

LEASE-DESK

Normal Access User Manual

Version 2.1



DRIVING
SALES AND
PROFITABILITY

Table of Contents:

2. Logging into Lease-Desk:.....	5
3. Home Screen: Adding, & Viewing	6
3.1. Adding and Viewing Files:	7
3.1.1. Adding a File:.....	7
3.1.2. Viewing a File:	8
4. Agreements Screen: Viewing, Adding Notes, and Viewing Audit Log	9
4.1. Viewing a Live or Prospect Agreement:.....	9
4.1.1 Calling or Emailing a Primary Contact:.....	12
4.1.2 Creating Follow Ups.....	13
4.1.3 Adding and Viewing a File:	15
4.1.4 Viewing a Note:.....	16
4.1.5 Adding a Note:	16
4.1.6 Summarising Notes.....	17
4.2. Viewing an Audit Log:	18
5.0 Search:.....	19
5.1. Searching for Specific Customer Agreement Information:.....	21
5.2. Searching for all Customer Agreement Information:	24
6. Dashboard:.....	27
6.1. Prospects:.....	27
6.1.1 Viewing Top Prospect Information in Graphical Format:	29
6.2. Customers:	31
6.2.1 Viewing/Amending Portfolio Information:	33
7. Alerts:.....	34
8. General Functionality:.....	37
8.1. Sort:.....	37
8.2 Quick Search:	38
8.3 Refresh:	39
8.4 Scrolling through records:.....	39
8.5 Changing the amount of records per view:	39
8.6 Last 10 Records:	40

9. Feedback:	40
11. Contact Details:	43

1. Introduction to Lease-Desk:

Lease-Desk is a Portfolio Management System designed specifically by Proctor Consulting which provides a dedicated platform for 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 users 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.

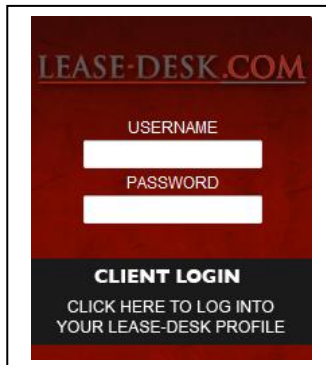
The following user guide is aimed at all 'Normal' Access Users who have been set up with a Lease-Desk Account. As a Normal user you will have Reader, Writer or Reader/Writer access rights to the groups that you have been set up in by the administrators.

The terminology for all role types is defined below;

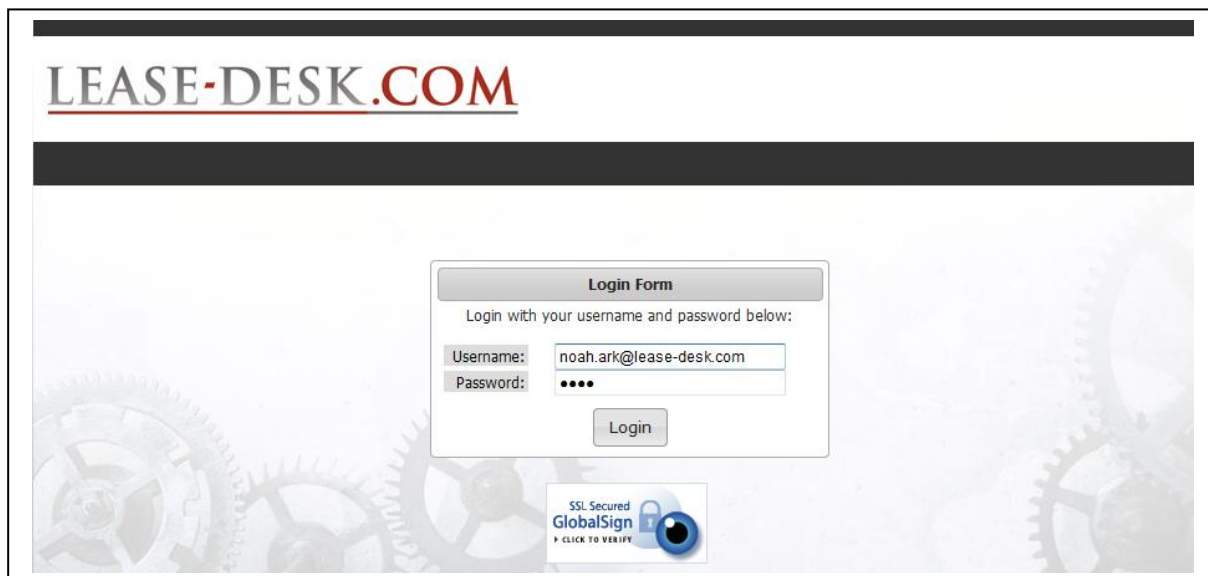
- **Reader:** You can read (or view) all of the live and pending agreement information for the groups that you are in.
- **Writer:** You can view all of your agreements that you are associated with however you will not see any other member's agreement information.
- **Reader/Writer:** You can view the live or pending agreement information for the teams that you are in and also add agreement information to the groups that 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, & Viewing

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

LEASE-DESK.COM

Home | Agreements | Search | Dashboard | Alerts (50)

back

Company Details

Welcome to Lease-Desk. This page details all the Company Information, for example Addresses, Users etc.

Company Information

Name: Fourth Teloo Channel Ltd

Save Changes

Company Type: Vendor
 SIC Code: (6420) TELECOMMUNICATIONS
 Registration Number: N/A
 Turnover: 250000.00
 Employees: 130
 Credit Rating: 07
 Credit Limit: 65000
 Analysis Date: 21/09/2009

Addresses

ID	Name	Address	Post Code	Telephone
176	Head Office	Unit 3 Any Business	NG17 5JN	0115 963852

Files

Add File View File

ID	Name	Type
45	user test.csv	Audited Accounts
44	P3.jpg	Management Accounts

Groups

ID	Name
25	Eddie Large
27	4th Teloo Channel Enterprise

Providers

ID	Company ID	Name
21	100	Siemens Financial Services Ltd

Groups

ID	Name
25	Eddie Large
27	4th Teloo Channel Enterprise
28	4th Teloo Channel SME

Providers

ID	Company ID	Name
21	100	Siemens Financial Services Ltd
20	101	Henry Howard Finance PLC
67	130	NM Financial Services Ltd
68	131	Lend Finance PLC

Users

ID	User Name	Full Name	Job Title	Type
320	noah.ark@lease-desk.com	Noah Ark	Account Manager SME Sales Team	Normal
315	john.baptiste@lease-desk.com	John Baptiste	Managing Director	Main
321	bea.elzebub@lease-desk.com	Bea Elzebub	Account Manager	Normal

Products

Print Products

ID	Part Number	Name	Manufacturer
2363	85777548	JC Power Converter (NA)	Teloo Manufacturer Ltd

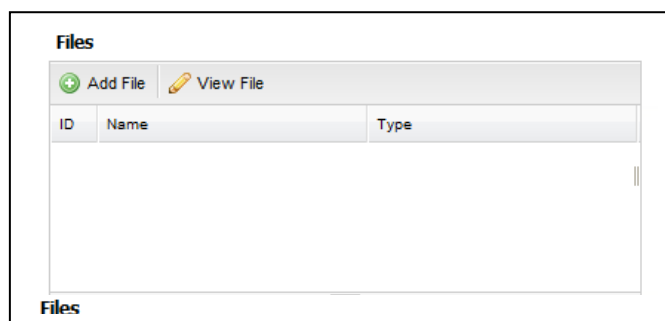
2. This screen details information relating to your company such as Addresses, Files, Users, Products and Providers (if you are a Vendor), Groups (if you are a Vendor) and Financial Products (if you are a Financial Provider).

3.1. Adding and Viewing Files:

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

3.1.1. Adding a File:

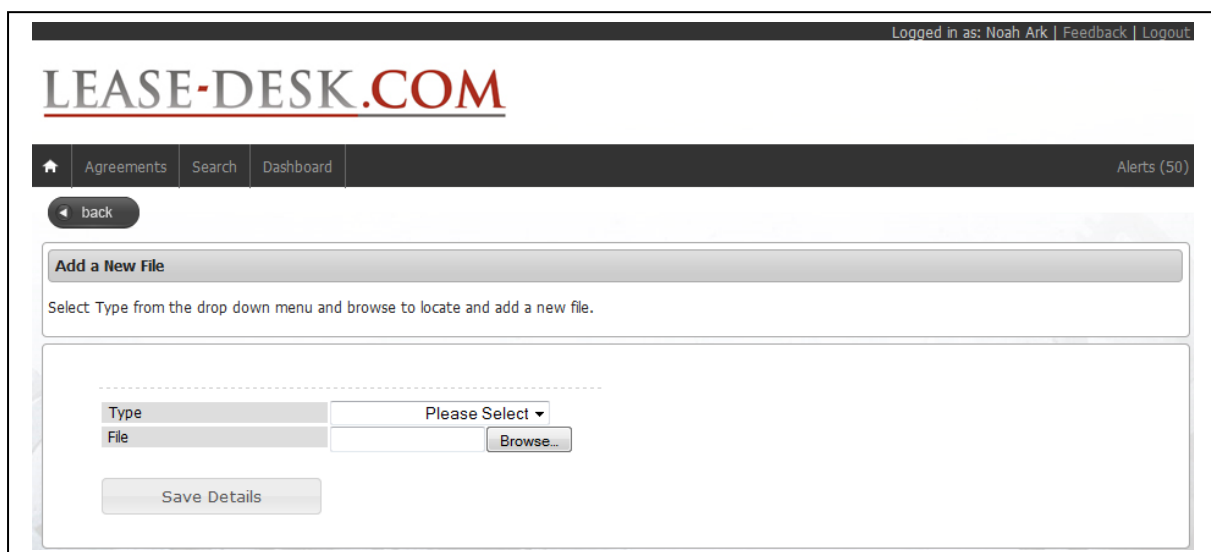
1. Go to the Files table within the homepage, as indicated below;



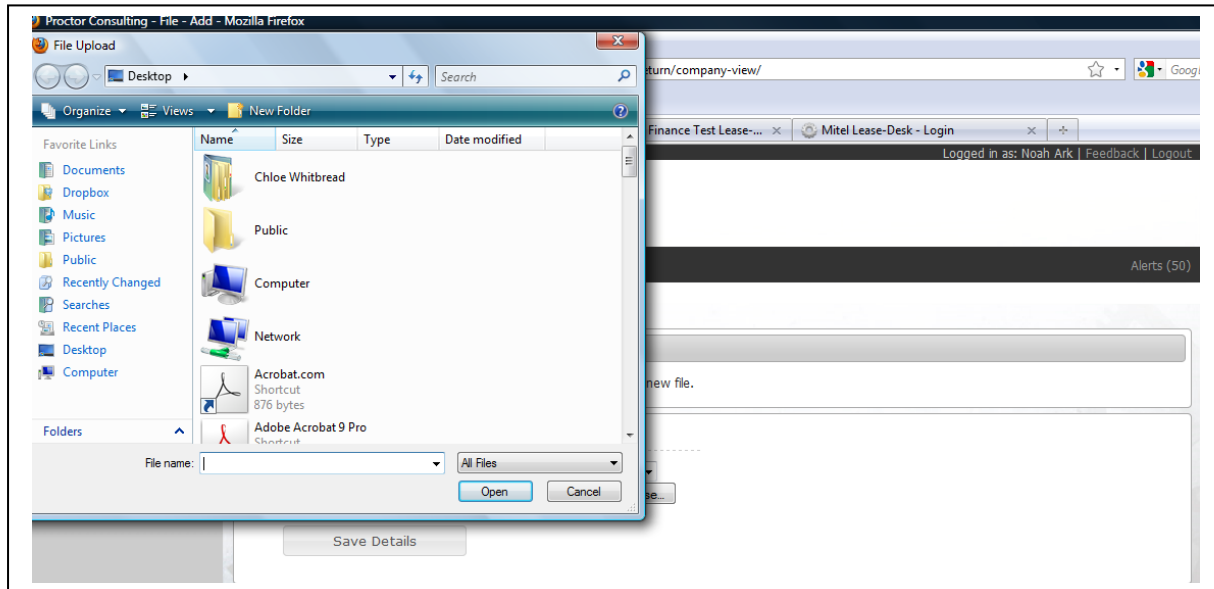
2. To add a file against your Company Details, click



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

Save Details

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

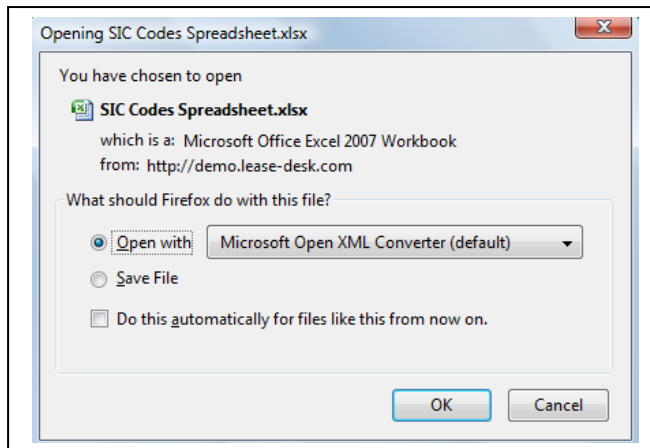
Uploaded file

3.1.2. 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 the file required.

2. Click 

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

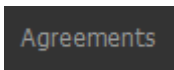


4. Click  to view the file.

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

4.1. Viewing a Live or Prospect Agreement:

1. From the top toolbar menu, select

The image shows a dark grey rectangular button with the word 'Agreements' in a light grey sans-serif font.

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 Chapter 1: Introduction to Lease-Desk for further information).

This is indicated on the following page.

LEASE-DESK.COM

Agreements Search Dashboard Alerts (50)

back

Agreement List

Below is a list of all current and pending Customer Agreements. To view an agreement, click on the details and select View Agreement, or double click on the required agreement.


View Agreement View Log Summarise Notes

Id	Identifier	Company	Status	Primary User	RBO Level	End Date
1117		A A Manufacturing Ltd	Prospect	James Cook	0.00	
85		BC Insurance Services Ltd	End of Term	Keith Hutchinson	62250.00	01/09/2010
275	CMW05	BDE Logistics Ltd	Live	Pete Johnson	239148.55	30/10/2010
175	000/029	BDE Logistics Ltd	Live	Pete Johnson	592840.01	30/01/2011
725		Beta Healthcare Ltd	Live	Hannah Martin	3866.47	01/01/2013
613		Beta Healthcare Ltd	Prospect	Hannah Martin	0.00	
79	FOUR1001	Budget Hotel Ltd	Prospect	Sarah Barnes	0.00	
274	CMW04	CC Retail Ltd	Live	Michael Johns	23998.62	30/08/2012

Quick Search Company Search Clear

10 Page 1 of 3 Displaying 1 to 10 of 21 items

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

4. Click  **View Agreement** or double click with your mouse on the agreement required.

5. You will then be presented with the full 'View Agreement Details' screen.

(This is indicated on the following page).

Customer Information:

This indicates the Credit Limit, Credit Rating and Analysis Date for the end Customer, all of which is taken from Credit Safe UK.

Contract Terms:

This lists all of the contractual information taken from the Providers T's and C's within the Agreement.

The Status indicates whether it is a Live deal or a Prospect and indicates where the Prospect is within the sales process.

End of Term:

Indicates whether the Financial Product carries secondary rentals and if so what the figure would be.

Companies Information:

This lists all of the companies associated with the agreement, i.e. end Customer, Vendor and Finance Provider along with the Primary Contact for each.

Financial Product Information:

This details the Financial Product information

Upgrade Options:

The RBO (Repeat Business Opportunity) level shown, indicates how much a customer has to spend on technology refresh. **Note this is only available on Live deals.**

Product Information:

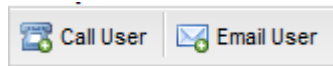
This lists the Product (s) within the agreement.

The screenshot displays the following sections:

- Customer:** Credit Limit: 500.00, Credit Rating: 55, Analysis Date: 05/02/2007.
- Contract Terms:** Internal Agreement Id: 175, Agreement Identifier: 000/029, Equipment Location: 1 Field Street, Payment Type: Affects, Interest Rate: 11.00%, Rate Per 1000: 21.36, Profiles: Initial Payment: 3, Profile: Regular Payment: 57, Payment Frequency: Monthly, Initial Payment: 42,523.10, Regular Payment: 14,174.37, First Payment Date: 30/04/2006, Status: Live, Prospect: None, Expected Close Date, Acceptance Expiry Date.
- Upgrade Options:** RBO Level: 621,106.23, Periods Left: 3, Settlement: 42,487.71, Last Payment: 30/01/2011, Last Notice: 01/12/2010, Capital Amount: 663,593.94.
- End of Term:** Secondary Rental: 0.00, Residual Value: 0.00.
- Companies:** Table with columns ID, Name, Primary Contact, Type. Data rows: 98 BDE Logistics Ltd (Pete Johnson, Customer), 100 Siemens Financial Services (Martine Williams, Provider), 176 Fourth Telco Channel Ltd (Noah Ark, Vendor).
- Financial Product:** Table with columns Name, Notice, Type. Data row: Fixed Period Rental Agreement (60, Finance Lease).
- Notes:** Table with columns ID, Type, Name, Note, Date. Data rows: 215 External Noah Ark (Updated customer on progre, 17/05/2010 10:19:08), 214 External Noah Ark (Docs received all ok, scan, 17/05/2010 10:18:52).
- Files:** Table with columns ID, Name, Type.
- Products:** Table with columns ID, Vendor, Part Number, Name, Manufacturer, Price, Quantity, Value. Data rows: 838 Fourth Telco Channel Ltd (85777548, JC Power Converter (NA), Telco Manufacturer Ltd, 100,000.00, 6, 600,000.00), 839 Fourth Telco Channel Ltd (65889221, Red Sea Part, Telco Manufacturer Ltd, 9,999.00, 6, 59,994.00), 840 Fourth Telco Channel Ltd (23235282, 2 By 2 User Card, Telco Manufacturer Ltd, 599.99, 6, 3,599.94).
- Audit Log:** Table with columns Name, Date, Action. Data rows: Noah Ark (04/11/2010 11:11:47, Viewed the agreement from an view page), Noah Ark (30/10/2010 01:12:20, Alert Issued 5747: 3 Months Agreement Notice), Noah Ark (28/10/2010 15:10:46, Viewed the agreement from an search page), Noah Ark (08/10/2010 01:12:31, Alert Issued 5310: Monthly Agreement Update), Noah Ark (30/09/2010 01:11:58, Alert Issued 5173: 4 Months Agreement Notice), Noah Ark (09/09/2010 16:20:51, Completed alert id 4568: 5 Months Agreement Notice).

4.1.1 Calling or Emailing a Primary Contact:

1. Within the Companies table, highlight the chosen user and then click on the required Option;



2. If you have selected the 'Call User' option, you will then be presented with the following screen;

A screenshot of the 'Add Call Note' screen in the LEASE-DESK.COM system. The page has a header with the company logo and navigation tabs: Home, Agreements, Search, and Dashboard. There is a 'back' button and an 'Alerts' link. The main content area is titled 'Add Call Note' and includes a sub-header 'Add a note by adding details to the message box and clicking on Save.' Below this is a form with several fields: 'Agreement ID' (157), 'Customer Name' (Beacon Insurance Ltd), 'User Name' (Bob Sinclair), 'Company Name' (Beacon Insurance Ltd), 'Telephone Number' (01252 456 782), and a 'Message' field which is a large text area. At the bottom of the form is a 'Save Details' button.

3. Complete the details and click
4. The detail will then be saved as a standard note, visible within the agreement.

5. If you have selected the 'Email User' option, you will then be presented with the following screen;

LEASE-DESK.COM

Home Agreements Search Dashboard Alerts

back

Add Email Note

Add a note by adding details to the message box and clicking on Save.

Agreement ID	157
Customer Name	Beacon Insurance Ltd
User Name	Bob Sinclair
Company Name	Beacon Insurance Ltd
Email	bob.sinclar@lease-desk.com
Populate	Blank ▼
Message	

6. Select either 'Blank' or 'Agreement Details' from the 'Populate' dropdown list.

7. Enter the message and either click on 'Save', to save the message or 'Open in Email Client' to open up your email, ready to send the message to the selected user.

4.1.2 Creating Follow Ups:

1. Highlight the contact required from the Companies table as indicated below;

Call User Email User Follow Up			
ID	Name	Primary Contact	Type
98	BDE Logistics Ltd	Pete Johnson	Customer
133	Bell Finance PLC	Rosie Phipps	Provider
176	Fourth Telco Channel Ltd	Noah Ark	Vendor

2. Click on



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

LEASE-DESK.COM

Home Agreements Search Dashboard Alerts (269)

back

Add Calendar Note

Add a note by adding details to the message box and clicking on Save.

Agreement ID	157
Customer Name	Beacon Insurance Ltd
User Name	Neil Pollock
Company Name	Bright Tel Ltd
Subject	
Date	
Notes	Customer Name: Beacon Insurance Ltd Agreement ID: 157 Contact: Neil Pollock Tel: 01604 596569 Email: neil.pollock@lease-desk.com Link: https://phase2.lease-desk.com/agreement/view/157/

4. Enter a 'Subject' line and then click in the 'Date' box to bring up a calendar.

5. Set the date and time for the follow up and then enter any other details into the 'notes' box.

6. Click

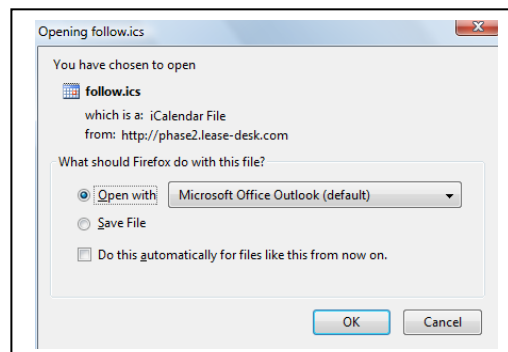
Open In Local Calendar

to open up your email or

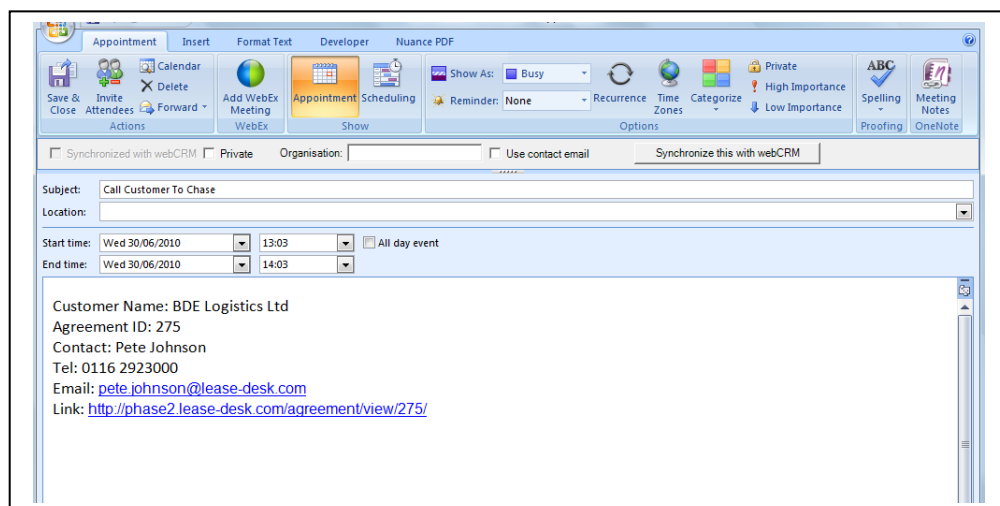
Save Details

to save the information added.

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



8. Click on 'Ok' to open up your email. You will then receive the following screen;



9. Click 'Save & Close' to then add to your outlook calendar as a reminder.

4.1.3 Adding and Viewing a File:

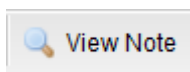
1. To Add or View a File, follow chapter **3.1. Adding and Viewing Files**

4.1.4 Viewing a Note:

1. Within the main 'View Agreement' screen, go to the Notes table as per below;

Notes				
Add Note View Note Summarise				
ID	Type	Name	Note	Date
454	External	Mark Ash	Failed to call customer due to	20/09/2016 15:55:43

2. Highlight the note required and Click



3. You will then be presented with the 'View a Note' screen which will provide all details of which user added the note and when, as indicated below;

Logged in as: Steve Barnard | Feedback | Logout

LEASE-DESK.COM

[Home](#)
[Agreements](#)
[Search](#)
[Dashboard](#)
Alerts (270)

[back](#)

View Note

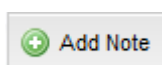
Full note details are detailed below.

Agreement ID	157
Customer Name	Beacon Insurance Ltd
Username	Steve Barnard
Type	External
Message	Call customer tomorrow with update.

4.1.5 Adding a Note:

1. Within the main 'View Agreement' screen, go to the Notes table.

2. Click



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

Logged in as: Steve Barnard | Feedback | Logout

LEASE-DESK.COM

Agreements Search Dashboard Alerts (270)

back

Add Note

Add a note by adding details to the message box and clicking on Save.

Agreement ID	157
Customer Name	Beacon Insurance Ltd
Type	External
Message	External Internal

3. Select the Type, i.e. Internal or External.

Note: An External note will generate an email to all users that can view the particular agreement and can be seen by everyone. An internal note can only be viewed by the users that are in the same organisation as the user inputting the note.

4. Type your message into the blank message box.

Save Details

5. Click

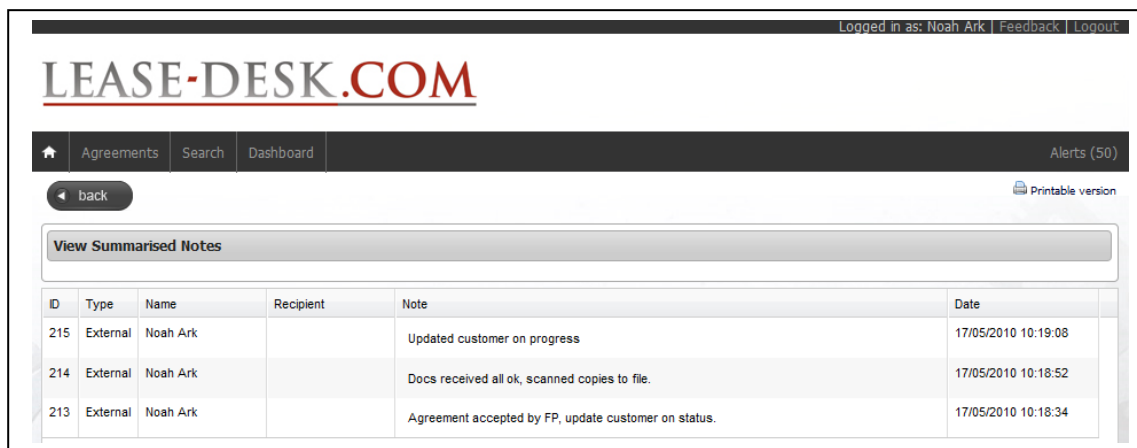
6. You will then be taken back to the main 'View Agreement' screen.

4.1.6 Summarising Notes:

1. You can view the Summarise Notes screen either within the particular agreement selected or via the main agreement list by highlighting the particular agreement and selecting

Summarise

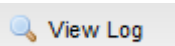
- You will then be presented with the following View Summarised Notes screen;

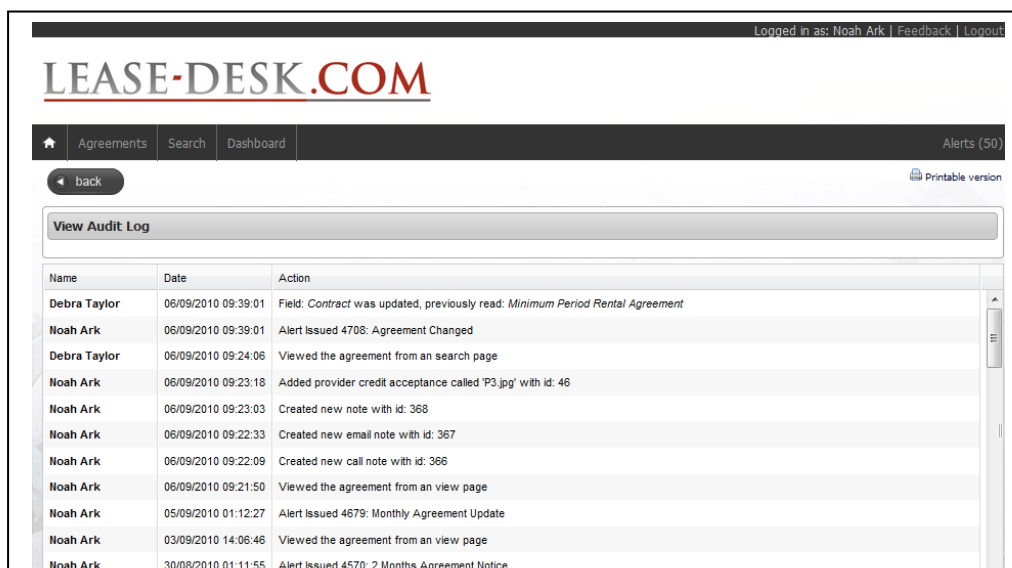


ID	Type	Name	Recipient	Note	Date
215	External	Noah Ark		Updated customer on progress	17/05/2010 10:19:08
214	External	Noah Ark		Docs received all ok, scanned copies to file.	17/05/2010 10:18:52
213	External	Noah Ark		Agreement accepted by FP, update customer on status.	17/05/2010 10:18:34

4.2. Viewing an Audit Log:

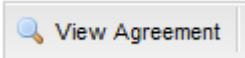
- There are two ways in which to view the Audit Log against an agreement;

A) Either highlight the required Agreement from the main Agreement Lists screen as indicated previously and then click  to receive the following screen;



Name	Date	Action
Debra Taylor	06/09/2010 09:39:01	Field: Contract was updated, previously read: Minimum Period Rental Agreement
Noah Ark	06/09/2010 09:39:01	Alert issued 4708: Agreement Changed
Debra Taylor	06/09/2010 09:24:06	Viewed the agreement from an search page
Noah Ark	06/09/2010 09:23:18	Added provider credit acceptance called 'P3.jpg' with id: 46
Noah Ark	06/09/2010 09:23:03	Created new note with id: 368
Noah Ark	06/09/2010 09:22:33	Created new email note with id: 367
Noah Ark	06/09/2010 09:22:09	Created new call note with id: 366
Noah Ark	06/09/2010 09:21:50	Viewed the agreement from an view page
Noah Ark	05/09/2010 01:12:27	Alert issued 4679: Monthly Agreement Update
Noah Ark	03/09/2010 14:06:46	Viewed the agreement from an view page
Noah Ark	30/08/2010 01:11:55	Alert issued 4570: 2 Months Agreement Notice

or

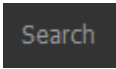
B) Select the Agreement required from the Agreement list and click  and then scroll down to the bottom of the page where it says 'Audit Log' to be presented with the following;

Audit Log		
Name	Date	Action
Noah Ark	28/04/2010 16:12:59	Created new note with id: 158
Noah Ark	28/04/2010 16:08:17	Created new note with id: 157
Noah Ark	28/04/2010 15:58:18	Viewed the agreement from an view page
Debra Taylor	28/04/2010 15:02:28	Viewed the agreement from a search page
Debra Taylor	22/04/2010 14:37:32	Viewed the agreement from a search page
Noah Ark	12/04/2010 10:39:38	Created new internal note with id: 116
Debra Taylor	09/04/2010 09:11:34	Field: <i>First Payment Date</i> was updated, previously read: 2005-04-09

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

Note: Either way will show you the same information. It keeps a log of all activity against the agreements such as when something is changed or when a user views an agreement either directly or via the Search screen. The system will only count one view per user, from any location per day in order.

5.0 Search:

1. Go to  on the top main menu.
2. You will be presented with the following 'Search Agreements' screen;

Logged in as: Noah Ark | Feedback | Log

LEASE-DESK.COM

★ Agreements Search Dashboard Alerts (0)

[← back](#)

Search Agreements

This provides users with a facility to search for required agreements by selecting different search criteria. Enter the customer details if known to bring up the required information, or search for all customer agreements and use the filters within each table and report type, to produce the required report information.

Search Mode

Type Standard Search

Customer

Name

Agreement Status All

Prospect Status All

Search

Date Range None

From: Dec 2010 To: Dec 2010

Customer

Customer

All

< > Filter Add Remove

Vendor

Vendor

All

< > Filter Add Remove

Primary Contact

Contact

All

< > Filter Add Remove

Group

Group

All

< > Filter Add Remove

Product

Product

All

< > Filter Add Remove

Agreement

Months Left All

RBO Level All

Customer Detail

Sic Code

All

< > Filter Add Remove

Post Code

Post

All

< > Filter Add Remove

Turnover All

Credit Limit All

Credit Rating All

Employees All

Output Type

Report Default

View Report Export to CSV

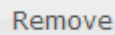
Reset Form

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

4. To bring up the information in any of the tables, click

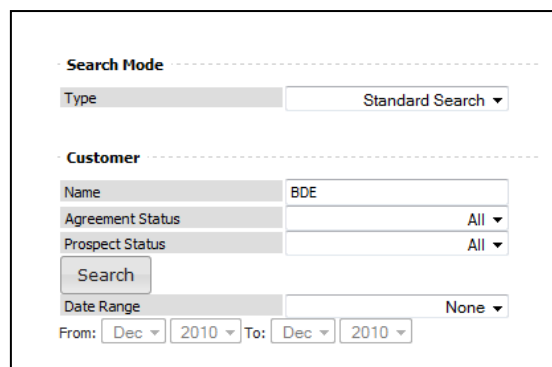


5. To remove any data selected, click



5.1. Searching for Specific Customer Agreement Information:

1. 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, keeping the standard search dropdown option.



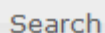
The screenshot shows a search form with the following fields and options:

- Search Mode:** A dropdown menu currently set to "Standard Search".
- Customer:**
 - Name:** A text input field containing "BDE".
 - Agreement Status:** A dropdown menu set to "All".
 - Prospect Status:** A dropdown menu set to "All".
 - Search:** A button to execute the search.
 - Date Range:** A dropdown menu set to "None".
 - From:** A date selector showing "Dec" and "2010".
 - To:** A date selector showing "Dec" and "2010".

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

- Agreement Status
- Prospect Status (if previous Status is set to Prospect)
- Date Range (if applicable). Note you can search for different options within this menu such as 'Expected Close Date, Last Payment Date etc'.

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.

Add

Primary Contact, and then click

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

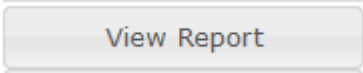
7. Carry on with each table required, following the previous step.

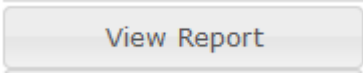
8. You will reach the following drop down options at the bottom of the search screen. If required, select an option from each;

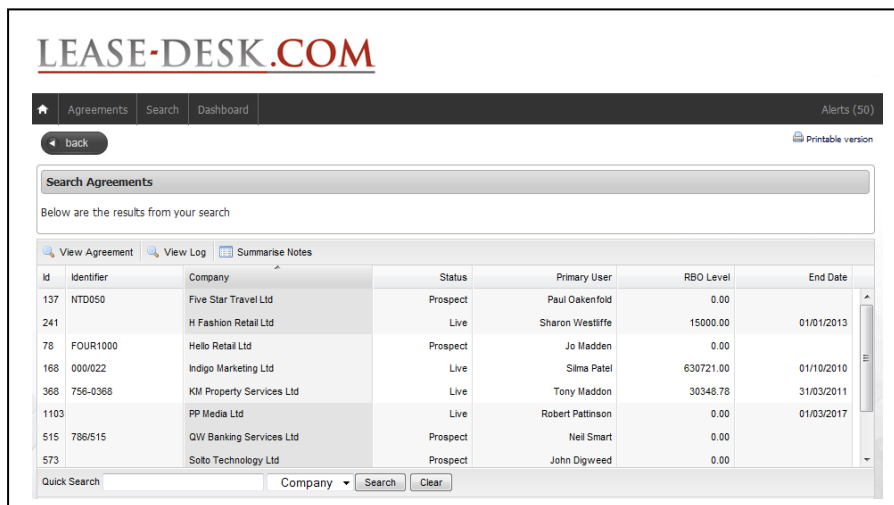
9. Go to the 'Output Type', and select a report type from the drop down menu.

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

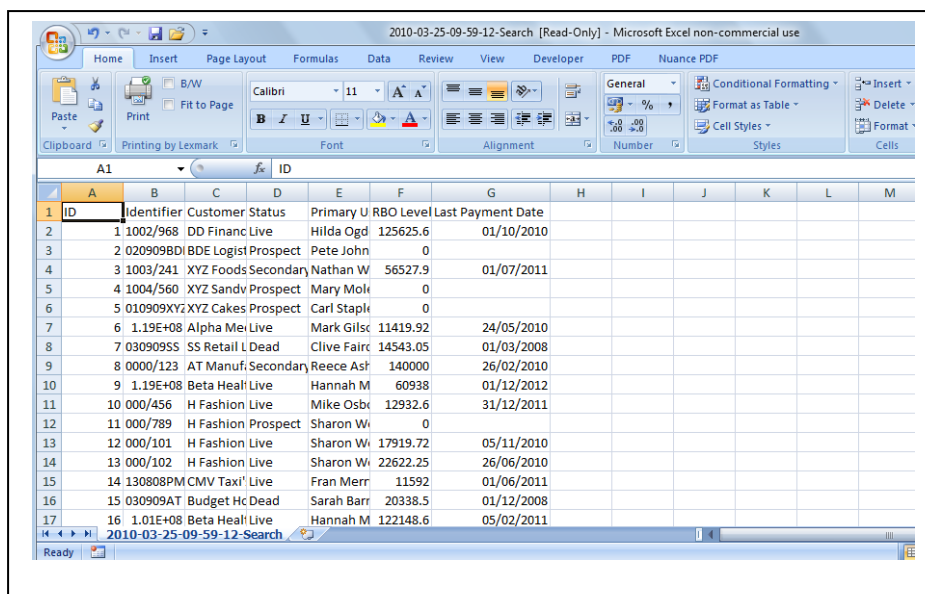
1. **Default:** ID, Identifier, Company, Status, Primary User, RBO Level, End Date
2. **Management Report:** Customer Name, RBO Level and Internal Agreement ID, Primary Vendor.
3. **Sales Report:** Vendor, Vendor Contact, Customer, Customer Contact, Customer Telephone, Postcode, Agreement ID, RBO Level, Term, Periods Remaining.
4. **Sales Report (Detailed):** ID, Agreement Status, Customer Name, Equipment location, Provider Name, External ID, Term, Regular Payment, RBO Level, Settlement Figure, Months Remaining & Capital Amount.
5. **Marketing Report (Full Details):** With all details listed below.
6. **Marketing Report (Email):** Customer Name, Primary Vendor, SIC Code, Turnover, Postcode, Primary Customer Contact, Primary Vendor, Primary Customer Email.
7. **Marketing Report (Postal):** As above, minus email but with full address details.
8. **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.
9. **Prospect Report:** Customer Name, ID, Prospect Status, Primary Vendor, Vendor User, Capital Amount.
10. **End of Lease Report:** ID, Customer Name, Term Type, Put Option, Put Option Cost, Secondary Rental, Secondary Rental Split, Notice Period, Last Payment Date.
11. **Arrears Report:** ID, Customer Name, Arrears Total, Settlement Figure,

A rectangular button with a light gray gradient and a thin border. The text "View Report" is centered in a blue, sans-serif font.

10. Once the report type has been selected, click on  and you will be presented with the data in the below format;



or [Export to CSV](#) to view in CSV format as per the following page;



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

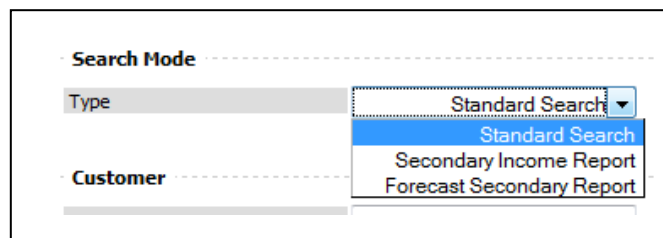
Search

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

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

5.3. Changing the Search Mode:

1. On the main search screen you have the option to change the search mode in order to view two additional report types, as indicated below;

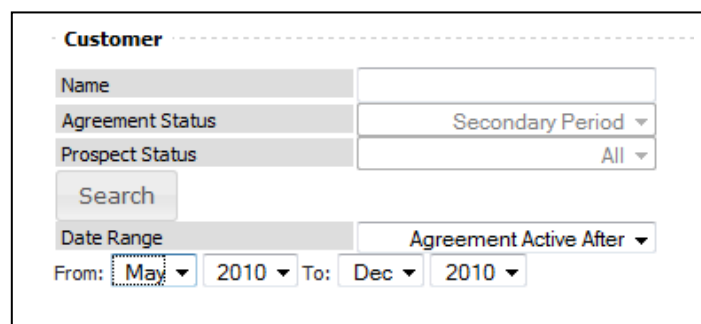


The screenshot shows a 'Search Mode' section with a 'Type' dropdown menu. The dropdown is open, showing three options: 'Standard Search' (highlighted in blue), 'Secondary Income Report', and 'Forecast Secondary Report'. Below the dropdown is a 'Customer' field.

5.3.1 Secondary Income Report

1. If you select this report, it will automatically set the agreement status to 'secondary period' and Prospect Status to 'All'.

2. Next, select the date range that you wish to search for, as indicated below.



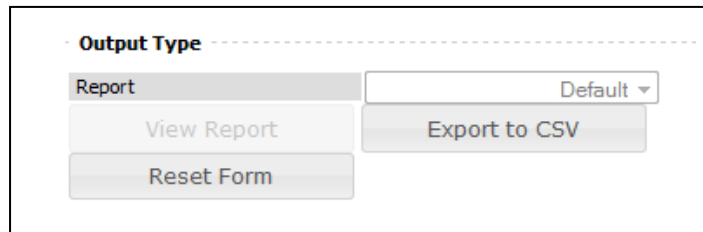
The screenshot shows the 'Customer' section of the search interface. It includes fields for 'Name', 'Agreement Status' (set to 'Secondary Period'), and 'Prospect Status' (set to 'All'). There is a 'Search' button. Below this is a 'Date Range' section with 'From' (May 2010) and 'To' (Dec 2010) dropdowns, and an 'Agreement Active After' dropdown.

3. Continue to select the relevant criteria required before selecting your report type from the dropdown list.

4. Note: This report type is only viewable via CSV format. To view the data, click on

Export to CSV

as indicated below;



Output Type

Report: Default ▾

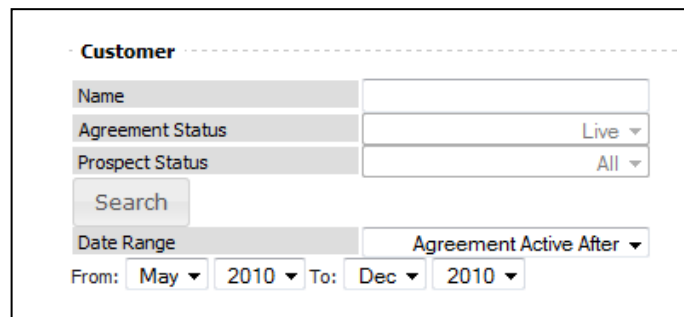
View Report

Reset Form

Export to CSV

5.3.2 Forecast Secondary Report

1. If you select this report, it will automatically set the agreement status to 'Live' and Prospect Status to 'All'.



Customer

Name:

Agreement Status: Live ▾

Prospect Status: All ▾

Search

Date Range: Agreement Active After ▾

From: May ▾ 2010 ▾ To: Dec ▾ 2010 ▾

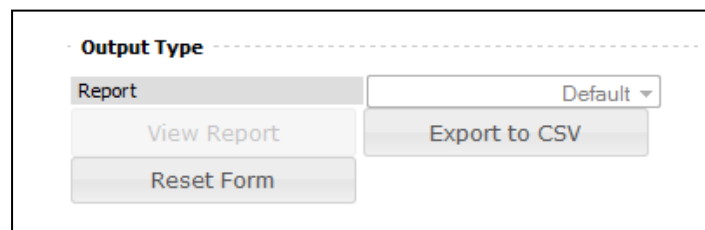
2. Next, select the date range that you wish to search for, as indicated below.

3. Continue to select the relevant criteria required before selecting your report type from the dropdown list.

4. Note: This report type is only viewable via CSV format. To view the data, click on

Export to CSV

as indicated below;



Output Type

Report: Default ▾

View Report

Reset Form

Export to CSV

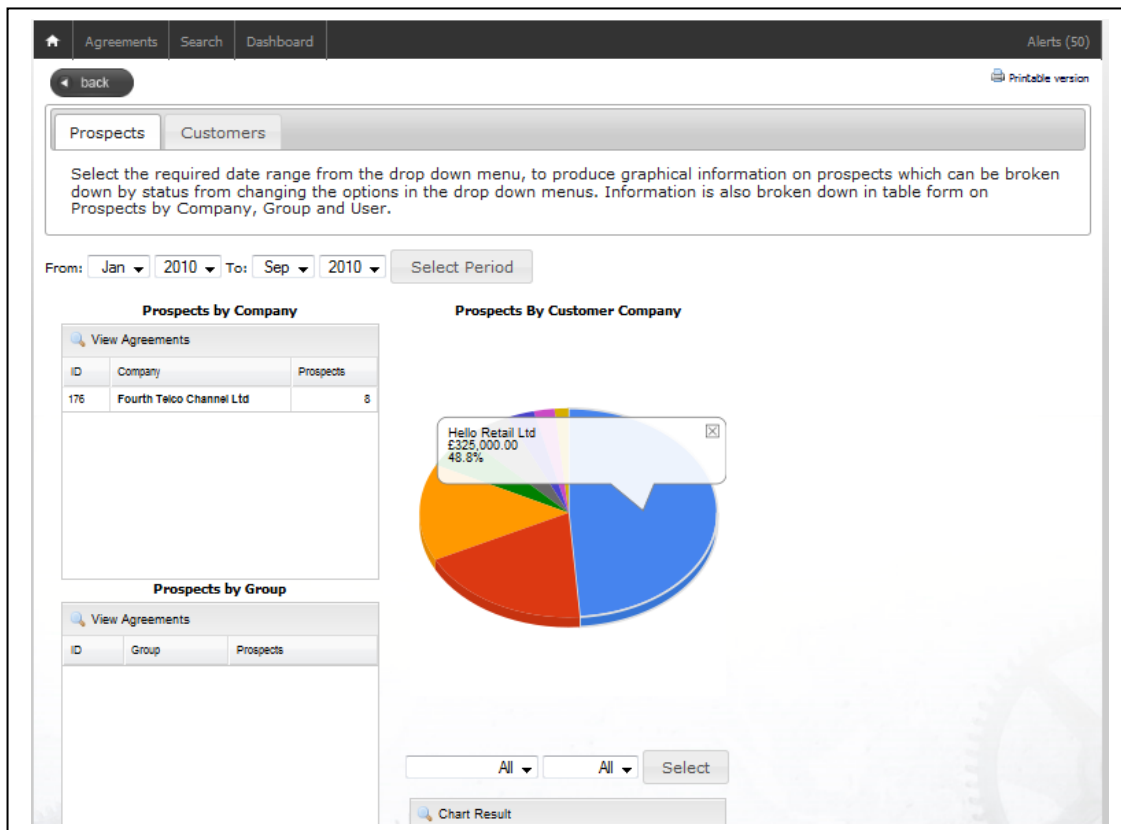
6. Dashboard:

This screen provides users with a snap shot of 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 default pie chart indicating Prospects by Customer Company, as indicated below;



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

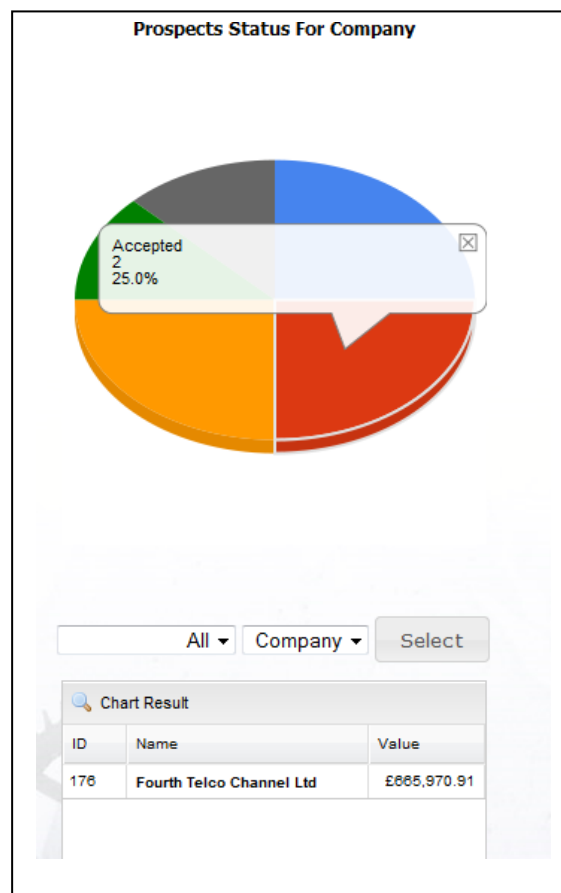
Select Period

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

From: Jan 2010 To: Sep 2010 Select Period

5. Click on 'Select', as indicated below, and the graph will then display all of the Prospect Milestones broken down.

All Company Select



6. To view any of the information in the tables shown, highlight the required line of information and click 'View Agreements' as indicated below;

Prospects by Company

View Agreements

ID	Company	Prospects
176	Fourth Telco Channel Ltd	37
182	Bright Tel Ltd	35
136	Data Communications Ltd	33
135	Voice Communications Ltd	32
138	Comms VAR Ltd	31
106	Third Telco Channel Ltd	25

< prev next >

6. Alternatively, double click on the required line.

Note: To view any of the segments within the Pie Chart, simply click on the required segment and you will be taken to the agreements associated with the chosen area selected.

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.

All Company Select

All

None

Quote

Proposed

Referral

Accepted

Declined

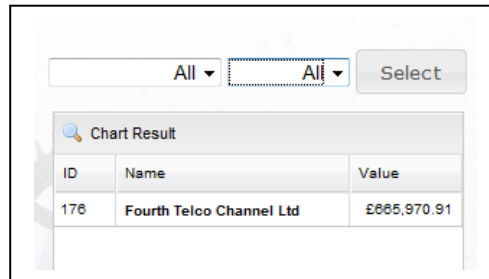
Purchase Order

Sent For Payment

Win

	Value
nnel Ltd	£665,970.91

2. Select All, User, Group or Company from the second drop down menu box and press Select.

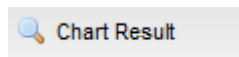


3. You will then be presented with the required information within the table below.

ID	Name	Value
176	Fourth Telco Channel Ltd	£665,970.91

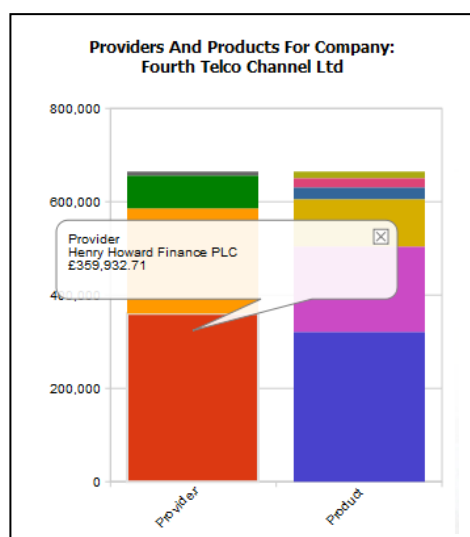
4. Highlight the individual line of information required; Company, User or Group.

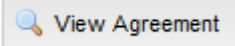
5. To view the information in graphical format, click



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

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



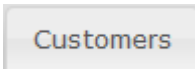
7. To View the Agreement information, highlight the line in the table below the graph and click 



ID	Name	Value	Provider
78	Hello Retail Ltd	£325,000.00	Henry Howard Financial
79	Budget Hotel Ltd	£124,895.00	Siemens Financial Services

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

6.2. Customers:

1. Go to  at the top tab on the 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**

Prospects Customers

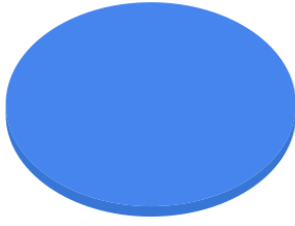
All live Portfolio information can be found on this page, broken down by different sections, e.g. Repeat Business Opportunity by Company etc and in graphical format. To change the Portfolio details shown on this page, select the required options from the drop down menus at the bottom of the page. Select an agreement and click on View Agreement to view details.

Repeat Business Opportunity by Company

View Agreements

ID	Company	Value
176	Fourth Telco Channel Ltd	£1,585,883.19

RBO By Company



Agreements Nearing End Of Term

View Agreement

ID	Company	RBO Value	Months Left
168	Indigo Marketing Ltd	£630,721.00	1
385	DP Manufacturing Ltd	£23,358.25	1
275	BDE Logistics Ltd	£239,148.55	2
175	BDE Logistics Ltd	£592,840.01	5
368	KM Property Services	£30,348.78	8

Repeat Business Opportunity by Group

View Agreements

ID	Group	Value
----	-------	-------

View Portfolio

All Select

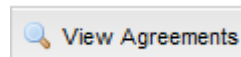
Please Select Display Graph

Top Repeat Business Opportunities

View Agreement

ID	Company	RBO Value	Customer RBO
168	Indigo Marketing Ltd	£630,721.00	£630,721.00

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

Agreements Search Dashboard Alerts (30)

back Printable version

Repeat Business Opportunity by Company

Below are the results from your search

View Agreement View Log Summarise Notes

Id	Identifier	Company	Status	Primary User	RBO Level	End Date
275	CMW05	BDE Logistics Ltd	Live	Pete Johnson	239148.55	30/10/2010
175	000/029	BDE Logistics Ltd	Live	Pete Johnson	592840.01	30/01/2011
725		Beta Healthcare Ltd	Live	Hannah Martin	3866.47	01/01/2013
274	CMW04	CC Retail Ltd	Live	Michael Johns	23998.62	30/08/2012
385	756-0385	DP Manufacturing Ltd	Live	Fred Taylor	23358.25	01/10/2010
885	IMTE029	EFG Logistics Ltd	Live	Cam Gidanti	26601.51	01/07/2012
241		H Fashion Retail Ltd	Live	Sharon Westiffe	15000.00	01/01/2013
168	000/022	Indigo Marketing Ltd	Live	Silma Patel	630721.00	01/10/2010

Quick Search Company Search Clear

10 Page 1 of 1 Displaying 1 to 10 of 10 items

Report Default View Report Export to CSV

Total	Amount
RBO	1,585,883.19

5. You then have the option to View Agreement, View Log and Summarise Notes. Refer back to Chapter 4 for details on how to do this.

6.2.1 Viewing/Amending Portfolio Information:

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

ID	Name	Value
176	Fourth Telco Channel Ltd	£1,585,883.19

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

3. Click

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

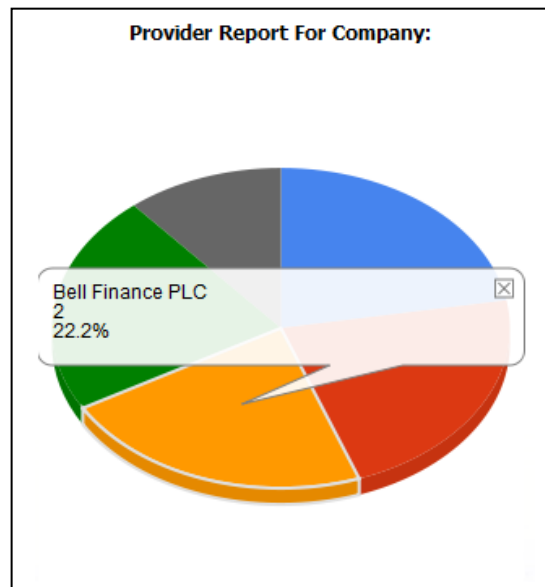
5. Next select the Agreement grouping from the drop down menu, as indicated below;

ID	Name	Value
176	Fourth Telco Channel Ltd	£1,585,883.19

6. Highlight the required row from the table and click

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

Note: To view the legend, hover over the graph segments with your mouse.



7. Alerts:

Part of Lease-Desk's functionality is to send automatic email alerts to Vendor users (Normal and Main) and Super Users. As Main User, dependant on your defined role, you will be able to see all of the system generated alerts associated with your agreements and/or Groups.

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;

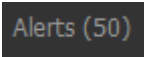
- When a new Agreement is added to the system as a Live, or Prospect contract.
- When a Prospect changes to a Live customer (The vendor will be emailed in reminder to send over insurance details to the Financial Provider, if applicable).
- When a Prospect or Live Agreement Milestone Changes.
- When an Agreement reaches half way through its term, 12 months to run, 9 months to run, 6, 5, 4, 3, 2, and 1 month left to run.

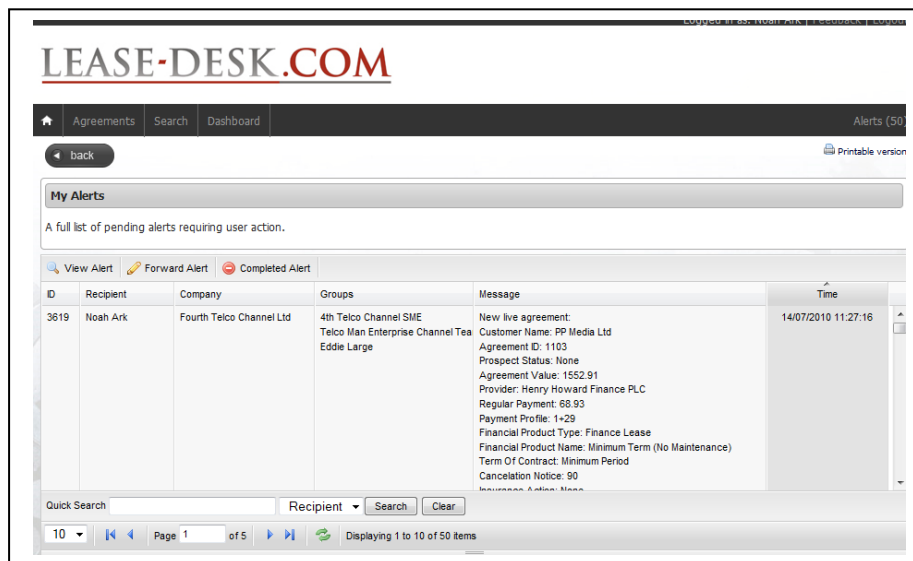
- One month before an agreement reaches its end of term; in order to notify the customer that they need to provide written confirmation to the Financial Provider if cancelation is required.
- Monthly Live Agreement RBO values.
- When an agreement with a Minimum Period Financial Product reaches the end 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.

Note: Emails generated go out on the hour and every, 15, 30, 45 minutes past the hour.

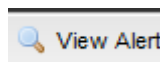
- ***Alerts should appear automatically in the Alerts list.***
- ***Alerts that are not completed will continue to generate alerts every 3 days during the following week unless the Alert has been 'Completed' on the system.***
- ***If multiple agreements, whether prospect or live, for the same customer are created, the User will receive them on one email (rather than be inundated with lots of emails)***

7.1 Viewing Alerts:

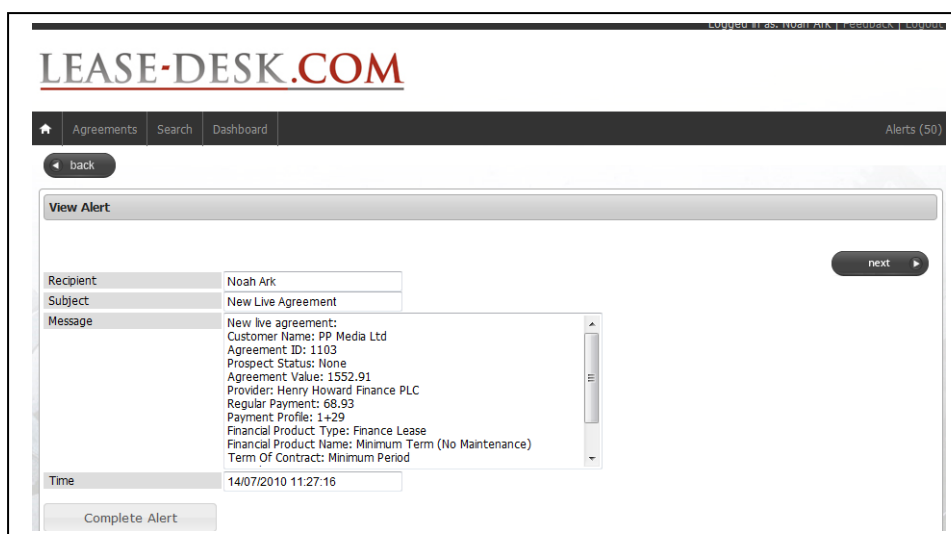
1. To view your individual or team user alerts, select  from the top menu.
2. You will then be presented with the following 'My Alerts' screen as per the following page;



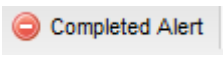
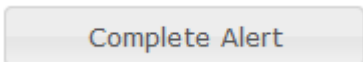
3. To view an alert, highlight the required alert and click



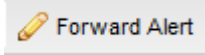
4. You will then be presented with the following screen;

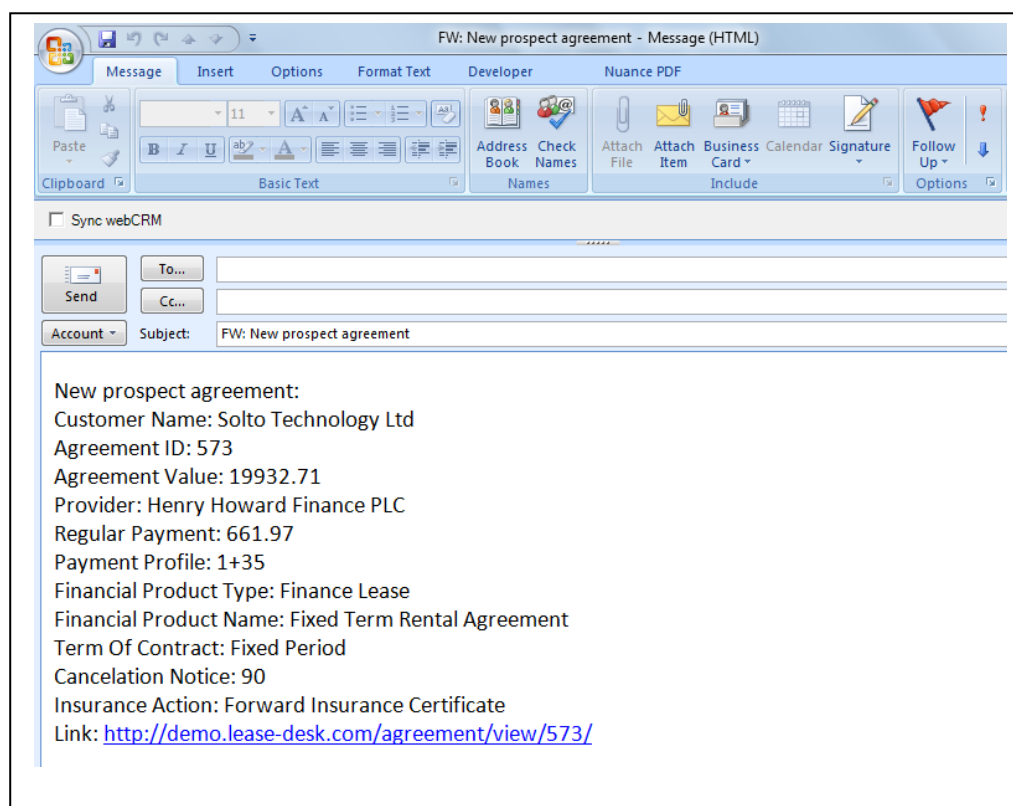


7.2 Completing Alerts:

1. Once the alert has been read and the action has been taken, click  from the main alert list view or  from the 'View Alert' Screen.

7.3 Forwarding Alerts:

1. From the 'My Alerts' main view, highlight the required alert and click 
2. The alert will then be created in mail format allowing you to forward to the relevant contact as per below;

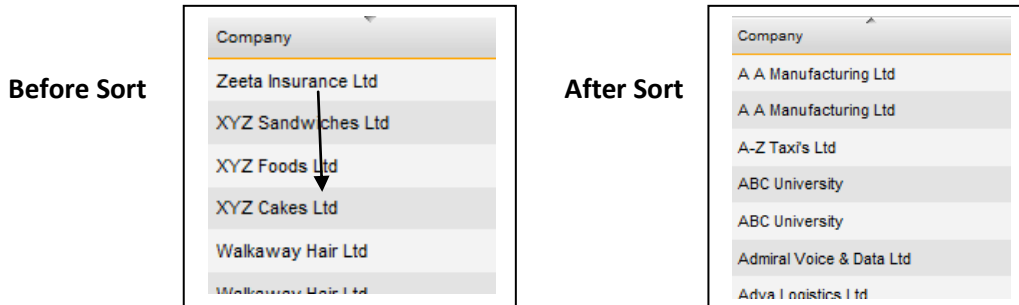


8. General Functionality:

8.1. Sort:

Within Lease-Desk, any of the main tables, for example Companies, Users, Financial Products, provide users with the ability to 'Sort' each column of information in alphabetical or numerical order by the column heading.

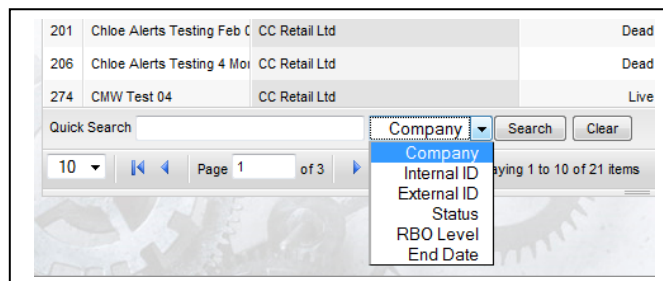
1. To sort a table using the headings of the columns to show the tables contents in alphabetical/numerical order click on the column title.

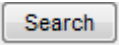


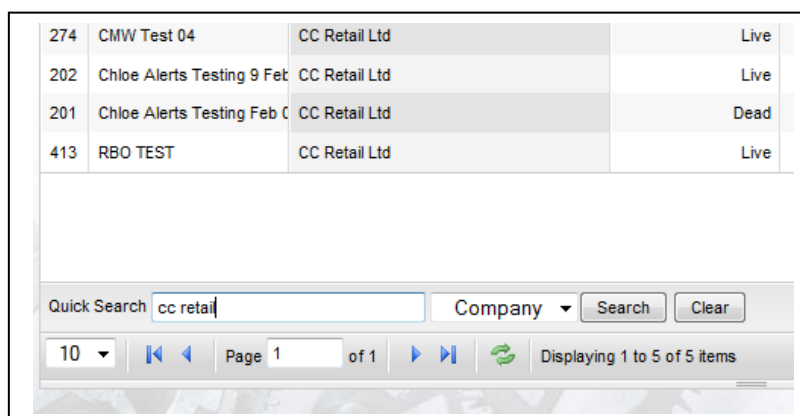
8.2 Quick Search:

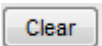
There is a 'Quick Search' functionality available within the majority of the main tables (Companies, Users, Groups etc), allowing easy access to the required information. You will find the 'Quick Search' function at the bottom of the tables noted above.

1. To change the Search option, click on the drop down menu as per below;




2. Enter the search detail and click on  to bring up the details.







3. Click  to start from the beginning.

8.3 Refresh:

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

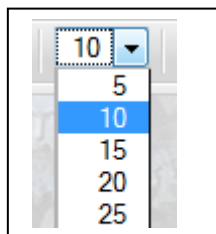
8.4 Scrolling through records:

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

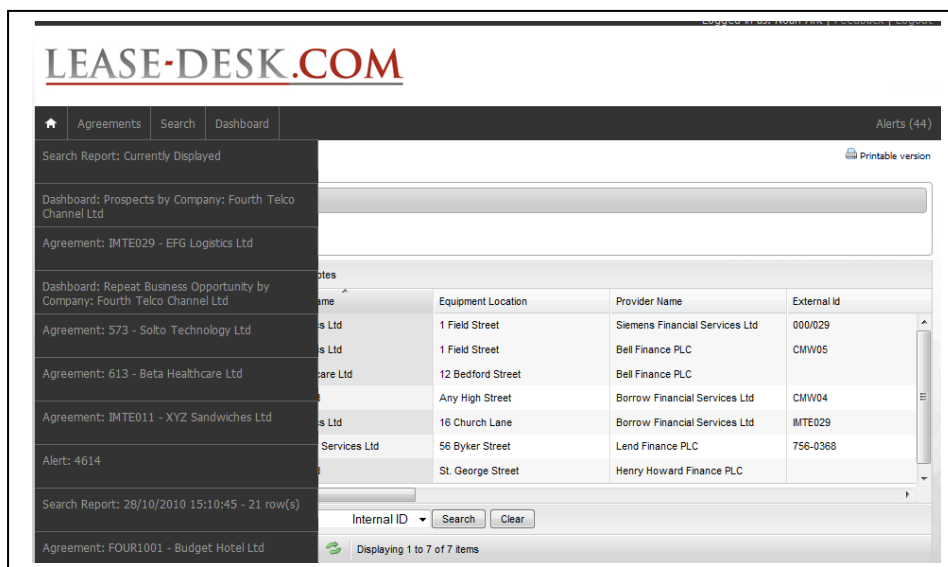
8.5 Changing the amount of records per view:

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



8.6 Last 10 Records:

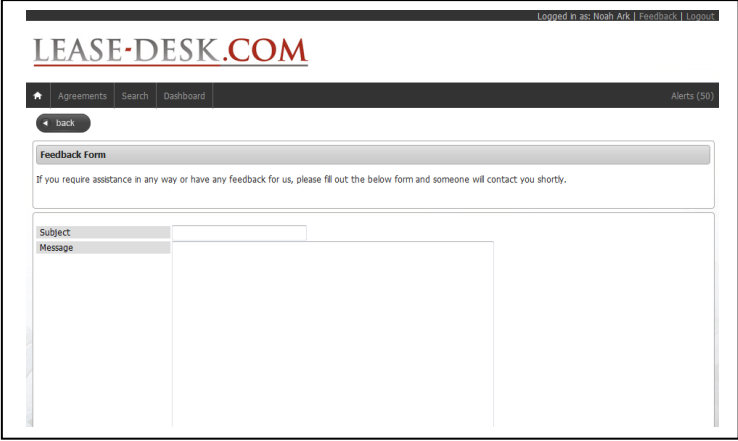
1. Lease-Desk keeps a track on the last ten records that you have viewed, whether it's an agreement or a search report. The data is stored so that you can easily go back to it at any time.
2. To access your 'Last ten records viewed' list, hover with your mouse over the homepage icon as per below;



3. To go to any of the options in the dropdown list, click on the relevant item on the dropdown list.

9. Feedback:

1. To contact Proctor Consulting's Lease-Desk administration team with any feedback, query or issue, from the main menu select 'Feedback'.
2. You will then be presented with the 'Feedback Form' screen as indicated below;



The screenshot shows the LEASE-DESK.COM website interface. At the top, there is a navigation bar with links for Agreements, Search, and Dashboard. A user is logged in as 'Noah Ark'. Below the navigation bar, there is a 'Feedback Form' section. The form includes a 'Subject' field and a 'Message' text area. A 'Send Feedback' button is located at the bottom right of the form.

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

4. Once completed, click

Send Feedback

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

Feedback Form: Complete

Thank you for completing the feedback form

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

10. Frequently Asked Questions:

1. I have forgotten my login details, what do I need to do?

Email Proctor Consulting at support@lease-desk.com or contact us via telephone on 01302 245310 and we will reset your password for you and answer any questions you may have.

2. Why are the agreements with 3 or less months left highlighted in red on the Customer Dashboard?

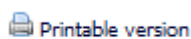
This is to provide additional identification of the agreements nearing the end of term that Require urgent action.

3. My company information on the home page is incorrect but I am unable to amend it, how can I do this?

Either contact Proctor Consulting at the email address or phone number above, or speak to the person who is a 'main' user at your site as they will have editing rights on this page.

4. How do I print out the notes on an agreement?

When you go to the 'Summarise Notes' screen within an agreement, click on the following icon;



to print in a suitable format. You will see this icon in other areas of the system as well.

11. 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