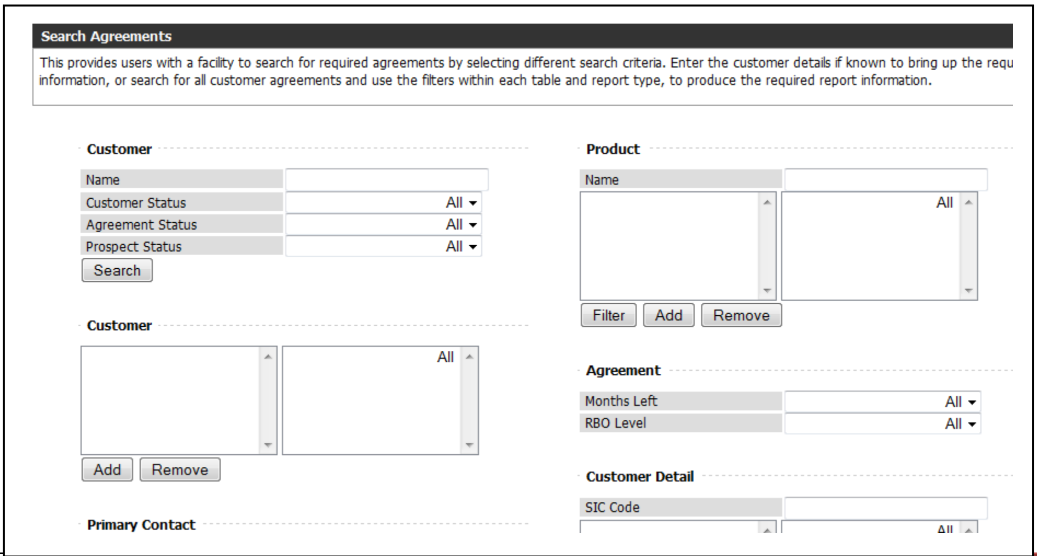
3. You will then be presented with the 'View Audit Log' screens which details all user action against the selected Agreement, as indicated below;

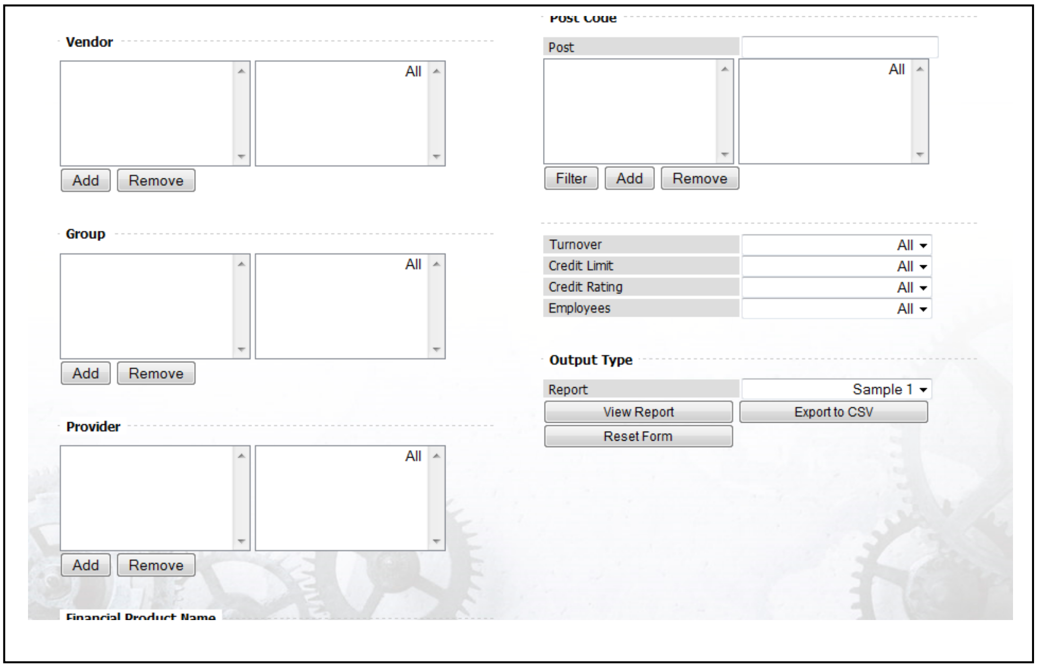


5.0 Search:

1. Go to **Search** on the top main menu.

2. You will be presented with the 'Search Agreements' screen as indicated below in two parts;

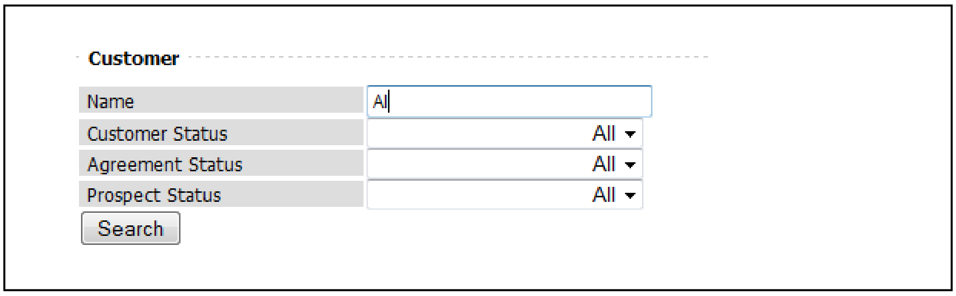




3. The Search Agreements screen, allows you to search for all agreement information, that you have access to (determined by role type), by using the different filters.

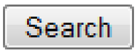
5.1. Searching for Specific Customer Agreement Information:

a. From the main 'Search Agreements' screen as indicated previously, enter the full or first few letters of the company name you are looking for, as per below.

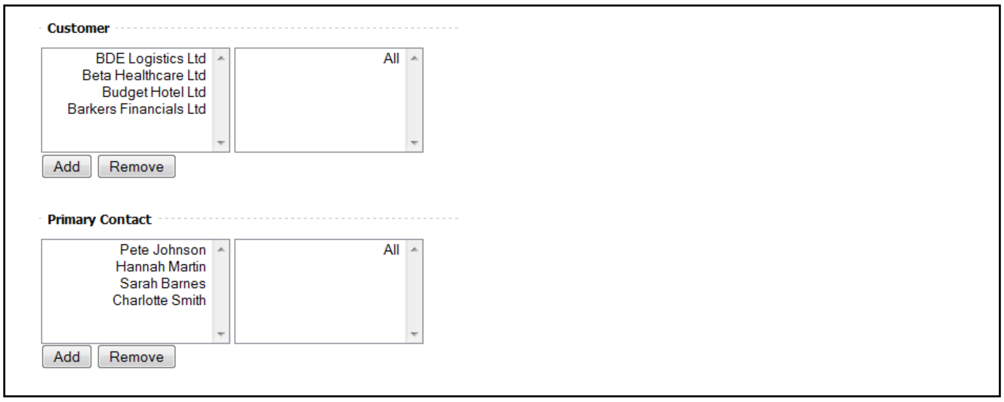


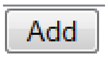
b. Complete the following details if required/known or keep as All;

- Agreement Status
- Prospect Status (if previous Status is set to Prospect)

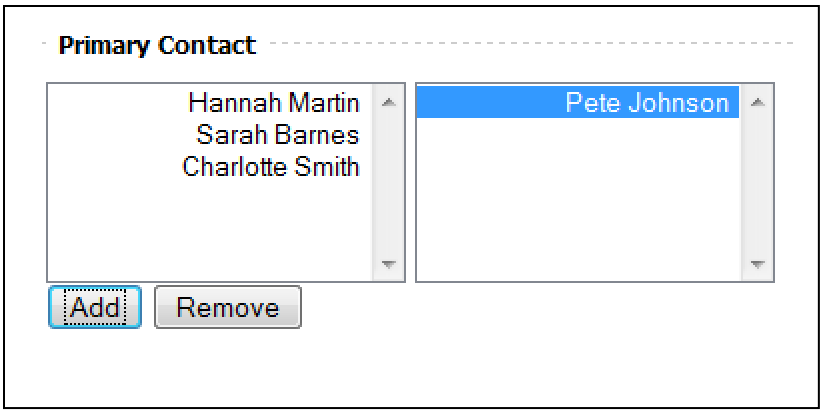
3. Click 

4. The company agreement information relating to the inputted information will then be displayed in each of the filter tables, as indicated in the example below;



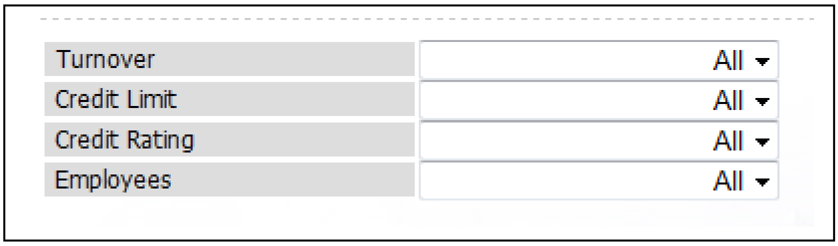
5. To include any of the produced data, within each table, highlight the required data, i.e. Primary Contact, and then click 

6. The data will then be moved into the second box as indicated below;

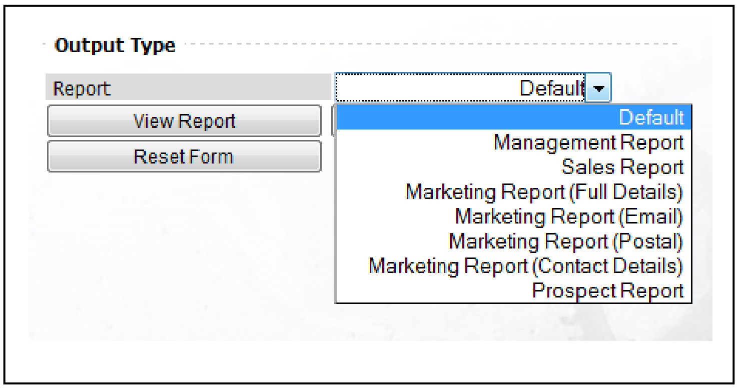


7. Carry on with each table required, following the previous step.

8. You will reach the following drop down options at the bottom of the search screen. If required, select an option from each;



9. Go to the ‘Output Type’, and select a report type from the drop down menu.



Note: There are seven different report types available, all of which provide different detailed information. These are broken down below;

1. **Management Report:** Customer Name, RBO Level and Internal Agreement ID, Primary Vendor.

2. **Sales Report:** Vendor, Vendor Contact, Customer, Customer Contact, Customer Telephone, Postcode, Agreement ID, RBO Level, Term, Periods Remaining.

3. **Marketing Report (Full Details):** With all details listed below.

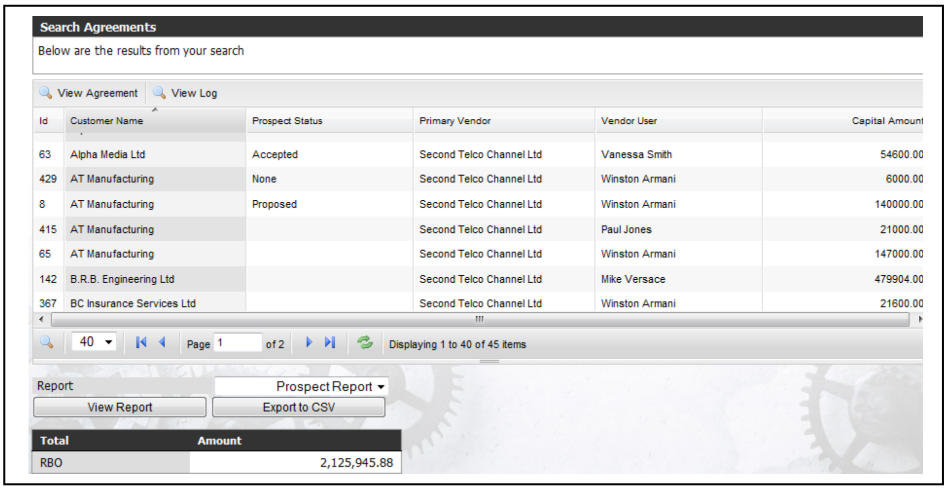
4. **Marketing Report(Email):** Customer Name, Primary Vendor, SIC Code, Turnover, Postcode, Primary Customer Contact, Primary Vendor, Primary Customer Email.

5. **Marketing Report (Postal):** As above, minus email but with full address details.

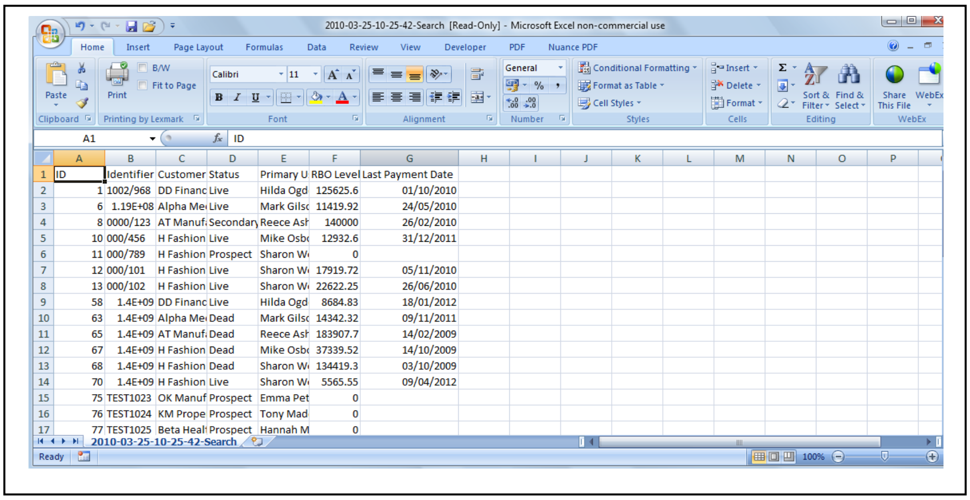
6. **Marketing Report (Contact Details):** As above, minus address but with Phone Number. Go to the ‘Output Type’, and select a report type from the drop down menu.

7. **Prospect Report:** Customer Name, ID, Prospect Status, Primary Vendor, Vendor User, Capital Amount.

10. Once the report type has been selected, click on View Report to receive the following page;



or Export to CSV to view in CSV format as per below;



5.2. Searching for all Customer Agreement Information:

1. From the main ‘Search Agreements’ screen as indicated previously, leave the Customer name, field blank and Status and Prospect Status set to ‘All’

2. Click Search

3. As indicated in previous steps, select any of the information using filters or leave as 'All'.

4. Follow the previous step 9 on how to select report type and view data.

6. Dashboard:

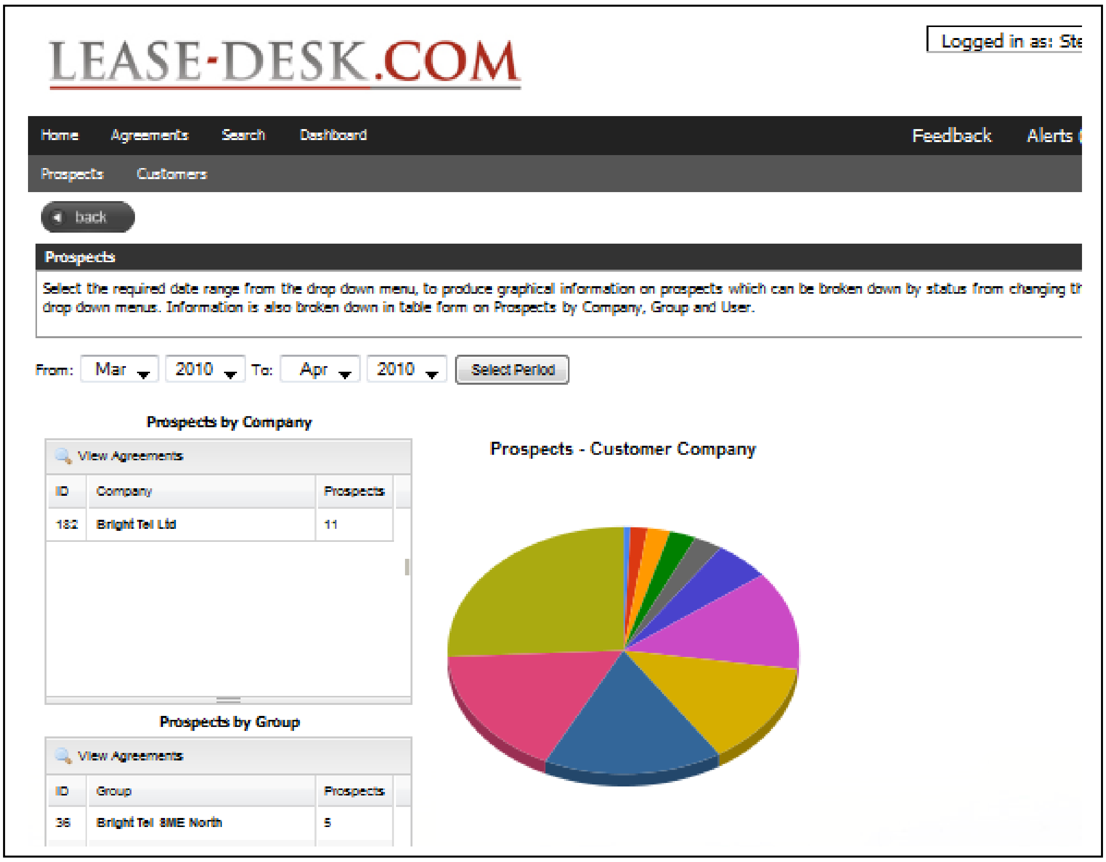
This screen provides users with a snap shot all organisational live and Prospect agreement information determined by role type.

6.1. Prospects:

Note*:* This page will produce a table when data is available by filtering with prospect type and grouping (user, group or Company).

1. Go to Dashboard on the main top menu.

2. You will automatically be presented with the default 'Prospect' page, which includes Prospects by Company, Prospects by Group and Prospects by User, and a graph showing all figures, as indicated below;



3. From the date range at the top of the page, select the required date and click Select Period

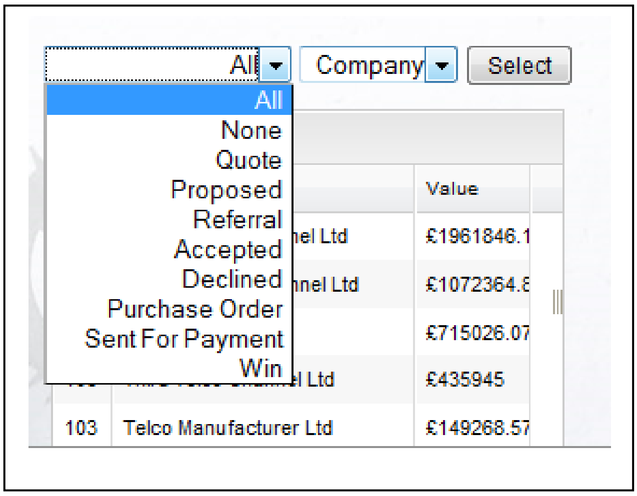
4. The data and graph presented on the page will then change as a result of the date ranges selected.

5. To view any of the information in the tables shown, highlight the required line of information and click View Agreements

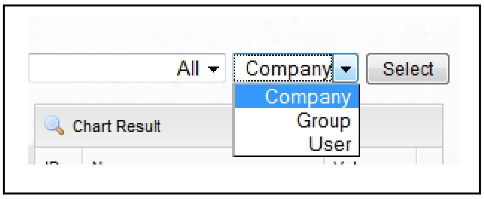
6. Alternatively, double click on the required line.

6.1.1 Viewing Top Prospect Information in Graphical Format:

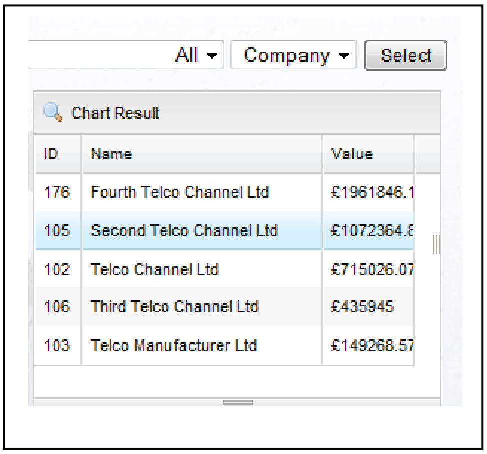
1. Go to the first drop down box underneath the graph and select the required option, as indicated below.



2. Select either User, Group or Company from the second drop down menu box.



3. You will then be presented with the required information within the table below.

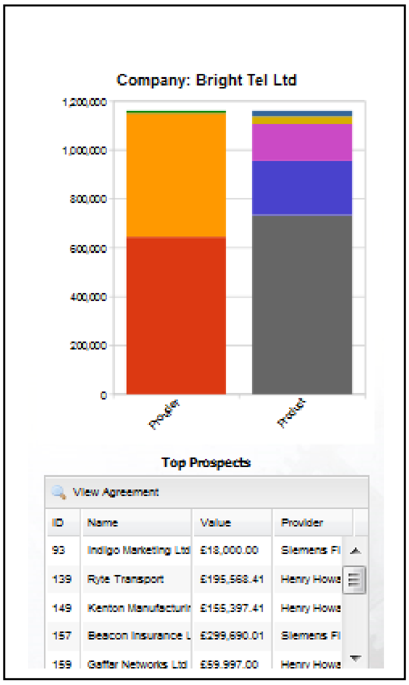


4. Highlight the individual line of information required; Company, User or Group.

5. To view the information in graphical format, click Chart Result

6. You will then be presented with the Top Prospect information as indicated below;

7. To see the legend, hover over the diagram with your mouse.



7. To View the Agreement information, highlight the line in the table below the graph and click View Agreement

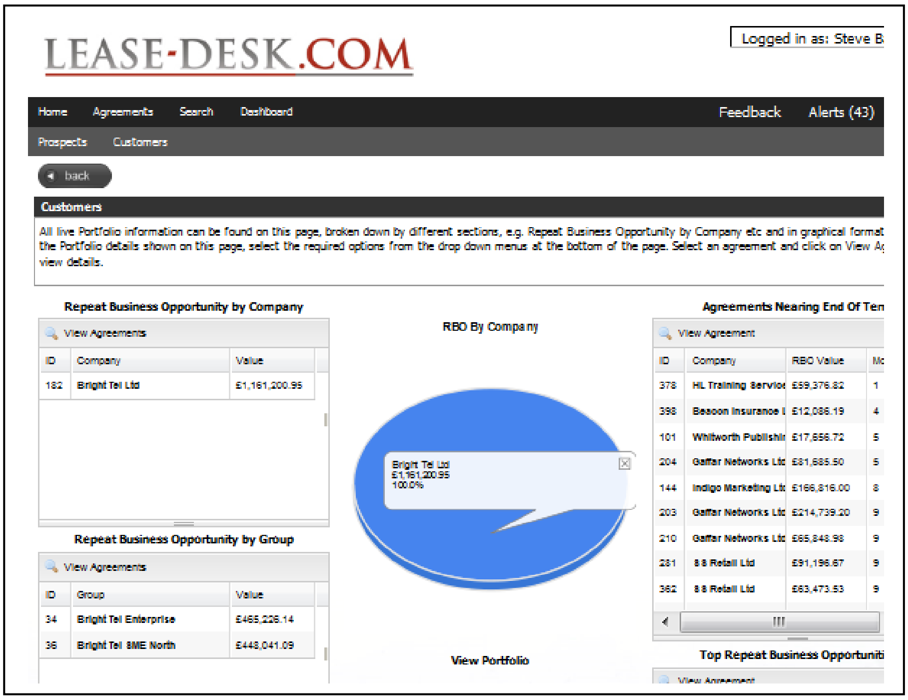
8. You will then be taken to the 'View Agreement' screen for the selected Agreement.

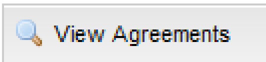
6.2. Customers:

1. Go to Customers at the top left hand side of the Prospects screen within Dashboard.

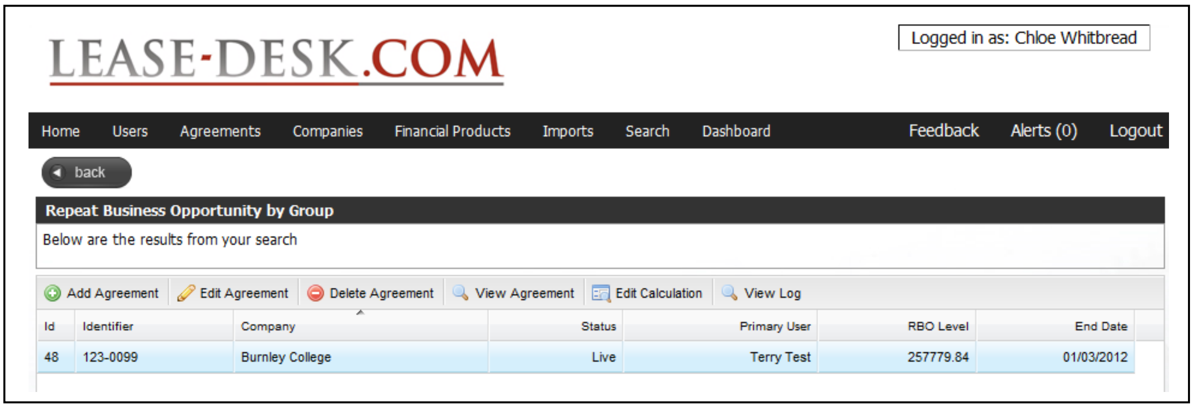
2. You will then be presented with the main Dashboard screen for customers, as indicated below. This shows a snapshot of all live customer agreement information broken down by;

- **Repeat Business Opportunity by Company**
- **Repeat Business Opportunity by Group**
- **Agreements Nearing End of Term**
- **Top Repeat Business Opportunities**
- **Repeat Business Opportunity by User**

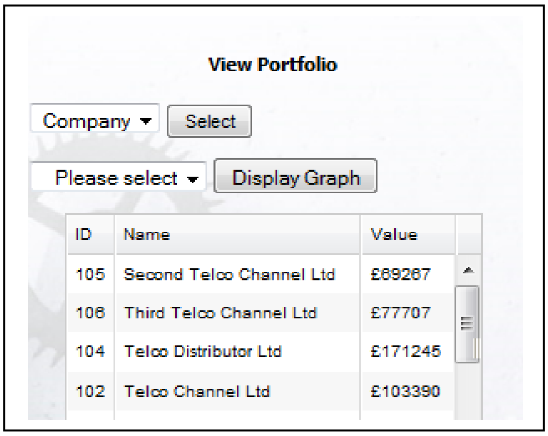


3. To view any of the individual agreement information within any of the tables as indicated above, highlight the relevant line within the table and click 

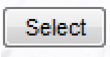
4. Dependant upon which option you select, you will then be presented with the individual Agreement Information in table format, as indicated below;



1. At the bottom of the Customer Dashboard screen, go to 'View Portfolio' as indicated below;

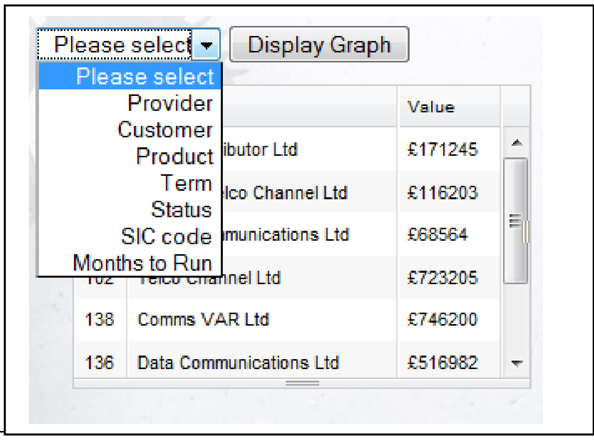


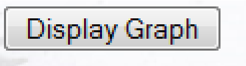
2. In the first drop down menu, select the required grouping option (Company, Group or User).

3. Click 

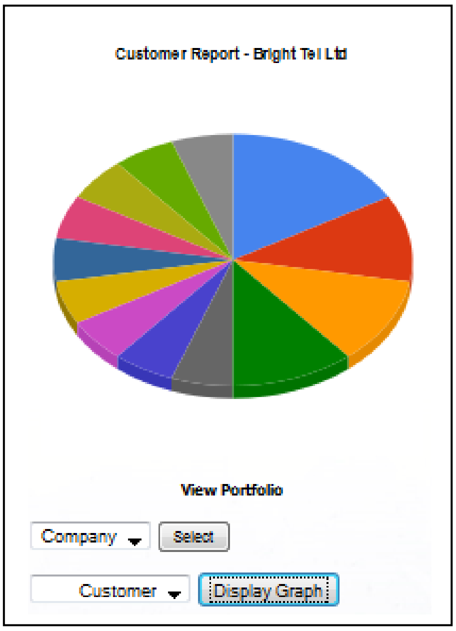
4. The information will then be presented in table format below.

5. Next select the Agreement grouping from the drop down menu, as indicated below;



6. Highlight the required row from the table and click 

7. The information will then be shown in graphical format as indicated below;



7. Alerts:

Part of Lease-Desk's functionality is to send automatic email alerts to vendor users (Normal and Main) and administration users. As main user, dependant on your defined role, you will be able to see all of the system generated alerts associated with your viewable agreements or teams agreement information.

Please note: The alert triggers below will also be generated to all members higher up within your organisational hierarchy that have visibility to individual or group agreement information.

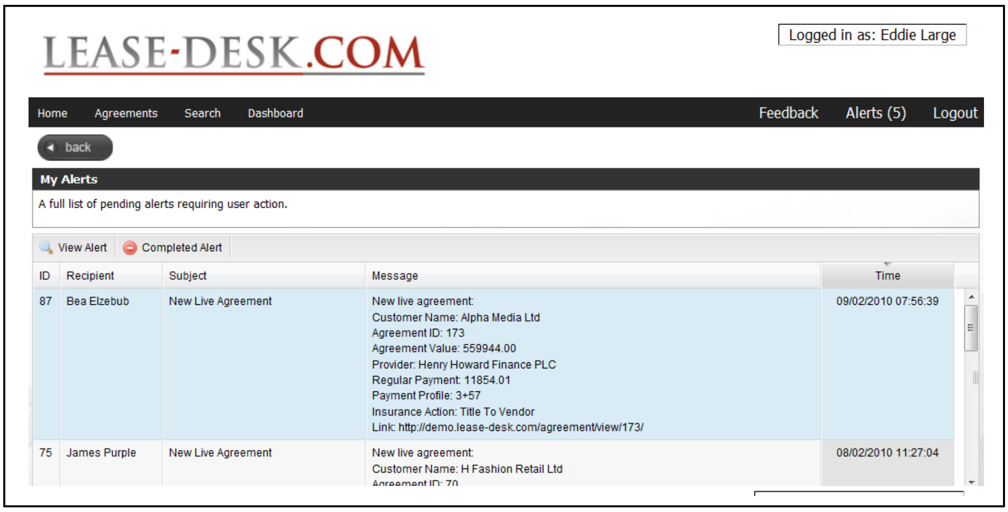
The Alert Triggers are as follows;

- When a new Agreement is added to the system as a live, or Prospect contract.

- When a Prospect changes to a live customer (The vendor will be emailed to send insurance details).
- When a Prospect or Live Agreement Milestone Changes.
- When an Agreement reaches half way through the term, 12 months to run, 9 months to run, 6, 5, 4, 3, 2, and 1 month left to run.
- When an Agreement reaches one month before the end of term, in order to notify customer of notice in writing to the Financial Provider.
- Monthly Live Agreement RBO values.
- When an agreement with a Minimum Period Financial Product reaches the end of term and the last payment date, and it hasn't been manually changed, the status will change to 'Secondary Period' as the status. If it's a Fixed Period, it moves to 'End of Term'. Therefore emails and system alerts will also be generated upon Default, Secondary Period and End of Term.

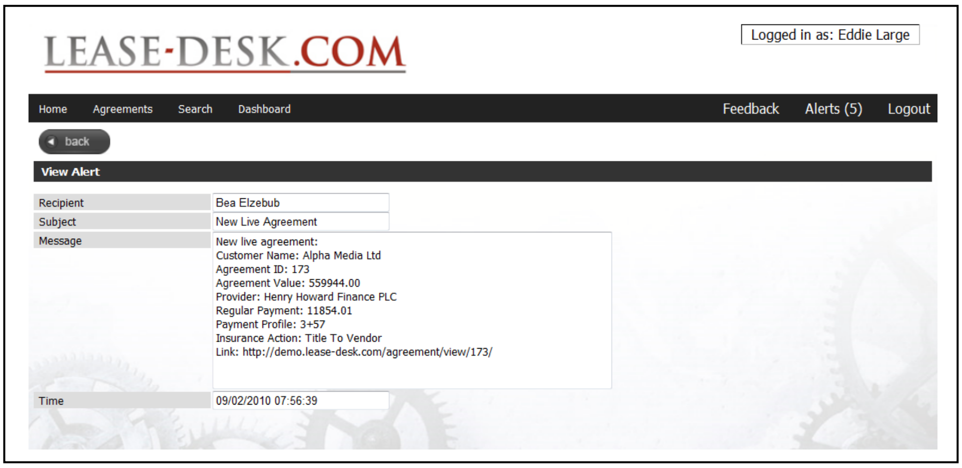
1. To view your individual or team user alerts, select Alerts (0) from the top menu.

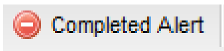
2. You will then be presented with the following 'My Alerts' screen as per the following page;



3. To view an alert, highlight the required alert and click View Alert

4. You will then be presented with the following screen;



5. Once the alert has been read and the action has been taken, click 

8. General Functionality:

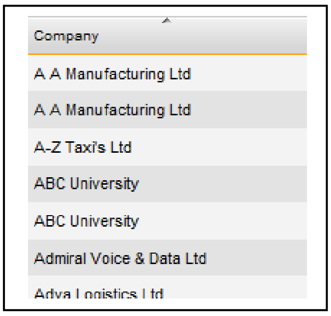
8.1. Sort:

Within Lease-Desk, within any of the main tables, for example Companies, Users, Financial Products, is the ability to ‘Sort’ each column of information in alphabetical or numerical order by the column heading.

1. To sort a table using the headings of the columns to show the tables contents is alphabetical/numerical order click on the column title.

Before Sort

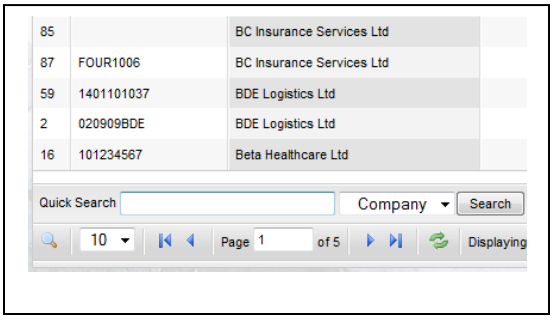
After Sort



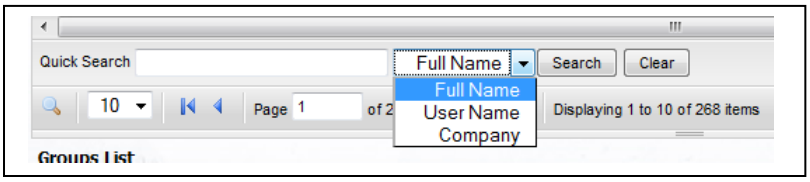
8.2 Quick Search:

Within Lease-Desk is a 'Quick Search' functionality within the majority of main tables, for example, Companies, Users, Groups etc, allowing easy access to the required information.

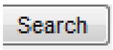
1. To user the quick search functionality, at the bottom of the screen, select the  icon.

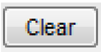


2. This will then bring up the quick search options for the screen you are in, as per below;



3. Enter the search information and select an option from the drop down menu as indicated above.

4. Click  to search for the information

5. Click  to start from the beginning.

8.3 Refresh:

1. To refresh the information listed in any of the tables, select 

8.4 Scrolling through records:

1. To scroll forwards and backwards through any of the records listed within the tables on each screen, select the following options;

 Forward to next page of records

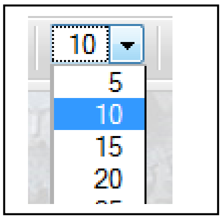
 Forward to end of records

 Go back to previous page of records

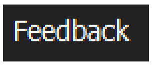
 Go to the start of the records

8.5 Changing the amount of records per view:

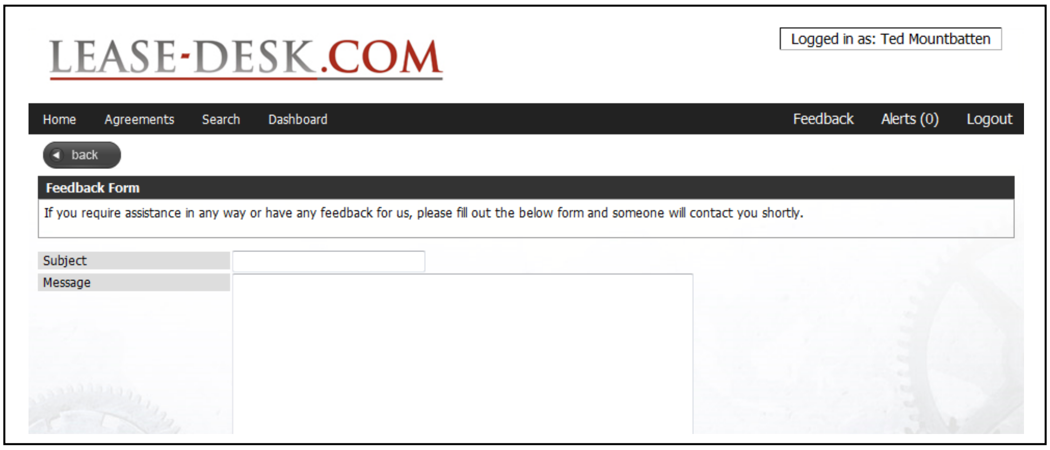
2. At the bottom of each table, select the drop down list to change the number or records viewed on a page at a time, as per below.



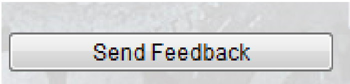
9. Feedback:

4. To contact Proctor Consulting's Lease-Desk administration team with any feedback, query or issue, from the main menu select 

5. You will then be presented with the 'Feedback Form' screen as indicated on the following page;



6. Add a Subject Title and complete the message detail box.

7. Once completed, click 

8. You will then be presented with the following confirmation message;

9. An email will then get sent to the Administration Team, and someone will contact you in due course.

10. Contact Details:

If you require any additional Lease-Desk information please contact us at;

Proctor Consulting UK Ltd,
Lakeview Drive,
Sherwood Business Park,
NG15 0DT

Switchboard: 01302 245310
Email: info@Lease-Desk.com
www.Lease-Desk.com