LEASE-DESK

Main Access User Manual

Version 2.2

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1. Introduction to Lease-Desk.com:

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

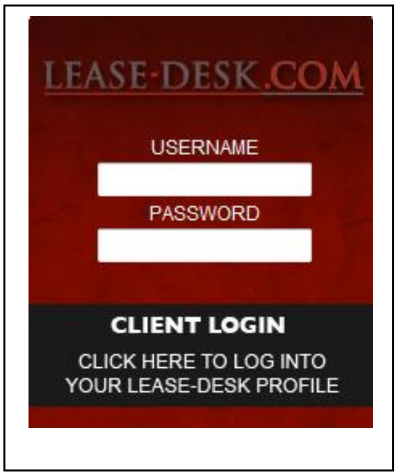
Once the existing Vendor data has been uploaded by our Administration team, normal access users are able to view and/or edit their individual or teams current pending or live customer agreements, and view an overall snapshot of all current agreements via the Dashboard. All available repeat business opportunities 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.

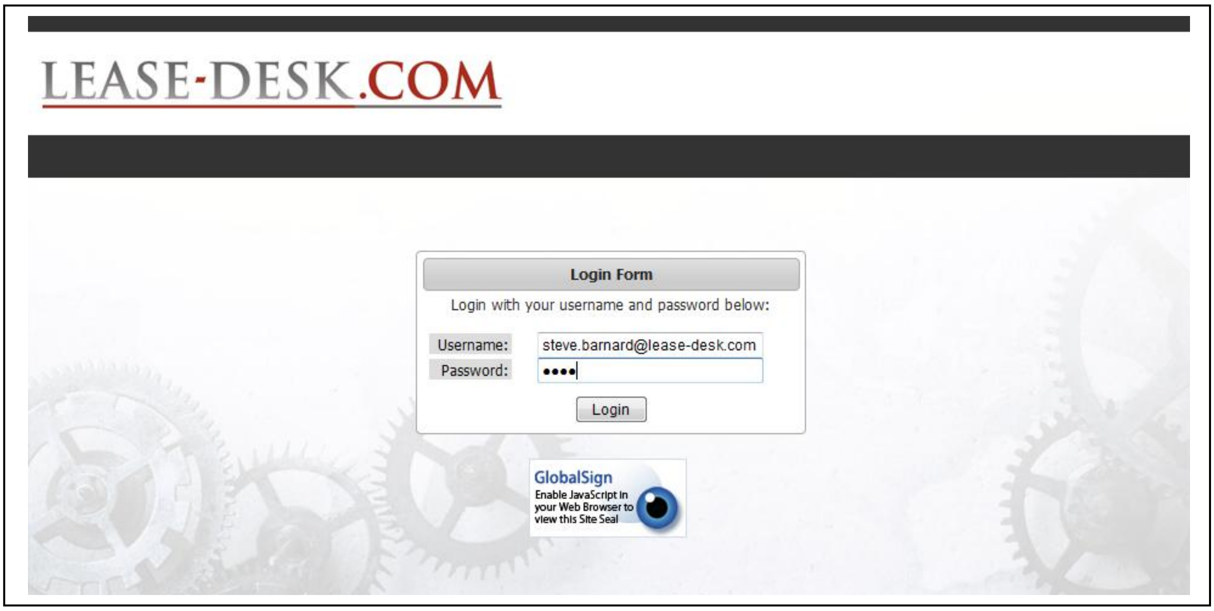
The following user guide is aimed at all 'Main' Access Users who have been set up with a Lease-Desk Account. As a Main user you will have full access to all live and prospect agreement information within your company, both on the agreements list page, search and dashboard and be able to edit certain features within each screen.

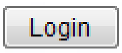
2. Logging into Lease-Desk.com:

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.

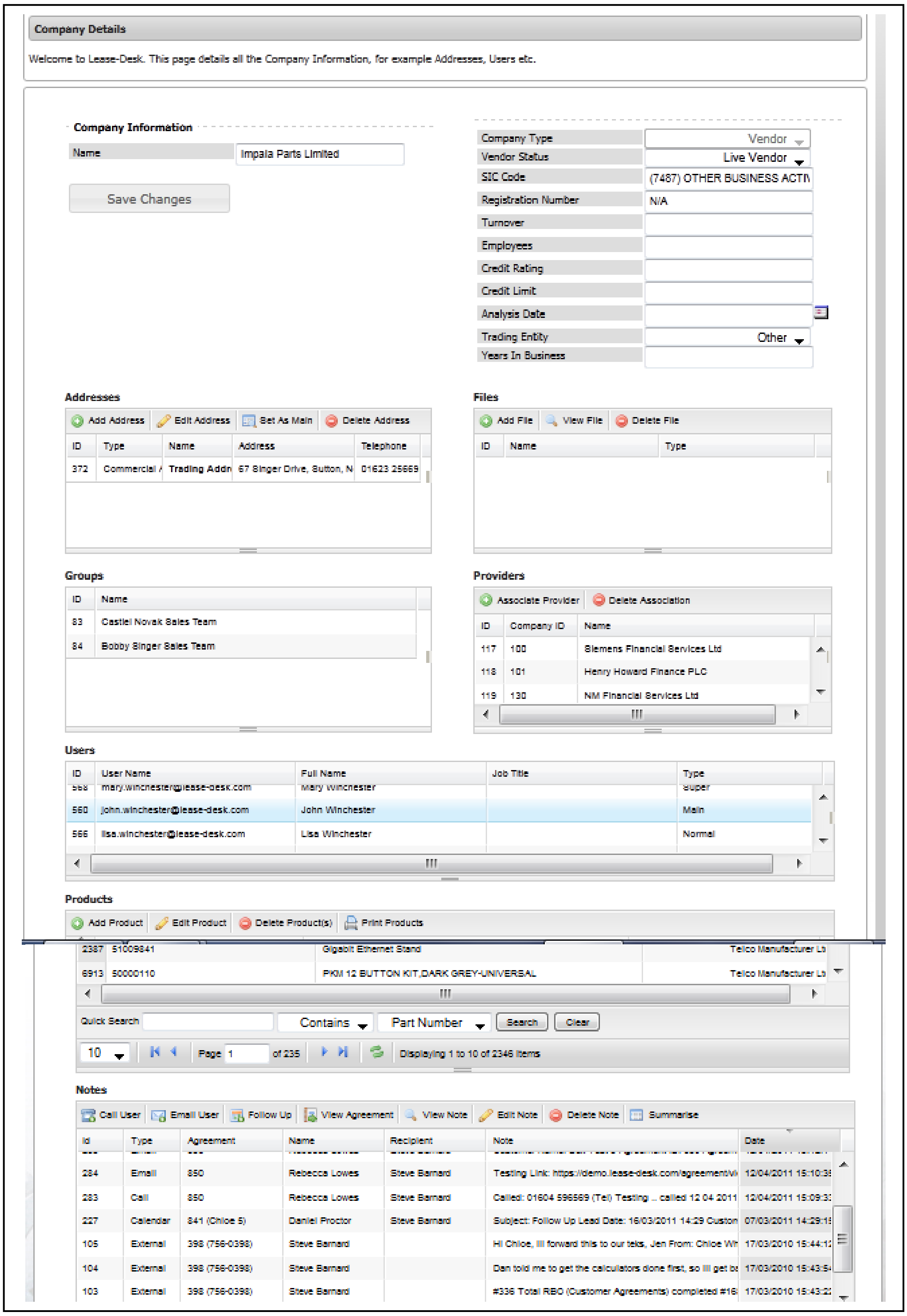


3. Enter your details and click on 

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 per below;



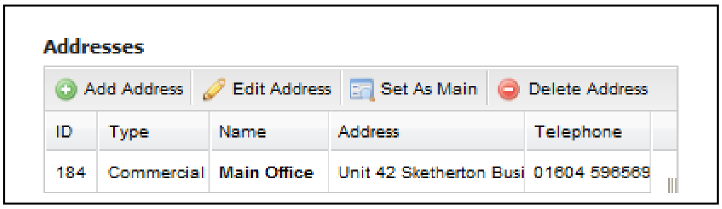
2. This screen details information relating to your company such as Addresses, Files, Users, Products and Providers, (if you are a Vendor), Groups (if you are a Vendor) and Financial Products (if you are a Financial Provider), and notes.

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

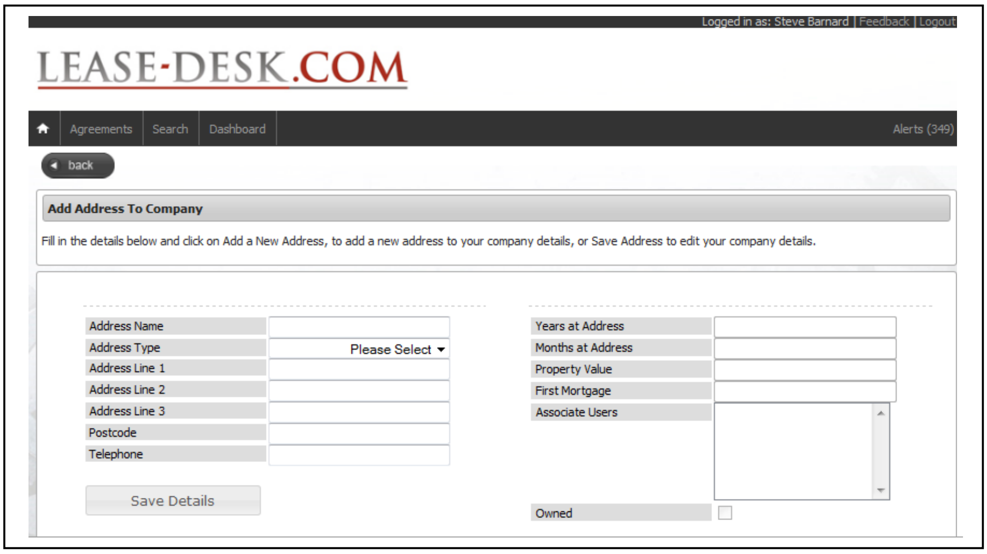
3.1.1. Adding an Address:

1. Click on 

from the main Addresses table as indicated below.

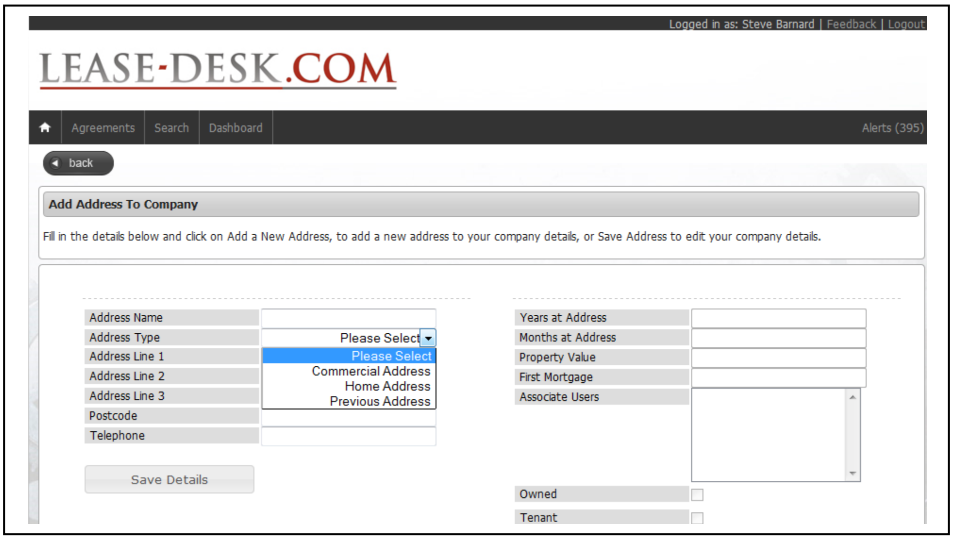


2. You will then be presented with the following 'Add an Address to Company' screen;



3. Firstly, fill in the address name.

4. Next, select the address type from the drop down menu, as indicated below;



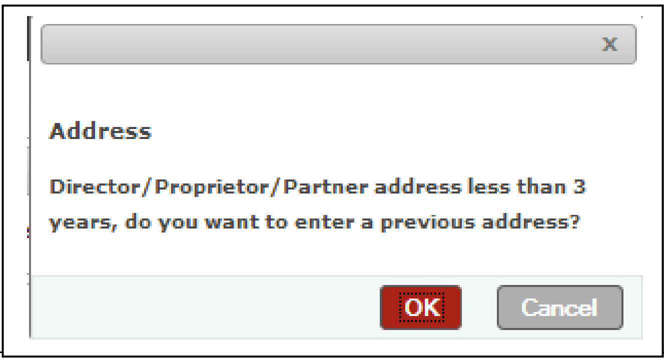
5. Enter the mandatory information required as per below;

- Address Name
- Address Line 1
- Address Line 2
- Postcode
- Telephone

Please note: The fields to the right of the screen are only editable when you select either 'Home' or 'Previous' address from the dropdown menu. If this option is selected, the following are mandatory;

- Years at address
- Owned/Tenant (One needs to be ticked)

If the address added is less than 3 years, you will receive the following pop up warning to ensure that a previous address is added;



Once ‘Ok’ is clicked, you will be taken back to the ‘Add Address’ page in order to add a previous address.

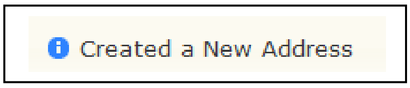
Note: You will notice, if you select ‘Home’ or ‘Previous’ address, the system automatically brings through the list of associated users at your company. This is because the system needs to link one of these address types against a user.

5a. If you have chosen one of these address types, click on the required user from the ‘Associate Users’ box and continue to add the required details.

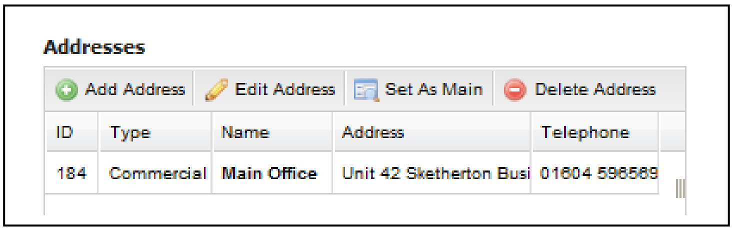
5b. Click on 

once completed.

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

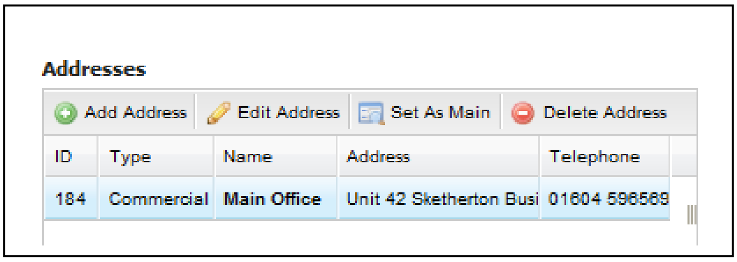


7. The address will also appear within the ‘Addresses Table’ as per below and will automatically default to ‘Main Address’ if it is the first address added against the company.



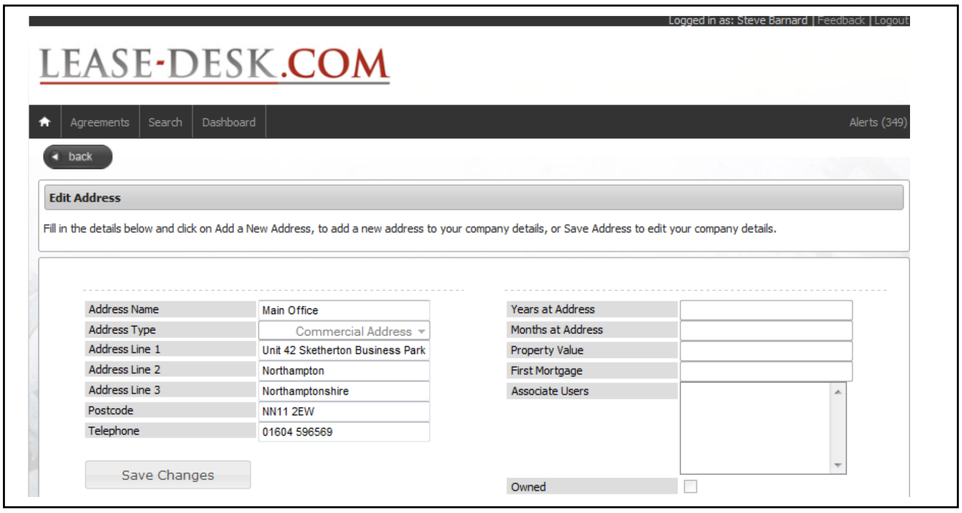
3.1.2. Editing an Address:

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



2. Click on 

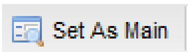
3. You will then be presented with the 'Edit Address' screen as indicated below;



4. Amend the required Address details and click on 

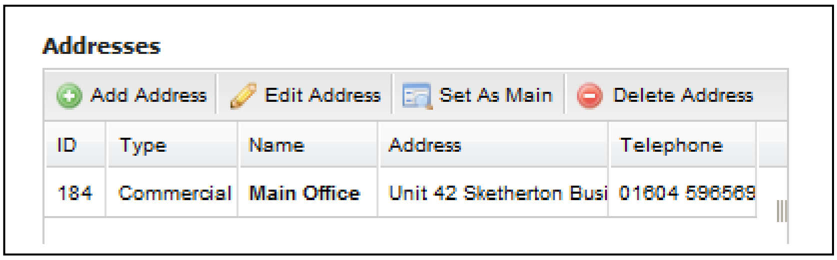
5. You will then be presented with the following confirmation message and taken back to your main Company Details screen, in Edit mode.

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;

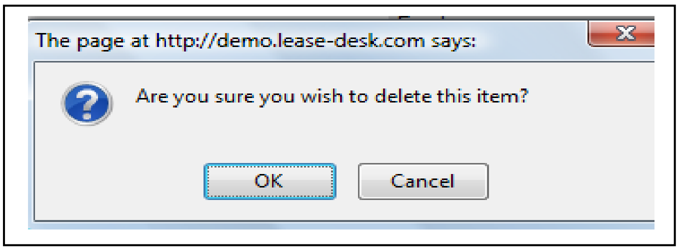
3. The main site address will also be highlighted in bold within the Addresses table, as indicated below;



3.1.4. Deleting an Address:

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

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;

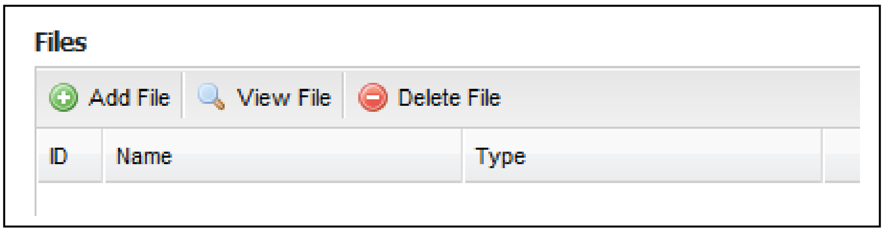
Please note: If you have entered a home or previous address, you will need to delete it first of all from the associated user page before you can delete it from the main company page.

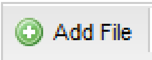
3.2. Adding, Viewing, and Deleting Files:

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

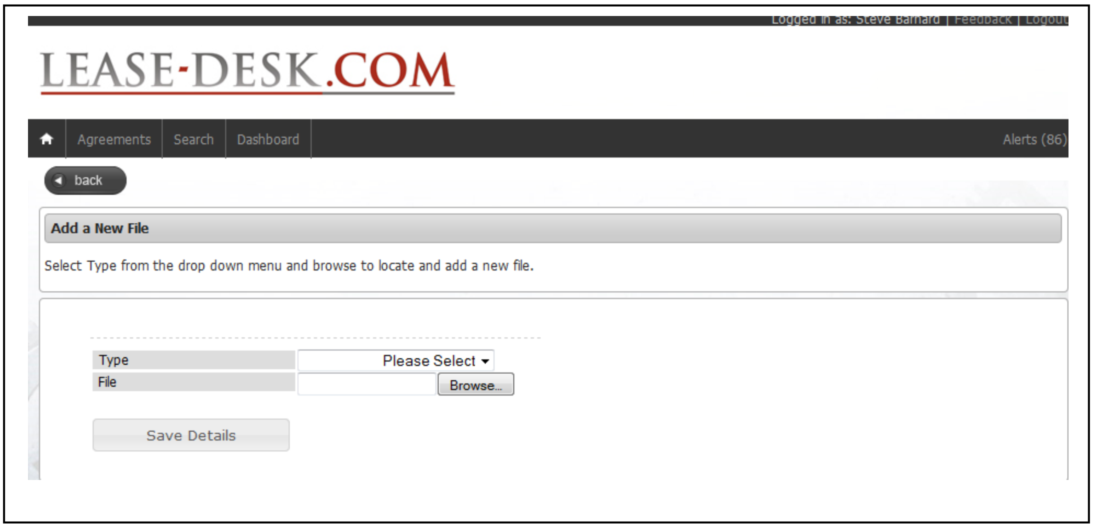
3.2.1. Adding a File:

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



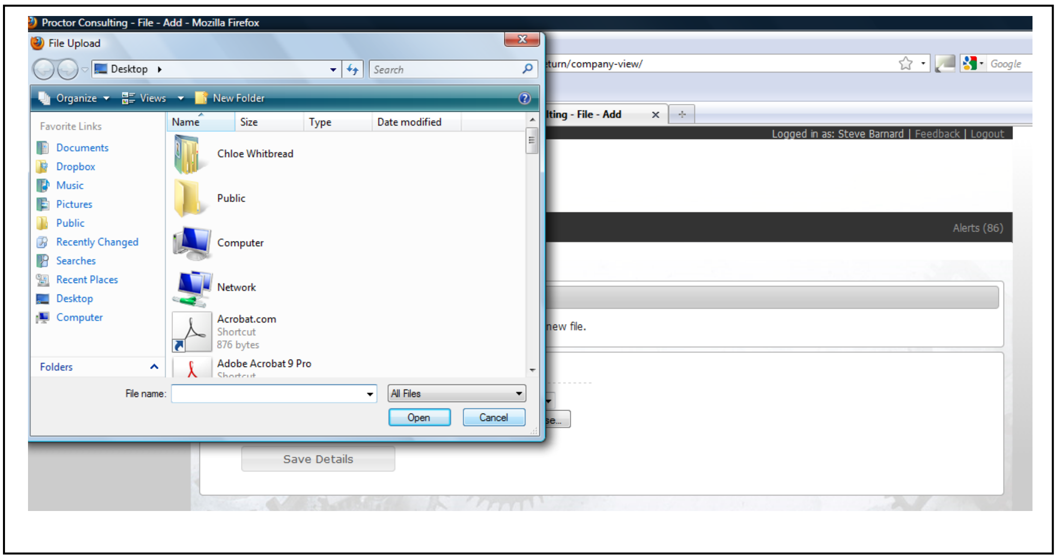
2. To add a file against your Company Details, click 

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.

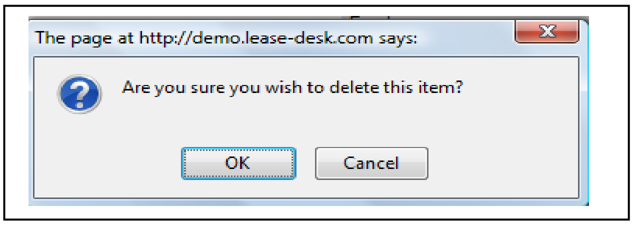
2. Click 

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).

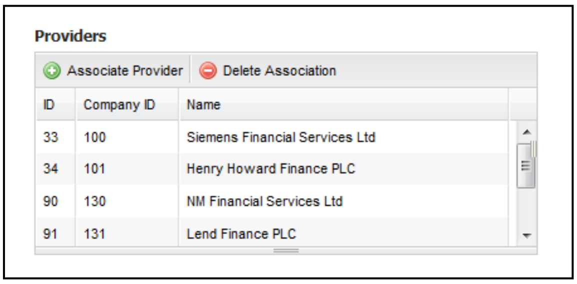
5. You are then taken back to the Edit Company Details screen where you will receive the following confirmation message;

3.3. Providers: Associating and Deleting Association:

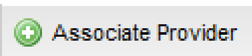
3.3.1. Associating a Provider (Vendor Only):

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

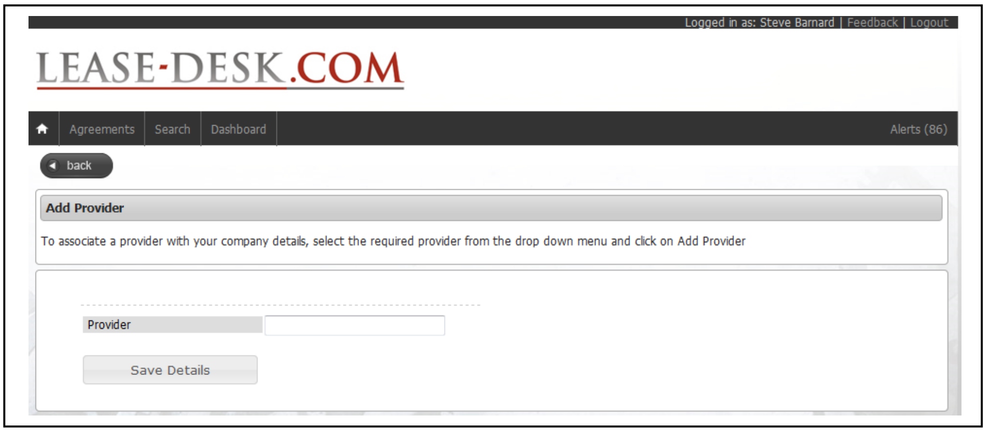
Company Details screen;



ID	Company ID	Name
33	100	Siemens Financial Services Ltd
34	101	Henry Howard Finance PLC
90	130	NM Financial Services Ltd
91	131	Lend Finance PLC

2. Click 

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



4. Type in the name of the provider or type * to bring up the list of providers and then select the required one. Next, click Save Details

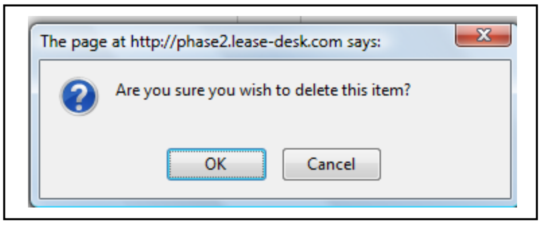
5. You will then be taken back to your homepage.

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 Delete Association

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

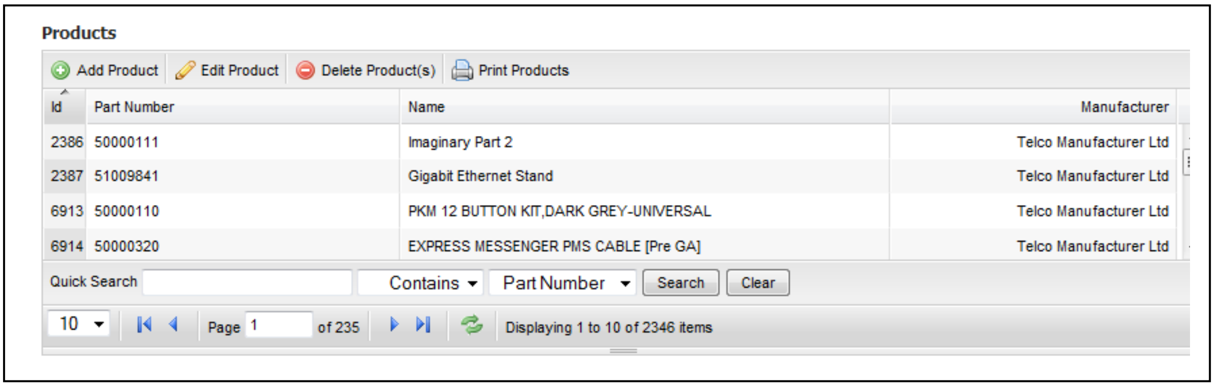


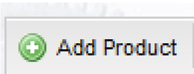
4. You will then be taken back to your home screen.

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

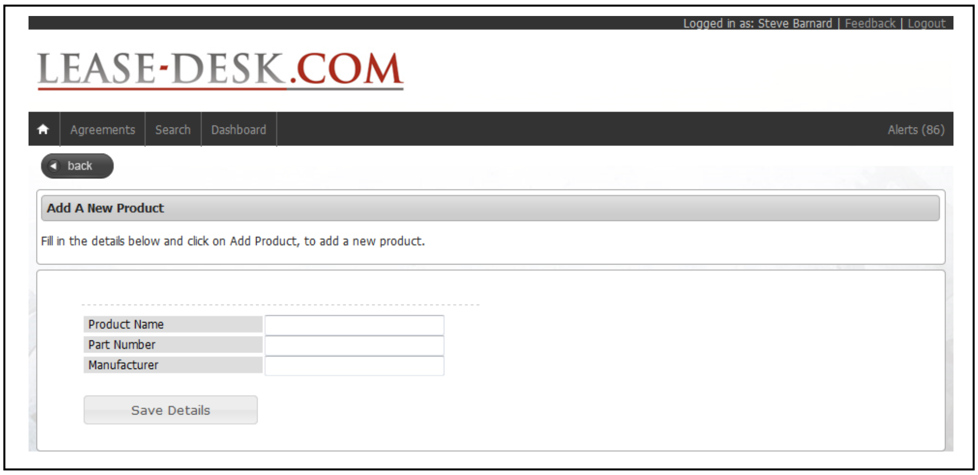
3.4.1 Adding a Product:

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

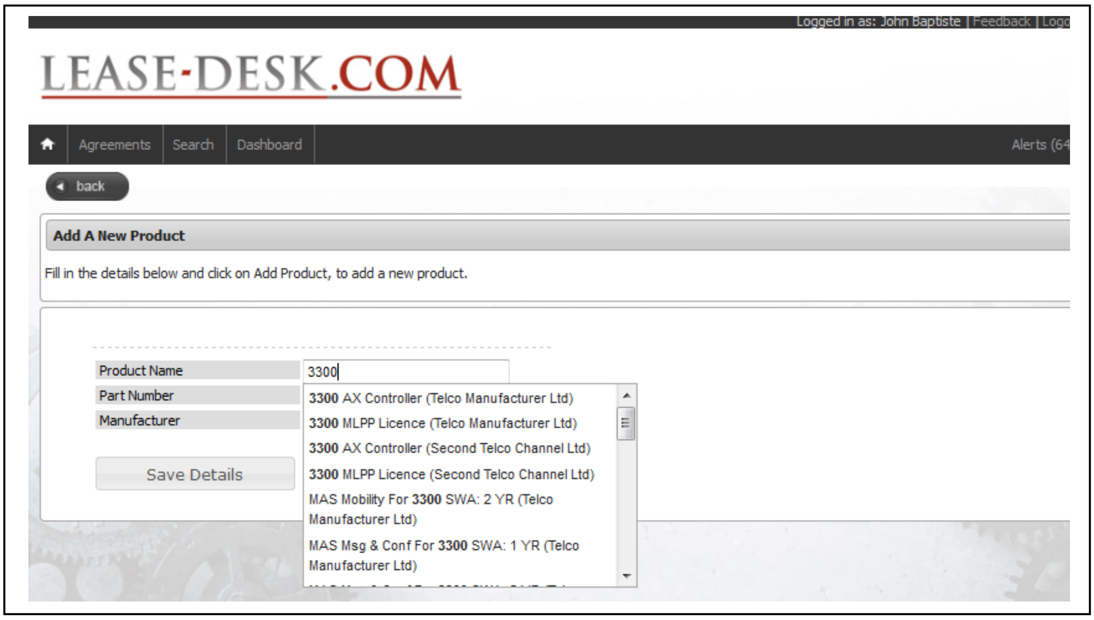


2. Click 

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



4. Start typing in the product name and/or part number. You will notice that the full list of products already in the system will appear so that you can either add a new product or use an existing one (preventing duplication). This is displayed on the following screen.

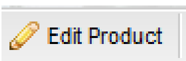


5. Fill in the remaining details and click 

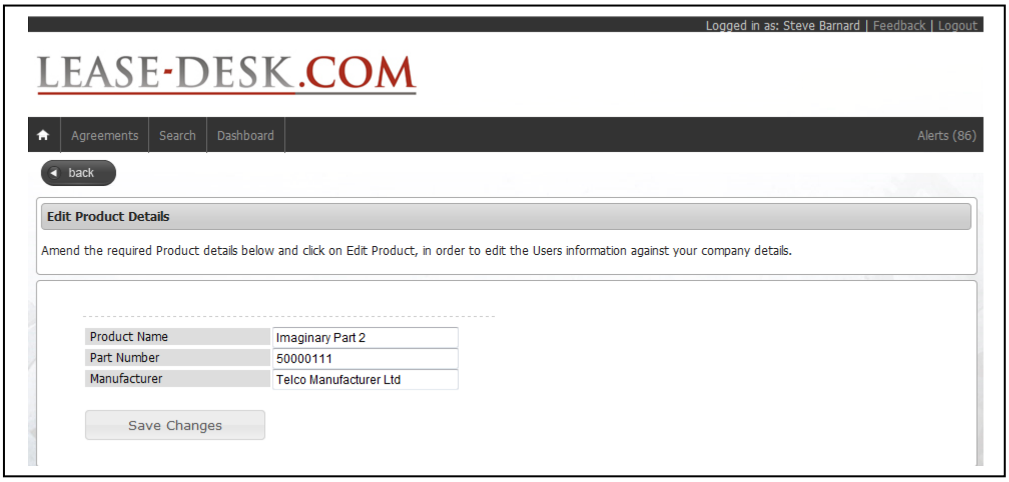
6. You will then be taken back to the main Company Details screen and receive the following confirmation;

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.

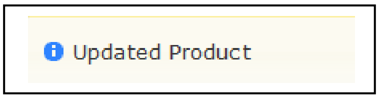
2. Click 

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



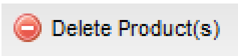
4. Amend the required detail and then click 

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(s) 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.

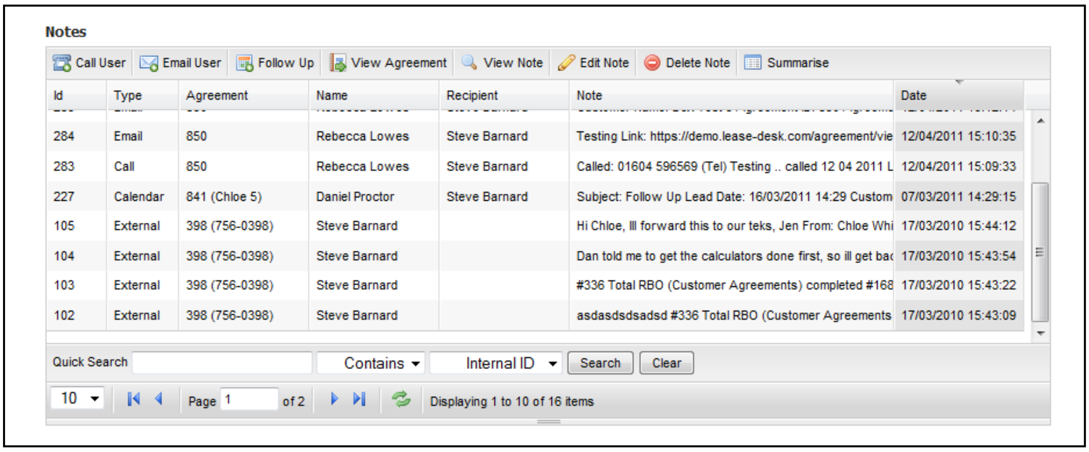
4. Once deleted you will be taken back to the Company Details screen and presented with the following confirmation message;

Note: You will be unable to delete a product if the chosen product is associated with one or more Agreements.

3.5. Adding Call, Email and Follow up Notes:

From the homepage, you have the ability to create a call, email or set a follow up note against a user and agreement.

1. Highlight the required agreement from the 'Notes' table at the bottom of the homepage as indicated below;


Notes

Call User | Email User | Follow Up | View Agreement | View Note | Edit Note | Delete Note | Summarise

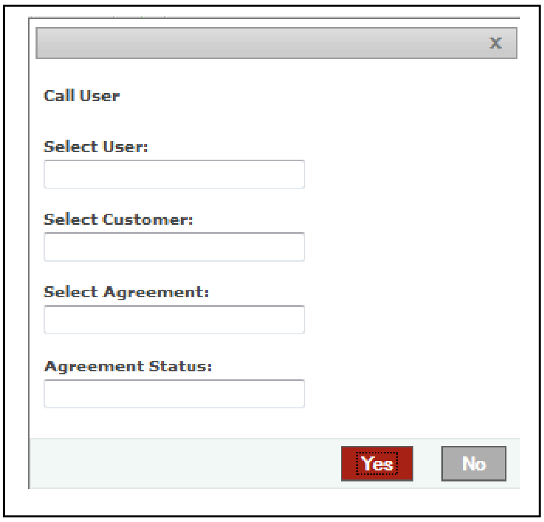
Id	Type	Agreement	Name	Recipient	Note	Date
284	Email	850	Rebecca Lowes	Steve Barnard	Testing Link: https://demo.lease-desk.com/agreement/vie	12/04/2011 15:10:35
283	Call	850	Rebecca Lowes	Steve Barnard	Called: 01604 596569 (Tel) Testing .. called 12 04 2011 L	12/04/2011 15:09:33
227	Calendar	841 (Chloe 5)	Daniel Proctor	Steve Barnard	Subject: Follow Up Lead Date: 16/03/2011 14:29 Custom	07/03/2011 14:29:15
105	External	398 (756-0398)	Steve Barnard		Hi Chloe, Ill forward this to our teks, Jen From: Chloe Whi	17/03/2010 15:44:12
104	External	398 (756-0398)	Steve Barnard		Dan told me to get the calculators done first, so ill get bac	17/03/2010 15:43:54
103	External	398 (756-0398)	Steve Barnard		#336 Total RBO (Customer Agreements) completed #168	17/03/2010 15:43:22
102	External	398 (756-0398)	Steve Barnard		asdasdsdsadsd #336 Total RBO (Customer Agreements	17/03/2010 15:43:09

Quick Search | Contains | Internal ID | Search | Clear

10 | Page 1 of 2 | Displaying 1 to 10 of 16 items

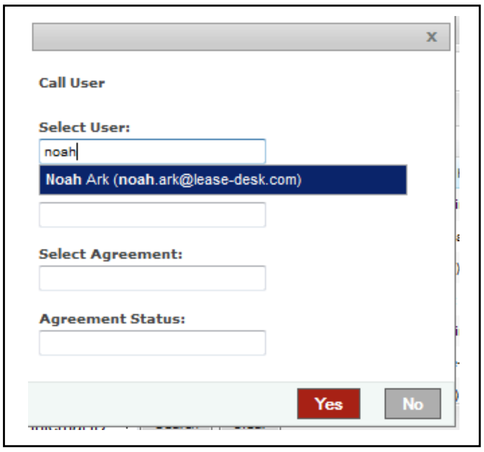
2. Next, select the required action from the options below;

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

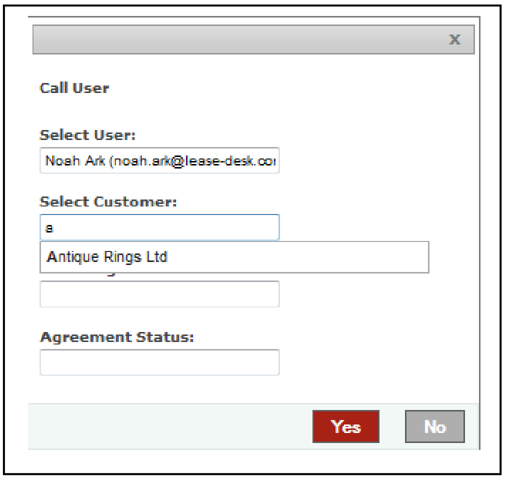


4. Add the required user name from your company in the 'Select User' box as per below;

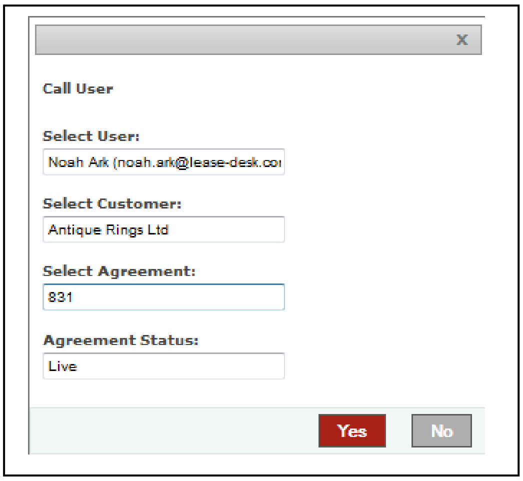
Note: This will be dependent on the individual groups that you have access to and the role type within the group, as you will only be able to see the information you have the rights to view, however as a main user typically you have access to all agreements within your organisation.



5. Next, select the customer as indicated below;



6. Then type '*' into the agreement ID box. This will bring up the list of agreement ID's if not known. The agreement status will then automatically be filled in as per the following page;

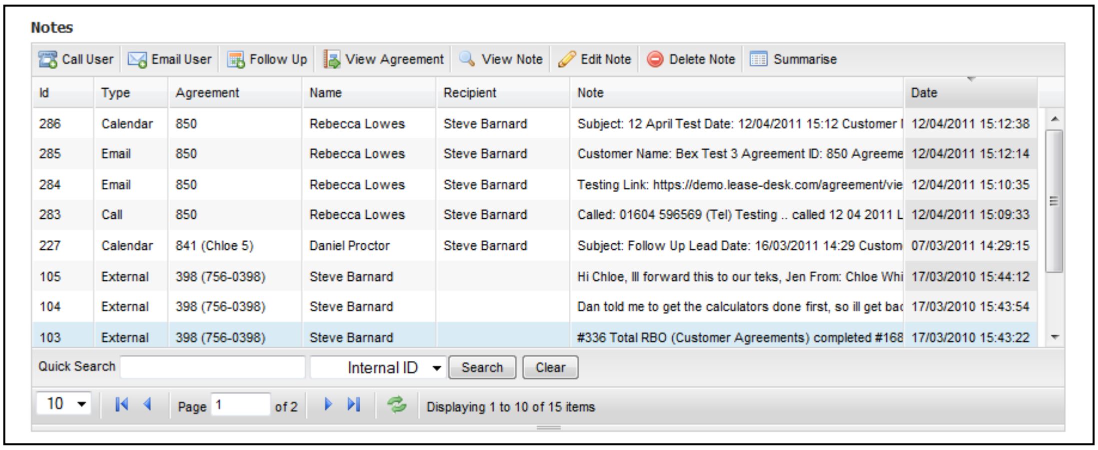


7. Click ‘Yes’ to add a note or ‘No’ to cancel.

8. Selecting ‘Yes’ will take you to the relevant note screen, dependant on the option you have selected, i.e. ‘Call User, Email or Follow Up’. For information on how to use these options, refer to sections 4.1.1 onwards.

3.6. Viewing Agreement information viewing/editing Notes:

1. From the notes table, highlight the required agreement as per below;



Id	Type	Agreement	Name	Recipient	Note	Date
286	Calendar	850	Rebecca Lowes	Steve Barnard	Subject: 12 April Test Date: 12/04/2011 15:12 Customer I	12/04/2011 15:12:38
285	Email	850	Rebecca Lowes	Steve Barnard	Customer Name: Bex Test 3 Agreement ID: 850 Agreeme	12/04/2011 15:12:14
284	Email	850	Rebecca Lowes	Steve Barnard	Testing Link: https://demo.lease-desk.com/agreement/vie	12/04/2011 15:10:35
283	Call	850	Rebecca Lowes	Steve Barnard	Called: 01604 596569 (Tel) Testing .. called 12 04 2011 L	12/04/2011 15:09:33
227	Calendar	841 (Chloe 5)	Daniel Proctor	Steve Barnard	Subject: Follow Up Lead Date: 16/03/2011 14:29 Custom	07/03/2011 14:29:15
105	External	398 (756-0398)	Steve Barnard		Hi Chloe, Ill forward this to our teks, Jen From: Chloe Whi	17/03/2010 15:44:12
104	External	398 (756-0398)	Steve Barnard		Dan told me to get the calculators done first, so ill get bac	17/03/2010 15:43:54
103	External	398 (756-0398)	Steve Barnard		#336 Total RBO (Customer Agreements) completed #168	17/03/2010 15:43:22

2. Next, click on the required option as indicated below;

3. You will then be taken to the following screen, dependant on the option you have selected;

View Agreement: This will take you to the selected view agreement page.

View Note: This will take you to the relevant view note screen.

Edit Note: This will take you to the relevant edit note screen.

Delete Note: This will remove the note completely from the system.

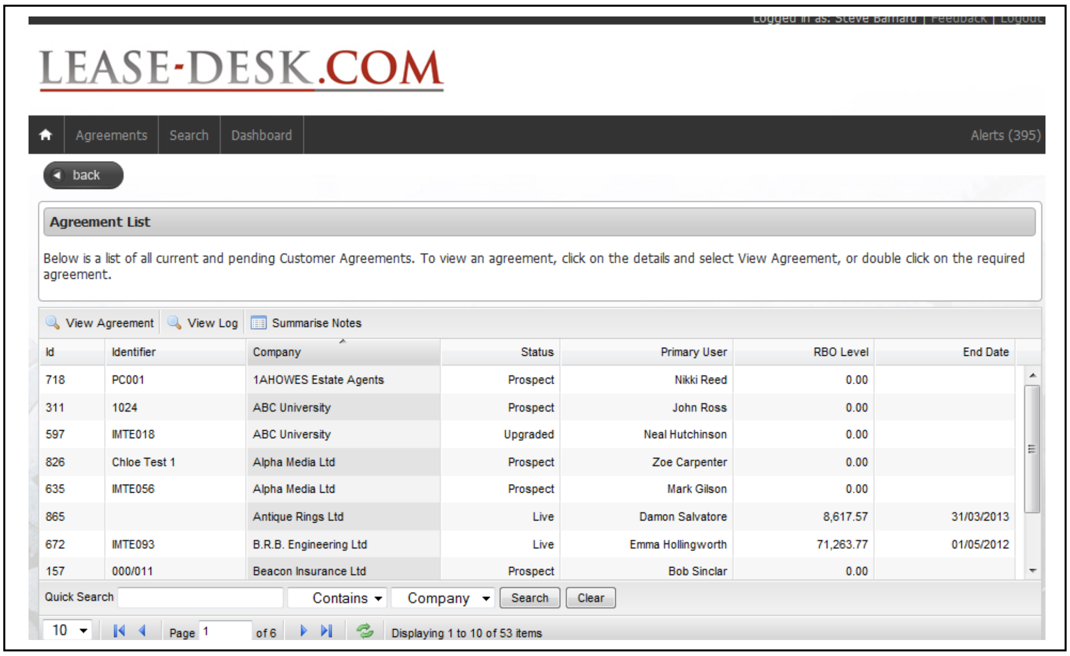
Summarise: This will take you to the main summary of all the notes within the table.

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

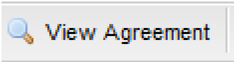
4.1. Viewing a Live or Prospect Agreement:

1. From the top toolbar menu, select 

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.com for further information).



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

4. Click 

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.

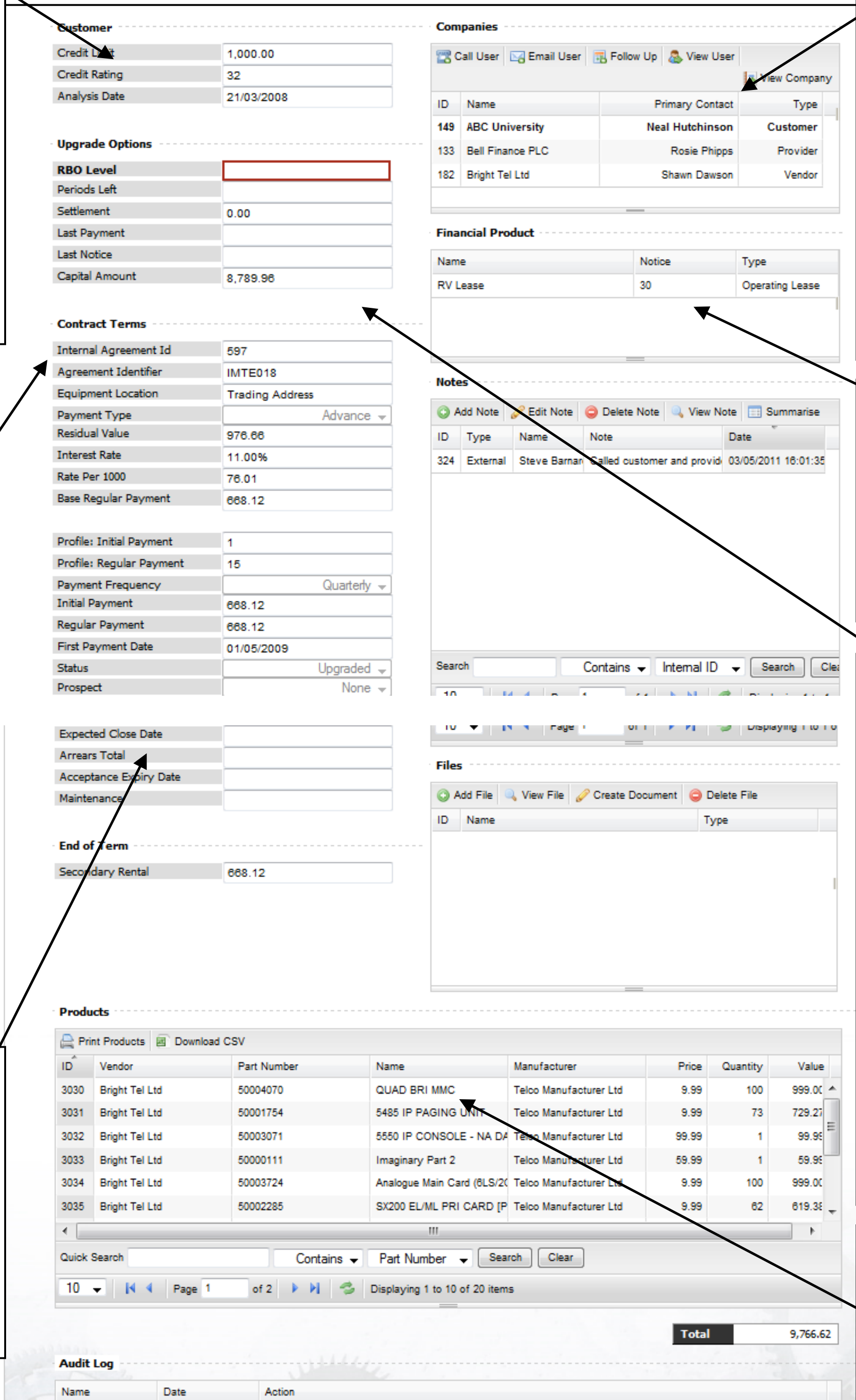
Contract Terms:

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

The Status shows 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:

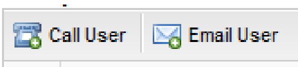
The RBO (Repeat Business Opportunity) level indicated shows how much a customer has to spend on technology refresh. **Note this is only available on live deals**

Product Information:

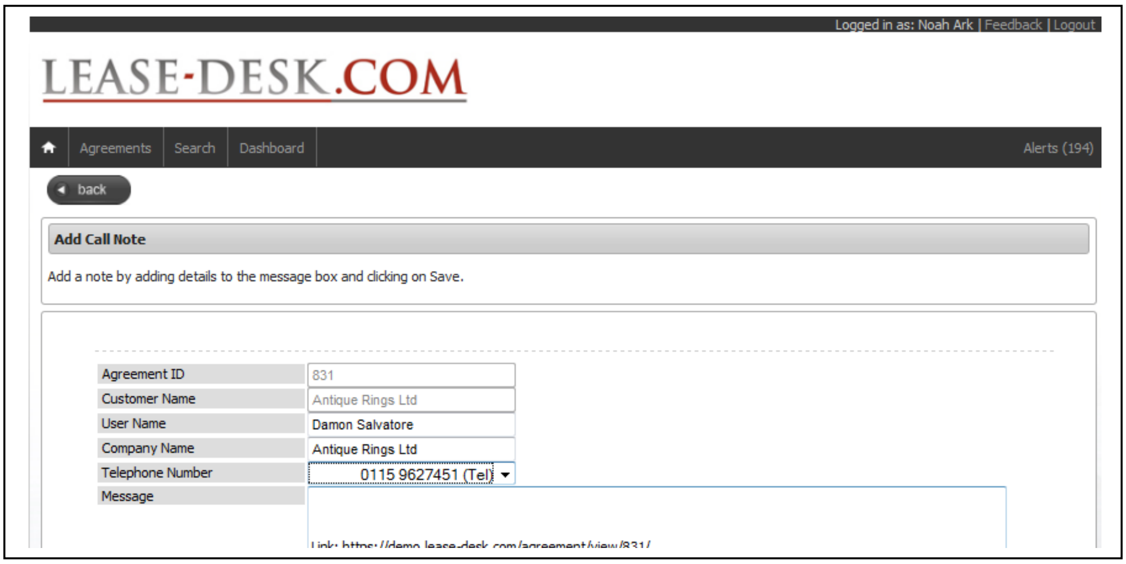
This lists the Product (s) within the agreement.

4.1.1 Calling or Emailing a Primary Contact:

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



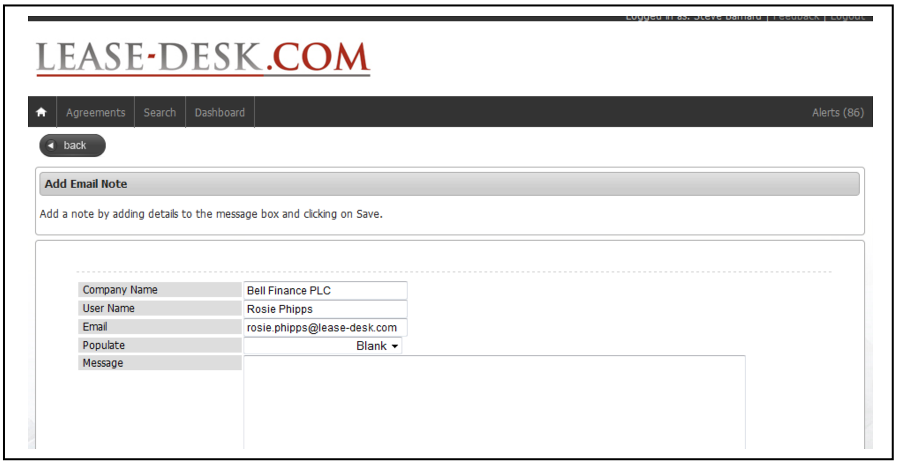
2. If you have selected the 'Call User' option, you will then be presented with the screen below. Then select the required telephone number from the drop down list.



3. Complete the details and click 

4. The detail will then be saved as a standard call note, visible within the agreement.

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

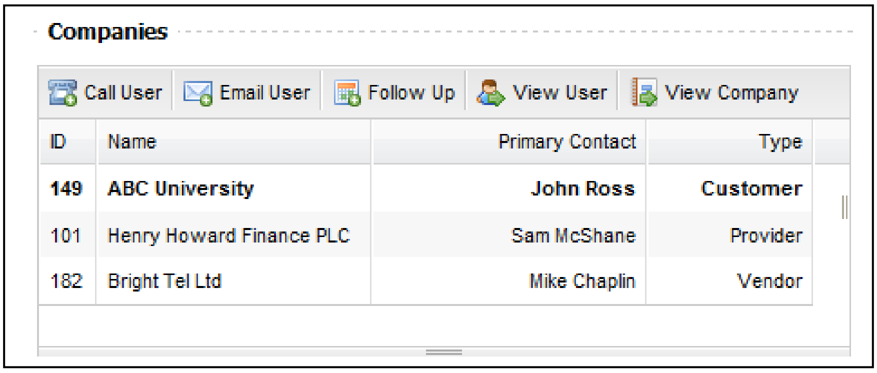


6. Select either ‘Blank’ or ‘Agreement Details’ from the ‘Populate’ dropdown list.

7. Enter the message and either click on ‘Save’, to save the message as an email note against the agreement or ‘Open in Email Client’ to open up your email ready to send the message inputted.

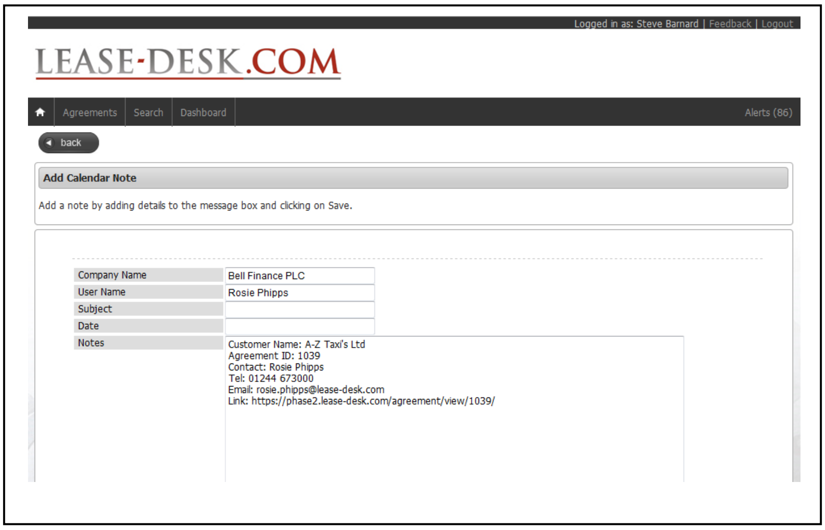
4.1.2 Creating Follow Ups:

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



2. Click on 

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



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.

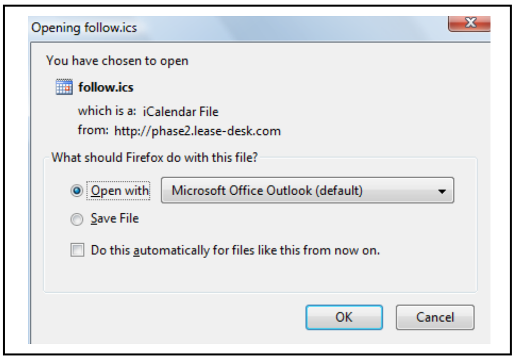
Please note: You need to set the time first of all, then the date otherwise when you try to save, it will revert back to the previous time.

6. Click 

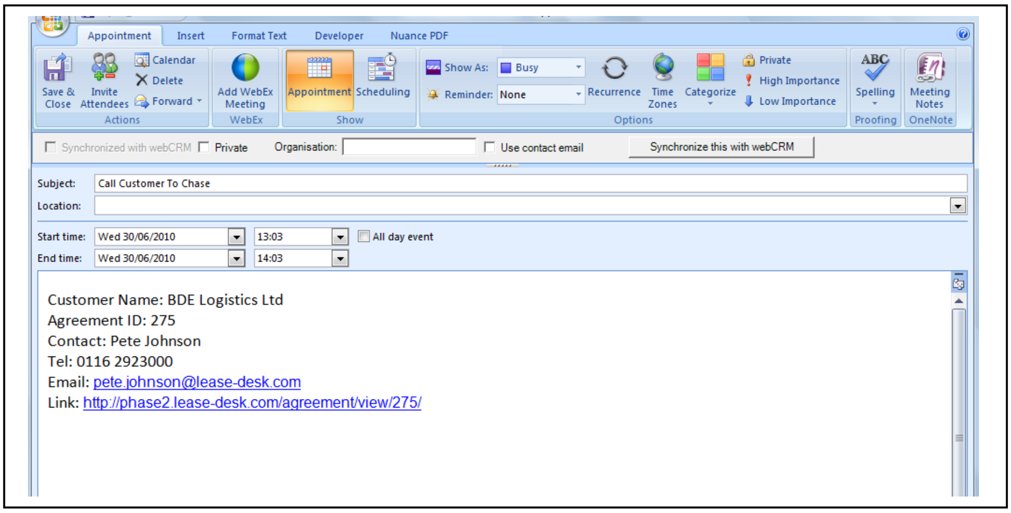
to open up your email and click


to save.

7. When you select 'Open in Local Calendar', 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;

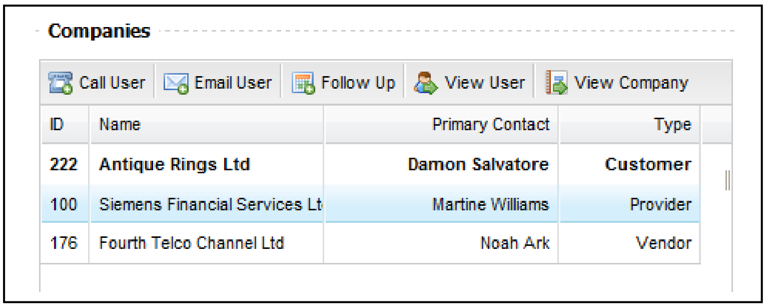


9. Click ‘Save & Close’ to then add to your outlook calendar as a reminder.

4.1.3 Viewing User or Company Information:

1. Select the required company or user from the companies section on the agreement, as indicated on the following page.

.


Companies

Call User | Email User | Follow Up | View User | View Company

ID	Name	Primary Contact	Type
222	Antique Rings Ltd	Damon Salvatore	Customer
100	Siemens Financial Services Lt	Martine Williams	Provider
176	Fourth Telco Channel Ltd	Noah Ark	Vendor

2. Click on either 

or 

from the top tool bar.

3. Dependant on the option you have selected, you will then be taken to the relevant view user main page or the view company main page.

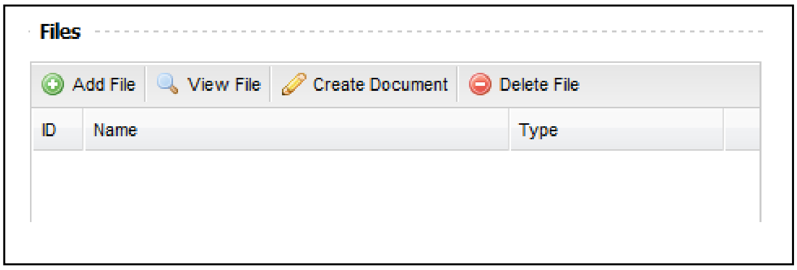
4.1.4 Adding, Viewing and Deleting a File:

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

4.1.5 Creating a Document:

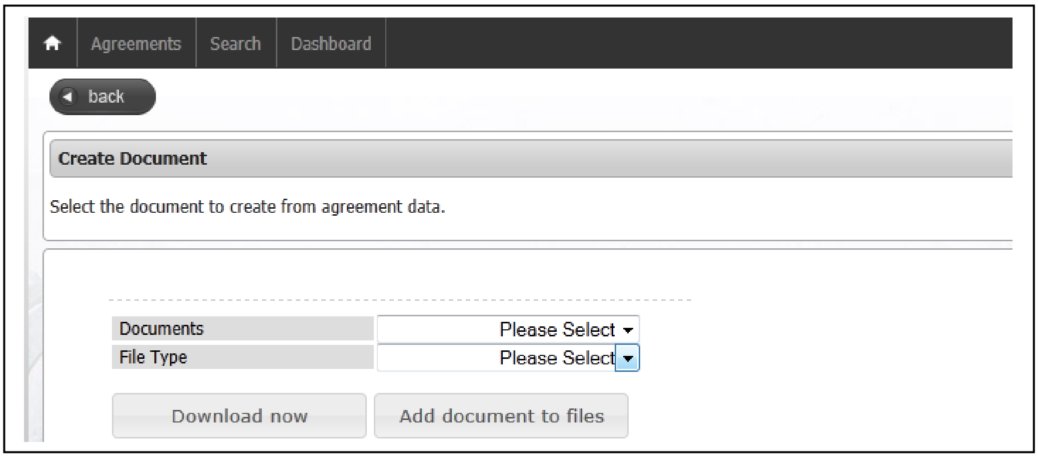
1. To create a document for an agreement, go to the ‘Files’ section on the agreement, as indicated on the following page.

Please note: There needs to be a file already loaded up on the system so that the agreement can be transferred onto a document. Super Users of the system have access to this.

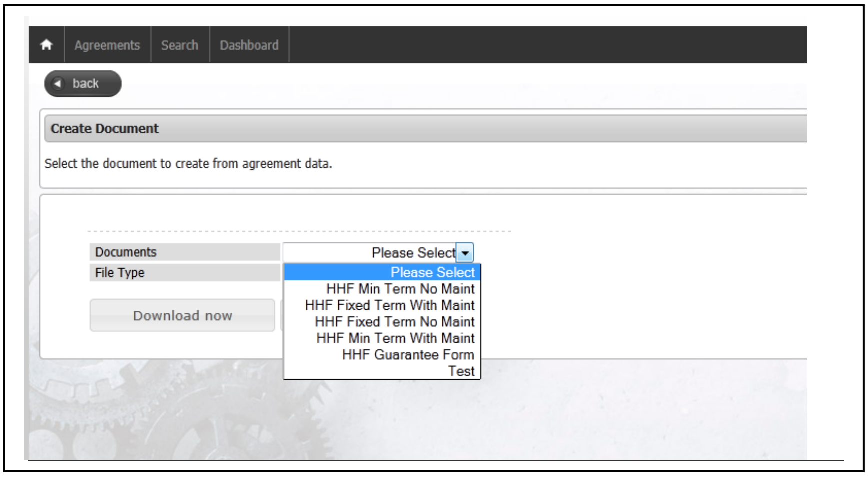


2. Click on 

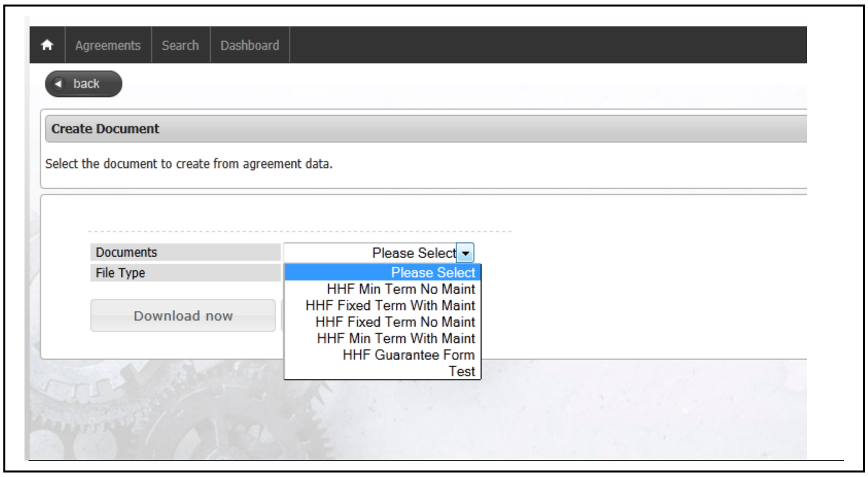
3. You will then be taken to the 'Create a document' page as indicated below;

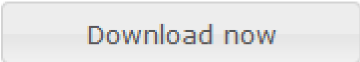


4. Select the required document from the drop down menu;



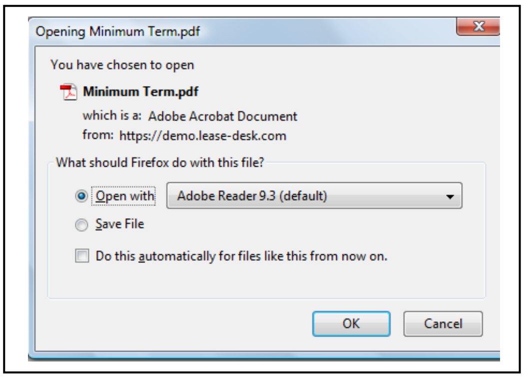
1. Choose the File Type from the Second drop down menu,

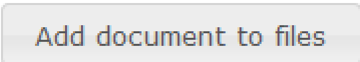


6. Select 

which will present you with a pop up as per below.

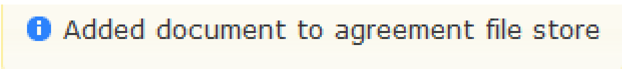
6a. Click on ‘OK’ to open into a PDF file, or ‘Cancel’ to cancel the action.



6b. Click on 

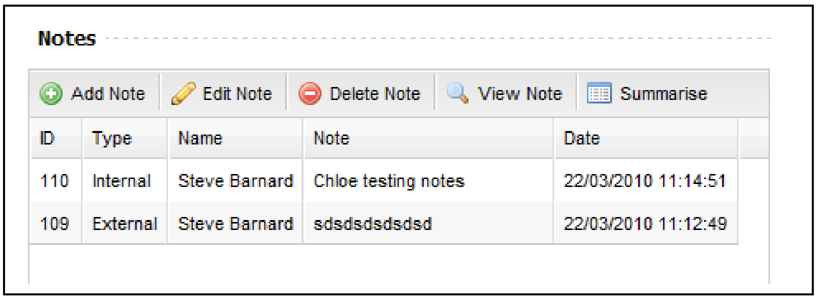
to save the auto completed PDF document within the files section of the agreement.

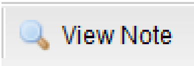
Note: If you select this option you will be presented with the following confirmation message;



4.1.6 Viewing a Note:

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

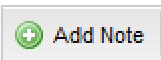


2. Click 

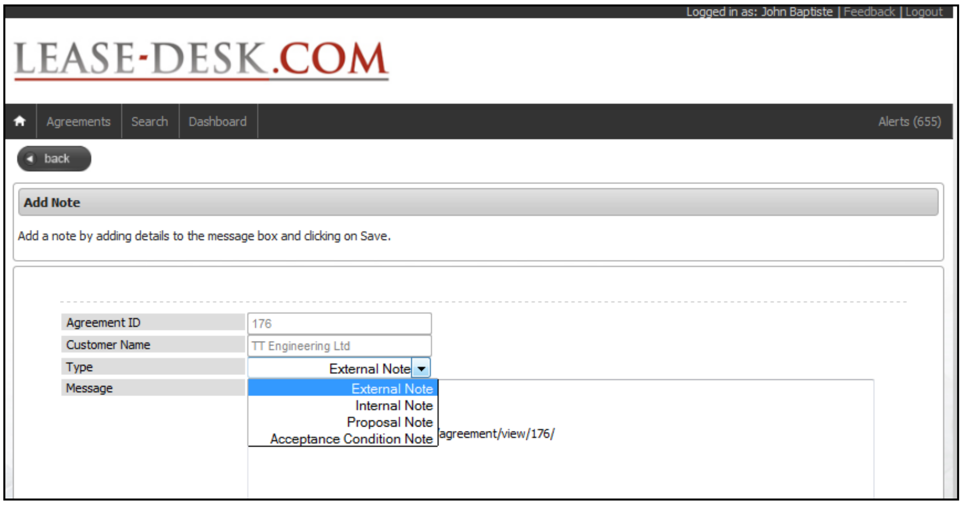
3. You will then be presented with the 'View a Note' screen which will provide all details of which user added the note and when, as indicated below;

4.1.7 Adding a Note:

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

2. Click 

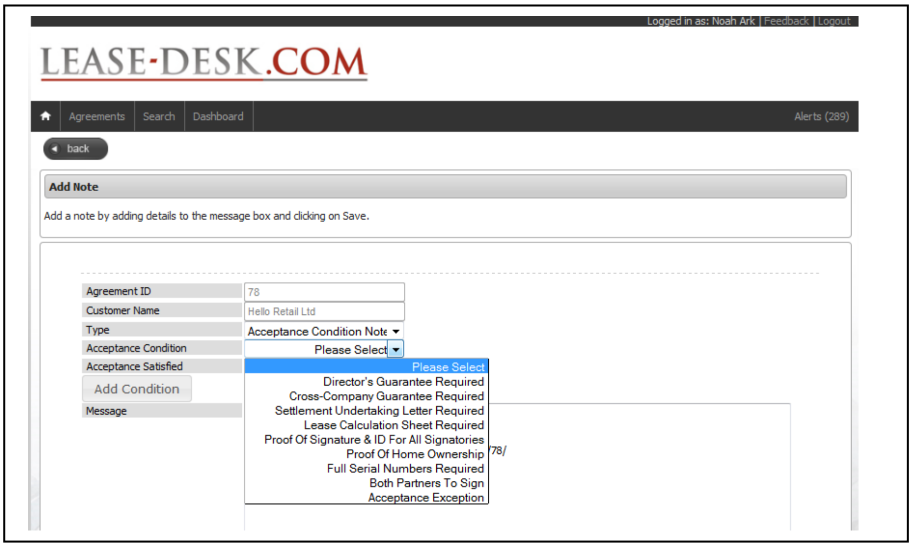
3. You will then be presented with the following 'Add Note' screen;



4. Select the Type from the drop down list.

Note: An External note will generate an email to all users that can view the particular agreement (and have their ‘receive email alerts’ box ticked within their use profile), 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.

4a. If you select ‘Acceptance Note’ you will receive an additional drop down menu as indicated below;



4b. Select the required note and click on Add Condition to add it to the message box.

Note: You also have a tick box available 'acceptance conditions satisfied'. Click this if applicable. You can also add more than one acceptance note if required.

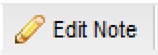
5. Type your message into the blank message box.

6. Click 

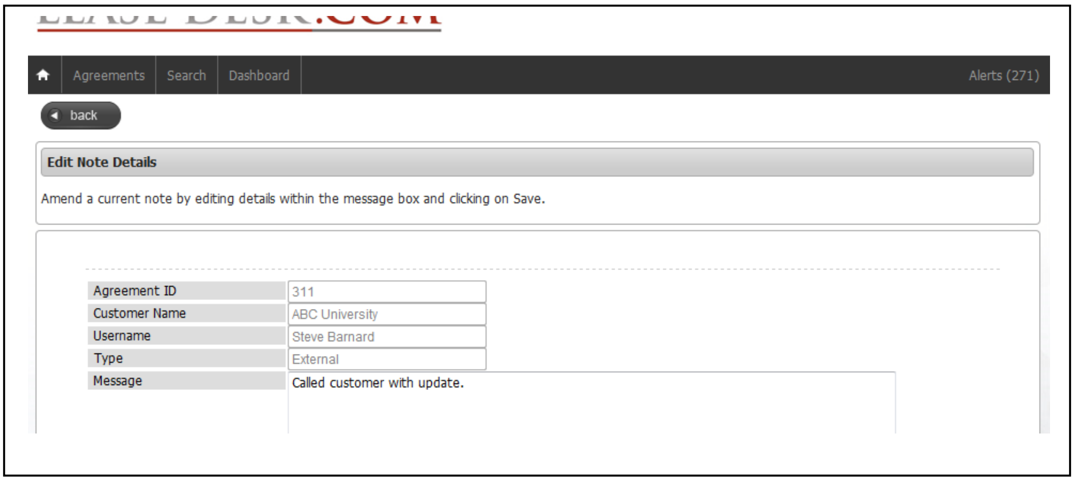
7. You will then be taken back to the main 'View Agreement' screen.

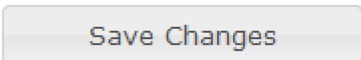
4.1.8 Editing a Note

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

2. Highlight the required note and click 

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



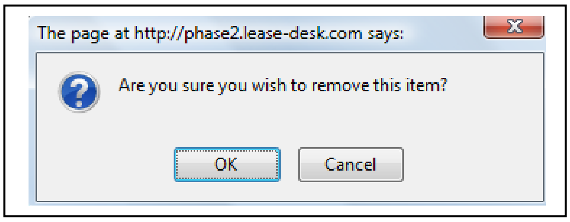
4. Amend the note as required and then click 

4.1.9 Deleting a Note:

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

2. Highlight the required note and click on 

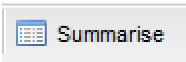
3. You will then be presented with the following confirmation message;



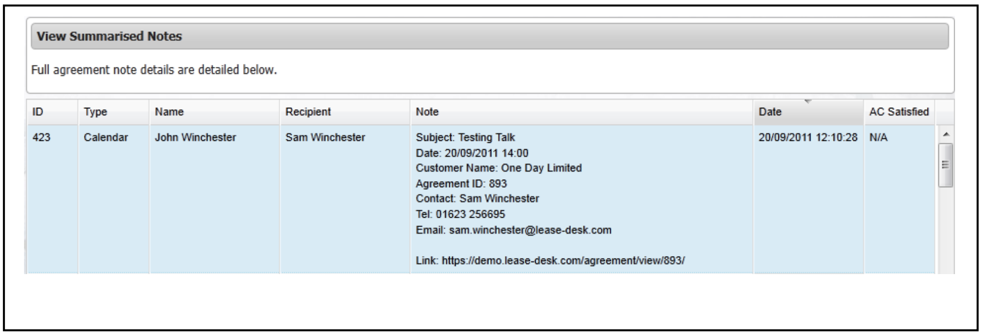
4. Select 'OK' to delete or 'Cancel' to cancel the request.

4.1.10 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:



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


View Summarised Notes

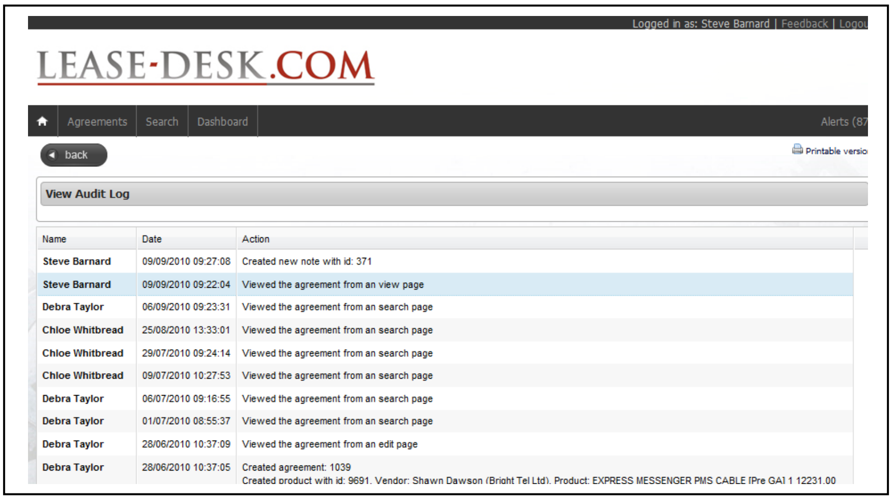
Full agreement note details are detailed below.

ID	Type	Name	Recipient	Note	Date	AC Satisfied
423	Calendar	John Winchester	Sam Winchester	Subject: Testing Talk Date: 20/09/2011 14:00 Customer Name: One Day Limited Agreement ID: 893 Contact: Sam Winchester Tel: 01623 256695 Email: sam.winchester@lease-desk.com Link: https://demo.lease-desk.com/agreement/view/893/	20/09/2011 12:10:28	N/A

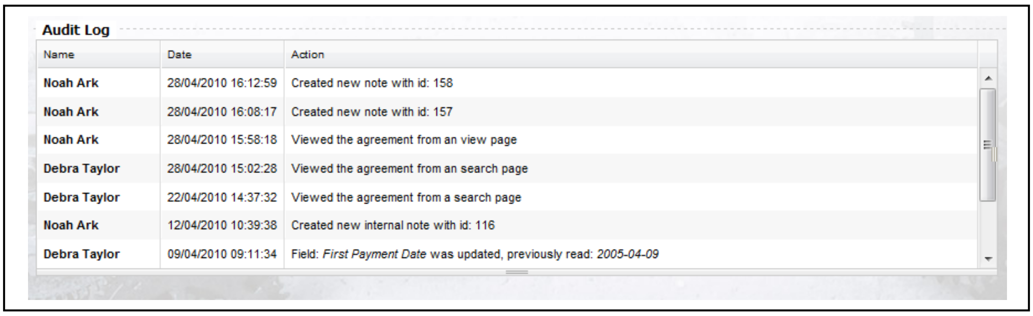
4.2. Viewing an Audit Log:

1. 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 View Log to receive the following screen;



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



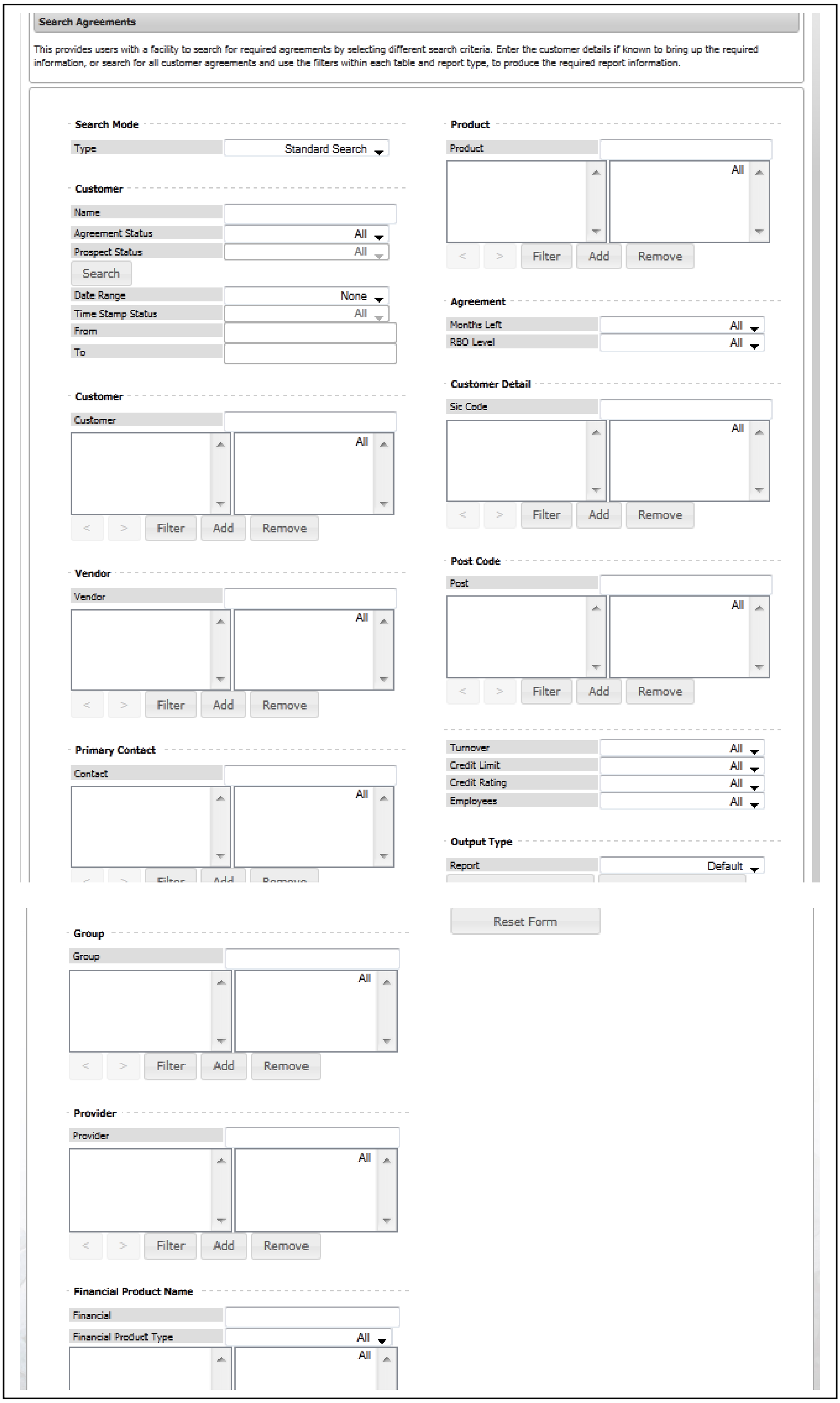
2. You will then be presented with the 'View Audit Log' section which details all user actions against the selected Agreement, as detailed below;

Note: Either way will show you the same information. It keeps a log of all activity against 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 Search on the top main menu.

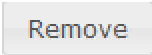
2. You will be presented with the 'Search Agreements' screen as indicated on the following page


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
Prospect Status
Search
Date Range
None
Time Stamp Status
From
To
Customer
Customer
Filter
Add
Remove
Vendor
Vendor
Primary Contact
Contact
Group
Group
Provider
Provider
Financial Product Name
Financial
Financial Product Type
Product
Product
Agreement
Months Left
RBO Level
Customer Detail
Sic Code
Post Code
Post
Turnover
Credit Limit
Credit Rating
Employees
Output Type
Report
Default
Reset Form

1. 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.

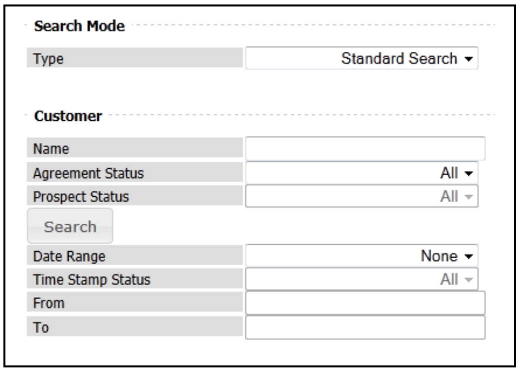
2. To bring up the information in any of the tables, click 

and then 

3. To remove any data selected, click 

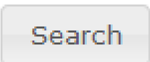
5.1. Searching for Specific Customer Agreement Information:

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.

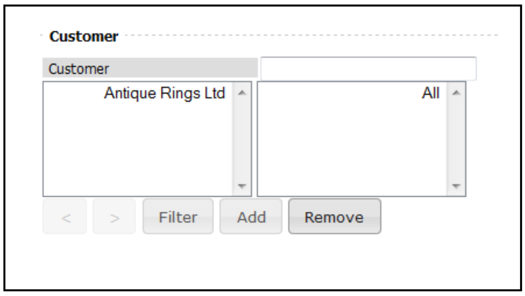


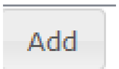
2. Complete the following details if required/known or keep as All;

- 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’.

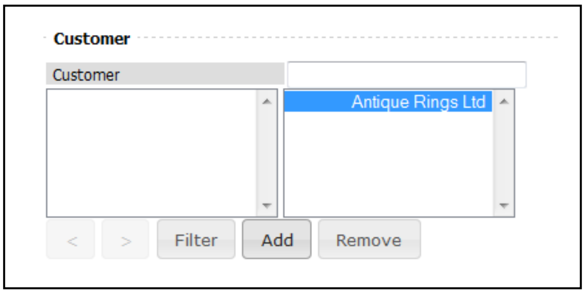
3. Click 

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;



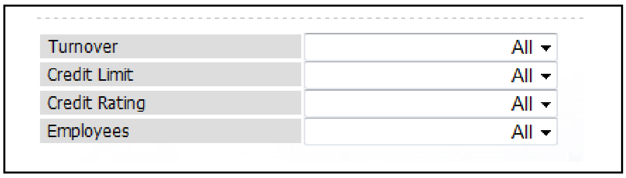
5. To include any of the produced data, within each table, in your search, highlight the required data, and then click 

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

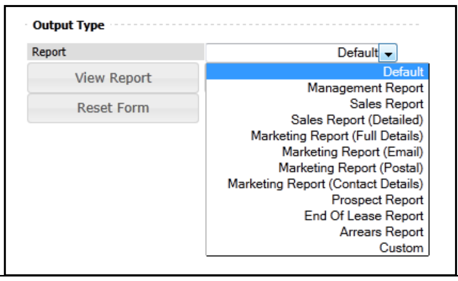


7. Carry on with each table required, following the previous step.

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, 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.

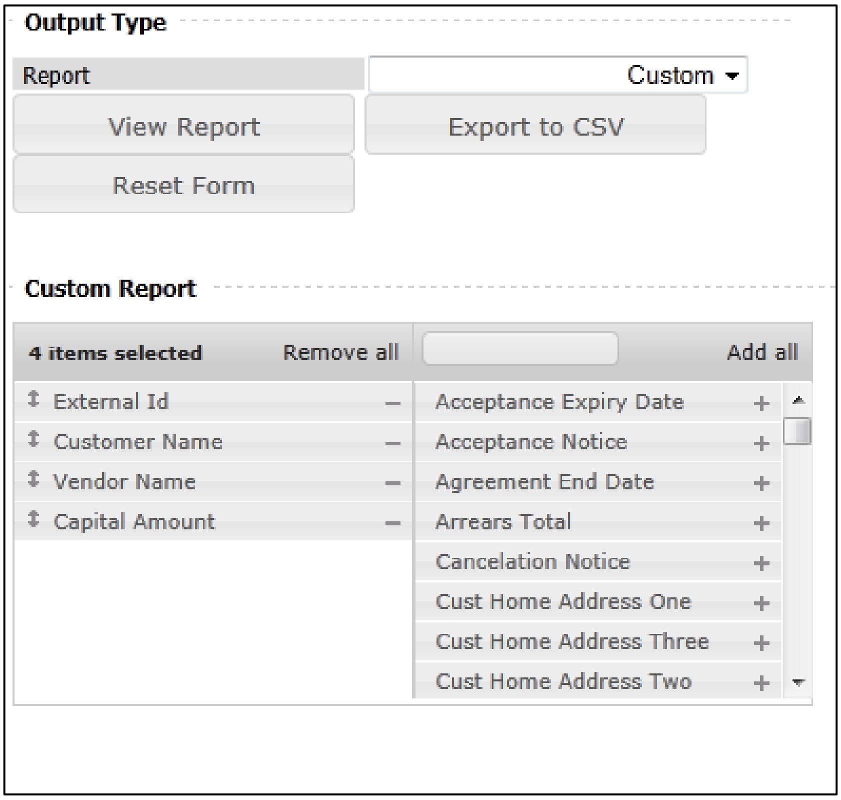
8. **Marketing Report (Contact Details):** As above, minus address but with Phone Number.

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

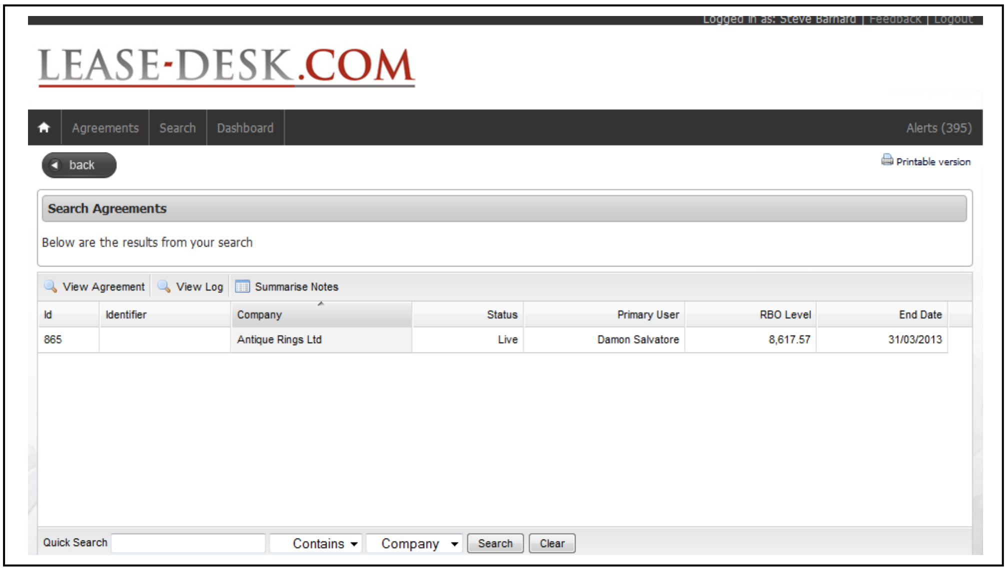
10. **End of Lease Report:** ID, Customer Name, Term Type, Put Option, Put Option Cost, Secondary Rental, Secondary Rental Split, Notice Period, Last Payment Date.

11. **Arrears Report:** ID, Customer Name, Arrears Total, Settlement Figure,

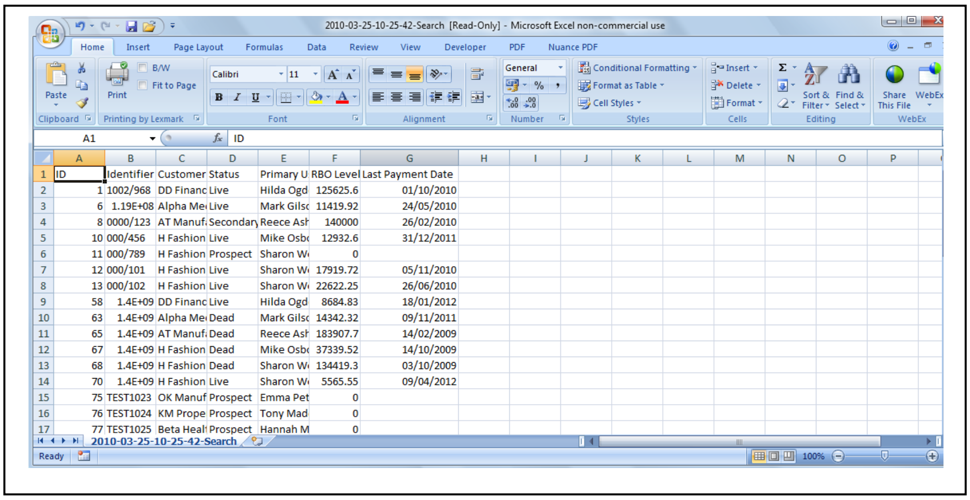
12. **Custom Report:** This report allows you to choose the information that you wish to bring through onto a report. When you select this option the following table will appear beneath the Output Type section of the screen. Here you can add/remove the information that you would like to view:



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



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



ID	Identifier	Customer	Status	Primary U	RBO Level	Last Payment Date
1	1002/968	DD Financ	Live	Hilda Ogd	125625.6	01/10/2010
6	1.19E+08	Alpha Me	Live	Mark Gilsc	11419.92	24/05/2010
8	0000/123	AT Manufa	Secondary	Reece Ash	140000	26/02/2010
10	000/456	H Fashion	Live	Mike Osbo	12932.6	31/12/2011
11	000/789	H Fashion	Prospect	Sharon W	0	
12	000/101	H Fashion	Live	Sharon W	17919.72	05/11/2010
13	000/102	H Fashion	Live	Sharon W	22622.25	26/06/2010
58	1.4E+09	DD Financ	Live	Hilda Ogd	8684.83	18/01/2012
63	1.4E+09	Alpha Me	Dead	Mark Gilsc	14342.32	09/11/2011
65	1.4E+09	AT Manufa	Dead	Reece Ash	183907.7	14/02/2009
67	1.4E+09	H Fashion	Dead	Mike Osbo	37339.52	14/10/2009
68	1.4E+09	H Fashion	Dead	Sharon W	134419.3	03/10/2009
70	1.4E+09	H Fashion	Live	Sharon W	5565.55	09/04/2012
75	TEST1023	OK Manuf	Prospect	Emma Pet	0	
76	TEST1024	KM Prope	Prospect	Tony Mad	0	
77	TEST1025	Beta Healt	Prospect	Hannah M	0	

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'.

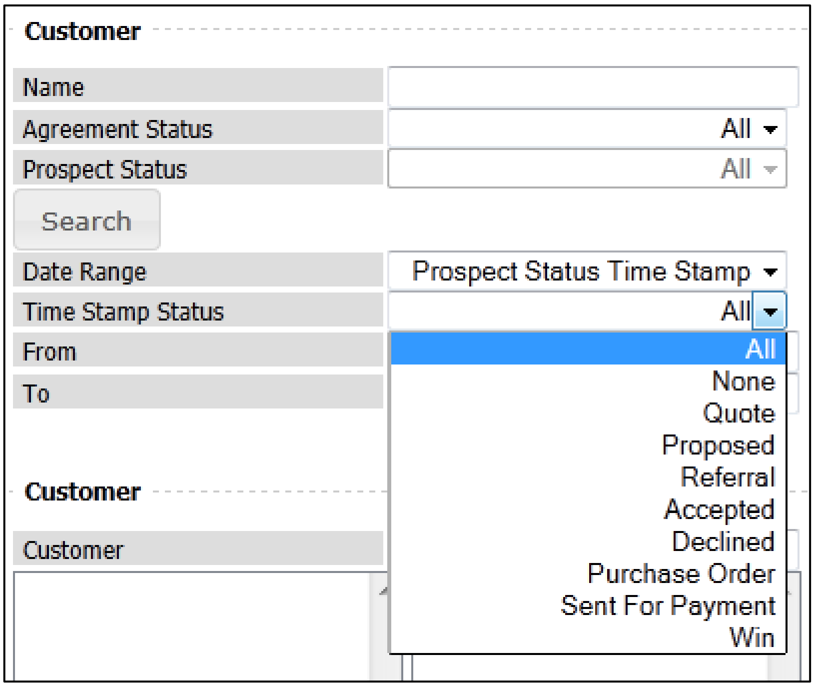
2. Click Search

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

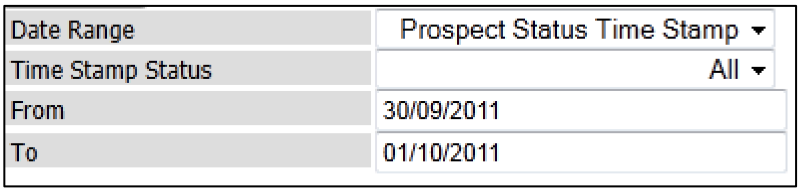
4. Follow the previous step 9 on how to select report type and view data.

5.3 Prospect Status Time Stamp

1. If you select this option in the Date range box, it will allow you to choose a status in the Time Stamp Status field, select the Prospect Status that you are searching for from the drop down list;

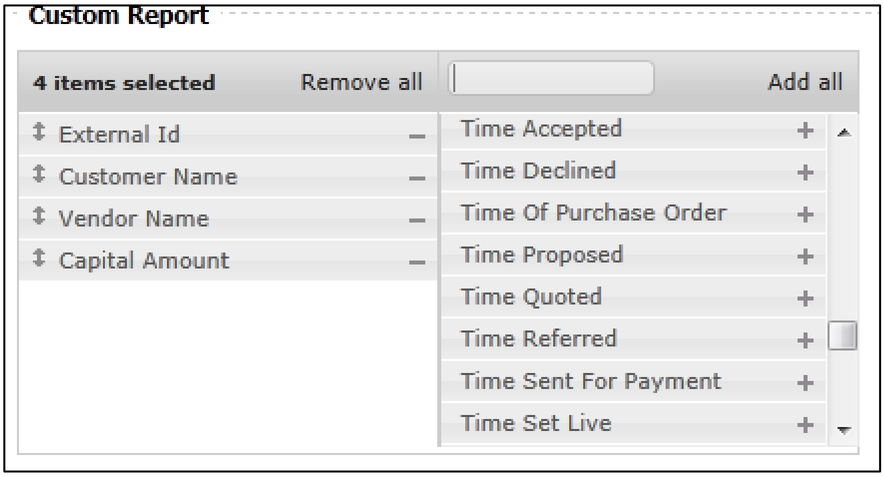


1. Next, specify the date range of the information you wish to bring through. Note if you are searching for a specific days worth of information, enter the date you require in the From box and then enter the day after into the To box. This will bring through all of the information for the 24 hours of the date you are searching for;



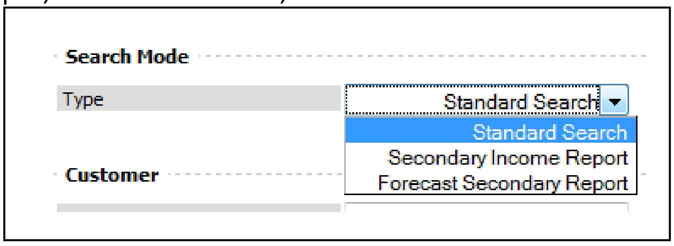
2. Click Search to bring through all of the information on the Search Screen, or select a Report type and View the Report or Export it to CSV.

3. If you wish to see the dates and times of the Prospect Time Stamps you can select these columns from the Custom report, as per below;



5.4. Changing the Search Mode:

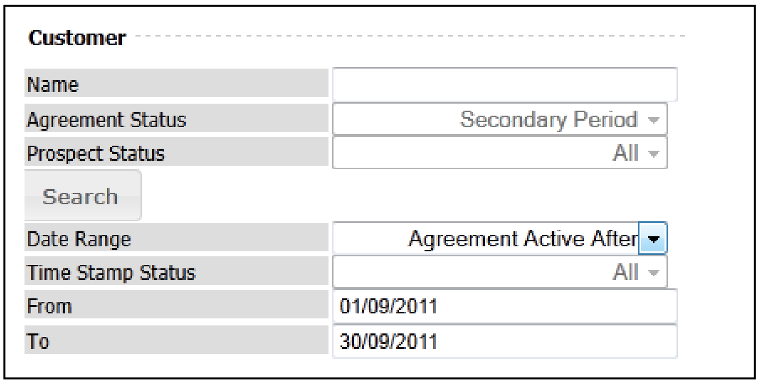
1. On the main search screen you have the option to change the search mode in order to view two additional report types, as indicated below;



5.4.1 Secondary Income Report

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

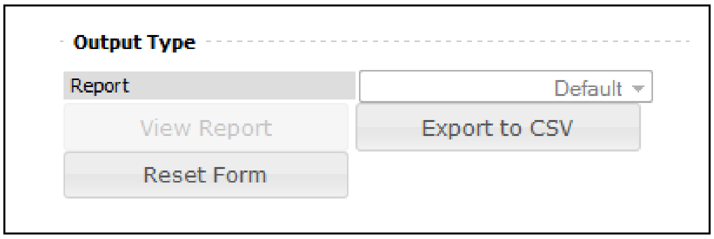
2. Next, select the date range that you wish to search for, as indicated below.



3. Continue to select the relevant criteria required from each table.

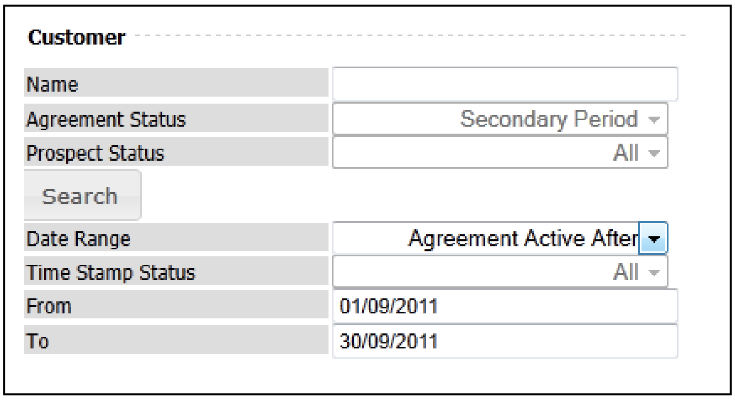
4. Note: This report type is only viewable via CSV format. To view the data, click on

as indicated below;



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'.

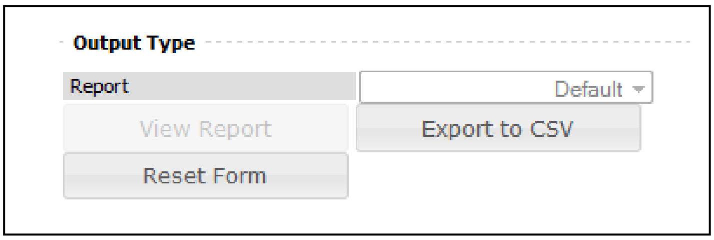


2. Next, select the date range that you wish to search for, as indicated below.

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

as indicated below;



6. Dashboard:

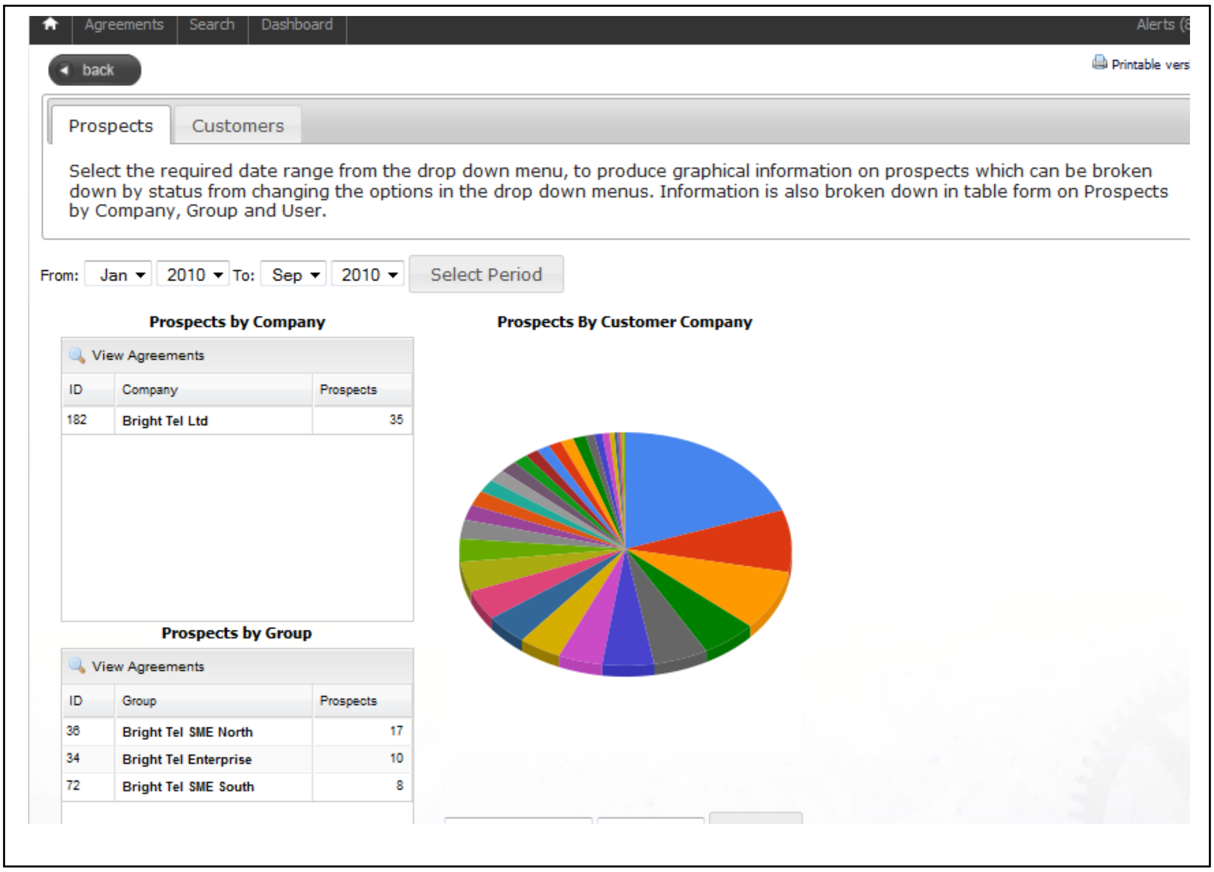
This screen provides users with a snap shot of all organisational Live and Prospect agreement information determined by role type.

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).

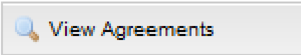
1. Go to Dashboard on the main top menu.

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 graph showing all figures, as indicated below;



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

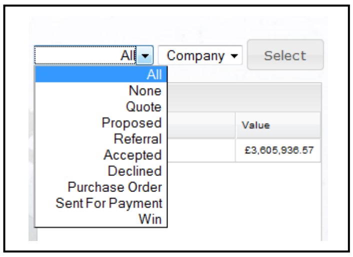
4. The data and graph presented on the page will then change as a result of the date ranges selected.

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

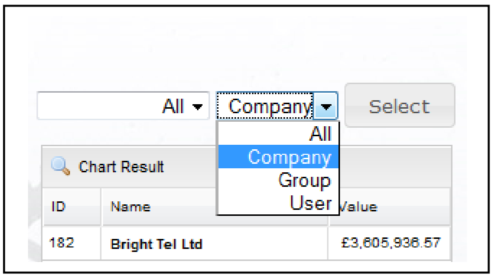
6. Alternatively, double click on the required line.

6.1.1 Viewing Top Prospect Information in Graphical Format:

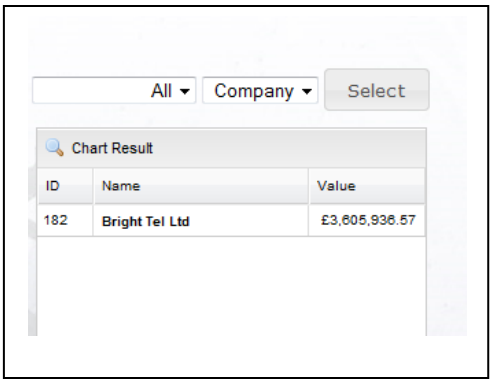
1. Go to the first drop down box underneath the graph and select the required option, as indicated below.



2. Select User, Group or Company from the second drop down menu box and click on the Select button.



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

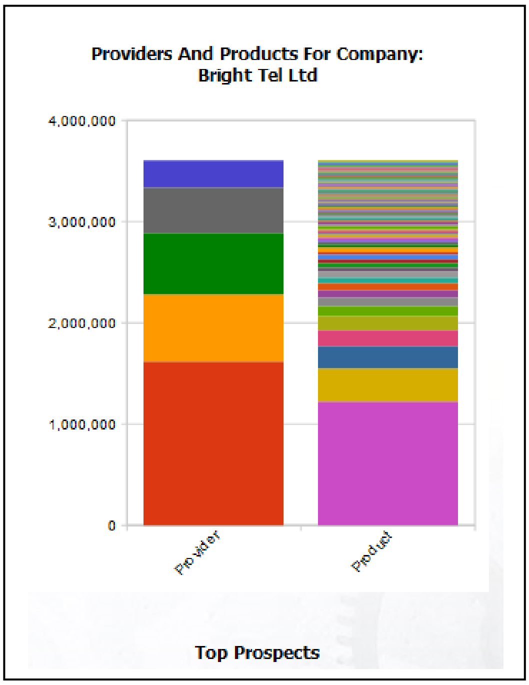


4. Highlight the individual line of information required.

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.



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

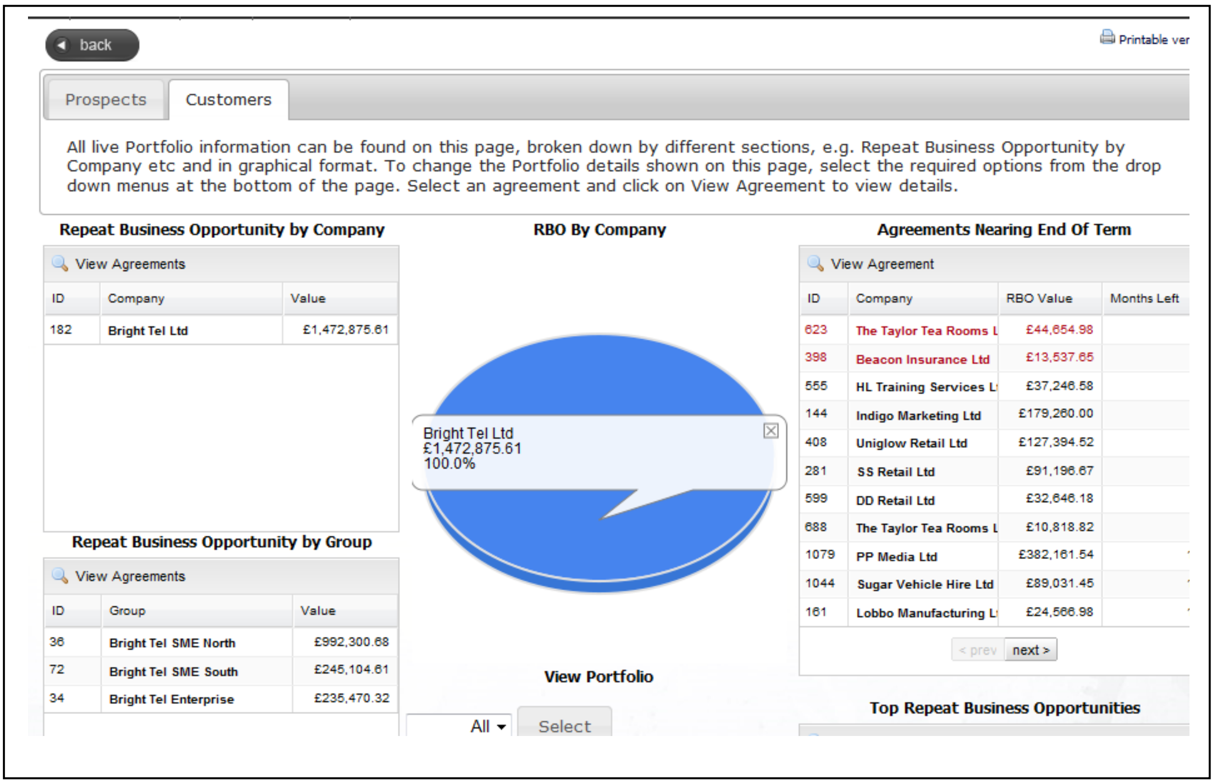
9. You will then be taken to the 'View Agreement' screen for the selected Agreement.

6.2. Customers:

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

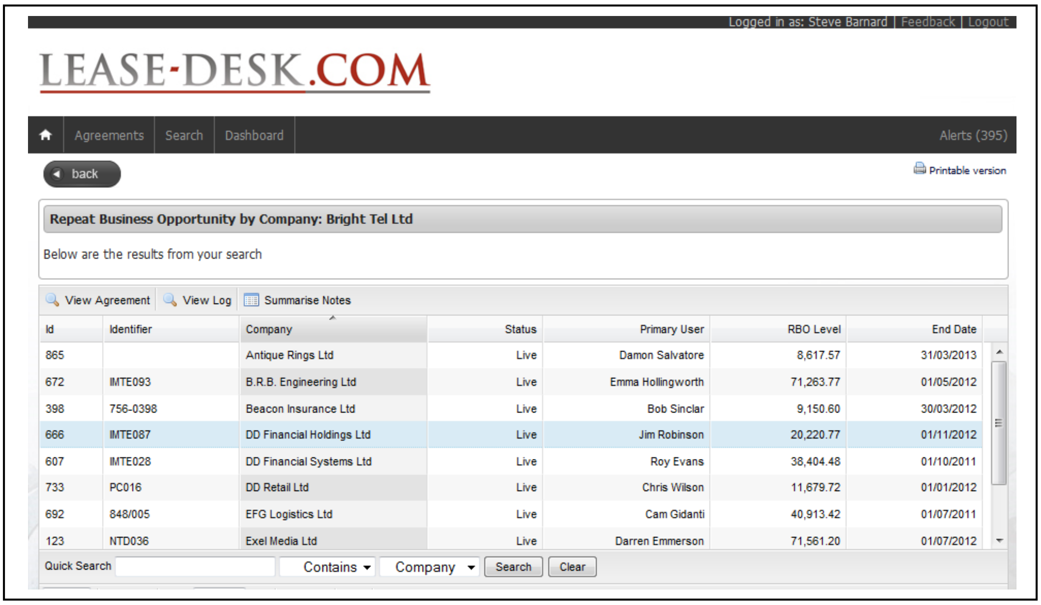
2. You will then be presented with the main Dashboard screen for customers, as indicated below. This shows a snapshot of all live customer agreement information broken down by;

- **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 View Agreements

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

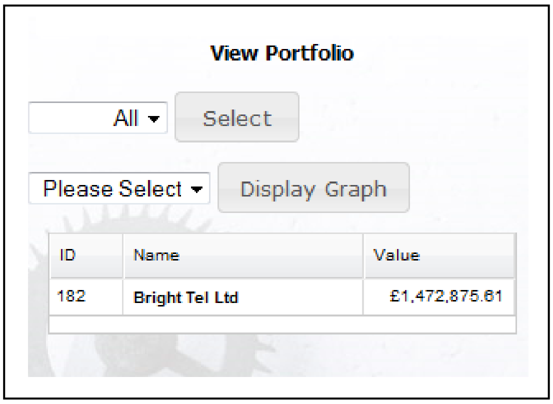


5. You then have the option to View an Agreement, View Log and Summarise Notes.

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;

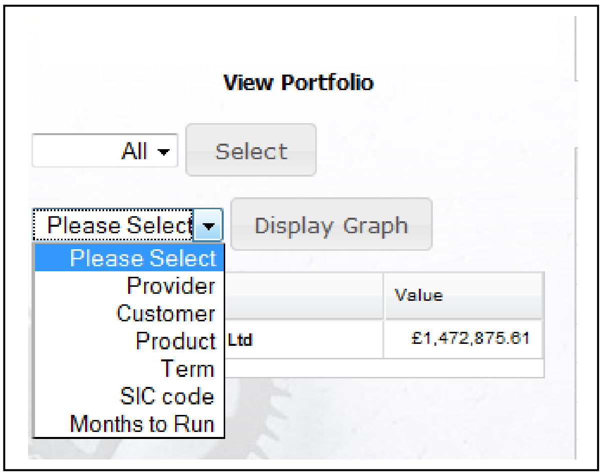


2. In the first drop down menu, select the required grouping option (Company, Group or User).

3. Click 

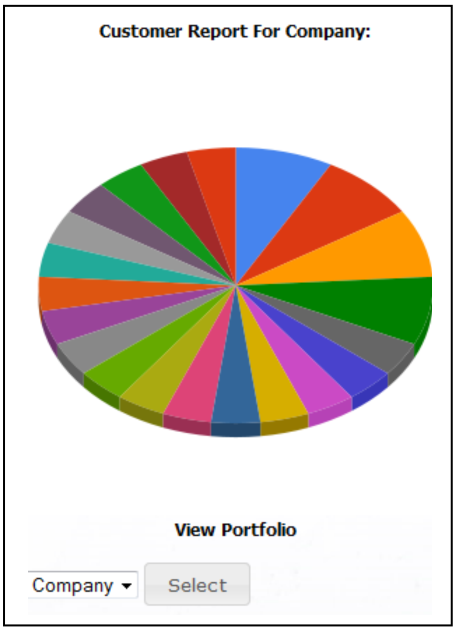
4. The information will then be presented in table format below.

5. Next select the Agreement grouping from the drop down menu, as indicated on the next page;



6. Highlight the required row from the table and click 

7. The information will then be shown in graphical format as indicated below. To view any of the segments, double click.



7. Alerts:

Part of Lease-Desk.com'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 organisations system generated alerts associated and email alerts (dependant on whether the alert tick box has been selected on your user profile).

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;

- New Live Agreement added to system:
- New Prospect Deal added to the system:
- When a Prospect changes to a 'Live' customer:
- When a Prospect Agreement Milestone Changes:
- When a Live Agreement Milestone Changes:
- When an Agreement reaches half way through the term:
- When an agreement reaches 12 months left to run:
- When an agreement reaches 9 months left to run:
- When an agreement reaches 6 months left to run:
- When an agreement reaches 5 months left to run:
- When an agreement reaches 4 months left to run:
- When an agreement reaches 3 months left to run:
- When an agreement reaches 2 months left to run:
- When an agreement reaches 1 month left to run:
- Monthly Live Agreement RBO values:
- When an agreement with a Minimum Period Financial Product reaches the end of term automatically.
- When a Fixed Period Agreement moves into the status 'End of Term' automatically:
- When a note is added onto an agreement:
- When an existing agreement note is edited:

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.***

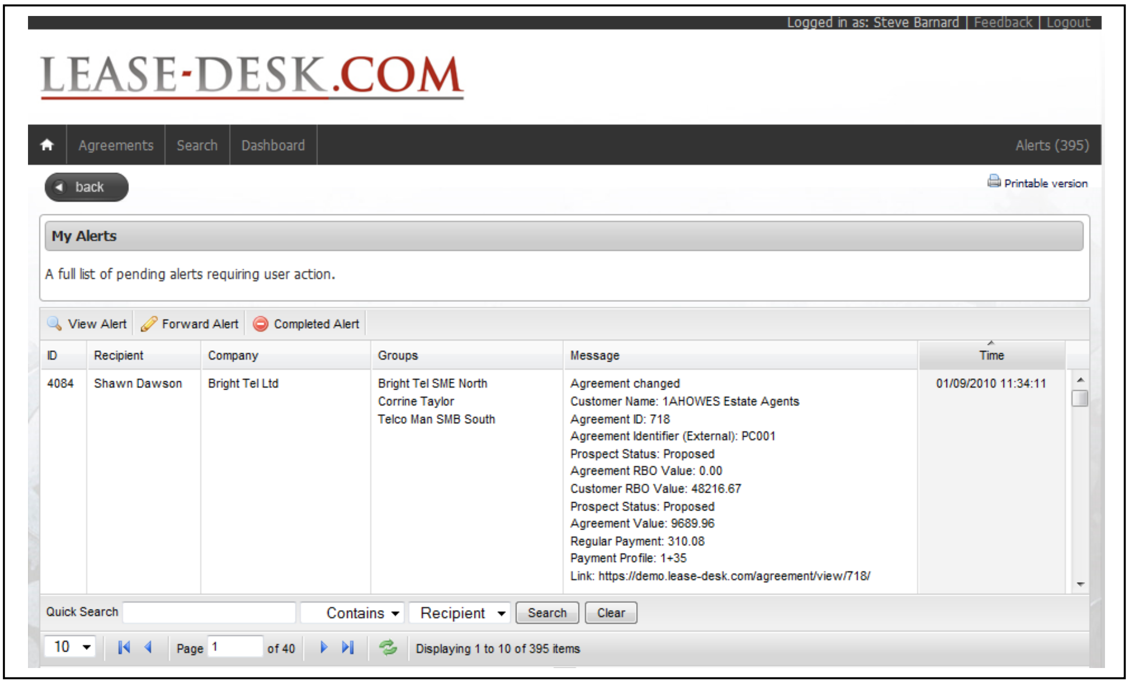
- ***Alerts that are not completed will continue to generate alerts every 3 days during the following week unless the Alert has been 'Completed' on the system.***

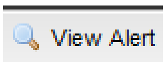
- ***If multiple agreements, whether prospect or live, for the same customer are created, the User will receive them on one email (rather than be inundated with lots of emails)***

7.1 Viewing Alerts:

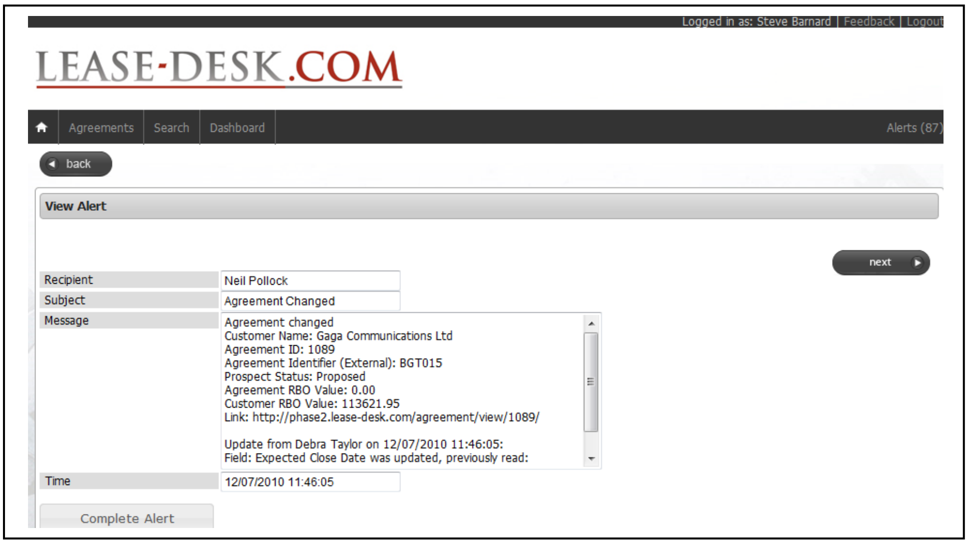
1. To view your individual or team user alerts, select  from the top menu.

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 view alert screen as indicated on the following page;



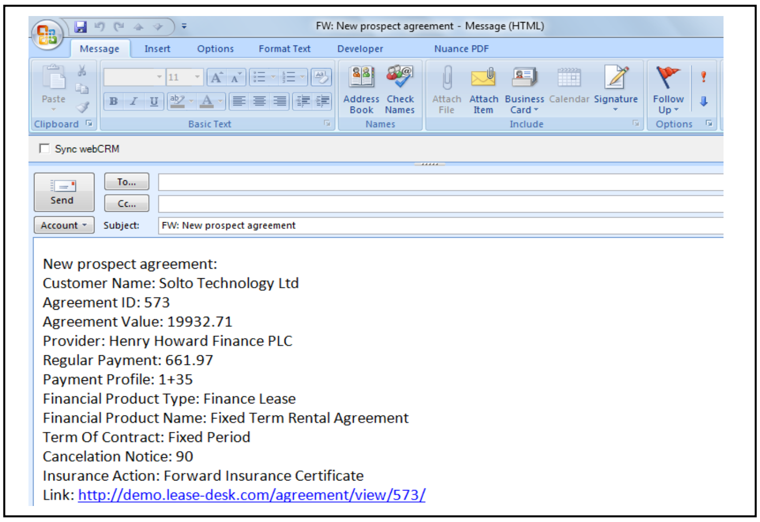
7.2 Completing Alerts:

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

7.3 Forwarding Alerts:

1. From the 'My Alerts' main view, highlight the required alert and click Forward Alert

2. The alert will then be created in mail format allowing you to forward to the relevant contact as per below;



8. General Functionality:

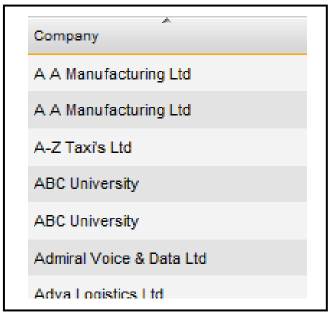
8.1. Sort:

Within Lease-Desk.com, 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.

Before Sort

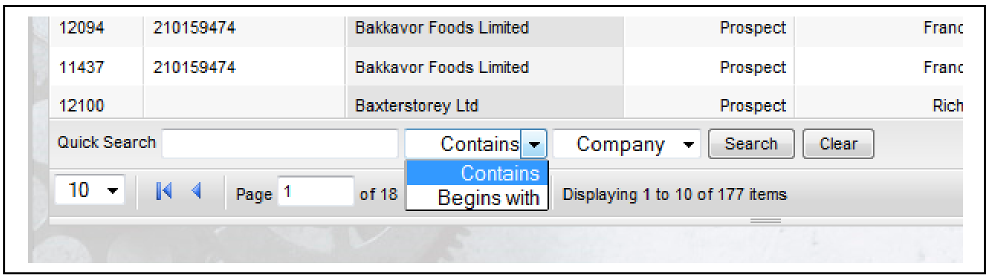
After Sort



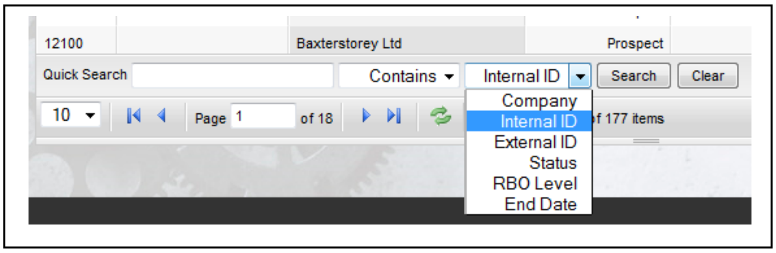
8.2 Quick Search:

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

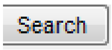
1. To use the quick search functionality, at the bottom of the screen, firstly select the required option from the first drop down menu (as indicated below)



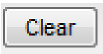
2. Next, select the required option from the second drop down menu, as indicated below;



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 

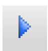
to start from the beginning.

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

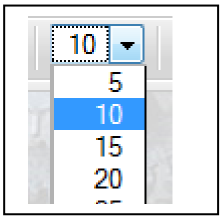
 Forward to end of records

 Go back to previous page of records

 Go to the start of the records

8.5 Changing the amount of records per view:

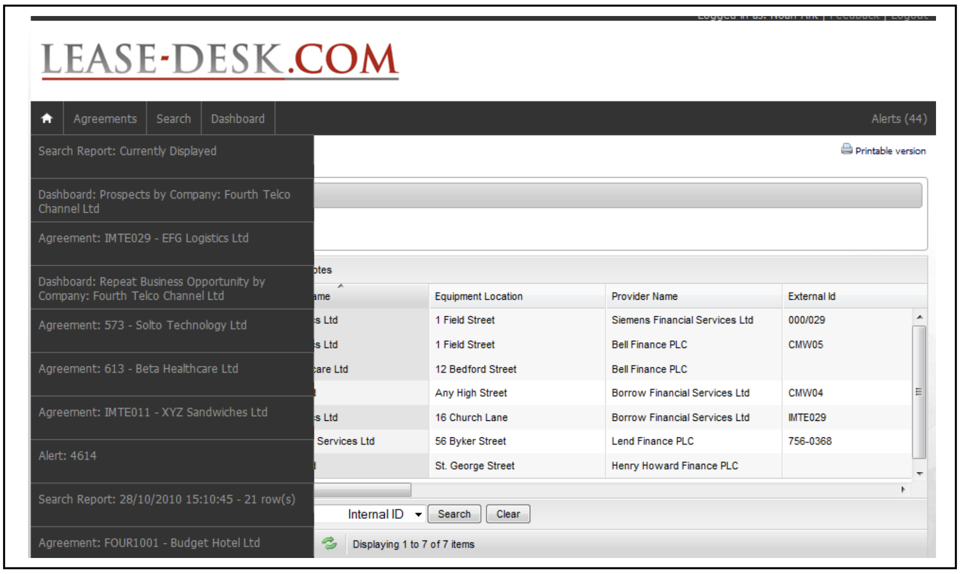
1. At the bottom of each table, select the drop down list to change the number or records viewed on a page at a time, as per below.



8.6 Last 10 Records:

1. Lease-Desk.com 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;

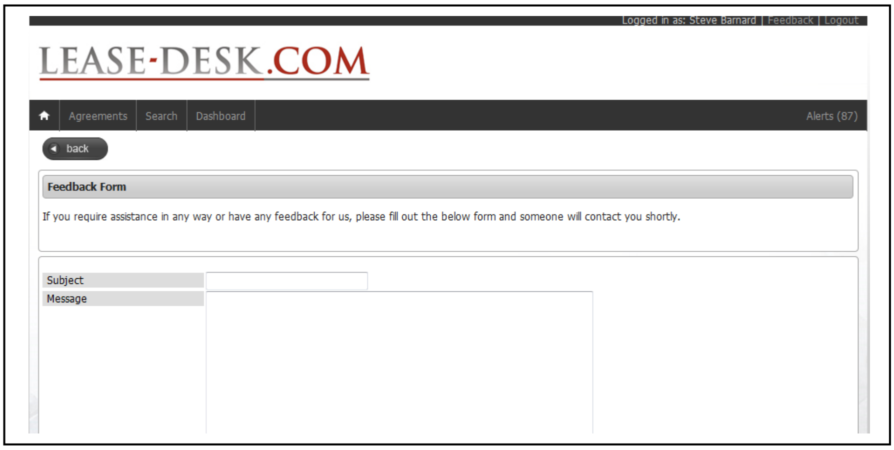


3. To go to any of the options in the dropdown list, click on the relevant item on the dropdown list.

9. Feedback:

1. To contact the Lease-Desk.com 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 on the following page;



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 the administration team at Lease-Desk 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 Lease-Desk 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.com information please contact us at;

Lease-Desk
Lakeview Drive,
Sherwood Business Park,
NG15 0DT

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